The Demand Intake Initiation Process in Planview

Stage Gates B and C

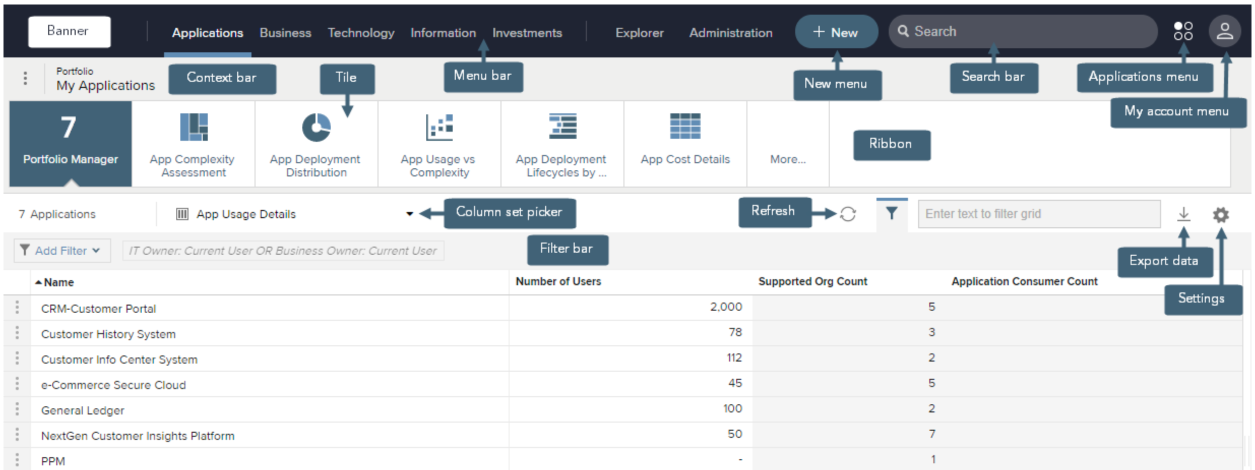
NOTE: The procedure for Demand Intake Initiation in Planview when Stage Gate B and Stage Gate C are combined (Stage Gate C only) is located here.

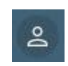
1. Planview Conventions and General Information

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

1.2. Register for the Planview Customer Success Center here.

Figure PVD1. General Planview user interface functionalities.



1.3. Access the **Preferences** dialog box by clicking the head and shoulders icon  in the upper right corner of the **My Overview** screen menu bar.

NOTE: Preferences remain set once initially selected unless they are changed later.

1.3.1. Click **General** on the left side of the **Preferences** dialog box and click the down caret next to **Timescale** on the right side, then click Months to select that preference from the listed options in the dropdown box.

1.3.2. Click **Resources** on the left side of the **Preferences** dialog box and click the down caret next to **Timescale** on the right side, then click Months to select that preference from the listed options in the dropdown box.

1.3.3. Click **Financial and Investment Planning** on the left side of the **Preferences** dialog box and click the down caret next to **Currency Scale** on the right side, then click Standard to select that preference from the listed options in the dropdown box.

1.3.4. Also in the **Financial and Investment Planning** menu of the **Preferences** dialog box click the down caret next to **Currency Decimal Precision** on the right side, then click zero [0] to select that preference from the listed options in the dropdown box. See figures PVD2, PVD3, (and) PVD4.

Figure PVD2. Preferences / General.

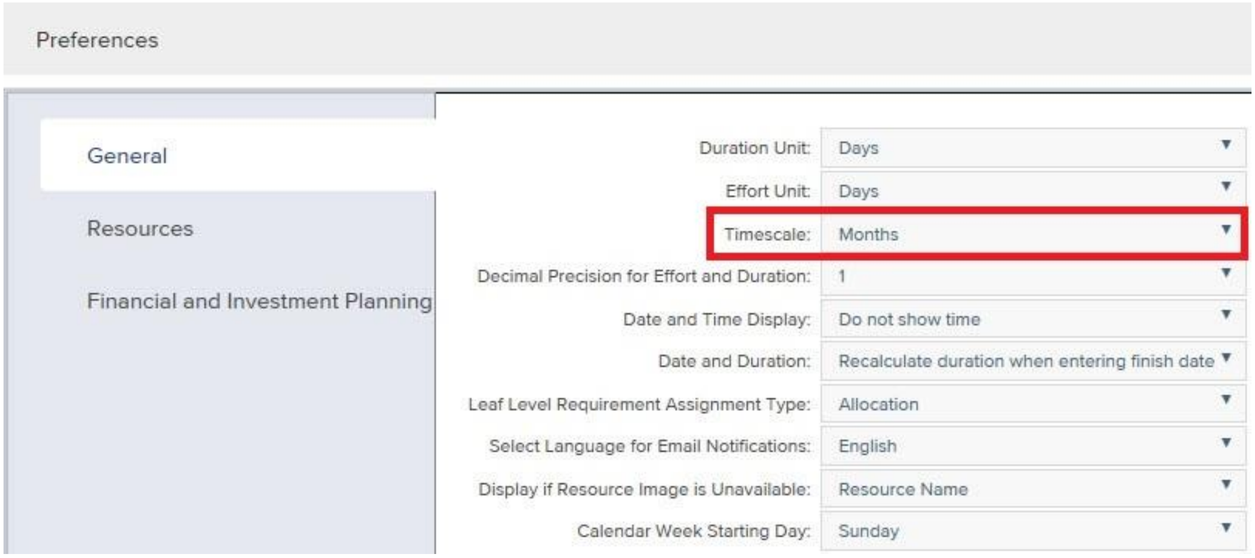


Figure PVD3. Preferences / Resources.

Figure PVD4. Preferences / Financial and Investment Planning.

1.4. If the user is loading a future year portfolio (not the current reporting year), the user should not move forward beyond the Demand Intake input process. The workflow is restarted when the stage gating process begins.

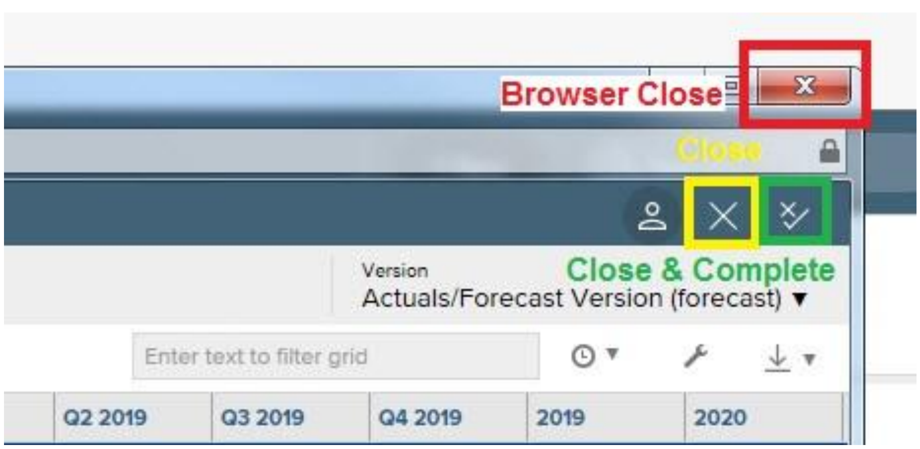
1.5. Only a Project Manager, Project Manager Lead, Proposal Manager, Proposal Manager Lead, or Planview Admin associated with a project can view and/or edit that project. Portfolio Managers can view the entire portfolio.

1.6. Planview is a browser-based tool running in a browser window (or windows). As such it does not install in the user's local PC and is available from anywhere the user is able to securely access the internet.

1.7. *Because* Planview is a browser-based tool running in a browser window (or windows), **do not** use the browser close icon to exit the tool. Use only the Planview Close icon (the X in the upper right corner of the toolbar) when in the **Work and Resource Management** screen (or) the Close & Complete icon in the **Financial Planning Details** screen to stop working in Planview. Work is **not** saved if the browser session itself is closed instead. See figures PVD5 (and) PVD6.

Figure PVD5. Work and Resource Management screen showing the Application Close icon in green and the browser close icon in red (partial screen capture only- the actual Planview screen displays additional information).

Figure PVD6. Financial Planning Details screen showing the Close & Complete icon in green, the Application Close icon in yellow, and the browser close icon in red (partial screen capture only- the actual Planview screen displays additional information).

