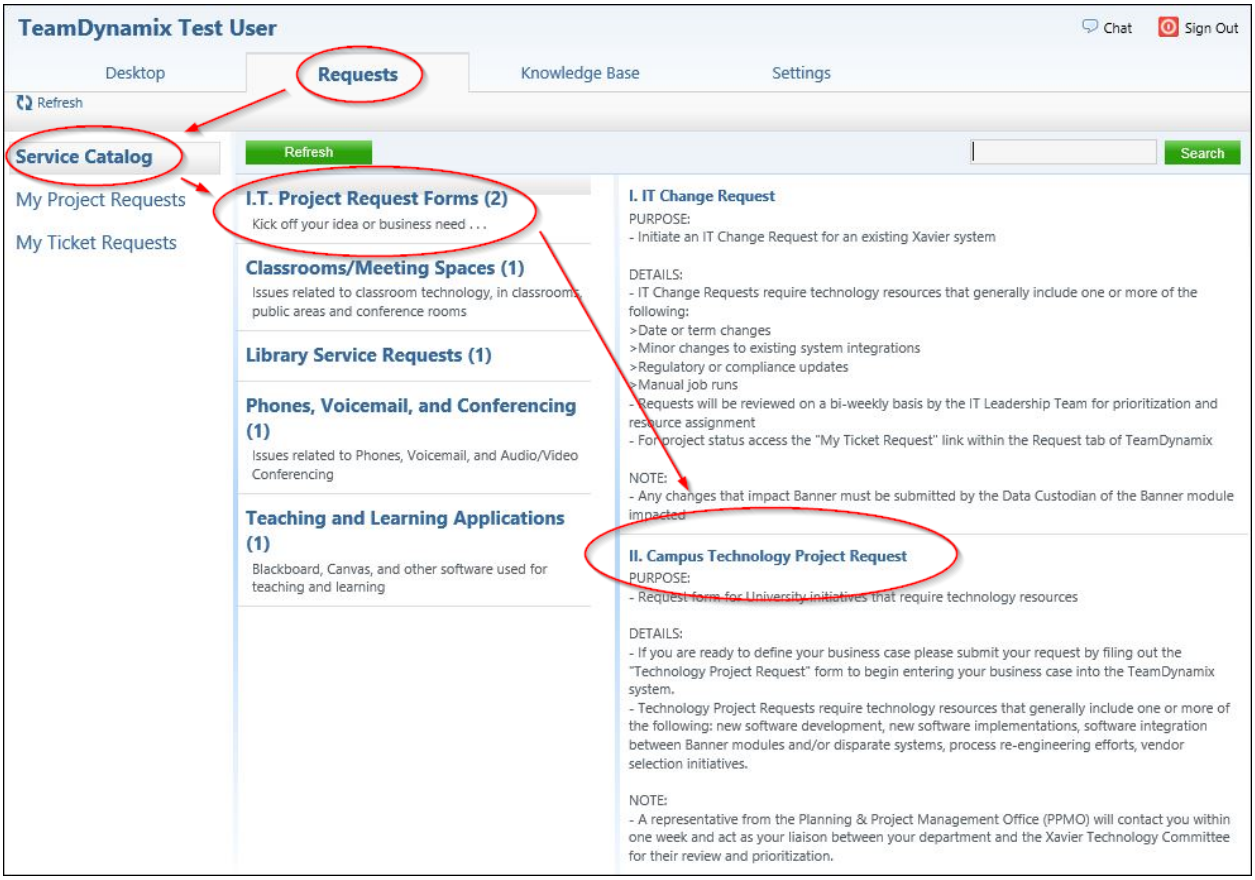
I. Creating a Project Request in TeamDynamix: Defining

Project Request Site: https://projects.xavier.edu/TDClient/Login.aspx

This section will describe the details to create a project request. A project request can be submitted by an authenticated Xavier user through the TDClient framework via the Service Catalog.

Once authenticated, click on **Requests > Service Catalog > I.T. Project Request Forms > Campus Technology Project Request** as shown below.



a. Request Types:

1. **IT Change Request:** A change request involves a small system update that generally consists of one or more of the following: Date or term changes, minor changes to existing system integrations, regulatory or compliance updates, manual job runs.
2. **Campus Technology Project Request: Xavier Technology Committee (XTC) Approval Needed**
    a. **Small:** A midsize project request which generally includes hardware, software, and/or consulting dollars, one or more departments and several technology resources
        i. Criteria consists of one or more of the following:
            1. Approx. 40-150 hours of effort
            2. Average financial investment
            3. Cross-departmental initiative

