

## HOW DO I REVIEW AN OPPORTUNITY AT P0?

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### OVERVIEW

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Gate reviews will still follow the Business Process for Projects (BPP), with gates P0-P3 serving as review check points. Gate reviews will be performed by Gatekeeper(s) and other key personnel that will review the deliverables. The process of Gatekeeping is covered in supplementary training material and is only summarized here.

The goals of gate review are to:

- Streamline the review process.
- Better facilitate adherence to the work process, by using a consistent workflow.
- Increase the quality of project gate deliverables.

The main processes within Origination are:

1. Prepare the opportunity for P0 Gate review
2. Submit the opportunity for P0 Gate review
3. **Review the opportunity at P0 (advance to the next phase or rework)**

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### ECOSYS STEPS

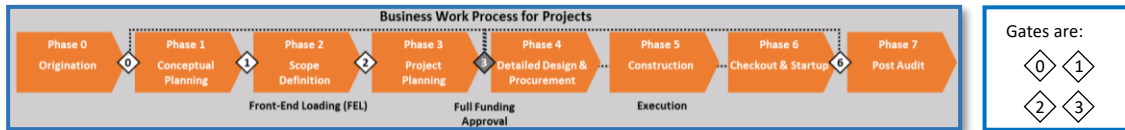
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To review an opportunity at P0, the following steps are performed in EcoSys:

1. **View** the opportunity.
2. **Select** the appropriate action (i.e. pass, rework, or reject) with comments.

**QUICK REFERENCE TERMINOLOGY**

- *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.



- *Gatekeeper:* Is a trained qualified SME in the Business Process for Projects work process that oversees the gate review process and checks the quality of deliverables.
- *Opportunity:* A reviewed project idea (a project idea becomes an opportunity when it is reviewed at Pre-P0).
- *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 0:* P0 is the Origination Phase of a Project Opportunity. At P0 phase a project owner defines the Opportunity or problem, clarifies the objectives, and establishes the OBC. Key outcome is to Identify and articulate the potential value and/or what is at stake. The best strategic fit and value opportunities advance to become Projects in Phase 1 (P1).
- *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 Owner:* Typically an Asset Owner, platform leader, etc. that reviews the idea.
- *Project Stage Gate Workflow:* This is performed by the Gatekeeper who advances an opportunity through P0 and/or a project through P1 to P7.
- *Visual Workflow:* A flowchart in EcoSys that shows the current status of the opportunity/project.

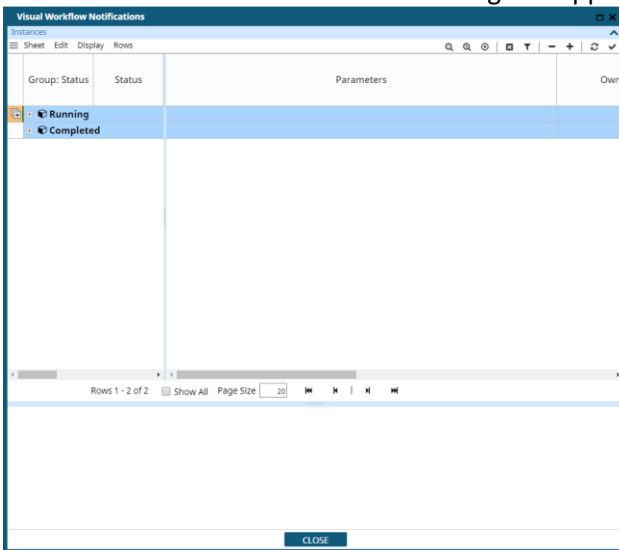
## STEP-BY-STEP

## 1 – VIEW THE OPPORTUNITY

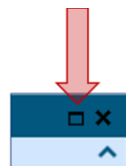
- a. Click the 'Visual Workflow Notifications' icon in the upper right-hand corner of EcoSys.



