

METHODOLOGY · FORMAL REFERENCE

Automated Project Management Process

Complete Formal Reference Guide

The governing document behind our 98%-automated delivery methodology: five PMBOK® -aligned phases, five quality gates, eight numbered Power Automate flows, twenty governed Copilot prompts, and six Power Business Intelligence dashboard pages.

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This document has been prepared in accordance with the Project Management Institute's Project Management Body of Knowledge, Seventh Edition, and constitutes the authoritative reference for all automated project management processes conducted within this organization.

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Section 1: Executive Overview

1.1 Purpose and Scope of This Document

This document — the Automated Project Management Process Complete Formal Reference Guide, hereinafter referred to as "this Reference Guide" — establishes the authoritative, comprehensive, and binding procedural framework governing all aspects of automated project management within the organization. It is intended to serve as the singular, unified source of truth for all project personnel, technology administrators, governance bodies, and stakeholder representatives who participate in, oversee, or are impacted by project delivery activities conducted under this process.

The scope of this Reference Guide encompasses the full project management lifecycle, from the initial conception and formal authorization of a project through its controlled closure and archival. It explicitly covers the configuration, operation, and governance of automated tools including, but not limited to, Microsoft Copilot (the artificial intelligence — the technology that uses machine learning and large language model capabilities to assist human users with drafting, summarizing, and analyzing content — hereinafter referred to as "Copilot"), Microsoft Power Automate (the low-code workflow automation platform, hereinafter referred to as "Power Automate"), Microsoft Power Business Intelligence (the business analytics and data visualization platform, hereinafter referred to as "Power Business Intelligence"), Microsoft SharePoint (the collaborative document and list management platform, hereinafter referred to as "SharePoint"), Microsoft Teams (the unified collaboration and communication platform, hereinafter referred to as "Teams"), and Microsoft Dataverse (the scalable cloud data platform underpinning the Microsoft Power Platform, hereinafter referred to as "Dataverse").

This Reference Guide applies to all projects managed under the jurisdiction of the Project Management Office (hereinafter referred to as the "Project Management Office") and is binding upon all personnel — whether full-time employees, contractors, or external consultants — who are formally assigned to any project team governed by this framework. Any deviations from the processes, procedures, and standards set forth in this Reference Guide must be formally authorized in writing by the Project Management Office Director and documented as approved exceptions in the relevant project records.

1.2 Vision for Fully Automated Project Management

The overarching vision governing this Reference Guide is the establishment of an intelligent, integrated, and largely automated project management ecosystem in which administrative burden is systematically minimized, human decision-making is consistently supported by real-time data and artificial intelligence-generated insights, and project governance standards are enforced through technology rather than solely through manual processes. This vision is grounded in the recognition that the manual execution of project management activities — including status collection, risk identification, reporting, change tracking, and stakeholder communication — introduces significant inefficiencies, increases the likelihood of human error, and reduces the speed at which organizational leadership can respond to emerging issues.

The fully automated project management environment envisioned by this Reference Guide leverages the capabilities of the Microsoft 365 (Microsoft's cloud-based productivity and collaboration suite, hereinafter referred to as "Microsoft 365") and Microsoft Power Platform (the integrated suite of low-code development, automation, and analytics tools including Power Automate, Power Business Intelligence, Power Apps, and Dataverse, hereinafter referred to as the "Power Platform") ecosystems to create a seamless, end-to-end flow of project information. In this environment, project data is captured at the point of origination — whether through a team member submitting a status update, a risk being logged, or a milestone being marked complete — and flows automatically through validation, consolidation, notification, escalation, and reporting processes without requiring manual intervention at each step.

It is expressly acknowledged that automation does not replace human judgment. The automated processes defined in this Reference Guide are designed to ensure that the right information reaches the right people at the right time, thereby enabling faster, more informed, and more consistent human decision-making. All automated notifications, escalations, approvals, and reports require human review and, where appropriate, human action. The role of automation is to eliminate low-value administrative tasks so that project professionals can direct their attention toward strategic planning, stakeholder engagement, and problem-solving activities that genuinely require human expertise.

1.3 Integration Architecture Overview

The integration architecture supporting this automated project management process is built entirely within the Microsoft 365 and Power Platform ecosystems, ensuring data residency compliance, security consistency, and operational continuity within a single, governed technology environment. The following tools constitute the core of the integration architecture:

- **Microsoft Copilot:** The artificial intelligence assistant embedded throughout Microsoft 365 applications and the Power Platform. Copilot is used to draft documents, summarize meeting transcripts, generate risk registers, produce status reports, analyze project data, and provide natural language query capabilities within Power Business Intelligence. Copilot operates within the organization's Microsoft 365 tenant and is governed by the organization's data governance and data loss prevention policies.
- **Microsoft Power Automate:** The cloud-based workflow automation platform used to build, deploy, and manage all automated flows described in Section 6 of this Reference Guide. Power Automate connects to SharePoint, Teams, Microsoft Planner, Microsoft Forms, Microsoft Outlook, Dataverse, and Power Business Intelligence through certified connectors, enabling event-driven automation across the project management lifecycle.
- **Microsoft Power Business Intelligence:** The data visualization and business analytics platform used to build and maintain the project management performance dashboards described in Section 7 of this Reference Guide. Power Business Intelligence ingests data from SharePoint lists, Dataverse tables, Microsoft Planner (via the Microsoft Graph Application Programming Interface — the Microsoft application programming interface that enables programmatic access to Microsoft 365 data, hereinafter referred to as the "Microsoft Graph Application Programming Interface"), and external financial systems, and presents this data in role-appropriate visual reports.
- **Microsoft SharePoint:** The foundational data repository platform for this process. All project lists — including the Project Registry, Risk Register, Issue Log, Status Updates list, Budget Tracking list, Change Request log, Stakeholder Register, and Lessons Learned Register — are hosted in SharePoint. SharePoint also serves as the document management system for all project artifacts, including charters, plans, reports, and meeting records.
- **Microsoft Teams:** The primary communication and collaboration platform for all project-related interactions. Teams serves as the delivery channel for automated notifications, adaptive card approvals, meeting management, and real-time project collaboration. Each project is provisioned with a dedicated Teams environment with structured channels as defined in Section 9.5 of this Reference Guide.
- **Microsoft Dataverse:** The enterprise-grade data platform used to store structured project data that requires relational integrity, advanced security controls, and Power Platform integration. Dataverse is used for Copilot data grounding, advanced workflow state management, and integration with the broader Power Platform ecosystem including Power Apps (the low-code application development platform within the Power Platform).

The following table provides a high-level summary of the tool integration architecture:

Tool	Primary Role in This Process	Integration Points
Copilot	Artificial intelligence assistance: drafting, summarizing, analyzing	Teams, Outlook, SharePoint, Power Business Intelligence, Power Automate

Tool	Primary Role in This Process	Integration Points
Power Automate	Workflow automation: triggers, routing, notifications, escalation	SharePoint, Teams, Planner, Outlook, Forms, Dataverse, Power Business Intelligence
Power Business Intelligence	Data visualization: dashboards, reports, trend analysis	SharePoint, Dataverse, Graph Application Programming Interface, OData
SharePoint	Data repository: lists, document libraries, project sites	Power Automate, Power Business Intelligence, Teams, Copilot
Teams	Communication: notifications, approvals, meetings, channels	Power Automate, Copilot, Planner, SharePoint
Dataverse	Enterprise data: relational tables, security, Power Platform state	Power Automate, Power Business Intelligence, Copilot, Power Apps

1.4 Alignment with the Project Management Body of Knowledge, Seventh Edition

This Reference Guide is expressly designed to align with and operationalize the standards, principles, and performance domain framework established by the Project Management Institute (the globally recognized professional association for project management, hereinafter referred to as the "Project Management Institute") in its Project Management Body of Knowledge, Seventh Edition (the authoritative guide to the knowledge, skills, and principles essential for effective project management practice, hereinafter referred to as the "Project Management Body of Knowledge Seventh Edition"). The Project Management Body of Knowledge Seventh Edition represents a principles-based evolution from its predecessor editions, emphasizing outcomes-driven delivery, adaptive approaches, and stakeholder value over prescriptive process compliance alone.

This Reference Guide maps the automated processes and governance structures defined herein to the eight performance domains of the Project Management Body of Knowledge Seventh Edition — specifically: the Stakeholder Performance Domain, the Team Performance Domain, the Development Approach and Life Cycle Performance Domain, the Planning Performance Domain, the Project Work Performance Domain, the Delivery Performance Domain, the Measurement Performance Domain, and the Uncertainty Performance Domain. Additionally, all twelve guiding principles of the Project Management Body of Knowledge Seventh Edition are embedded into the governance, automation, and human-review elements of this process, as detailed in Section 4 of this Reference Guide. The practical embodiment of these principles and performance domains in the specific automated workflows, quality gates, and escalation procedures defined in this Reference Guide ensures that compliance with Project Management Institute standards is not merely aspirational but is systematically enforced at the process level.

1.5 Governing Authority, Document Owner, and Version Control

The governing authority for this Reference Guide is the Project Management Office, which operates under the direction of the Project Management Office Director. The Project Management Office Director is responsible for ensuring that this Reference Guide remains current, accurate, and aligned with organizational strategy, applicable standards, and evolving technology capabilities. The Project Management Office Director may delegate specific governance responsibilities to the Microsoft Copilot Coordinator and the Microsoft Power Platform Administrator, as defined in Section 2 of this Reference Guide, but ultimate accountability for this Reference Guide rests with the Project Management Office Director.

This Reference Guide is subject to formal review on an annual basis or upon the occurrence of any of the following triggering events: a material change to the Microsoft 365 or Power Platform toolset; a revision to the Project Management Body of Knowledge or other governing Project Management Institute standards; a significant organizational restructuring affecting project governance; or a formal audit finding that requires process changes. All revisions must follow the change control process defined in Section 11 of this Reference Guide, and all approved versions must be recorded in the Version Control Table above. The most current approved version of this Reference Guide shall be maintained in the Project Management Office document library on SharePoint and shall supersede all prior versions upon its effective date.

Section 2: Organizational Roles and Responsibilities

2.1 Role Definitions

Executive Sponsor

The Executive Sponsor is the senior organizational leader who holds ultimate accountability for the strategic outcome and business value of the project. This individual authorizes the Project Charter, secures funding, removes organizational impediments that exceed the Project Manager's authority, and serves as the primary liaison between the project and the organization's executive leadership team. The Executive Sponsor engages directly with automated reporting through the Power Business Intelligence Executive Portfolio Overview dashboard page and receives automated escalation alerts from Power Automate when budget variances exceed twenty-five percent of the approved baseline or when critical risks reach a severity rating of five on a five-point scale.

Portfolio Manager

The Portfolio Manager is responsible for overseeing the strategic alignment, prioritization, and resource allocation of all projects within the organizational portfolio. This individual reviews the Power Business Intelligence Executive Portfolio Overview dashboard to monitor portfolio-level performance, approves the initiation of new projects based on strategic fit and capacity availability, and coordinates with the Project Management Office Director to resolve cross-project resource conflicts. The Portfolio Manager receives weekly automated digest reports generated by Power Automate summarizing the status of all active projects.

Project Steering Committee

The Project Steering Committee is a formal governance body composed of senior stakeholders representing the key business units and functions affected by the project. The Project Steering Committee reviews and approves milestone completion through the automated gate review process defined in Flow 6.4, provides strategic direction at formal review meetings, and resolves escalated issues that exceed the Project Manager's authority. Members of the Project Steering Committee receive automated milestone completion notifications and are required to provide formal digital approval or rejection responses through Teams adaptive card approvals.

Project Management Office Director

The Project Management Office Director leads the Project Management Office and is responsible for establishing, maintaining, and enforcing all project management standards, methodologies, templates, and governance processes across the organization. This individual owns this Reference Guide, approves all material deviations from standard process, and has oversight authority over all Power Platform configurations used in project management automation. The Project Management Office Director reviews the portfolio-level Power Business Intelligence dashboard weekly and participates in executive governance forums as the voice of project management standards.

Project Manager

The Project Manager is the individual assigned with the day-to-day responsibility for planning, executing, monitoring, controlling, and closing a specific project. The Project Manager is responsible for the overall success of the project within the constraints of scope, schedule, budget, quality, and stakeholder satisfaction. This individual is the primary user and consumer of all automated project management tools defined in this Reference Guide, receives all automated escalation notifications generated by Power Automate, reviews and approves all Copilot-generated drafts before formal publication, and is accountable for ensuring the accuracy of project data entered into SharePoint lists and Microsoft Planner.

Deputy Project Manager

The Deputy Project Manager supports the Project Manager in executing all project management responsibilities and acts as the designated substitute for the Project Manager in their absence. This individual is responsible for monitoring the completeness and accuracy of team member status update submissions, coordinating follow-up actions when automated reminders do not elicit responses, and managing the day-to-day administrative operations of the project site on SharePoint. The Deputy Project Manager has full access to all automated workflow dashboards and Power Business Intelligence reports applicable to the project.

Business Analyst

The Business Analyst is responsible for eliciting, documenting, and validating business and functional requirements; facilitating stakeholder workshops; translating organizational needs into actionable project scope; and supporting the development and review of the Work Breakdown Structure (the hierarchical decomposition of the total project scope into manageable components, hereinafter referred to as the "Work Breakdown Structure"). The Business Analyst contributes to Copilot-assisted charter drafting by providing structured stakeholder input summaries and is the primary author of the requirements documentation stored in the project SharePoint document library.

Technical Lead and Solution Architect

The Technical Lead and Solution Architect is responsible for defining the technical approach, solution design, and architectural standards for the project's technical deliverables. This individual reviews all technical scope items in the Work Breakdown Structure, identifies technical risks and dependencies, and approves technical deliverables at quality gates. The Technical Lead and Solution Architect is a required Consultant on all change requests with a technical impact classification and participates in the Change Control Board review process for technically complex changes.

Subject Matter Expert

The Subject Matter Expert is an individual with deep domain-specific knowledge who is engaged on a consultative basis to provide expert input into specific aspects of the project. Subject Matter Experts are assigned to specific tasks or review activities within Microsoft Planner and are included in automated notifications relevant to their area of expertise. Subject Matter Experts do not carry ongoing project management responsibilities but are expected to respond to consultation requests within the timeframes specified in the Communication Plan defined in Section 9 of this Reference Guide.

Project Team Member

Project Team Members are the individuals who perform the work of the project as defined in the Work Breakdown Structure and reflected in their task assignments in Microsoft Planner. Each Project Team Member is responsible for submitting accurate and timely weekly status updates through the automated collection process defined in Flow 6.1, maintaining the currency of their task completion percentages in Microsoft Planner, and logging risks or issues as they are identified in the SharePoint Risk Register and Issue Log. Project Team Members participate in project meetings, collaborate through the project Teams channels, and are expected to respond to all automated requests within the timeframes specified in the Communication Plan.

Quality Assurance Manager

The Quality Assurance Manager is responsible for establishing and enforcing the project's quality management plan as defined in Section 8 of this Reference Guide, conducting formal quality audits of project processes and deliverables, and approving deliverables at designated quality gates. This individual reviews quality-related data in the Power Business Intelligence dashboard, documents non-conformances in the Issue Log on SharePoint, and works with the Project Manager to implement corrective actions when quality standards are not met.

Risk Manager

The Risk Manager is responsible for overseeing the comprehensive identification, assessment, response planning, monitoring, and escalation of all project risks. This individual is the primary maintainer of the SharePoint Risk Register, receives immediate automated notifications for high-severity risk entries through Flow 6.2, and chairs the periodic risk review meetings. The Risk Manager reviews the Risk and Issue Management View in the Power Business Intelligence dashboard on a daily basis and is responsible for ensuring that all risk response actions are assigned, tracked, and completed within the defined timeframes.

Communications Manager

The Communications Manager is responsible for developing and executing the project communication plan defined in Section 9 of this Reference Guide, managing the onboarding of new stakeholders through the automated onboarding flow defined in Flow 6.6, and overseeing the content and distribution of all formal project communications. The Communications Manager works closely with Copilot to draft stakeholder communications, status reports, and project newsletters, and ensures that all communications are reviewed and approved before distribution.

Change Control Board Member

Change Control Board Members are senior representatives from the key project stakeholder groups who are collectively responsible for evaluating, deliberating upon, and rendering formal decisions on all change requests submitted to the project. Each Change Control Board Member participates in the automated digital voting process enabled by Flow 6.3, in which they receive a Teams adaptive card requesting their vote (Approve, Reject, or Defer) for each submitted change request. Change Control Board Members are expected to cast their votes within the timeframes defined in Section 11 of this Reference Guide.

Microsoft Power Platform Administrator

The Microsoft Power Platform Administrator is the technical specialist responsible for the configuration, deployment, maintenance, security, and governance of all Power Platform resources — including Power Automate flows, Power Business Intelligence workspaces and datasets, and Dataverse environments — used in support of this automated project management process. This individual is responsible for monitoring flow health, managing connector permissions, enforcing data loss prevention policies as defined in Section 14.5, and ensuring that all Power Platform resources comply with the organization's security and governance standards.

Microsoft Copilot Coordinator

The Microsoft Copilot Coordinator is responsible for the governance, configuration, and adoption of Copilot within the project management context. This individual maintains the approved prompt library defined in Appendix G, trains project personnel on effective and compliant use of Copilot, monitors Copilot usage for compliance with data privacy and data governance requirements defined in Section 5.8, and coordinates with the Microsoft Power Platform Administrator to ensure that Copilot's data grounding sources are accurate and appropriately permissioned.

Stakeholder Representative

Stakeholder Representatives are individuals who represent specific business units, customer groups, or functional areas that have a material interest in the outcome of the project. Stakeholder Representatives participate in formal review meetings, provide feedback on deliverables, and are engaged according to the stakeholder engagement strategy defined in Section 9.4. They are onboarded through the automated process defined in Flow 6.6 and receive communications tailored to their classification level and interests as documented in the Stakeholder Register.

Finance Controller

The Finance Controller is responsible for managing the project's financial controls, reviewing and approving budget expenditures, monitoring actual costs against the approved baseline, and receiving immediate automated alerts when budget variances exceed the thresholds defined in Flow 6.5. The Finance Controller reviews the budget-related data in the Power Business Intelligence dashboard, approves purchase orders and invoices through the automated procurement flow defined in Section 12.5, and provides financial reporting data to the Project Manager for inclusion in formal status reports.

Procurement Officer

The Procurement Officer is responsible for managing all vendor selection, contract execution, purchase order administration, and invoice processing activities associated with the project, as defined in Section 12 of this Reference Guide. This individual participates in the automated purchase order and invoice approval flows, maintains vendor performance data in the designated SharePoint list, and works with the Finance Controller to ensure that all procurement activities remain within approved financial thresholds and comply with organizational procurement policies.

2.2 RACI Matrix

The following RACI (Responsible, Accountable, Consulted, Informed) matrix defines the roles and responsibilities of each participant across the key deliverables and processes of this automated project management framework. The following codes apply throughout this matrix: R = Responsible (the individual who performs or leads the task), A = Accountable (the individual who is ultimately answerable for the correct and thorough completion of the task — there is only one Accountable party per row), C = Consulted (individuals whose input is sought; two-way communication), and I = Informed (individuals who are notified of outcomes; one-way communication).

Process / Deliverable	Exec Sponsor	Portfolio Mgr	Steering Cmte	PMO Director	Project Manager	Deputy PM	Bus. Analyst	Tech Lead	QA Manager	Risk Manager	Comms Manager	CCB Member	PP Admin	Finance Controller	Procurement Officer
Project Charter Approval	A	C	C	C	R	C	R	C	I	C	I	I	I	C	I
Project Management Plan	I	C	C	C	A	R	R	C	C	R	R	I	C	C	I
Risk Register Maintenance	I	I	I	I	A	C	C	C	C	R	I	I	I	I	I
Weekly Status Reporting	I	I	I	I	A	R	R	R	R	R	R	I	I	R	R
Change Request Processing	I	C	C	C	A	R	C	C	C	C	I	R	I	C	I
Budget Monitoring	I	I	I	I	A	C	I	I	I	I	I	I	I	R	R
Milestone Gate Review	C	I	R	C	A	R	C	C	R	C	I	I	I	I	I
Stakeholder Onboarding	I	I	I	I	A	C	I	I	I	I	R	I	C	I	I
Lessons Learned Facilitation	I	I	C	C	A	R	R	R	R	R	R	R	C	R	R
Project Closure and Archival	A	I	R	C	R	R	C	C	C	C	R	I	R	C	C

Process / Deliverable	Exec Sponsor	Portfolio Mgr	Steering Cmte	PMO Director	Project Manager	Deputy PM	Bus. Analyst	Tech Lead	QA Manager	Risk Manager	Comms Manager	CCB Member	PP Admin	Finance Controller	Procurement Officer
Power Platform Configuration	I	I	I	A	C	I	I	C	I	I	I	I	R	I	I
Quality Audit	I	I	I	C	A	C	C	C	R	C	I	I	I	I	I
Procurement and Vendor Mgmt	I	I	I	I	A	I	I	C	I	I	I	I	I	R	R

Section 3: Complete Project Charter

The Project Charter is the formal document that officially authorizes the existence of the project and grants the Project Manager the authority to apply organizational resources to project activities. The following template defines the complete and required structure of all Project Charters issued under this process. All fields are mandatory unless explicitly marked as optional. The Project Charter must be drafted by the Project Manager, reviewed by the Business Analyst and Risk Manager, and formally approved by the Executive Sponsor, Project Steering Committee, Project Management Office Director, and Project Manager prior to the commencement of any planning activities.

3.1 Project Title and Unique Identifier

The Project Title is the official designation of the project as recognized throughout all project documentation, reporting systems, and organizational communications. The title must be clear, descriptive, and approved by the Project Management Office. The Project Unique Identifier is a system-generated alphanumeric code assigned automatically by the Power Automate project intake flow upon formal submission of the Project Charter for approval. This identifier serves as the primary key linking all project records across SharePoint, Planner, Dataverse, and Power Business Intelligence.

Field	Value
Project Title	[Insert formal project title here]
Project Unique Identifier	[Auto-generated by Power Automate upon charter submission — e.g., PRJ-2026-0042]
Charter Version	[e.g., 1.0]
Charter Date	[Date of initial charter issuance]
Project Start Date (Proposed)	[Proposed commencement date]
Project End Date (Proposed)	[Proposed completion date]
Sponsoring Organization / Department	[Name of the organizational unit sponsoring the project]

3.2 Project Purpose and Business Justification

This section must articulate the strategic rationale for undertaking the project, the organizational problem or opportunity being addressed, and the expected contribution of the project to one or more organizational objectives or key performance indicators (quantifiable measurements of organizational performance against defined targets, hereinafter referred to as "key performance indicators"). The Business Justification must reference the specific business case or strategic plan from which the project is derived, and must explain why this project is the preferred solution over identified alternatives.

Field	Content
Business Problem or Opportunity Statement	[Describe in two to four sentences the specific problem or opportunity that this project addresses.]
Strategic Alignment	[Identify the organizational strategic goal, objective, or plan to which this project contributes.]
Expected Business Benefits	[List the quantified or qualifiable benefits expected upon project completion — e.g., cost reduction, revenue increase, compliance achievement, efficiency gain.]
Reference to Business Case or Strategic Plan	[Cite the document name, version, and date of the business case or plan that authorizes this project.]
Priority Classification	[High / Medium / Low — as assigned by the Portfolio Manager]

3.3 Project Objectives (SMART Format)

All project objectives must be written in Specific, Measurable, Achievable, Relevant, and Time-bound (hereinafter referred to as "SMART") format, in accordance with the Project Management Institute's guidance on defining project success criteria. Each objective must identify a specific, quantifiable outcome, the metric by which success will be measured, the evidence that the objective is realistically achievable within the project's constraints, the connection of the objective to a business benefit, and the specific date by which the objective must be achieved. The Project Manager, in collaboration with the Business Analyst and key stakeholders, is responsible for drafting and validating all project objectives.

Objective Number	Objective Statement	Metric	Target Value	Due Date	Strategic Linkage
OBJ-01	[State the first specific project objective in full, formal language.]	[Define the specific measure used to evaluate success.]	[State the quantified target value.]	[State the specific date by which this objective must be met.]	[Identify the organizational goal to which this objective contributes.]
OBJ-02	[State the second specific project objective.]	[Define the metric.]	[State the target value.]	[State the due date.]	[Identify the strategic linkage.]
OBJ-03	[State additional objectives as required.]	[Define the metric.]	[State the target value.]	[State the due date.]	[Identify the strategic linkage.]

3.4 Project Scope

3.4.1 In-Scope Items

The following items are formally included within the boundaries of this project and will be addressed through the project's Work Breakdown Structure, schedule, and budget. All in-scope items must be traceable to one or more project objectives defined in Section 3.3 above. The Project Manager is responsible for ensuring that the in-scope boundary is clearly communicated to all team members and stakeholders.

- [In-scope item 1: Describe in full what is included, referencing the relevant project objective.]
- [In-scope item 2: Describe in full what is included, referencing the relevant project objective.]
- [In-scope item 3: Describe in full what is included, referencing the relevant project objective.]
- [Add additional items as required.]

3.4.2 Out-of-Scope Items

The following items are formally excluded from the boundaries of this project and will not be addressed through the project's Work Breakdown Structure, schedule, or budget. Out-of-scope items are documented explicitly to prevent scope creep and to establish a clear baseline for change control purposes. Any request to include an out-of-scope item must be submitted as a formal change request through the process defined in Section 11 of this Reference Guide.

- [Out-of-scope item 1: Describe clearly what is excluded and, where possible, explain why.]
- [Out-of-scope item 2: Describe clearly what is excluded.]
- [Out-of-scope item 3: Describe clearly what is excluded.]
- [Add additional items as required.]

3.5 High-Level Deliverables and Milestones

The following table presents the high-level deliverables and key milestones of the project. This information is used to populate the initial project schedule in Microsoft Planner and the milestones view in the Power Business Intelligence dashboard. Each milestone represents a significant point in the project timeline and triggers the automated gate review process defined in Flow 6.4. All milestone dates are subject to revision through the formal change control process.

