

HOW DO I REVIEW A PROJECT IDEA AT PRE-P0?

OVERVIEW

Ideation is a way of gathering, screening, and managing project ideas at GP. It is the process of forming, collecting, clarifying, screening, and connecting business strategies and objectives to project ideas. Ideation enables the idea for consideration as a potential project (opportunity). The goals of Ideation are to:

- Increase acceptance rate of beneficial ideas
- Streamline the review process
- Establish a clear connection of project ideas to business priorities
- Waste less time on projects that “don’t go”
- Respond to market needs more quickly
- Realize savings faster

The main processes within Ideation are:

1. Create the project idea
2. Submit the project idea for Pre-P0 review
3. **Pre-P0 review of the project idea**
4. Ranking of the project idea

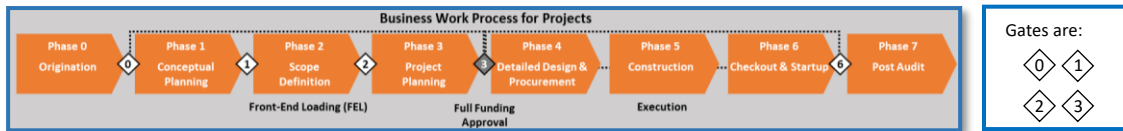
ECOSYS STEPS

To review a project idea at Pre-P0, the following steps are performed in EcoSys:

1. **View** the project idea.
2. **Select** the appropriate action (i.e. accept, rework, or reject) with comments.

QUICK REFERENCE TERMINOLOGY

- *Accelerator*: A motivating reason to accelerate a project in the Business Process for Projects (BPP) work process.
- *Approval Workflow*: The distribution path for opportunity/project information (from Pre-P0 to Budget Approval).
- *Deliverable*: A unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a phase. Deliverables define the overall scope and execution plan for the program or project. A Deliverable could be a service, report or product, for example the P&ID's, a mechanical contracting package or an Environmental analysis.
- *Gate*: The review period between phases of the Business Process for Projects work process.



- *Ideation (Pre-Phase 0)*: The time period before Phase 0 (Origination), that covers the process of forming, collecting, clarifying, screening and connecting project ideas/opportunities to business strategies and objectives which enables the idea/opportunity for consideration as a potential project. Ideas can come from anyone within a business or organization.
- *Opportunity*: A reviewed project idea (a project idea becomes an opportunity when it is reviewed at Pre-P0).
- *Opportunity Activation Approval Workflow*: This is performed by the Project Owner who performs Pre – Phase 0 screening and an advances an opportunity to Phase 0 – Origination.
- *Originator*: any GP employee with a project idea.
- *Phase*: A time period within the Business Process for Projects work process, the process that governs how projects are handled across GP, which now includes eight (8) phases from: Pre-P0 (Ideation) through P7 (Post Audit).
- *Phase Gate*: A Phase-Gate is a Waterfall type process that can be used interchangeably with Stage-Gate. It describes a process that has a distinct scope of work performed in a Phase separated by decision points (Gates). GP has typically used the term Phase to describe the work between the Gates, while EcoSys will generally use the word Stage. These words describe the same thing and can be used interchangeably.
- *Project Idea*: An idea for a potential project to solve a potential problem or sustain a competitive advantage.
- *Project Owner*: Typically an Asset Owner, platform leader, etc. that reviews the idea.
- *Validation Count*: The number of deliverables or items open to be completed before an opportunity or project can be submitted to review for advancement or approval. On completing/updating the associated deliverables, the Failure Count is updated. When the Failure Count becomes zero, the project can be submitted for review.
- *Visual Workflow*: A flowchart in EcoSys that shows the current status of the opportunity/project.

