ProTrac Project Request Procedure

Facilitator Guide

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Contents

Facilitator Checklist

Three Weeks Prior to Training Class	Review the training material and develop a training strategy for the content. Focus on key adult learning principles and perform additional research about the department and system. Create classroom exercise handouts.
Two Weeks Prior to Training Class	Follow up with management to finalize the list of participants. Finish all outstanding exercise handouts. Book the training room and make sure it has the necessary equipment (request if not): • Computer • Projector
One Week Prior to Training Class	Finalize refreshments with food vendor. *Will there be bagels or donuts? Snack baskets for each table?* Gather all materials/supplies needed and make extra copies of the handout sheets.
Day of Training Class	Before the training class begins, set name tents on each table and have a sign-out sheet placed on the back table with a pen. Each table should have pens, a water pitcher, paper cups, and the ProTrac flow handout sheets. Bring the facilitator guide with you and refer to the materials/supply list to ensure you have everything that you need. Make sure the computer and projector are running, and the PowerPoint presentation is working. Test to make sure ProTrac can be accessed from the computer.

Facilitator Information

Purpose

This guide is to prepare and assist the facilitator with the ProTrac project request training.

Content

This guide contains outlines, suggestions, slides and examples intended to help you:

- Facilitate a training class
- Direct participants through classroom exercises
- Effectively present content and examples

Session Objectives

- Understand how to navigate the ProTrac system
- Understand how to properly create a ProTrac project request
- Create consistency amongst all roles in the department when creating project requests

Preparation

At least three weeks should be used to review material and develop a content training strategy. During this time, all handouts and other materials should be developed and the training room should be booked.

Materials/Supplies

- Easel pad
- Dry-erase markers
- PowerPoint presentation
- Pens
- Projector
- Name tents
- Paper cups

- Water pitchers
- Exercise handouts
- Sign-in sheet
- Facilitator guide
- Computer with access to ProTrac via intranet

Time – 2 hours

Prepare for the training class to last for two full hours, starting promptly at 8am. Class dismissal should end before 11am.

Room

The training room will need to be booked for half a workday, and equipped to hold approximately 20 participants.

Participants

This training class will consist of the HIN department staff with experience ranging from 1 to 15 years. This includes analysts, programmers/developers, supervisors, and consultants.

Note: Attendees should already have access to ProTrac, but they may not have used all of its features.

Session Information

Session	Time	Materials Needed
Introduction	**15 minutes**	
Icebreaker/Intro to Class	10 minutes	
System Overview	5 minutes	Computer, PowerPoint
Navigation Pane Buttons	**10 minutes**	Computer, PowerPoint
ProTrac Flow	**10 minutes**	ProTrac flow handout
Project Request Procedure	**1 hour 20 minutes**	Computer, PowerPoint
ProTrac Request Types	10 minutes	Computer, PowerPoint
Exercise 1	20 minutes	Project type handout, easel pad and markers, PowerPoint
Required ProTrac Request Fields	20 minutes	Computer, PowerPoint
Adding Attachments to the ProTrac	5 minutes	Computer, PowerPoint
Assigning a Project	5 minutes	Computer, PowerPoint
Creating a Task	5 minutes	Computer, PowerPoint
Exercise 2	15 minutes	System enhancement handout
Closing	**5 minutes**	

Introduction

Introduction

Briefly introduce yourself and the purpose of the workshop. Give a general overview of what will be discussed in each session so that participants know the agenda beforehand. This will allow them to be thinking about their experience with the system.

Discussion - Open the floor to allow attendees to tell you what they already know about the system and how they use it in their current roles.

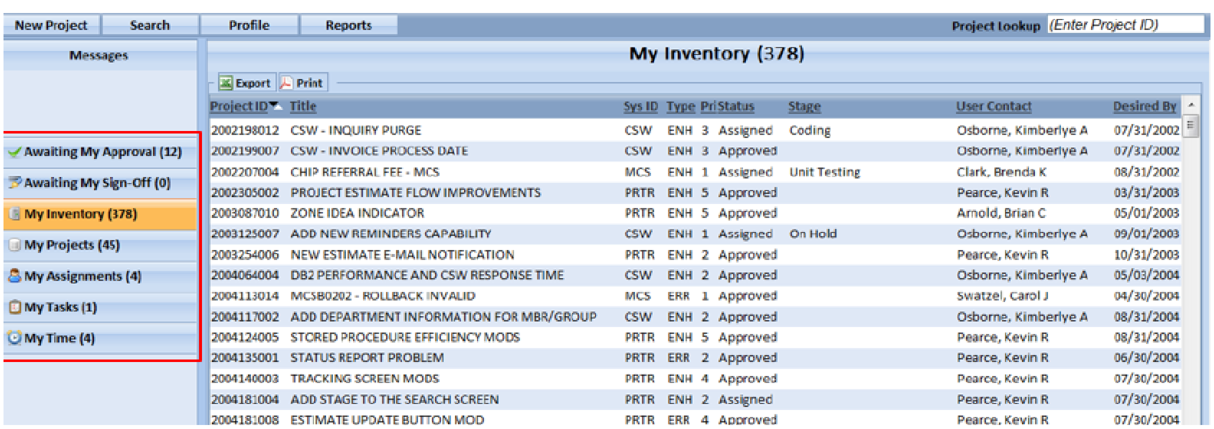
Suggestion: Discuss any concerns/evaluations that may have prompted the need for training, if any.

