

HOW DO I CHECK THE STATUS OF A PROJECT?

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**

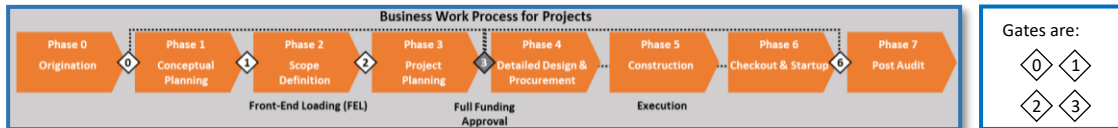
ECOSYS STEPS

There are two (2) ways to check the status of a project in EcoSys:

1. Using the **Gate Register**.
2. Using the **Visual Workflow**.

QUICK REFERENCE TERMINOLOGY

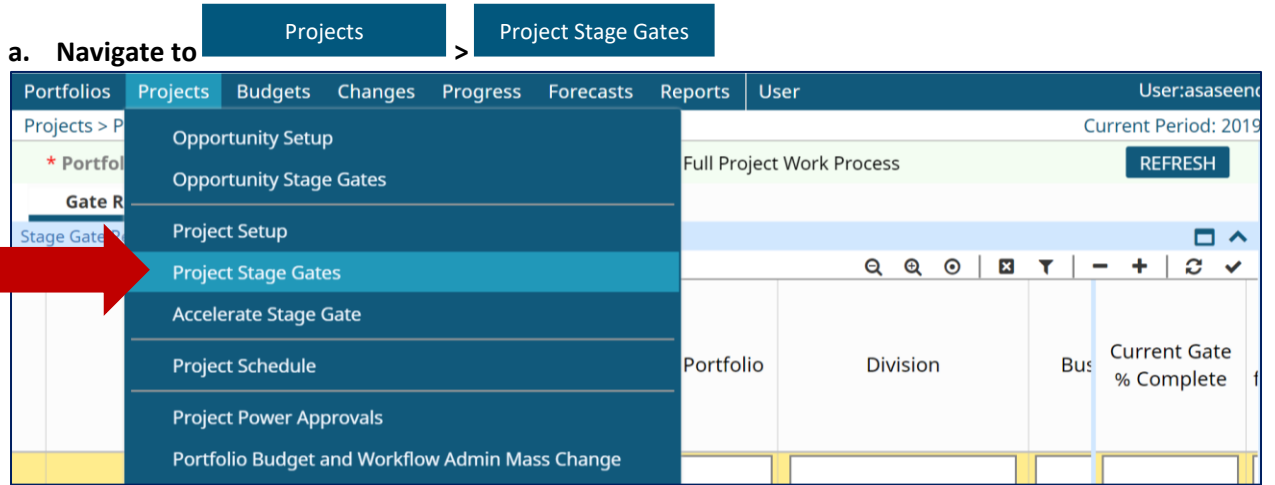
- *Approval Workflow:* The distribution path for opportunity/project information (from Pre-P0 to Budget Approval).
- *Deliverable:* A unique and verifiable product, result, or capability to perform a service that is required to be produced to complete a phase. Deliverables define the overall scope and 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.



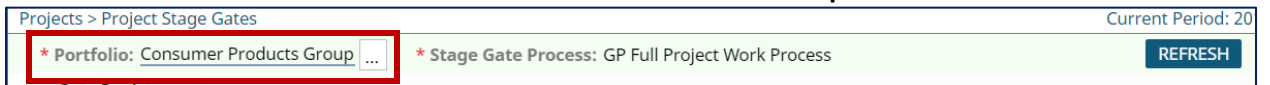
- *Gatekeeper:* Is a trained qualified SME in the Business Process for Projects work process that oversees the gate review process and checks the quality of deliverables.
- *Phase:* A time period within the Business Process for Projects work process, the process that governs how projects are handled 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