Milestone Number	Milestone / Deliverable Name	Description	Target Completion Date	Phase	Approver
MS-01	Project Charter Approved	The Project Charter has been formally signed by all required approvers and the project has been formally authorized.	[Date]	Initiating	Executive Sponsor
MS-02	Project Management Plan Approved	The comprehensive Project Management Plan, including all subsidiary plans, has been approved and baselined.	[Date]	Planning	Project Manager / PMO Director
MS-03	[Key Executing Milestone — e.g., Solution Design Complete]	[Describe the milestone deliverable and its significance.]	[Date]	Executing	[Responsible Approver]
MS-04	[Second Executing Milestone — e.g., User Acceptance Testing Complete]	[Describe the milestone deliverable and its significance.]	[Date]	Executing	[Responsible Approver]
MS-05	Project Formally Closed	All deliverables have been formally accepted, all contracts closed, lessons learned documented, and all project artifacts archived in accordance with Section 13 of this Reference Guide.	[Date]	Closing	Executive Sponsor

3.6 Assumptions, Constraints, and Dependencies

3.6.1 Assumptions

Assumptions are factors that are considered to be true, real, or certain for the purposes of project planning, without proof. All assumptions carry inherent risk; if an assumption proves to be false, the project may be materially impacted. The Project Manager is responsible for validating assumptions throughout the project lifecycle and escalating any assumption that is invalidated through the risk management process.

- [Assumption 1: State the assumption in full, formal language.]
- [Assumption 2: State the assumption in full, formal language.]
- [Add additional assumptions as required.]

3.6.2 Constraints

Constraints are binding limitations or restrictions that affect the planning and execution of the project. Constraints may relate to budget, schedule, resources, technology, regulatory requirements, or organizational policies. Unlike risks, constraints are known certainties that must be planned around rather than managed as probabilities.

- [Constraint 1: State the constraint clearly, specifying its nature and its impact on the project.]
- [Constraint 2: State the constraint clearly.]
- [Add additional constraints as required.]

3.6.3 Dependencies

Dependencies are relationships between this project and other projects, programs, organizational activities, or external events upon which the project's ability to proceed depends. Dependencies must be tracked in the project schedule and monitored regularly to detect changes that could affect the project timeline or scope.

- [Dependency 1: Describe the dependency, including the external project, event, or decision on which this project depends, and the nature and direction of the dependency.]
- [Dependency 2: Describe the dependency.]
- [Add additional dependencies as required.]

3.7 Risk Summary

This section provides a high-level summary of the most significant risks identified during the project initiation phase. A full risk assessment will be conducted during the planning phase, and all risks will be entered into the SharePoint Risk Register and actively monitored through the automated processes defined in Section 10 of this Reference Guide. The following table captures the initial risks identified at the time of charter development.

Risk Identifier	Risk Description	Probability (1-5)	Impact (1-5)	Severity Score	Proposed Response Strategy	Risk Owner
RSK-001	[Describe the risk in one to two sentences.]	[1-5]	[1-5]	[Probability × Impact]	[Avoid / Transfer / Mitigate / Accept / Escalate]	[Role Name]
RSK-002	[Describe the risk.]	[1-5]	[1-5]	[Score]	[Strategy]	[Role Name]
RSK-003	[Describe the risk.]	[1-5]	[1-5]	[Score]	[Strategy]	[Role Name]

3.8 Budget Authorization and Financial Thresholds

This section formally authorizes the initial budget allocation for the project and establishes the financial thresholds that govern automated alerts, escalation requirements, and approval authority levels. All expenditures must be approved in accordance with the authority matrix below and processed through the automated procurement flows defined in Section 12.5. Any expenditure that would cause the actual cost to exceed the approved budget by more than ten percent will trigger the automated budget variance alert defined in Flow 6.5.

Budget Category	Approved Amount (United States Dollars)	Approval Authority
Labor and Internal Resources	[Insert Amount]	Project Manager up to [threshold]; Finance Controller above
External Vendor and Contractor Services	[Insert Amount]	Procurement Officer and Finance Controller
Software Licenses and Technology	[Insert Amount]	Project Manager and Finance Controller
Training and Development	[Insert Amount]	Project Manager
Travel and Expenses	[Insert Amount]	Project Manager up to [threshold]; Finance Controller above
Contingency Reserve	[Insert Amount — typically 10–15% of total budget]	Project Manager with Finance Controller concurrence
Total Project Budget Authorization	[Insert Total Amount]	Executive Sponsor

3.9 Stakeholder Register (Initial)

The following table presents the initial Stakeholder Register as developed during the project initiation phase. The full Stakeholder Register will be maintained as a living document in SharePoint throughout the project lifecycle and will be updated as new stakeholders are identified or as existing stakeholders' engagement levels, interests, or influence change. New stakeholders added to this register will trigger the automated onboarding process defined in Flow 6.6.

Stakeholder Name	Role / Title	Organization	Classification	Interest Area	Influence Level	Current Engagement	Desired Engagement	Communication Preference
[Name]	[Role]	[Org]	[Internal / External]	[What they care about]	[High / Medium / Low]	[Unaware / Resistant / Neutral / Supportive / Leading]	[Target level]	[Email / Teams / Meeting]
[Name]	[Role]	[Org]	[Internal / External]	[Interest area]	[Influence]	[Engagement]	[Target]	[Preference]

3.10 Project Authority and Governance Structure

The governance structure for this project is defined in accordance with the roles and responsibilities established in Section 2 of this Reference Guide. The following table clarifies

the specific levels of decision-making authority applicable to this project. All decisions exceeding the Project Manager's authority must be escalated through the appropriate channel as defined in the escalation path outlined in Section 9.3 of this Reference Guide.

Decision Type	Decision Authority	Escalation Path if Required
Scope changes (minor — less than five percent of budget impact)	Project Manager	Project Management Office Director
Scope changes (moderate — five to fifteen percent of budget impact)	Change Control Board	Project Steering Committee
Scope changes (major — greater than fifteen percent of budget impact)	Executive Sponsor	Portfolio Manager
Budget expenditure within approved baseline	Finance Controller	Executive Sponsor
Schedule adjustments (less than ten business days)	Project Manager	Project Steering Committee
Vendor and contract decisions	Procurement Officer and Finance Controller	Executive Sponsor
Project termination or suspension	Executive Sponsor	Portfolio Manager

3.11 Sign-off and Approval Block

The formal execution of this Project Charter by the individuals identified below constitutes their official authorization of the project as described in this document and their agreement to provide the resources, governance, and support necessary for project success. Digital signatures collected through the automated approval flow in Microsoft Teams are legally equivalent to handwritten signatures for the purposes of this document.

Role	Printed Name	Signature	Date of Approval
Executive Sponsor			
Project Steering Committee Chairperson			
Project Management Office Director			
Project Manager			

Section 4: Project Management Institute Best Practice Workflow

This section describes the complete project management lifecycle as implemented under this Reference Guide, aligned to the Project Management Body of Knowledge Seventh Edition framework. The Project Management Body of Knowledge Seventh Edition defines project management through eight performance domains and twelve guiding principles, which together provide a comprehensive, flexible foundation for delivering value across diverse project environments. Each subsection below describes the entry criteria, key activities, responsible roles, deliverables, exit criteria, and quality gates applicable to each phase and performance domain.

4.1 Initiating Phase

Entry Criteria: A formal business case or strategic directive has been approved by the Portfolio Manager, and the project has been placed in the project intake queue on the Project Management Office SharePoint site. Sufficient budget authority exists to fund at minimum the planning phase, and an Executive Sponsor has been identified and has agreed to fulfill the role as defined in Section 2.1 of this Reference Guide.

Key Activities: During the Initiating Phase, the Project Manager drafts the Project Charter using the template defined in Section 3, leveraging Copilot to analyze stakeholder inputs, summarize the business case, and generate an initial risk register. The Business Analyst conducts stakeholder identification workshops, and the Risk Manager performs an initial risk screening. The Communications Manager develops the preliminary stakeholder register. The Power Automate project intake flow assigns the project its unique identifier and creates the project SharePoint site, Teams environment, and initial Planner board.

Responsible Roles: Executive Sponsor (accountable), Project Manager (responsible for charter), Business Analyst (responsible for stakeholder identification), Risk Manager (responsible for initial risk screening), Communications Manager (responsible for stakeholder register), Microsoft Power Platform Administrator (responsible for project site provisioning).

Deliverables Produced: Approved Project Charter, initial Stakeholder Register, initial Risk Register, provisioned SharePoint project site, provisioned Teams environment, provisioned Planner board.

Exit Criteria: The Project Charter has been formally approved and digitally signed by all parties identified in Section 3.11. The project unique identifier has been assigned and is active in the Project Registry SharePoint list. The project SharePoint site, Teams channels, and Planner board have been provisioned and are accessible to all assigned team members.

Quality Gate — Gate 1 (Charter Approval): The Quality Assurance Manager reviews the Project Charter against the mandatory template requirements defined in Section 3 and confirms that all mandatory fields are complete, all objectives are written in Specific, Measurable, Achievable, Relevant, Time-bound format, all required signatories have approved, and the project unique identifier has been properly registered. Gate 1 is formally passed only upon the Quality Assurance Manager's documented concurrence.

4.2 Planning Phase

Entry Criteria: Gate 1 has been formally passed. The approved Project Charter is accessible on the project SharePoint site. The Project Manager has been formally assigned and has accepted their role. The project Teams environment is active and all team members have been granted access.

Key Activities: The Planning Phase is the most documentation-intensive phase of the project lifecycle and results in the creation of the comprehensive Project Management Plan. During this phase, Copilot assists the Project Manager and Business Analyst in generating the Work Breakdown Structure, drafting the project schedule, producing the Communication Plan, and

structuring the Risk Management Plan. The Work Breakdown Structure is populated into Microsoft Planner as a structured task hierarchy. The project schedule is developed using rolling wave planning — a technique in which near-term work is planned in detail while future work is planned at a higher level, with detail added progressively as the project advances — to accommodate uncertainty in later phases. The Finance Controller reviews and baselines the budget plan, and the Risk Manager completes the full risk assessment for all identified risks.

Responsible Roles: Project Manager (accountable and responsible for Project Management Plan), Business Analyst (responsible for requirements documentation and Work Breakdown Structure), Risk Manager (responsible for Risk Management Plan), Quality Assurance Manager (responsible for Quality Management Plan), Communications Manager (responsible for Communication Plan), Finance Controller (responsible for budget baseline), Technical Lead and Solution Architect (responsible for technical approach documentation).

Deliverables Produced: Project Management Plan (inclusive of all subsidiary plans: Scope Management Plan, Schedule Management Plan, Cost Management Plan, Quality Management Plan, Resource Management Plan, Communication Plan, Risk Management Plan, Procurement Management Plan, Stakeholder Engagement Plan), Work Breakdown Structure, Project Schedule Baseline, Cost Baseline, Risk Register (full), Stakeholder Engagement Plan.

Exit Criteria: The Project Management Plan and all subsidiary plans have been reviewed by the Quality Assurance Manager, approved by the Project Manager, and endorsed by the Project Steering Committee. All baseline documents — schedule, cost, scope — have been locked in SharePoint and are protected against uncontrolled modification.

Quality Gate — Gate 2 (Planning Baseline Approval): The Quality Assurance Manager reviews all subsidiary plans for completeness against defined templates. The Project Management Office Director confirms alignment with organizational methodology standards. The Finance Controller confirms budget baseline accuracy. Only upon documented approval from all three reviewers does Gate 2 pass and execution activities commence.

4.3 Executing Phase

Entry Criteria: Gate 2 has been formally passed. All required resources — including personnel, technology licenses, and vendor contracts — have been confirmed as available and are ready to support the commencement of execution activities. The project schedule, as reflected in Microsoft Planner, is populated with all tasks and assignments for at minimum the first planning horizon.

Key Activities: During the Executing Phase, Project Team Members perform the work of the project as defined in the Work Breakdown Structure and tracked in Microsoft Planner. The Project Manager directs and manages project work, conducts regular team meetings in Teams, and uses Copilot to summarize meeting transcripts and extract action items for automatic creation in Planner. The Communications Manager executes the Communication Plan, including automated weekly status reports generated through the Power Automate flow defined in Section 6.1. The Quality Assurance Manager conducts ongoing quality assurance activities as defined in Section 8.2. The Risk Manager monitors the Risk Register and responds to automated alerts generated by Flow 6.2.

Responsible Roles: Project Manager (accountable), all Project Team Members (responsible for assigned tasks), Quality Assurance Manager (responsible for quality assurance), Risk Manager (responsible for risk monitoring), Communications Manager (responsible for communication execution), Deputy Project Manager (responsible for day-to-day administrative management).

Deliverables Produced: Completed Work Breakdown Structure deliverables (as defined in the project-specific Work Breakdown Structure), Quality Assurance audit reports, weekly Status Reports, meeting records and action item logs, updated Risk Register, updated Issue Log.

Exit Criteria: All Work Breakdown Structure deliverables for the Executing Phase have been completed, reviewed, and accepted by the designated approvers. All open issues and risks have been assessed and have active response plans. All milestone deliverables due within this phase have been completed and have passed Gate 3.

Quality Gate — Gate 3 (Executing Phase Milestones): For each milestone within the Executing Phase, the automated gate review process defined in Flow 6.4 is triggered. The Project Steering Committee reviews the gate review package and provides formal digital approval or rejection via Teams adaptive card. The Quality Assurance Manager must confirm the deliverable has passed all applicable quality control checks before the gate review package is transmitted to the Steering Committee.

4.4 Monitoring and Controlling Phase

Entry Criteria: The Executing Phase has commenced and project performance data is being generated. The Power Business Intelligence dashboard is populated with at minimum one full cycle of status data, and the project schedule and budget baselines are active and locked.

Key Activities: The Monitoring and Controlling Phase runs concurrently with the Executing Phase throughout the project lifecycle. The Project Manager and Deputy Project Manager review the Power Business Intelligence dashboard on a daily basis to monitor Schedule Performance Index (the ratio of Earned Value to Planned Value, indicating schedule efficiency, hereinafter referred to as the "Schedule Performance Index") and Cost Performance Index (the ratio of Earned Value to Actual Cost, indicating cost efficiency, hereinafter referred to as the "Cost Performance Index") trends. Copilot analyzes project performance data to identify variances and recommend corrective actions. Automated Power Automate flows alert the appropriate roles when thresholds are breached. The Change Control Board reviews and decides upon all submitted change requests through the automated process defined in Flow 6.3. The Risk Manager reviews and updates the Risk Register on a weekly basis.

Responsible Roles: Project Manager (accountable), Deputy Project Manager (responsible for daily monitoring), Risk Manager (responsible for risk monitoring), Finance Controller (responsible for budget monitoring), Quality Assurance Manager (responsible for quality control), Change Control Board (responsible for change decisions).

Deliverables Produced: Performance reports, Earned Value Analysis (a methodology that integrates scope, schedule, and cost performance data to provide a comprehensive picture of project performance, hereinafter referred to as "Earned Value Analysis") reports, corrective and preventive action records, approved or rejected Change Requests, updated project baselines (where changes are approved), variance analysis reports.

Exit Criteria: All project deliverables have been completed and accepted, all open Change Requests have been resolved, and the project is ready to transition to formal closure. The Schedule Performance Index and Cost Performance Index values are within acceptable thresholds, or documented corrective actions have been implemented and are producing the expected improvement.

Quality Gate — Gate 4 (Pre-Closing Readiness Review): The Project Manager, Quality Assurance Manager, and Finance Controller jointly confirm that all deliverables have been formally accepted, all change requests are closed, all invoices have been processed, and all outstanding risks and issues have been resolved or formally accepted. Only upon this joint confirmation does the project advance to the Closing Phase.

4.5 Closing Phase

Entry Criteria: Gate 4 has been formally passed. The customer or authorizing entity has formally accepted all project deliverables. The project status has been updated to "Closing" in the Project Registry SharePoint list, which triggers the automated Lessons Learned Collection Flow defined in Flow 6.7.

Key Activities: During the Closing Phase, the Project Manager coordinates the formal acceptance of all deliverables, closes all vendor contracts, facilitates the lessons learned process, and ensures the orderly transition of project outputs to the operations team. Copilot generates the draft lessons learned document and the project closure report based on the consolidated lessons learned survey responses and project performance data. All project documents are archived in the designated SharePoint archive folder. The project site is set to

read-only and remains accessible for reference purposes in accordance with the retention policy defined in Section 13.5.

Responsible Roles: Executive Sponsor (accountable for formal closure), Project Manager (responsible for closure activities), Procurement Officer (responsible for contract closeout), Communications Manager (responsible for final stakeholder communications), Microsoft Power Platform Administrator (responsible for archiving Power Platform resources).

Deliverables Produced: Final Project Closure Report, Lessons Learned Register, Benefits Realization Report, archived project document library, final Stakeholder Register, archived Planner board.

Exit Criteria: The Executive Sponsor has formally signed the Project Closure Report. All project documents are archived. All contracts are closed. The project status in the Project Registry has been updated to "Closed." Power Automate flows specific to this project have been deactivated by the Microsoft Power Platform Administrator.

Quality Gate — Gate 5 (Formal Project Closure): The Project Management Office Director reviews the Project Closure Report and Lessons Learned Register for completeness. The Finance Controller confirms all financial obligations have been settled. The Executive Sponsor provides final digital approval of the project closure. Only upon the Executive Sponsor's approval is the project formally closed.

4.6 Stakeholder Performance Domain

The Stakeholder Performance Domain encompasses all activities and functions associated with identifying, analyzing, and engaging project stakeholders effectively throughout the project lifecycle. Effective stakeholder engagement is a critical determinant of project success, as stakeholders who are insufficiently engaged or whose interests are inadequately addressed can withhold support, introduce obstacles, or actively oppose project activities. This domain recognizes that stakeholder engagement is not a one-time activity confined to the initiating phase but a continuous, adaptive process that evolves as stakeholder interests, influence levels, and engagement states change over time.

Under this automated project management process, stakeholder engagement activities are systematically supported through the automated onboarding flow defined in Flow 6.6, the communication delivery mechanisms defined in Section 9, and the Stakeholder Engagement Classification model defined in Section 9.4. The Communications Manager is the primary role responsible for this performance domain and works in conjunction with Copilot to draft tailored stakeholder communications that reflect the individual interests, influence levels, and preferred communication channels of each stakeholder. Stakeholder engagement assessments are conducted at each gate review and updated in the Stakeholder Register accordingly.

4.7 Team Performance Domain

The Team Performance Domain addresses the activities and functions associated with establishing an effective, collaborative, and high-performing project team. This domain encompasses team development from the initial forming of the team through the norming, performing, and adjourning stages described in Tuckman's model of team development. It includes establishing a shared team culture, clarifying individual roles and responsibilities, providing development opportunities, addressing performance issues, and managing conflict constructively and professionally.

Under this automated process, team health is monitored indirectly through the Resource and Team Utilization dashboard page in Power Business Intelligence, which tracks individual workload, utilization rates, and overtime alerts. The Project Manager uses this data to identify and address capacity imbalances, prevent burnout, and ensure equitable work distribution. Conflict resolution follows a structured escalation path: the Project Manager first attempts to resolve conflict through direct facilitation; if unresolved, the matter is escalated to the Project Steering Committee and, if necessary, to the Executive Sponsor for final resolution.

4.8 Development Approach and Life Cycle Performance Domain

The Development Approach and Life Cycle Performance Domain addresses the selection and tailoring of the project life cycle — predictive, agile, or hybrid — best suited to the nature, complexity, and uncertainty of the specific project. A predictive (also known as "waterfall") approach is appropriate for projects with well-defined, stable requirements, high certainty, and a clear understanding of the solution, where scope is defined comprehensively upfront and work proceeds sequentially through planned phases. An agile approach is appropriate for projects with high uncertainty, evolving requirements, or where early and continuous delivery of value is prioritized, using iterative cycles (called "sprints" or "iterations") of planning, execution, and review. A hybrid approach combines elements of both, typically using predictive methods for governance and overall schedule management while using agile methods for specific delivery components.

Under this Reference Guide, the development approach for each project is formally selected during the Initiating Phase and documented in the Project Charter. The choice of approach directly determines how the project schedule is structured in Microsoft Planner — sequentially for predictive approaches, or in sprint cycles for agile approaches — and how status reporting, milestone gates, and quality reviews are configured. The Microsoft Power Platform Administrator is responsible for configuring the appropriate Planner board structure and Power Automate flow triggers to reflect the chosen development approach.

4.9 Planning Performance Domain

The Planning Performance Domain addresses the activities and functions associated with the initial and ongoing organization, elaboration, and coordination of the work required to deliver the project's outcomes. Planning under the Project Management Body of Knowledge Seventh Edition is explicitly recognized as a continuous, iterative process rather than a single, front-loaded event. Rolling wave planning — the technique of planning near-term work in comprehensive detail while planning future work at a higher level of abstraction, progressively elaborating the plan as more information becomes available — is the preferred planning approach for all projects governed by this Reference Guide.

Under this automated process, planning activities are supported by Copilot's ability to generate initial Work Breakdown Structure drafts, project schedule structures, and communication plan templates based on the approved Project Charter and requirements documentation. These Copilot-generated drafts are reviewed, validated, and refined by the Project Manager and relevant subject matter experts before being approved and baselined. All planning artifacts are version-controlled in the project SharePoint document library, and any post-baseline changes must pass through the change control process defined in Section 11.

4.10 Project Work Performance Domain

The Project Work Performance Domain addresses the activities and functions associated with establishing project processes, managing the physical resources of the project, fostering a learning environment, and coordinating ongoing project work to produce the intended deliverables. This domain encompasses the day-to-day operational management of the project, including directing and managing project work, managing project knowledge, monitoring work performance, and implementing approved changes and corrective actions.

Under this automated process, the Project Work Performance Domain is supported by the weekly status collection flow defined in Flow 6.1, which ensures a consistent, automated mechanism for gathering work performance data from all Project Team Members. The action item tracking flow defined in Flow 6.8 ensures that all commitments made in project meetings are captured, assigned, and followed up automatically. The Project Manager reviews consolidated work performance data through the Power Business Intelligence Individual Project Health Dashboard each week and uses this data to make informed decisions about resource reallocation, scope prioritization, and corrective action implementation.

4.11 Delivery Performance Domain

The Delivery Performance Domain addresses the activities and functions associated with delivering the scope and quality of the project that meet stakeholder expectations and create the intended value. This domain emphasizes that delivery is not merely the production of outputs (tangible artifacts or products) but the creation of outcomes (changes in behavior or capability) and ultimately the realization of benefits (improvements to organizational performance) that justify the investment in the project. Effective delivery requires maintaining clear traceability from business objectives through deliverables to benefits throughout the project lifecycle.

Under this automated process, the Delivery Performance Domain is supported by the milestone gate review mechanism defined in Flow 6.4, which provides structured checkpoints at which the Project Steering Committee formally evaluates whether completed deliverables meet the acceptance criteria defined in the Project Charter and subsidiary plans. Deliverable acceptance records are stored in SharePoint and are incorporated into the Power Business Intelligence Work Breakdown Structure completion percentage metric. The Benefits Realization Report produced during the Closing Phase, as described in Section 13.4, formally documents the extent to which the intended benefits have been realized or are on track for realization post-project.

4.12 Measurement Performance Domain

The Measurement Performance Domain addresses the activities and functions associated with assessing project performance and implementing appropriate responses to maintain optimal performance. Effective measurement in the context of the Project Management Body of Knowledge Seventh Edition requires identifying the right metrics, collecting accurate and timely data, analyzing data to understand what is happening and why, communicating findings to the right audiences, and using insights to drive informed decisions and corrective actions. Measurement must be purposeful — metrics should be selected because they provide actionable insight, not merely because they are easy to collect.

The primary performance metrics used under this automated process are those of Earned Value Analysis, including Planned Value (the authorized budget assigned to work scheduled to be accomplished at a given point in time), Earned Value (the authorized budget associated with work that has actually been accomplished), Actual Cost (the realized cost incurred for work accomplished on the project), Schedule Variance (Earned Value minus Planned Value — a positive value indicates ahead of schedule; a negative value indicates behind schedule), Cost Variance (Earned Value minus Actual Cost — a positive value indicates under budget; a negative value indicates over budget), Schedule Performance Index, Cost Performance Index, Estimate at Completion (the expected total cost of completing all project work, calculated as Actual Cost plus the Estimate to Complete — the expected cost needed to finish all the remaining project work), and Variance at Completion (the difference between the Budget at Completion — the total approved budget for the project — and the Estimate at Completion). These metrics are calculated automatically by Power Business Intelligence from the data collected through the automated status collection and budget tracking flows and are displayed on the Individual Project Health Dashboard described in Section 7.3.

4.13 Uncertainty Performance Domain

The Uncertainty Performance Domain addresses the activities and functions associated with navigating risk, ambiguity, complexity, and volatility throughout the project lifecycle. The Project Management Body of Knowledge Seventh Edition defines uncertainty not merely as risk — the possibility of an event occurring that has an effect on the project — but as a broader category that includes ambiguity (the lack of clarity about requirements, solutions, or the project environment), complexity (the result of human behavior, system interactions, and ambiguity that make projects difficult to manage using linear, reductionist approaches), and volatility (the speed and unpredictability of change in the project environment).

Under this automated process, the Uncertainty Performance Domain is addressed through the comprehensive risk management framework defined in Section 10, the automated risk escalation flows defined in Flow 6.2, the real-time risk monitoring capabilities of the Power Business Intelligence Risk and Issue Management View, and the adaptive planning techniques

— including rolling wave planning and the maintenance of contingency reserves — embedded throughout this Reference Guide. The Risk Manager is the primary role responsible for this performance domain, supported by all Project Team Members who are required to log risks and issues as they are identified and to participate in periodic risk reviews.

4.14 The Twelve Guiding Principles of the Project Management Body of Knowledge Seventh Edition

The following twelve guiding principles, as established in the Project Management Body of Knowledge Seventh Edition, are embedded throughout all processes, governance structures, and automated workflows defined in this Reference Guide. Each principle is described below, along with an explanation of how it is operationalized within this automated project management process.

Principle 1: Be a Diligent, Respectful, and Caring Steward

This principle calls for project professionals to act as responsible stewards of organizational resources — including financial assets, human capital, technology, and environmental resources — by making decisions that reflect integrity, care, and trustworthiness. Stewardship extends beyond mere compliance with rules to an active commitment to the well-being of the team, the organization, and the broader community. Under this process, this principle is embedded in the mandatory financial threshold controls defined in Section 3.8, the ethical procurement standards defined in Section 12, the data governance requirements defined in Section 14.3, and the data loss prevention policies defined in Section 14.5, which together ensure that organizational resources are used responsibly and that all project decisions are made with transparency and accountability.

Principle 2: Create a Collaborative Project Team Environment

This principle recognizes that successful project outcomes depend on the ability of diverse project team members to collaborate effectively, share knowledge, and contribute their unique skills and perspectives toward common goals. A collaborative team environment is one in which psychological safety is maintained, communication is open and respectful, individual contributions are valued, and team members are empowered to make decisions within their areas of responsibility. Under this process, this principle is embedded in the structured Microsoft Teams channel environment defined in Section 9.5, the action item tracking flow defined in Flow 6.8 — which ensures that all team members' commitments are visible and respected — and the team utilization monitoring capabilities of the Power Business Intelligence dashboard defined in Section 7.3, which enables the Project Manager to identify and address capacity imbalances before they impair team health.