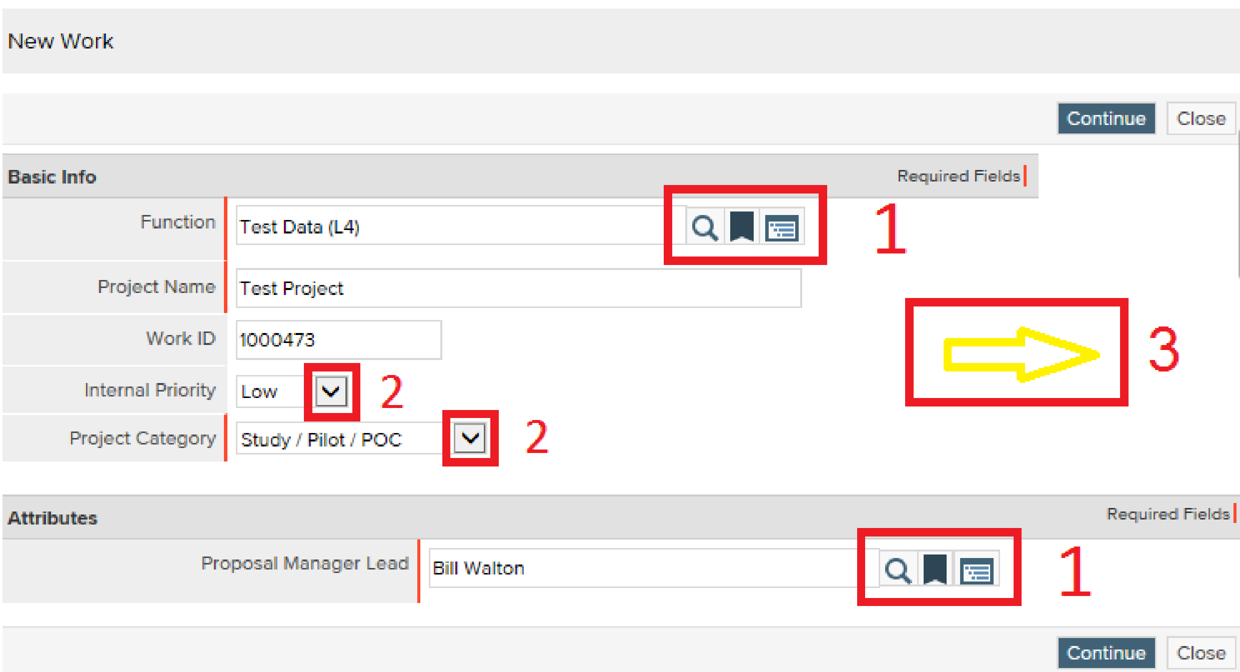


1.8. In Planview the grouped icons to the right of some data selection fields (**1**) launch (from left to right) text search functionality, a list of bookmarks and recent selections from which to choose, and the data picker functionality. The data picker displays a directory of personnel and/or assignable resources with the appropriate Planview role assignments in cascading dropdown list form. See figure PVD7.

1.9. The down caret often mentioned in this document is the downward-facing chevron (**2**) next to some Planview data selection fields. When clicked these carets reveal drop-down lists of selectable options. See figure PVD7.

1.10. The Planview screen shots with hollow yellow arrows (**3**) have been horizontally and/or vertically compressed in the screen captures to aid readability. The actual screens are either wider, taller, or both. See figure PVD7.

Figure PVD7. Data picker icons, down caret, and screen alteration arrow (horizontally compressed screen capture. The actual Planview screen is wider).



1.11. In data entry and selection dialog boxes, required data entry fields are indicated by a red vertical line (rule line) next to them. Another graphical reminder of this appears at the upper right of many screens where data entry fields in which required information must be entered appear. See figure PV1 (above).

1.12. Data entry dialog boxes that are required data entry fields with no known values must be populated with a (zero [0]).

1.13. Do not enter decimals in currency data entry dialog boxes. Round up instead. Example: Round $43.51 up to $44.

1.14. All currency values must be converted to US Dollar values in currency data entry dialog boxes. The currency converter approved for use by Huntsman Corporation LLC personnel is located at https://www.xe.com/. It can be accessed from the Tools menu on The Hub.

1.15. Enter only whole numbers in currency data entry dialog boxes. Commas are not necessary when entering currency amounts- Planview will add them.

1.16. For data entry fields populated with dates, the calendar launch icon next to the data selection field can be used to open the calendar-based date selection tool to select dates. It is also possible to enter dates in these fields manually. If dates are entered without zeroes in front of single digit days or months Planview will correct them. Two-digit years will also be corrected to four-digit years.

1.17. If a workflow process step is left incomplete or data is entered erroneously or left unsaved the error triggers both an open Planview action item and an email message to the user.

1.18. All project documentation is to be uploaded to and maintained in the Hub Space for the project.

1.19. This document lists the Planview procedures in sequential order. It is important to understand that at several points during the Demand Intake workflow delays of several days, weeks, and even several months can occur between some of the workflow procedures- especially those later in the workflow.

1.20. A comprehensive glossary is available here.

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2. Document Conventions

2.1. This is a Section (or) Sub-section name

2.2. This is a data field (or) screen name

2.3. Click here when in a box

2.4. (Insert the variable [or] response here)

2.5. *NOTE: Notes look like this.*

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3. <u>Planview Login</u>

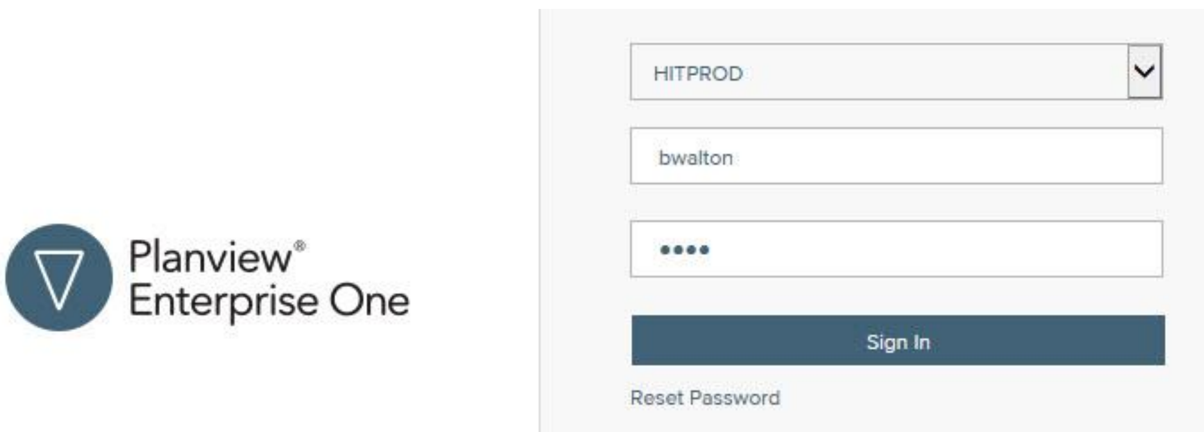
3.1. Login to Planview at https://huntsmanit.pvcloud.com/planview/login/body.asp using the username and password provided by the administrator.

NOTE: The user name is usually the first letter of the user's first name and the entire last name. Example: William Walton's login is wwalton (<u>not</u> case sensitive). When logging in for the first time the user is prompted to change his or her password. If the password has already been changed, use the new password.

3.2. Select HITPROD (the most current version of Planview) by clicking the down caret and clicking HITPROD from the listed options in the dropdown menu. If HITPROD is already displayed in the selection field no selection action is necessary. See figure PVD8.

*NOTE: HITPROD = **H**untsman **IT PROD**uction.*

Figure PVD8. HITPROD login screen.



3.3. Click Sign In to proceed.

3.4. The user's **My Overview- Planview Active Lifecycle Steps** page is displayed by default after logging in to Planview. On this page all projects in which the user is involved or owns Planview action items are displayed. See figure PVD9 (and) PVD10.

Figure PVD9. Planview Active Steps (full window screen capture).

