

Project Assessment & Review Process

February/March 2004

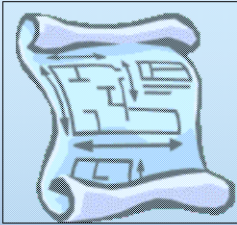


**Presented by the
IS Project Practices & Methods Group**

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- Mark Dattoli, x3814

The Project Assessment & Review Process

Outline	Objectives
Part 1 • Project Management 101 – Projects, Phases & Gates, Benefits Part 2 • IS Project Assessment & Review – Overview of the 5 Phases • Concept • Insight • Prioritization • Business Case • Project Selection – Objectives, Gates, Inputs & Outputs – Summary Diagram – Overall Flow Diagram – Routes through the Process Part 3 • Details of the 5 Phases – Purpose – Inputs & Outputs – Process Flow – Roles & Responsibilities Part 4 • When would you use this Process? • Using Request Central	At the end of this session, you will: • Understand the importance of a standard Project Assessment & Review process • Know the 5 phases through which requests proceed in the process • Understand which requests go through the process and which do not • Be able to use Request Central to move requests through the process



Part 1: Review

Project Management 101

Review: Project Management 101

What is a Project?

A temporary endeavor undertaken to create a unique product, service, enhancement, deliverable, or result.

What is Project Assessment & Review?

A Phase & Gate process used to move a new request from a simple idea to a formal project authorization.

What is a Phase & Gate process?

“Phase & Gate” is a widely employed process that divides effort into distinct time-sequenced phases separated by management decision gates. Multifunctional teams must successfully complete a prescribed set of related cross-functional tasks in each phase prior to obtaining management approval to proceed to the next phase of the process

Phases

Phases are where the action occurs. The players on the project team undertake key tasks to gather information needed to advance the project to the next gate or decision point.

Gates

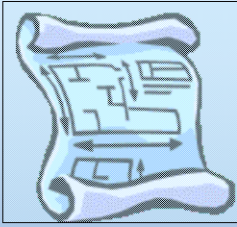
Preceding each phase is a decision point or gate which serves as a Go/Kill and prioritization decision point. Gates provide the funnels where mediocre projects are culled out and resources are allocated to the best projects.

What are the benefits of Project Assessment & Review?

- Puts discipline into an otherwise ad-hoc, chaotic process.
- Provides improved focus via gates, where poor projects are killed and efforts can be redirected to more promising projects.
- Ensures a complete process - no critical errors of omission and no missing steps.
- Builds the voice of the customer into new projects.
- The process is visible, relatively simple, and easy to understand and communicate.
- The requirements are clear: expectations of teams and leaders at each phase and gate are spelled out.
- Phase-Gate manages business risk by breaking resource commitments into increments or phases.
- Clearly defined gates with pre-specified deliverables mean faster decision-making.

The result:

A more effective, efficient, faster process that produces more successful projects!

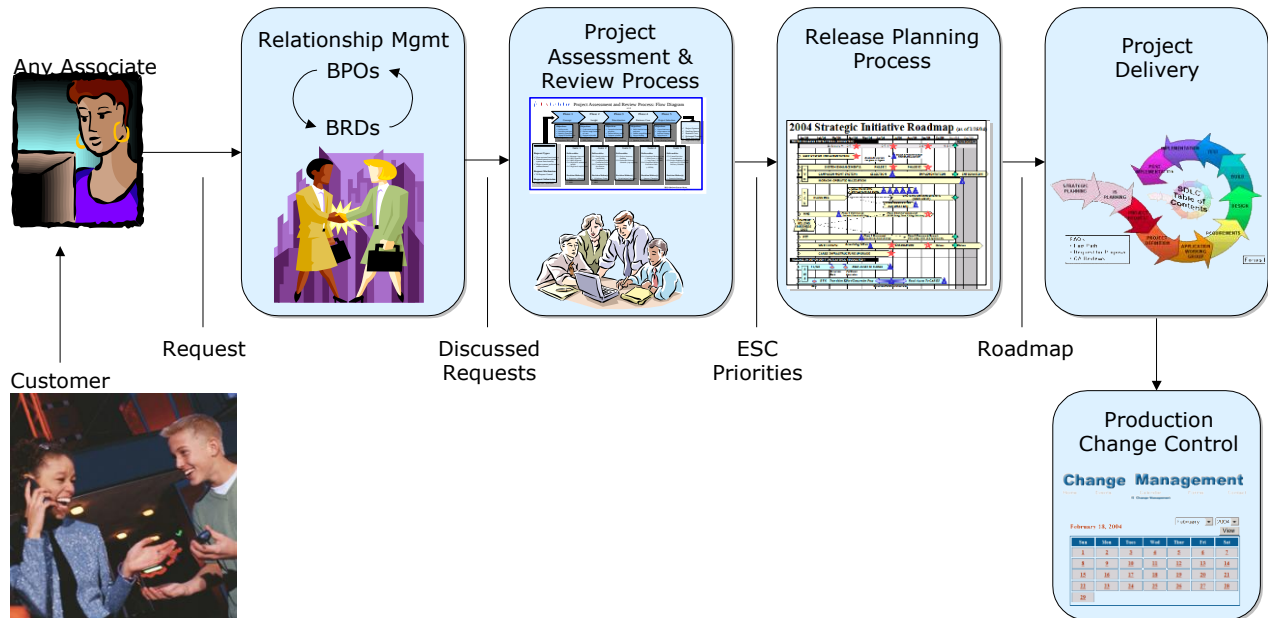


Part 2: Project Assessment & Review

Project Assessment & Review: Context Diagram

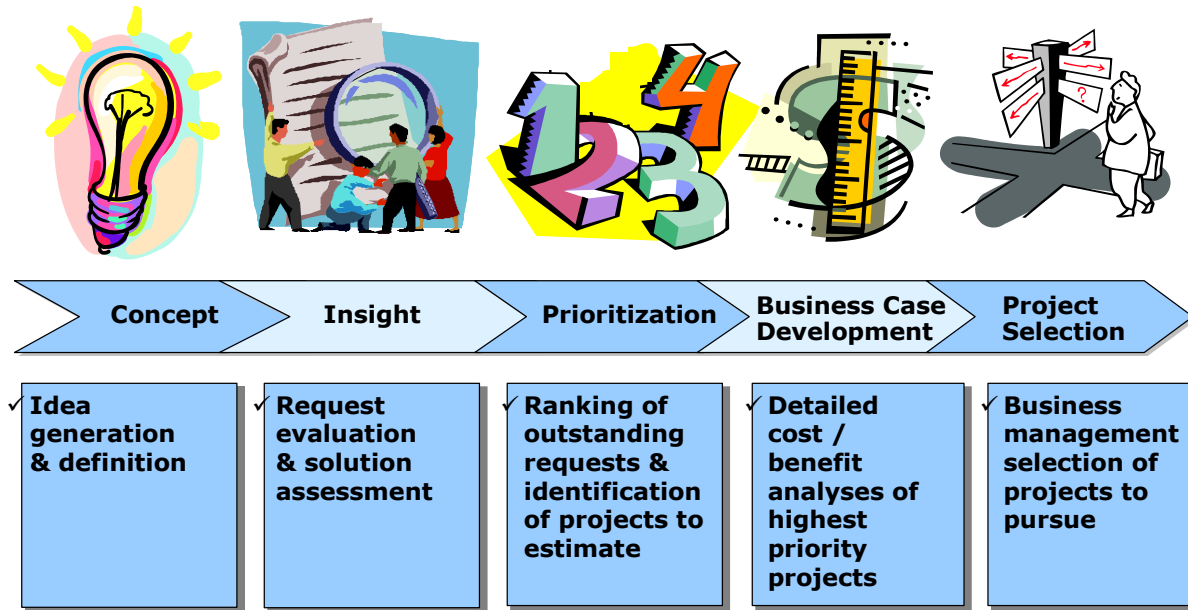
Project Assessment and Review Process: Context Diagram

v1.0



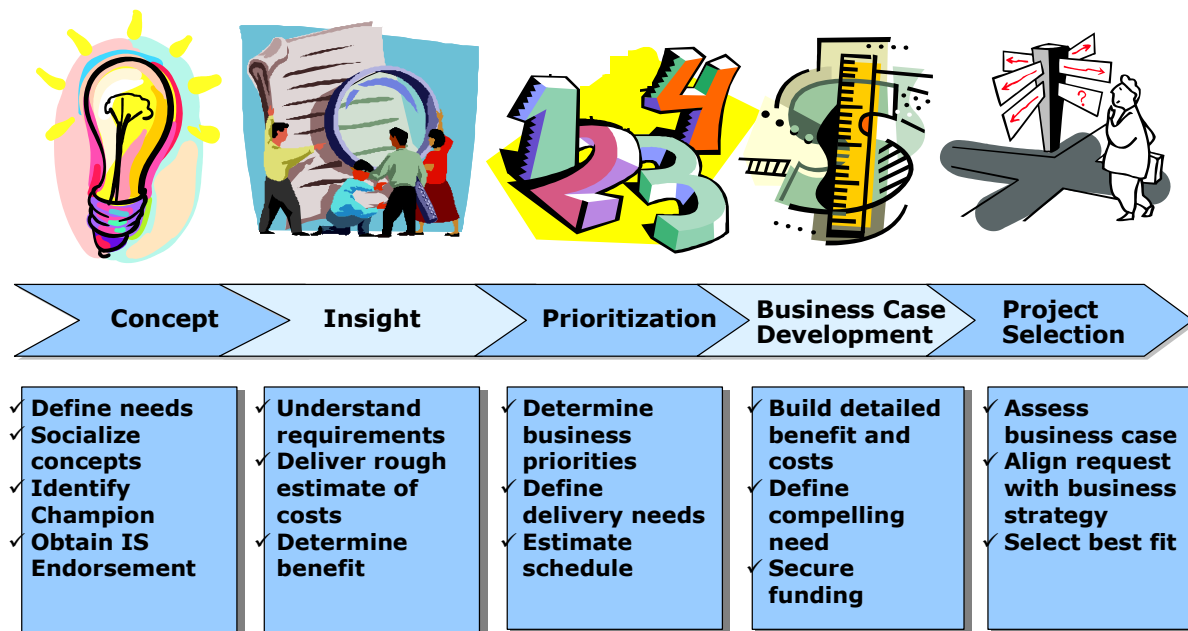
Project Assessment & Review: Five Phases