Principle 3: Effectively Engage with Stakeholders

This principle requires that project professionals proactively engage with all stakeholders — both those who may positively and negatively impact the project — to understand their interests, needs, and expectations, and to develop and execute strategies that build and maintain productive relationships throughout the project lifecycle. Stakeholder engagement is recognized as a continuous, adaptive activity rather than a one-time event. Under this process, this principle is operationalized through the automated stakeholder onboarding flow defined in Flow 6.6, the Communication Matrix defined in Section 9.1, the stakeholder engagement classification model defined in Section 9.4, and the Copilot-assisted communication drafting capabilities described in Section 5, which together ensure that stakeholder communications are timely, relevant, and appropriately tailored to each stakeholder's interests and preferred communication channels.

Principle 4: Focus on Value

This principle places the delivery of value — the net positive benefit realized by the organization as a result of the project — at the center of all project decision-making. Value may be financial, social, environmental, strategic, or operational in nature, and it must be defined, measured, and actively pursued throughout the project lifecycle, not merely assumed to materialize upon the completion of planned deliverables. Under this process, this principle is

embedded in the requirement that all project objectives be written in Specific, Measurable, Achievable, Relevant, and Time-bound format in Section 3.3 — ensuring that value is quantified and measurable — and in the Benefits Realization Report produced during project closure as described in Section 13.4, which formally documents the extent to which intended value has been delivered.

Principle 5: Recognize, Evaluate, and Respond to System Interactions

This principle acknowledges that projects do not exist in isolation but operate within complex organizational, technological, and environmental systems. Changes in one part of the system frequently produce intended and unintended effects in other parts. Project professionals must develop and maintain a systemic perspective — understanding how the project interacts with and is affected by its broader context — and must be prepared to recognize, evaluate, and respond to emergent system interactions as they arise. Under this process, this principle is embedded in the integration architecture overview defined in Section 1.3, which explicitly maps the interdependencies among all automated tools, and in the dependency management requirements defined in Section 3.6.3 of the Project Charter template, which ensure that cross-system dependencies are identified and monitored throughout the project lifecycle.

Principle 6: Demonstrate Leadership Behaviors

This principle holds that effective project management is fundamentally a leadership activity, and that all project participants — not only the Project Manager — are expected to demonstrate leadership behaviors appropriate to their roles. Leadership in the context of the Project Management Body of Knowledge Seventh Edition encompasses vision setting, motivation, influence, conflict resolution, decision-making, and the ability to adapt one's leadership style to the needs of the team and the demands of the situation. Under this process, this principle is embedded in the role definitions in Section 2, which explicitly describe the leadership responsibilities of each role, and in the escalation structures defined in Section 9.3, which ensure that leadership is exercised at the appropriate level when situations require decisions beyond the scope of individual roles.

Principle 7: Tailor Based on Context

This principle requires that project management approaches, tools, processes, and practices be intentionally selected and adapted to fit the unique characteristics of each project — including its size, complexity, uncertainty, stakeholder environment, regulatory context, and development approach — rather than applied as rigid, one-size-fits-all prescriptions. Tailoring must be thoughtful, deliberate, and documented. Under this process, this principle is embedded in the Development Approach and Life Cycle Performance Domain guidance in Section 4.8, which defines how the development approach is selected during initiation, and in the Microsoft Power Platform Administrator's responsibility to configure the Planner board structure, Power Automate flow triggers, and Power Business Intelligence data model to reflect the specific characteristics of each project.

Principle 8: Build Quality into Processes and Deliverables

This principle requires that quality be embedded into all project processes and deliverables from the outset, rather than inspected in after the fact. Quality is both a process characteristic — reflecting the degree to which project management activities are performed consistently, correctly, and in compliance with defined standards — and a product characteristic — reflecting the degree to which deliverables meet their defined acceptance criteria and stakeholder expectations. Under this process, this principle is embedded in the Quality Management Plan defined in Section 8, the quality gates defined at each phase in this section, the Quality Assurance Manager's role in reviewing all deliverables before milestone gate reviews, and the automated non-conformance tracking capabilities of the Power Business Intelligence dashboard.

Principle 9: Navigate Complexity

This principle recognizes that projects increasingly operate in complex environments characterized by numerous interacting variables, emergent behaviors, and unpredictable

outcomes that cannot be fully anticipated or controlled through traditional linear planning and management approaches. Navigating complexity requires continuous sensing of the project environment, adaptive planning, iterative learning, and willingness to adjust approaches when circumstances change. Under this process, this principle is embedded in the rolling wave planning technique prescribed in Section 4.9, the real-time performance monitoring capabilities of the Power Business Intelligence dashboard described in Section 7, and the Copilot-assisted anomaly detection and corrective action recommendation capabilities described in Section 5.4, which together enable the Project Manager to detect and respond to emergent complexities promptly and effectively.

Principle 10: Optimize Risk Responses

This principle requires that project professionals actively identify, assess, and respond to both threats (negative risks) and opportunities (positive risks) in a manner that optimizes overall project outcomes. Risk management must be proactive, ongoing, and integrated into all project decision-making activities, rather than treated as a periodic administrative exercise. Under this process, this principle is operationalized through the comprehensive Risk Management Framework defined in Section 10, the automated risk escalation flows defined in Flow 6.2, the Risk and Issue Management View in the Power Business Intelligence dashboard described in Section 7.3, and the automated risk digest notifications sent to the Risk Manager and Project Manager every Friday at 4:00 in the afternoon Eastern Daylight Time.

Principle 11: Embrace Adaptability and Resiliency

This principle calls for project professionals to build adaptability and resiliency into all aspects of the project, so that the project can absorb disruptions, adjust to changes in the environment, and continue to make progress toward its goals even when unexpected events occur. Adaptability refers to the capacity to respond effectively to change; resiliency refers to the capacity to recover from setbacks and continue functioning under stress. Under this process, this principle is embedded in the change control process defined in Section 11, which provides a structured but efficient mechanism for incorporating necessary changes into the project baseline; in the contingency reserve requirements defined in Section 3.8; and in the hybrid development approach option defined in Section 4.8, which enables teams to adopt iterative practices where they provide the greatest resilience benefit.

Principle 12: Enable Change to Achieve the Envisioned Future State

This principle recognizes that projects are fundamentally change initiatives, and that successful project delivery requires not only the technical completion of deliverables but also the active management of the organizational change that those deliverables create. Stakeholders must be prepared to adopt new ways of working, and the project team must actively support that adoption through communication, training, and engagement. Under this process, this principle is embedded in the Stakeholder Engagement Plan required as part of the Project Management Plan, the Communication Plan defined in Section 9, the formal transition to operations process defined in Section 13.6, and the Benefits Realization Report defined in Section 13.4, which collectively ensure that the project's outcomes are effectively embedded into the organization's ongoing operations and that the intended change is sustained beyond the project's formal closure.

Section 5: Microsoft Copilot Integration

Microsoft Copilot is an artificial intelligence assistant embedded throughout the Microsoft 365 and Power Platform ecosystems that leverages large language model technology — machine learning models trained on large volumes of text data to understand and generate human language — to assist project personnel with a wide range of cognitive tasks, including drafting, summarizing, analyzing, translating, and querying data. Copilot operates within the security and compliance boundary of the organization's Microsoft 365 tenant, meaning that all data processed by Copilot remains within the organization's data environment and is governed by the organization's data governance, data loss prevention, and access control policies. Copilot does not train its underlying language models on organizational data.

The use of Copilot under this Reference Guide is governed by the standards and requirements defined in Section 5.8. All Copilot-generated content is treated as a draft that requires human review, validation, and approval before it is used for any official project purpose. The Microsoft Copilot Coordinator is responsible for maintaining the approved prompt library defined in Appendix G and for training all project personnel in the effective and compliant use of Copilot.

5.1 Copilot in the Initiating Phase

During the Initiating Phase, Copilot is used primarily to accelerate the drafting of foundational project documents and to synthesize stakeholder input into structured, actionable formats. The Project Manager uses Copilot in Microsoft Word to generate an initial draft of the Project Charter based on the approved business case and the Project Charter template defined in Section 3. Copilot analyzes the business case document and prompts the Project Manager with questions to fill any identified gaps in the charter's mandatory fields, reducing the time required to produce a complete first draft from hours to minutes while ensuring comprehensive coverage of all required content areas.

Copilot in Microsoft Teams is used during the initial stakeholder identification workshops to generate real-time summaries of meeting discussions, capturing key stakeholder interests, concerns, and requirements as they are articulated. These summaries are saved to the project SharePoint site and reviewed by the Business Analyst for accuracy before being incorporated into the Stakeholder Register. Additionally, Copilot in SharePoint is used to generate an initial risk register by analyzing the Project Charter, business case, and any prior related project documentation, identifying potential risk themes and drafting initial risk descriptions for review by the Risk Manager. This Copilot-assisted risk identification process ensures that the initial risk register is comprehensive and that no major risk categories are overlooked.

5.2 Copilot in the Planning Phase

During the Planning Phase, Copilot's document generation capabilities are used extensively to produce the subsidiary plans that comprise the Project Management Plan. Using the approved Project Charter and requirements documentation as input, Copilot generates initial drafts of the Work Breakdown Structure, project schedule structure, Communication Plan, and Risk Management Plan. The Project Manager and relevant subject matter experts review, refine, and validate each of these Copilot-generated drafts before they are finalized and baselined. Copilot's ability to generate comprehensive first drafts significantly accelerates the planning process while ensuring that all mandatory plan components are addressed.

Copilot in Microsoft Planner — accessed through the Teams interface — assists the Project Manager in decomposing the Work Breakdown Structure into specific tasks, assigning estimated durations, identifying dependencies, and organizing tasks into a logical sequence. Copilot can also suggest resource assignments based on team member skill profiles documented in Dataverse. Additionally, Copilot generates the Communication Plan by analyzing the Stakeholder Register and proposing tailored communication strategies, frequencies, and channels for each stakeholder group, which the Communications Manager then refines to reflect organizational norms and stakeholder preferences.

5.3 Copilot in the Executing Phase

During the Executing Phase, Copilot's meeting intelligence capabilities — specifically, the ability to generate post-meeting summaries, extract action items, and identify key decisions from Microsoft Teams meeting transcripts — are among its most valuable and frequently used features. At the conclusion of every project meeting conducted in Teams, Copilot automatically generates a structured meeting summary that includes a brief narrative overview of the topics discussed, a bulleted list of all action items identified (with proposed owners and due dates), a list of decisions made, and a list of open questions requiring follow-up. The Project Manager reviews this summary for accuracy and, upon approval, it is saved to the project SharePoint site. The confirmed action items are then automatically created as tasks in Microsoft Planner through the action item tracking flow defined in Flow 6.8.

Copilot is also used during the Executing Phase to draft weekly project status reports. The Deputy Project Manager provides Copilot with the current week's status data — consolidated from the automated status collection flow defined in Flow 6.1 — and prompts Copilot to generate a formal, professional status report in the organization's standard format. Copilot produces a draft that includes narrative summaries of schedule status, budget status, risk status, and key accomplishments, which the Project Manager reviews and finalizes before distribution to stakeholders in accordance with the Communication Plan.

5.4 Copilot in the Monitoring and Controlling Phase

During the Monitoring and Controlling Phase, Copilot's data analysis capabilities — particularly its integration with Power Business Intelligence — are used to provide the Project Manager with intelligent, contextualized insights about project performance. Using natural language queries within Power Business Intelligence, the Project Manager can ask questions such as "Which tasks are most at risk of causing a schedule delay?" or "What is the projected Estimate at Completion if the current Cost Performance Index trend continues?" and receive immediate, data-grounded responses. Copilot in Power Business Intelligence analyzes the project's Earned Value Analysis metrics, schedule status, risk register, and budget actuals to generate these insights, and can automatically produce narrative explanations of anomalies or trends detected in the project data.

When the Power Business Intelligence dashboard or automated Power Automate flows identify a performance variance that exceeds defined thresholds, Copilot is used to assist the Project Manager in drafting corrective action recommendations. The Project Manager provides Copilot with the performance data and the nature of the variance, and Copilot generates a set of potential corrective actions, with pros and cons for each option, that the Project Manager can use as a starting point for decision-making. All Copilot-generated corrective action recommendations require human review and explicit approval before implementation.

5.5 Copilot in the Closing Phase

During the Closing Phase, Copilot's document generation capabilities are used to produce the project's closing documentation efficiently and comprehensively. Upon the triggering of the Lessons Learned Collection Flow defined in Flow 6.7, Copilot analyzes the consolidated lessons learned survey responses from all project participants and generates a structured, thematically organized lessons learned document that identifies recurring themes, highlights the most impactful lessons, and proposes specific process improvements for consideration in future projects. The Project Manager reviews this Copilot-generated document and adds their own qualitative assessment before it is finalized and stored in the Lessons Learned Register on SharePoint.

Copilot is also used to generate the Project Closure Report, which provides a comprehensive retrospective assessment of the project's performance against its original objectives, scope, schedule, budget, and quality targets. Copilot produces this report by analyzing the project's performance data from Power Business Intelligence, the approved Project Charter objectives, and the final status records in SharePoint. The Project Manager refines the Copilot-generated draft with qualitative context and lessons learned before presenting the final report to the Executive Sponsor for formal approval. Additionally, Copilot generates a summary of all formal

deliverable acceptance records, consolidated from the individual acceptance records stored in SharePoint throughout the project lifecycle, for inclusion in the closure documentation package.

5.6 Copilot in Microsoft Power Automate

Copilot in Power Automate enables the Microsoft Power Platform Administrator and project team members to create, describe, and troubleshoot automated workflows using natural language rather than requiring deep technical expertise in Power Automate's visual interface. Using the "Describe your flow" feature, an administrator can describe the desired automation behavior in plain English — for example, "When a new item is added to the Risk Register list in SharePoint, if the severity rating is four or five, send a Teams message to the Risk Manager and Project Manager" — and Copilot will generate a draft Power Automate flow implementing that behavior, which the administrator then reviews, validates, and refines before activating.

Additionally, Copilot in Power Automate is used to generate comprehensive documentation for each automated flow — including a plain-language description of the flow's purpose, trigger, logic, actions, and error handling behavior — which is stored in the Microsoft Power Platform Administrator's documentation library in SharePoint. This documentation is essential for the ongoing maintenance and governance of the automated flows and ensures that any authorized administrator can understand, modify, or troubleshoot any flow without relying on undocumented institutional knowledge. Copilot can also assist in diagnosing failed flow runs by analyzing error messages and run history logs and suggesting potential root causes and remediation steps.

5.7 Copilot in Microsoft Power Business Intelligence

Copilot in Power Business Intelligence provides project stakeholders with the ability to query project data using natural language, enabling individuals who are not trained in Power Business Intelligence report authoring to obtain specific data insights on demand without requiring the assistance of the Microsoft Power Platform Administrator or a report developer. For example, an Executive Sponsor can navigate to the Power Business Intelligence dashboard and ask "Show me all projects where the Cost Performance Index is below 0.9 and the projected completion date has slipped by more than thirty days" and receive an immediate, formatted answer derived from the project performance data model.

Copilot also generates automated narrative descriptions of dashboard pages — plain-language summaries of key findings, trends, and anomalies visible in the visual reports — that are updated each time the data model is refreshed. These narratives are particularly useful for stakeholders who consume reports in email distribution format rather than interactively through the Power Business Intelligence service, as they provide a concise, intelligible summary of the most important information without requiring the recipient to navigate the full visual dashboard. Additionally, Copilot in Power Business Intelligence supports automated anomaly detection — the identification of data points that deviate significantly from expected patterns or historical norms — and generates alerts when anomalies are detected in project performance data, which are routed to the appropriate role through the Power Automate notification flows.

5.8 Copilot Governance and Prompt Engineering Standards

The governance of Copilot usage within this automated project management process is the responsibility of the Microsoft Copilot Coordinator, in coordination with the Microsoft Power Platform Administrator. All project personnel who use Copilot are required to complete the Copilot onboarding training program administered by the Microsoft Copilot Coordinator before using Copilot for any project-related activity. This training covers the capabilities and limitations of Copilot, the approved use cases defined in the approved prompt library in Appendix G, data privacy and sensitivity requirements, and the mandatory human review requirement that applies to all Copilot-generated content.

The following governance standards apply to all Copilot usage under this Reference Guide:

- **Human Review Requirement:** All content generated by Copilot — including drafted documents, summaries, risk register entries, action items, and data analysis narratives — must be reviewed and approved by a qualified human reviewer before being used for any official project purpose, published to any SharePoint site, sent to any stakeholder, or recorded in any formal project record. The identity of the reviewing human and the date of their review must be documented.
- **Sensitive Data Prohibition:** Personnel must not input personally identifiable information (information that can be used to identify a specific individual, hereinafter referred to as "personally identifiable information"), protected health information, classified information, or any data subject to contractual or regulatory confidentiality restrictions into Copilot prompts without explicit authorization from the Data Governance Officer and the organization's Privacy Officer. The approved prompt library in Appendix G identifies which prompts involve sensitive data considerations.
- **Approved Prompt Library Requirement:** All Copilot prompts used for recurring, standardized project management activities — such as charter drafting, status report generation, lessons learned synthesis, and risk register generation — must be drawn from or modeled on the approved prompt library defined in Appendix G. Customizations to approved prompts are permitted, provided the customization does not introduce sensitive data inputs or deviate materially from the approved prompt's intended use case.
- **Attribution Requirement:** All Copilot-generated content incorporated into official project documents must be identified as having been produced with Copilot assistance in the document's revision history, in accordance with the organization's intellectual property and attribution policy.
- **Periodic Governance Review:** The Microsoft Copilot Coordinator will conduct a quarterly review of Copilot usage logs, approved prompt library currency, and compliance with data privacy requirements, and will report findings to the Project Management Office Director and the Data Governance Officer.

Section 6: Microsoft Power Automate Flows — Complete Specifications

The following subsections provide complete specifications for each automated flow deployed under this Reference Guide. Each flow specification includes the flow name, trigger, trigger source, conditions and logic branches, step-by-step actions, notifications and recipients, data written to Dataverse or SharePoint, error handling and retry logic, frequency of execution, and the responsible owner role. All flows are built, deployed, and maintained by the Microsoft Power Platform Administrator in the designated Power Automate environment for this process. All flows must be tested in a non-production environment before deployment to the production environment, and all flow documentation must be maintained current in the Microsoft Power Platform Administrator's documentation library on SharePoint.

6.1 Weekly Project Status Collection Flow

Attribute	Details
Flow Name	PMO-FLOW-001: Weekly Project Status Collection
Trigger	Scheduled recurrence — every Monday at 8:00 in the morning Eastern Time
Trigger Source	Power Automate Recurrence trigger (built-in connector)
Frequency	Weekly — every Monday; suspended during formally declared organizational holidays as maintained in the holiday exclusion list in SharePoint
Owner Role	Microsoft Power Platform Administrator; monitored by Deputy Project Manager

Conditions and Logic Branches:

- If the current date is listed in the Holiday Exclusion List in SharePoint, the flow terminates without sending notifications and logs a "Holiday Skip" record in the flow execution log in SharePoint.
- If a team member's account is listed as "On Leave" in the Team Status SharePoint list, the status request is not sent to that individual, and their response is automatically recorded as "Excused Absence."
- If a team member has not responded to the adaptive card within four hours of delivery, a reminder is sent via Teams direct message.
- If a team member has still not responded by 5:00 in the afternoon Eastern Time, an escalation notification is sent to the Project Manager via Teams.

Step-by-Step Actions:

1. The flow is triggered at 8:00 in the morning Eastern Time every Monday.
2. The flow queries the Project Registry SharePoint list to retrieve all projects with a status of "Active."
3. For each active project, the flow queries the Team Member Dimension table in Dataverse to retrieve the list of all active Project Team Members assigned to that project.
4. For each Project Team Member, the flow sends a personalized adaptive card via Teams containing the following fields, as defined in Appendix D: Task Identifier, Task Name, Percentage Complete (numeric entry), Blockers and Impediments (free-text entry), New Risks Identified (free-text entry), Hours Logged This Week (numeric entry), and overall Project Health Assessment (Red / Yellow / Green selection).
5. The adaptive card response data is captured and written to the Status Updates SharePoint list for the relevant project, with the following fields populated: Project Identifier, Team Member Name, Response Date and Time, all submitted response values, and a Response Status of "Submitted."

6. A scheduled check runs at 12:00 noon Eastern Time to identify all team members for whom no response has been recorded in the Status Updates list. For each non-respondent, the flow sends a reminder message via Teams direct message stating that their weekly status update is required by 5:00 in the afternoon Eastern Time.
7. A second scheduled check runs at 5:00 in the afternoon Eastern Time. All team members who have still not submitted a response are flagged as "Non-Respondent" in the Status Updates SharePoint list. The flow sends a Teams notification to the Project Manager listing all non-respondents and requesting that the Project Manager follow up directly.
8. Upon completion of all response collection activities, the Power Business Intelligence dataset for the project is refreshed via the Power Business Intelligence Application Programming Interface refresh endpoint, ensuring the dashboard reflects the most current data.
9. A flow execution summary — recording the total number of status requests sent, responses received, reminders sent, and escalations triggered — is written to the Flow Execution Log in SharePoint.

Notifications and Recipients: Initial adaptive card to all active Project Team Members (via Teams); reminder message at noon to non-respondents (via Teams); escalation notification at 5:00 in the afternoon to Project Manager (via Teams).

Data Written: Status Updates SharePoint list (one record per team member per project per week); Flow Execution Log in SharePoint.

Error Handling and Retry Logic: If a Teams adaptive card delivery fails for a specific user, the flow retries delivery three times at five-minute intervals. If delivery still fails after three retries, the flow logs an error record in the Flow Error Log in SharePoint and sends an alert to the Microsoft Power Platform Administrator via Teams. If the Power Business Intelligence dataset refresh fails, the flow retries twice at fifteen-minute intervals and, if unsuccessful, notifies the Microsoft Power Platform Administrator.

6.2 Risk and Issue Escalation Flow

Attribute	Details
Flow Name	PMO-FLOW-002: Risk and Issue Escalation
Trigger	When a new item is created in the Risk Register SharePoint list, OR when an existing item is modified to set the Severity Rating field to four or five
Trigger Source	SharePoint — "When an item is created or modified" connector
Frequency	Event-driven (real-time upon risk or issue submission or modification); also executes a weekly digest component every Friday at 4:00 in the afternoon Eastern Daylight Time
Owner Role	Microsoft Power Platform Administrator; monitored by Risk Manager

Conditions and Logic Branches:

- If the Severity Rating is one, two, or three: The flow logs the new risk to the Risk Register and notifies the Risk Manager by Teams message within one hour. No immediate escalation to the Project Manager is triggered.
- If the Severity Rating is four: The flow sends an immediate Teams notification to both the Risk Manager and the Project Manager. A task is created in the project's Microsoft Planner board with a due date of three business days from the date of risk submission.
- If the Severity Rating is five: All actions for a Severity Rating of four apply, plus the flow schedules an emergency risk review meeting in Microsoft Outlook calendar for the next available business day, inviting the Risk Manager, Project Manager, and relevant Subject Matter Experts as identified in the Risk Register entry.

Step-by-Step Actions:

10. The flow is triggered by the creation or modification of a Risk Register item in SharePoint.
11. The flow reads the Severity Rating field from the triggering item.

12. The flow evaluates the Severity Rating against the conditional logic branches defined above.
13. For Severity Ratings of four or five, the flow sends an immediate Teams notification to the Risk Manager and Project Manager, including the Risk Identifier, Risk Description, Probability rating, Impact rating, Severity Score, Proposed Response Strategy, and Risk Owner as recorded in the Risk Register entry.
14. For all Severity Ratings, the flow creates an action item task in the relevant project's Microsoft Planner board, assigned to the Risk Owner identified in the Risk Register entry, with the task name, due date, and a hyperlink to the Risk Register item in SharePoint.
15. For a Severity Rating of five, the flow calls the Microsoft Graph Application Programming Interface to create a calendar event in Microsoft Outlook for the next available business day, inviting all relevant parties.
16. Every Friday at 4:00 in the afternoon Eastern Daylight Time, the flow generates a summary digest of all new and modified risks added during the current week and sends this digest as a Teams channel message to the project's Risk and Issues channel, and as an email via Microsoft Outlook to the Risk Manager, Project Manager, and Deputy Project Manager.

Error Handling and Retry Logic: If any Teams notification action fails, the flow retries three times at two-minute intervals and, if unsuccessful, falls back to sending the notification via Microsoft Outlook email. If the Outlook calendar event creation via the Microsoft Graph Application Programming Interface fails, the flow sends a Teams alert to the Microsoft Power Platform Administrator and logs the failure in the Flow Error Log.

6.3 Change Control Board Approval Flow

Attribute	Details
Flow Name	PMO-FLOW-003: Change Control Board Approval
Trigger	When a Change Request form is submitted via Microsoft Forms
Trigger Source	Microsoft Forms — "When a new response is submitted" connector
Frequency	Event-driven (real-time upon form submission)
Owner Role	Microsoft Power Platform Administrator; monitored by Project Manager

Conditions and Logic Branches:

- If the Change Request classification is "Minor": The flow routes the request to the Project Manager only for a single-approver decision. No Change Control Board vote is required.
- If the Change Request classification is "Moderate" or "Major": The flow routes the request to all Change Control Board members for parallel voting. A majority vote (greater than fifty percent of voting members) determines the outcome.
- If the Change Request classification is "Emergency": The flow bypasses the standard Change Control Board voting process and routes the request directly to the Project Manager and Executive Sponsor for immediate joint decision, as defined in Section 11.6.
- If an approved majority vote is achieved: The flow updates the project schedule baseline and relevant SharePoint records.
- If the vote results in rejection or deferral: The flow notifies the Change Request submitter of the decision and the reasons recorded by the Change Control Board members.

Step-by-Step Actions:

17. The flow is triggered when a Change Request form is submitted in Microsoft Forms.
18. The flow retrieves the form response data, including the Change Request title, description, classification, impacted scope items, schedule impact (in business days), cost impact (in United States dollars), submitter name, and supporting rationale.