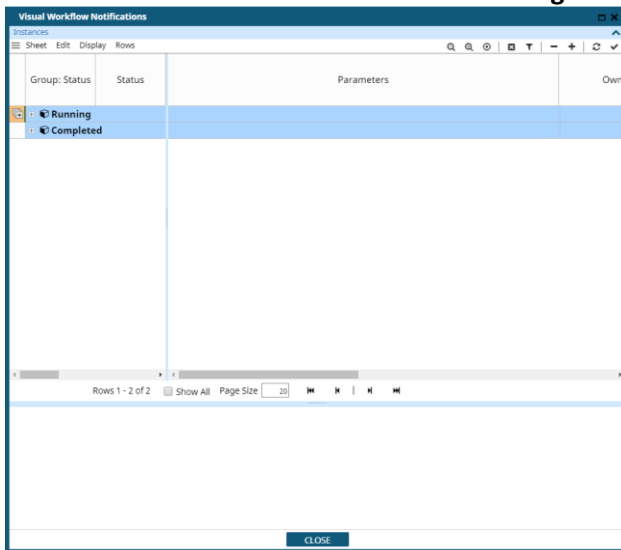
STEP-BY-STEP

1 – VIEW THE PROJECT IDEA

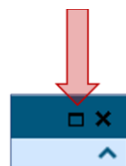
- a. Click the 'Visual Workflow Notifications' icon in the upper right-hand corner of EcoSys.



The 'Visual Workflow Notifications' dialog box appears.



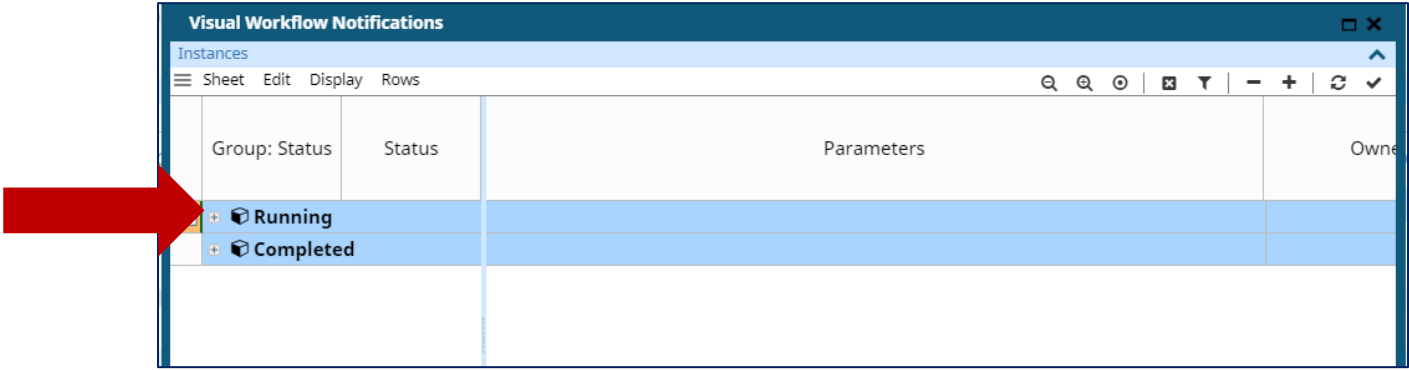
Tip: You may need to resize the 'Visual Workflow Notifications' dialog box to be able to view the details. Click on the 'maximize' box on the right-hand corner of the 'Visual Workflow Notifications' dialog box.