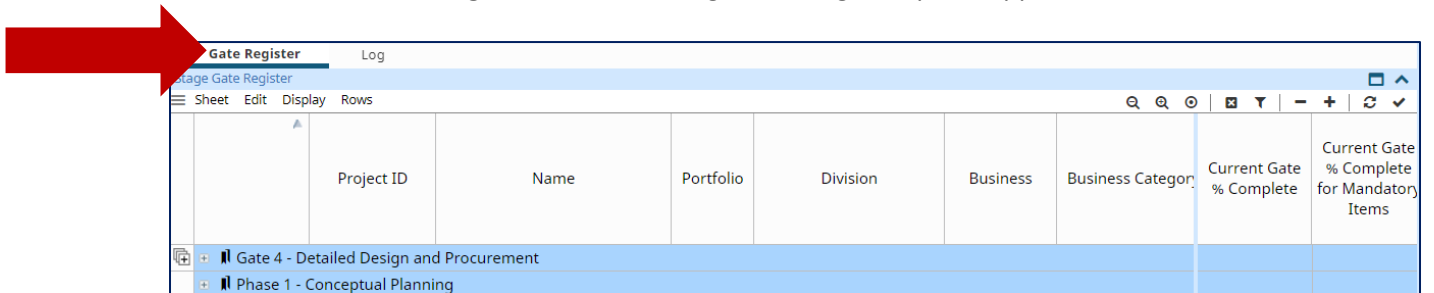
1 – USING THE GATE REGISTER



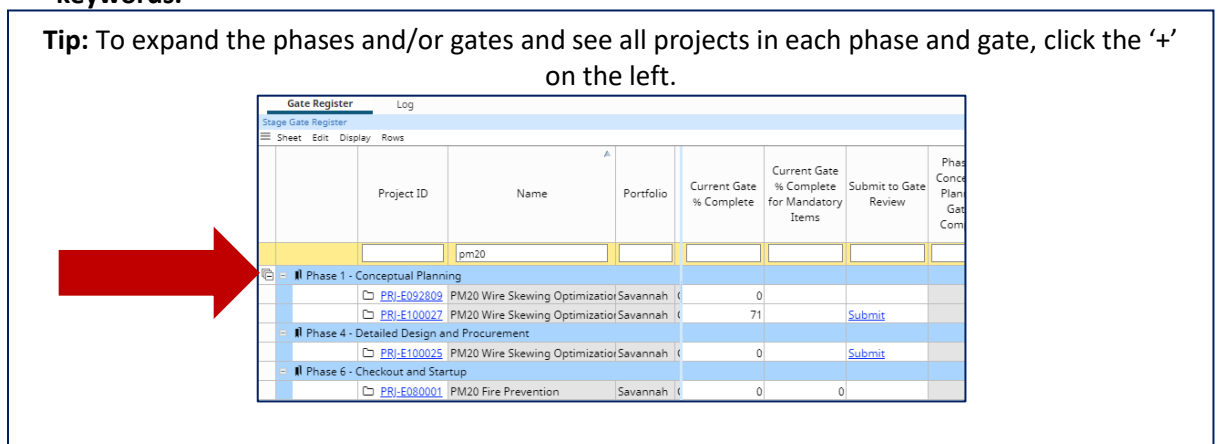
b. Click the next to 'Portfolio' in the Parameter bar to select the portfolio.



c. Click on the 'Gate Register' tab. The 'Stage Gate Register' panel appears.