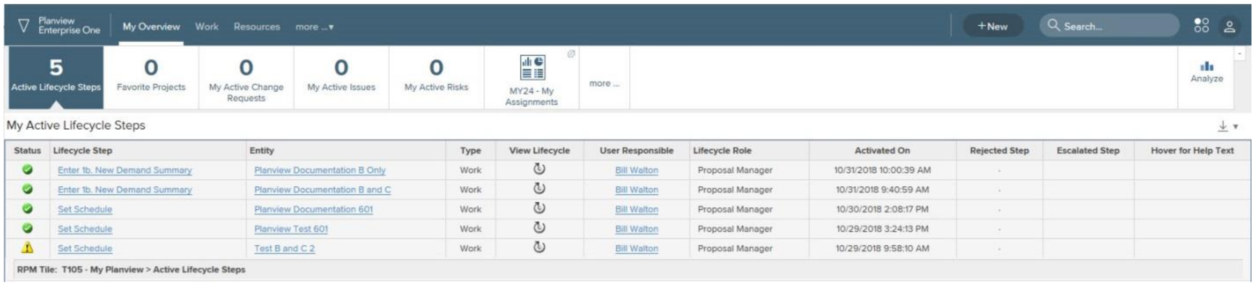
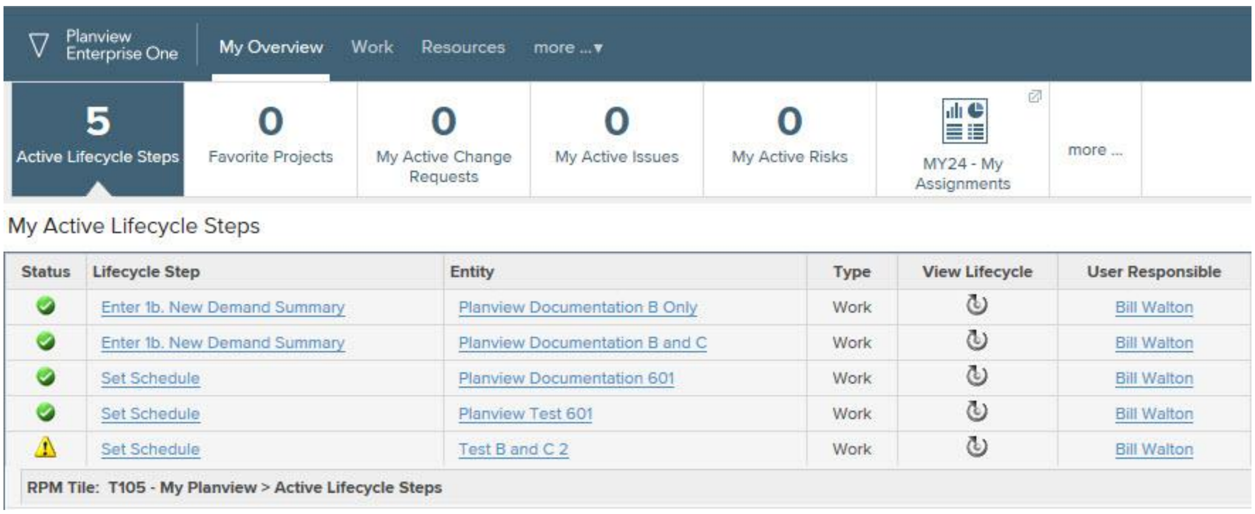


Figure PVD10. Planview Active Steps (partial expanded screen capture- the actual Planview screen is wider as in figure PVD9 above).



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4. Creating a Project in Planview

NOTE: Projects moving through the lifecycle from request to execution require initial schedule creation and maintenance, followed by Resource roles identification, and finally named Resource assignments.

NOTE: Updates to the work and resource schedule occur at key points in the project lifecycle and can also be made between stage gates:

Stage Gate A Schedule Creation and Resource Role assignment

Stage Gate B Schedule Update and Resource Role updates

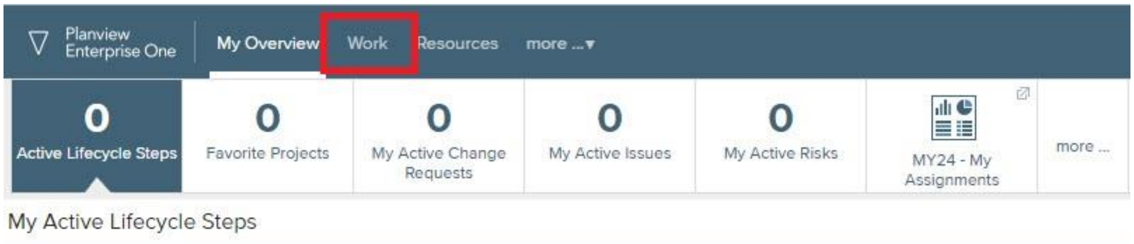
Stage Gate C Schedule Update and Named Resource assignments

Execution Phase Schedule effort updates

NOTE: The PMO will normally create the planned/budgeted project initially in Planview. However, if a project is unplanned or unbudgeted the Proposal Manager Lead will sometimes create the project in Planview.

4.1. Click on the Work tab (next to **My Overview** in the menu bar) at the top of the screen. See figure PVD11.

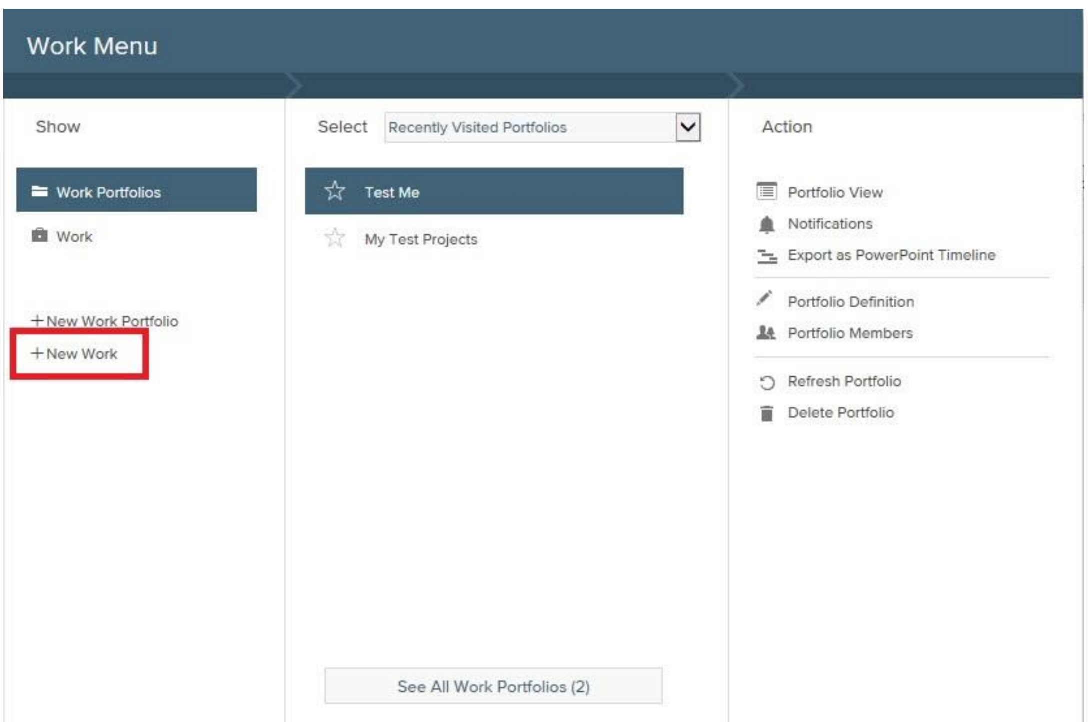
Figure PVD11. Work tab (partial screen capture- the actual Planview screen is wider).



4.2. The **Work Menu** is displayed.

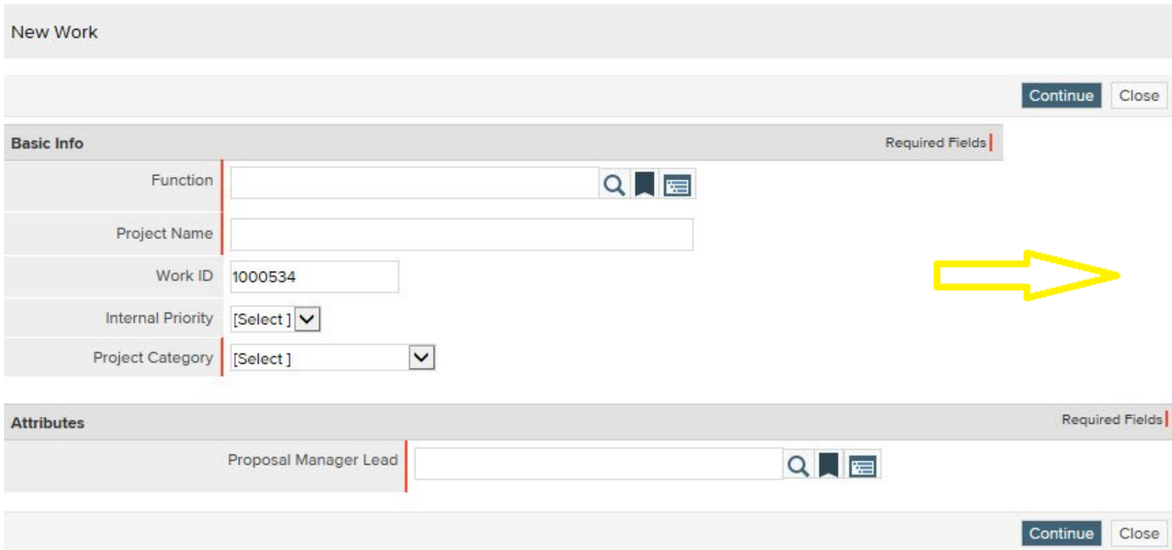
4.3. Under the **Work Portfolios** menu on the left side of the screen, click +New Work. See figure PVD12.