5 Phases: **Overview**



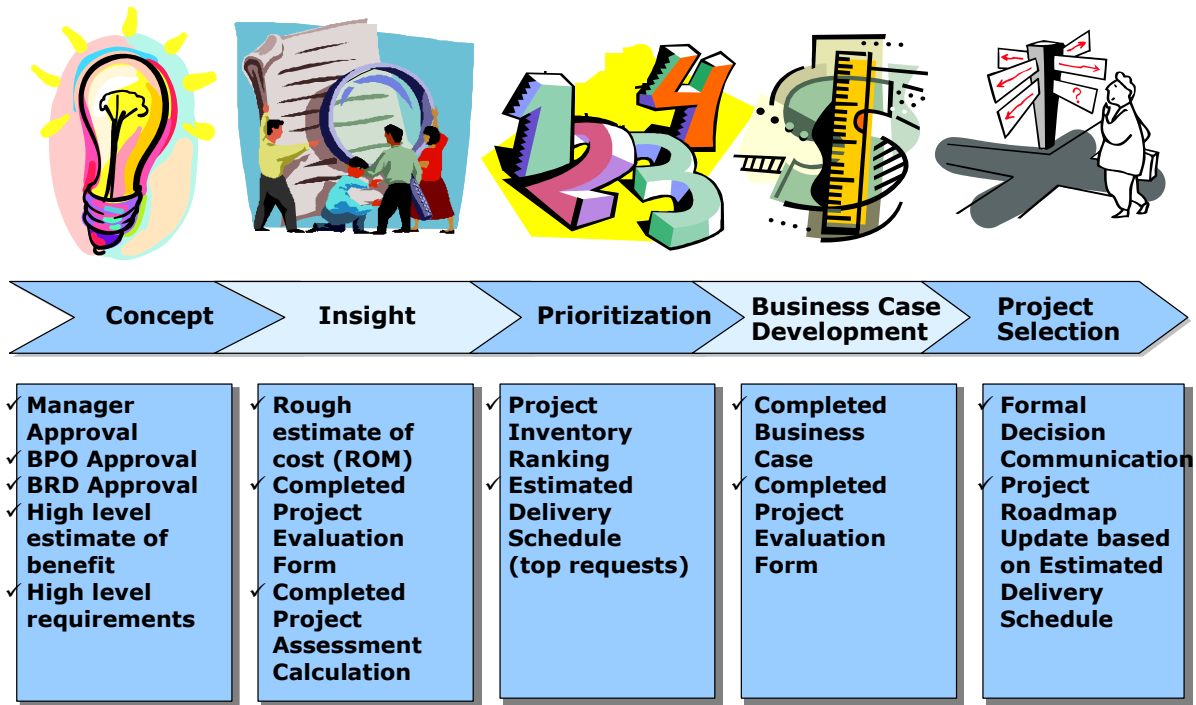
Project Assessment & Review: Five Phases

5 Phases: **Objectives**



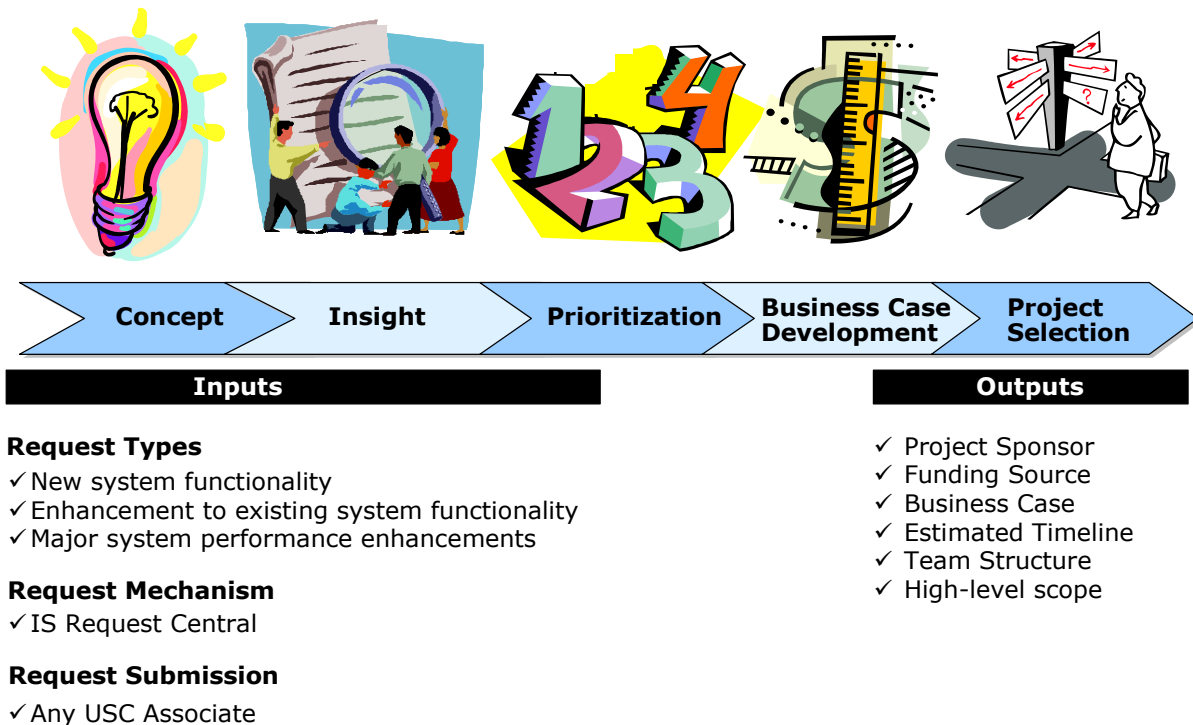
Project Assessment & Review: Five Phases

