

HOW DO I REVIEW A PROJECT AT P1?

OVERVIEW

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 P1-P3 project stage gates are:

1. Prepare the project for P1-P3 Gate review
2. Submit the project for P1-P3 Gate review
3. **Review the project at P1-P3 (advance to the next phase or rework)**
4. Check the status of the project

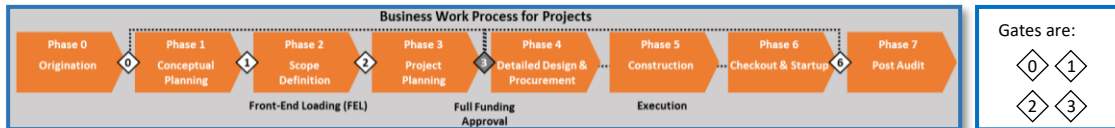
ECOSYS STEPS

To review a project at P1, the following steps are performed in EcoSys:

1. **View** the project.
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.
- **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:** A collaborative enterprise designed to achieve a particular objective. It has a distinct starting and ending date. In EcoSys, an idea is not considered a project until it reaches Phase 1
- **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.

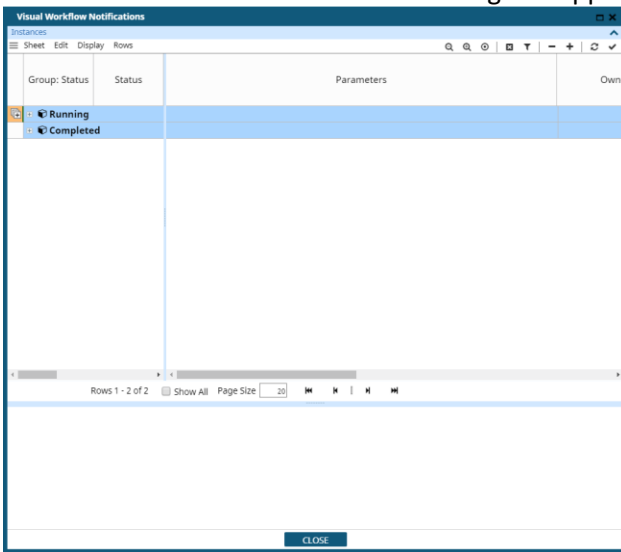
STEP-BY-STEP

1 – VIEW THE PROJECT

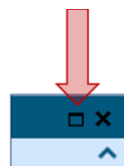
- a. Click the ‘Visual Workflow Notifications’ icon in the upper right-hand corner of EcoSys.



The ‘Visual Workflow Notifications’ dialog box appears:



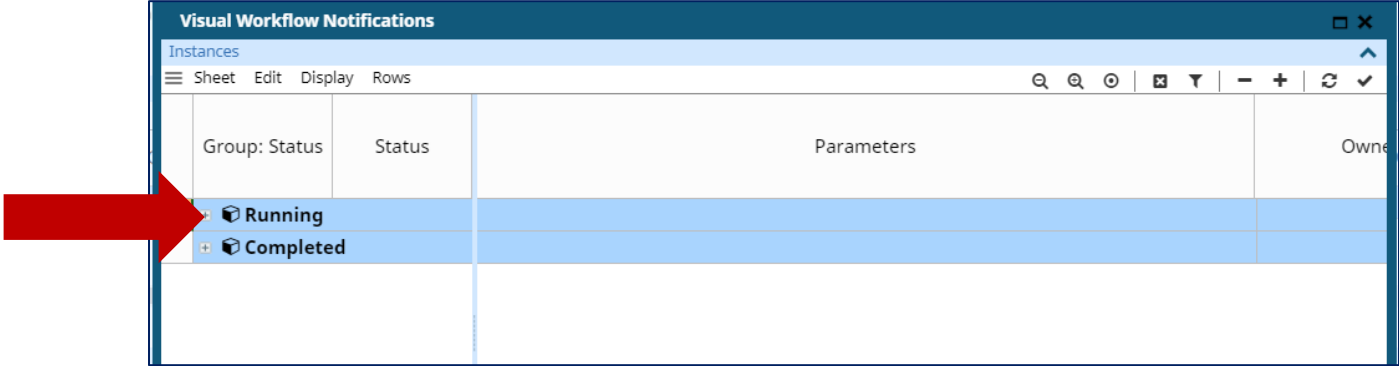
Tip: You may need to resize the ‘Visual Workflow Notifications’ dialog box to be able to view the details. Click on the ‘maximize’ box on the right-hand corner of the ‘Visual Workflow Notifications’ dialog box.