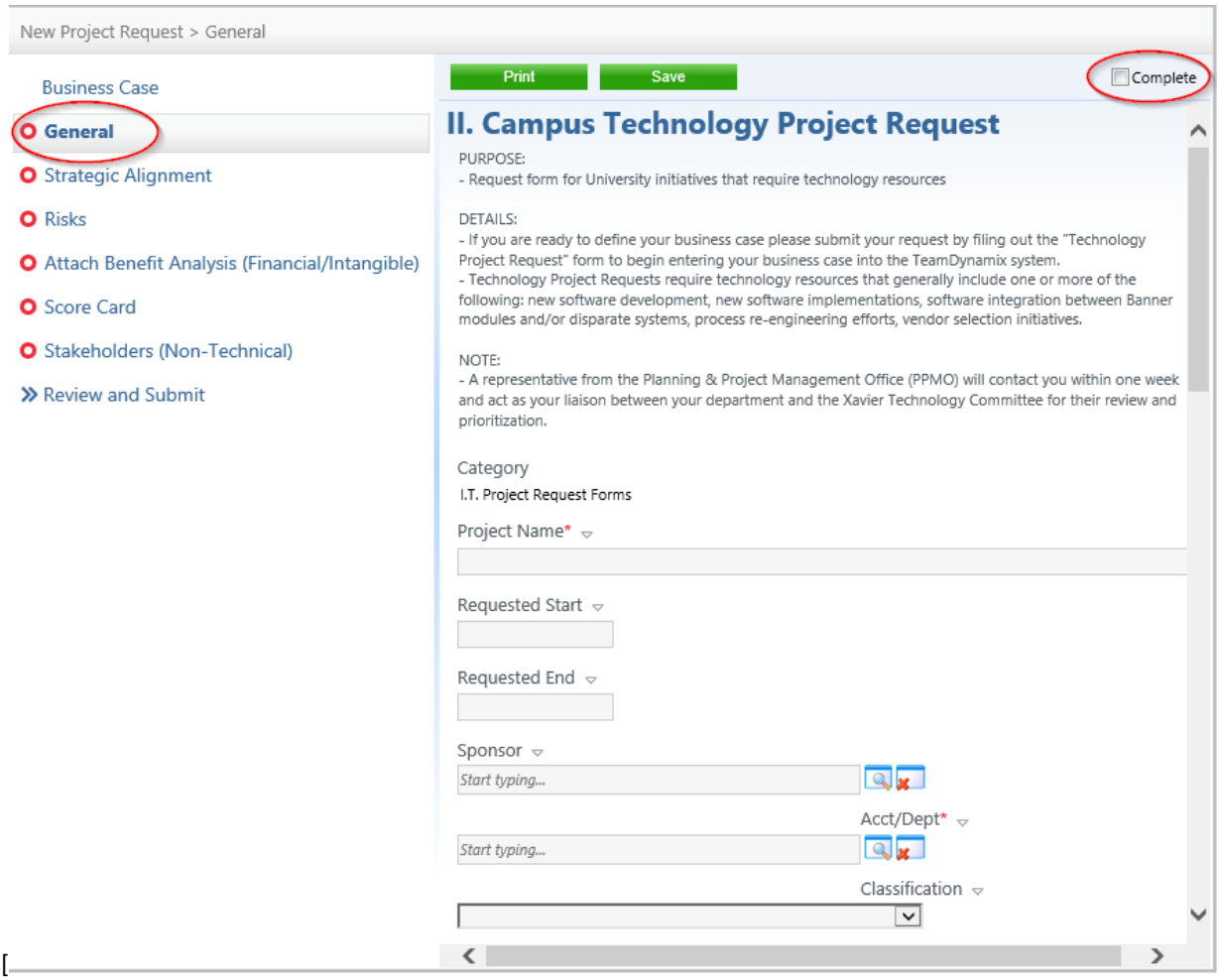
    b. **Large:** A University-wide project initiative which generally includes hardware, software, and/or consulting dollars, many cross-functional departments, and several technology and subject-matter resources.

i. Criteria consists of one or more of the following:
   1. Greater than 150 hours of effort
   2. Large financial investment
   3. University-wide engagement
   4. Full capabilities of the Planning and Project Management Office are recognized

b. Business Case Model of the Project Request

The project request is setup in a business-case format to assist in the evaluation of the project selection process to ensure that it is prioritized and meets the strategic goals based upon the criteria defined in the project request process.

When a new **Campus Technology Project Request** is opened, the window opens on the '**General**' section of the project request **'Business Case'**.



II. Project Request Sections:

The '**Project Request**' window divides the information into a business case-style format with 6 possible sections (**General, Strategic Alignment, Risks, Benefits, Score Card, and Stakeholders**).