5 Phases: **Gates**



Project Assessment & Review: Five Phases

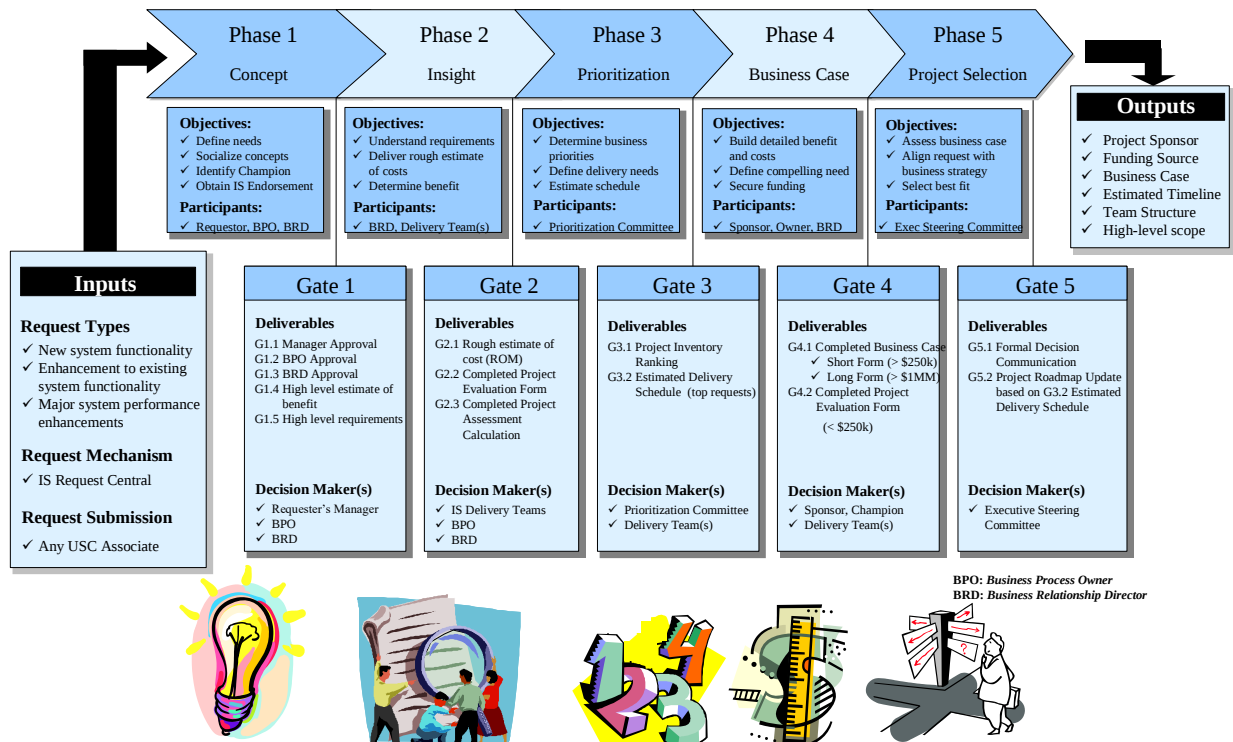
5 Phases: **Inputs & Outputs**



Project Assessment & Review: Overview Diagram

Project Assessment and Review Process: Flow Diagram

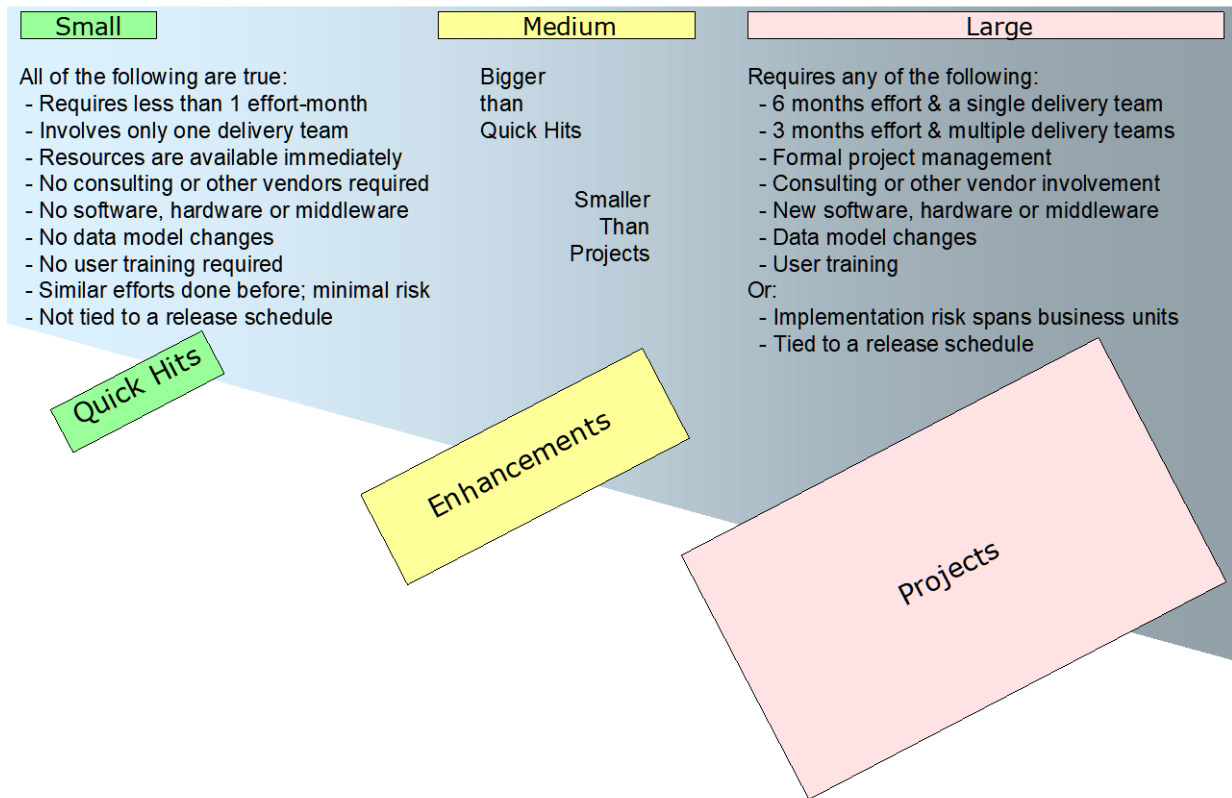
v1.0



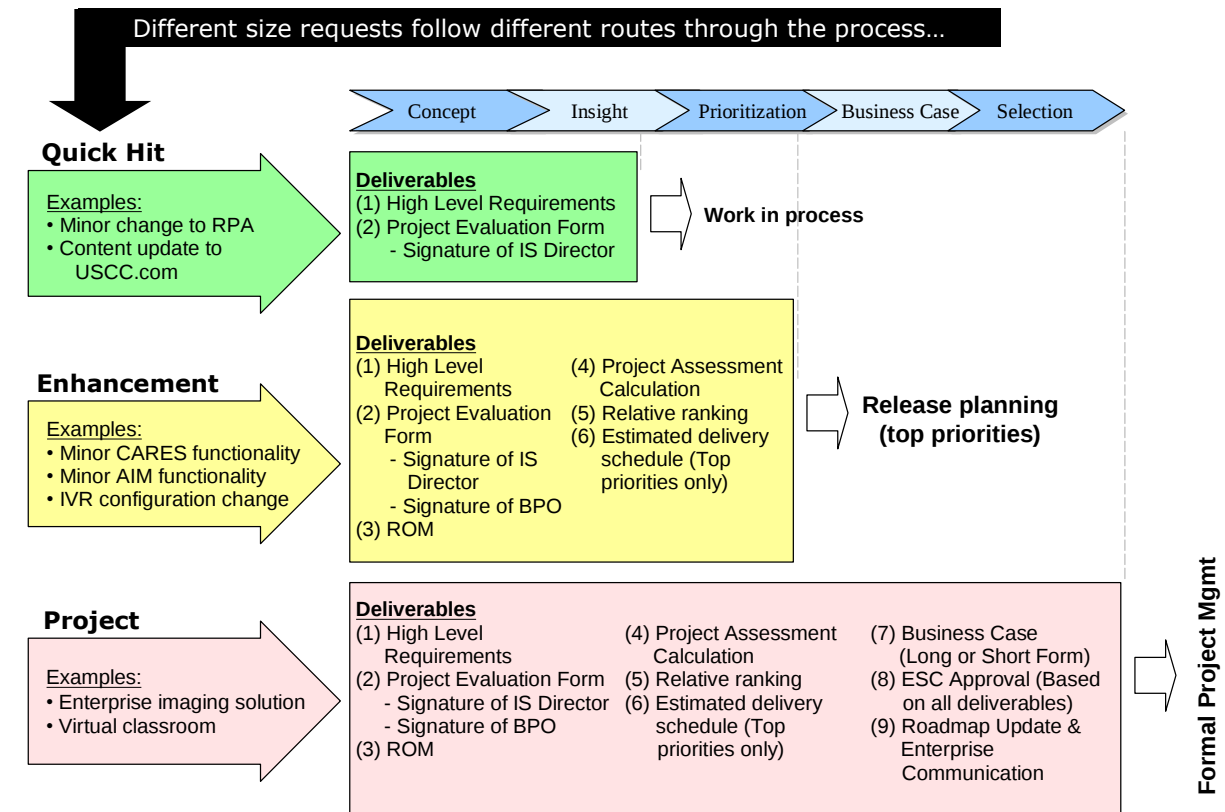
Project Assessment & Review: Overall Process Flow

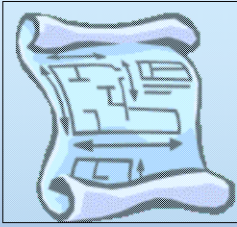


Project Assessment & Review: Request Sizes



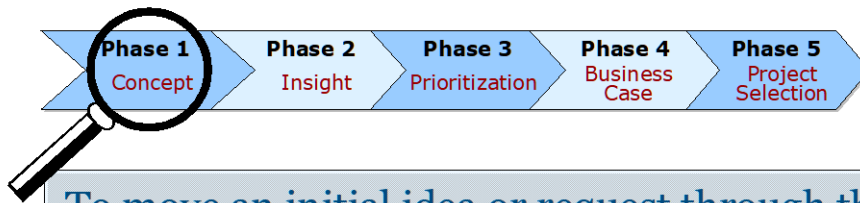
Project Assessment & Review: Request Sizes





Part 3: Phase Details

Phase 1: Concept — Purpose



To move an initial idea or request through these steps:

- Documentation in Request Central database
- Awareness of and agreement to request by:
 - Requester's manager,
 - Appropriate BPO, and
 - Appropriate BRD
- Appropriate negotiations with regard to request scope
- High-level statement of requirements
- High-level assessment of benefits

Phase 1: Concept — Inputs & Outputs

Inputs

Request submitted in Request Central

Step 1: Who is this request for?
 I am submitting this request for: ☒ Someone Else ☐ Myself
 Last Name: First Name: OR Emp/Contractor Number:

Step 2: Categorize the request.
 Search for a Request Type by clicking a button below.

