Demand Initiation in The Hub

*NOTE: Unless otherwise indicated, mouse clicks (single or double) are done using the **left** mouse button.*

1. Create a New Hub Space

NOTE: Proposal Managers usually create the Hub Space for a given project.

NOTE: Most activities in The Hub require permissions. Those permissions are assigned by name and not role.

1.1. Open the URL below to load the **Create Space** dialog box (for the **Active Proposals Hub Space**) on The Hub.

https://thehub.huntsman.com/edit-place.jspa?parentObjectID=2609&parentObjectType=14&containerType=14

1.2. The **Create Space (in Active Proposals)** dialog box is displayed. See figures H1 and H2.

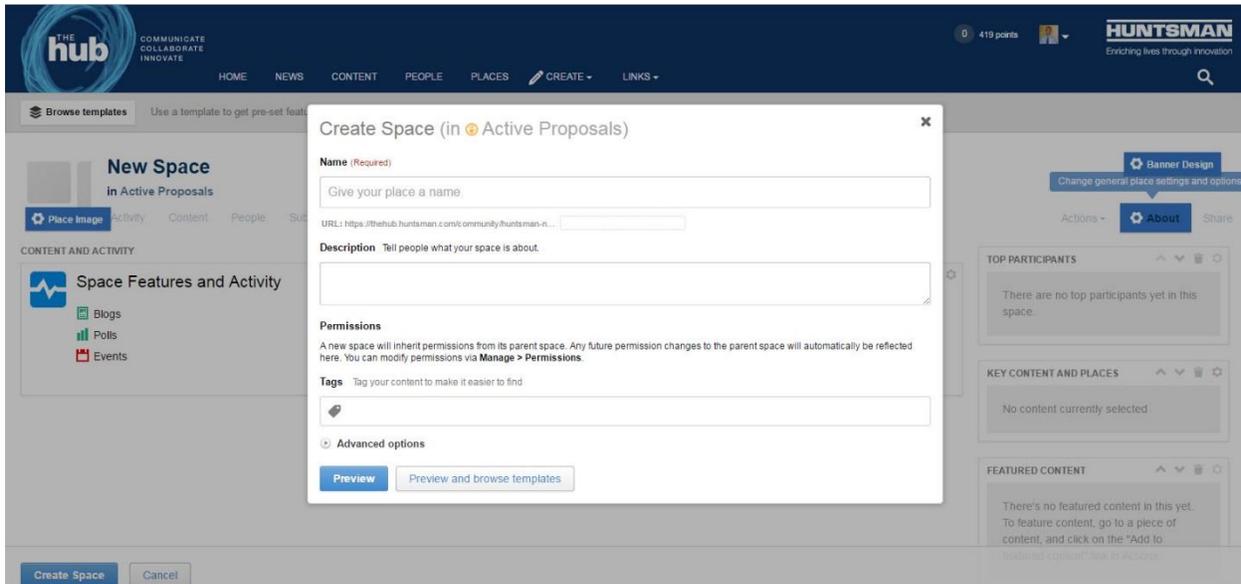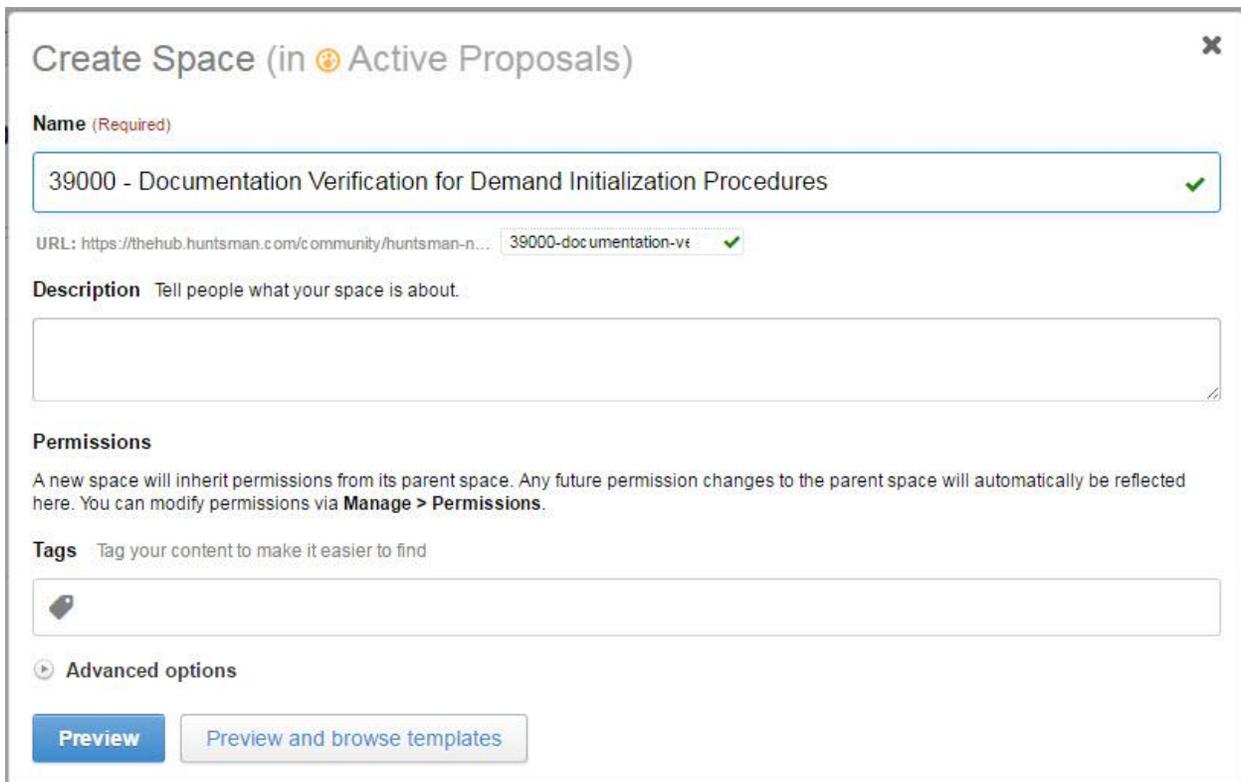Figure H1. Create Space dialog box (near full screen capture).

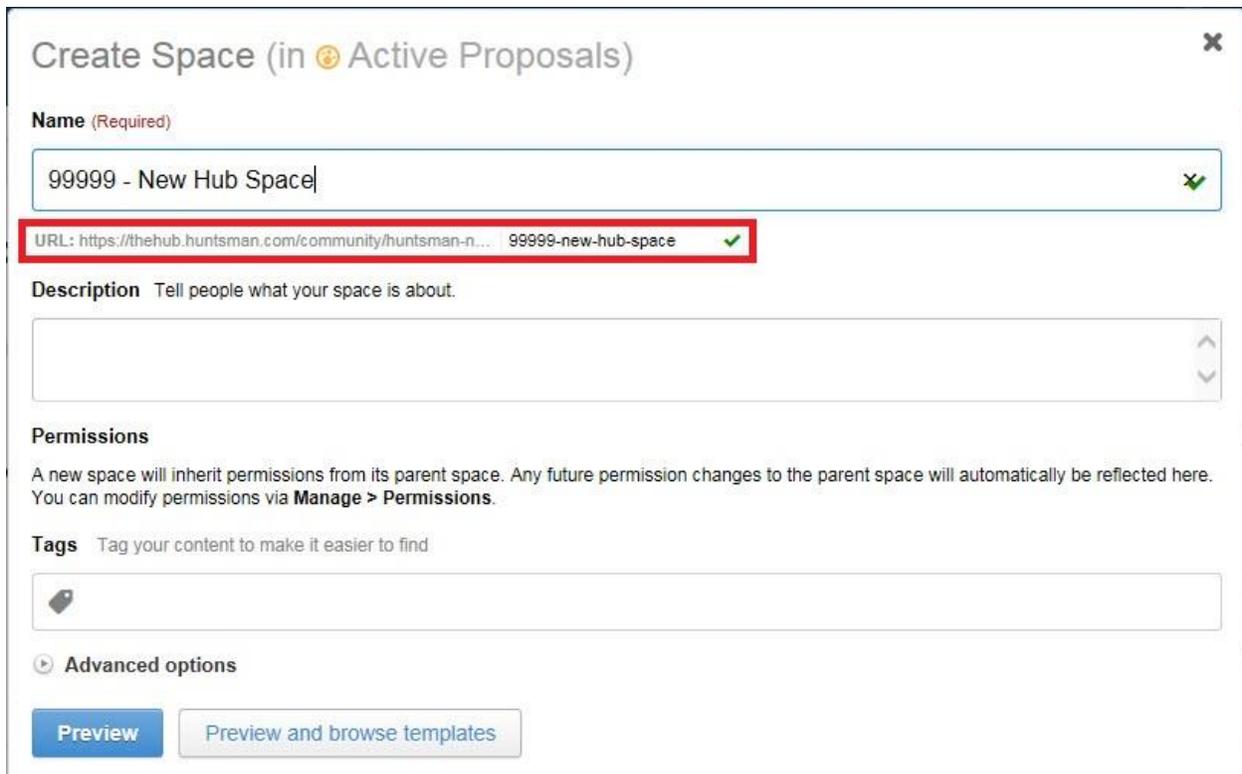Figure H2. Create Space dialog box (dialog box only).

1.3.   Click in the Name data entry field to enter (the name of the Hub Space). Example:
(PMO Number- 5 digits) – (official name of the project) or for example 19211 –
Project Documentation Test.

NOTE: The name of the Hub Space should be the same as the name of the project in the Demand Intake document.

NOTE: The URL for the new Hub Space will appear below the Name data entry field. Make note of the URL. If there is not a green checkmark at the end of the URL field the Hub Space will need to be renamed. See figure H3.

Figure H3. URL with green checkmark (partial screen capture only).

NOTE: The URL can be saved as a favorite in the browser for easy retrieval later.

    1.4.   Click in the **Description** data entry field to enter (a description of the Project for which the Hub Space is being created).

NOTE: Default permissions will be inherited from the parent space (in this case Active Proposals).

    1.5.   Click in the **Tags** data entry field to enter (applicable tags for the Hub Space).

    1.6.   Enter (the text for each tag) and press Enter after the text for each tag is entered.

NOTE: Tags are not case-sensitive; tags entered with capital letters will revert to all lower-case text when saved.

NOTE: At minimum the project number, project name, and the project number and name together should be tagged here to facilitate later searches.

1.7. Click the Advanced options hyperlink to open the **Place navigation** drop down menu

1.8. From the **Place navigation** drop down menu click the radio button next to **Overview**.

1.9. Verify that all data entered and selected is complete and correct.

1.10. Click Preview in the lower left corner of the **Create Space** dialog box. See figure H4.

Figure H4. Create Space dialog box completed (dialog box only).

1.11. After Preview is clicked in the **Create Space** dialog box the new **Hub Space** is displayed with the name provided during space creation.

1.12. Click Create Space in the lower left corner of the dialog box. See figure H5.

Figure H5. Newly created Hub Space.

1.13. After Create Space is clicked the default view for the new **Hub Space** is displayed.

1.14. Click the X in the upper right corner of the **YOU CAN CUSTOMIZE THIS PAGE** dialog box to remove it. See figure H6.

Figure H6. Removing the YOU CAN CUSTOMIZE THIS PAGE dialog box (partial screen capture only).

1.15. From the toolbar at the upper right side of the page click the Manage tab to reveal the dropdown menu for **Manage** options.

1.16. In the **Manage** dropdown menu click Overview page to open the **Edit Place Overview** page. See figure H7.

[5]

Figure H7. Manage Overview page (partial screen capture only).
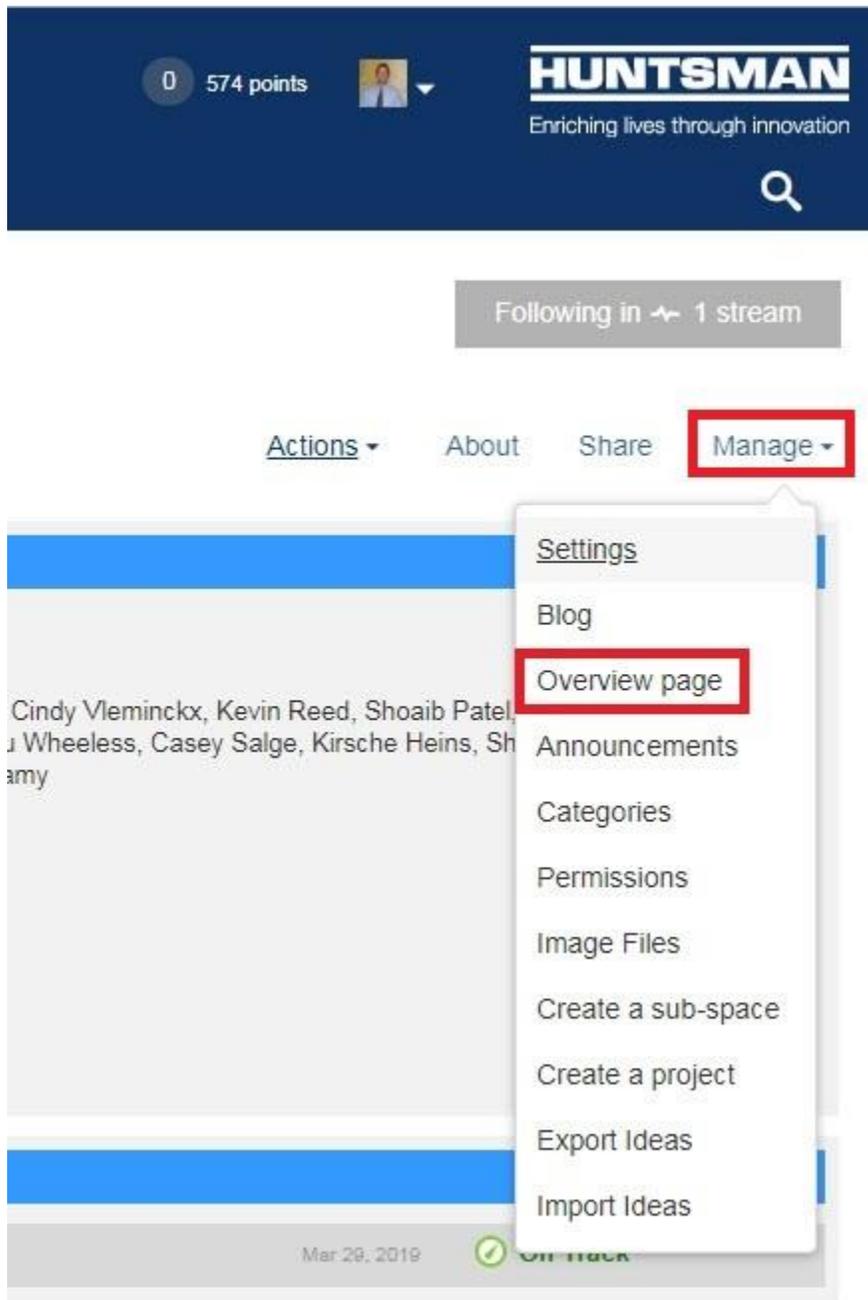
1.17. After Overview page is clicked in the **Manage** dropdown menu the **Edit Place Overview** page is displayed.