Figure PVD12. Work Menu.



4.4. The **New Work** screen is displayed. This screen specifies the basic information about the project being added. This screen is referred to as the system default screen (or) The Shell. See figure PVD13.

Figure PVD13. New Work (system default) screen (modified horizontally compressed screen capture- the actual Planview screen is wider).



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5. New Work

Request stage- Proposal Manager Leads

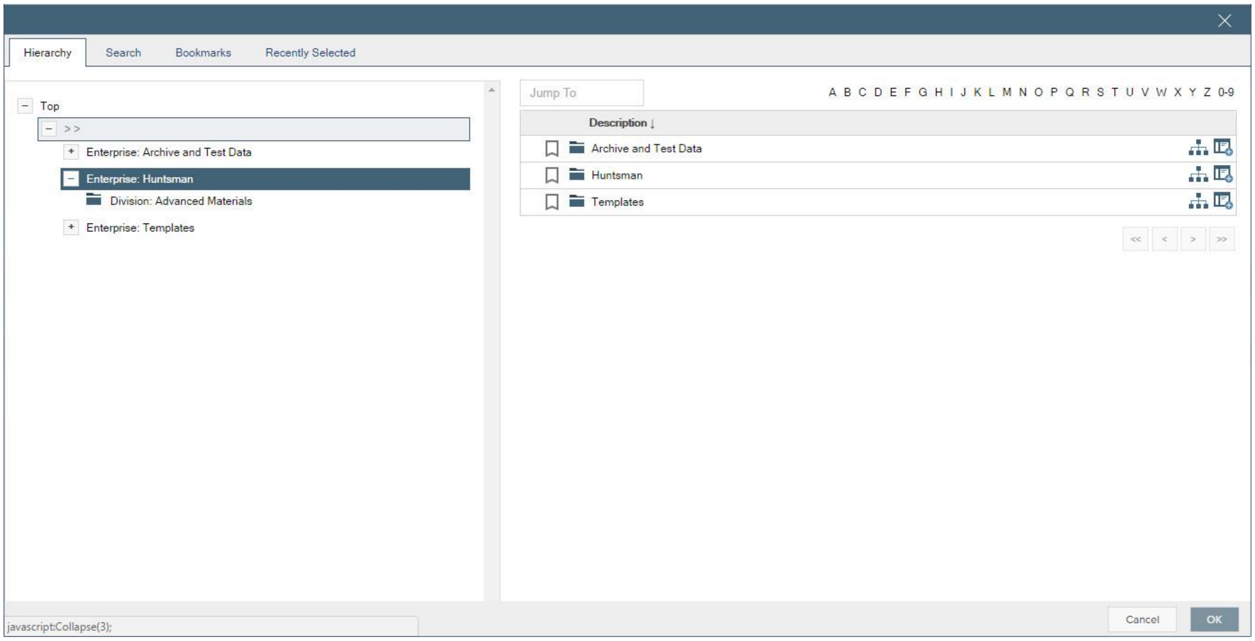
5.1. Basic Info

5.1.1. To enter data in the **Function** data field, click the data picker icon next to the **Function** data field to select the appropriate response.

5.1.2. The **Hierarchy** data picker screen is displayed.

5.1.3. On the left side of the **Hierarchy** data picker screen click on Enterprise: Huntsman from the cascading drop down list. See figure PVD14.

Figure PVD14. Hierarchy data picker screen with Enterprise: Huntsman selected.



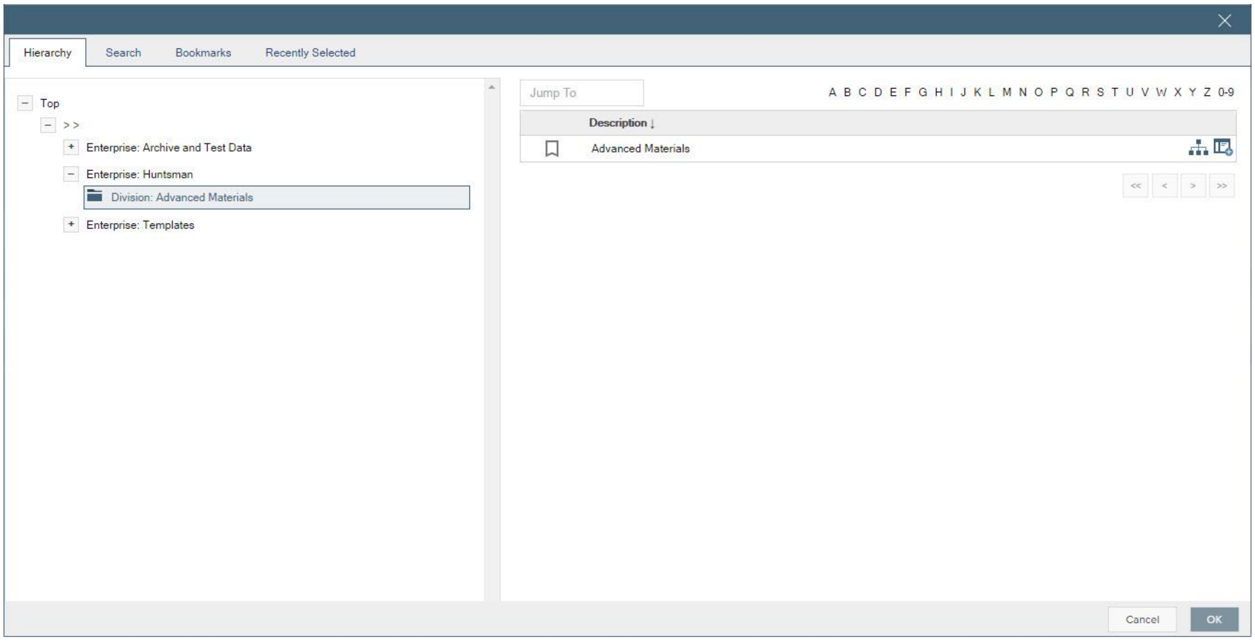
5.1.4. A cascading dropdown list of Huntsman Divisions is displayed in the **Hierarchy** data picker screen.

NOTE: The list displayed in the user account will differ from the screenshot above.

5.1.5. From the cascading drop down list under Enterprise: Huntsman, click on the appropriate Huntsman Division.

5.1.6. The Division selected is now displayed under the description subheading on the right side of the **Hierarchy** data picker screen. See figure PVD14.

Figure PVD14. Hierarchy data picker with Advanced Materials selected.



5.1.7. Click the radio button next to the desired **Function** (Division) in the column on the right to select it.

5.1.8. Click OK in the lower right portion of the **Hierarchy** data picker screen to save the data selected for **Function**.

5.1.9. After OK is clicked in the **Hierarchy** data picker screen the **New Work** screen is populated with the **Function** selection.