 -OR- Search by Keyword or Phrase:

Outputs

High-level requirements

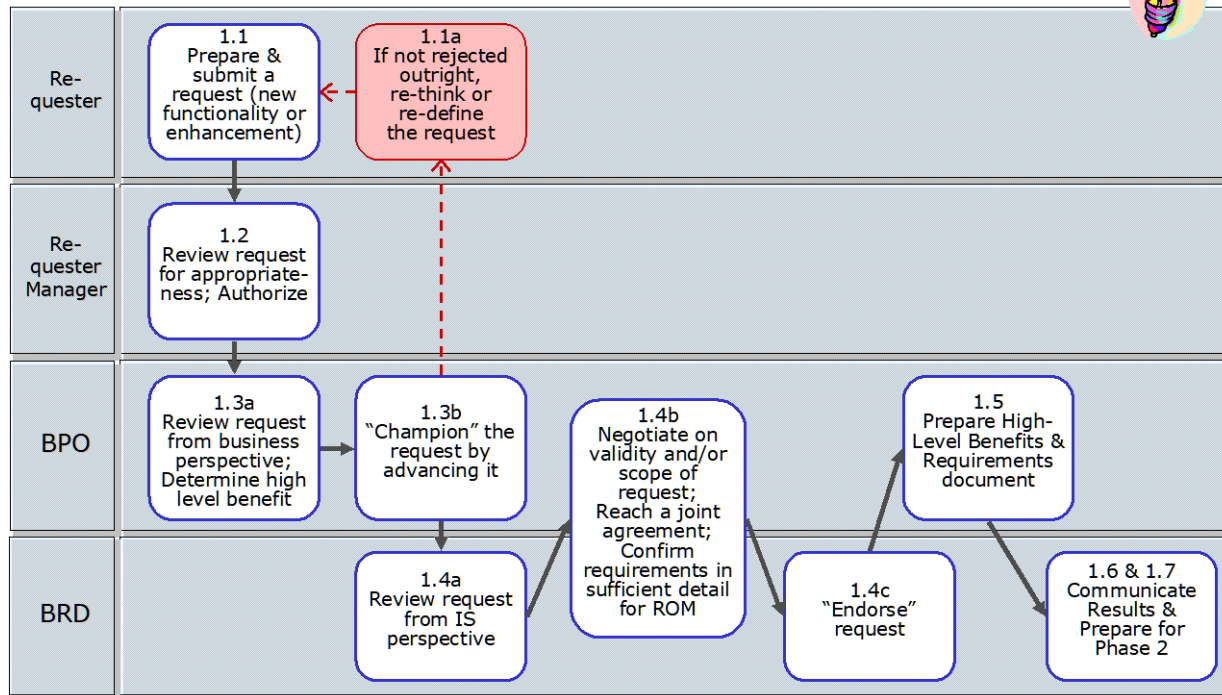
Business Requirements Statement	
1. Document Revision History	
Date first submitted:	Date last revised:
Current revision #: 1.0	Document status: Draft (X) Final ()
2. Identification Section	
Request Central #: RC00000000	Project:
Project/Request Name:	Author:
Document author:	
BRD/BRD:	BRD
BPO:	BPO
Stakeholders:	Stakeholders
3rd Party participants:	Participants
Budget Availability:	Budget
Systems impacted:	☐ CARES ☐ ARM ☐ Portal ☐ Maps ☐ Network ☐ Internet ☐ Intranet
Business units impacted:	☐ IT ☐ Marketing ☐ Customer Service ☐ Engineering ☐ Training ☐ Finance ☐ Legal ☐ Security ☐ Sales
	Other - please list:

High-level estimate of benefits

Project Evaluation Form

Project Name:
 Submitted:
 Approved by:
 Date:

Phase 1: Concept — Process Flow



Phase 1: Concept — Roles & Responsibilities



Type	Step	Role:	Requester	Requester's Manager	BPO	BRD	SD Teams	Prioritization Committee	ESC	Project Office (PPM)	Project Manager
	1.1. Present request (via Request Central)	R	D								
	1.2. Authorize request	D	R,S	D							
	1.3. Champion request (*)	D	D	R,S	D						
	1.4. Endorse request	D	D	D	R,S						
	1.5. High-Level Benefits and Requirements	D	D	R	D,A						
	1.6. Communicate results	C	C	C	R	C				C	
	1.7. Prep for Phase 2	D	D	D	R					F	

* For requests impacting Operations, a 2nd BPO approval is given here (at the VP level)

Types		Responsibility Codes	
	Gate; Decision		Communication of results
	Deliverables; Documents		Prepare for & proceed to Phase n
		• F: Facilitate	• R: (Primary) Responsibility
		• C: Copied on result	• D: Discuss; Provide input
		• A: Agree to	• S: Sign off; Approve



- ## Phase 2: Insight — Inputs & Outputs

Outputs

Rough Order of Magnitude (ROM)

Business Requirements Statement			
1. Document Revision History			
Date first submitted:		Date last revised:	
Current revision #:	1.0	Document status:	Draft: ☒ Final: ☐
2. Identification Section			
Request Central #:	RC00000000		
Project/Request Name:	Project		
Document author:	Author		
BUSINESS:	BRS		
BPO:	BPO		
Stakeholders:	Stakeholders		
3 rd Party participants:	Participants		
Budget Availability:	Budget		
Systems impacted:	☐ CARES ☐ AM ☐ Portal ☐ Maps ☐ Nexcom ☐ Internal ☐ Intranet ☐ Other please list:		
Business units impacted:	☐ IS ☐ Marketing ☐ Customer Service ☐ Engineering ☐ Training ☐ Finance ☐ Legal ☐ Security ☐ Sales Other - please list:		

Rough Order of Magnitude (ROM) Statement (Sample)														
4.1 - Breakdown Estimate Revision: 0.000000														
Parent & Plan Item		Material		Design		Construction		Paint		SCM/PM/CM		Total/Summary		Summary Item
		LCR	QTY	LCR	QTY	LCR	QTY	LCR	QTY	LCR	QTY	LCR	QTY	
00000000		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000001		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000002		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000003		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000004		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000005		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000006		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000007		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000008		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000009		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000010		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000011		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000012		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000013		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000014		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000015		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000016		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000017		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000018		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000019		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000020		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000021		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000022		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000023		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00	1.00	Material
00000024		10.00	1.00	0.00	0.00	1.00	1.00	1.00	1.00	0.00	0.00	12.00		

High-level estimate of benefits



Project Evaluation Form

Project Name _____

Office _____

Prepared By _____

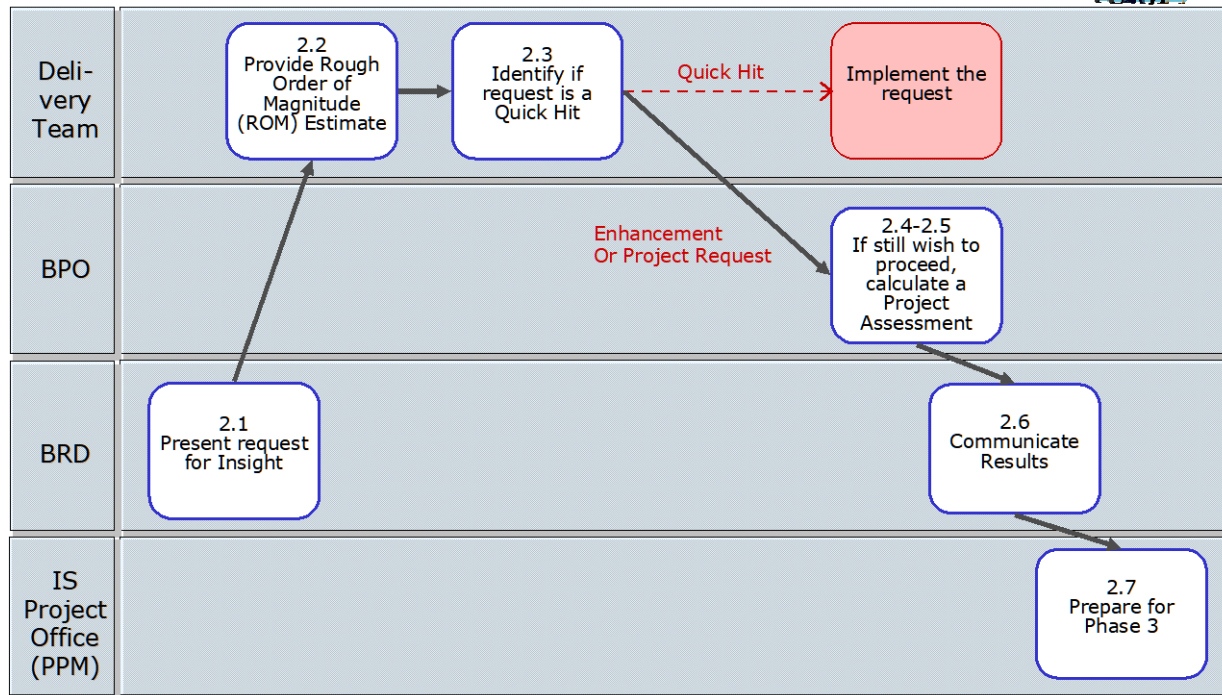
Date _____

Project Evaluation
Form (First Pass)