1.18. In the **Layout** selection dialog box within the **Edit Place Overview** page click the top left Layout to select it. See figure H8.

Figure H8. Layout selection (highlighted) (partial screen capture only).
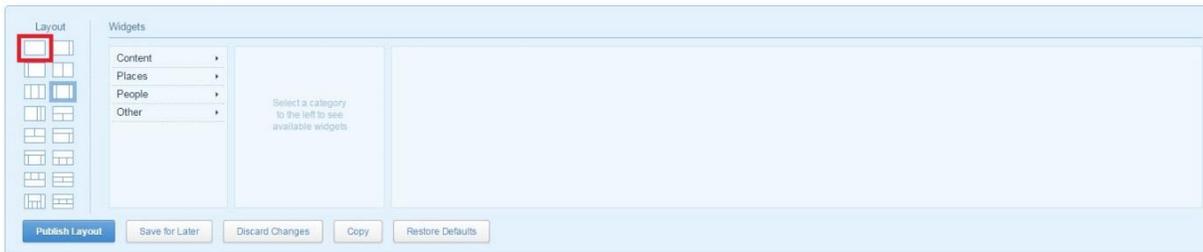
1.19. After the top left Layout is clicked the widgets below and to the right in the **Edit Place Overview** rearrange.

*NOTE: Only the **Space Overview** and **Projects** widgets are required.*

1.20. Remove the widgets that are not needed by clicking on them once to highlight them and then clicking the down caret on the right side of the dialog box and selecting Remove this widget in the dropdown menu to remove each unused widget. See figure H9.

*NOTE: The unused widgets that usually need to be removed are **Spaces, Recent Activity, Actions, and Popular Tags.***

Figure H9. Remove this widget (highlighted) (partial screen capture only).

1.21. Verify the **Space Overview** and **Projects** widgets are the only remaining widgets.

1.22. Verify the data entered and selected is complete and correct.

1.23. After verification click Publish Layout in the lower left portion of the **Edit Place Overview** page. See figure H10.

Figure H10. Publish Layout (highlighted) (partial screen capture only).
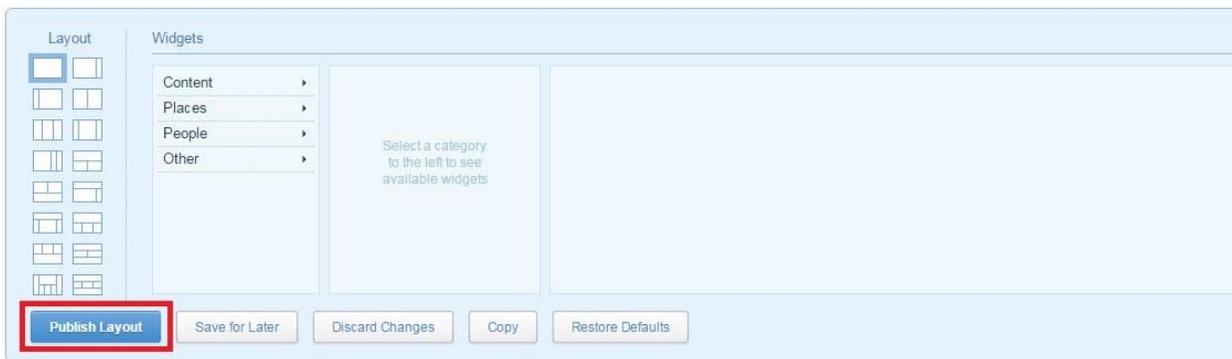
1.24. After Publish Layout is clicked in the **Edit Place Overview** page dialog box a **confirmation dialog box** is displayed. See figure H11.

Figure H11. Confirmation dialog box.
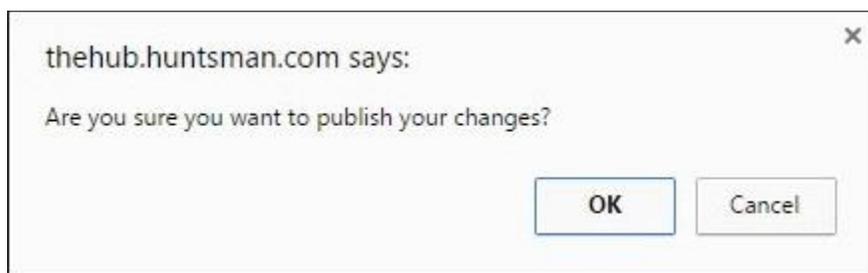
1.25. Click OK in the **confirmation dialog box** to publish the layout for the **Hub Space**.

1.26. After OK is clicked in the **confirmation dialog box** the **Hub Space page** is displayed in the layout specified in the preceding steps. See figure H12.

Figure H12. Created Hub Space.

2. Manage Hub Space Permissions

2.1.   From the toolbar in the upper right portion of the **Project Hub Space** page click the Manage tab to reveal the dropdown menu for **Manage** options.

2.2.   Click on Permissions in the **Manage** drop down menu to reveal the **Space Permissions** dialog box. See figure H13.

Figure H13. Permissions in the Manage dropdown menu (partial screen capture only).
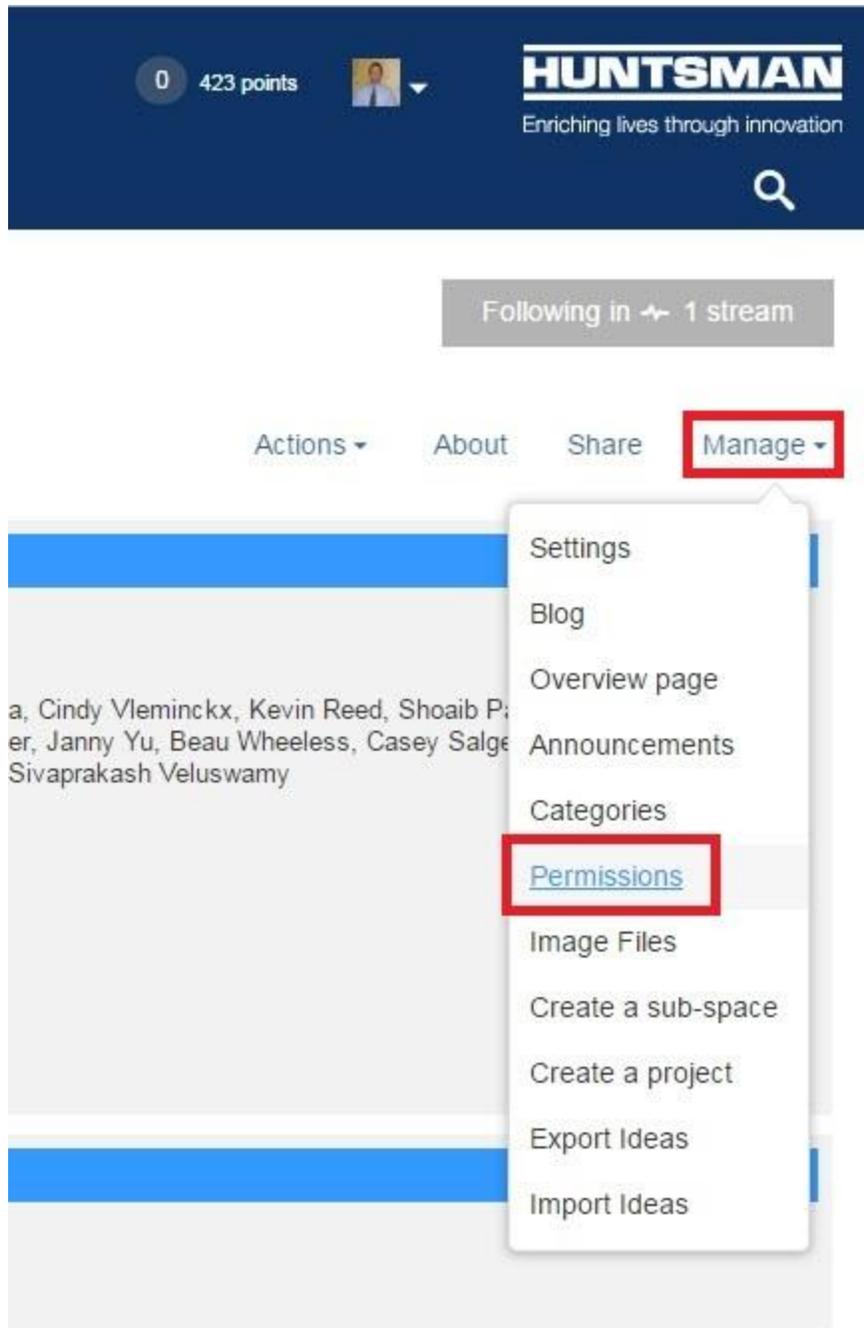
2.3. After Permissions is clicked in the **Manage** dropdown menu the **Permissions For: (Hub Space name)** dialog box appears. See figure H14.

Figure H14. Permissions dialog box (partial screen capture only).
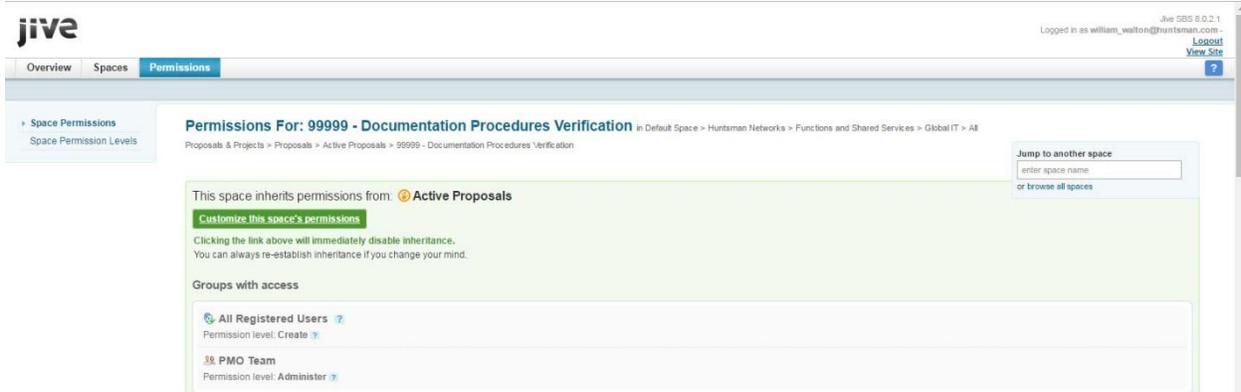
2.4.   Click Customize this space's permissions. See figure H15.

Figure H15. Customize space permissions (partial screen capture only).
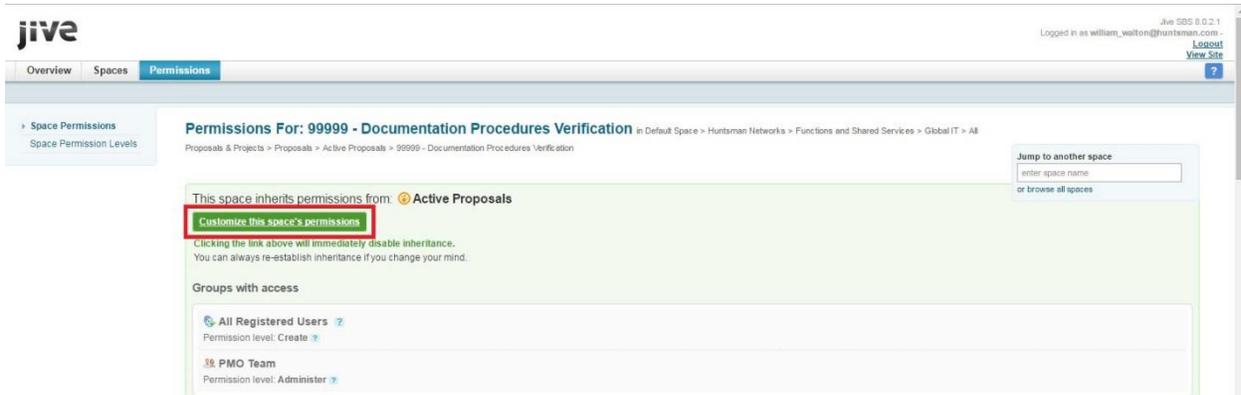
2.5.   Click the Create a user override hyperlink under **User Overrides**. See figure H16.