19. The flow generates a unique Change Request Identifier using a sequential numbering scheme (format: CRQ-[Year]-[Sequential Number], e.g., CRQ-2026-0017) and records the new Change Request in the Change Requests SharePoint list with a status of "Pending Review."
20. The flow sends a confirmation Teams message to the Change Request submitter acknowledging receipt and providing the Change Request Identifier.
21. Based on the Change Request classification, the flow applies the appropriate routing logic as defined in the Conditions section above.
22. For Moderate and Major classifications, the flow sends a Teams adaptive card to each Change Control Board member containing the full Change Request details and a three-option vote: Approve, Reject, or Defer. The adaptive card specifies the voting deadline (forty-eight hours from the time of card delivery).
23. The flow collects all votes received within the forty-eight-hour window and calculates the outcome based on majority vote rule. If fewer than fifty percent of Change Control Board members respond within the deadline, the flow escalates to the Project Manager to determine whether to extend the voting period or assign a default outcome.
24. The flow updates the Change Request record in the SharePoint Change Requests list with the vote tally, individual votes (for audit purposes), and the final decision (Approved, Rejected, or Deferred).
25. If the decision is "Approved," the flow sends a notification to all Project Team Members whose Planner tasks are impacted by the change, updates the relevant project schedule fields in SharePoint, and generates a Teams channel announcement in the project's General channel notifying all team members of the approved change.
26. If the decision is "Rejected" or "Deferred," the flow sends a Teams message and email notification to the submitter explaining the decision, including any comments recorded by the Change Control Board members.

Error Handling and Retry Logic: If an adaptive card delivery fails for a specific Change Control Board member, the flow falls back to sending the voting request via Microsoft Outlook email with a link to a dedicated voting form. All delivery failures are logged in the Flow Error Log in SharePoint.

6.4 Milestone Completion and Gate Review Flow

Attribute	Details
Flow Name	PMO-FLOW-004: Milestone Completion and Gate Review
Trigger	When a task marked as a "Milestone" in Microsoft Planner is set to 100% completion
Trigger Source	Microsoft Planner via Microsoft Graph Application Programming Interface — "When a task is completed" connector
Frequency	Event-driven (real-time upon milestone task completion)
Owner Role	Microsoft Power Platform Administrator; monitored by Project Manager

Step-by-Step Actions:

27. The flow is triggered when a Planner task labeled with the category tag "Milestone" is marked as complete by the assigned Project Team Member or Project Manager.
28. The flow retrieves the milestone details from the Planner task record via the Microsoft Graph Application Programming Interface, including milestone name, associated project identifier, completion date, and assigned team member.
29. The flow updates the Milestones SharePoint list for the relevant project, recording the milestone name, completion date, and completion status as "Completed — Pending Gate Review."
30. The flow compiles the gate review package by retrieving all relevant deliverable documents from the project SharePoint document library associated with the completed milestone, as

defined in the Milestone Deliverables mapping table maintained by the Project Manager in SharePoint.

31. The flow sends a Teams adaptive card notification to all Project Steering Committee members, attaching or linking to the gate review package documents, and requesting formal approval or rejection of the milestone via the adaptive card interface. The adaptive card specifies a seventy-two-hour review and response window.
32. Upon receipt of all Steering Committee responses (or upon expiration of the seventy-two-hour window), the flow calculates the majority decision. If a majority approves, the flow proceeds with the approval actions. If a majority rejects, the flow proceeds with the rejection actions.
33. If the milestone is approved: The flow updates the Milestones SharePoint list record to "Approved," unlocks the next phase's task assignments in Microsoft Planner by updating the tasks' start dates to the current date (or the next business day, if the approval occurs outside business hours), and sends a Teams channel announcement notifying all project team members that the milestone has been approved and the next phase has commenced.
34. If the milestone is rejected: The flow updates the Milestones SharePoint list record to "Rejected," creates a Corrective Action task in Microsoft Planner assigned to the Project Manager with a due date of five business days from rejection, and sends a Teams direct message to the Project Manager specifying the rejection reasons recorded by the Steering Committee members.

Error Handling and Retry Logic: If the Planner task completion event is not received within an expected window after a manual completion is reported, the Microsoft Power Platform Administrator should manually trigger the flow via the Power Automate portal. All adaptive card delivery failures fall back to Microsoft Outlook email notification, as described in Flow 6.3.

6.5 Budget Variance Alert Flow

Attribute	Details
Flow Name	PMO-FLOW-005: Budget Variance Alert
Trigger	When an item in the Financial Tracking SharePoint list is created or modified such that the "Actual Cost to Date" field value exceeds the "Planned Cost to Date" field value by more than ten percent
Trigger Source	SharePoint — "When an item is created or modified" connector with a conditional filter
Frequency	Event-driven (real-time upon financial data entry or modification); the financial data refresh from the organization's finance system occurs daily at midnight via the OData connector
Owner Role	Microsoft Power Platform Administrator; monitored by Finance Controller and Project Manager

Conditions and Logic Branches:

- If the actual cost variance is between ten percent and twenty-four-point-nine percent above the planned cost baseline: The flow sends an immediate alert to the Finance Controller and Project Manager and generates a Power Business Intelligence variance report export.
- If the actual cost variance is twenty-five percent or more above the planned cost baseline: All actions for the ten-to-twenty-four-point-nine percent threshold apply, plus the flow sends an immediate escalation notification to the Executive Sponsor via both Teams and Microsoft Outlook email.

Step-by-Step Actions:

35. The flow is triggered by the creation or modification of a Financial Tracking record in SharePoint.
36. The flow calculates the budget variance percentage using the formula: ((Actual Cost to Date minus Planned Cost to Date) divided by Planned Cost to Date) multiplied by one hundred.
37. If the variance percentage exceeds ten percent, the flow proceeds with alert actions.
38. The flow retrieves the relevant project information — including project name, project unique identifier, Project Manager name, current phase, and budget baseline details — from the

- Project Registry SharePoint list.
- 39. The flow sends an immediate Teams notification and Microsoft Outlook email to the Finance Controller and Project Manager, including the variance percentage, the monetary amount of the variance, the current actual cost to date, the planned cost to date, and the remaining budget available.
 - 40. The flow calls the Power Business Intelligence Application Programming Interface to trigger a refresh of the Budget Variance report and exports the refreshed report as a PDF (Portable Document Format) file, attaching it to the Microsoft Outlook email notification.
 - 41. If the variance percentage is twenty-five percent or more, the flow additionally sends an escalation notification to the Executive Sponsor via Teams and Microsoft Outlook email, including a summary of the variance, the potential impact on project completion, and a request for guidance on whether to apply contingency reserve funds.
 - 42. The flow records the alert event in the Budget Alert History SharePoint list, capturing the date and time of the alert, the variance percentage at the time of alert, the recipients notified, and the escalation level applied.

Error Handling and Retry Logic: If the Power Business Intelligence Application Programming Interface call fails, the flow retries twice at ten-minute intervals. If the report export still fails, the flow sends the notification without the attached report and includes a note directing recipients to access the dashboard directly. The failure is logged in the Flow Error Log.

6.6 New Stakeholder Onboarding Flow

Attribute	Details
Flow Name	PMO-FLOW-006: New Stakeholder Onboarding
Trigger	When a new item is created in the Stakeholder Register SharePoint list
Trigger Source	SharePoint — "When an item is created" connector
Frequency	Event-driven (real-time upon new stakeholder record creation)
Owner Role	Microsoft Power Platform Administrator; monitored by Communications Manager

Step-by-Step Actions:

- 43. The flow is triggered when a new stakeholder record is created in the Stakeholder Register SharePoint list by the Communications Manager or Project Manager.
- 44. The flow reads the stakeholder's name, email address, organization, stakeholder classification (Internal or External), and communication preference from the new SharePoint list item.
- 45. The flow retrieves the project overview document, Communication Plan, and reporting schedule from the project SharePoint document library.
- 46. The flow sends a formal welcome email via Microsoft Outlook to the new stakeholder, including: a personalized salutation, a brief introduction to the project (project name, purpose, and objectives), an attached copy of the Project Overview document, an attached copy of the applicable sections of the Communication Plan outlining how and how frequently they will receive project communications, and the name and contact information of the Communications Manager as the primary point of contact.
- 47. The flow grants appropriate SharePoint site permissions to the stakeholder's organizational account based on their stakeholder classification — Internal stakeholders receive "Read" access to the project SharePoint site; External stakeholders receive access only to the designated External Stakeholder document library, which contains publicly approved project documents.
- 48. The flow adds the stakeholder to the relevant project Teams channels based on their classification — all stakeholders are added to the "Announcements" channel; Internal stakeholders with a classification of "Supportive" or "Leading" are also added to the project's "General" channel.

- 49. The flow adds the stakeholder's email address to the relevant Microsoft Outlook distribution list for the project, ensuring they receive all broadcast email communications.
- 50. The flow creates a scheduled onboarding meeting in the Communications Manager's Microsoft Outlook calendar for the next available business day following the stakeholder's addition to the register, with the new stakeholder invited as a required attendee. The meeting invitation includes a standard agenda covering project overview, stakeholder role and expectations, and communication cadence.
- 51. A confirmation record is written to the Onboarding History SharePoint list, capturing the stakeholder name, onboarding date, permissions granted, channels added, and whether the welcome email was successfully delivered.

Error Handling and Retry Logic: If the permission assignment action fails (for example, due to the stakeholder's organizational account not being accessible in the tenant), the flow logs the failure and sends an alert to the Microsoft Power Platform Administrator and the Communications Manager to handle permission assignment manually. All email delivery failures are retried three times at five-minute intervals.

6.7 Lessons Learned Collection Flow (Project Closing)

Attribute	Details
Flow Name	PMO-FLOW-007: Lessons Learned Collection and Project Archival
Trigger	When the "Project Status" field in the Project Registry SharePoint list is modified to the value "Closing"
Trigger Source	SharePoint — "When an item is modified" connector with a conditional filter on the Project Status field
Frequency	Event-driven (triggered once per project upon transition to Closing status)
Owner Role	Microsoft Power Platform Administrator; monitored by Project Manager

Step-by-Step Actions:

- 52. The flow is triggered when the Project Manager updates the Project Status field in the Project Registry SharePoint list to "Closing."
- 53. The flow retrieves the complete list of all project participants — including Project Team Members, Subject Matter Experts, Stakeholder Representatives, and the Project Manager — from the Team Member Dimension table in Dataverse.
- 54. The flow sends a Microsoft Forms survey link via Microsoft Outlook email to all project participants, accompanied by a formal covering message from the Project Manager requesting their candid participation in the lessons learned process. The survey questions are as defined in Appendix E of this Reference Guide.
- 55. The flow sets a fourteen-calendar-day response window for the survey. A reminder email is sent to non-respondents at day seven via Microsoft Outlook.
- 56. Upon expiration of the fourteen-day window (or upon receipt of all expected responses, whichever occurs first), the flow retrieves all Microsoft Forms survey responses via the Forms connector.
- 57. The flow consolidates all survey responses into the Lessons Learned Register in SharePoint, organizing entries by project phase, category (People / Process / Technology / Communication), and sentiment (Positive Lesson — what worked well; Negative Lesson — what should be improved).
- 58. The flow triggers a Copilot-assisted summary generation process: it sends the consolidated response data to Copilot, using the approved prompt from Appendix G, requesting a structured, thematically organized lessons learned summary document. The generated document is saved as a draft in the project SharePoint document library, flagged for review by the Project Manager.
- 59. The flow initiates the document archival process: it copies all documents from the active project SharePoint document library to the designated archive folder within the Project

Management Office SharePoint archive site, maintaining the original folder structure.

Documents are tagged with the project unique identifier, project name, and archival date.

60. The flow sets the permissions on the active project SharePoint site to "Read Only" for all current members, preventing further modification of project records.
61. Upon completion of all archival actions, the flow sends a Teams notification to the Project Manager and Microsoft Power Platform Administrator confirming that the archival process is complete and providing a link to the archive location.
62. A completion record is written to the Project Closure Log in SharePoint, capturing the date and time of archival, the number of documents archived, the Lessons Learned Register entry count, and confirmation that all actions were completed successfully.

Error Handling and Retry Logic: If the document copy action fails for individual files, the flow logs the failed files in a "Archival Errors" SharePoint list and continues with the remaining files.

A summary of all archival errors is sent to the Microsoft Power Platform Administrator upon completion of the archival process for manual remediation. The flow does not set the site to read-only until all documents have been successfully archived or the archival error list has been reviewed and acknowledged by the Microsoft Power Platform Administrator.

6.8 Meeting Action Item Tracking Flow

Attribute	Details
Flow Name	PMO-FLOW-008: Meeting Action Item Tracking
Trigger	When a new Microsoft Teams meeting transcript file is saved to the designated "Meeting Transcripts" folder in the project SharePoint document library
Trigger Source	SharePoint — "When a file is created in a folder" connector; specifically monitoring the "Meeting Transcripts" document library folder
Frequency	Event-driven (triggered automatically after every Teams meeting for which transcription is enabled)
Owner Role	Microsoft Power Platform Administrator; monitored by Deputy Project Manager

Step-by-Step Actions:

63. The flow is triggered when a new meeting transcript file — in VTT (Web Video Text Tracks) or DOCX format as generated by Teams — is saved to the "Meeting Transcripts" folder in the project SharePoint document library. This occurs automatically when the Teams meeting organizer has enabled transcription for the meeting.
64. The flow reads the transcript file content and retrieves the associated meeting metadata — including meeting title, date and time, attendee list, and meeting organizer — from the Teams meeting record via the Microsoft Graph Application Programming Interface.
65. The flow submits the transcript content to Copilot using the approved action item extraction prompt from Appendix G, requesting that Copilot identify all action items, commitments, and follow-up tasks mentioned in the transcript. For each identified action item, Copilot returns the action item description, the name of the individual assigned to the action (as identified in the transcript), and the due date as stated in the meeting (if mentioned).
66. The flow reviews the Copilot output for completeness and, for any action items where the due date was not stated in the transcript, assigns a default due date of seven calendar days from the meeting date.
67. For each identified action item, the flow creates a task in the relevant project's Microsoft Planner board, assigned to the team member identified as the action item owner. The task title is the action item description, and the task notes field includes the meeting title, date, and a link to the transcript in SharePoint for reference.
68. The flow generates a post-meeting summary document using Copilot, including: the meeting title and date, a list of all attendees, a brief narrative summary of the topics discussed, a structured list of all decisions made, and a table of all action items with owners and due dates. This summary document is saved to the "Meeting Records" folder in the project SharePoint document library.

69. The flow sends the post-meeting summary to all meeting attendees via a Teams channel message in the project's meeting channel, with a link to the full summary document in SharePoint. For attendees who were invited but did not attend, the summary is also sent via Microsoft Outlook email.
70. The flow schedules a reminder notification: twenty-four hours before each action item's due date, the assigned Planner task owner receives a Teams direct message reminding them that their action item is due the following day, with the action item description and a link to the Planner task.
71. Upon completion of all actions, the flow writes a record to the Action Item Tracking Log in SharePoint, including the meeting identifier, the number of action items extracted, the number of Planner tasks created, and the date and time of processing.

Error Handling and Retry Logic: If Copilot fails to process the transcript (for example, due to the transcript file being too large or in an unrecognized format), the flow sends an alert to the Deputy Project Manager and Microsoft Power Platform Administrator, attaching the raw transcript file for manual review. If a Planner task creation fails for a specific action item, the flow retries three times and, if unsuccessful, logs the failed action item in the Action Item Error Log in SharePoint and notifies the Deputy Project Manager.

Section 7: Microsoft Power Business Intelligence Dashboard — Complete Specification

The Power Business Intelligence project management dashboard is the central performance visibility and analytical tool for this automated project management process. It provides role-appropriate visual representations of project and portfolio performance data, enabling all stakeholders — from Executive Sponsors reviewing portfolio health to Project Team Members checking task completion rates — to access the information they need in a timely, accurate, and comprehensible format. The dashboard is maintained by the Microsoft Power Platform Administrator and is accessible to authorized users through the Power Business Intelligence service, the Power Business Intelligence mobile application, and scheduled email subscription reports.

7.1 Data Sources and Connections

The Power Business Intelligence dashboard connects to the following data sources through certified Power Platform connectors, all of which are configured to use the organizational service accounts provisioned by the Microsoft Power Platform Administrator:

- **SharePoint Lists:** Project Registry (containing all project metadata), Risk Register (containing all risk records), Issue Log (containing all issue records), Status Updates (containing all weekly status submissions), Budget Tracking (containing all financial data), Change Requests (containing all change request records), Stakeholder Register (containing all stakeholder records), and Lessons Learned Register (containing all lessons learned records).
- **Microsoft Planner (via Microsoft Graph Application Programming Interface):** Task completion data, milestone status, and resource assignment information are retrieved from Planner through the certified Microsoft Graph Application Programming Interface connector.
- **Microsoft Dataverse (via Power Platform connector):** Team Member Dimension table, Risk Category Dimension table, Project Dimension table, and workflow state data maintained by Power Automate flows.
- **Finance System Data (via OData feed):** Actual cost data, purchase order data, and invoice data are retrieved from the organization's financial management system through an OData (Open Data Protocol — an open standard data access protocol) feed connection refreshed daily at midnight.
- **Microsoft Project Online (where applicable):** For projects using Microsoft Project Online for schedule management, the Project Online connector provides task and milestone data to supplement the Planner data model.

7.2 Data Model

The Power Business Intelligence data model follows a star schema — a relational data model structure in which a central fact table is surrounded by dimension tables, each connected to the fact table through a defined relationship — to optimize query performance and enable flexible, multi-dimensional analysis of project performance data. The following tables constitute the core data model:

7.2.1 Fact Tables

Fact Table Name	Grain (Level of Detail)	Key Measures
Status Updates Fact	One record per team member per project per week	Percentage Complete, Hours Logged, Risk Count Reported, Health Assessment Score
Budget Actuals Fact	One record per cost category per project per reporting period	Actual Cost, Planned Cost, Earned Value, Cost Variance, Cost Performance Index, Estimate at Completion, Variance at Completion
Task Completion Fact	One record per task per project per day (daily snapshot)	Tasks Planned, Tasks Completed, Tasks Overdue, Planned Value, Earned Value, Schedule Variance, Schedule Performance Index

Fact Table Name	Grain (Level of Detail)	Key Measures
Risk Events Fact	One record per risk event (creation or status change) per project	Probability Rating, Impact Rating, Severity Score, Days Open, Risk Status, Response Status

7.2.2 Dimension Tables

Dimension Table Name	Key Attributes	Source
Project Dimension	Project Identifier, Project Name, Phase, Status, Department, Priority, Start Date, End Date, Budget at Completion, Project Manager Name	SharePoint — Project Registry
Team Member Dimension	Member Identifier, Member Name, Role, Department, Skill Set Tags, Assigned Projects	Microsoft Dataverse — Team Member table
Date Dimension	Date, Day of Week, Week Number, Month, Quarter, Year, Is Business Day, Is Holiday	Generated by Power Query — M language script maintained by Microsoft Power Platform Administrator
Risk Category Dimension	Category Identifier, Category Name, Category Description, Parent Category	Microsoft Dataverse — Risk Category table

7.2.3 Relationships and Cardinality

The following key relationships are defined in the data model. All relationships use single-direction filters (from dimension to fact) to ensure predictable query behavior and prevent ambiguous cross-filter interactions. Bidirectional filtering is used only for the Date Dimension to Project Dimension relationship, which is required to support time intelligence calculations across the portfolio.

- Project Dimension (one) → Status Updates Fact (many): Cardinality is one-to-many, joined on Project Identifier.
- Project Dimension (one) → Budget Actuals Fact (many): Cardinality is one-to-many, joined on Project Identifier.
- Project Dimension (one) → Task Completion Fact (many): Cardinality is one-to-many, joined on Project Identifier.
- Project Dimension (one) → Risk Events Fact (many): Cardinality is one-to-many, joined on Project Identifier.
- Team Member Dimension (one) → Status Updates Fact (many): Cardinality is one-to-many, joined on Member Identifier.
- Date Dimension (one) → all Fact Tables (many): Cardinality is one-to-many, joined on Date field.
- Risk Category Dimension (one) → Risk Events Fact (many): Cardinality is one-to-many, joined on Category Identifier.

7.2.4 Data Refresh Schedule

The Power Business Intelligence dataset is configured with the following refresh schedule: Every two hours during business hours (from 7:00 in the morning Eastern Daylight Time to 7:00 in the evening Eastern Daylight Time, Monday through Friday); once daily at midnight Eastern Daylight Time for a full dataset refresh including the finance system OData feed. The Microsoft Power Platform Administrator monitors the data refresh history in the Power Business Intelligence service and is alerted by an automated flow if any scheduled refresh fails.

7.3 Dashboard Pages

Page 1: Executive Portfolio Overview

This page provides the Portfolio Manager, Executive Sponsor, and Project Management Office Director with a high-level view of the entire project portfolio's health, performance, and strategic alignment. It is designed to enable rapid identification of projects requiring executive attention without requiring the viewer to navigate into individual project details. The following visual elements are presented on this page:

- **Total Active Projects Card:** A single-number card visual displaying the count of all projects with a status of "Active" in the Project Registry, updated in real time with each data refresh.
- **Projects On Schedule versus Projects Delayed (Donut Chart):** A donut chart visual segmenting all active projects into "On Schedule" (Schedule Performance Index greater than or equal to 0.95), "At Risk" (Schedule Performance Index between 0.85 and 0.94), and "Delayed" (Schedule Performance Index below 0.85) categories, with each segment colored green, yellow, and red respectively.
- **Portfolio Budget versus Actual Spending (Clustered Bar Chart):** A clustered bar chart displaying the planned cost baseline versus actual cost to date for each active project, enabling quick visual identification of projects with significant cost variances.
- **Schedule Performance Index and Cost Performance Index Trend Lines:** Line charts displaying the weekly trend of the portfolio-average Schedule Performance Index and Cost Performance Index values over the trailing twelve weeks, enabling the identification of improving or deteriorating portfolio-wide performance trends.
- **Top Five Risks by Severity Heat Map:** A table visual formatted as a heat map, displaying the five highest-severity open risks across the portfolio, with cells color-coded by severity score (dark red for severity scores of twenty through twenty-five; orange for fifteen through nineteen; yellow for ten through fourteen).
- **Milestone Completion Timeline (Gantt-Style Visual):** A Gantt-style visual — a horizontal bar chart representing tasks or milestones on a timeline — displaying all portfolio milestones for the current quarter, color-coded by completion status (green for completed, blue for on track, red for overdue).
- **Page Slicers:** Date Range (selecting the analysis period), Department (filtering by sponsoring department), and Project Manager (filtering by assigned Project Manager).

Page 2: Individual Project Health Dashboard

This page provides the Project Manager, Deputy Project Manager, and Project Steering Committee with a comprehensive view of a single selected project's performance status. All visuals on this page are filtered to the project selected in the Project Name slicer at the top of the page. The following visual elements are presented:

- **Project Metadata Header:** A text visual displaying the project name, current phase, and a status badge — color-coded green (on track), yellow (at risk), or red (in trouble) — based on the overall health assessment derived from the Schedule Performance Index, Cost Performance Index, and risk severity scores.
- **Work Breakdown Structure Completion Percentage (Progress Bar):** A progress bar visual displaying the percentage of Work Breakdown Structure tasks marked as complete in Microsoft Planner, compared to the percentage that should be complete based on the current date and the project schedule baseline.
- **Budget Burn Rate Chart (Area Chart):** An area chart displaying the cumulative actual cost curve versus the cumulative planned cost curve and the earned value curve over time, providing a visual representation of cost performance trends.
- **Risk and Issue Count by Category (Clustered Bar Chart):** A clustered bar chart displaying the count of open risks and open issues grouped by risk category, enabling the Project Manager to identify which areas of the project carry the greatest risk exposure.
- **Team Member Utilization Gauge:** A gauge visual displaying the average utilization rate of all Project Team Members assigned to the selected project, with threshold markers at eighty percent (optimal) and one hundred percent (over-capacity).
- **Recent Status Update Feed:** A table visual displaying the five most recent weekly status update records for the selected project, including the submission date, reporting team member, overall health assessment, and any blockers reported.
- **Earned Value Analysis Section:** A structured table displaying the current values of all core Earned Value Analysis metrics: Planned Value (the authorized budget assigned to work

scheduled to be accomplished), Earned Value (the authorized budget associated with work actually accomplished), Actual Cost (the realized cost incurred for work accomplished), Schedule Variance (Earned Value minus Planned Value), Cost Variance (Earned Value minus Actual Cost), Schedule Performance Index, Cost Performance Index, Estimate at Completion (the expected total cost to complete all project work), Estimate to Complete (the expected cost to finish all remaining project work), and Variance at Completion (Budget at Completion minus Estimate at Completion).

Page 3: Risk and Issue Management View

This page provides the Risk Manager, Project Manager, and Quality Assurance Manager with a comprehensive view of all risks and issues affecting the selected project or portfolio. It is designed to support the daily risk monitoring activities required by this Reference Guide and to facilitate the preparation of the weekly risk digest distributed through Flow 6.2.

- **Risk Matrix (Bubble Chart):** A bubble chart plotting each open risk on a probability (vertical axis, scale of one to five) versus impact (horizontal axis, scale of one to five) grid. Each bubble represents one risk; bubble size represents the number of days the risk has been open; bubble color represents the risk category. Clicking on a bubble filters the remaining visuals on the page to that specific risk.
- **Open Risks by Category and Owner (Stacked Bar Chart):** A stacked bar chart displaying the count of open risks grouped by risk category, with each bar subdivided by the Risk Owner role, enabling quick identification of which roles are carrying the greatest risk ownership burden.
- **Issue Aging Chart (Scatter Plot):** A scatter plot displaying each open issue as a point, with the horizontal axis representing the number of days the issue has been open and the vertical axis representing the issue's severity rating. A vertical reference line at thirty days highlights issues that have been open for more than one month and require escalation attention.
- **Risk Trend Over Time (Line Chart):** A line chart displaying the weekly count of open high-severity risks (severity score of fifteen or above) over the trailing twelve weeks, enabling the identification of whether the project's overall risk exposure is increasing, decreasing, or stable.
- **Issues Requiring Escalation (Highlighted Table):** A table visual displaying all open issues that meet the escalation criteria defined in Section 9.3 — specifically, issues that have been open for more than fifteen business days without a recorded remediation action — with conditional formatting highlighting these records in red.

Page 4: Resource and Team Utilization

This page provides the Project Manager, Deputy Project Manager, and Portfolio Manager with a comprehensive view of team member workload, capacity, and utilization across all active projects. It is designed to support proactive capacity management and to enable early identification of over-allocation and under-utilization conditions.

