IT Portfolio Management and the Project Request Process

a Xavier Technology Committee Initiative
Portfolio Management is about approving the right projects, delivering the right resources at the right time, managing the project managers, and ensuring closure.
Strategic Goal:
Create a structured portfolio process that starts with strategic objectives

Strategic initiatives should account for 60% of the project portfolio

- Teaching and Learning Solutions: 30% of project portfolio
- Customer Service Solutions: 20% of project portfolio
- Informed Business Decision Making: 10% of project portfolio

Operational initiatives should account for 40% of the project portfolio

- Operational Process Improvement: 25% of project portfolio
- Infrastructure Renewal: 10% of project portfolio
- Infrastructure R&D: 5% of project portfolio
The IT Portfolio Management process has been refined to support these goals

<table>
<thead>
<tr>
<th>Process</th>
<th>Description</th>
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<tbody>
<tr>
<td>Project Requests</td>
<td>Simplified process makes it easier to submit an IT project request</td>
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<tr>
<td>Business Case</td>
<td>Higher value business case demonstrates strategic alignment, costs, and benefits</td>
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<tr>
<td>Scoring</td>
<td>University strategic alignment and budget and resource costs are now strong factors in the scoring result</td>
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<tr>
<td>Monthly Approvals by XTC</td>
<td>Approvals reflect the Business Case score along with the availability of budgeted resources for the related strategic initiative</td>
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IT Project Request Process: Workflow

CHANGE REQUEST:
IT Change Requests are low-effort and require technology resources that generally include one or more of the following:
- Date or term changes
- Minor changes to existing system integrations
- Regulatory or compliance updates
- Manual job runs

PROJECT:
Technology Project Requests require technology resources that generally include one or more of the following:
- New software development or implementation
- Software integration between Banner modules and/or disparate systems
- Process re-engineering efforts
- Vendor selection initiatives
Xavier leverages a project and portfolio management tool called TeamDynamix.

The project request forms are located within and are used to begin building your electronic business case. Click here (TBD) for detailed instructions.

TeamDynamix Log in Instructions:  (VPN Access required if outside of the Xavier network)

1. Go to http://projects.xavier.edu/TDClient/Login.aspx
2. Log in using your Xavier credentials
3. Go to “Requests” Tab (top)
4. Click on “Service Catalog” (left)
5. Click on “I.T. Project Request Forms”
6. Select the appropriate request form to enter your Change or Business Case