Figure H16. Create user override hyperlink (partial screen capture only).

Permissions For: 99999 - Documentation Procedures Verification in Default Space > Huntsman Networks > Functions and Shared Services > Global IT > All Proposals & Projects > Proposals > Active Proposals > 99999 - Documentation Procedures Verification

This space is using a custom permission scheme

Re-establish permission inheritance to 🔄 Active Proposals

Groups with access

➕ Add group   🔑 User access check

🔹 **All Registered Users** ?
Permission level: **Create** 📄

👥 **PMO Team**
Permission level: **Administer** 📄

User Overrides ?

➕ **Create a user override**

　Beau Wheeless
　Permission level: **Custom level** 📄

　Casey Salge
　Permission level: **Custom level** 📄

　Chou Nen Ee
　Permission level: **Custom level** 📄

　Cindy Vleminckx
　Permission level: **Custom level** 📄

2.6.　Click in the data entry field that appears under **Create a user override** to enter (the name of the Proposal Manager for the project). Click the name of the Proposal Manager from the displayed names to create a user override for that Proposal Manager. See figure H17.

Figure H17. Name entry (partial screen capture only).

Permissions For: 99999 - Documentation Procedures Verification in Default Space > Huntsman Networks > Functions and Shared Services > Global IT > All Proposals & Projects > Proposals > Active Proposals > 99999 - Documentation Procedures Verification

This space is using a custom permission scheme

Re-establish permission inheritance to 🔄 Active Proposals

Groups with access

➕ Add group   🔑 User access check

🔹 **All Registered Users** ?
Permission level: **Create** 📄

👥 PMO Team
Permission level: **Administer** 📄

User Overrides ?

➕ Create a user override

Start typing to find a user

[　　　　　　　　　] Set exception

2.7. Once the name of the Proposal Manager appears in the data selection field next to the **Set exception** button, click Set exception to create a user override for the Proposal Manager. See figure H18.

Figure H18. Set exception (partial screen capture only).
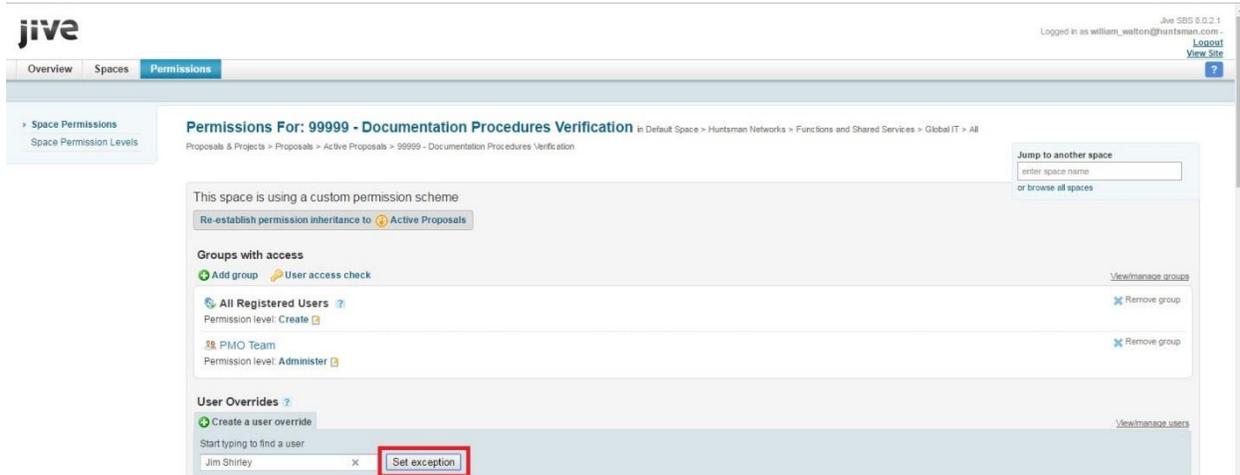
2.8. After Set exception is clicked in the **Permissions For: (Hub Space name)** dialog box a **Set exception for (name)** dialog box appears. See figure H19.

Figure H19. Set exception for (name) dialog box (full screenshot).

Access and administration

○ No access (this User will not be able to view the space)
Negative overrides might not function properly with all External Storage providers

● User can access space

○ User can manage space (select for options)

Content types

External Objects

[Create ▼] Permits creating and commenting on external activity.

Discussions

[Create ▼] Permits creating new discussions, replying to and viewing discussions, and adding attachments to discussions.

Polls

[Create ▼] Permits creating, commenting on, and voting in polls.

Blog Posts

[Create ▼] Permits creating and commenting on blog posts.

Documents

[Create ▼] Permits creating, commenting on, rating, and adding attachments to documents.

Videos

[Create Video ▼] Permits creating, commenting on, rating, and viewing videos.

**Content Shares**

[Create ▼] Permits creating shares to content published in other places.

Ideas

[Create ▼] Permits creating and commenting on ideas.

Reports

[View ▼] Permits viewing reports.

Events

[Create ▼] Permits creating, commenting on, and viewing events.

Additional permissions

☐ **Create Projects**
When checked, allows these users to create a project in the space

☐ **Create Announcements**
When checked, allows these users to create announcements

☐ **Manage News Streams**
When checked, allows these users to manage news streams.

[Save] [Cancel]

2.9.   Near the top of the **Set exception for (name)** dialog box, click the ⬚radio button⬚ next to **User can manage space (select for options)**.

2.10. After the radio button next to **User can manage space (select for options)** is clicked in the **Set exception for (name)** dialog box the menu changes and selection options displayed are altered. See figure H20.

Figure H20. User can manage space (partial screen capture only).
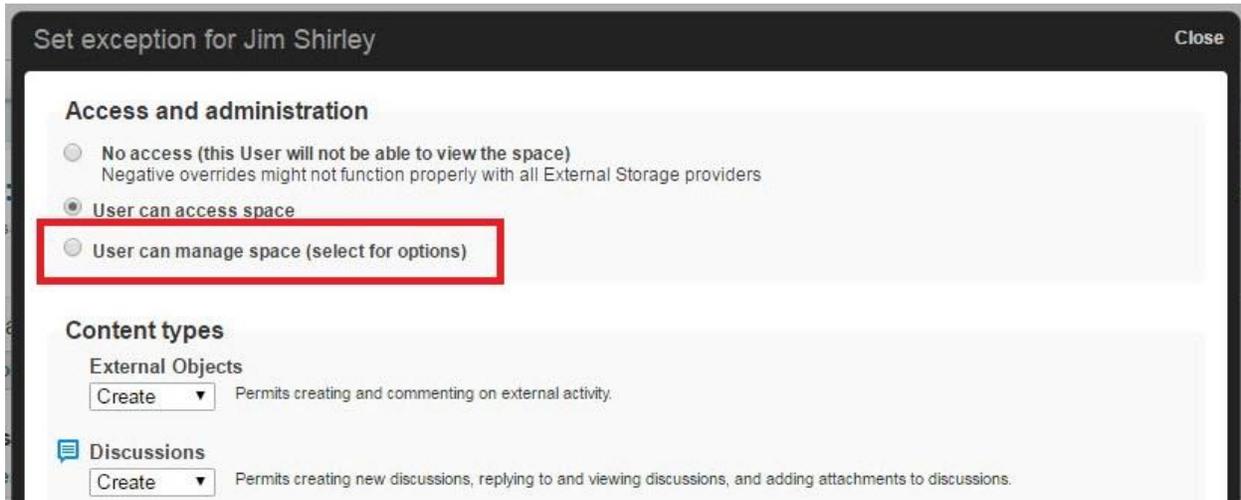
2.11. Immediately under the **User can manage space** radio button (select for options), click the check box to the left of **Full Control** and the check box to the left of **Moderate** to select both options. See figure H21.

Figure H21. User can manage space (select for options) selections (partial screen capture only).
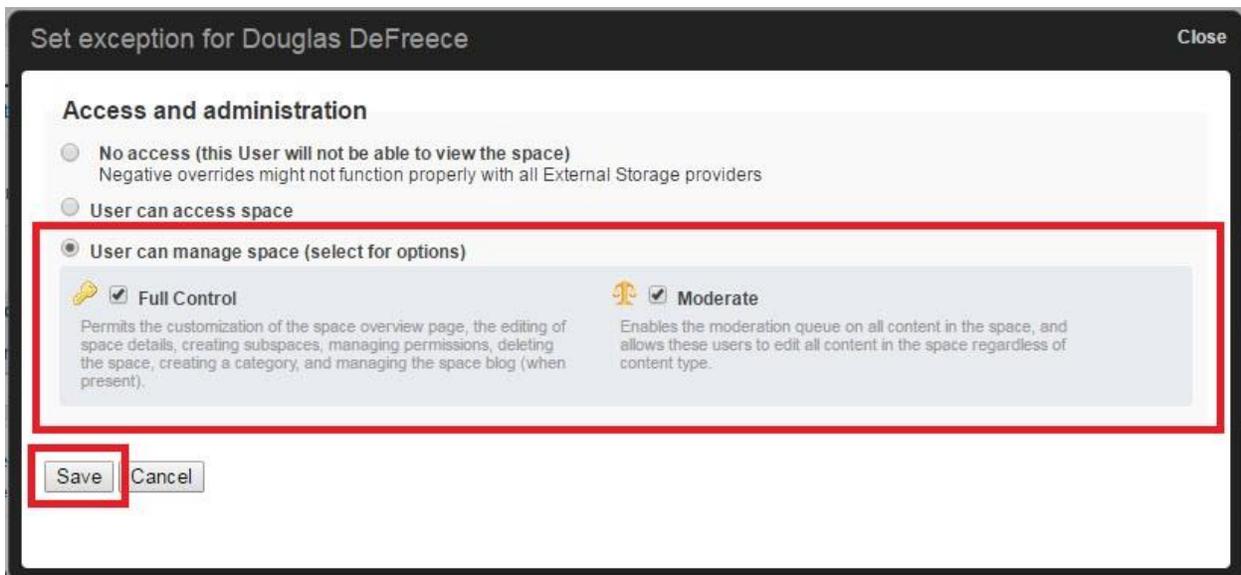
2.12. Verify that all data entered and selected is complete and correct.

2.13. After verification click Save in the lower left portion of the **Set exception for (name)** dialog box to create the exception. See figure H21 (above).

2.14. After Save is clicked in the **Set exception for (name)** dialog box a confirmation that the Override was added very briefly appears. See figure H22.

Figure H22. Override added confirmation (partial screen capture only).
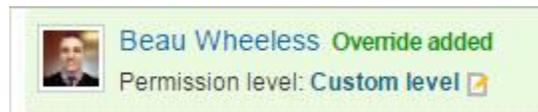
2.15. Return to the **User Overrides** dialog box.

2.16. Verify that (the Proposal Manager) appears in the list of exceptions.

2.17. The Proposal Manager now becomes the owner of the project in The Hub.

2.18. Close the browser window.
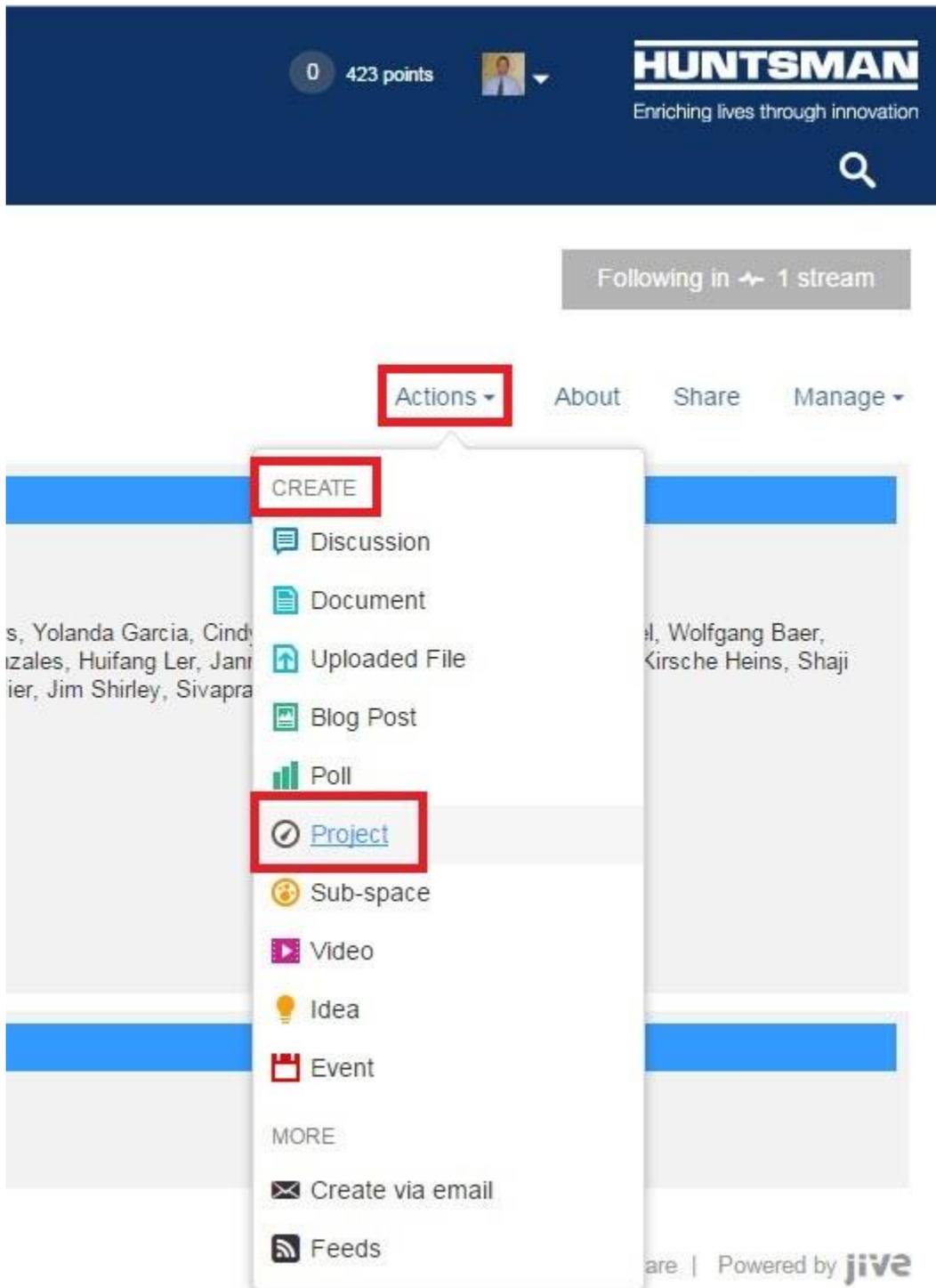
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3. Create a Project in The Hub Space

3.1. The Hub Space and the Hub Project are named exactly the same. Only the icons displayed for the Hub Space and the Hub Project are different. See figure H23.