Completed Project
Assessment Calculation

Project Name/Activity	Phase	Start Date	End Date	Duration (Days)	Resources	Cost (\$)	Progress (%)	Notes
Project A: New Product Development	Phase 1: Planning	2023-01-01	2023-01-15	15	John Doe, Jane Smith	\$10,000	100	Completed
Project A: New Product Development	Phase 2: Design	2023-01-16	2023-02-15	31	John Doe, Jane Smith, Alex Brown	\$20,000	80	On Track
Project A: New Product Development	Phase 3: Development	2023-02-16	2023-03-15	30	Alex Brown, Sarah Green	\$25,000	50	Minor Delay
Project A: New Product Development	Phase 4: Testing	2023-03-16	2023-04-15	31	Sarah Green, Michael White	\$20,000	20	At Risk
Project A: New Product Development	Phase 5: Deployment	2023-04-16	2023-05-15	31	Michael White, Emily Black	\$15,000	10	Not Started
Project B: Marketing Campaign	Phase 1: Strategy	2023-01-01	2023-01-10	10	Emily Black, David Grey	\$5,000	100	Completed
Project B: Marketing Campaign	Phase 2: Creative Development	2023-01-11	2023-01-25	15	David Grey, Emily Black	\$8,000	90	On Track
Project B: Marketing Campaign	Phase 3: Execution	2023-01-26	2023-02-10	16	Emily Black, David Grey	\$12,000	70	Minor Delay
Project B: Marketing Campaign	Phase 4: Analysis	2023-02-11	2023-02-25	15	David Grey, Emily Black	\$7,000	40	At Risk
Project C: System Upgrade	Phase 1: Requirements	2023-01-01	2023-01-20	20	John Doe, Jane Smith, Alex Brown	\$15,000	100	Completed
Project C: System Upgrade	Phase 2: Design	2023-01-21	2023-02-10	21	John Doe, Jane Smith, Alex Brown	\$20,000	90	On Track
Project C: System Upgrade	Phase 3: Development	2023-02-11	2023-03-10	30	Alex Brown, Sarah Green	\$25,000	60	Minor Delay
Project C: System Upgrade	Phase 4: Testing	2023-03-11	2023-04-10	31	Sarah Green, Michael White	\$20,000	30	At Risk
Project C: System Upgrade	Phase 5: Deployment	2023-04-11	2023-05-10	31	Michael White, Emily Black	\$15,000	10	Not Started
Project D: Customer Support Portal	Phase 1: Planning	2023-01-01	2023-01-15	15	John Doe, Jane Smith	\$10,000	100	Completed
Project D: Customer Support Portal	Phase 2: Design	2023-01-16	2023-02-15	31	John Doe, Jane Smith, Alex Brown	\$20,000	80	On Track
Project D: Customer Support Portal	Phase 3: Development	2023-02-16	2023-03-15	30	Alex Brown, Sarah Green	\$25,000	50	Minor Delay
Project D: Customer Support Portal	Phase 4: Testing	2023-03-16	2023-04-15	31	Sarah Green, Michael White	\$20,000	20	At Risk
Project D: Customer Support Portal	Phase 5: Deployment	2023-04-16	2023-05-15	31	Michael White, Emily Black	\$15,000	10	Not Started

Phase 2: Insight — Process Flow



Phase 2: Insight — Roles & Responsibilities



Type	Step	Role:									
		Requester	Requester's Manager	BPO	BRD	SD Teams	Prioritization Committee	ESC	Project Office (PPM)	Project Manager	
	2.1. Present request for Insight				R				F		
	2.2. Provide ROM estimate					R			F		
	2.3. Identify Quick Hit 			A	D	R,S			F		
	2.4. Decide to proceed	D	D	R							
	2.5. Rate Project Assessment Calculation	D	D	R					F		
	2.6. Communicate results	C	C	C	R	C	C		F	C	
	2.7. Prep for Phase 3				D	D			R		

Types		Responsibility Codes	
	Gate; Decision		Communication of results
	Deliverables; Documents		Prepare for & proceed to Phase n
		- F: Facilitate - C: Copied on result - A: Agree to	- R: (Primary) Responsibility - D: Discuss; Provide input - S: Sign off; Approve



- ### Phase 3: Prioritization — Inputs & Outputs



Outputs

[illegible]

The screenshot shows a Microsoft Word document with a table. The table has two columns: 'Name' and 'Address'. The 'Name' column contains the following entries: 'John Doe', 'Jane Smith', 'Bob Johnson', 'Alice Brown', 'Charlie White', 'Diana Green', 'Eve Black', 'Frank Gray', 'Grace Gold', 'Henry Silver', 'Ivy Bronze', 'Jack Copper', 'Karen Iron', 'Leo Nickel', 'Mia Zinc', 'Noah Lead', 'Olivia Tin', 'Peter Platinum', 'Quinn Silver', 'Ryan Gold', 'Sara Bronze', 'Toby Copper', 'Uma Iron', 'Victor Nickel', 'Wendy Zinc', 'Xavier Lead', 'Yara Tin', 'Zoe Platinum'. The 'Address' column contains the following entries: '123 Main St', '456 Elm St', '789 Oak St', '101 Pine St', '202 Maple St', '303 Birch St', '404 Cedar St', '505 Willow St', '606 Spruce St', '707 Fir St', '808 Hemlock St', '909 Cypress St', '1010 Redwood St', '1111 Sycamore St', '1212 Dogwood St', '1313 Magnolia St', '1414 Tulip St', '1515 Poplar St', '1616 Cherry St', '1717 Peach St', '1818 Plum St', '1919 Apple St', '2020 Orange St', '2121 Lemon St', '2222 Lime St', '2323 Grapefruit St', '2424 Tangerine St', '2525 Citrus St', '2626 Mandarin St', '2727 Apricot St', '2828 Peach St', '2929 Cherry St', '3030 Apple St', '3131 Orange St', '3232 Lemon St', '3333 Lime St', '3434 Grapefruit St', '3535 Tangerine St', '3636 Citrus St', '3737 Mandarin St', '3838 Apricot St', '3939 Peach St', '4040 Cherry St', '4141 Apple St', '4242 Orange St', '4343 Lemon St', '4444 Lime St', '4545 Grapefruit St', '4646 Tangerine St', '4747 Citrus St', '4848 Mandarin St', '4949 Apricot St', '5050 Peach St', '5151 Cherry St', '5252 Apple St', '5353 Orange St', '5454 Lemon St', '5555 Lime St', '5656 Grapefruit St', '5757 Tangerine St', '5858 Citrus St', '5959 Mandarin St', '6060 Apricot St', '6161 Peach St', '6262 Cherry St', '6363 Apple St', '6464 Orange St', '6565 Lemon St', '6666 Lime St', '6767 Grapefruit St', '6868 Tangerine St', '6969 Citrus St', '7070 Mandarin St', '7171 Apricot St', '7272 Peach St', '7373 Cherry St', '7474 Apple St', '7575 Orange St', '7676 Lemon St', '7777 Lime St', '7878 Grapefruit St', '7979 Tangerine St', '8080 Citrus St', '8181 Mandarin St', '8282 Apricot St', '8383 Peach St', '8484 Cherry St', '8585 Apple St', '8686 Orange St', '8787 Lemon St', '8888 Lime St', '8989 Grapefruit St', '9090 Tangerine St', '9191 Citrus St', '9292 Mandarin St', '9393 Apricot St', '9494 Peach St', '9595 Cherry St', '9696 Apple St', '9797 Orange St', '9898 Lemon St', '9999 Lime St'. A red circle highlights the cell containing 'John Doe' in the 'Name' column. A red arrow points to the bottom of the circle.

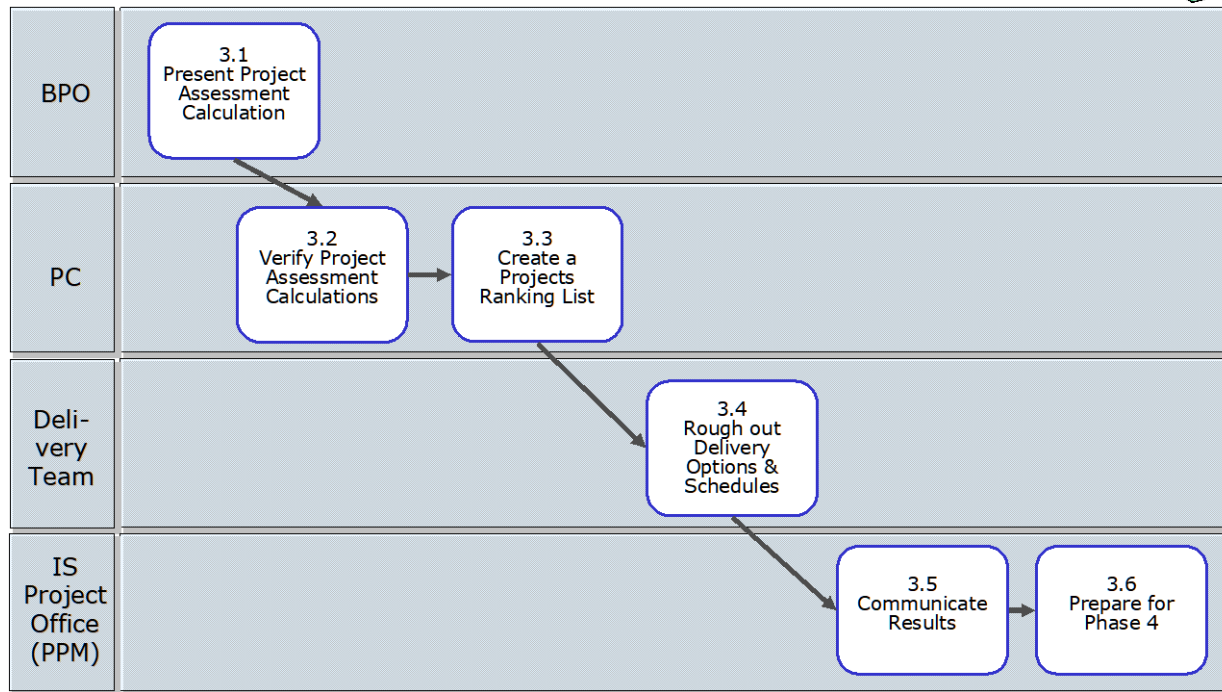
Project Evaluation Farm

Event / Day	Frequency
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

[illegible]