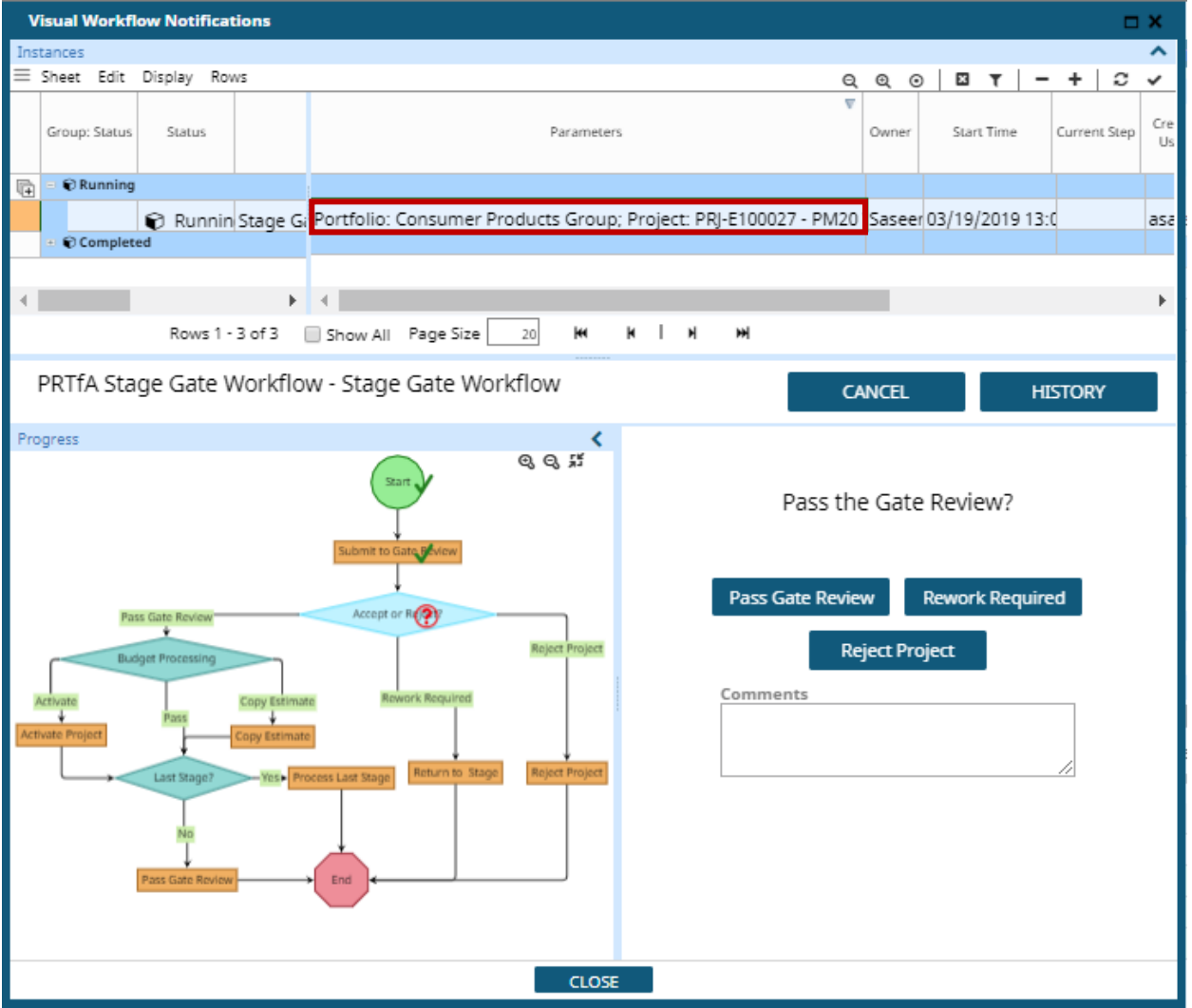
- b. Under the ‘Group: Status’ column, expand the ‘Running’ list by clicking on the ‘+’ sign to the left of ‘Running’.