Figure H23. Hub Project (left) and Hub Space (right) icons.
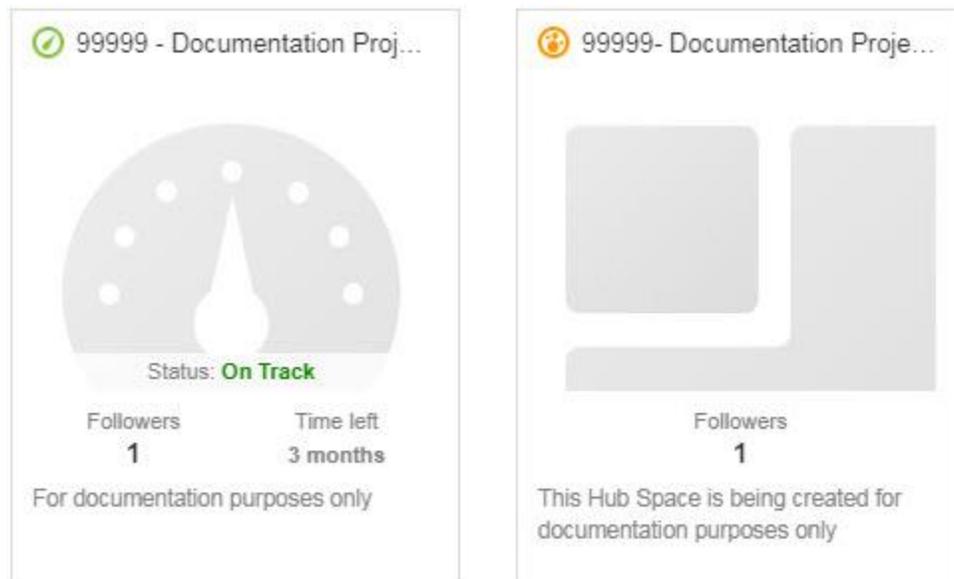
3.2. From the toolbar at the top of the **Hub Space for the Project**, click **Actions** to reveal the **CREATE** dropdown menu.

3.3. Click Project in the **CREATE** menu. See figure H24.

Figure H24. Project creation (partial screen capture only).

3.4. After Project is clicked in the **CREATE** dropdown menu the **Create Project** dialog box appears. See figure H25.

Figure H25. Create Project dialog box.

Figure H26. Create Project dialog.

3.5. Click in the **Name** data entry field to enter (<u>exactly the same case-sensitive name entered when creating the Space</u>). Example: 33924 – Rockwood Backoffices & IT Integration - Ariba. Copy the name from the Hub Space and paste it into the Hub Project **Name** data entry field if necessary.

3.6. Click in the **Description** data entry field to enter (<u>a concise description for the project</u>).

3.7. Click in the **Project Start Date** data entry field to select (<u>the scheduled date for the start of the project in the month/date/year format</u>) from the calendar date selection tool.

3.8. Click in the **Project End Date** data entry field to select (<u>the scheduled date for the conclusion of the project in the month/date/year format</u>) from the calendar date selection tool. See figure H26.

Figure H26. Project Date entries.

3.9. Select the **Project Owner** by clicking the down caret next to the **Project Owner** data selection field and clicking the name of the Project Owner from the listed names in the dropdown menu to select it.

NOTE: The default Project Owner for the new Hub Project is the creator of the Hub Project.

3.10. Click in the **Tags** data entry field to enter (applicable tags for the Hub Space).

3.11. Enter (the text for each tag) and press Enter after the text for each tag is entered.

NOTE: Tags are not case-sensitive; tags entered with capital letters will revert to all lower-case text when saved.

3.12. Click the Advanced options hyperlink near the bottom of the dialog box.

3.13. The selection options for **Place navigation** are displayed

3.14. Click the radio button next to **Overview** in the **Place navigation** options list.

3.15. Verify all data entered and selected is correct and complete.

3.16. Click Preview in the lower left portion of the dialog box. See figure H27.

Figure H27. Create Project dialog box (complete).

Create Project (in ⊙ 99999 - Documentati...) ✕

Name (Required)

99999 - Documentation Procedures Verification   ✓

Description Tell people what your project is about.

Test Only

Project Start Date (Required) 12/3/2018   **Project End Date** (Required) 5/31/2019

Project Owner (Required)

👤 William Walton ✕

Tags Tag your content to make it easier to find

🏷 documentation ✖ the hub training ✖ pmo hub training ✖ procedures ✖ task verification ✖

⊙ **Advanced options**

Place navigation

○ **Activity + Pages**
Configure a stream-driven Activity page for this place, plus additional custom-created pages in a tabbed view. The left-hand tab is the default landing page.

● **Overview**
Configure a widget-based Overview page as this place's landing page.

○ **Activity + Overview**
Configure both an Activity page and an Overview page, either of which can be the landing page.
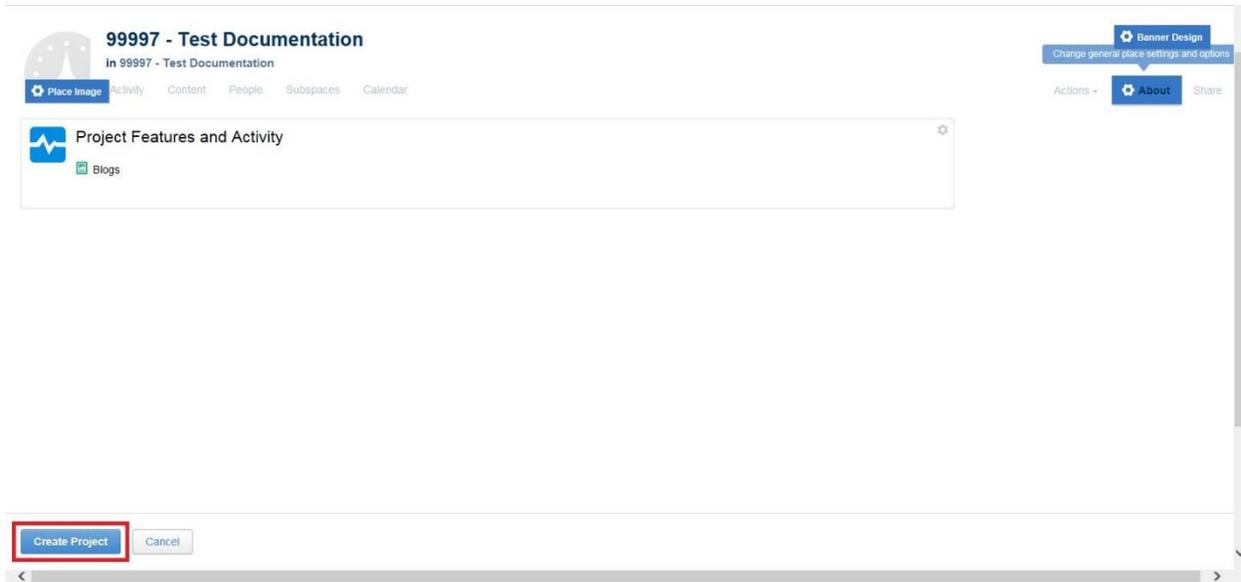
Note: When the Overview page is displayed, any existing tile pages will be hidden.

Preview   Preview and browse templates

3.17.   The **Create Project** page is displayed. See figure H26.

3.18.   In the lower left corner of the **Hub Space** screen click Create Project. See figure H28.

Figure H28. Create Project page.

After Create Project is clicked in the **Create Project** page the **Project Page** is displayed. See figure H29.

Figure H29. Project Page inside the Project Hub Space.

3.19.   The **Project** and the **Hub Space** are both now created in The Hub. The link at the bottom of the **Space Overview** for the **Hub Space** with the speedometer displayed to its left is the **Project Page link**. See figure H30.

Figure H30. Project Page link in the Space Overview screen.
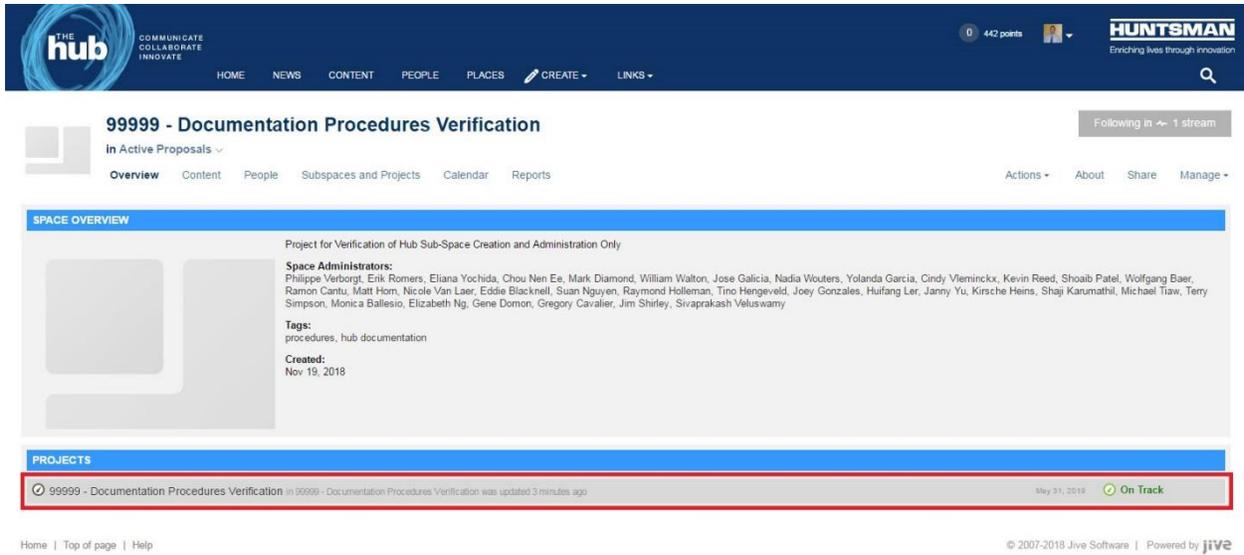
3.20. Click the $\boxed{X}$ in the upper right portion of the **YOU CAN CUSTOMIZE THIS SPACE** dialog box. See figure H31.

Figure H31. Removing the YOU CAN CUSTOMIZE THIS PAGE dialog box (partial screen capture only).
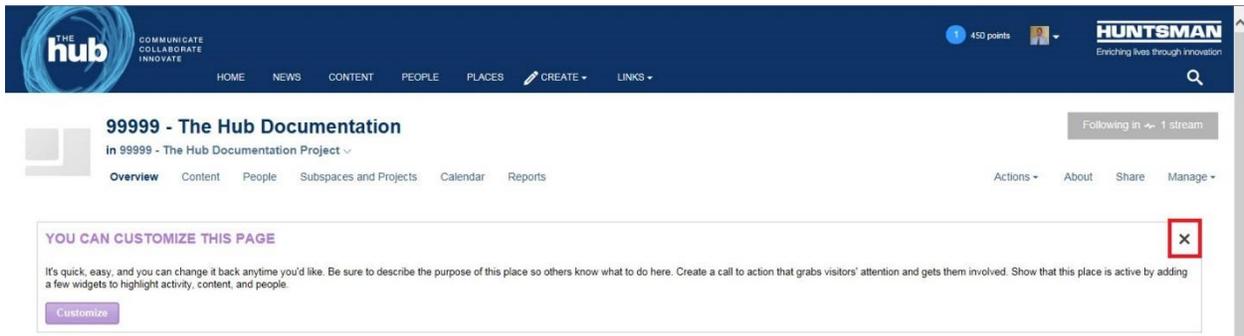
3.21. Tasks, content, discussions, and project information can now be entered in the **Active Proposal** Hub Space (also called a container) using the **Actions** menu at the top of the page. When the planned project becomes an official project the Hub Project will be moved to the **Active Project** Space.