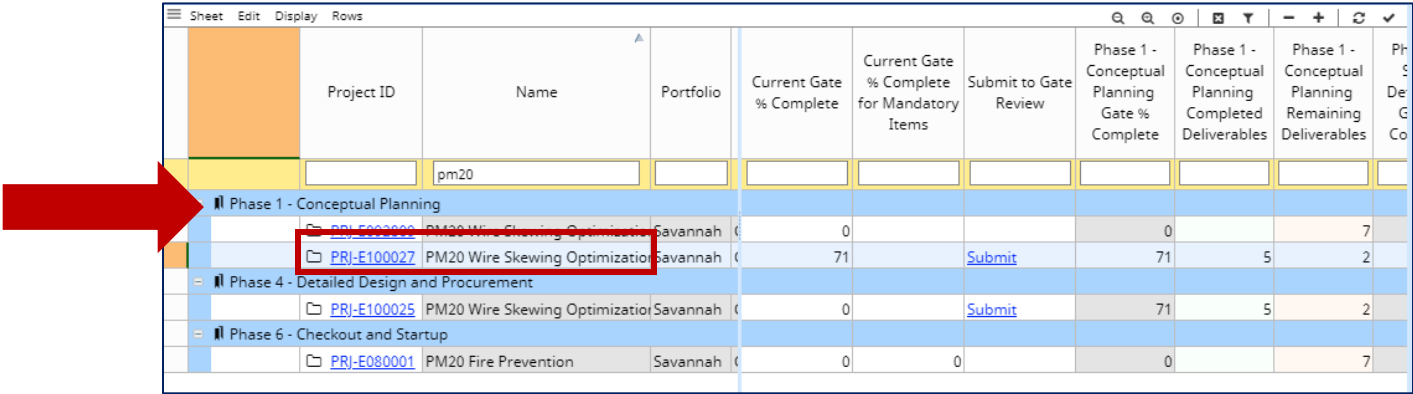
d. Click the 'Filter' icon on the Spreadsheet Toolbar and search for your project using keywords.



PROJECTS

PROJECT STAGE GATES

The Phase or Gate that your project is located under will indicate the current status of the project. The project will show under a Gate once it has been submitted and is being reviewed, but will show under the next Phase once approved.



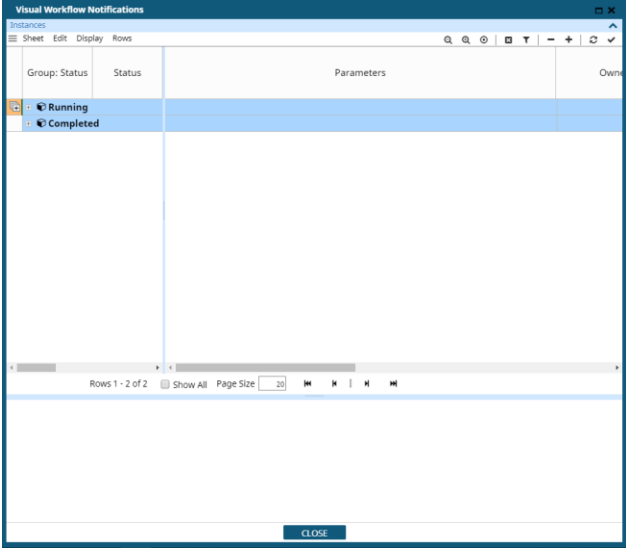
Project ID	Name	Portfolio	Current Gate % Complete	Current Gate % Complete for Mandatory Items	Submit to Gate Review	Phase 1 - Conceptual Planning Gate % Complete	Phase 1 - Conceptual Planning Completed Deliverables	Phase 1 - Conceptual Planning Remaining Deliverables	PH S De G Co
pm20									
Phase 1 - Conceptual Planning									
PRJ-E000000	PM20 Wire Skewing Optimization	Savannah	0			0		7	
PRJ-E100027	PM20 Wire Skewing Optimization	Savannah	71		Submit	71	5	2	
Phase 4 - Detailed Design and Procurement									
PRJ-E100025	PM20 Wire Skewing Optimization	Savannah	0		Submit	71	5	2	
Phase 6 - Checkout and Startup									
PRJ-E080001	PM20 Fire Prevention	Savannah	0	0		0		7	

2 – USING THE VISUAL WORKFLOW

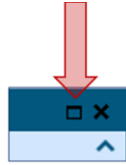
a. Click the 'Visual Workflow Notifications' icon in the upper right-hand corner of EcoSys.



The 'Visual Workflow Notifications' dialog box appears.