16

Phase 3: Prioritization — Process Flow



PC: Prioritization Committee

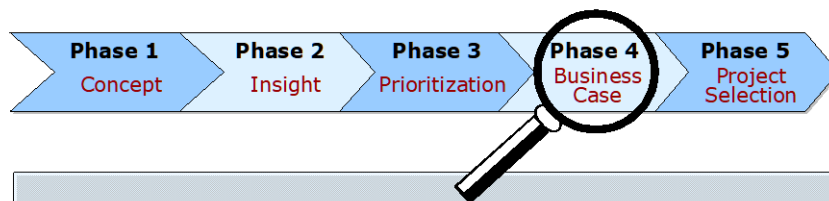
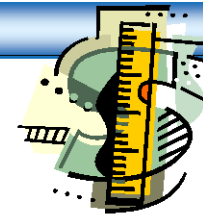
Phase 3: Prioritization — Roles & Responsibilities



Type	Step	Role:								
		Requester	Requester's Manager	BPO	BRD	SD Teams	Prioritization Committee	ESC	Project Office (PPM)	Project Manager
	3.1. Present Project Assessment Calculation			R					F	
	3.2. Verify PAC Ratings						R		F	
	3.3. Create Rankings List						R		F	
	3.4. Rough out Delivery Options & Schedules		D	D,A	D,A	R			F	
	3.5. Communicate results	C	C	C	F	C	C		R	C
	3.6. Prep for Phase 4			D	D	D			R	

Types		Responsibility Codes	
	Gate; Decision		Communication of results
	Deliverables; Documents		Prepare for & proceed to Phase n
		- F: Facilitate - C: Copied on result - A: Agree to	- R: (Primary) Responsibility - D: Discuss; Provide input - S: Sign off; Approve

Phase 4: Business Case — Purpose



For the highest-priority requests on the Rankings List:

- Present high-level costs, benefits & rough timeframes to the Executive Steering Committee (ESC)
- Based on ESC feedback, identify the highest-priority requests that need to have more detailed Business Cases written
- For those requests, develop the Business Cases, forming teams to develop them where necessary

Phase 4: Business Case — Inputs & Outputs



Inputs

Project Inventory Ranking

Proj	Proj Name	Proj ID	Proj Status	Proj Priority	Proj Category	Proj Sub-category	Proj Manager	Proj Start Date	Proj End Date	Proj Duration	Proj Budget	Proj Risk	Proj Impact
1	IT System Upgrade	IT001	Active	High	IT	System Upgrade	John Doe	2023-01-01	2023-12-31	12 months	\$500,000	Medium	High
2	IT System Upgrade	IT002	Active	Medium	IT	System Upgrade	Jane Smith	2023-03-01	2023-09-30	7 months	\$250,000	Low	Medium
3	IT System Upgrade	IT003	Active	Low	IT	System Upgrade	Mike Johnson	2023-06-01	2023-06-30	1 month	\$100,000	Low	Low
4	IT System Upgrade	IT004	Active	High	IT	System Upgrade	Sarah Lee	2023-07-01	2023-11-30	5 months	\$300,000	Medium	High
5	IT System Upgrade	IT005	Active	Medium	IT	System Upgrade	David Kim	2023-08-01	2023-08-31	1 month	\$150,000	Low	Medium
6	IT System Upgrade	IT006	Active	Low	IT	System Upgrade	Emily White	2023-09-01	2023-09-30	1 month	\$100,000	Low	Low
7	IT System Upgrade	IT007	Active	High	IT	System Upgrade	Frank Brown	2023-10-01	2023-10-31	1 month	\$150,000	Low	Medium
8	IT System Upgrade	IT008	Active	Medium	IT	System Upgrade	Grace Green	2023-11-01	2023-11-30	1 month	\$100,000	Low	Low
9	IT System Upgrade	IT009	Active	Low	IT	System Upgrade	Henry Black	2023-12-01	2023-12-31	1 month	\$100,000	Low	Low
10	IT System Upgrade	IT010	Active	High	IT	System Upgrade	Ivy Grey	2024-01-01	2024-01-31	1 month	\$100,000	Low	Low

Estimated Delivery Schedule

Outputs

Business Case

Business Initiative Definition
Page 3 of 11

Initiative Name: _____

A. Business Initiative Summary

1. Business Case Name _____

2. Business Case Ownership Name: _____
[The coordinator of the business case development]

3. Business Initiative Description

Scope

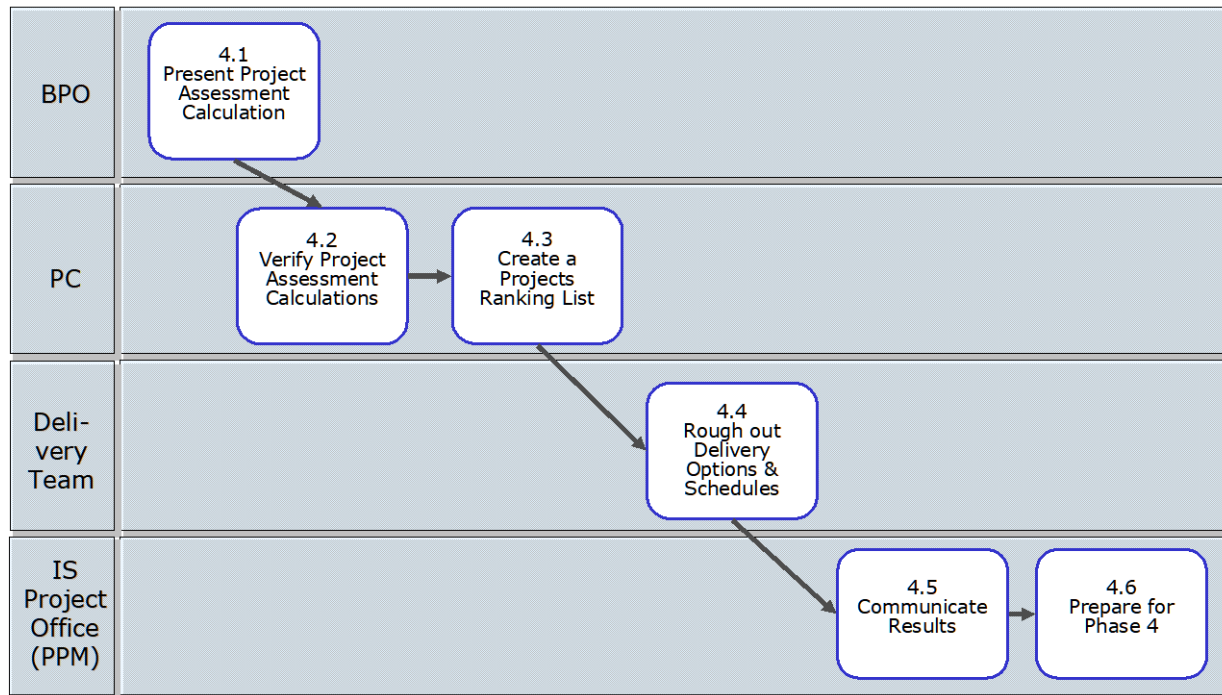
Select the Strategic Capital Spending Category
(Double click the box and select Default Value "Checked")

☐ Mandates	☐ Obsolescence
☐ Growth in Existing Markets	☐ Base Business Support
☐ Growth in New Markets	☐ Risk Management
☐ New Products/ Service	☐ Customer Satisfaction
☐ Productivity Increases	

4. Financial Summary

Length of financial models (in years): _____

Phase 4: Business Case — Process Flow



PC: Prioritization Committee

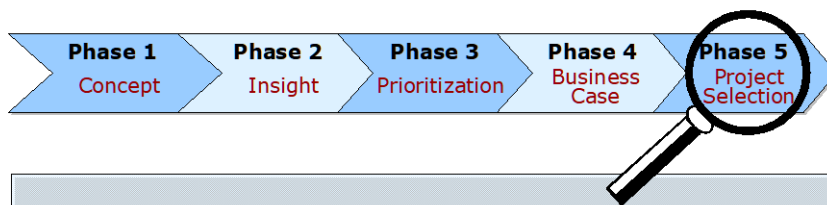
Phase 4: Business Case — Roles & Responsibilities



Type	Step	Role:								
		Requester	Requester's Manager	BPO	BRD	SD Teams	Prioritization Committee	ESC	Project Office (PPM)	Project Manager
	4.1. Present Rankings List for ESC Review			F	F	F			R	
	4.2. Verify Rankings							R		
	4.3. Develop Business Cases	D	D	D,S	R	D,S			C	D
	4.4. Communicate results								R	C
	4.5. Prep for Phase 5								R	