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4. Upload Documents to the Hub Space

N*OTE: All project documentation will be uploaded to and maintained in The Hub.*

4.1. From within the **Project Hub Space** click the $\boxed{\text{Actions}}$ menu to reveal the **Create** dropdown list.
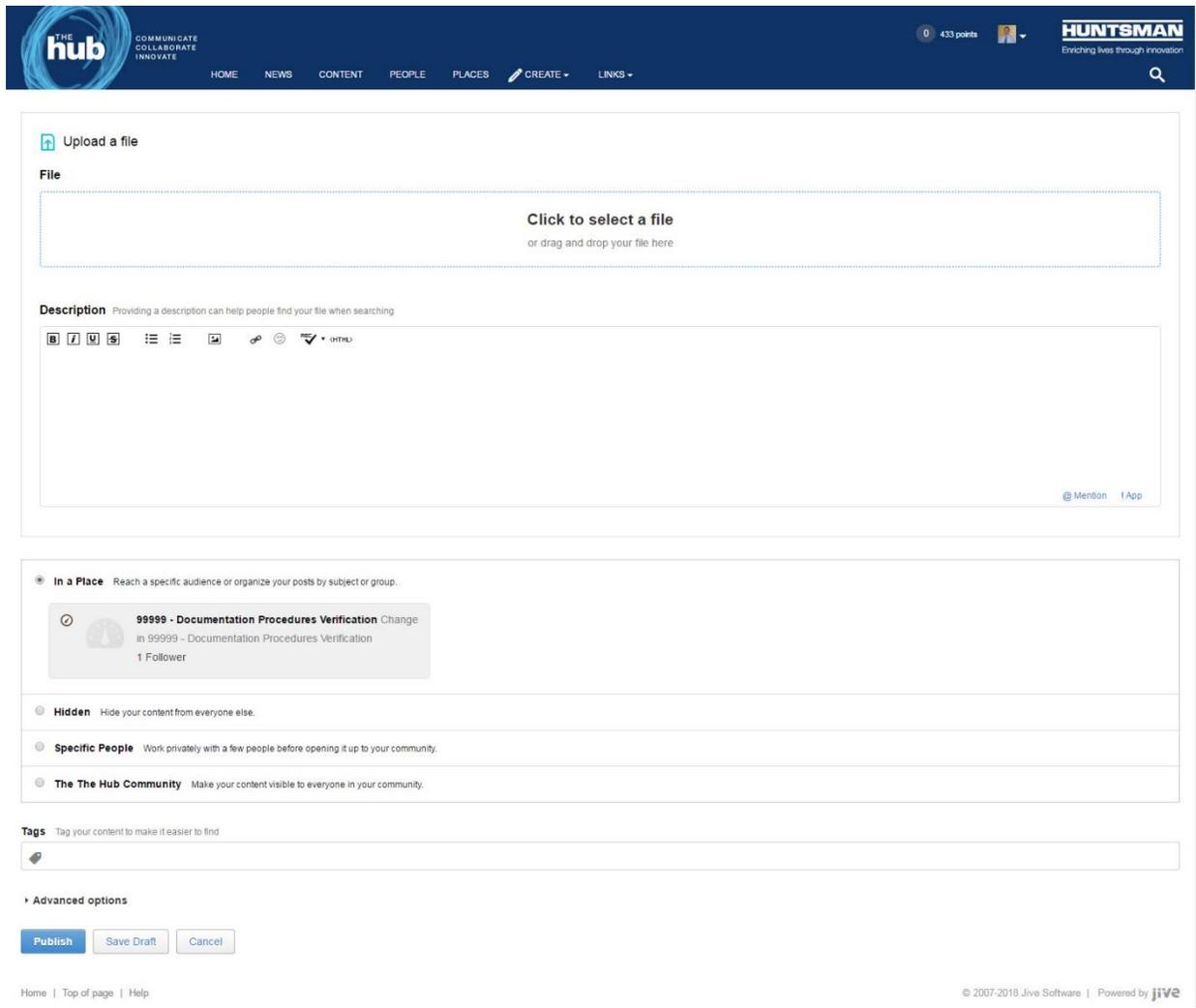
4.2.   From the **Create** dropdown menu select Uploaded File to upload a file to the sub-
        space. See figure H32.

Figure H32. Uploaded File in the Create menu (partial screen capture only).
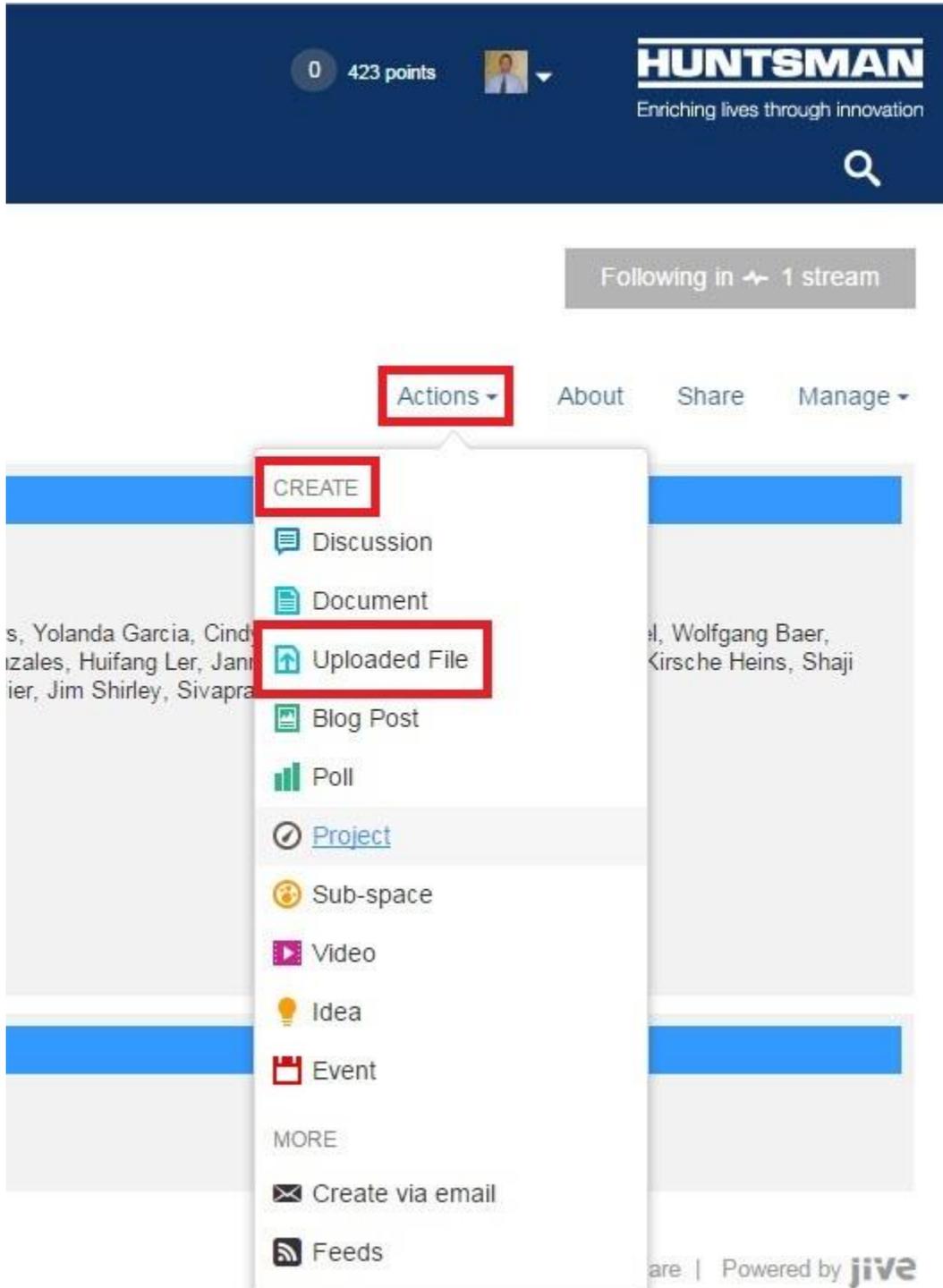
4.3.   After Uploaded File is clicked in the **Create** dropdown menu the **Upload a file** Hub
        page is displayed. See figure H33.

Figure H33. Upload a file Hub page.

4.4.   Click the Click to select a file hyperlink in the **File** block to open a **Windows Choose
        a File to Upload** selection dialog box. See figure H34.

Figure H34. Click to select a file hyperlink (partial screen capture only).

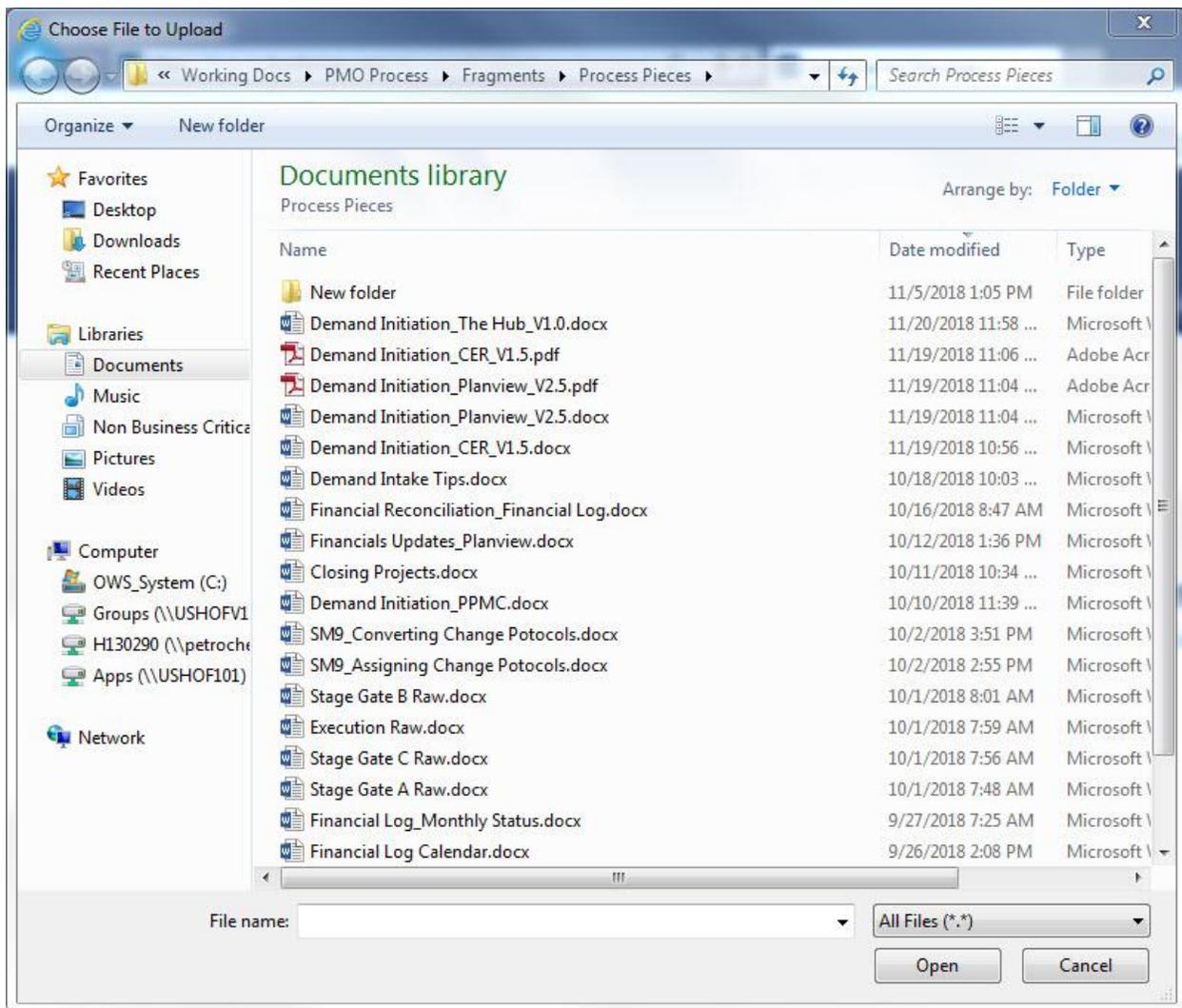4.5.   After the Click to select a file hyperlink is clicked the **Windows Choose a File to Upload** selection dialog box is displayed. See figure H35.

Figure H35. Windows Choose a File to Upload selection dialog box.

4.6.   Locate the file to be uploaded to the project sub-space.

4.7.   Once the file is located double click the file name to upload it to The Hub.

4.8.   After the file name to be uploaded is double clicked the hyperlink in the **File** data block is changed to the name of the file to be uploaded to The Hub. See figure H36.