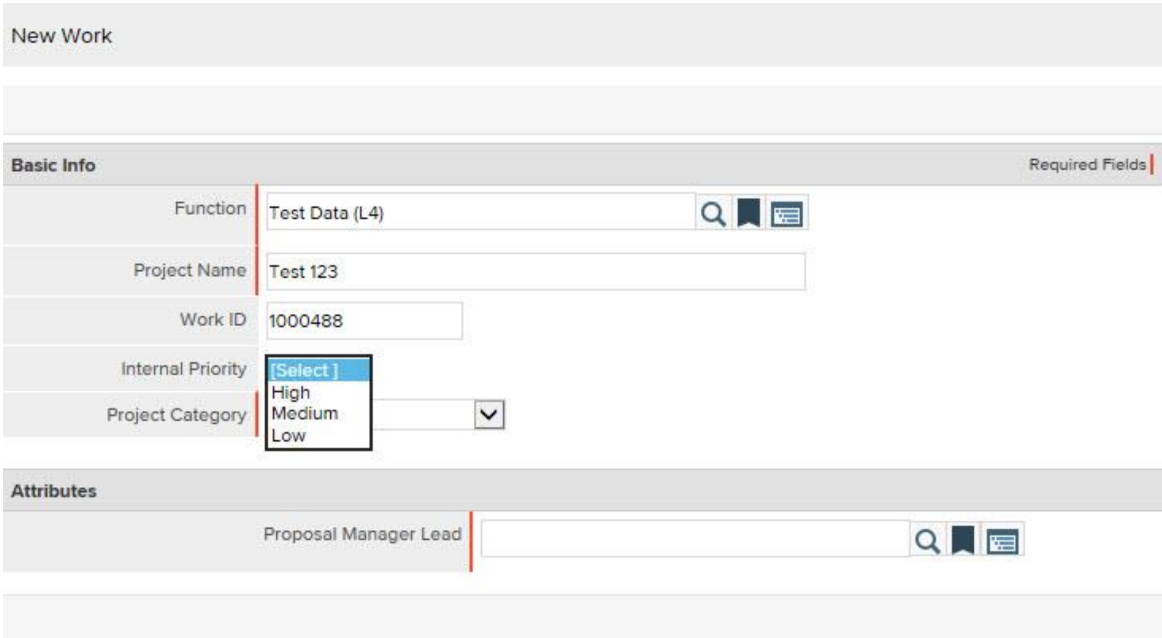
5.1.10. Click in the **Project Name** data entry field to enter (exactly the same project name data as indicated on the Demand Intake document).

NOTE: Only a single division can be selected for a project.

5.1.11. The **Work ID** field is prefilled.

5.1.12. Select an **Internal Priority** by clicking the down caret next to the **Internal Priority** data selection field and clicking (the appropriate response) from the listed options in the dropdown menu to select it. See figure PVD15.

Figure PVD15. Selecting internal priority with options shown.



5.1.13. Select a **Project Category** by clicking the down caret next to the **Project Category** data selection field and clicking (the appropriate project category) from the listed options in the dropdown menu to select it.

NOTE: Certain categories have different workflow processes. It is very important to select the correct project category.

Project- Should be executable project(s). This category will require Stage Gate A and C approvals. Stage Gate B can be bypassed if the project meets certain budgetary and scheduling considerations. A project will have a schedule timeline for the start of the project and the end of the project. A schedule and financial planning details will be required for Planview.

Study / Pilot / POC- Follows the same workflow as a regular Project requiring a set schedule and complete financial planning details.

License Only- No project execution. No schedule is required as license and/or software purchases do not (usually) require any human capital resources. Requires drastically reduced (or no) effort-based workflow procedures but a financial planning detail is required.

Maintenance – Servicing- These projects have already gone through to execution but still have maintenance or servicing fees for which to pay. Requires drastically reduced (or no) effort-based workflow procedures but a financial planning detail is required.

Facilities- Used for Portfolio tracking only by the PMO.

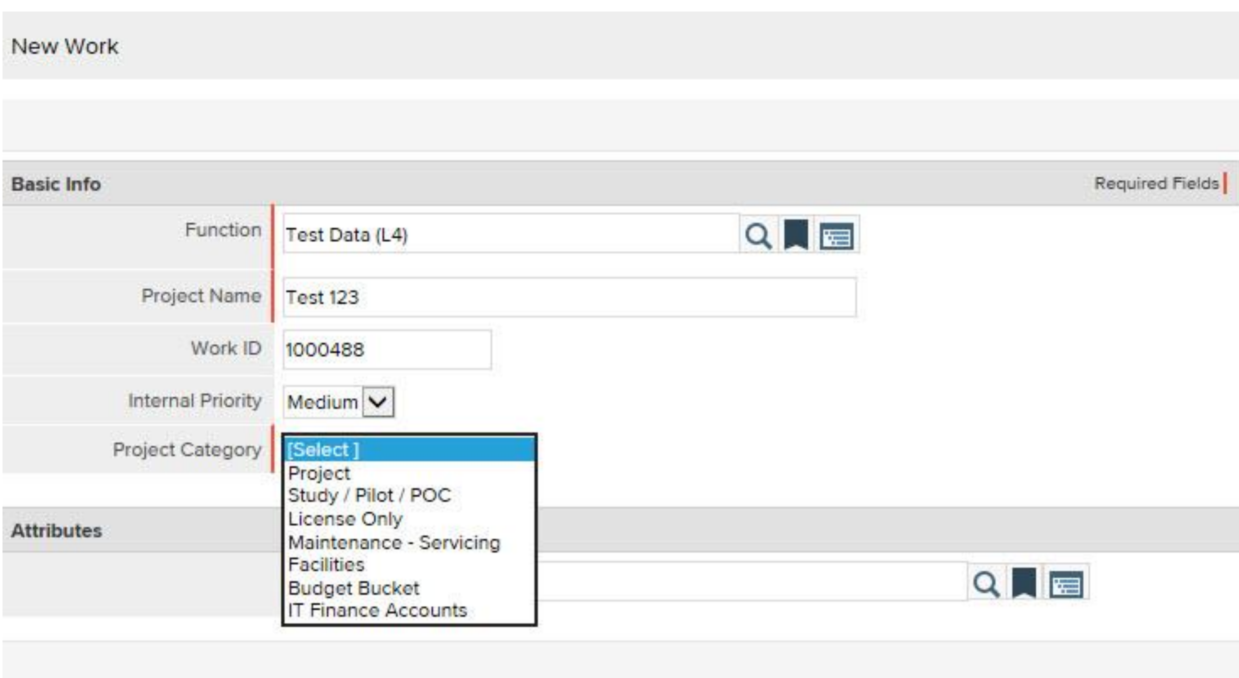
Budget Bucket- Used to hold funds for regulatory and compliance projects only by the PMO.

IT Finance Accounts- Used to store any values for projects that are no longer in the current reporting portfolio (or) for unidentified actuals only by the PMO. See figure PVD16.

NOTE: The project category selection determines Planview workflow differences. If the project is not a full project, scheduling and resource selection procedures during the workflow are altered depending on the project category.

NOTE: The project category will also be required for the New Demand screen just downstream in Planview. Ensure the project category selections match on both screens.

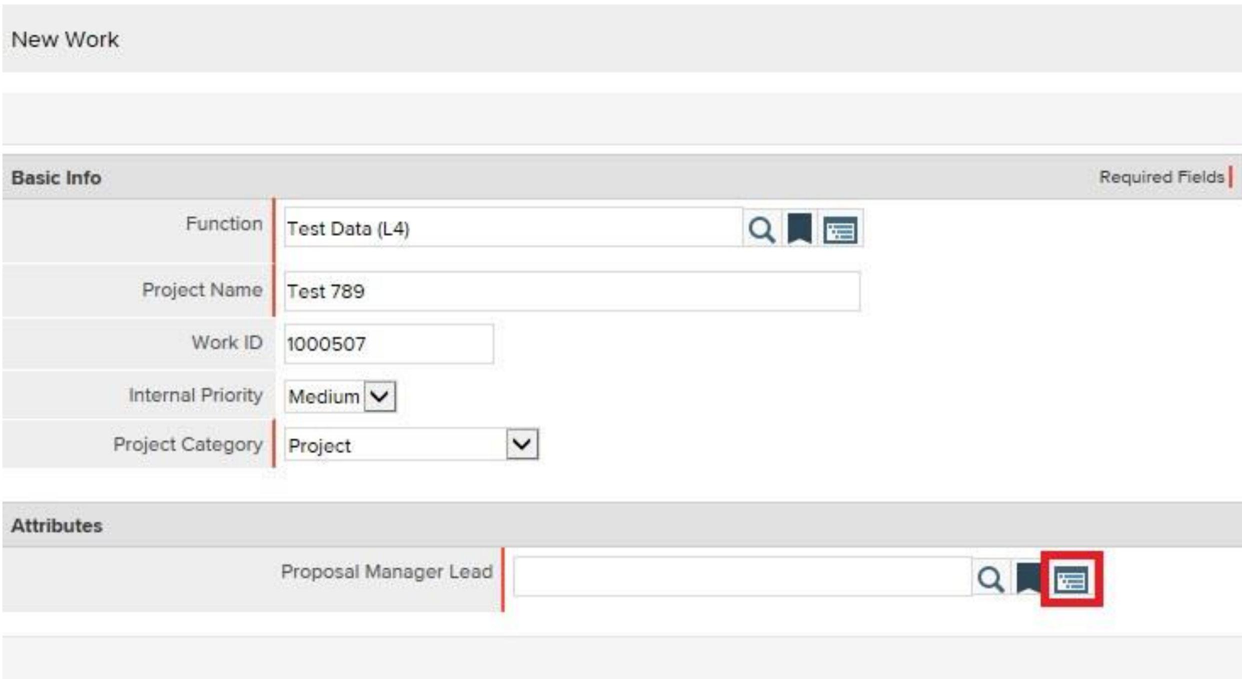
Figure PVD16. Project Category selection options.