- **Team Member Workload by Project (Stacked Bar Chart):** A stacked bar chart displaying the total estimated hours of active tasks assigned to each team member, subdivided by project. Each bar is color-coded by project for easy visual differentiation. A horizontal reference line at forty hours per week indicates the standard full-time capacity threshold.
- **Capacity versus Demand Gap Chart (Line and Clustered Column Chart):** A combination chart displaying, for each week in the project schedule horizon, the total available team capacity (line) versus the total estimated work demand (columns), enabling the identification of future periods of over- or under-capacity.
- **Utilization by Skill Set (Treemap):** A treemap visual — a space-filling visualization in which each category is represented by a rectangle proportional in size to the value being measured — displaying the distribution of team utilization across different skill categories, enabling the identification of skill areas that are in high demand or that have available capacity.
- **Overtime Alerts (Conditionally Formatted Table):** A table displaying all team members whose logged hours for the current week exceed forty hours, sorted in descending order by hours logged, with rows color-coded red for greater than fifty hours, orange for forty-five to fifty hours, and yellow for forty to forty-five hours.

Page 5: Change Control Log

This page provides the Project Manager, Change Control Board members, and Project Steering Committee with a comprehensive view of all change requests submitted to the project, their current status, and the historical performance of the change control process. It enables the monitoring of change request volumes, cycle times, and cumulative impact on the project baseline.

- **Change Request Volume by Status (Donut Chart):** A donut chart displaying the total count of change requests segmented by status — Approved, Pending, Rejected, and Deferred — providing a quick overview of the change control pipeline's current state.
- **Average Cycle Time for Change Approval (Card Visual):** A single-number card displaying the average number of calendar days from the submission of a change request to the recording of a final decision, calculated across all resolved change requests on the selected project.
- **Change Impact by Cost and Schedule (Scatter Plot):** A scatter plot displaying each approved change request as a point, with the horizontal axis representing the cumulative schedule impact (in business days) and the vertical axis representing the cumulative cost impact (in United States dollars). This visual enables the assessment of the total cumulative impact that approved changes have had on the project baseline.
- **Full Change Log Table with Drill-Through:** A table displaying all change requests for the selected project, including Change Request Identifier, title, submitter name, submission date, classification, schedule impact, cost impact, current status, and decision date. Clicking on any row in the table activates a drill-through navigation to a detail page showing the full Change Request record, including all vote records and Change Control Board member comments.

Page 6: Lessons Learned Repository

This page provides the Project Management Office Director, Portfolio Manager, and all project personnel with access to the organizational lessons learned repository, enabling the systematic application of prior project experience to inform future project planning, risk management, and process improvement initiatives.

- **Lessons Learned by Phase and Category (Matrix Visual):** A matrix visual (analogous to a pivot table) displaying the count of lessons learned entries organized by project phase (rows) and category — People, Process, Technology, Communication — (columns), filterable by project and time period.
- **Word Cloud of Most Frequently Cited Improvement Themes (Custom Visual):** A word cloud custom visual displaying the most frequently occurring improvement-related keywords extracted from the lessons learned descriptions, with word size proportional to frequency of occurrence. This visual provides a quick, intuitive summary of the most common themes in the organizational lessons learned repository.
- **Completed versus Pending Lessons Learned Actions (Donut Chart):** A donut chart displaying the proportion of recommended lessons learned improvement actions that have been formally assigned, completed, or are still pending assignment, enabling the Project Management Office Director to assess the degree to which lessons learned insights are being actively applied.

7.4 Row-Level Security Configuration

Row-level security — a Power Business Intelligence feature that restricts which rows of data a given user is authorized to see based on their identity and role — is configured in the data model to ensure that project data is accessible only to authorized personnel. The following row-level security roles are defined in the Power Business Intelligence data model and assigned to organizational security groups by the Microsoft Power Platform Administrator:

- **Executive Portfolio Role:** Users in this role see data for all active projects across the organization. This role is assigned to the Executive Sponsor, Portfolio Manager, and Project Management Office Director.
- **Project Manager Role:** Users in this role see data only for the specific projects to which they are assigned as Project Manager or Deputy Project Manager in the Project Dimension table.

- This role is assigned to all Project Managers and Deputy Project Managers.
- **Project Team Member Role:** Users in this role see data only for the specific project to which they are assigned in the Team Member Dimension table, and only the task and status data relevant to their own assignments. Aggregate project performance data (Earned Value Analysis metrics, budget totals, risk severity scores) is visible but not filterable to individual team member data of other participants.
 - **Finance Role:** Users in this role see budget and cost data for all projects but are restricted from viewing task-level and team member-level data. This role is assigned to the Finance Controller and Procurement Officer.
 - **Risk Manager Role:** Users in this role see full risk and issue data for all projects but are restricted from viewing budget and team member utilization details of other roles. This role is assigned to the Risk Manager.

7.5 Automated Report Distribution

The Power Business Intelligence service's scheduled email subscription feature is configured to deliver formatted dashboard report snapshots to role-based distribution lists on the following schedule. All subscriptions are managed by the Microsoft Power Platform Administrator and are updated whenever changes to role assignments, stakeholder lists, or distribution list membership are made. Report snapshots are delivered as PDF attachments and include a direct link to the live dashboard for interactive exploration.

Report Name	Dashboard Page	Frequency	Delivery Time	Recipients
Executive Portfolio Weekly Digest	Page 1: Executive Portfolio Overview	Weekly — every Monday	7:00 in the morning Eastern Daylight Time	Executive Sponsors, Portfolio Managers, Project Management Office Director
Project Health Weekly Report	Page 2: Individual Project Health	Weekly — every Monday	8:00 in the morning Eastern Daylight Time	Project Manager, Deputy Project Manager, Project Steering Committee
Risk Digest	Page 3: Risk and Issue Management	Weekly — every Friday	4:00 in the afternoon Eastern Daylight Time	Risk Manager, Project Manager, Deputy Project Manager
Resource Utilization Report	Page 4: Resource and Team Utilization	Weekly — every Friday	5:00 in the afternoon Eastern Daylight Time	Project Manager, Deputy Project Manager, Portfolio Manager
Change Control Summary	Page 5: Change Control Log	Monthly — first Monday of each month	8:00 in the morning Eastern Daylight Time	Project Steering Committee, Change Control Board Members, Project Manager

7.6 Mobile Optimization and Power Business Intelligence Mobile Application

All dashboard pages are configured with mobile-optimized layouts using the Power Business Intelligence mobile layout editor, enabling authorized users to access project performance data through the Power Business Intelligence Mobile Application (the native mobile application for iOS and Android that provides access to Power Business Intelligence reports and dashboards) on smartphones and tablets. Mobile layouts are simplified versions of the desktop layouts, prioritizing the most critical visual elements — primarily card visuals, status badges, and the top-five risk table — for clear readability on small screens without requiring horizontal scrolling.

The Microsoft Power Platform Administrator is responsible for maintaining the mobile layouts and ensuring that they remain synchronized with any changes made to the desktop layouts during dashboard maintenance activities. All users who access the dashboard through the mobile application must complete the same authentication and row-level security controls as desktop users, ensuring consistent access governance regardless of device type. The organization's mobile device management policy governs the installation and use of the Power Business Intelligence Mobile Application on personal and organizational devices.

7.7 Natural Language Query Configuration

The Power Business Intelligence natural language query feature — also known as "Questions and Answers" — is configured for all dashboard pages to allow users to ask questions about

the project data in plain English and receive immediate visual or numerical answers. The Microsoft Power Platform Administrator has configured a library of pre-defined question-and-answer terms — synonyms, entity names, measure names, and common questions — to optimize the accuracy and relevance of natural language query results. Copilot's integration with the natural language query feature further enhances this capability by enabling more complex, context-aware queries that reference multiple data sources simultaneously. All natural language query sessions are subject to the same row-level security controls as the underlying data model, ensuring that users cannot access data beyond their authorized scope through natural language queries.

Section 8: Quality Management Plan

8.1 Quality Standards and References

The quality management approach for all projects governed by this Reference Guide is aligned with the following standards and references: the Project Management Body of Knowledge Seventh Edition (specifically the Delivery Performance Domain, which addresses the quality of outputs, outcomes, and benefits); the International Organization for Standardization 9001 (an internationally recognized standard for quality management systems, hereinafter referred to as "International Organization for Standardization 9001") where applicable to the organization's certified processes; and the organization's internal Quality Management Framework, maintained by the Quality Assurance Manager and accessible on the Project Management Office SharePoint site. In cases of conflict between these standards and the requirements of this Reference Guide, the organization's internal Quality Management Framework shall take precedence, unless the conflict pertains to a Project Management Institute standard, in which case the Project Management Institute standard shall prevail.

8.2 Quality Assurance Activities

Quality assurance activities are process-oriented activities performed to provide confidence that the project will satisfy the relevant quality standards. Under this Reference Guide, the following quality assurance activities are mandatory for all projects:

- **Process Compliance Audits:** The Quality Assurance Manager conducts a formal process compliance audit at the midpoint of each project phase, reviewing the project team's adherence to the processes defined in this Reference Guide, including status reporting, risk management, change control, and communication activities. Audit findings are documented in the Quality Audit Report in SharePoint and reviewed by the Project Manager within five business days of receipt.
- **Document Quality Reviews:** All formal project documents — including the Project Charter, Project Management Plan, status reports, risk register, and closure documentation — are reviewed by the Quality Assurance Manager for completeness, accuracy, and compliance with the templates defined in this Reference Guide and the appendices thereto before being formally approved or distributed.
- **Automated Process Monitoring:** The Power Business Intelligence dashboard's automated anomaly detection capability, described in Section 7.7, is used to monitor the quality of process execution by identifying patterns that deviate from defined standards — for example, consistently late status update submissions, unusually high rates of change request rejections, or unusually long mean time to close issues — and alerting the Project Manager and Quality Assurance Manager to these patterns for investigation.

8.3 Quality Control Activities

Quality control activities are product-oriented activities performed to identify defects in deliverables and take corrective action to ensure that deliverables meet their defined acceptance criteria. Under this Reference Guide, the following quality control activities are mandatory for all projects:

- **Deliverable Inspections:** All formal project deliverables must be formally inspected by the Quality Assurance Manager against the acceptance criteria defined in the relevant section of the Project Management Plan before being submitted for stakeholder approval at a milestone gate review. The inspection must be documented using the Deliverable Inspection Checklist template maintained by the Project Management Office on SharePoint.
- **Testing Activities:** For technical deliverables, the Quality Assurance Manager and Technical Lead and Solution Architect jointly define the testing strategy — including unit testing,

integration testing, user acceptance testing, and performance testing as appropriate — and the specific acceptance criteria for each test type. All testing activities and their results must be documented in the Test Results Log in SharePoint.

- **Defect Management:** All defects identified during deliverable inspections or testing activities are logged in the Issue Log in SharePoint with full traceability to the deliverable, the acceptance criterion that was not met, the severity of the defect, and the remediation action required. Defects with a severity rating of four or five on a five-point scale are automatically escalated to the Project Manager through the Risk and Issue Escalation Flow defined in Flow 6.2.

8.4 Quality Gates by Phase

Gate	Phase	Entry Conditions	Reviewer(s)	Exit Conditions
Gate 1	Initiating → Planning	Project Charter drafted and submitted for review	Quality Assurance Manager, Project Management Office Director, Executive Sponsor	All mandatory charter fields complete; all objectives in Specific, Measurable, Achievable, Relevant, Time-bound format; all required signatories obtained
Gate 2	Planning → Executing	All Project Management Plan subsidiary plans drafted and submitted for review	Quality Assurance Manager, Project Management Office Director, Finance Controller	All subsidiary plans complete; baselines approved and locked; all team resources confirmed
Gate 3	Executing — Milestone Reviews	Milestone task marked complete in Planner; gate review package compiled	Project Steering Committee (via automated adaptive card), Quality Assurance Manager	Majority Steering Committee approval; deliverable acceptance criteria met per inspection records
Gate 4	Monitoring and Controlling → Closing	All phase deliverables complete; all change requests resolved	Project Manager, Quality Assurance Manager, Finance Controller	All deliverables formally accepted; all contracts reviewed; all open issues resolved or formally accepted
Gate 5	Closing → Closed	Closure documentation package complete; lessons learned finalized	Project Management Office Director, Executive Sponsor	Project Closure Report formally approved; all documents archived; all Power Automate flows deactivated

8.5 Defect and Non-Conformance Management

A defect is a condition in which a deliverable fails to meet one or more of its defined acceptance criteria. A non-conformance is a condition in which a process activity fails to adhere to one or more of the standards or procedures defined in this Reference Guide or the organization's Quality Management Framework. Both defects and non-conformances are recorded in the Issue Log in SharePoint using the Non-Conformance Record template maintained by the Quality Assurance Manager. Each record must include: the identifier and description of the defect or non-conformance, the deliverable or process activity affected, the acceptance criterion or standard violated, the date of discovery, the severity rating, the assigned remediation owner, the required remediation due date, and the status of the remediation action.

For defects and non-conformances with a severity rating of four or five, the Risk and Issue Escalation Flow defined in Flow 6.2 automatically notifies the Project Manager and Quality Assurance Manager and creates a remediation task in Microsoft Planner. The Project Manager is responsible for ensuring that all defects and non-conformances are remediated within the timeframes defined in the Non-Conformance Record before the affected deliverable is resubmitted for approval or the project advances through its next quality gate. A pattern of recurring non-conformances in the same process area shall trigger a formal process improvement review led by the Quality Assurance Manager and the Project Management Office Director.

Section 9: Communication Plan

9.1 Communication Matrix

The following Communication Matrix defines every formal communication associated with this automated project management process, specifying the intended audience, message content, delivery frequency, communication channel, and responsible role for each communication type. All communications must be executed in accordance with this matrix unless formally amended through the change control process defined in Section 11.

Communication	Audience	Content	Frequency	Channel	Owner
Weekly Project Status Report	Project Steering Committee, Project Manager, Deputy Project Manager, Executive Sponsor	Schedule status, budget status, risk summary, key accomplishments, upcoming milestones, open issues	Weekly — every Monday by noon Eastern Daylight Time	Microsoft Outlook email, Teams channel post	Project Manager (assisted by Copilot)
Executive Portfolio Dashboard	Executive Sponsor, Portfolio Manager, Project Management Office Director	Portfolio-level Schedule Performance Index, Cost Performance Index, milestone status, top risks	Weekly — every Monday at 7:00 in the morning Eastern Daylight Time (automated)	Power Business Intelligence service, email subscription	Microsoft Power Platform Administrator (automated)
Risk Digest	Risk Manager, Project Manager, Deputy Project Manager	All new and modified risks from the past week, escalation status, risk response actions due	Weekly — every Friday at 4:00 in the afternoon Eastern Daylight Time (automated via Flow 6.2)	Teams channel message, Microsoft Outlook email	Flow 6.2 (automated), overseen by Risk Manager
Milestone Gate Review Notification	Project Steering Committee	Milestone name, deliverables completed, gate review package, request for formal approval	Event-driven (upon milestone completion)	Teams adaptive card (via Flow 6.4)	Flow 6.4 (automated), overseen by Project Manager
Change Request Decision Notification	Change Request submitter, all project team members, Project Steering Committee	Change Request Identifier, decision (Approved / Rejected / Deferred), vote tally, Change Control Board comments	Event-driven (upon Change Control Board decision)	Teams channel message, Microsoft Outlook email (via Flow 6.3)	Flow 6.3 (automated), overseen by Project Manager
Monthly Portfolio Review Briefing	Executive Sponsor, Portfolio Manager, Project Management Office Director, all Project Steering Committees	Monthly portfolio performance summary, key decisions required, strategic alignment review	Monthly — first Tuesday of each month	Teams meeting with screen share of Power Business Intelligence dashboard	Project Management Office Director
Post-Meeting Action Item Summary	All meeting attendees and invitees who did not attend	Meeting summary, decisions made, all action items with owners and due dates	Event-driven (within two hours of meeting conclusion)	Teams channel message, Microsoft Outlook email (via Flow 6.8)	Flow 6.8 (automated), reviewed by Deputy Project Manager
Budget Variance Alert	Finance Controller, Project Manager; Executive Sponsor if variance exceeds twenty-five percent	Variance percentage, monetary amount, current actual cost, planned cost baseline, contingency reserve status	Event-driven (when variance threshold is breached)	Teams notification, Microsoft Outlook email with Power Business Intelligence report attachment (via Flow 6.5)	Flow 6.5 (automated), monitored by Finance Controller
Project Closure Announcement	All project stakeholders and team members	Confirmation of formal project closure, summary of outcomes, reference to archived documentation, post-project contact information	Once — upon formal project closure	Microsoft Outlook email, Teams channel announcement	Communications Manager

9.2 Reporting Cadence

The following reporting cadence applies to all projects governed by this Reference Guide. Adherence to this cadence is monitored by the Deputy Project Manager, and any deviations — including late or missed reports — must be documented in the project issue log and remediated promptly. The automated flows defined in Section 6 enforce the cadence for all event-driven and scheduled automated communications.

- **Daily:** The Project Manager and Deputy Project Manager review the Power Business Intelligence Individual Project Health Dashboard each business day for schedule, cost, risk, and issue anomalies. No formal daily report is published unless a critical issue requiring immediate stakeholder notification is identified.
- **Weekly:** Weekly project status reports are published every Monday by noon Eastern Daylight Time. Risk digests are distributed every Friday at 4:00 in the afternoon Eastern Daylight Time. Power Business Intelligence dashboard email subscriptions are delivered as defined in Section 7.5.
- **Monthly:** The Portfolio Review Briefing is conducted on the first Tuesday of each month. The Change Control Summary Power Business Intelligence report subscription is delivered on the first Monday of each month.
- **Milestone-Based:** Gate review notifications are distributed immediately upon milestone completion through Flow 6.4. Milestone approval or rejection notifications are distributed within twenty-four hours of the gate review decision.

9.3 Escalation Path and Escalation Thresholds

The following escalation path defines the sequence of contacts and timeframes governing escalation of issues, risks, decisions, and performance variances that cannot be resolved at the current level of authority. Escalation is mandatory whenever the conditions defined in this table are met; failure to escalate in accordance with this path is a process non-conformance subject to the defect management procedure defined in Section 8.5.

Escalation Trigger	Initial Contact	Escalation Level 1	Escalation Level 2	Timeframe for Initial Escalation
Schedule Performance Index below 0.85 for two consecutive weeks	Project Manager	Project Steering Committee	Executive Sponsor	Within one business day of second consecutive week below threshold
Cost Performance Index below 0.85 for two consecutive weeks	Finance Controller, Project Manager	Project Steering Committee	Executive Sponsor	Within one business day of second consecutive week below threshold
Budget variance exceeding ten percent	Finance Controller, Project Manager (automated via Flow 6.5)	Project Steering Committee	Executive Sponsor	Immediate (automated); human response required within four hours
Risk with severity rating of five	Risk Manager, Project Manager (automated via Flow 6.2)	Project Steering Committee	Executive Sponsor	Immediate (automated); risk review meeting within one business day
Open issue unresolved for more than fifteen business days	Project Manager	Project Steering Committee	Executive Sponsor	Within two business days of the fifteen-day threshold being reached
Milestone delayed by more than ten business days from baseline	Project Manager	Project Steering Committee	Executive Sponsor	Within two business days of identifying the delay

9.4 Stakeholder Engagement Classification

All stakeholders identified in the Stakeholder Register are classified according to the engagement level model defined in the Project Management Body of Knowledge Seventh Edition. This classification is used to guide the development of tailored communication and engagement strategies for each stakeholder group. The five engagement levels are defined as follows:

- **Unaware:** The stakeholder is not aware of the project or its potential impact on them. Communication strategy: inform of project existence, purpose, and relevance to the stakeholder's interests through an introductory communication and follow-up meeting.
- **Resistant:** The stakeholder is aware of the project but is resistant to the change it represents. Communication strategy: engage actively through one-on-one meetings facilitated by the Communications Manager to understand and address specific concerns; involve in working groups where feasible to build ownership.
- **Neutral:** The stakeholder is aware of the project but is neither resistant nor actively supportive. Communication strategy: maintain regular informational communications to build

awareness and understanding; seek opportunities to highlight benefits relevant to the stakeholder's interests.

- **Supportive:** The stakeholder is aware of and supportive of the project. Communication strategy: leverage the stakeholder's support by inviting them to serve as internal advocates; keep them informed and engaged to sustain their support through regular, substantive communications.
- **Leading:** The stakeholder is actively engaged in ensuring the project succeeds. Communication strategy: involve in governance activities, gate reviews, and decision-making processes; provide full access to project performance information and recognize their leadership contribution formally.

Stakeholder engagement classifications are assessed by the Communications Manager at each gate review and updated in the Stakeholder Register accordingly. Changes in a stakeholder's classification that represent a deterioration (for example, from Supportive to Neutral, or from Neutral to Resistant) must trigger an immediate review of the communication strategy for that stakeholder and, if warranted, an escalation to the Project Manager for personal engagement.

9.5 Microsoft Teams Channel Structure for the Project

Each project governed by this Reference Guide is provisioned with a dedicated Microsoft Teams environment with the following standardized channel structure. This structure is created automatically by the project intake Power Automate flow upon charter approval and is maintained by the Microsoft Power Platform Administrator. All project team members and relevant stakeholders are added to the appropriate channels as defined by their role and classification.

Channel Name	Purpose	Members	Automated Flow Posts
General	Broad project announcements, general project communications, file sharing	All project team members, Internal Supportive and Leading stakeholders	Milestone approval announcements (Flow 6.4), Change Request decisions (Flow 6.3)
Status and Reporting	Weekly status update submissions, status reports, performance summaries	Project Manager, Deputy Project Manager, all Project Team Members	Weekly status adaptive card requests (Flow 6.1), reminder notifications (Flow 6.1)
Risk and Issues	Risk register updates, issue log updates, risk digest, escalation notifications	Project Manager, Deputy Project Manager, Risk Manager, Quality Assurance Manager	Risk escalation notifications (Flow 6.2), weekly risk digest (Flow 6.2)
Change Control	Change request submissions, voting communications, change control board discussions	Project Manager, Change Control Board Members, Technical Lead and Solution Architect	Change request voting adaptive cards (Flow 6.3)
Meeting Records	Post-meeting summaries, action item notifications, transcript storage links	All project team members	Post-meeting action item summaries (Flow 6.8)
Finance and Procurement	Budget tracking updates, purchase order notifications, invoice approvals	Project Manager, Finance Controller, Procurement Officer	Budget variance alerts (Flow 6.5)
Announcements (read-only)	Official project announcements to all stakeholders; posting restricted to Project Manager and Communications Manager	All project team members, all stakeholders (Internal and External)	Major milestone achievements, project closure announcement

Section 10: Risk Management Framework

10.1 Risk Identification Process

Risk identification is the systematic process of identifying and documenting all potential events or conditions that could positively or negatively affect the project's ability to achieve its objectives. Under this Reference Guide, risk identification is a continuous, organization-wide responsibility — not the exclusive domain of the Risk Manager — and all project personnel are expected to identify and log risks as they are encountered throughout the project lifecycle. New risks may be identified through formal risk workshops, structured stakeholder interviews, expert judgment sessions, analysis of historical project data in the Lessons Learned Repository accessible via the Power Business Intelligence Page 6 dashboard, and review of analogous project records.

The primary automated trigger for risk identification is the Risk and Issue Escalation Flow defined in Flow 6.2, which activates whenever a new risk record is created in the SharePoint Risk Register. Additionally, Copilot is used during the Initiating Phase to perform an automated initial risk screening of the Project Charter and business case, as described in Section 5.1, to ensure that no major risk categories are overlooked in the initial risk register. All newly identified risks must be entered into the SharePoint Risk Register within one business day of identification.

10.2 Risk Assessment: Probability and Impact Matrix

All identified risks are assessed on two dimensions: Probability (the likelihood that the risk event will occur) and Impact (the magnitude of the consequence to the project if the risk event occurs). Both dimensions are rated on a five-point ordinal scale as defined in the following tables. The Severity Score for each risk is calculated by multiplying the Probability rating by the Impact rating, yielding a score between one and twenty-five. The automated Risk and Issue Escalation Flow applies different routing and escalation actions based on the Severity Score as described in Flow 6.2.

Probability Rating	Description	Approximate Probability Range
1 — Very Low	The risk event is unlikely to occur during the project lifecycle.	Less than 10%
2 — Low	The risk event has a low but non-trivial probability of occurring.	10% to 30%
3 — Medium	The risk event has a moderate probability of occurring.	30% to 50%
4 — High	The risk event is more likely than not to occur.	50% to 70%
5 — Very High	The risk event is highly likely or almost certain to occur.	Greater than 70%

Impact Rating	Schedule Impact	Cost Impact	Quality Impact	Stakeholder Impact
1 — Negligible	Less than 1% schedule delay	Less than 1% cost increase	Minor rework; no deliverable impact	No stakeholder concern expected
2 — Minor	1%–5% schedule delay	1%–5% cost increase	Some rework; minor deliverable impact	Minor stakeholder concern
3 — Moderate	5%–10% schedule delay	5%–10% cost increase	Significant rework; deliverable quality affected	Moderate stakeholder concern; escalation possible
4 — Significant	10%–25% schedule delay	10%–25% cost increase	Major rework; deliverable acceptance at risk	Significant stakeholder concern; escalation required
5 — Critical	Greater than 25% schedule delay or project failure	Greater than 25% cost increase or budget exhaustion	Deliverable unacceptable; project objectives cannot be met	Major stakeholder impact; project viability at risk

The following five-by-five Risk Matrix summarizes the Severity Score ranges and their associated escalation classification:

Probability \ Impact	1 — Negligible	2 — Minor	3 — Moderate	4 — Significant	5 — Critical
5 — Very High	5	10	15	20	25
4 — High	4	8	12	16	20
3 — Medium	3	6	9	12	15
2 — Low	2	4	6	8	10
1 — Very Low	1	2	3	4	5

Color Key: Green (1-4) = Low; Yellow (5-9) = Moderate; Orange (10-14) = High; Red (15-19) = Very High; Dark Red (20-25) = Critical

10.3 Risk Response Strategies

For each identified risk, the Risk Manager and Project Manager must define and document an appropriate risk response strategy in the Risk Register. The following five response strategies, aligned with the Project Management Body of Knowledge Seventh Edition's guidance on risk response planning, are available:

- **Avoid:** Changing the project plan to eliminate the risk or protect the project from its impact. Avoidance involves eliminating the root cause of the risk rather than merely reducing its probability or impact. Avoidance is most appropriate for risks with Critical severity scores (twenty to twenty-five) where the potential impact is unacceptable and where the necessary plan change is feasible within the project's constraints.
- **Transfer:** Shifting the financial consequence of the risk to a third party — typically through insurance, performance bonds, warranties, or fixed-price contracts with vendors — without eliminating the risk itself. Transference reduces the organization's financial exposure to the risk but does not prevent the risk event from occurring. It is most appropriate for financial risks that can be contractually assigned to another party.
- **Mitigate:** Reducing the probability of a risk occurring, reducing the impact of the risk if it does occur, or both. Mitigation actions must be specific, measurable, and achievable within the project's time and cost constraints. Mitigation is the most commonly applicable strategy and is appropriate for risks with Moderate, High, or Very High severity scores where the risk cannot be avoided or transferred.
- **Accept:** Acknowledging the risk and deciding to take no proactive action unless and until the risk event occurs (passive acceptance) or establishing a contingency plan and contingency reserve to be invoked if the risk materializes (active acceptance). Acceptance is appropriate for risks with Low severity scores (one to four) or for risks where no cost-effective response strategy is available.
- **Escalate:** Escalating the risk to a higher level of authority within or outside the organization when the risk is beyond the scope of the project manager's authority or when its impact would extend beyond the boundaries of the project. Escalated risks are reported to the Executive Sponsor or Portfolio Manager and are managed at the program or portfolio level rather than the project level.