Each section must be filled out and marked **Complete** (upper-right box) before the remaining business case sections can be filled out. The requestor is able to fill out the remaining business case sections of the project request in any order, or if needed, data can be saved and completed at a later time.

a. General:

i. **Project Name** – unique identifier for the project request
ii. **Requested Start/Finish** – Suggest a timeframe should the request be approved
iii. **Sponsor** – Who is responsible for the project request and business case?
iv. **Acct/Dept** – Which department is sponsoring the project?
v. **Classification** – Maintenance, Operations, or Projects
vi. **Priority** – High, Medium, Low
vii. **Description** – a quick overview of the purpose or problem being solved
viii. **Requirements** – **Do not** need to fill out the 'Requirements' field at this time. A Planning and Project liaison will work with the sponsor and stakeholders to gather detailed requirements once the business case has been approved.
ix. Logistics:
    i. **Category** – Helps to further identify the request for reporting and categorization purposes
    ii. **Division** – Which division is sponsoring the project?
    iii. **Has funding been secured?** – Yes, No, N/A
    iv. **Funding Source** – How are the funds secured?
x. **Project Definition**:
    i. **Alternative Solutions** – What alternatives have been considered to solve the problem?
    ii. **Success Criteria** – List measurements that would assure the project was successfully implemented and the problem will be solved
    iii. **Conclusion and Recommendation** – Outline how the organization should address the problem

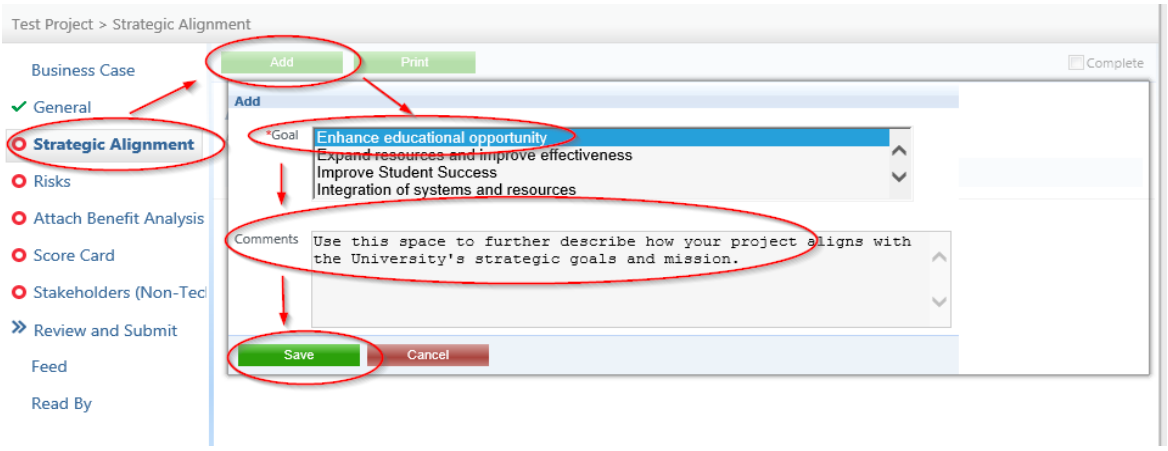
The requestor is able to click on the buttons to the left of each Business Case section and go between each section in varying order. The indicator changes from to when each section has been marked '**Complete**'.

All required fields in each business case section are indicated by a red asterisk '*'. When the user clicks onto the data-entry field, a basic field description will be displayed to the right of the window.

b. Strategic Alignment:

In the analysis of the business case of a project request, it is important to identify how the request aligns with the University's strategic goals and initiatives.