The 'Visual Workflow Notifications' dialog box appears:



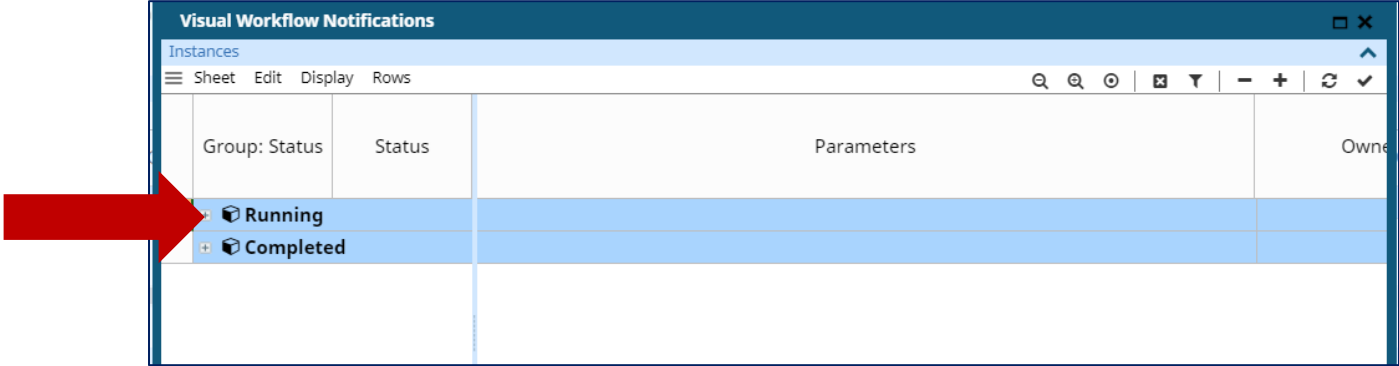
**Tip:** You may need to resize the 'Visual Workflow Notifications' dialog box to be able to view the details. Click on the 'maximize' box on the right-hand corner of the 'Visual Workflow Notifications' dialog box.



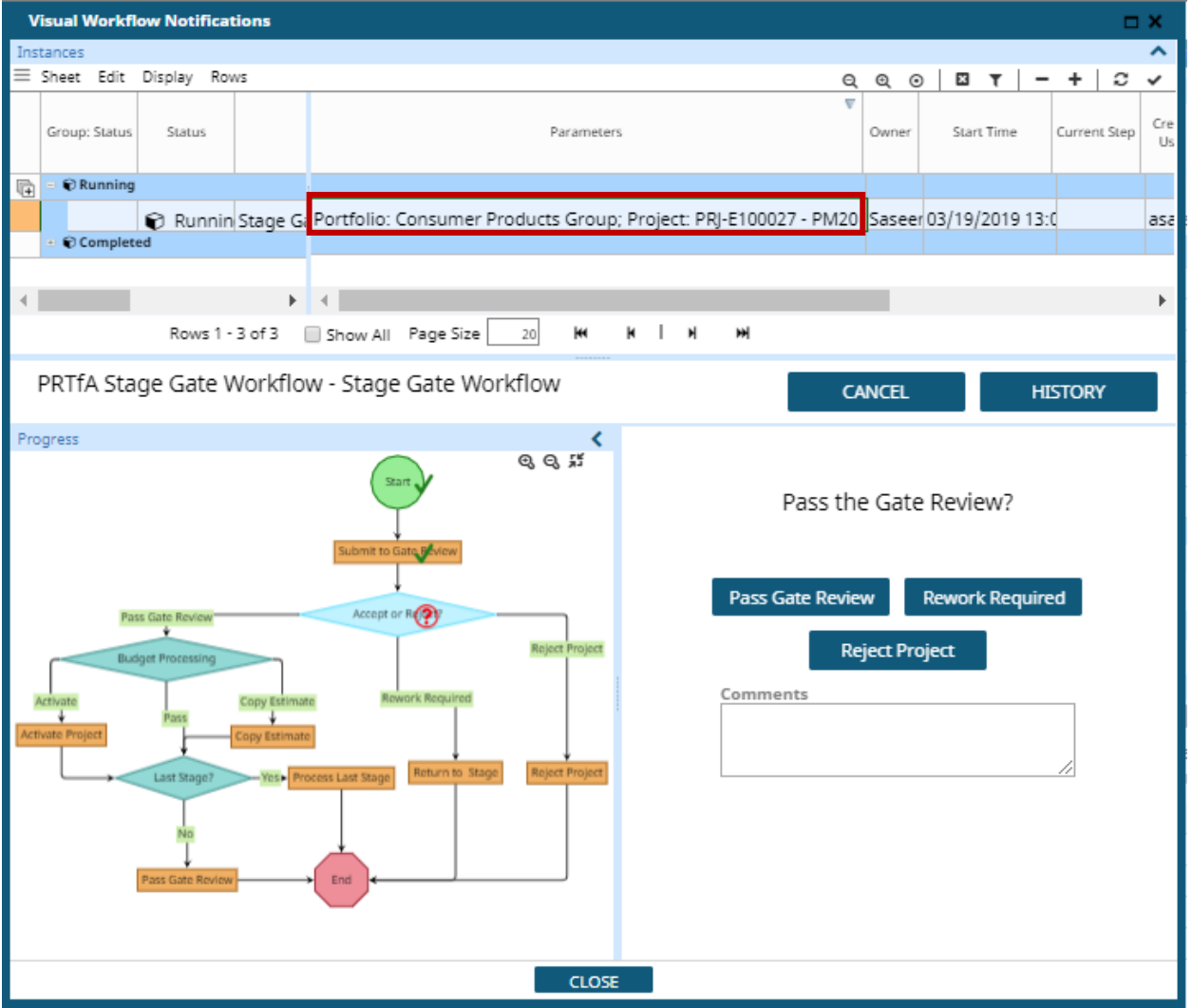
- b. Under the 'Group: Status' column, expand the 'Running' list by clicking on the '+' sign to the left of 'Running'.