Figure H36. File uploaded to The Hub (partial screen capture only).
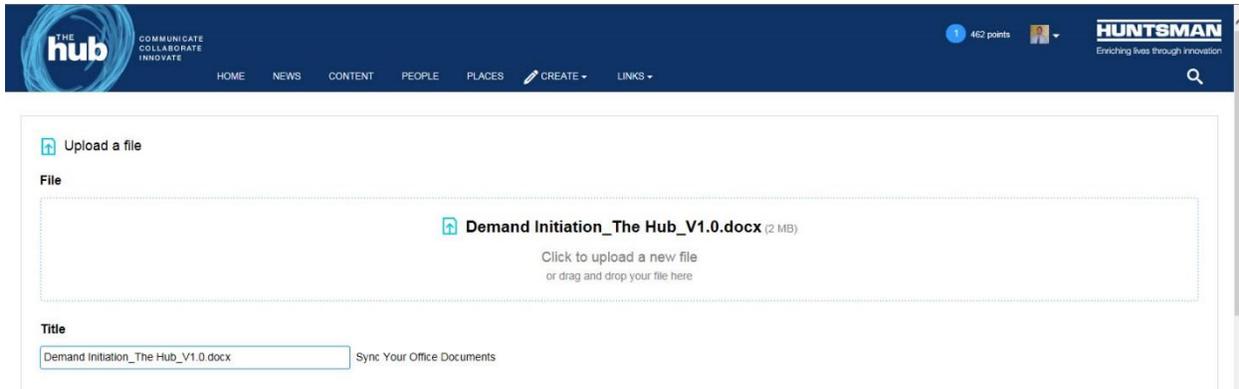
4.9.   The **Title** field is prefilled with the name of the file uploaded.

NOTE: The title of the file can be altered here if necessary but the file will remain the same as the source file unless altered.

4.10.   Click in the **Description** data entry field to enter (<u>a description of the file</u>).

4.11.   The radio button next to **In a Place** for the file location will be selected by default. The Hub Space to which the file was uploaded should be displayed next to the radio button.

NOTE: If for some reason the file is to be shared outside the project sub space the other options can be selected using the radio buttons next to each option.

4.12.   Click in the **Tags** data entry field to enter (<u>applicable tags for the Hub Space</u>).

4.13.   Enter (<u>the text for each tag</u>) and press Enter after the text for each tag is entered.

NOTE: Tags are not case-sensitive; tags entered with capital letters will revert to all lower-case text when saved.

NOTE: At minimum the project name should be tagged here to facilitate later searches.

4.14.   Click the Advanced options hyperlink to reveal the available advanced options.

4.15.   Click the radio button next to **Restrict authors** to enable editing restrictions.

NOTE: Specific people can be selected and granted editing rights here.

4.16.   Click the radio button next to **Require approval before publication** to enable pre-publication approval requirements.

NOTE: Specific people can be selected as pre-publication approvers here.

4.17.   Click the radio button next to **Restrict comments** to enable restrictions on comments.

NOTE: There is no specificity to this function; options are limited to all comments allowed or no comments allowed.

    4.18.   Verify all data entered and selection chosen are complete and correct.

    4.19.   Click Publish in the lower left corner of the screen to upload the file. See figure H37.

NOTE: If necessary the upload can be saved as a draft and executed later.

Figure H37. Publishing the Upload (partial screen capture only).
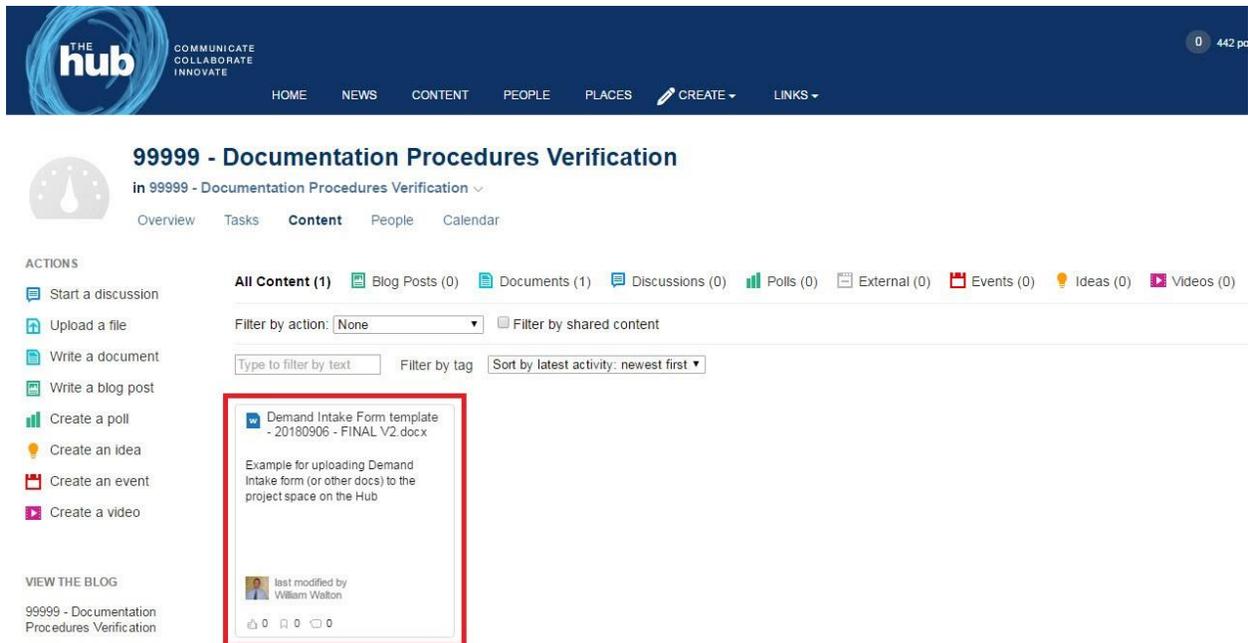
4.20. After Publish is clicked in the **Upload file** dialog box the uploaded file appears in the Hub Space. See figure H38.

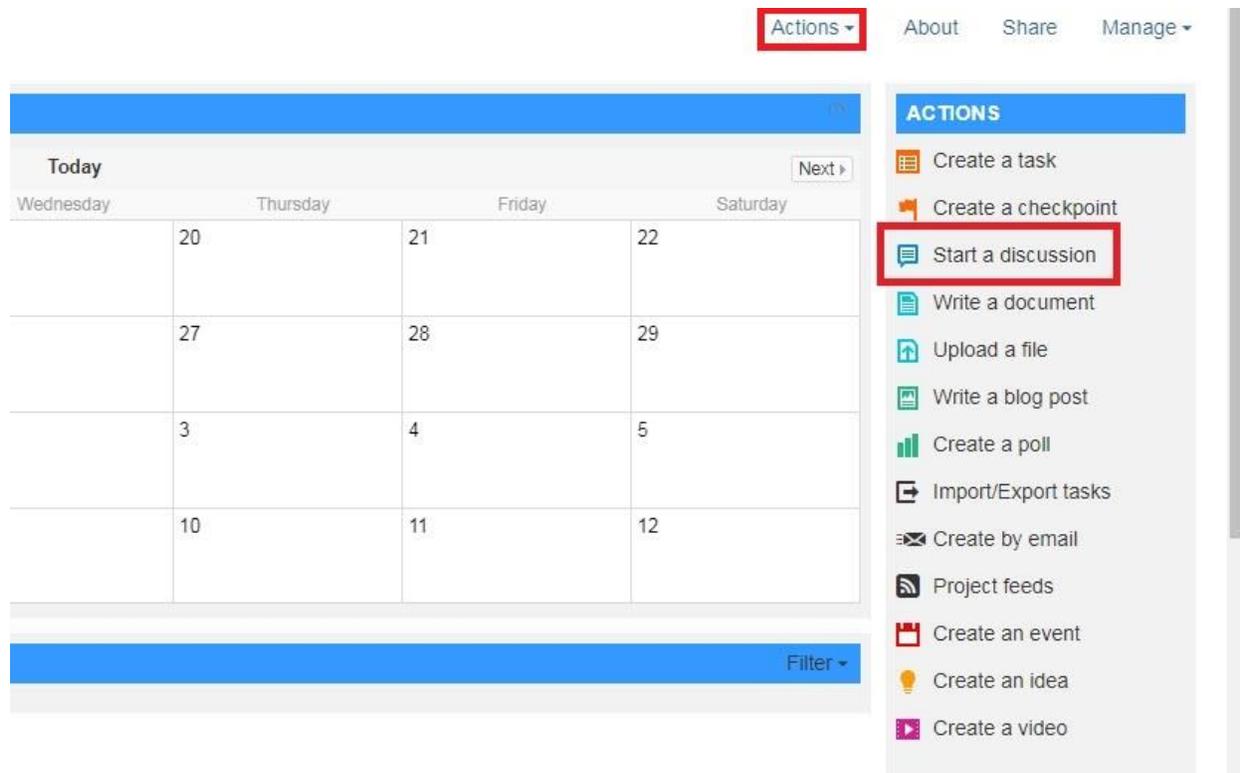Figure H38. Completed upload appearing in the Project Hub Space (partial screen capture only).

5. Request Project Approvals in The Hub- via Discussion

5.1. From within the **Hub Project** under the **Actions** menu on the right side of the screen click Start a discussion. See figure H39.

Figure H39. Start a discussion (partial screen capture only).

5.2.   The **Start a discussion** dialog box is displayed. See figure H40.

Figure H40. Start a discussion dialog box (modified vertically compressed screen shot- the actual Hub page is taller).
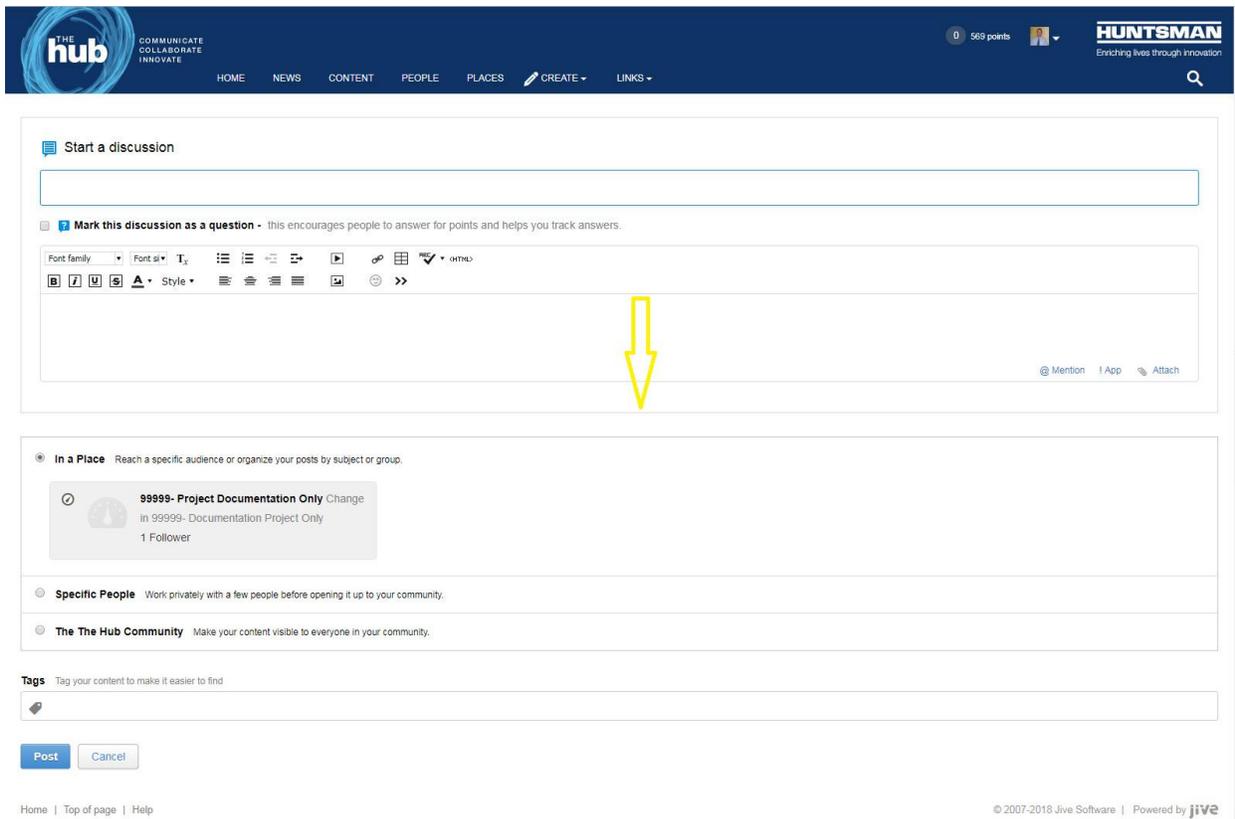
5.3. Click in the Discussion Title data entry field (under **Start a discussion** at the top of the screen) to enter the (title of the discussion). See figure H41.
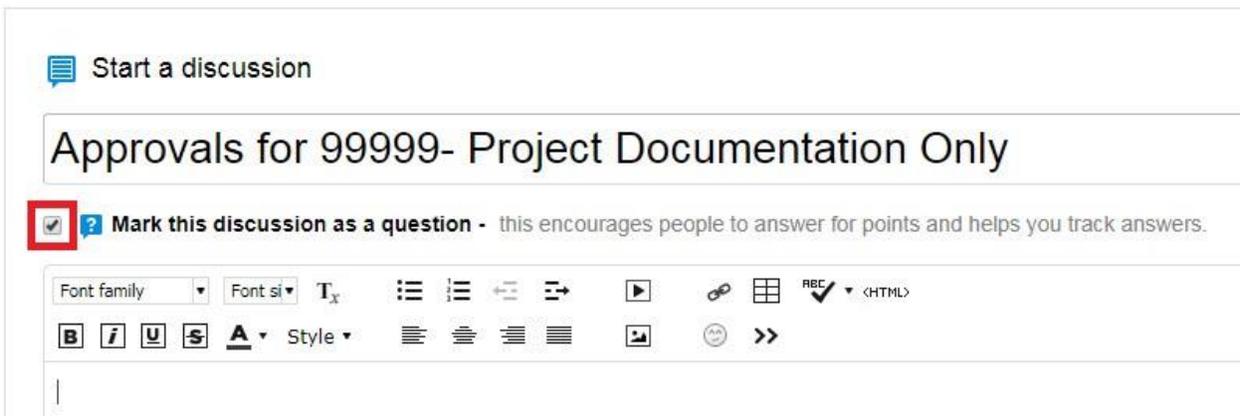
NOTE: The title of the discussion should at a minimum contain the name of the project and indicate the discussion is meant to process approvals for the project.