System Overview

ProTrac is our Enterprise's project request system that allows users to follow the lifecycle of a project. Through this system, projects are created, approved, tracked, signed-off, implemented, and completed.

Navigation Pane Buttons

The buttons on the left navigation pane allow users to access different lists of projects after clicking each one. Give a quick overview of each function below as attendees may not be familiar with them all.



Slide 4

Awaiting My Approval

This button directs users to all submitted projects awaiting their approval. After a project from the grid is selected, users are given the ability to approve or disapprove.

Awaiting My Sign-Off

This button directs users to all projects awaiting sign-off. Sign-off is required before a software change can be implemented, and after a project from the grid is selected users are given the ability to grant or approve.

My Inventory

This button directs users to a list of projects that have been submitted, user approved, approved, and assigned. After a project from the grid is selected, the user is taken to the View Project screen.

Note: Only supervisors have this functionality.

My Projects

This button directs users to all projects they are listed as the contact for. This list includes projects that have been submitted, user approved, approved, and assigned. After a project from the grid is selected, the user is taken to the View Project Screen.

My Assignments

This button directs users to active projects that have been assigned to them. After a project from the grid is selected, the user is taken to the View Project screen.

My Tasks

This button directs users to open tasks that they have created or that have been assigned to them.

My Time

This button directs users to a list of active projects that have been assigned to them. After a project from the grid is selected, the user is taken to the Time Entry screen to enter time spent on each project.

ProTrac Flow

Each ProTrac request will follow a specific flow/procedure from the request to the completion of the project.

Follow along with the PowerPoint presentation to discuss the specifics of each step. The flow is as follows:

Suggestion: Have attendees refer to the ProTrac flow handout as you discuss each step. This allows them to physically see the request flow and take notes, if needed.

1. **Submit a new request**
   Requests can be submitted by the LOBs, internal staff from any department, analysts, or supervisors

2. **Approve or deny the request**
   Requests are approved or denied by the programmer supervisor

3. **Assign an analyst**
   Analysts are assigned upon notice of impacted systems

4. **Complete project requirements/documentation to attach to the ProTrac**
   Project requirements are to be completed by the programmer and/or analyst

5. **Programmer codes/develops**

6. **Programmer tests**

7. **Analyst tests**

8. **Sign-off is requested**
   Sign-off is granted or denied by the project supervisor

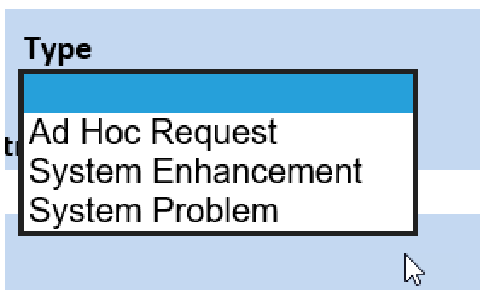
9. **Project is moved to implementation**

Project Request Procedure

This session will discuss the proper way to create a project request. A new project is created from the New Project screen. Access this by clicking the "New Project" button at the top left of the screen.

Project Request Types

When creating a ProTrac project request, a type must be selected. There are three different types of project requests: System Enhancement, System Problem, Ad Hoc.



Slide 8

1. System Enhancement
   This project type includes requests to change the system functionality (GUI screen, where a user is directed, etc.) and the discontinuation of a process.

2. System Problem
   This project type includes requests that address system functionality issues, incorrectly applied configuration changes, and production aborts (system crashes, abrupt stops, etc.).

3. <u>Ad Hoc</u>
   This project type includes requests that do not require configuration or changes made to the production system functionality. This also includes on-request reports or queries.