# PROJECTS

# OPPORTUNITY STAGE GATES



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



**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 Reject?'. From this diamond, three paths emerge: 'Activate Opportunity', 'Rework Opportunity', and 'Reject Opportunity'. Each path leads to a corresponding action button. A large red arrow points to the search icon above the flowchart, and another red arrow points to the zoom icon. A vertical red double-headed arrow indicates the height of the flowchart area.

## 2 – SELECT THE APPROPRIATE ACTION

- a. (Optional) Enter any 'Comments'.
- b. Select one of the following actions:
  - Click the **'Pass Gate Review'** button to accept or pass the stage gate.
  - Click the **'Rework Required'** button to request that the project be changed, fixed, updated, etc. and re-submitted when ready.
  - Click the **'Reject Project'** button to reject the opportunity. This removes the project/opportunity from the system permanently and it can no longer be recovered.

# PROJECTS

# OPPORTUNITY STAGE GATES

Visual Workflow Notifications

Group	Status	Status	Parameters	Owner	Start Time	Current Step	Cre Us
Running	Running	Stage Gate	Portfolio: Consumer Products Group; Project: PRJ-E100027 - PM20	Saseer	03/19/2019 13:00		ase
Completed	Completed	Stage Gate	Portfolio: Consumer Products Group; Project: PRJ-E100027 - PM20	Saseer	03/19/2019 13:00		ase

PRTfA Stage Gate Workflow - Stage Gate Workflow

Progress

Pass the Gate Review?

Pass Gate Review Rework Required

Reject Project

Comments

c. Click

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

Visual Workflow Notifications

Group	Status	Status	Parameters	Owner	Start Time	Current Step	Cre Us
Completed	Completed	Stage Gate	Portfolio: Consumer Products Group; Project: PRJ-E100027 - PM20 Wire Skewing Optimiz	Saseend	03/19/2019 13:04:37		
Completed	Completed	Opportunity	Portfolio: Consumer Products Group; Opportunity: PRJ-E100027 - PM20 Wire Skewing Op	Saseend	03/15/2019 18:39:06		

PRTfA Stage Gate Workflow - Stage Gate Workflow

Progress

This workflow has been completed.

## CHEAT SHEET

Reviewing an opportunity at PO in EcoSys involves the following steps:

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