Figure H41. Discussion title entry field (partial screen capture only).
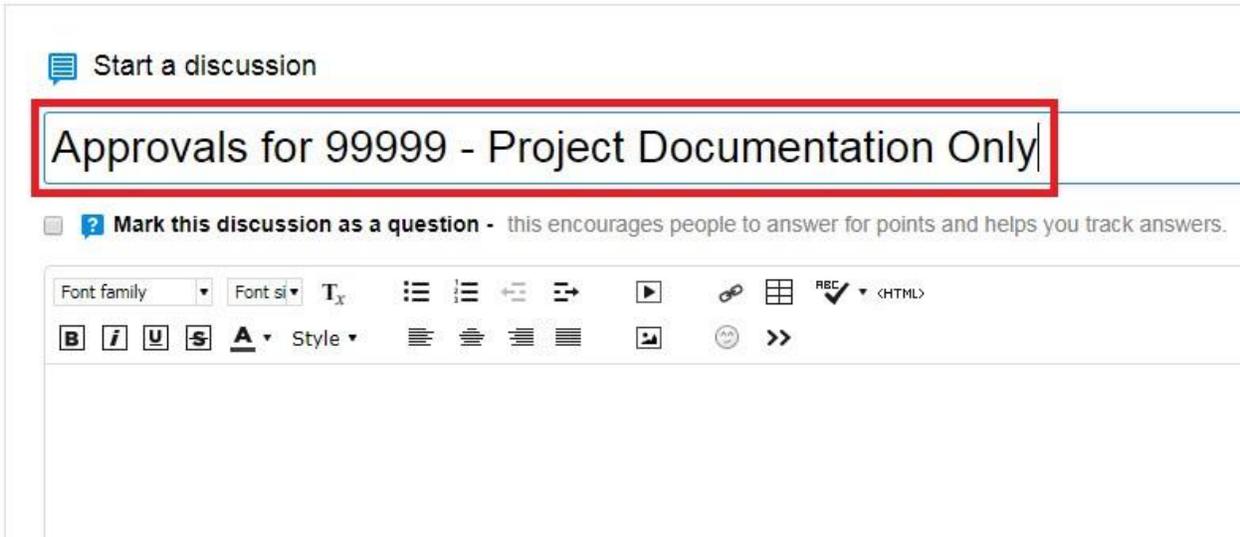
5.4.   Click the checkbox next to **Mark this discussion as a question** to enable answer tracking. See figure H42.

Figure H42. Mark this discussion as a question (partial screen capture only).

5.5.   Click in the data entry field below **Mark this discussion as a question** to enter the (text description of the discussion). See figure H43.

NOTE: The text description should contain reference to the project approval process and indicate the presence of a link to the Demand Intake document for the project.

Figure H43. Text data entry field (partial screen capture only).
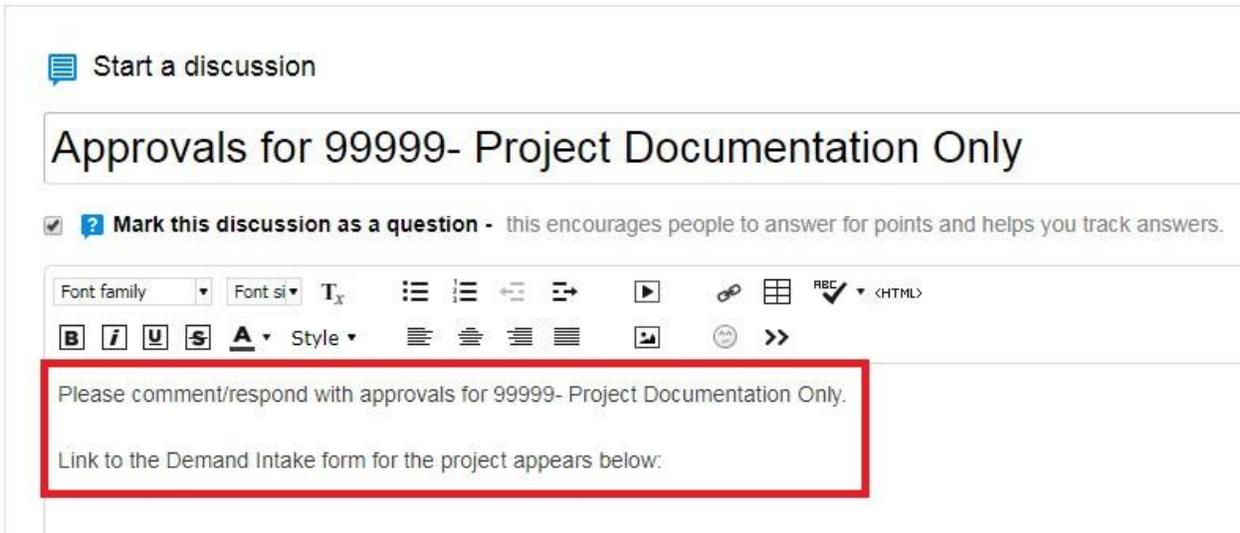
5.6.   Click the Insert Link icon in the toolbar above the text entry field to create a hyperlink to the Demand Intake document. See figure H44.

Figure H44. Insert link icon (partial screen capture only).
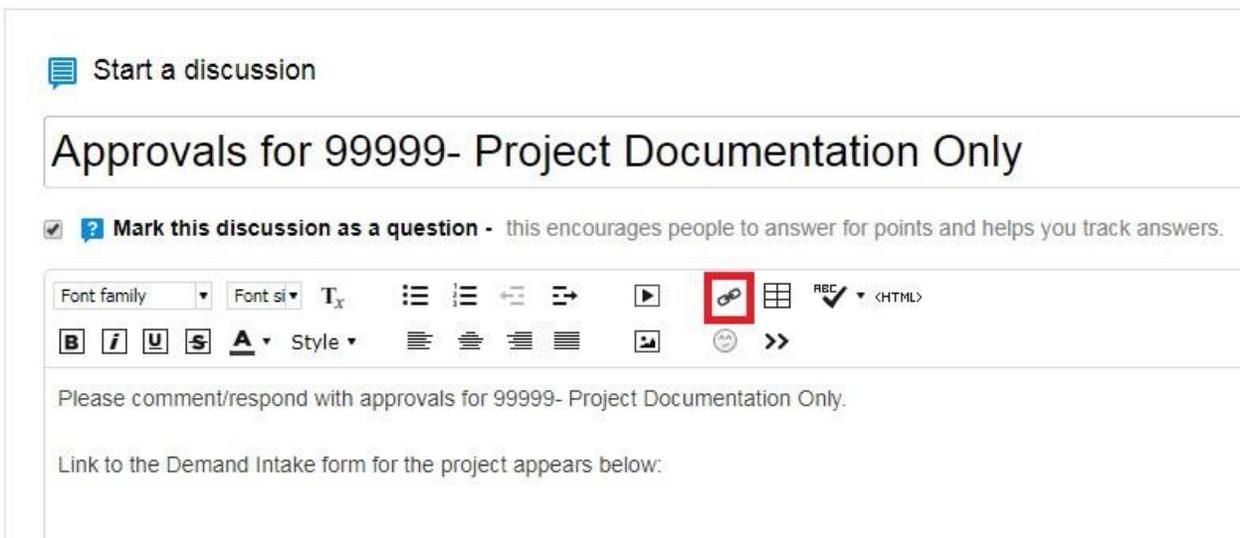
5.7.   The **Insert Link** dialog box is displayed.

5.8.   Paste the (URL for the Project Demand Intake document) in the **URL:** text entry field. See figure H45.

NOTE: The All Content hyperlink in the Insert Link dialog box launches a search function. The Browse History hyperlink in the Insert Link dialog box launches a list of recently visited

documents and projects. Either All Content or Browse History can also be used to link the
Demand Intake form.

Figure H45. URL text entry data field and Insert (partial screen capture only).

5.9. Click Insert in the lower right corner of the **Insert Link** dialog box. See figure H45 (above).

5.10. The link to the Demand Intake document now appears in the data entry field. See figure H46.

Figure H46. Hyperlink to the Demand Intake document in the data entry field (partial screen capture only).

5.11. Click the radio button next to **Specific People** in the sharing selection area. See figure H47.

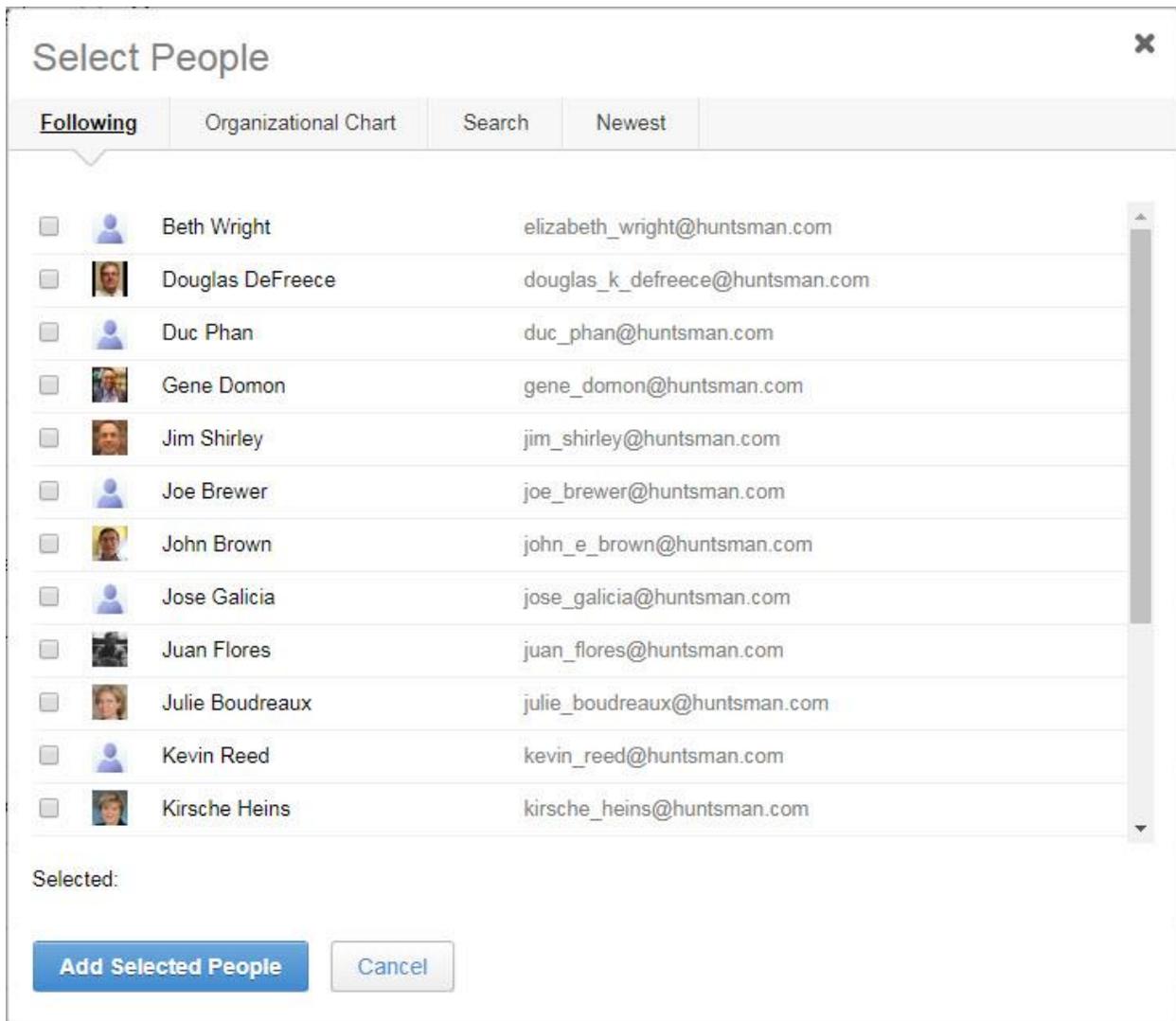Figure H47. Radio button next to Specific People (partial screen capture only).