Types		Responsibility Codes	
	Gate; Decision		Communication of results
	Deliverables; Documents		Prepare for & proceed to Phase n
		- F: Facilitate - C: Copied on result - A: Agree to	- R: (Primary) Responsibility - D: Discuss; Provide input - S: Sign off; Approve

Phase 5: Project Selection — Purpose



For those highest-priority requests that have had Business Cases developed:

- Have the appropriate business manager present the Business Case to the Executive Steering Committee
- Obtain ESC feedback on Business Case details
- Obtain ESC feedback on relative priority of projects
- Update the USCC Project Roadmap and communicate its updates across the organization

Phase 5: Project Selection — Inputs & Outputs



Inputs

Business Case

Business Initiative Definition
Page 3 of 11

Initiative Name: _____

A. Business Initiative Summary

1. Business Case Name _____
2. Business Case Ownership Name: _____
(The coordinator of the business case development)
3. Business Initiative Description
Scope
Select the Strategic Capital Spending Category
(Click the box and select Default Value "Checked")

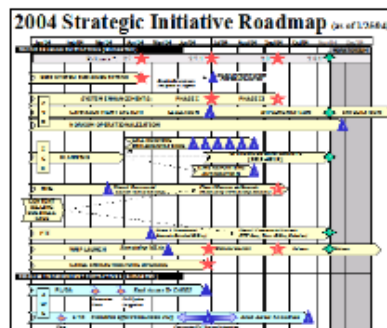
☐ Mandates	☐ Obsolescence
☐ Growth in Existing Markets	☐ Base Business Support
☐ Growth in New Markets	☐ Risk Management
☐ New Products/ Service	☐ Customer Satisfaction
☐ Productivity Increases	
4. Financial Summary
Length of financial models (in years): _____

Outputs

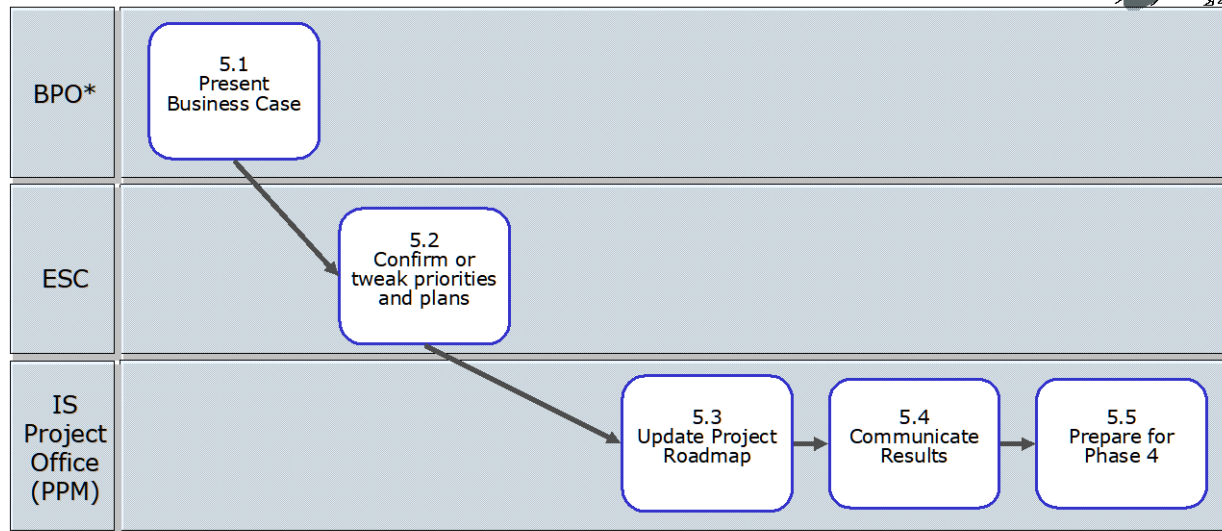
Formal Decision Communication



Updated Roadmap



Phase 5: Project Selection — Process Flow



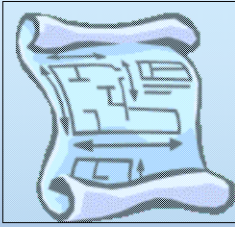
BPO*: Business Process Owner (or Project Sponsor, if identified)
 ESC: Executive Steering Committee

Phase 5: Project Selection — Roles & Responsibilities



Type	Step	Role:								
		Requester	Requester's Manager	BPO	BRD	SD Teams	Prioritization Committee	ESC	Project Office (PPM)	Project Manager
	5.1. Present Business Case			R	D,F					
	5.2. Confirm or tweak Priorities							R		
	5.3. Update Project Roadmap								R	
	5.4. Communicate results								R	
	5.5. Prep for Phase 6								R	

Types		Responsibility Codes	
	Gate; Decision		Communication of results
	Deliverables; Documents		Prepare for & proceed to Phase n
		- F: Facilitate - C: Copied on result - A: Agree to	- R: (Primary) Responsibility - D: Discuss; Provide input - S: Sign off; Approve



Part 4: Request Central

The PAR Process: When is it Used?

Types of Requests in Request Central

I.S. Request to Add or Change a System

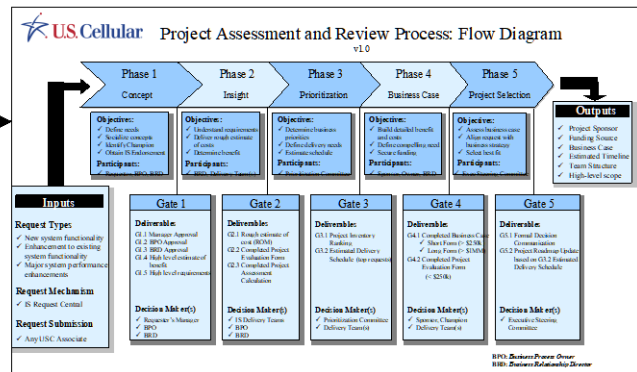
- New Functionality/Enhancements
 - Reporting
 - Data Warehouse
 - Information Updates
 - CARES Letters, Profiles and Printers

I.S. Request for an Individual

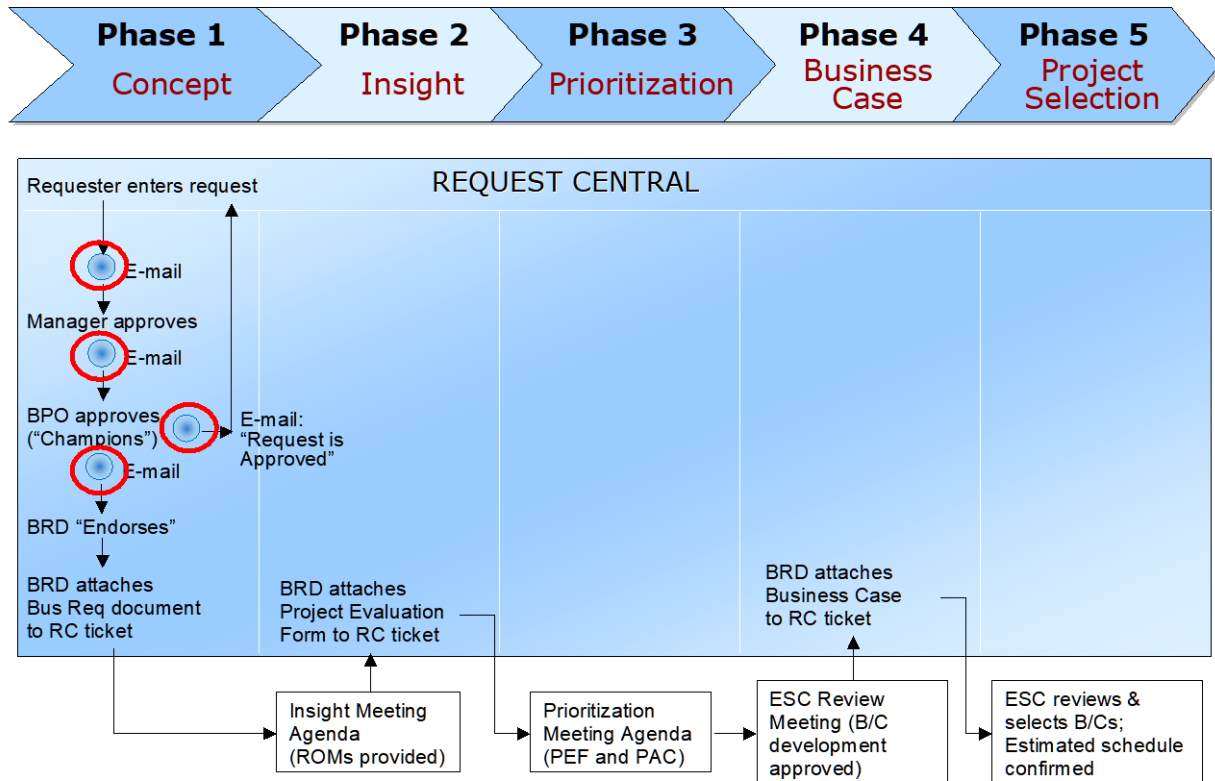
- New Hire
- Transfer
- Termination
- Existing Associate Name Change
- Hardware or Telephony
- Software
- Security Access adds and upgrades