5.2. Attributes

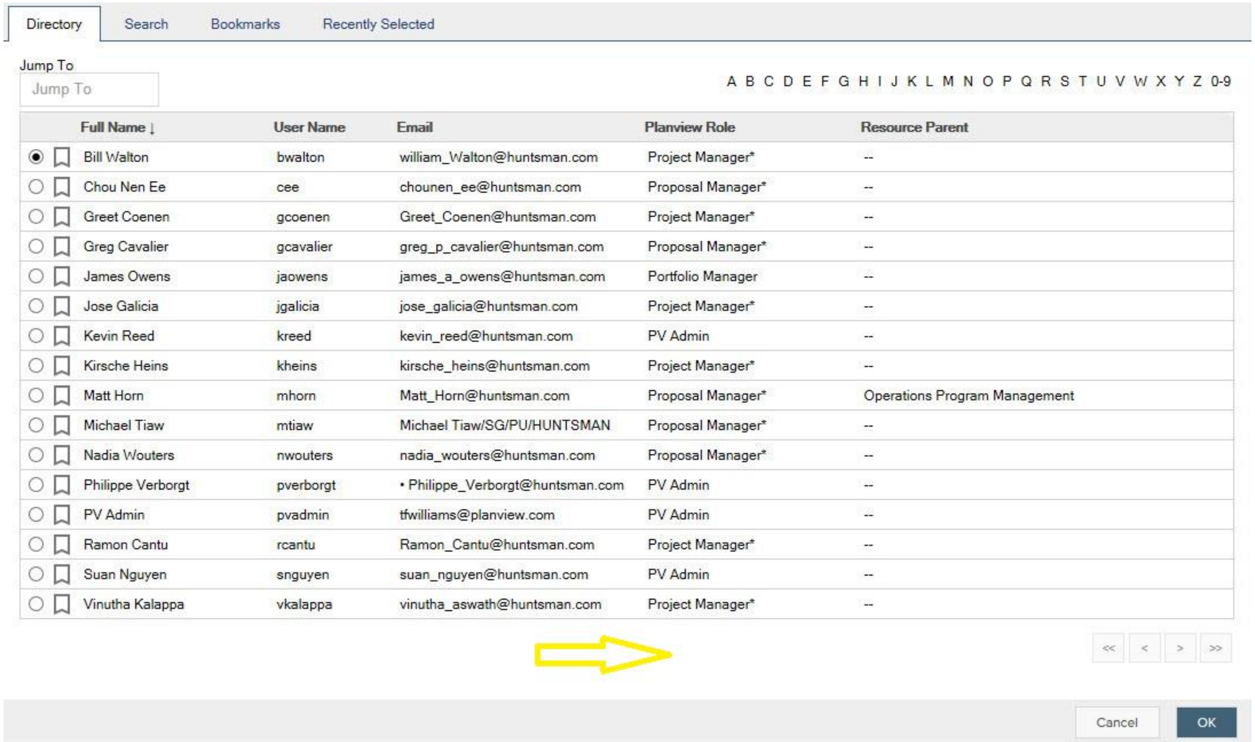
5.2.1. To select a response for the **Proposal Manager Lead** data field, click the data picker icon next to the **Proposal Manager Lead** data field to display a **Directory** data picker screen with a list of personnel with that role in Planview. See figure PVD17.

Figure PVD17. Proposal Manager Lead with data picker icon in red.



5.2.2. Click the radio button to the left of the name of (the appropriate Proposal Manager Lead) to select him or her from the displayed **Directory** list in the data picker screen. See figure PVD18.

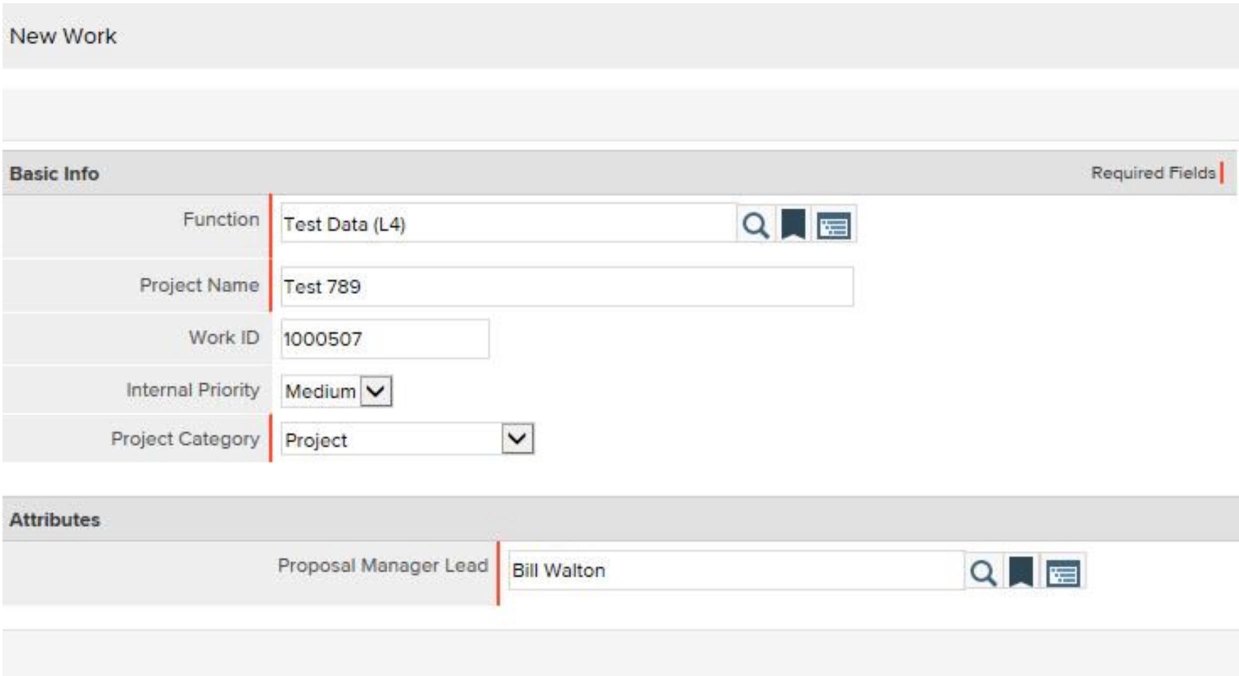
Figure PVD18. Proposal Manager Lead data picker screen. (modified horizontally compressed screen capture- the actual Planview screen is wider).



5.2.3. After the appropriate **Proposal Manager Lead** is selected, click OK in the lower right portion of the **Directory** data picker screen.

5.2.4. After OK is clicked in the **Directory** data picker screen, the **New Work** screen is populated with the **Proposal Manager Lead** data field selection. See figure PVD19.

Figure PVD19. Proposal Manager Lead completed (partial screen capture).