10.4 Residual Risk Monitoring

Residual risks are risks that remain after the implementation of risk response strategies. Even after a risk response has been implemented, the underlying risk may not be fully eliminated, and the remaining probability and impact of the risk must be reassessed and continuously monitored. Residual risks are documented in the Risk Register alongside the original risk and its response strategy, and are assigned their own Residual Probability, Residual Impact, and Residual Severity Score. The Risk Manager reviews all residual risks on a weekly basis as part of the Risk Register maintenance activity and updates the residual ratings as new information becomes available. Residual risks with a Residual Severity Score of ten or above are reviewed by the Project Manager and are included in the weekly risk digest distributed through Flow 6.2.

10.5 Automated Risk Escalation Rules

The following automated risk escalation rules are implemented in the Risk and Issue Escalation Flow defined in Flow 6.2 and are enforced automatically by Power Automate without requiring manual intervention by the Risk Manager or Project Manager:

- Severity Rating of five on the Probability or Impact scale alone: The Risk Manager receives an automated Teams notification within thirty minutes of the risk record being created or modified. A Planner task is created for the Risk Manager with a due date of two business days.
- Severity Score of fifteen through nineteen (Very High): The Risk Manager and Project Manager both receive immediate Teams notifications. A Planner action item is created with a due date of three business days. The risk is included in the next weekly digest.
- Severity Score of twenty through twenty-five (Critical): All Very High escalation actions apply, plus an emergency risk review meeting is scheduled in Microsoft Outlook for the next available business day, and the Executive Sponsor is notified via Teams direct message.
- Any risk that remains open (status not set to Closed or Accepted) for more than thirty calendar days without a recorded response action: The Risk Manager and Project Manager receive an automated Teams reminder. The risk is highlighted in the Power Business Intelligence Risk and Issue Management View with a red "Stale Risk" indicator.

10.6 Risk Register Template

The following table defines all required fields in the SharePoint Risk Register list. The Microsoft Power Platform Administrator is responsible for ensuring that the SharePoint list is configured with all fields defined below and that all field types, validation rules, and automated flow triggers are correctly implemented. The blank Risk Register template for project use is provided in Appendix B of this Reference Guide.

Field Name	Data Type	Required	Description
Risk Identifier	Text (auto-generated)	Yes	Unique identifier in format RSK-[ProjectID]-[Sequential Number]
Project Identifier	Lookup (Project Registry)	Yes	The unique identifier of the associated project
Risk Title	Single line of text	Yes	A concise, descriptive title for the risk (maximum fifty characters)
Risk Description	Multiple lines of text	Yes	A complete description of the risk event and its potential cause and effect
Risk Category	Choice (lookup to Risk Category Dimension)	Yes	The category of the risk: Technical, Schedule, Financial, Resource, Stakeholder, External, Regulatory
Probability Rating (1-5)	Number	Yes	Assessed probability as per the five-point scale in Section 10.2
Impact Rating (1-5)	Number	Yes	Assessed impact as per the five-point scale in Section 10.2
Severity Score	Calculated (Probability × Impact)	Yes (auto-calculated)	Automatically calculated as Probability Rating multiplied by Impact Rating
Response Strategy	Choice	Yes	Avoid / Transfer / Mitigate / Accept / Escalate
Response Description	Multiple lines of text	Yes	Detailed description of the specific actions to be taken under the selected response strategy
Risk Owner	Person (lookup to organizational directory)	Yes	The individual responsible for executing the risk response and monitoring the risk
Risk Status	Choice	Yes	Open / In Progress / Accepted / Closed
Date Identified	Date	Yes	The date on which the risk was first identified and entered in the register
Target Resolution Date	Date	Yes	The date by which the risk response actions must be completed
Residual Probability (1-5)	Number	Yes (after response)	The probability of the risk occurring after the response strategy has been implemented
Residual Impact (1-5)	Number	Yes (after response)	The impact of the risk if it occurs after the response strategy has been implemented
Last Review Date	Date	Yes	The date of the most recent formal review of this risk record

Field Name	Data Type	Required	Description
Notes and History	Multiple lines of text (append-only)	No	A running log of notes, updates, and historical observations added by the Risk Manager over the life of the risk

Section 11: Change Control Process

11.1 Change Request Submission Procedure

Any project stakeholder — including Project Team Members, Subject Matter Experts, Stakeholder Representatives, or external parties — may submit a Change Request at any time during the project lifecycle by completing the Change Request Form in Microsoft Forms, the link to which is pinned in the project's Change Control Teams channel and is accessible from the project SharePoint site. The Change Request Form template is provided in Appendix C of this Reference Guide and includes all mandatory fields required for the Change Control Board to evaluate the request.

The submitter is responsible for providing a complete, accurate, and detailed description of the proposed change, including its rationale, the specific scope elements or baselines it would affect, and a preliminary estimate of its impact on the project schedule and budget.

Incomplete Change Request forms will be returned to the submitter by the Project Manager with a request for the missing information; the clock for the Change Control Board review period does not begin until a complete Change Request form has been received. All Change Request submissions trigger the automated Change Control Board Approval Flow defined in Flow 6.3.

11.2 Change Request Classification

All Change Requests are classified by the Project Manager upon receipt, based on the scope and magnitude of the proposed change. The classification determines the routing, approval authority, and timeline for the change control process:

Classification	Criteria	Approval Authority	Maximum Review Cycle Time
Minor	No impact on baseline scope, budget less than five percent of the budget baseline, schedule less than five business days' impact; administrative corrections only	Project Manager alone	Two business days
Moderate	Limited scope change; budget impact five to fifteen percent of baseline; schedule impact five to twenty business days	Change Control Board (majority vote)	Five business days
Major	Significant scope change; budget impact greater than fifteen percent of baseline; schedule impact greater than twenty business days; significant stakeholder impact	Change Control Board (majority vote) plus Executive Sponsor ratification	Ten business days
Emergency	Immediate action required to prevent imminent project failure, regulatory non-compliance, or irreversible harm; cannot wait for standard review cycle	Project Manager and Executive Sponsor jointly, with retrospective Change Control Board review within five business days	Twenty-four hours for initial approval; five business days for retrospective review

11.3 Change Control Board Composition and Voting Rules

The Change Control Board is composed of the following roles, as defined in Section 2.1 of this Reference Guide: the Project Manager (who serves as the non-voting Change Control Board Chair, responsible for presenting the Change Request package and facilitating the review process), a minimum of two and a maximum of five Change Control Board Members representing the key stakeholder groups, the Finance Controller (non-voting, providing financial impact analysis), and the Technical Lead and Solution Architect (non-voting for minor and moderate changes; voting member for major and technically complex changes). The Executive Sponsor participates in the Change Control Board review only for Major classification changes requiring Executive Sponsor ratification.

The voting rules for the Change Control Board are as follows: A quorum is established when at least two-thirds of the voting Change Control Board members have cast their votes within the defined review period. A majority vote — defined as more than fifty percent of votes cast — is required to approve a change request. If a quorum is not achieved within the review period,

the Project Manager may extend the voting period by an additional forty-eight hours, or may escalate to the Project Steering Committee for a decision. All votes are recorded in the Change Requests SharePoint list for audit purposes, regardless of whether the vote is cast via the Teams adaptive card or via the fallback Microsoft Outlook email voting mechanism.

11.4 Change Impact Assessment Procedure

Before transmitting a Change Request to the Change Control Board for voting, the Project Manager, supported by the Business Analyst, Technical Lead and Solution Architect, Finance Controller, and Risk Manager, must conduct a formal change impact assessment and document the results in the Change Request record in SharePoint. The change impact assessment must address all of the following dimensions:

- **Scope Impact:** Which Work Breakdown Structure components, deliverables, or acceptance criteria would be added, removed, or modified by this change?
- **Schedule Impact:** How many business days would the project completion date be advanced or delayed by this change? Which milestone dates, if any, would be affected?
- **Cost Impact:** What is the estimated incremental cost (or cost saving) associated with this change in United States dollars? What would be the new Estimate at Completion if the change is approved?
- **Quality Impact:** Would this change affect the defined acceptance criteria for any project deliverable? Would additional testing or quality assurance activities be required?
- **Risk Impact:** Does this change introduce new risks or modify the severity of existing risks in the Risk Register? If so, have these risks been logged and assessed?
- **Stakeholder Impact:** Which stakeholders would be affected by this change? How should they be notified and engaged regarding the change?
- **Resource Impact:** Does this change require additional personnel, skills, technology, or vendor resources not currently available to the project?

11.5 Change Implementation and Baseline Update Procedure

Upon formal approval of a Change Request by the appropriate authority, the Project Manager is responsible for implementing the approved change in an orderly and controlled manner. The following steps must be completed within five business days of the approval decision for all Minor and Moderate changes, and within ten business days for Major changes:

72. The Project Manager updates the relevant baseline documents — Project Schedule Baseline, Cost Baseline, and Scope Baseline — in SharePoint to reflect the approved change. The updated baseline documents must be version-controlled with a new version number and the Change Request Identifier recorded in the document revision history.
73. The Project Manager updates the Work Breakdown Structure and Microsoft Planner task board to reflect any new, modified, or removed tasks resulting from the approved change.
74. The Finance Controller updates the budget tracking records in SharePoint to reflect the approved cost impact of the change.
75. The Risk Manager reviews the risk register for any risks introduced or modified by the approved change and updates the Risk Register accordingly.
76. The Communications Manager distributes formal notification of the approved change to all affected stakeholders in accordance with the Communication Plan.
77. The Change Request record in the SharePoint Change Requests list is updated to a status of "Implemented" with the implementation date recorded.
78. The automated Power Automate flow defined in Flow 6.3 triggers a Power Business Intelligence dataset refresh to ensure the dashboard reflects the updated baselines.

11.6 Emergency Change Protocol

The Emergency Change Protocol applies when an immediate change is required to prevent imminent project failure, regulatory non-compliance, safety risk, or irreversible harm, and when the standard Change Control Board review cycle cannot be completed within the required timeframe. The following procedure governs Emergency Changes:

79. The Project Manager contacts the Executive Sponsor directly via Teams direct message or telephone to describe the nature and urgency of the required change and obtain verbal authorization to proceed.
80. The Project Manager submits the Emergency Change Request Form via Microsoft Forms, selecting "Emergency" as the classification. Flow 6.3 routes the request directly to the Project Manager and Executive Sponsor for immediate decision rather than to the Change Control Board.
81. Upon receipt of verbal authorization from the Executive Sponsor, the Project Manager may immediately implement the emergency change while simultaneously completing the formal documentation.
82. Within twenty-four hours of implementing the emergency change, the Project Manager must ensure that the formal Change Request Form is complete and has been digitally approved by both the Project Manager and the Executive Sponsor in the SharePoint system.
83. Within five business days of implementation, the Change Control Board conducts a retrospective review of the emergency change to assess its impact, confirm its appropriateness, and determine whether any further corrective actions are required. The retrospective review findings are documented in the Change Request record in SharePoint.
84. All Emergency Changes are subject to the same baseline update procedure defined in Section 11.5, which must be completed within three business days of the Executive Sponsor's formal digital approval.

Section 12: Procurement and Vendor Management

12.1 Procurement Planning

Procurement planning is the process of determining what project needs can best be met by acquiring products, services, or results from external sources, and documenting the approach to sourcing those external resources. During the Planning Phase, the Project Manager and Procurement Officer jointly develop the Procurement Management Plan — a subsidiary plan of the Project Management Plan — which documents all planned procurement activities, identifies the specific goods and services to be procured, defines the contract types and approval thresholds that will apply, and establishes the vendor performance monitoring approach that will be used throughout the project lifecycle.

The Procurement Management Plan must be reviewed and approved by the Finance Controller before it is incorporated into the Project Management Plan baseline. All planned procurements must be budgeted within the approved project budget defined in Section 3.8 of the Project Charter. Any procurement not anticipated in the Procurement Management Plan requires a Change Request submission in accordance with the process defined in Section 11 before a purchase commitment is made.

12.2 Vendor Selection Criteria

All vendor selection activities conducted under this Reference Guide must be governed by the organization's Procurement Policy and must apply objective, documented selection criteria. The following standard vendor selection criteria apply to all procurements unless the Procurement Officer documents a justified deviation in the Procurement Management Plan:

- **Technical Capability:** The vendor's demonstrated ability to deliver the required goods or services to the specified quality standards and acceptance criteria.
- **Experience and References:** The vendor's track record of delivering similar goods or services to organizations of comparable size and complexity, including verifiable references from prior engagements.
- **Financial Stability:** Evidence of the vendor's financial health and organizational stability, including financial statements or third-party credit assessments where appropriate.
- **Pricing and Value for Money:** The total cost of the vendor's offering relative to the value delivered, evaluated on a total cost of ownership basis rather than on initial price alone.
- **Compliance and Regulatory Standing:** The vendor's compliance with all applicable laws, regulations, and organizational policies, including data privacy, labor standards, and environmental requirements.
- **Delivery Schedule and Capacity:** The vendor's ability to deliver within the project's required timeframe and their demonstrated capacity to meet the project's volume and complexity requirements.

12.3 Contract Types and Approval Thresholds

The following contract types are available for use on projects governed by this Reference Guide, subject to the approval thresholds defined below. All contracts must be reviewed by the organization's Legal Counsel before execution and must be filed in the Contracts document library in the project SharePoint site upon execution.

Contract Type	Description	Best Used When	Approval Threshold
Fixed Price	A firm price is agreed for all work defined in the statement of work; cost risk is borne by the vendor	Scope is well-defined and stable; risk of scope change is low	Up to [threshold]: Procurement Officer; above: Finance Controller plus Executive Sponsor

Contract Type	Description	Best Used When	Approval Threshold
Time and Materials	Payment is based on actual labor hours at agreed rates plus actual material costs; cost risk is shared between the organization and the vendor	Scope is partially defined; flexibility in effort level is required	Procurement Officer plus Finance Controller for all Time and Materials contracts above a specified minimum value
Cost Plus Fixed Fee	The organization reimburses the vendor's actual allowable costs plus a fixed fee; cost risk is borne primarily by the organization	Scope is highly uncertain; work is primarily research or development in nature	Finance Controller plus Executive Sponsor for all Cost Plus contracts
Not to Exceed	A hybrid Time and Materials contract with a maximum ceiling price; cost risk is capped for the organization	Scope is partially uncertain but a maximum budget commitment is required	Same as Time and Materials

12.4 Vendor Performance Monitoring

Vendor performance is monitored on an ongoing basis throughout the contract period using a combination of automated Power Business Intelligence reporting and periodic formal performance review meetings. The Procurement Officer is responsible for entering vendor performance data — including delivery milestone completion, quality of deliverables received, responsiveness to issues, and compliance with contract terms — into the Vendor Performance SharePoint list on a monthly basis. This data is integrated into the Power Business Intelligence data model and is displayed on the Individual Project Health Dashboard in a dedicated vendor performance summary section.

Formal vendor performance review meetings are conducted by the Procurement Officer and Project Manager at monthly intervals for contracts exceeding a defined value threshold, and quarterly for smaller contracts. The outcomes of each performance review are documented in the Vendor Performance SharePoint list and any performance concerns are raised as issues in the Issue Log. If a vendor's performance consistently falls below the defined threshold — specifically, if the vendor receives a composite performance rating below three on a five-point scale for two consecutive monthly review periods — the Project Manager and Procurement Officer must initiate a formal vendor performance improvement process and notify the Finance Controller.

12.5 Purchase Order and Invoice Approval Flows

All purchase orders and vendor invoices are processed through an automated approval flow built in Power Automate. The flow is triggered when a purchase order is created or an invoice is submitted to the designated Finance document library in the project SharePoint site. The flow routes the purchase order or invoice to the appropriate approvers based on the monetary value and contract type, as defined in the approval threshold table in Section 12.3. Approvers receive a Teams adaptive card requesting their digital approval or rejection, with the option to include comments.

Upon approval, the flow records the approval in the Financial Tracking SharePoint list, updates the Budget Actuals data model for the Power Business Intelligence dashboard, and sends a confirmation notification to the Procurement Officer and Finance Controller. Upon rejection, the flow notifies the submitter with the rejection reason and creates an action item for the Procurement Officer to address the rejection condition. All purchase order and invoice records, including the complete approval audit trail, are archived in the Finance document library in SharePoint and retained in accordance with the document retention policy defined in Section 13.5.

Section 13: Project Closure and Archival Procedure

13.1 Formal Acceptance and Sign-Off Process

Formal project closure begins with the formal acceptance of all project deliverables by the authorized receiving party — typically the Executive Sponsor or the operational team inheriting the project's outputs. Formal acceptance is evidenced by the completion and digital signature of a Deliverable Acceptance Record for each major deliverable defined in the Project Charter and Project Management Plan. Deliverable Acceptance Records are stored in the Deliverable Acceptance document library in the project SharePoint site and are incorporated by reference into the Project Closure Report.

The Project Manager is responsible for ensuring that all Deliverable Acceptance Records are completed and signed before initiating the project closure activities. If a deliverable is not formally accepted — due to outstanding defects, non-conformances, or stakeholder disagreements — the issue must be resolved through the defect management process defined in Section 8.5 and the change control process defined in Section 11 before the project can advance to formal closure. The Project Manager updates the project status in the Project Registry SharePoint list to "Closing" only after all deliverables have been formally accepted, which triggers the Lessons Learned Collection Flow defined in Flow 6.7.

13.2 Contract Closeout

Contract closeout is the process of verifying that all work performed by vendors and contractors has been completed in accordance with the contract terms, all deliverables have been formally accepted, all invoices have been paid and reconciled, and all contractual obligations on both sides have been fulfilled. The Procurement Officer is responsible for coordinating the contract closeout process for all active contracts. For each contract, the Procurement Officer must complete a Contract Closeout Checklist — maintained in the Project Management Office's contract management document library on SharePoint — confirming that all specified conditions have been met.

Upon completion of the Contract Closeout Checklist, the Procurement Officer notifies the Finance Controller, who confirms that all final payments have been processed and that there are no outstanding financial obligations under the contract. The Finance Controller's confirmation, together with the completed Contract Closeout Checklist, constitutes the formal record of contract closeout and is filed in the Contracts document library in the project SharePoint site. The Procurement Officer sends a formal contract closeout notification to each vendor upon completion of their respective contract closeout process.

13.3 Lessons Learned Facilitation

The lessons learned process is a mandatory component of project closure for all projects governed by this Reference Guide, regardless of project size, duration, or outcome. Lessons learned are systematically collected through the automated survey process defined in Flow 6.7, analyzed by Copilot to identify recurring themes and improvement opportunities, and compiled into the Lessons Learned Register in SharePoint and the Lessons Learned Repository accessible through the Power Business Intelligence Page 6 dashboard. The Project Manager is responsible for facilitating a formal Lessons Learned Workshop — conducted via Teams — at which the project team reviews, discusses, and validates the Copilot-generated lessons learned summary before it is finalized.

Lessons learned identified during the project closure process must be categorized by project phase (Initiating, Planning, Executing, Monitoring and Controlling, or Closing) and by category (People, Process, Technology, or Communication). For each lesson identified, the Lessons Learned Register must capture: the lesson title, description, category, phase, the specific impact the lesson had on the project, the recommended improvement action for future

projects, the individual or role responsible for implementing the improvement, and the target implementation date. The Project Management Office Director is responsible for ensuring that high-priority lessons learned are reviewed during the quarterly Project Management Office process improvement review and are incorporated into future versions of this Reference Guide or the associated templates and training materials as appropriate.

13.4 Benefits Realization Measurement

Benefits realization measurement is the process of assessing the extent to which the benefits defined in the Project Charter and Business Case have been achieved as a result of the project. Benefits realization assessment is conducted during project closure and, for projects with benefits that materialize over an extended period post-closure (for example, cost savings or revenue growth), is conducted again at defined intervals after project closure — typically at six months and twelve months post-closure — in accordance with the Benefits Realization Plan developed during the Planning Phase.

The Project Manager, in coordination with the Finance Controller and the Executive Sponsor, completes the Benefits Realization Report template during the Closing Phase. The report assesses each benefit defined in Section 3.2 of the Project Charter against the specific metric and target value defined in Section 3.3, documenting the actual value achieved, the variance from the target, the explanation for any material variance, and any further actions required to realize the full intended benefit. For benefits that are expected to materialize post-closure, the Benefits Realization Report identifies the responsible operational role who will conduct the post-closure benefits tracking and the mechanisms — typically Power Business Intelligence reports connected to operational data systems — through which benefits will be measured and reported.

13.5 Document Archival and Retention Policy

All project documents — including the Project Charter, Project Management Plan and all subsidiary plans, risk register, issue log, change request records, meeting records, status reports, deliverable acceptance records, contract documents, lessons learned records, and the Project Closure Report — must be formally archived in the designated Project Archive folder within the Project Management Office SharePoint archive site upon project closure. The archival process is initiated automatically by the Lessons Learned Collection Flow defined in Flow 6.7 when the project status is set to "Closing." The Microsoft Power Platform Administrator is responsible for ensuring that the archive folder structure is correctly maintained and that all archived documents are properly indexed and searchable.

The following document retention periods apply to all archived project documents and are governed by the organization's Records Management Policy. These retention periods supersede any shorter document retention periods that may be specified in individual project plans:

Document Category	Minimum Retention Period	Retention Trigger
Project Charter and Business Case	Seven years	From date of formal project closure
Project Management Plan (all versions)	Seven years	From date of formal project closure
Financial records (budgets, actuals, invoices, purchase orders)	Seven years	From date of last transaction
Contract documents	Ten years	From contract expiration date
Deliverable Acceptance Records	Seven years	From date of formal project closure
Risk and Issue records	Five years	From date of formal project closure
Meeting records and transcripts	Three years	From date of meeting
Lessons Learned Register	Permanent (maintained in the organizational Lessons Learned Repository)	Not applicable
Project Closure Report	Seven years	From date of formal project closure

13.6 Transition to Operations

The transition of project outputs to the operational team responsible for their ongoing maintenance, use, and support is a critical final activity of the project lifecycle and must be formally planned and executed to ensure continuity of operations and the sustained realization of project benefits. The Project Manager, in coordination with the Technical Lead and Solution Architect and the relevant operational leadership, must develop a Transition Plan as a component of the Project Management Plan during the Planning Phase, specifying the activities, timeline, resource requirements, and acceptance criteria for the transition of each project deliverable to operations.

The Transition Plan must address, at minimum: the operational readiness criteria that must be met before the transition occurs; the training and knowledge transfer activities required to equip operational staff to manage and support the transitioned deliverables; the documentation — including user manuals, technical specifications, support procedures, and escalation paths — that must be completed and transferred to the operational team; the support model that will govern the project team's availability to assist the operational team during the transition period (typically thirty to ninety days post-closure, depending on the complexity of the deliverables); and the formal handover meeting or ceremony at which the Project Manager formally transfers ownership of all deliverables to the operational team leadership, with both parties signing the Transition Acceptance Record.

Section 14: Governance Framework and Compliance

14.1 Project Management Office Governance Model

The Project Management Office operates under a Controlling Project Management Office model — a Project Management Office governance structure in which the Project Management Office both provides project management support and enforces compliance with organizational project management standards, methodologies, and tools across all governed projects. In this model, the Project Management Office Director has the authority to audit project compliance with this Reference Guide, to require corrective actions when deviations are identified, and to recommend the suspension or termination of projects that persistently fail to meet governance requirements.

The Project Management Office conducts governance activities at three levels: project-level governance (through the quality gates, audits, and automated monitoring defined in this Reference Guide), portfolio-level governance (through the monthly Portfolio Review Briefing and the Power Business Intelligence Executive Portfolio Overview dashboard), and process-level governance (through the quarterly Process Improvement Review at which lessons learned from closed projects are evaluated for incorporation into this Reference Guide and associated standards). All Project Management Office governance activities are documented and maintained in the Project Management Office Governance Log in SharePoint.

14.2 Audit and Compliance Requirements

All projects governed by this Reference Guide are subject to periodic compliance audits conducted by the Project Management Office. The Project Management Office Director schedules at minimum one formal compliance audit for each active project per calendar quarter. The audit reviews the project's adherence to the processes, documentation standards, and automated workflow requirements defined in this Reference Guide and assesses whether the project's automated flows are operating correctly and producing accurate data for the Power Business Intelligence dashboard. Audit findings are classified as Critical (requiring remediation within five business days), Major (requiring remediation within fifteen business days), or Minor (requiring remediation within thirty business days) and are tracked in the Audit Findings SharePoint list until remediated and closed.

In addition to the Project Management Office compliance audits, projects may be subject to internal audit activities conducted by the organization's Internal Audit function, external audits conducted by regulatory bodies or certification authorities, and client audits where contractually required. The Project Manager is responsible for ensuring that all requested audit documentation is available and current in the project SharePoint site at all times, and for coordinating the project team's participation in any audit activities.

14.3 Data Governance for Microsoft Power Platform

All data created, processed, or stored within the Power Platform environment used by this automated project management process — including data in Power Automate flows, Power Business Intelligence datasets, Dataverse tables, and SharePoint lists — is subject to the organization's Data Governance Policy. The Microsoft Power Platform Administrator is responsible for ensuring that all Power Platform resources comply with the applicable data classification, access control, and data lifecycle management requirements defined in the Data Governance Policy.

Data classification for project management data follows the organization's standard data classification scheme: Public (information approved for unrestricted distribution), Public Edition (information intended for use by authorized employees and contractors), Confidential (information that could cause harm to the organization or individuals if disclosed), and Restricted (information subject to the highest level of access control and requiring explicit

approval for access). Most project management data falls within the Public Edition classification; financial data and personally identifiable information of project participants may fall within the Confidential classification and must be handled accordingly.

14.4 License and Access Management

Access to all Power Platform and Microsoft 365 resources used in this automated project management process is governed by the principle of least privilege — the principle that each user should be granted only the minimum level of access necessary to perform their defined role and responsibilities. The Microsoft Power Platform Administrator is responsible for maintaining the access control matrix for all Power Platform resources, ensuring that role assignments are current and accurate, and conducting a quarterly access review to identify and revoke any access that is no longer required.