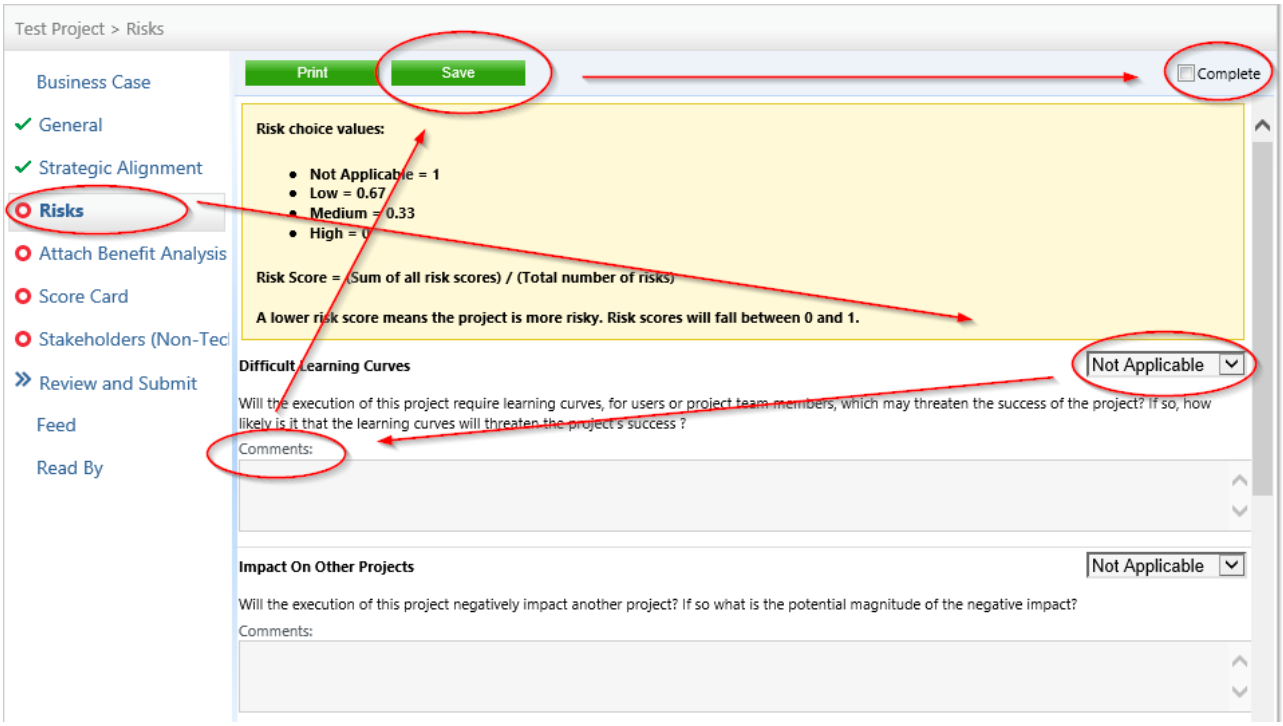
i. Click on **'Strategic Alignment'** > **Add** > Highlight a University **'Goal'**
ii. Add **'Comments'** to describe to further qualify
iii. Click **'Save'**



c. Risks:

Project risk management is the act of identifying, analyzing, and responding to risk throughout the life of a project. The **Risks** identified in the table below are some common types of risks that may be associated with a typical project. When risk management is effective, it results in fewer problems, and in those problems that do exist, it results in resolutions being handled more quickly. These identified potential risks may not materialize; the project manager monitors, evaluates, and responds to Risks during the life of a project.

Choose one of the following from the selection list for each Risk: **Not Applicable**, **High**, **Medium**, **Low**. The weighting of these risks for reporting purposes is determined in the Admin tool in Risk configuration.



d. Benefit Analysis:

The **Benefit Analysis** section in the project request Business Case is used to provide both tangible and intangible benefits which may be used to make an analysis on project costs and benefits especially when there are competing projects that would have resource bottlenecks.

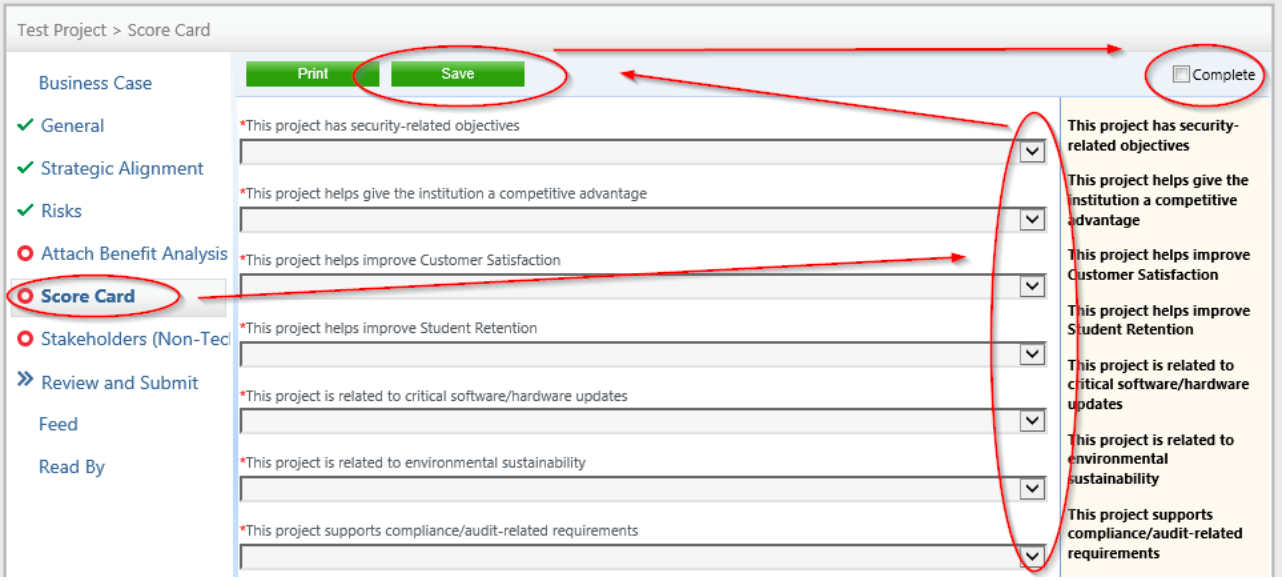
Click on '**Attach Benefit Analysis**' under the Business Case list on the left-side of the screen to display the Business Case Benefits screen.