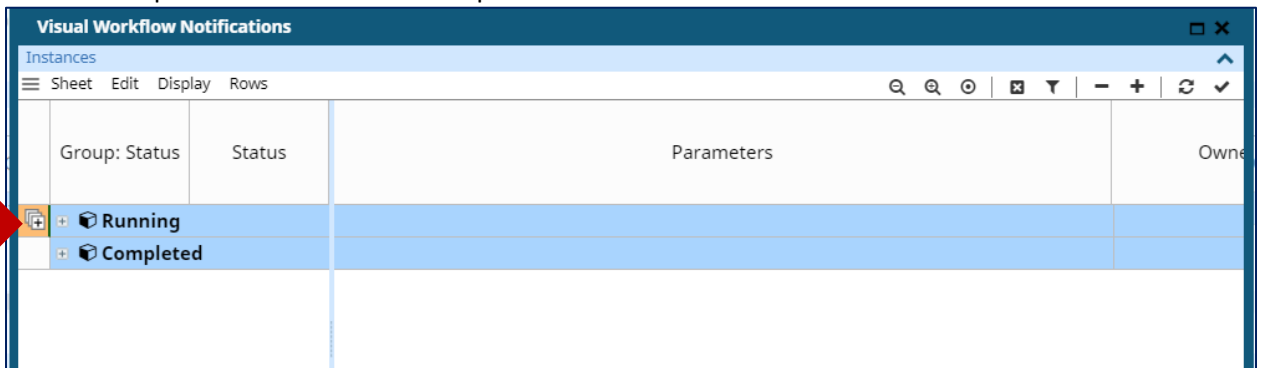


Tip: You may need to resize the **'Visual Workflow Notifications'** dialog box to be able to view the details. Click on the 'maximize' box on the right-hand corner of the **'Visual Workflow Notifications'** dialog box.



b. Expand all the 'Group: Statues' by clicking on the '+' sign to the left.

- Error: Indicates that the desired operation has failed, or the system needs to relay important warnings.
- Running: The opportunities and projects which are in action at the moment.
- Completed: Indicates that the operation has been concluded.



c. Under the 'Parameters' column, click on the project name. This displays the flowchart of the project, where you can see the status of a project.

PROJECTS

PROJECT STAGE GATES

The screenshot displays the 'Visual Workflow Notifications' interface. At the top, a table lists workflow instances. The second row, under the 'Completed' status, is highlighted with a red box and contains the text: 'Portfolio: Consumer Products Group; Project: PRJ-E100027 -'. Below the table, the workflow name 'PRTfA Stage Gate Workflow - Stage Gate Workflow' is shown. The main area features a flowchart titled 'Progress' and a message box stating 'This workflow has been completed.' A red arrow points to the 'Activate Project' step in the flowchart.

Group: Status	Status	Workflow Name	ID	Parameters
Running	Running	Stage Gate Workflow	PRTfA Stage Gate Workflo	Portfolio: Consumer Products Group; Project: PRJ-E100021 -
Completed	Comple	Stage Gate Workflow	PRTfA Stage Gate Workflo	Portfolio: Consumer Products Group; Project: PRJ-E100027 -
Completed	Comple	Opportunities	PRTeA Opportunities	Portfolio: Consumer Products Group; Opportunity: PRJ-E1000

Rows 1 - 11 of 11 | Show All | Page Size 20

PRTfA Stage Gate Workflow - Stage Gate Workflow HISTORY



Progress

This workflow has been completed.

CLOSE

CHEAT SHEET

Checking the status of a project in EcoSys can be done in two (2) ways:

Actions	No	Step-By-Step Instructions
1 – Using the ‘Gate Register’	a	Navigate to 
	b	Click the  next to ‘Portfolio’ in the Parameter bar to select the portfolio.
	c	Click on the ‘Gate Register’ tab. The ‘Stage Gate Register’ panel appears.
	d	Click the ‘Filter’ icon on the Spreadsheet Toolbar and search for your project using keywords. The Phase or Gate that your project is located under will indicate the current status of the project.
2 – Using the ‘Visual Workflow’	a	Click the ‘Visual Workflow Notifications’ icon in the upper right-hand corner of EcoSys. The ‘Visual Workflow Notifications’ dialog box appears.
	b	Expand all the ‘Group: Statues’ by clicking on the ‘+’ sign to the left.
	c	Under the ‘Parameters’ column, click on the project name. This displays the flowchart of the project, where you can see the status of a project.