Other I.S. Routine Requests

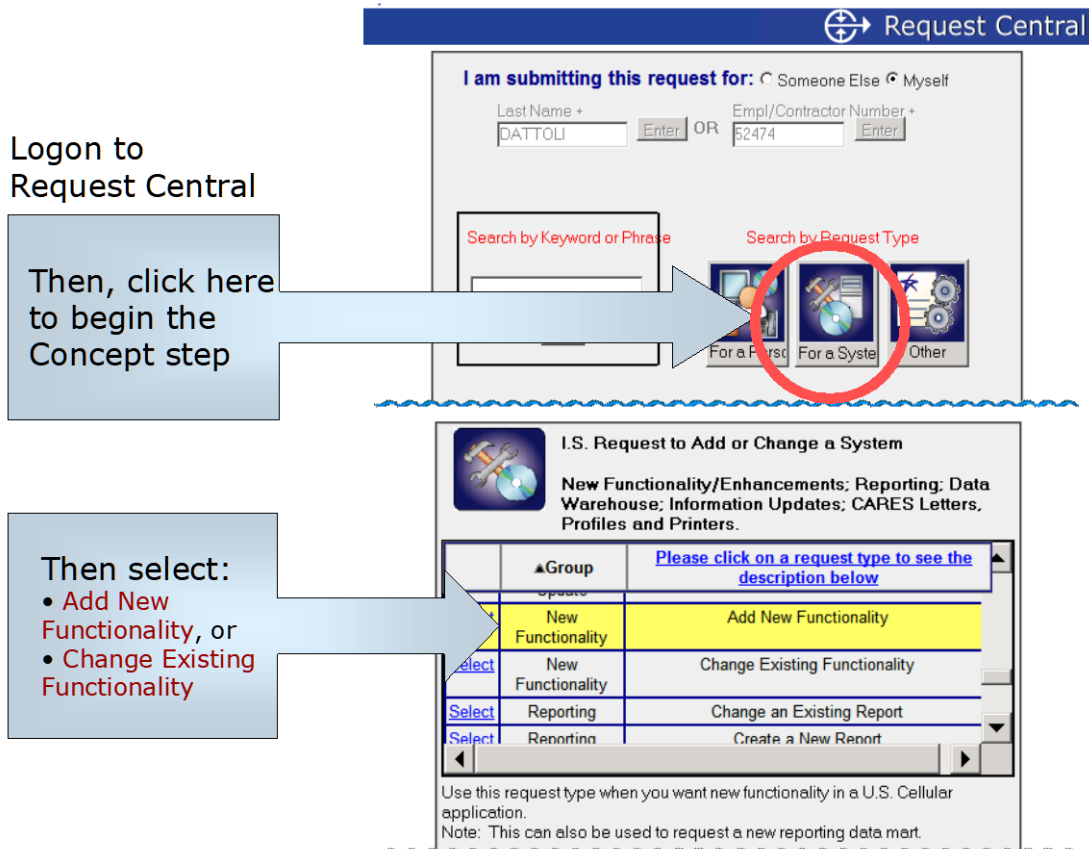
- New Shared Drives and Folders
- Distribution Lists
- Non-personal Mailboxes
- Moves



The PAR Process in ISRC



Request Central: Concept Initiation



Request Central: Concept Initiation

The diagram shows a web form for initiating a request. Callouts provide context for specific fields:

- Proceed to enter request data:** Points to the main form area.
- This is a high-level overview used in reports:** Points to the 'Brief description of your request' field.
- This field is used to populate the next field:** Points to the 'Primary Area Impacted' dropdown.
- This field is used to identify the BPO who will be asked to approve the request:** Points to the 'Primary Process Impacted' dropdown.

Form fields include:

- I am requesting: Add New Functionality
- Brief description of your request (limited to 255 characters)
- This type of request will require business process owner approval. Please select the business area that is primarily impacted and should be approving.
- Primary Area Impacted
- Primary Process Impacted
- < Back
- Next

- As you enter data, answer any questions that you may be prompted for.
- Then, verify the contact data.

Request Central: Concept Initiation

The diagram shows the 'When complete, Submit the request' step. A callout points to the 'Submit Request' button. The form displays the following details:

Status	Request ID	Type Description	Requester
Draft	RC00000291	Change Existing Functionality	Requester MARK DA
Opened	2/4/04 4:09:53	Brief Description of the Request (255 char) Add advanced data elements to PMO Data Warehouse	Requester MARK DA

Request Details: Benefits, Contact Info

Missing Info Edit Response

Audience	Information Requirement	Response
Requestor	What is the new functionality that you are requesting? (attach additional information below)	Add project metrics
Requestor	Primary Application	Portfolio Data Warehouse

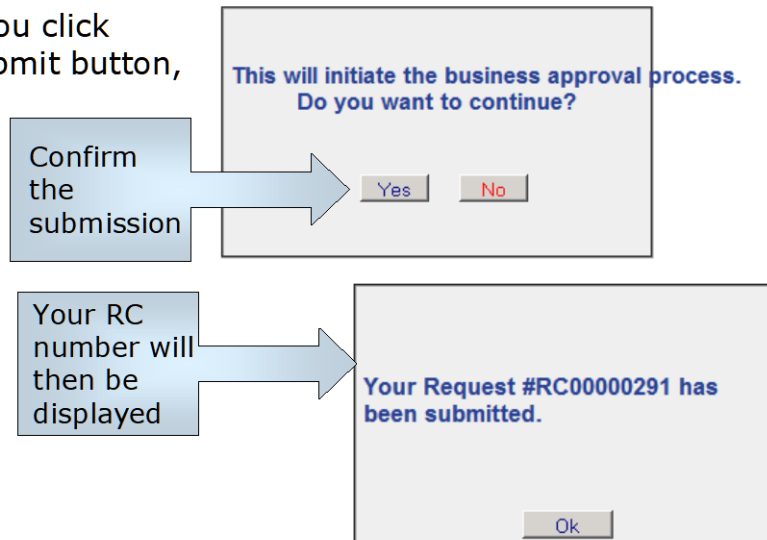
Requested Date: 4/28/04

Tip: Override this date with your specific, desired date.

Note that this Requested Date is defaulted based on service levels defined for the type of request

Request Central: Concept Initiation

After you click the Submit button,

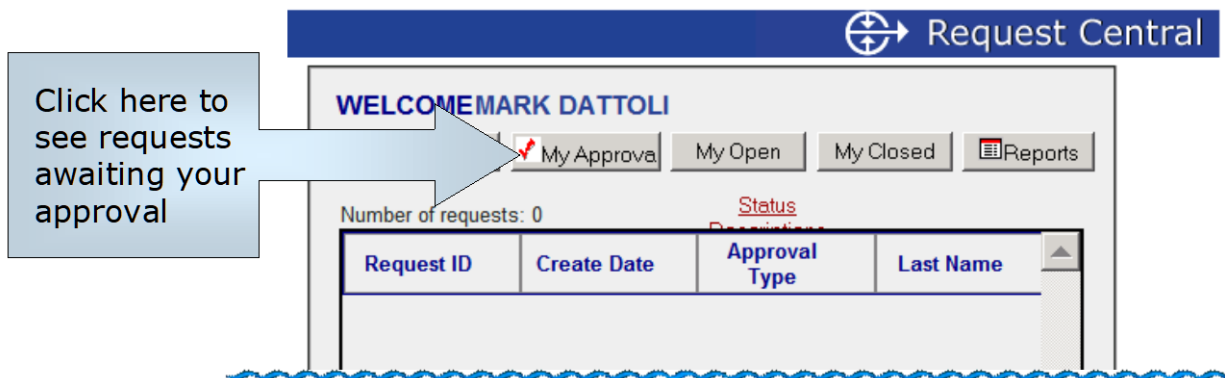


This completes the request submission. Request Central will e-mail your manager for approval; after which the appropriate BPO will be e-mailed for their approval.

— At this point, the ISRC system tags the request as "Approved." —
Then, the appropriate BRD will be e-mailed to give their Endorsement.

Request Central: Championing a Request

A BPO will "champion" a request using the standard approval process in Request Central.



Request Central: Endorsing a Request

A BRD will
"Endorse" a
request using the
Control Panel in
Request Central.

Open Form ☐ Search ☒ New

Refresh Tables

Service Request+ RC00000708 Task ID+

Count 0

My Requests

Request ID	Date	First Name	Last Name	Requested Deliv	City
------------	------	------------	-----------	-----------------	------

SearchTasks

Count 0

My Tasks

Request ID	Date Appro	City	Task	Task Status	Requested Deliv	Re
------------	------------	------	------	-------------	-----------------	----

My Teams Roles & Tasks

Display Requests: Team

Specific Team BRM - Cust Svc, Fin S

View by: ☒ Roles ☐ Tasks

Count 3

Team	Date	Resource I	City	Request ID	Task	Task Status
BRM - Cust Svc			Chicago	RC00000158	Endorse - Determine	New
BRM - Cust Svc			Chicago	RC00000203	Endorse - Determine	New
BRM - Cust Svc		ch1gt0e1	Knoxville	RC00000515	Determine assignment	Assigned