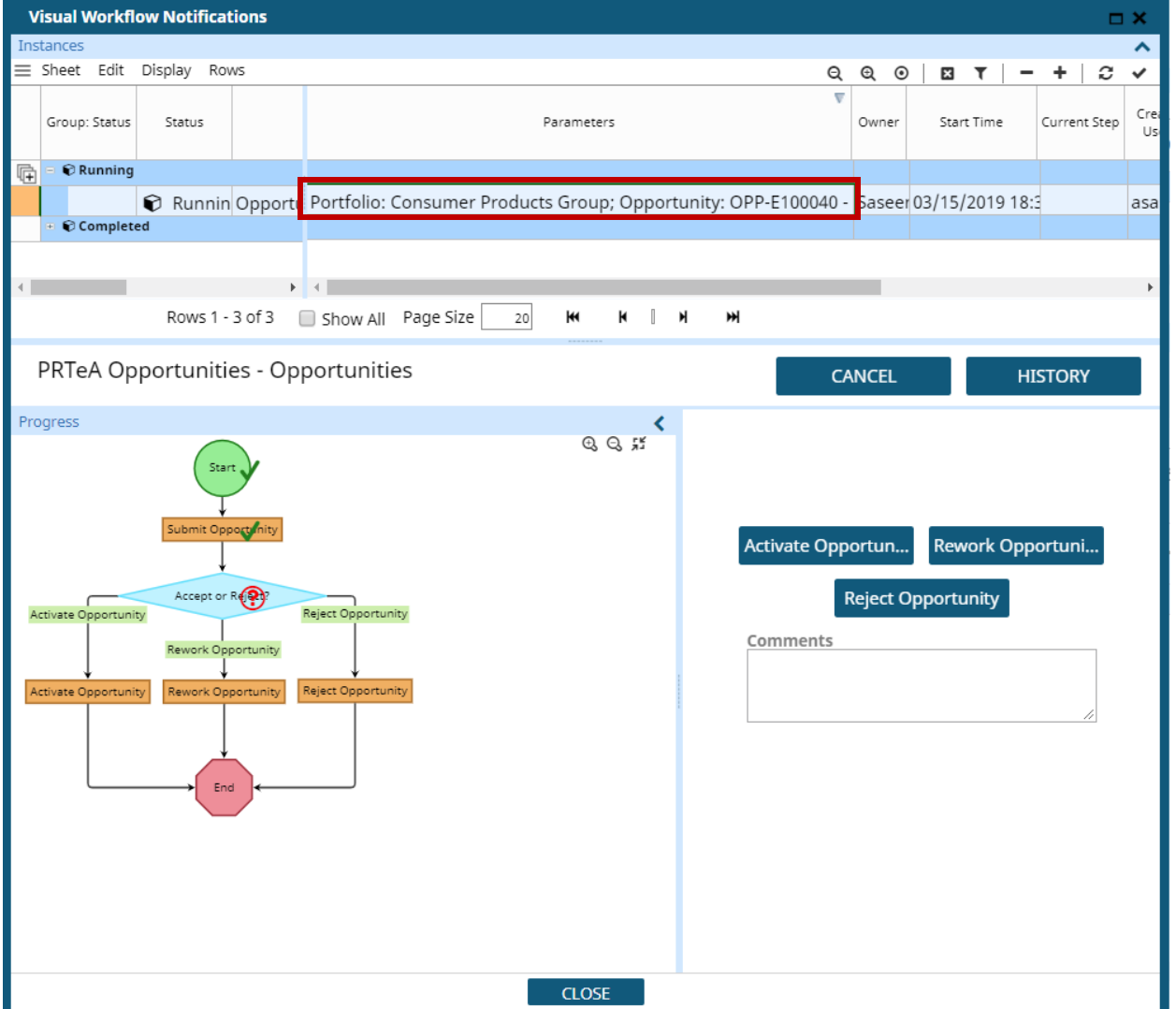
- b. Under the 'Group: Status' column, expand the 'Running' list by clicking on the '+' sign to the left of 'Running'.

PROJECTS

OPPORTUNITY SETUP



c. Under the 'Parameters' column, click on the project idea waiting for review. This displays the Visual Workflow flowchart of the project idea.



Tip: You may need to drag the blue bars and/or click the zoom icon to adjust the size of the 'flowchart.'

The screenshot displays the 'Visual Workflow Notifications' window. At the top, there is a table with columns for Group, Status, Status, Parameters, Owner, Start Time, Current Step, and End Time. Below the table, a flowchart titled 'PRTeA Opportunities' is visible. The flowchart starts with a 'Submit Opportunity' step, leading to a decision diamond 'Accept or Rework?'. From this diamond, three paths emerge: 'Activate Opportunity', 'Rework Opportunity', and 'Reject Opportunity'. Each path leads to a corresponding button: 'Activate Opportun...', 'Rework Opportun...', and 'Reject Opportunity'. A 'Comments' text box is located below these buttons. A 'CLOSE' button is at the bottom right. Red arrows indicate zooming in on the flowchart and dragging the blue bars to adjust its size.