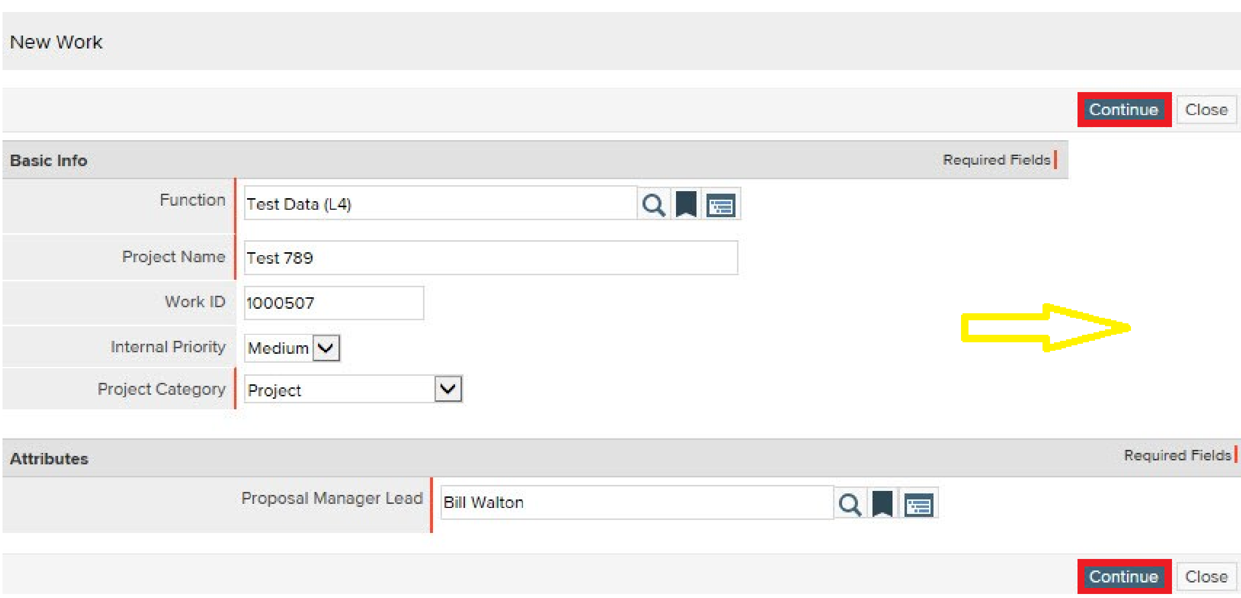


5.2.5. Verify that the information displayed in the **New Work** screen is correct.

5.2.6. Click Continue on the right side of the **New Work** screen. See figure PVD20.

NOTE: The user can click either of the two displayed Continue *buttons.*

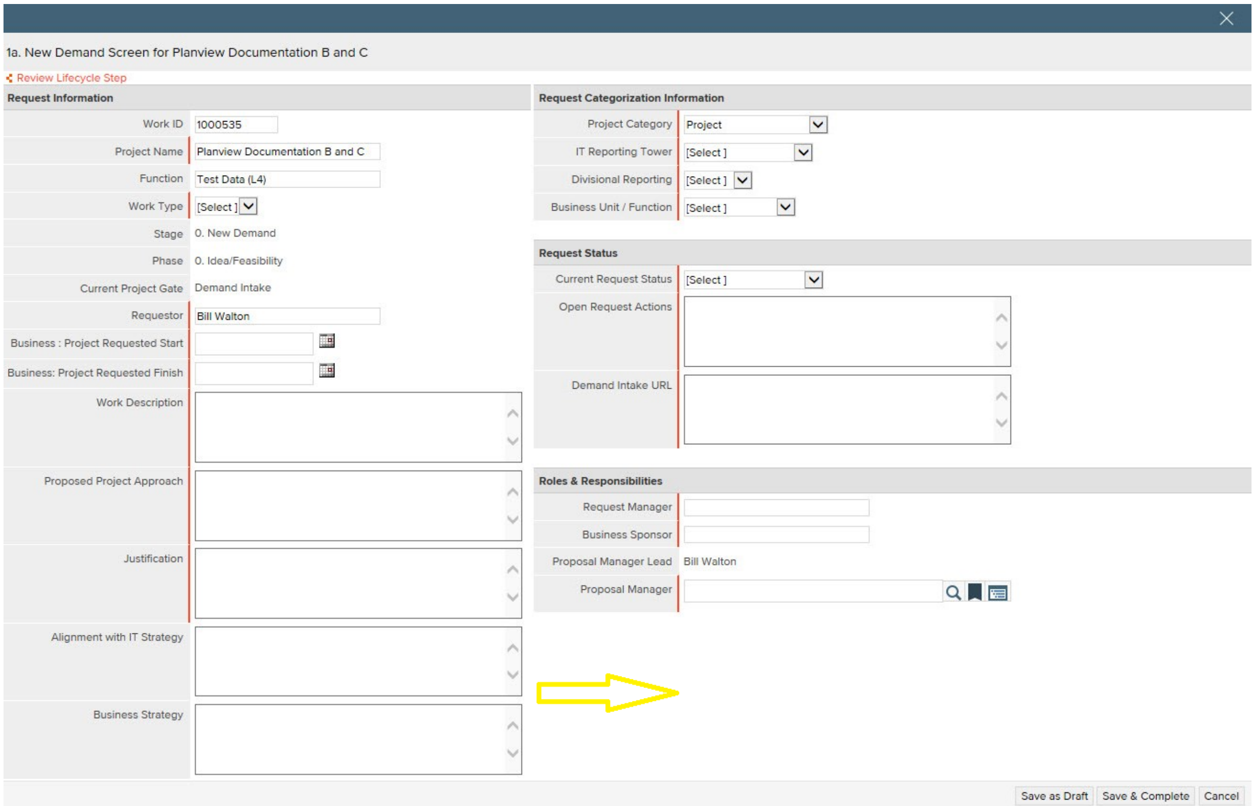
Figure PVD20. Continue (horizontally compressed screen capture- the actual Planview screen is wider).



5.2.7. After Continue is clicked in the **New Work** screen the **New Demand** screen is displayed. See figure PVD21.

NOTE: The Proposal Manager Lead is responsible for Demand Intake screen completion.

Figure PVD21. New Demand screen (modified horizontally compressed screen capture- the actual Planview screen is wider).



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6. New Demand

Request stage- Proposal Manager Leads

6.1. Request Information

6.1.1. The **Work ID** field is prefilled.

6.1.2. The **Project Name** field is prefilled.

6.1.3. The **Function** field is prefilled.

6.1.4. Select **Work Type** by clicking the down caret next to the **Work Type** data selection field and clicking (the appropriate work type) from the listed options in the dropdown menu to select it.

NOTE: A New Demand is assigned a Work Type based on four criteria: Cost/Effort, scope & complexity, importance, and technology risk. The Work Type also determines the required documentation. Work Types can change as more information becomes available during the development life cycle. Refer to table PVD2 for work type selection criteria.

Table PVD2. Work type criteria.

Work Type	Project Type	Efforts	Complexity	Importance	Risk
1	Enterprise or Large project	>$US 1M **OR** >2,000 man days.	Any project that impacts multiple divisions and/or functions, introduces multiple new complex processes or makes major changes to existing ones, or impacts a single business unit across all regions	Any project making strategic business changes and is strategically important to the entire business or to an entire business unit.	High risk projects introducing new or unproven technology and/or with limited definition of the solution, new technology with no internal expertise, or very high change management, or very high business compliance, regulatory, or security risk.
2	Medium project	>$US 200K and <$US 1M **OR** >200 man days and <2,000 man days.	Any project that impacts several plants or locations, is of medium scope or complexity, or only affects part of the end-to-end business process.	Any project strategically important to one or more key business units or functions, departments, or sites.	Medium risk projects with complex but known technology introduction, or medium change management, or medium business compliance, regulatory, or security risk.
3	Small Project	>$US 10K and <$US 200K **OR** >20 man days and <200 man days.	Any project that impacts a single plant for a single business unit or a small portion of a single end to-end business process.	Any tactically important project.	Low risk projects introducing fully proven technology, existing internal expertise with clear outcome definition, low change management, or low business compliance, regulatory, or security risk.

NOTE: There is no exact formula for Work Type, as a project may be in different work types depending on the area, it is therefore the proposal manager who sets the initial work type.

If major changes occur during the project lifecycle, the Work Type may be revised and the governance process adapted accordingly.

The proposal manager sets the initial Work Type categorization when bringing the new project idea to the Demand intake.

PMO revises the proposed Work Type categorization and if needed brings it to the governance forum if deemed necessary.

6.1.5. The **Stage** field is prefilled and changes as the project lifecycle progresses.

6.1.6. The **Phase** field is prefilled and changes as the project lifecycle progresses.

6.1.7. The **Current Project Gate** field is prefilled and changes as the project lifecycle progresses.

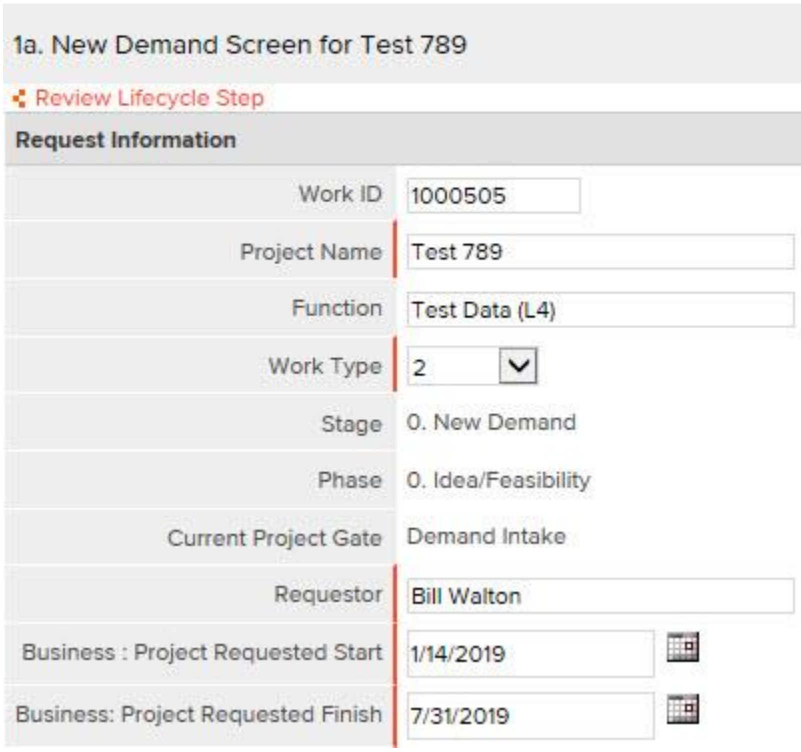
6.1.8. The **Requestor** field is prefilled.