5.12. Click the Select People icon next to the **Specific People** data entry field. See figure H48.

Figure H48. Select People icon (partial screen capture only).
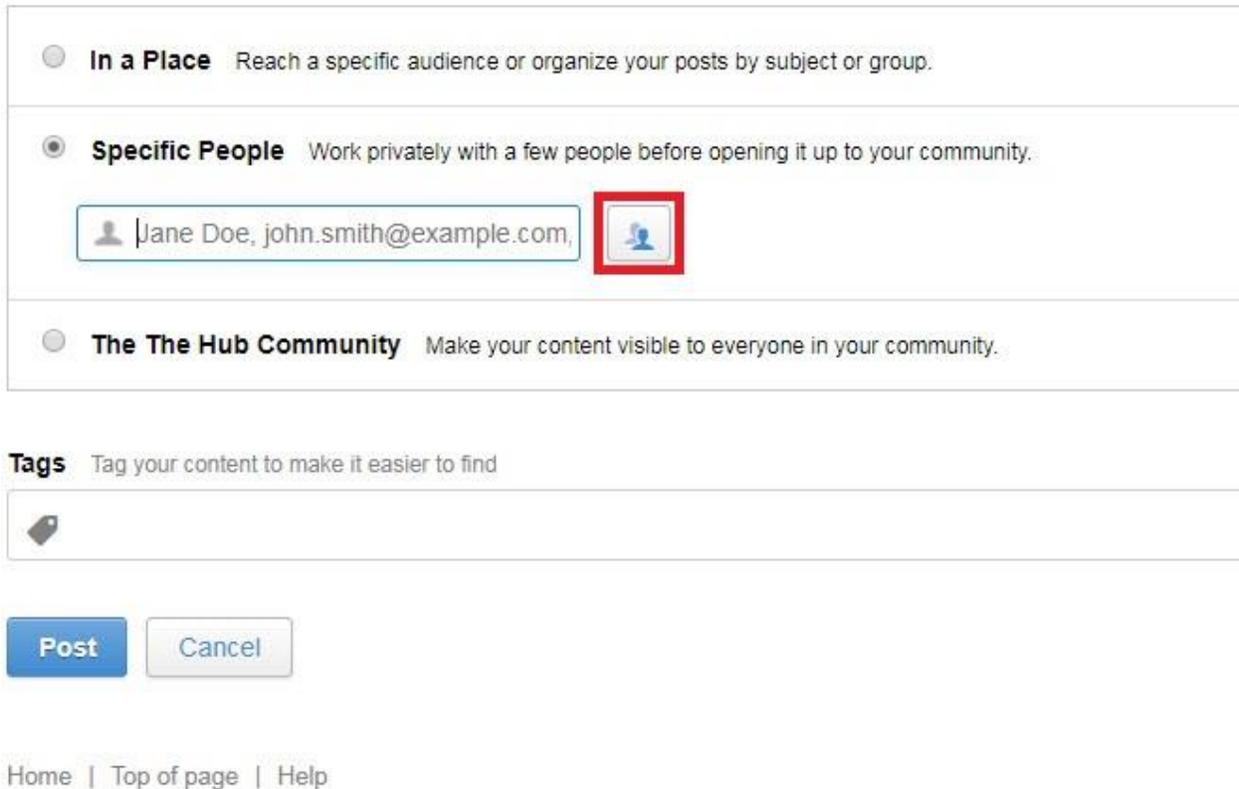
5.13. The **Select People** dialog box is displayed. See figure H49.

Figure H49. Select people dialog box.

5.14. Using the data in table 1 (below) select the approvers for the project using steps 5.15 and 5.16 (below the table).

Table 1. Project Approval personnel.

Stage Gate A	Approver	Work Type 1	Work Type 2	Work Type 3
Business Relationship Manager	Varies by Tower	Mandatory	Mandatory	Mandatory
Tower Approval #	Varies by Tower	Mandatory	Mandatory	Mandatory
Stage Gates B and C	Approver	Work Type 1	Work Type 2	Work Type 3

Security and Compliance	**Sharon Lippe**	**Mandatory**	**Mandatory**	**Mandatory**
Finance	**Lisa Bracken**	**Mandatory**	**Mandatory**	**Mandatory**
Governance/Project Management Office	**John E Brown**	**Mandatory**	**Mandatory**	**Mandatory**
Project Portfolio Management Center	Varies by Tower	**Mandatory**	Optional	
Service Introduction	**Mike Dowling**	Optional	Optional	
Operations	**Eng Hung Goh**	Optional	Optional	
Project and Contract Services	**Bennett Edwards III**	Optional	Optional	
End User Services	**Mike Dowling**	Optional	Optional	
Mergers & Acquisitions and Data & Analytics	**Param Moothath**	Optional	Optional	
Global Business Process	**Greg Cavalier**	Optional	Optional	
Manufacturing and Engineering	**Kirsche Heins**	Optional	Optional	
Collaboration and Mobility	**Paul Crowcroft**	Optional	Optional	
Sourcing and Contracts *	**Stan Hospod**	Optional	Optional	

NOTE: * = only if external vendor resources need to be sourced.

NOTE: Ensure any resource commitments and/or approvals received are recorded on the relevant hub space. The approval date by PMO will be used as the Stage Gate C approval date.

NOTE: Projects of work type 3 are expected to be run mostly with resources within their own tower. Only if additional IT areas need to deliver resources not covered by standard processes (= any work covered by existing work type 4 or work type 5 requests), resource commitments would need to be obtained.

5.15.   Click the checkbox to the left of each approving person listed in the **Select People**
         dialog box. See figure H50.

*NOTE: Use the scroll bar on the right side of the **Select People** dialog box to view and select*
*additional personnel.*

*NOTE: The **Following** list is the default indicated list of personnel from which to choose the*
approvers. The user would be well served to follow the approvers listed below so they appear in
the default list. Click the Organizational Chart hyperlink to view the personnel in the same
organization as the user. Click the Search hyperlink to manually enter names for which to
search. Click the Newest hyperlink to view the personnel who have joined the company.

Figure H50. Select People dialog box with some approvers selected.
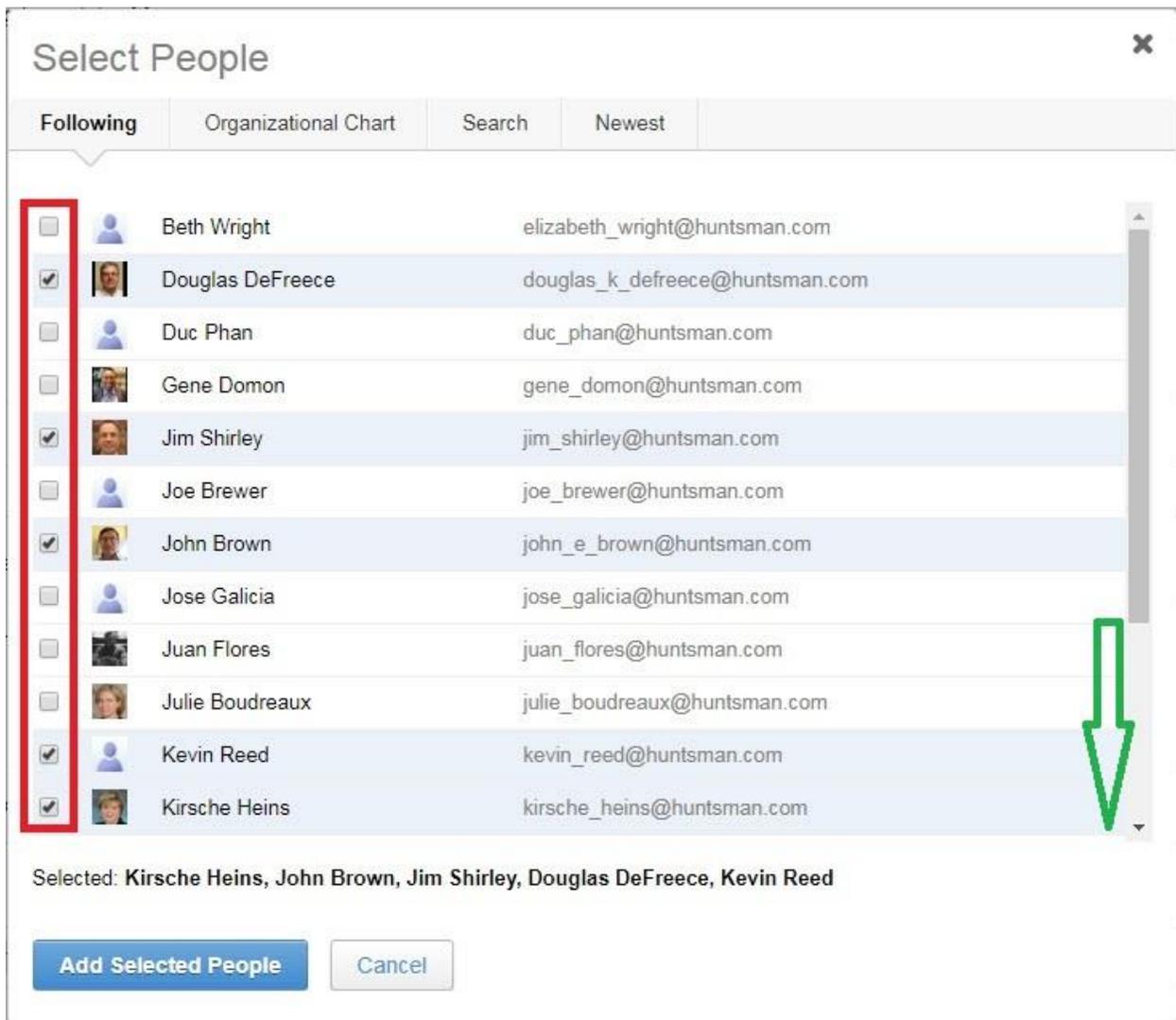
5.16. Once all approving personnel are selected in the **Select People** dialog box click Add Selected People in the lower left corner of the **Select People** dialog box. See figure H51.

Figure H51. Add Selected People.
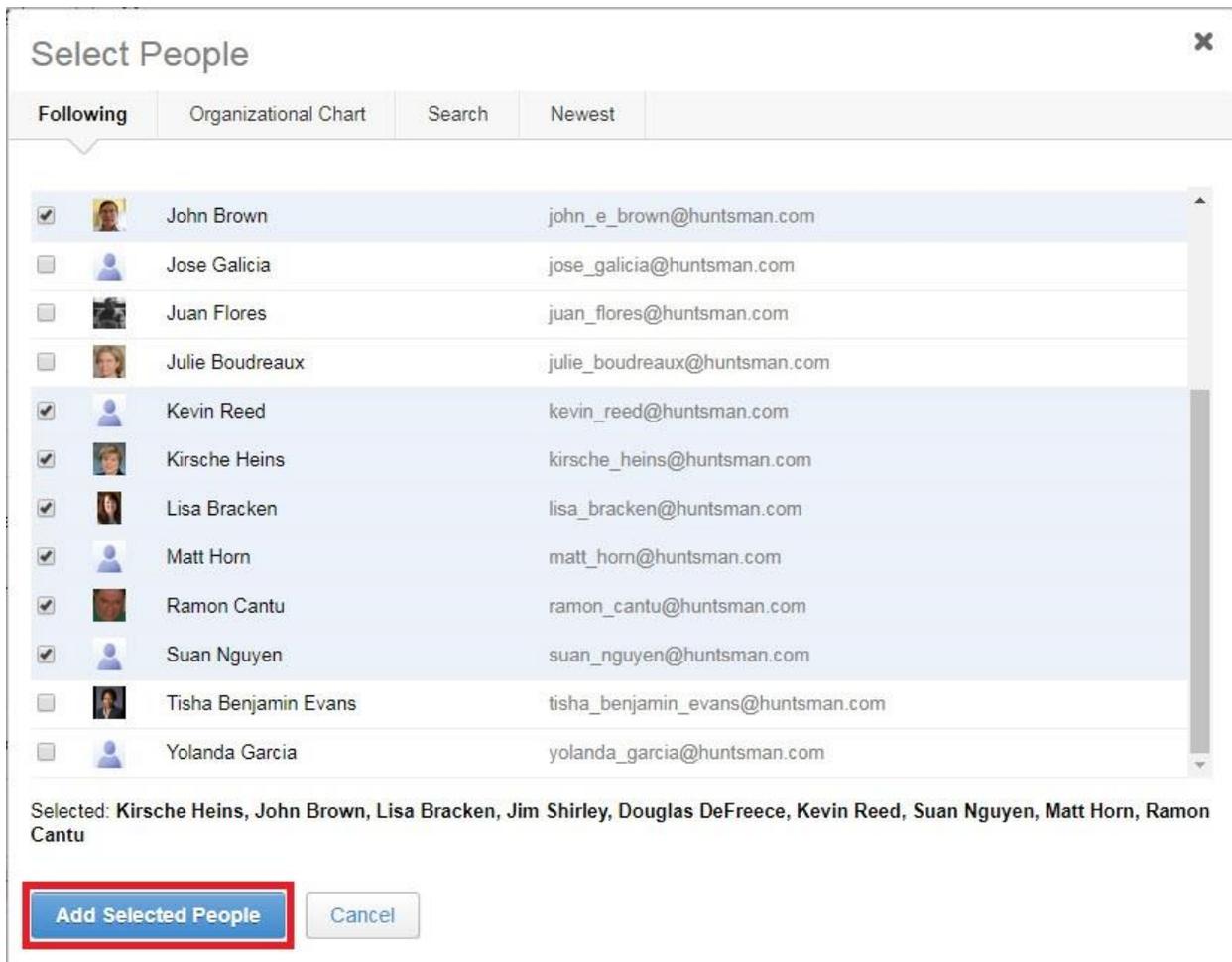
5.17. After clicking Add Selected People in the **Select People** dialog box the selected people appear as the **Specific People** listed in the sharing section. See figure H52.

Figure H52. Selected people listed under Specific People (partial screen shot only).

5.18. Click in the Tags data entry field to enter (applicable tags for the Discussion).

5.19. Enter (the text for each tag) pressing Enter after the text for each tag is entered in the **Tags** data entry field. See figure H53.

NOTE: Tag the project number and full project name, the project number separately, the project name separately, and any other pertinent information.

NOTE: Tags are not case-sensitive when saved; tags entered with capital letters will revert to all lower-case text when saved.

Figure H53. Tags as entered in the Tags data entry field (partial screen capture only).

5.20. Verify all data entered and selected is complete and correct.

5.21. Click Post in the lower left corner of the **Start a discussion** screen to publish the discussion in the **Hub Project**. See figure H54.

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Figure H54. Completed Start a discussion screen with Post highlighted (modified vertically compressed screen shot-the actual Hub page is taller).

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