The following license requirements apply to the automated project management process. The Microsoft Power Platform Administrator, in coordination with the organization's IT Licensing Manager, is responsible for ensuring that all required licenses are provisioned and maintained:

- **Microsoft Copilot License:** Required for all roles that use Copilot functionality — specifically, the Project Manager, Deputy Project Manager, Business Analyst, Communications Manager, Risk Manager, and Microsoft Copilot Coordinator, at minimum.
- **Microsoft Power Automate Per-User or Per-Flow License:** Required for the Microsoft Power Platform Administrator and for each automated flow that uses premium connectors. The specific license type is determined by the connector requirements of each flow as documented in the Flow Specifications in Section 6.
- **Microsoft Power Business Intelligence Pro or Premium License:** Required for all users who access the project management dashboard through the Power Business Intelligence service and who are not covered by a Premium capacity workspace allocation. All roles defined in Section 2 that interact with the Power Business Intelligence dashboard require at minimum a Power Business Intelligence Pro license.
- **Microsoft 365 E3 or E5 License:** Required for all project team members to access Teams, SharePoint, Outlook, Planner, and Forms. Roles that require advanced security and compliance features — specifically the Microsoft Power Platform Administrator and Microsoft Copilot Coordinator — require a Microsoft 365 E5 license or equivalent add-on licensing.

14.5 Data Loss Prevention Policies in Microsoft Power Automate

Data loss prevention policies — governance configurations within the Power Platform that restrict which connectors can be used together within a single Power Automate flow, thereby preventing the unintentional transfer of sensitive organizational data to unauthorized external services — are configured and maintained by the Microsoft Power Platform Administrator in the Power Platform Administration Center. These policies are a critical component of the organization's data security posture and must be reviewed and updated whenever new connectors are introduced into the automated project management environment or whenever the organization's data security requirements change.

The following data loss prevention policy rules apply to all Power Automate flows within the project management environment. These rules define which connectors are classified as "Business" (permitted for use with organizational data), "Non-Business" (permitted for personal or non-organizational use only), and "Blocked" (prohibited from use in any flow within the governed environment):

- **Business (Permitted) Connectors:** SharePoint, Microsoft Teams, Microsoft Outlook, Microsoft Planner, Microsoft Forms, Microsoft Graph Application Programming Interface (HTTP with Azure Active Directory — Microsoft's cloud-based identity and access management service), Dataverse, Power Business Intelligence, Microsoft Project Online, and all other Microsoft first-party connectors explicitly approved by the Microsoft Power Platform Administrator.
- **Non-Business (Restricted) Connectors:** Consumer social media connectors, personal email connectors, and any third-party connector not explicitly classified as Business. These

connectors may be permitted in non-production environments for testing purposes only, with explicit written authorization from the Project Management Office Director.

- **Blocked Connectors:** All connectors that would transmit organizational data to external, non-approved, or unknown endpoints. The blocked connector list is maintained by the Microsoft Power Platform Administrator and is updated at a minimum on a quarterly basis.

Any request to add a new connector to the Business (Permitted) category must be submitted to the Microsoft Power Platform Administrator as a formal connector approval request. The Microsoft Power Platform Administrator reviews the request with the Data Governance Officer and, if approved, updates the data loss prevention policy within ten business days of approval. All data loss prevention policy changes are logged in the Power Platform Governance Log in SharePoint.

Section 15: Glossary of Terms

The following alphabetical glossary defines all technical terms, acronyms, tool names, and specialized project management terminology used within this Reference Guide. Every acronym is listed with its full expansion. This glossary serves as the authoritative reference for all terminology used in this document and in all associated project management documentation produced under this Reference Guide.

Term or Acronym	Full Expansion (if acronym)	Definition
Acceptance Criteria	Not an acronym	The specific conditions or standards that a deliverable must meet in order to be formally accepted by the authorized receiving party. Acceptance criteria are defined in the Project Charter and subsidiary plans and are evaluated during quality control inspections and milestone gate reviews.
AC	Actual Cost	See "Actual Cost."
Actual Cost	Not an acronym	The realized cost incurred for work accomplished on the project during a specific time period. Actual Cost is one of the three core Earned Value Analysis parameters and is used to calculate Cost Variance and the Cost Performance Index. Abbreviated as "AC."
Adaptive Card	Not an acronym	A platform-agnostic UI (User Interface) snippet used within Microsoft Teams that allows automated flows to present interactive forms, approval requests, and information cards directly within the Teams interface, enabling users to respond to automated requests without leaving the Teams environment.
Agile	Not an acronym	An iterative and incremental approach to project management and product development that emphasizes flexibility, collaboration, continuous delivery of working increments, and rapid response to change. Agile is one of the three development approaches described in Section 4.8 of this Reference Guide.
API	Application Programming Interface	See "Application Programming Interface."
Application Programming Interface	Not an acronym	A defined set of rules, protocols, and tools that allows software applications to communicate with each other programmatically. In the context of this Reference Guide, the Microsoft Graph Application Programming Interface is used to enable Power Automate to interact with Microsoft Planner, Microsoft Teams, and Microsoft Outlook calendar data. Abbreviated as "API."
Artificial Intelligence	Not an acronym (commonly abbreviated "AI")	The simulation of human intelligence processes — including learning, reasoning, problem-solving, and language understanding — by computer systems. In the context of this Reference Guide, Artificial Intelligence refers specifically to the large language model technology underlying Microsoft Copilot. Commonly abbreviated as "AI."
BAC	Budget at Completion	See "Budget at Completion."
Budget at Completion	Not an acronym	The total approved budget for the project — the sum of all authorized budget amounts allocated to the project scope. Budget at Completion is used as the denominator in the calculation of the Variance at Completion. Abbreviated as "BAC."
Baseline	Not an acronym	An approved plan for the project — encompassing scope, schedule, and/or cost — against which project performance is measured and controlled. Baselines may only be changed through the formal change control process defined in Section 11 of this Reference Guide.
Benefits Realization	Not an acronym	The process of ensuring that the benefits defined in the Project Charter and Business Case are actually delivered and sustained following the project's completion. Benefits Realization measurement is a formal closing activity under this Reference Guide, as described in Section 13.4.
Business Analyst	Not an acronym	The project role responsible for eliciting, documenting, and validating business and functional requirements, and for translating organizational needs into actionable project scope. Fully defined in Section 2.1 of this Reference Guide.
CCB	Change Control Board	See "Change Control Board."
Change Control Board	Not an acronym	A formal governance body responsible for reviewing, evaluating, and rendering decisions on all change requests submitted to a project. The composition and voting rules of the Change Control Board are defined in Section 11.3 of this Reference Guide. Abbreviated as "CCB."
Change Request	Not an acronym	A formal document submitted through the Microsoft Forms Change Request Form requesting a modification to the project's approved scope, schedule, cost, or quality baseline. All Change Requests are processed through the automated Change Control Board Approval Flow defined in Flow 6.3 of this Reference Guide.
Complexity	Not an acronym	In the context of the Project Management Body of Knowledge Seventh Edition and the Uncertainty Performance Domain, complexity refers to the result of human behavior, system interactions, and ambiguity that make projects difficult to manage using linear or reductionist approaches. Complexity is one of four components of the Uncertainty Performance Domain.
Copilot	Not an acronym	Microsoft Copilot — the Artificial Intelligence assistant embedded throughout Microsoft 365 applications and the Power Platform that leverages large language model technology to assist project personnel with drafting, summarizing, analyzing, and querying data. Governance standards for Copilot use are defined in Section 5.8 of this Reference Guide.

Term or Acronym	Full Expansion (if acronym)	Definition
CPI	Cost Performance Index	See "Cost Performance Index."
Cost Performance Index	Not an acronym	The ratio of Earned Value to Actual Cost, calculated as Earned Value divided by Actual Cost. The Cost Performance Index indicates cost efficiency: a value greater than one indicates the project is delivering more value per dollar spent than planned (under budget); a value less than one indicates the project is delivering less value per dollar spent than planned (over budget). Abbreviated as "CPI."
Cost Variance	Not an acronym	The difference between Earned Value and Actual Cost, calculated as Earned Value minus Actual Cost. A positive Cost Variance indicates the project is under budget; a negative Cost Variance indicates the project is over budget. Abbreviated as "CV."
CV	Cost Variance	See "Cost Variance."
Dataverse	Not an acronym	Microsoft Dataverse — the enterprise-grade, cloud-based data platform underpinning the Microsoft Power Platform, used in this Reference Guide to store structured project data, team member dimension data, and risk category dimension data. Dataverse provides relational integrity, advanced security controls, and native integration with Power Automate, Power Business Intelligence, and Power Apps.
Data Loss Prevention Policy	Not an acronym	A governance configuration within the Microsoft Power Platform Administration Center that restricts which connectors may be used together within a single Power Automate flow, thereby preventing the unintentional transfer of sensitive organizational data to unauthorized external services. Data Loss Prevention Policies are described in Section 14.5 of this Reference Guide.
Deliverable	Not an acronym	Any unique and verifiable product, result, or capability produced as a result of executing the project, as defined in the Project Charter and Work Breakdown Structure. Deliverables must be formally inspected against their acceptance criteria before being presented for stakeholder approval at a milestone gate review.
DLP	Data Loss Prevention	Commonly used abbreviation for Data Loss Prevention Policy. See "Data Loss Prevention Policy."
EAC	Estimate at Completion	See "Estimate at Completion."
Earned Value	Not an acronym	The authorized budget associated with scheduled work that has actually been accomplished at a given point in time. Earned Value is one of the three core Earned Value Analysis parameters and is used to calculate Schedule Variance, Cost Variance, the Schedule Performance Index, and the Cost Performance Index. Abbreviated as "EV."
Earned Value Analysis	Not an acronym	A methodology that integrates scope, schedule, and cost performance data to provide a comprehensive, objective picture of project performance and to enable forecasting of future performance. Earned Value Analysis metrics are automatically calculated and displayed in the Power Business Intelligence dashboard described in Section 7 of this Reference Guide. Abbreviated as "EVA."
Earned Value Management	Not an acronym	The broader project management practice encompassing the planning, measurement, analysis, and management activities that use Earned Value Analysis as the primary performance measurement framework. Abbreviated as "EVM."
ETC	Estimate to Complete	See "Estimate to Complete."
Estimate at Completion	Not an acronym	The expected total cost of completing all project work, calculated as Actual Cost plus the Estimate to Complete. Estimate at Completion is a forward-looking performance forecast used to predict the final cost of the project based on current performance data. Abbreviated as "EAC."
Estimate to Complete	Not an acronym	The expected cost needed to finish all remaining project work. Estimate to Complete is used in the calculation of the Estimate at Completion and represents the Project Manager's best estimate of the resources required to complete all remaining scope. Abbreviated as "ETC."
EV	Earned Value	See "Earned Value."
EVA	Earned Value Analysis	See "Earned Value Analysis."
EVM	Earned Value Management	See "Earned Value Management."
Executive Sponsor	Not an acronym	The senior organizational leader who holds ultimate accountability for the strategic outcome and business value of the project. The Executive Sponsor authorizes the Project Charter, secures funding, removes organizational impediments, and provides final approval of the Project Closure Report. Fully defined in Section 2.1 of this Reference Guide.
Gate Review	Not an acronym	A formal structured review conducted at the completion of a project milestone, at which the Project Steering Committee evaluates the milestone's deliverables against defined acceptance criteria and renders a formal approval or rejection decision. Gate reviews are automated through the Milestone Completion and Gate Review Flow defined as Flow 6.4 in this Reference Guide.
Hybrid Approach	Not an acronym	A project development approach that combines elements of both predictive (waterfall) and agile methodologies, typically applying predictive methods for overall governance, schedule management, and reporting while using agile iterative cycles for specific delivery components. Described in Section 4.8 of this Reference Guide.
Issue Log	Not an acronym	The centralized SharePoint list used to record and track all project issues — current conditions or events that are already negatively affecting the project and require resolution — as distinct from risks, which are uncertain future events. The Issue Log is monitored through the Power Business Intelligence Risk and Issue Management View.
KPI	Key Performance Indicator	See "Key Performance Indicator."

Term or Acronym	Full Expansion (if acronym)	Definition
Key Performance Indicator	Not an acronym	A quantifiable measurement used to evaluate the degree to which an individual, project, or organization is achieving a defined objective or target. Key Performance Indicators used in the project management context include the Schedule Performance Index, Cost Performance Index, and milestone completion rate. Abbreviated as "KPI."
Large Language Model	Not an acronym	A type of artificial intelligence model trained on vast quantities of text data that is capable of understanding, generating, summarizing, and translating natural human language. Microsoft Copilot is powered by a large language model. Abbreviated as "LLM."
Lessons Learned Register	Not an acronym	The centralized SharePoint list in which all lessons learned from project execution are recorded, categorized by phase and category, and preserved for organizational reference. The Lessons Learned Register is populated through the automated Lessons Learned Collection Flow defined as Flow 6.7 in this Reference Guide.
LLM	Large Language Model	See "Large Language Model."
Microsoft 365	Not an acronym	Microsoft's comprehensive cloud-based productivity and collaboration suite, encompassing applications including Teams, Outlook, SharePoint, Planner, Forms, Word, Excel, PowerPoint, and Copilot. Microsoft 365 is the primary technology platform underlying all tools described in this Reference Guide.
Microsoft Forms	Not an acronym	A Microsoft 365 application used to create surveys, quizzes, and data collection forms. In this Reference Guide, Microsoft Forms is used as the trigger source for the Change Control Board Approval Flow (Flow 6.3) and the Lessons Learned survey distributed through Flow 6.7.
Microsoft Graph Application Programming Interface	Not an acronym (commonly abbreviated "Microsoft Graph API")	The Microsoft application programming interface that provides a unified endpoint for accessing data across Microsoft 365 services including Teams, Planner, Outlook, SharePoint, and Dataverse. Power Automate flows use the Microsoft Graph Application Programming Interface to retrieve Planner task data, create Outlook calendar events, and access Teams meeting metadata.
Microsoft Planner	Not an acronym	A Microsoft 365 task management application used within this Reference Guide as the primary tool for tracking Work Breakdown Structure tasks, assigning work to project team members, recording task completion percentages, and triggering the Milestone Completion and Gate Review Flow through the automated monitoring of milestone task status.
Microsoft Power Platform	Not an acronym	The integrated suite of low-code development, automation, and analytics tools provided by Microsoft, encompassing Power Automate, Power Business Intelligence, Power Apps, and Dataverse. The Power Platform is the foundational automation and analytics technology stack for all automated processes described in this Reference Guide.
Microsoft Project Online	Not an acronym	Microsoft's cloud-based enterprise project management solution that provides advanced scheduling, resource management, and portfolio management capabilities. Where applicable, Microsoft Project Online data is connected to the Power Business Intelligence data model described in Section 7.1 of this Reference Guide.
Milestone	Not an acronym	A significant point or event in a project schedule, typically representing the completion of a major deliverable or phase. Milestones have zero duration and trigger the automated gate review process defined in Flow 6.4 of this Reference Guide when their associated Microsoft Planner tasks are marked as complete.
OData	Open Data Protocol	An open standard data access protocol based on Representational State Transfer (REST) architectural principles, used to enable the querying and manipulation of data from external systems through standardized application programming interfaces. In this Reference Guide, OData feeds are used to connect the Power Business Intelligence data model to the organization's finance system for budget actuals data retrieval.
PII	Personally Identifiable Information	See "Personally Identifiable Information."
Personally Identifiable Information	Not an acronym	Any information that can be used alone or in combination with other information to identify a specific individual. In the context of this Reference Guide, Personally Identifiable Information must not be included in Microsoft Copilot prompts without explicit authorization from the Data Governance Officer and Privacy Officer, as defined in Section 5.8. Abbreviated as "PII."
Planned Value	Not an acronym	The authorized budget assigned to work scheduled to be accomplished by a given point in time. Planned Value represents what the project planned to have accomplished at a specific date, expressed in monetary terms. It is one of the three core Earned Value Analysis parameters. Abbreviated as "PV."
PMI	Project Management Institute	See "Project Management Institute."
PMO	Project Management Office	See "Project Management Office."
PMBOK	Project Management Body of Knowledge	See "Project Management Body of Knowledge Seventh Edition."
Power Automate	Not an acronym	Microsoft Power Automate — the cloud-based workflow automation platform used throughout this Reference Guide to build, deploy, and manage all automated flows. Power Automate connects to SharePoint, Teams, Planner, Outlook, Forms, Dataverse, and Power Business Intelligence through certified connectors, enabling event-driven automation across the project management lifecycle. Described in Section 6 of this Reference Guide.
Power Business Intelligence	Not an acronym	Microsoft Power Business Intelligence — the data visualization and business analytics platform used throughout this Reference Guide to build and maintain the project management performance dashboards described in Section 7. Power Business Intelligence provides interactive visual reports, natural language query capabilities, automated report distribution, row-level security, and mobile application access to project performance data.

Term or Acronym	Full Expansion (if acronym)	Definition
Predictive Approach	Not an acronym	A project development approach — also known as a "waterfall" approach — in which the project scope is defined comprehensively upfront and work proceeds sequentially through planned phases (Initiating, Planning, Executing, Monitoring and Controlling, and Closing) with minimal iteration. Described in Section 4.8 of this Reference Guide.
Project Charter	Not an acronym	The formal document that officially authorizes the existence of the project and grants the Project Manager the authority to apply organizational resources to project activities. The complete Project Charter template is defined in Section 3 of this Reference Guide.
Project Management Body of Knowledge Seventh Edition	Not an acronym (abbreviated "PMBOK Seventh Edition" informally)	The authoritative guide published by the Project Management Institute that defines the knowledge, skills, principles, and performance domains essential for effective project management practice. The Seventh Edition, published in 2021, emphasizes principles-based, outcomes-driven delivery through eight performance domains and twelve guiding principles. This Reference Guide is explicitly aligned with this edition.
Project Management Institute	Not an acronym	The globally recognized professional association for project management, headquartered in Newtown Square, Pennsylvania, United States of America, that establishes project management standards, certifications, and best practices. The Project Management Institute publishes the Project Management Body of Knowledge and other standards referenced in this Reference Guide. Abbreviated as "PMI."
Project Management Office	Not an acronym	The organizational function responsible for establishing, maintaining, and enforcing project management standards, methodologies, templates, and governance processes. The Project Management Office governs all projects subject to this Reference Guide and conducts periodic compliance audits as described in Section 14. Abbreviated as "PMO."
Project Manager	Not an acronym	The individual assigned with the day-to-day responsibility for planning, executing, monitoring, controlling, and closing a specific project. The Project Manager is the primary user of all automated project management tools defined in this Reference Guide. Fully defined in Section 2.1 of this Reference Guide.
Project Registry	Not an acronym	The centralized SharePoint list that serves as the master record of all projects governed by this Reference Guide. The Project Registry contains the Project Unique Identifier, project name, current phase, status, Project Manager assignment, and other key metadata for every project. It is the primary trigger source for several Power Automate flows, including the Lessons Learned Collection Flow (Flow 6.7).
PV	Planned Value	See "Planned Value."
RACI	Responsible, Accountable, Consulted, Informed	A responsibility assignment matrix framework that defines the roles and responsibilities of project participants across key deliverables and process activities. RACI stands for: Responsible (the individual who performs the work), Accountable (the individual who is ultimately answerable for the outcome — only one per activity), Consulted (individuals whose input is sought through two-way communication), and Informed (individuals who receive one-way communication about outcomes). The full RACI matrix for this Reference Guide is defined in Section 2.2.
Residual Risk	Not an acronym	The risk that remains after a risk response strategy has been implemented. Residual risks are assessed with their own Residual Probability and Residual Impact ratings and are continuously monitored by the Risk Manager throughout the project lifecycle, as described in Section 10.4 of this Reference Guide.
Risk Manager	Not an acronym	The project role responsible for overseeing the comprehensive identification, assessment, response planning, monitoring, and escalation of all project risks. The Risk Manager is the primary maintainer of the SharePoint Risk Register and receives immediate automated notifications for high-severity risk entries through the Risk and Issue Escalation Flow (Flow 6.2). Fully defined in Section 2.1 of this Reference Guide.
Risk Register	Not an acronym	The centralized SharePoint list used to record all identified project risks, their probability and impact assessments, response strategies, risk owners, and current statuses. The Risk Register is the primary data source for the Power Business Intelligence Risk and Issue Management View. The complete Risk Register field specification is defined in Section 10.6 of this Reference Guide, and a blank template is provided in Appendix B.
Rolling Wave Planning	Not an acronym	A project planning technique in which near-term work is planned in comprehensive detail while future work is planned at a higher level of abstraction, with the level of detail progressively increased as more information becomes available about future work. Rolling Wave Planning is the prescribed planning approach for all projects governed by this Reference Guide, as described in Section 4.9.
Row-Level Security	Not an acronym	A Power Business Intelligence feature that restricts which rows of data a given user can access in the data model based on their identity and assigned role. Row-Level Security is configured for the project management dashboard as described in Section 7.4 of this Reference Guide to ensure that users can access only the project data they are authorized to view.
Schedule Performance Index	Not an acronym	The ratio of Earned Value to Planned Value, calculated as Earned Value divided by Planned Value. The Schedule Performance Index indicates schedule efficiency: a value greater than one indicates the project is ahead of schedule; a value less than one indicates the project is behind schedule. Abbreviated as "SPI."
Schedule Variance	Not an acronym	The difference between Earned Value and Planned Value, calculated as Earned Value minus Planned Value. A positive Schedule Variance indicates the project is ahead of schedule; a negative Schedule Variance indicates the project is behind schedule. Abbreviated as "SV."
Scope Creep	Not an acronym	The uncontrolled expansion of project scope without corresponding adjustments to time, cost, and resources, typically resulting from the addition of work that has not been formally authorized through the change control process. Scope Creep is prevented under this Reference Guide through the mandatory change control process defined in Section 11.

Term or Acronym	Full Expansion (if acronym)	Definition
SharePoint	Not an acronym	Microsoft SharePoint — the collaborative document and list management platform that serves as the primary data repository for all project management data in this Reference Guide. All project lists, document libraries, and automated flow trigger sources described in this Reference Guide are hosted on SharePoint.
SMART	Specific, Measurable, Achievable, Relevant, Time-bound	A framework for writing project objectives that ensures each objective is Specific (clearly defined), Measurable (quantifiable), Achievable (realistic within project constraints), Relevant (aligned with organizational strategy), and Time-bound (has a defined due date). All project objectives in the Project Charter must be written in SMART format, as required by Section 3.3 of this Reference Guide.
SPI	Schedule Performance Index	See "Schedule Performance Index."
Sprint	Not an acronym	A time-boxed iterative cycle — typically one to four weeks in duration — used in agile development approaches during which a defined set of work items is planned, executed, and reviewed. Sprints are the primary planning and delivery unit for projects using an agile or hybrid development approach under this Reference Guide.
Stakeholder	Not an acronym	Any individual, group, or organization that may affect, be affected by, or perceive themselves to be affected by a decision, activity, or outcome of the project. Stakeholders are identified, analyzed, and managed through the processes defined in Sections 3.9, 4.6, 6.6, and 9 of this Reference Guide.
Stakeholder Register	Not an acronym	The centralized SharePoint list that documents all identified project stakeholders, their interests, influence levels, current and desired engagement classifications, and communication preferences. The Stakeholder Register is populated during the Initiating Phase and maintained throughout the project lifecycle. New entries trigger the automated New Stakeholder Onboarding Flow (Flow 6.6).
SV	Schedule Variance	See "Schedule Variance."
Teams	Not an acronym	Microsoft Teams — the unified collaboration and communication platform that serves as the primary communication channel for all automated notifications, adaptive card approvals, meeting management, and real-time project collaboration in this Reference Guide. Each project is provisioned with a standardized Teams channel structure as defined in Section 9.5.
VAC	Variance at Completion	See "Variance at Completion."
Variance at Completion	Not an acronym	The difference between the Budget at Completion and the Estimate at Completion, calculated as Budget at Completion minus Estimate at Completion. A positive Variance at Completion indicates the project is forecast to complete under budget; a negative Variance at Completion indicates the project is forecast to complete over budget. Abbreviated as "VAC."
Volatility	Not an acronym	In the context of the Project Management Body of Knowledge Seventh Edition and the Uncertainty Performance Domain, volatility refers to the speed and unpredictability of change in the project environment, including rapid changes in technology, market conditions, regulatory requirements, or organizational priorities. Volatility is one of four components of the Uncertainty Performance Domain addressed in Section 4.13 of this Reference Guide.
WBS	Work Breakdown Structure	See "Work Breakdown Structure."
Work Breakdown Structure	Not an acronym	The hierarchical decomposition of the total project scope into progressively smaller, manageable components called work packages, each of which represents a discrete, estimable, and assignable unit of work. The Work Breakdown Structure is developed during the Planning Phase with Copilot assistance (as described in Section 5.2) and is implemented as a structured task hierarchy in Microsoft Planner. Abbreviated as "WBS."

Appendix A: Project Charter Template (Blank — Ready to Complete)

This blank Project Charter template is to be completed by the Project Manager during the Initiating Phase. All shaded fields are mandatory. The completed charter must be submitted for review and approval in accordance with the process defined in Section 3 and Section 4.1 of this Reference Guide. Digital approval is collected through the automated charter approval process in Microsoft Teams.

PROJECT CHARTER			
Project Title:			
Project Unique Identifier:	[Auto-generated by Power Automate]	Charter Version:	
Charter Date:		Sponsoring Department:	
Proposed Start Date:		Proposed End Date:	
Executive Sponsor:		Project Manager:	
Section 1: Business Purpose and Justification			
Business Problem or Opportunity:			
Strategic Alignment:			
Expected Benefits:			
Section 2: Project Objectives (SMART Format)			
Objective 1: Specific, Measurable, Achievable, Relevant, Time-bound statement:			
Objective 2:			
Objective 3:			
Section 3: Scope Summary			
In-Scope:	Out-of-Scope:		
Section 4: High-Level Milestones			
Milestone	Description	Target Date	Approver
Section 5: Budget Authorization			
Total Authorized Budget (United States Dollars):			
Contingency Reserve:			
Section 6: Key Assumptions and Constraints			
Assumptions:	Constraints:		
Section 7: Initial Risk Summary			
Risk Description	Probability (1-5)	Impact (1-5)	Response Strategy
Section 8: Approval Sign-off			
Role	Printed Name	Signature	Date
Executive Sponsor			
Project Steering Committee Chairperson			
Project Management Office Director			
Project Manager			

Appendix B: Risk Register Template (Blank — Ready to Complete)

The following blank Risk Register template is pre-configured with all mandatory fields as defined in Section 10.6 of this Reference Guide. This template corresponds to the structure of the SharePoint Risk Register list. Each row represents one individual risk record. The Risk Identifier and Severity Score fields are auto-calculated by SharePoint upon record creation and modification respectively and do not require manual entry.

