A function, feature or data are not working as expected in an university system. Something that normally works needs to be fixed.

Is this a Project, Break Fix or Enhancement?

- This is a request for new functionality or software systems or will require monetary investment or take more than 6 weeks.
- This is a minor enhancement or configuration request that will not require additional costs and can be performed by internal resources in 6 weeks or less.

Put in a helpdesk ticket to initiate the helpdesk process.

Initiate this process by making the enhancement request in SNOW.

Start the Project Initiation Process: See Workflow Page 2.
### Workflow for Project Intake, Scope Change and Prioritization

<table>
<thead>
<tr>
<th>Requestor / Business Unit</th>
<th>PMO</th>
<th>Delivery Groups (IT ESS, EAS, TSS, TTI, External, Etc.)</th>
<th>Executive Committee</th>
<th>Board of Trustees and President</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>START:</strong> Requests for a new project or major scope changes or deviations from approved plans for any items requiring funding or taking more than 6 weeks of effort.</td>
<td>Assigned Project Director reviews request and provides templates and guidance in defining the preliminary Business Case</td>
<td>Business Case Document is Reviewed with Technical teams to define assessment team and to Develop Architecture and Technical Requirements</td>
<td>Reviews Summary and Alternatives as presented by Business Sponsors</td>
<td>Approved to Proceed (Non-contingency) or Rejected (Contingency). Declined or Deferred if necessary.</td>
</tr>
<tr>
<td>An estimation coordinator will be assigned to assist with completing Project Intake Document and shepherd the request to the various stakeholders throughout this process.</td>
<td>Project Director Verifies that estimates include all resource costs, clearly in scope, and total cost of ownership, including ongoing administrative needs. The assigned PM must work with all supporting business units.</td>
<td></td>
<td>Presidents Office determines approval and routing.</td>
<td>Business Case presented to Board of Trustees</td>
</tr>
<tr>
<td>Estimation Coordinators Assigned as follows: Application Related Requests: EAS, Infrastructure: ETS, Desktop/AV Related, TSS, All others, PMO or as appropriate.</td>
<td>Requirements and Architecture are used to determine levels of effort and incremental resources.</td>
<td></td>
<td>Business Case presented to Board of Trustees</td>
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</tr>
<tr>
<td>The total project cost, effort, risks, and Business Case estimates are revised and documented in a project definition document. (Responsibility of Estimation Coordinator, Accountability of Business Unit Sponsor)</td>
<td></td>
<td></td>
<td>Assesses and determines Approval, Rejection or Alternative.</td>
<td></td>
</tr>
<tr>
<td>Key elements: Implementation and ongoing costs, benefits, resources required, organizational impacts, risks, mitigation plans, regulatory concerns (ADA, FERPA, Section 508, HIPAA, GDPR), schedule and key milestones. (Reviewed by PMO to ensure all aspects included)</td>
<td></td>
<td></td>
<td>Budget and Planning. Agreement with design of solution and deployment.</td>
<td></td>
</tr>
<tr>
<td>Business Case Revised for scope changes or alternatives</td>
<td>Project clearly and fully defined?</td>
<td>Yes</td>
<td>Yes</td>
<td>Approved to Proceed or Declined.</td>
</tr>
<tr>
<td>Appeal</td>
<td>Abandon</td>
<td>No</td>
<td>No</td>
<td>Declined or Deferred.</td>
</tr>
<tr>
<td>Abandon</td>
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<tr>
<td>Approval</td>
<td></td>
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<tr>
<td>VP of Business Unit Assesses and determines Approval, Rejection or Alternative</td>
<td></td>
<td></td>
<td>Budget and Planning Agreement with design of solution and deployment.</td>
<td></td>
</tr>
<tr>
<td>Declined or Deferred</td>
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<tr>
<td>Approval</td>
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<tr>
<td>Do the project total costs exceed sponsoring business unit authority or require incremental services from supporting groups such as IT?</td>
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<tr>
<td>Approval level exceeds BU or Project Contingency</td>
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<tr>
<td>Approval level within BU or Existing Project/Contingency</td>
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<tr>
<td>END1: Activities Halted and Documents filed. For future consideration</td>
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<tr>
<td>END2: PM assigned and detailed planning and implementation process begins.</td>
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<td>See Page 3 Project Execution Workflow</td>
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<tr>
<td>END3:</td>
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</tbody>
</table>

**PLANNING PROCESS**

START OF DETAILED PLANNING PROCESS

See Page 3 Project Execution Workflow

**Key evaluation criteria:**
- Alignment with University Strategic Intent
- Priority and feasibility, given existing portfolio of projects, activities and events throughout MSU.
- Agreement on accuracy and probability of Cost/Benefit proposal
- Understanding of key Risks and Mitigation Plans
- Agreement with design of solution and deployment plans.
PROJECT MANAGEMENT OFFICE – Project Life Cycle (See Phases Below)

**Project Management Deliverables**

- **Plan**
  - Project Initiation Process Completed
  - Project Charter Developed from Additional Interviews and Project Definition Document
  - Project Plan Developed Tasks Schedule Resources

- **Specify**
  - Cost Schedule Developed
  - Project Team Training
  - Business Process Workflows Developed and Documented
  - Data Flow Diagrams Developed
  - System Design Team Reviews

- **Design**
  - System Purchase and Acquisition
  - Data Center Needs Reviewed and Remediated, if Necessary
  - System Coding and Implementation for DEV, TEST and PROD

- **Develop**
  - Unit Testing
  - Load Testing
  - Integration Testing
  - Dry Runs/Document Corrections

- **Test**
  - Help Desk Set Up Hours of Operation Staffing Expertise Error Reporting
  - Systems Monitoring and Backups Scheduled
  - Business Continuity and Disaster Recovery Plans Updated

- **Release**
  - Validation Summary Report (Includes Traceability Matrix)
  - Change Control for Release
  - Validation Summary Report

- **Go Live**
  - Post Release Items
    - Periodic System Review
    - Periodic Risk Assessment
    - CAPAs
    - Ongoing Training
    - Change Control
    - System Monitoring
    - Operating Procedure Monitoring

- **Closure**
  - Retirement Plans Developed for any systems being replaced by this implementation
  - Project Closure and Lessons Learned
  - Retirement Plans if Necessary
  - Change Controls
  - Execution of Retirement Plans

**Quality Management Deliverables**

- **Risk Assessment And Compliance Requirements Definition**
  - Risk Assessment
  - Validation Plan and any necessary Vendor Audits (VP includes Test Plan/Protocol)

- **User Requirements**
  - User Requirements
  - Functional Requirements Specification
  - Risk Assessment

- **Design Qualification**
  - Technical Architecture Design and Configuration Documents
  - Installation Documents (Test and Prod)
  - Functional Testing Documents (Test Only)
  - Performance and Process Testing Documents (Test Only, Exercise SOPs)

- **Verify Qualification Reports**
  - Test Protocol Execution (In TEST and PROD environments or as specified in the development phase)
  - Variance Reporting and Resolution
  - Test/Qualification Summary Reports

- **System Administration Manual**
  - System and Business Operating Procedures
  - System Use Business Owner/Administrator Training and Records

- **Post Release Items**
  - Periodic System Review
  - Periodic Risk Assessment
  - CAPAs
  - Ongoing Training
  - Change Control
  - System Monitoring
  - Operating Procedure Monitoring

- **Dry Runs/Document Corrections**
  - Help Desk Set Up
  - Hours of Operation Staffing Expertise Error Reporting

- **Business Continuity and Disaster Recovery Plans**
  - Updated