2 – SELECT THE APPROPRIATE ACTION

- a. (Optional) Enter any Comments.
- b. Select one (1) of the following three (3) actions:
 - Click the **'Accept Opportunity'** button to convert the project idea into an opportunity and move it to the stage gate process.
 - Click the **'Rework Opportunity'** button to request that the project idea be changed, fixed, updated, etc. and re-submitted when ready.
 - Click the **'Reject Opportunity'** button to reject the project idea.

The screenshot displays the 'Visual Workflow Notifications' application. At the top, there is a table with columns: Group, Status, Status, Parameters, Owner, Start Time, Current Step, and Cre Us. The table shows two rows: one with status 'Running' and another with status 'Completed'. Below the table, there are navigation controls including 'Rows 1 - 3 of 3', 'Show All', and 'Page Size 20'. The main area is titled 'PRTea Opportunities - Opportunities' and contains a 'Progress' section with a flowchart. The flowchart starts with a 'Start' node, followed by 'Submit Opportunity', then a decision diamond 'Accept or Rework Opportunity'. From this diamond, three paths emerge: 'Activate Opportunity', 'Rework Opportunity', and 'Reject Opportunity'. Each path leads to a corresponding action box, which then loops back to the 'Accept or Rework Opportunity' decision. The flowchart ends at an 'End' node. To the right of the flowchart is a form with buttons for 'Activate Opportun...', 'Rework Opportuni...', and 'Reject Opportunity', along with a 'Comments' text area. A red box highlights this form area. At the bottom of the interface is a 'CLOSE' button.

c. Click 

Note that the project idea now appears under the 'Group Status' 'Completed' and the 'Visual Workflow' flowchart has been updated.

PROJECTS

OPPORTUNITY SETUP

The screenshot displays the 'Visual Workflow Notifications' interface. At the top, there is a table with columns for Group, Status, Parameters, Owner, Start Time, Current Step, and Created By. A red arrow points to the 'Completed' status in the table. Below the table, the workflow progress is visualized as a flowchart. A second red arrow points to the flowchart. The flowchart starts with a 'Start' node, followed by 'Submit Opportunity', a decision diamond 'Accept or Reject?', and three paths: 'Activate Opportunity', 'Rework Opportunity', and 'Reject Opportunity'. Each path leads to a corresponding task box, which then leads to an 'End' node. A text box on the right states 'This workflow has been completed.' and a 'CLOSE' button is at the bottom.

Group	Status	Parameters	Owner	Start Time	Current Step	Created By
	Running					
	Completed	Portfolio: Consumer Products Group; Opportunity: PRJ-E100027 - P Saseer	P Saseer	03/15/2019 18:3		

Rows 1 - 9 of 9 | Show All | Page Size 20

PRTeA Opportunities - Opportunities | HISTORY

Progress

This workflow has been completed.

CLOSE

CHEAT SHEET

Reviewing a project idea at Pre-PO in EcoSys involves the following steps:

Actions	No	Step-By-Step Instructions
1 – View the project idea	a	Click the 'Visual Workflow Notifications' icon in the upper right-hand corner of EcoSys. The 'Visual Workflow Notifications' dialog box appears.
	b	Under the 'Group Status' column, expand the 'Running' list by clicking on the '+' sign to the left of 'Running' .
	c	Under the 'Parameters' column, click on the project idea waiting for review. This displays the flowchart of the project idea.
2 – Select the appropriate action	a	(Optional) Enter any 'Comments' .
	b	Select one of the following actions: <ul style="list-style-type: none"> – Click the 'Accept Opportunity' button to convert the project idea into an opportunity and move it to the stage gate process. – Click the 'Rework Opportunity' button to request that the project idea be changed, fixed, updated, etc. and re-submitted when ready. – Click the 'Reject Opportunity' button to reject the project idea.
	c	Click 