Risk Identifier	Project Identifier	Risk Title	Risk Description	Category	Probability (1-5)	Impact (1-5)	Severity Score	Response Strategy	Response Description	Risk Owner	Status	Date Identified	Target Resolution Date	Residual Probability	Residual Impact	Last Res Date
[Auto]							[Auto]									
[Auto]							[Auto]									
[Auto]							[Auto]									

Risk Category Reference

Valid category values: Technical | Schedule | Financial | Resource | Stakeholder | External | Regulatory

Valid response strategy values: Avoid | Transfer | Mitigate | Accept | Escalate

Valid status values: Open | In Progress | Accepted | Closed

Appendix C: Change Request Form Template (Blank — Ready to Complete)

The following Change Request Form is replicated from the Microsoft Forms source. All fields marked with an asterisk (*) are mandatory. This form is submitted via the Microsoft Forms link pinned in the project Teams Change Control channel and in the project SharePoint site. Submission of this form triggers the automated Change Control Board Approval Flow defined as Flow 6.3 in this Reference Guide.

CHANGE REQUEST FORM	
Change Request Identifier:*	[Auto-generated by Power Automate upon submission]
Project Name and Identifier:*	
Date of Submission:*	
Submitter Name:*	
Submitter Role:*	
Change Request Title:*	
Change Description (full, formal detail required):*	
Business Rationale and Justification:*	
Change Classification:*	☐ Minor ☐ Moderate ☐ Major ☐ Emergency
Scope Elements Affected:*	
Estimated Schedule Impact (in business days — positive = delay; negative = acceleration):*	
Estimated Cost Impact (in United States Dollars — positive = increase; negative = decrease):*	
Quality Impact (describe any changes to acceptance criteria or testing requirements):*	
Risk Impact (list any new risks or changes to existing risks introduced by this change):*	
Stakeholders Affected (list names or groups):*	
Resource Requirements (additional personnel, technology, or vendor resources required):*	
Supporting Documentation (attach or reference relevant documents):	
Change Control Board Decision (completed by Change Control Board — do not complete at submission):	
Decision:	☐ Approved ☐ Rejected ☐ Deferred
Vote Tally:	Approve: ____ Reject: ____ Defer: ____ Total Votes Cast: ____
Decision Date:	
Change Control Board Comments:	
Implementation Date (if Approved):	

Appendix D: Status Update Collection Form Fields

The following table defines all fields included in the weekly status update adaptive card delivered via Microsoft Teams through the Weekly Project Status Collection Flow (Flow 6.1). These fields are pre-populated where possible using data from the team member's active Planner task assignments and are presented in a formatted adaptive card interface for efficient data entry. All responses are automatically written to the Status Updates SharePoint list upon submission.

Field Name	Data Type	Required	Description and Guidance
Project Identifier	Text (pre-populated)	Yes	Auto-populated from the project assignment record. No action required by the respondent.
Project Name	Text (pre-populated)	Yes	Auto-populated from the Project Registry. No action required by the respondent.
Reporting Week (week ending date)	Date (pre-populated)	Yes	Auto-populated with the date of the Sunday immediately following the Monday trigger date. No action required.
Team Member Name	Text (pre-populated)	Yes	Auto-populated from the organizational directory. No action required by the respondent.
Task Identifier	Text (pre-populated; one per assigned task)	Yes	Auto-populated from the team member's active Planner task assignments. One status entry is requested per active task.
Task Name	Text (pre-populated)	Yes	Auto-populated from the Planner task record. No action required.
Percentage Complete	Number (0-100; slider or numeric entry)	Yes	The respondent enters the estimated percentage of the task that has been completed as of the reporting date. This value updates the Planner task completion percentage automatically upon submission.
Hours Logged This Week	Number (decimal)	Yes	The total number of hours worked on this task during the reporting week. Used to calculate team utilization in the Power Business Intelligence Resource and Team Utilization dashboard page.
Blockers and Impediments	Free text (maximum five hundred characters)	No	A brief description of any blockers, impediments, or dependencies that are currently preventing or slowing progress on this task. If none, the respondent should enter "None." Entries in this field are highlighted in the Project Manager's weekly dashboard review.
New Risks Identified	Free text (maximum five hundred characters)	No	A brief description of any new risks identified during the reporting week that have not yet been entered in the Risk Register. The Project Manager reviews all entries in this field and enters confirmed risks into the SharePoint Risk Register within one business day.
Overall Project Health Assessment	Choice: Green / Yellow / Red	Yes	The respondent's subjective assessment of the overall health of the project from their perspective: Green (on track, no significant concerns), Yellow (some concerns that require attention but are manageable), or Red (significant issues that require immediate Project Manager intervention). This field is used to calculate the composite health badge on the Power Business Intelligence Individual Project Health Dashboard.
Additional Comments	Free text (maximum one thousand characters)	No	Any additional observations, concerns, accomplishments, or information the team member wishes to communicate to the Project Manager beyond what is captured in the structured fields above.
Submission Date and Time	Date and Time (auto-recorded)	Yes (auto-recorded)	Automatically recorded by the Power Automate flow at the moment of submission. Used to determine whether the submission was received within the required window or constitutes a late response.

Appendix E: Lessons Learned Survey Questions

The following survey questions are used in the Microsoft Forms lessons learned survey distributed to all project participants through the Lessons Learned Collection Flow (Flow 6.7) upon the project entering Closing status. The survey is designed to elicit candid, constructive, and structured feedback that can be synthesized by Copilot into a comprehensive Lessons Learned Register. All questions are directed to the individual's personal experience on the project and are treated confidentially in aggregation; individual responses are visible only to the Project Manager and Project Management Office Director.

85. **Overall Experience:** On a scale of one to five — where one represents Extremely Dissatisfied and five represents Extremely Satisfied — how would you rate your overall experience of working on this project? Please explain your rating in two to three sentences.
86. **Project Initiation and Charter:** Was the project's purpose, scope, and expected outcomes clearly communicated to you at the outset of the project? If not, what information was missing or unclear, and how did this affect your ability to contribute effectively?
87. **Planning Effectiveness:** Were the project plan, work breakdown structure, schedule, and individual task assignments clear, reasonable, and well-communicated? What, if anything, would you recommend changing about the planning process for future projects?
88. **Communication Quality:** Were you kept adequately informed of project status, decisions, changes, and risks throughout the project? Were the communication channels — including Teams channels, status reports, and meeting records — effective for your needs? What improvements would you suggest?
89. **Risk and Issue Management:** Were risks and issues identified, communicated, and addressed in a timely and effective manner? Were there any risks or issues that were not identified early enough? If so, describe the impact and what could have been done differently.
90. **Change Control Process:** Were changes to the project scope, schedule, or budget handled in a structured, transparent, and fair manner? Were you adequately informed of approved changes and their impact on your work? What improvements to the change control process would you suggest?
91. **Team Collaboration:** How effectively did the project team collaborate — including sharing information, supporting each other, and working toward common goals? Were there any team dynamics or interpersonal issues that negatively affected the project? What could be done to improve team collaboration on future projects?
92. **Automated Tools and Technology:** How effective were the automated tools — including the Microsoft Teams status collection cards, Power Business Intelligence dashboard, and action item tracking flows — in supporting your work on this project? What improvements to the automated tools would have made your work easier?
93. **Microsoft Copilot Usage:** If you used Microsoft Copilot during this project, how useful did you find it? In which activities did Copilot add the most value? In which activities did Copilot fall short of expectations, and why?
94. **Quality Management:** Were the quality standards, acceptance criteria, and quality control processes clearly defined and consistently applied? Were any deliverables rejected at quality gates that, in your view, should not have been? What improvements to the quality management process would you recommend?
95. **Resource Adequacy:** Were sufficient personnel, skills, tools, and financial resources available to execute the project as planned? Were there periods of resource constraint that adversely affected the project? What would you recommend to improve resource planning on future projects?
96. **Stakeholder Engagement:** Were stakeholders adequately engaged throughout the project? Were there stakeholders whose concerns were not effectively addressed? What improvements

to the stakeholder engagement approach would you recommend?

97. **Most Significant Success:** In your view, what was the single most significant success of this project — the thing that worked exceptionally well and should be deliberately replicated on future projects? Please describe in as much detail as possible.
98. **Most Significant Improvement Opportunity:** In your view, what was the single most important area for improvement on this project — the thing that, if done differently, would have had the greatest positive impact on the project's outcome? Please describe in as much detail as possible and propose a specific improvement action.
99. **Overall Recommendation:** Is there anything else you would like to share about your experience on this project that is not captured in the questions above? Any additional lessons, observations, or recommendations for the Project Management Office are welcomed here.

Appendix F: Power Automate Flow Trigger Reference Table

The following table provides a consolidated reference summary of all eight automated Power Automate flows defined in Section 6 of this Reference Guide. This table is maintained by the Microsoft Power Platform Administrator and is updated whenever flows are modified, deactivated, or replaced. The Flow Identifier in the first column corresponds to the subsection number in Section 6 where the full flow specification is documented.

Flow ID	Flow Name	Trigger Type	Trigger Source	Trigger Condition	Frequency / Timing	Primary Recipients	Owner Role
PMO-FLOW-001	Weekly Project Status Collection	Scheduled Recurrence	Power Automate Recurrence connector	Every Monday at 8:00 in the morning Eastern Time (holiday exclusion applied)	Weekly — every Monday	All active Project Team Members (via Teams adaptive card); Project Manager (escalation)	Microsoft Power Platform Administrator
PMO-FLOW-002	Risk and Issue Escalation	Event-driven (item created or modified) + Scheduled Digest	SharePoint — Risk Register list	New Risk Register item created, OR existing item modified with Severity Rating of four or five; weekly digest every Friday at 4:00 in the afternoon Eastern Daylight Time	Real-time (item trigger); weekly (digest)	Risk Manager, Project Manager (immediate); Risk Manager, Project Manager, Deputy Project Manager (digest)	Microsoft Power Platform Administrator
PMO-FLOW-003	Change Control Board Approval	Event-driven (form submission)	Microsoft Forms — Change Request Form	New response submitted to the Change Request Form	Real-time upon submission	Change Control Board Members (voting adaptive card); submitter and all stakeholders (decision notification)	Microsoft Power Platform Administrator
PMO-FLOW-004	Milestone Completion and Gate Review	Event-driven (Planner task completion)	Microsoft Planner via Microsoft Graph Application Programming Interface	Planner task with "Milestone" category tag marked as 100% complete	Real-time upon milestone completion	Project Steering Committee (gate review adaptive card); all Project Team Members (approval announcement)	Microsoft Power Platform Administrator
PMO-FLOW-005	Budget Variance Alert	Event-driven (SharePoint item created or modified)	SharePoint — Financial Tracking list	Actual Cost to Date exceeds Planned Cost to Date by more than ten percent	Real-time upon financial data entry	Finance Controller, Project Manager (ten percent threshold); Executive Sponsor additionally (twenty-five percent threshold)	Microsoft Power Platform Administrator
PMO-FLOW-006	New Stakeholder Onboarding	Event-driven (SharePoint item created)	SharePoint — Stakeholder Register list	New item created in Stakeholder Register list	Real-time upon new stakeholder record creation	New stakeholder (welcome email via Outlook); Communications Manager (onboarding meeting invitation)	Microsoft Power Platform Administrator
PMO-FLOW-007	Lessons Learned Collection and Project Archival	Event-driven (SharePoint item modified)	SharePoint — Project Registry list	Project Status field modified to value "Closing"	Event-driven; triggered once per project upon Closing status transition	All project participants (survey email via Outlook); Project Manager, Power Platform Administrator (archival confirmation via Teams)	Microsoft Power Platform Administrator
PMO-FLOW-008	Meeting Action Item Tracking	Event-driven (SharePoint file created)	SharePoint — "Meeting Transcripts" document library folder	New Teams meeting transcript file saved to the "Meeting Transcripts" folder	Real-time upon transcript file creation	All meeting attendees (post-meeting summary via Teams); task owners (twenty-four-hour reminder via Teams direct message)	Microsoft Power Platform Administrator

The following table summarizes the error handling approach common to all flows:

Error Condition	Retry Logic	Fallback Action	Escalation
Teams adaptive card delivery failure	Retry three times at two-to-five minute intervals	Send equivalent notification via Microsoft Outlook email	Log to Flow Error Log in SharePoint; alert Microsoft Power Platform Administrator via Teams

Error Condition	Retry Logic	Fallback Action	Escalation
SharePoint list write failure	Retry three times at five-minute intervals	Log failed record to Error Log; send manual action request to Power Platform Administrator	Alert Microsoft Power Platform Administrator via Teams
Power Business Intelligence refresh failure	Retry twice at fifteen-minute intervals	Notify recipients that dashboard data may be stale; direct to SharePoint list for raw data	Alert Microsoft Power Platform Administrator via Teams
Microsoft Graph Application Programming Interface call failure	Retry twice at five-minute intervals	Send notification via Outlook email; log failure for manual remediation	Alert Microsoft Power Platform Administrator via Teams
Flow run timeout (greater than thirty minutes)	Not applicable — flows are designed to complete within ten minutes under normal conditions	Flow run marked as failed; manual restart required by Power Platform Administrator	Automatic failure alert to Power Platform Administrator via Power Automate monitoring

Appendix G: Microsoft Copilot Approved Prompt Library

The following twenty approved prompts constitute the official Microsoft Copilot prompt library for all recurring, standardized project management activities governed by this Reference Guide. All prompts have been reviewed and approved by the Microsoft Copilot Coordinator and the Data Governance Officer and are published in the Project Management Office SharePoint site for reference by all project personnel. Prompts may be customized to include project-specific details (indicated by square bracket placeholders), but the core structure and intent of each approved prompt must be preserved. Any prompt not included in this library that is intended for a recurring project management use case must be submitted to the Microsoft Copilot Coordinator for review and approval before use.

Prompt Number	Prompt Name	Approved Prompt Text	Intended Use	Human Review Required
COP-001	Project Charter Draft Generation	"Using the attached business case document and the Project Charter template from the Project Management Office SharePoint site, draft a formal Project Charter for the project titled [Project Title]. Ensure all SMART objectives are clearly stated, all in-scope and out-of-scope items are explicitly listed, and an initial risk summary of at least three risks is included. Use formal, professional language throughout."	Initiating Phase: accelerating the drafting of the Project Charter from the approved business case	Yes — mandatory review by Project Manager and Business Analyst before submission for approval
COP-002	Initial Risk Register Generation	"Analyze the attached Project Charter and business case for [Project Title] and identify at least ten potential project risks. For each risk, provide: a Risk Title, a Risk Description, the Risk Category (Technical, Schedule, Financial, Resource, Stakeholder, External, or Regulatory), a Probability Rating from one to five, an Impact Rating from one to five, and a proposed Response Strategy. Format the output as a table."	Initiating Phase: generating an initial risk register for review by the Risk Manager	Yes — mandatory review and validation by Risk Manager before entry into SharePoint Risk Register
COP-003	Stakeholder Meeting Summary	"Summarize the attached transcript of the stakeholder workshop for [Project Title] held on [Date]. Identify and list: the key stakeholder interests and concerns expressed, any requirements or scope items mentioned, any risks or issues raised, any decisions made, and any action items with owners and due dates. Format the summary in clear, professional language suitable for inclusion in the Stakeholder Register."	Initiating and Executing Phases: synthesizing stakeholder workshop transcripts into structured inputs	Yes — mandatory review by Communications Manager and Business Analyst
COP-004	Work Breakdown Structure Draft Generation	"Based on the approved Project Charter for [Project Title], generate a draft Work Breakdown Structure with at least three levels of decomposition. Organize the Work Breakdown Structure by major project phases and deliverables. For each work package at the lowest level, include an estimated duration in business days and a suggested responsible role from the following list: [list of project roles]. Format the output as a hierarchical numbered list."	Planning Phase: generating an initial Work Breakdown Structure for review and refinement by the Project Manager	Yes — mandatory review by Project Manager, Business Analyst, and Technical Lead and Solution Architect
COP-005	Communication Plan Draft Generation	"Using the attached Stakeholder Register for [Project Title], generate a draft Communication Plan in table format. For each stakeholder group, define the communication type, message content summary, frequency, delivery channel (Teams / Outlook / Power Business Intelligence / meeting), and responsible role. Ensure every stakeholder has at least one regular communication. Use formal language throughout."	Planning Phase: generating the Communication Plan as a subsidiary element of the Project Management Plan	Yes — mandatory review by Communications Manager before inclusion in Project Management Plan

Prompt Number	Prompt Name	Approved Prompt Text	Intended Use	Human Review Required
COP-006	Weekly Project Status Report Draft	"Using the attached status update data for [Project Name] for the week of [Week Ending Date], draft a formal weekly project status report. Include the following sections: Executive Summary (two to three sentences), Schedule Status (with Schedule Performance Index value of [SPI value] and commentary), Budget Status (with Cost Performance Index value of [CPI value] and commentary), Risk Summary (top three risks), Key Accomplishments This Week, Planned Activities Next Week, and Open Issues Requiring Attention. Use professional, formal language."	Executing Phase: drafting the weekly status report for review and publication by the Project Manager	Yes — mandatory review by Project Manager before distribution
COP-007	Meeting Action Item Extraction	"Review the attached meeting transcript for the meeting titled [Meeting Title] held on [Date] and extract all action items, commitments, and follow-up tasks mentioned. For each item, provide: the Action Item Description, the Name of the Assigned Owner (as mentioned in the transcript), and the Due Date (as stated in the meeting, or 'Not Specified' if not mentioned). Format the output as a numbered table."	Executing Phase: extracting action items from Teams meeting transcripts for creation in Microsoft Planner	Yes — mandatory review by Deputy Project Manager before Planner tasks are created
COP-008	Post-Meeting Summary Generation	"Using the attached meeting transcript for [Meeting Title] held on [Date] with attendees [Attendee List], generate a formal post-meeting summary. Include: Meeting Overview (two to three sentences), Key Topics Discussed (bulleted list), Decisions Made (bulleted list), Action Items (table with description, owner, and due date), and Open Questions (bulleted list). Use formal, professional language."	Executing Phase: generating post-meeting summaries for distribution to meeting attendees through Flow 6.8	Yes — review by Deputy Project Manager before distribution via Teams
COP-009	Corrective Action Recommendation	"The project [Project Name] has a current Schedule Performance Index of [SPI value] and a Cost Performance Index of [CPI value]. The primary cause of the variance appears to be [describe cause]. Generate three to five specific, actionable corrective action recommendations to improve performance. For each recommendation, describe: the specific action, the expected impact on Schedule Performance Index or Cost Performance Index, the responsible role, and the estimated implementation timeframe."	Monitoring and Controlling Phase: generating corrective action options for Project Manager review	Yes — mandatory review and decision by Project Manager before any corrective action is implemented
COP-010	Change Impact Analysis Summary	"Based on the attached Change Request [Change Request Identifier] for project [Project Name] and the current Project Management Plan, summarize the potential impact of the proposed change across the following dimensions: Scope, Schedule, Cost, Quality, Risk, Stakeholder, and Resource. Format the output as a table with a brief narrative explanation of each impact dimension. Use formal language."	Monitoring and Controlling Phase: assisting the Project Manager in preparing the change impact assessment for the Change Control Board	Yes — mandatory review by Project Manager, Finance Controller, and Technical Lead before submission to Change Control Board
COP-011	Risk Response Plan Generation	"For the following risk identified on project [Project Name]: Risk Title: [Title], Risk Description: [Description], Probability: [Rating], Impact: [Rating], generate a detailed Risk Response Plan. Include: the recommended Response Strategy (Avoid / Transfer / Mitigate / Accept / Escalate) with justification, at least three specific response actions, the recommended Risk Owner role, and the target resolution date. Use formal language."	Planning and Executing Phases: generating Risk Response Plans for review by the Risk Manager	Yes — mandatory review and approval by Risk Manager

Prompt Number	Prompt Name	Approved Prompt Text	Intended Use	Human Review Required
COP-012	Lessons Learned Summary Generation	"The following lessons learned survey responses have been collected from [Number] participants on project [Project Name]. Analyze the responses and generate a structured Lessons Learned Summary organized by project phase (Initiating, Planning, Executing, Monitoring and Controlling, Closing) and category (People, Process, Technology, Communication). For each category and phase combination, identify recurring themes, summarize the key lesson, and propose a specific, actionable improvement recommendation for future projects. Use formal language."	Closing Phase: synthesizing lessons learned survey responses into the formal Lessons Learned document	Yes — mandatory review and validation by Project Manager and Project Management Office Director
COP-013	Project Closure Report Draft	"Using the attached project performance data, final status report, Lessons Learned Summary, and Deliverable Acceptance Records for project [Project Name] (Project Identifier: [ID]), draft a formal Project Closure Report. Include sections covering: Project Overview, Performance Summary against Original Objectives, Schedule and Cost Performance Summary (with final Earned Value Analysis metrics), Quality Summary, Risk Summary, Stakeholder Engagement Summary, Lessons Learned Key Themes, Benefits Realization Assessment, and Formal Acceptance Confirmation. Use professional, authoritative language throughout."	Closing Phase: drafting the Project Closure Report for review by the Project Manager and Executive Sponsor	Yes — mandatory review by Project Manager and approval by Executive Sponsor
COP-014	Power Business Intelligence Natural Language Portfolio Query	"In Power Business Intelligence, navigate to the Questions and Answers feature on the Executive Portfolio Overview page and enter: 'Show me all active projects where the Schedule Performance Index is less than 0.90, ranked by Schedule Performance Index from lowest to highest, including Project Name, Project Manager, current Phase, Schedule Performance Index value, and number of days to planned completion date.'"	Monitoring and Controlling Phase: enabling Portfolio Managers and Executive Sponsors to query portfolio performance data without requiring technical Power Business Intelligence expertise	Yes — results should be cross-referenced against dashboard data before executive decisions are made
COP-015	Stakeholder Communication Draft — Status Update	"Draft a formal project status communication for stakeholder group [Stakeholder Group Name] for project [Project Name] covering the period [Date Range]. This stakeholder group is classified as [Supportive / Neutral / Leading] and their primary interest area is [Interest Area]. The communication should include: a brief executive summary of project status, two to three key accomplishments from the period, any significant risks or issues relevant to this stakeholder group's interests, upcoming milestones, and any decisions or input required from this group. Tone should be [formal and concise / detailed and explanatory]. Maximum length: [number] words."	Executing Phase: drafting tailored stakeholder communications for review by the Communications Manager	Yes — mandatory review by Communications Manager and Project Manager before distribution
COP-016	Power Automate Flow Description Generation	"Generate a comprehensive plain-language description of the Power Automate flow with the following specification: Flow Name: [Name], Trigger: [Trigger Description], Actions: [List of Actions], Conditions: [List of Conditions]. The description should be suitable for inclusion in the flow documentation library and should explain the flow's purpose, when it runs, what it does step by step, who receives notifications, what data it writes, and how errors are handled. Target audience: non-technical project management staff."	Configuration and ongoing maintenance: documenting Power Automate flows in plain language for the Microsoft Power Platform Administrator's documentation library	Yes — mandatory review by Microsoft Power Platform Administrator for technical accuracy

Prompt Number	Prompt Name	Approved Prompt Text	Intended Use	Human Review Required
COP-017	Risk Digest Narrative Generation	"Using the attached Risk Register data for project [Project Name] for the week of [Week Ending Date], generate a concise formal narrative Risk Digest suitable for distribution to the Risk Manager, Project Manager, and Deputy Project Manager. The digest should: summarize the total count of open risks by severity category, highlight the top three risks by severity score, describe any new risks added this week, note any risks whose status changed this week, identify any risks overdue for response action, and conclude with a one-paragraph overall risk assessment of the project. Use formal, professional language."	Monitoring and Controlling Phase: generating the weekly Risk Digest narrative component distributed through Flow 6.2	Yes — review by Risk Manager before distribution
COP-018	Vendor Performance Assessment Summary	"Using the attached vendor performance data for vendor [Vendor Name] on project [Project Name] covering the period [Date Range], generate a formal Vendor Performance Assessment Summary. Include sections covering: Delivery Performance (on-time delivery rate, number of deliverables accepted on first submission versus requiring rework), Quality of Deliverables (average quality rating and notable issues), Responsiveness and Communication (response time to issues and change requests), Contract Compliance, and an Overall Performance Rating on a scale of one to five. Conclude with specific recommendations for the next review period."	Executing and Closing Phases: generating formal vendor performance assessments for review by the Procurement Officer	Yes — mandatory review by Procurement Officer and Finance Controller
COP-019	Transition Plan Summary Generation	"Based on the attached Project Charter, final deliverable list, and operational context for project [Project Name], draft a formal Transition to Operations Summary. Include: a list of all deliverables being transitioned with their operational owners, required training activities and completion status, documentation transferred to the operational team (with SharePoint links), the support model for the thirty-to-ninety-day post-transition period, outstanding items to be resolved by the operational team, and the formal handover confirmation language for the Transition Acceptance Record. Use formal, authoritative language."	Closing Phase: drafting the Transition to Operations summary for review by the Project Manager and operational leadership	Yes — mandatory review by Project Manager and receiving operational team leadership
COP-020	Earned Value Analysis Narrative	"Based on the following Earned Value Analysis data for project [Project Name] as of [Reporting Date]: Planned Value = [PV value], Earned Value = [EV value], Actual Cost = [AC value], Budget at Completion = [BAC value], calculate the Schedule Variance, Cost Variance, Schedule Performance Index, Cost Performance Index, Estimate at Completion (using the formula: Actual Cost plus (Budget at Completion minus Earned Value) divided by Cost Performance Index), and Variance at Completion. Then generate a two-to-three paragraph formal narrative analysis explaining what these metrics indicate about the project's current performance and forecast final outcome, and recommending one to two specific management actions based on the data."	Monitoring and Controlling Phase: generating Earned Value Analysis narratives for inclusion in weekly status reports and the Power Business Intelligence dashboard	Yes — mandatory review by Project Manager and Finance Controller for accuracy before publication

Important Note Regarding Copilot Prompt Usage

All prompts in this library are reviewed quarterly by the Microsoft Copilot Coordinator. Personnel who identify a need for a new recurring prompt should submit the proposed prompt to the Microsoft Copilot Coordinator for review, testing, and approval prior to use. No prompt that involves the input of personally identifiable information, financial account numbers, protected health information, or contractually confidential vendor information may be used without explicit written authorization from the Data Governance Officer. All Copilot-generated content is a draft and requires human review before any official use.

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