This provides the requestor with an upload feature to attach a generic Cost Benefit Analysis or ROI template.

NOTE: Contact the Planning and Project Management Office to obtain a sample template.

e. Score Card

The **Scorecard** section provides a "needs assessment" that is used to further qualify the request based on a set of criteria that directly affects the environmental, cultural, business, and strategic components as drivers for informed decision-making.



f. Stakeholders

Add the external and internal stakeholders and business resources (functional) needed for decision-making and/or performing the work on the project. A more detailed "Roles and Responsibilities" list will be generated once the project has been approved.

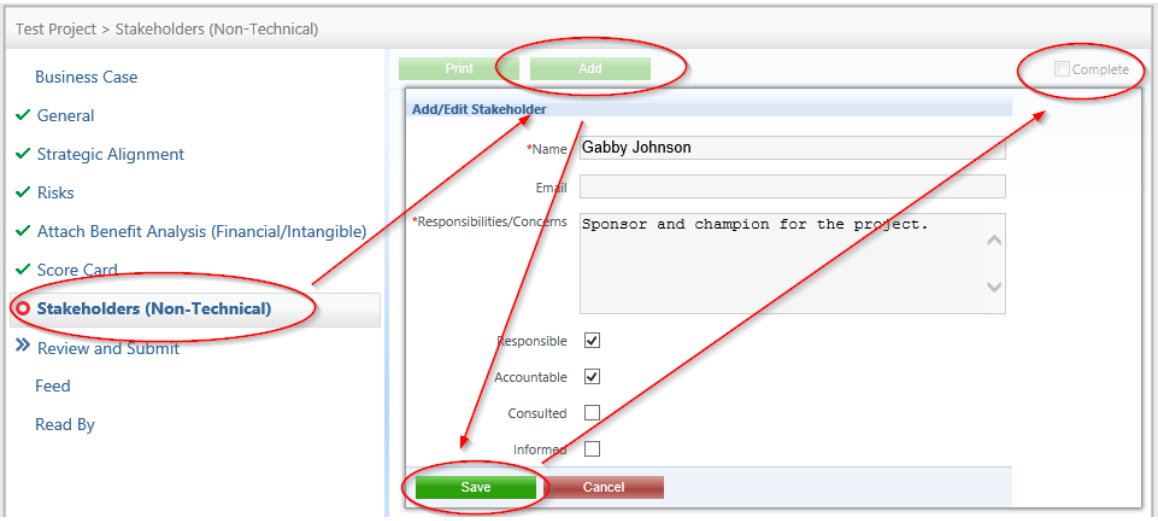
Categories:

i. **Responsible:** Those who do the work to achieve the task.

ii. **Accountable:** The one ultimately answerable for the correct and thorough completion of the deliverable or task, and the one who delegates the work to those responsible. In other words, an accountable must sign off (approve) on work that responsible provides.

iii. **Consulted:** Those whose opinions are sought, typically subject matter experts, with whom there is two-way communication.

iv. **Informed:** Those who are kept up-to-date on progress, often only on completion of the task or deliverable; and with whom there is just one-way communication.



g. Review and Submit:

Once you have completed all sections and marked each section as 'Complete':

i. Click on **'Review and Submit'**
ii. Click on **'Submit for Review'**
iii. Click **'OK'** to finalize the submission
iv. You can review your request as submitted

h. Next Steps:

i. A liaison from the IT Planning and Project Management Office will contact you within 5 business days to schedule a follow-up discovery session and to answer questions related to the Project Request process.
ii. You can review the status of your request by visiting the TeamDynamix landing page https://projects.xavier.edu/TDClient/Login.aspx