Classroom Exercise 1 - 20 minutes

Suggestion: Utilize the easel pad for classroom discussion

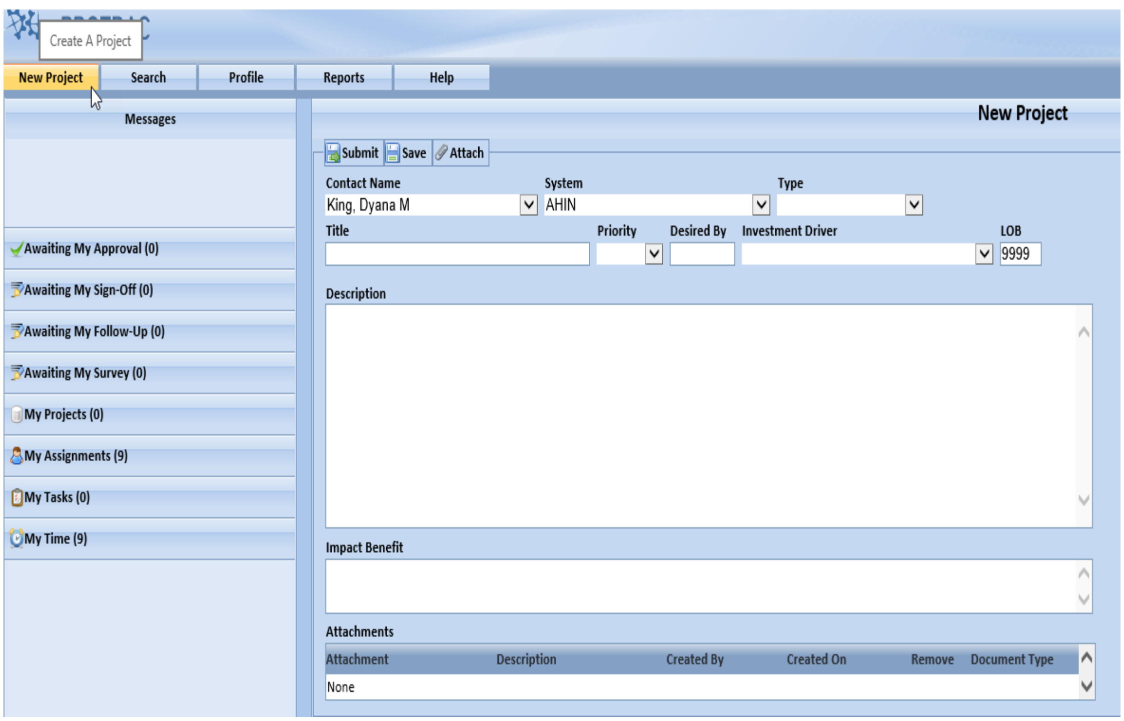
The purpose of this exercise is to help the participants differentiate between each project type and to encourage discussion. This will ensure different job roles (analysts, consultants, etc.) have similar interpretations of the information to avoid discrepancies.

<u>Instructions:</u> Each table will be considered a team and will be given a separate handout sheet. Each handout will contain a scenario in which each table is to collectively agree on what project type the request would be created as and why.

Ten minutes will be given to discuss the scenario and come up with answers. The last ten minutes should be used to allow each table to read their scenarios to the classroom and explain their reason behind the project type chosen.

Required ProTrac Request Fields

To provide a visual of the information discussed, pull up ProTrac on the projector and fill in the required fields on a new project as you discuss each one.



Slide 10

Fields to discuss and fill in:

1. Contact Name
   Note: This person will serve as the contact for any questions/concerns
2. Type
   Note: This was discussed in-depth before the break
3. System
4. Title
5. Priority
6. Desired By
   Note: This is when the project should be completed by
7. Investment Driver
   Note: This is the reason behind why the project should be done. Multiple drivers may be applicable so encourage class to use their best judgement
8. LOB
9. Description
   Note: This requires a detailed description of the request
10. Impact/Benefit

Classroom Exercise 2 – 15 minutes

The purpose of this exercise is to provide a hands-on learning experience with creating a ProTrac request. This will also encourage classroom participation and teamwork as this exercise is to be completed as a class.

Instructions: Each attendee is to receive a handout explaining the need for a system enhancement (same handout for all), which includes a blank ProTrac project sheet.

Ask for volunteers to help read the system enhancement handout and ask open-ended questions to encourage discussion.

Adding Attachments to the ProTrac

Attaching supporting documentation, such as a Word or Excel document, provides more detailed information to those involved in the project. Project specifications and test results must be attached to each ProTrac.

After clicking on the Attach button an “Attachments” pop-up window will appear.

Note: Advise that the user must click Save to attach documents.

Assigning a Project

Projects must be assigned to programmers for coding/development, and to analysts for testing.

After clicking on the Assign button, an “Assignment” pop-up window will appear.

Note: Only supervisors have the authority to assign projects to programmers.

Creating a Task

Project tasks performed must be documented and tracked.

While viewing the project you created during this session, click the “Task” icon and add a new task as management has advised of participants having difficulty with this feature.

Note: Tasks may be created and assigned by almost anyone.

Closing

Wrap up the session by thanking the class for their time and participation. Advise them that surveys about their experience with this training class will be sent to their emails the following week.

Suggestion: Stress the importance of completing the surveys as they allow us to evaluate the strength of the training classes.

Questions/Concerns

If time allows, open up the floor to discuss any questions or concerns the participants may have. If too many questions/concerns arise, have them email them to you. Create a document addressing the questions to send out to all participants the following week.