PROJECTS

PROJECT STAGE GATES



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



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 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 flowchart area, and another red arrow points to the 'Accept or Reject?' decision diamond. The interface also includes a 'Comments' text box and buttons for 'CANCEL', 'HISTORY', and 'CLOSE'.

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 project. Please email Cornerstone@GAPAC.com if you accidentally rejected or cancelled an opportunity or project.

PROJECTS

PROJECT STAGE GATES

The screenshot shows the 'Visual Workflow Notifications' window. At the top, there is a table with columns: Group, Status, Status, Parameters, Owner, Start Time, Current Step, and Cre Us. The first row is highlighted in blue and shows a 'Running' project: 'Runnin Stage G' with parameters 'Portfolio: Consumer Products Group; Project: PRJ-E100027 - PM20', owner 'Saseer', and start time '03/19/2019 13:00'. Below the table is a flowchart titled 'PRTfA Stage Gate Workflow - Stage Gate Workflow'. The flowchart starts with a 'Start' node, followed by 'Submit to Gate Review', then a decision 'Accept or Reject?'. From this decision, paths lead to 'Pass Gate Review', 'Budget Processing', 'Copy Estimate', 'Rework Required', and 'Reject Project'. The 'Pass Gate Review' path leads to 'Activate Project', then 'Last Stage?'. If 'Yes', it goes to 'Process Last Stage', then 'Return to Stage', and back to 'Accept or Reject?'. If 'No', it goes to 'Pass Gate Review' and then 'End'. A dialog box titled 'Pass the Gate Review?' is overlaid on the right, containing buttons for 'Pass Gate Review', 'Rework Required', and 'Reject Project', along with a 'Comments' text area. A red box highlights these buttons.

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

The screenshot shows the 'Visual Workflow Notifications' window after the project has been completed. The table now shows two rows under the 'Completed' status. The first row is highlighted in blue and shows 'Completed Stage Gate' with parameters 'Portfolio: Consumer Products Group; Project: PRJ-E100027 - PM20 Wire Skewing Optimiz', owner 'Saseer', and start time '03/19/2019 13:04:37'. A red arrow points to this row. The flowchart below is updated, showing green checkmarks on several nodes: 'Submit to Gate Review', 'Accept or Reject?', 'Pass Gate Review', 'Activate Project', 'Last Stage?', 'Process Last Stage', 'Return to Stage', and 'End'. A red arrow points to the 'Last Stage?' decision node. The dialog box on the right now displays the text 'This workflow has been completed.' and the 'HISTORY' button is visible.

CHEAT SHEET

Reviewing a project at P1 in EcoSys involves the following steps:

Actions	No	Step-By-Step Instructions
1 – View the project.	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 waiting for review. This displays the Visual Workflow of the project.
2 – Select the appropriate action.	a	(Optional) Enter any 'Comments' .
	b	Select one of the following actions: 1. Click the 'Pass Gate Review' button to accept or pass the stage gate. 2. Click the 'Rework Required' button to request that the project be changed, fixed, updated, etc. and re-submitted when ready. 3. Click the 'Reject Project' button to reject the project.
	c	Click 