6.1.9. Select the **Business : Project Requested Start** date by clicking the calendar launch icon next to the **Business : Project Requested Start** data selection field and selecting (the date on which the Business requested that the project start).

6.1.10. Select the **Business : Project Requested Finish** date by clicking the calendar launch icon next to the **Business : Project Requested Finish** data selection field and selecting (the date on which the Business requested that the project be completed). See figure PVD22.

NOTE: These are the start and finish dates requested by the business. The actual dates are determined after review of multiple factors later in the work flow.

Figure PVD22. Request Information part one completed.



1a. New Demand Screen for Test 789

Review Lifecycle Step

Request Information

Work ID	1000505
Project Name	Test 789
Function	Test Data (L4)
Work Type	2
Stage	0. New Demand
Phase	0. Idea/Feasibility
Current Project Gate	Demand Intake
Requestor	Bill Walton
Business : Project Requested Start	1/14/2019
Business: Project Requested Finish	7/31/2019

6.1.11. Click in the **Work Description** data entry field to paste the information previously entered in section 2 of the Demand Intake form. New or additional information can be entered but the Demand Intake form should also be updated if new or additional information is entered here.

6.1.12. Click in the **Proposed Project Approach** data entry field to paste the information previously entered in section 6 of the Demand Intake form. New or additional information can be entered but the Demand Intake form should also be updated if new information is entered here.

6.1.13. Click in the **Justification** data entry field to paste the information previously entered in section 4 of the Demand Intake form. New or additional information can be entered but the Demand Intake form should also be updated if new information is entered here.

6.1.14. Click in the **Alignment with IT Strategy** data entry field to paste the information previously entered in section 5 of the Demand Intake form. New or additional information can be entered but the Demand Intake form should also be updated if new information is entered here.

6.1.15. Click in the **Business Strategy** data entry field to paste the information previously entered in section 6 of the Demand Intake form. New or additional information can be entered but the Demand Intake form should also be updated if new information is entered here. See figure PVD23.

Figure PVD23. Request Information part two completed.

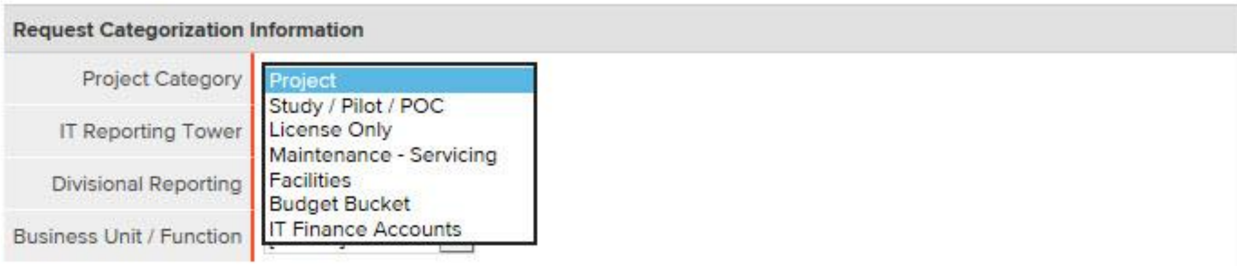
Work Description	Section 2 from Demand Intake form plus any new or additional descriptive information. Be sure to update the Demand Intake form with the new or additional information.
Proposed Project Approach	Section 6 from Demand Intake form plus any new or additional approach information. Be sure to update the Demand Intake form with the new or additional information.
Justification	Section 4 from Demand Intake form plus any new or additional justification information. Be sure to update the Demand Intake form with the new or additional information.
Alignment with IT Strategy	Section 5 from Demand Intake form plus any new or additional IT strategy information. Be sure to update the Demand Intake form with the new or additional information.
Business Strategy	Sections 7 and 8 from Demand Intake form plus any new or additional strategy information. Be sure to update the Demand Intake form with the new or additional information.

6.2. Request Categorization Information

6.2.1. Select a **Project Category** by clicking the down caret next to the **Project Category** data selection field and clicking (*the same project category previously selected on the New Work screen*) from the listed options in the dropdown menu to select it. See figure PVD24.

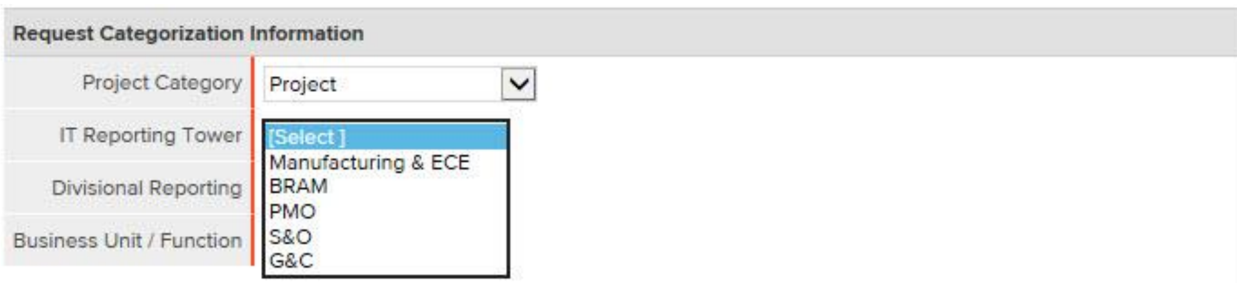
NOTE: Proposal Manager leads will usually select either Project (or) Study / Pilot / POC for the Project Category response.

Figure PVD24. Project Category selection options (partial screen capture only).



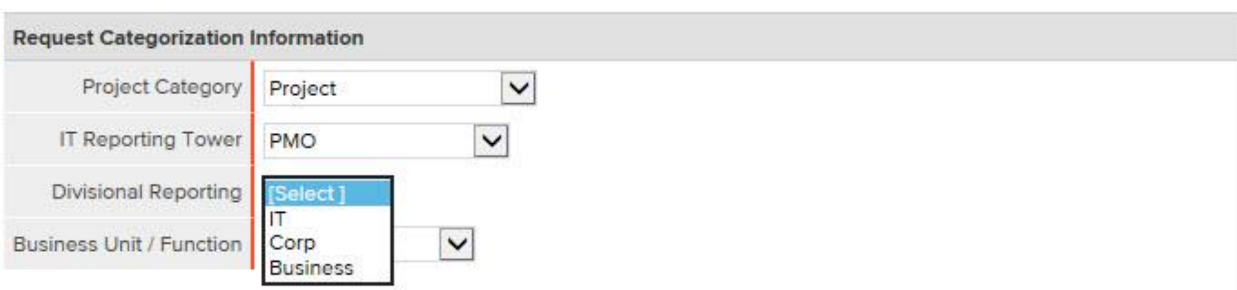
6.2.2. Select an **IT Reporting Tower** response by clicking the down caret next to the **IT Reporting Tower** data selection field and clicking (the IT reporting tower response) from the listed options in the dropdown menu to select it. See figure PVD25.

Figure PVD25. IT Reporting Tower selection options (partial screen capture only).



6.2.3. Select a **Divisional Reporting** response by clicking the down caret next to the **Divisional Reporting** data selection field and clicking (the divisional reporting response) from the listed options in the dropdown menu to select it. See figure PVD26.

Figure PVD26. Divisional Reporting selection options (partial screen capture only).



6.2.4. Select a **Business Unit / Function** response by clicking the down caret next to the **Business Unit / Function** data selection field and clicking (the business unit/function response [the business sponsor of the project]) from the listed options in the dropdown menu to select it. See figure PVD27.

Figure PVD27. Business Unit / Function selection options (partial screen capture only).

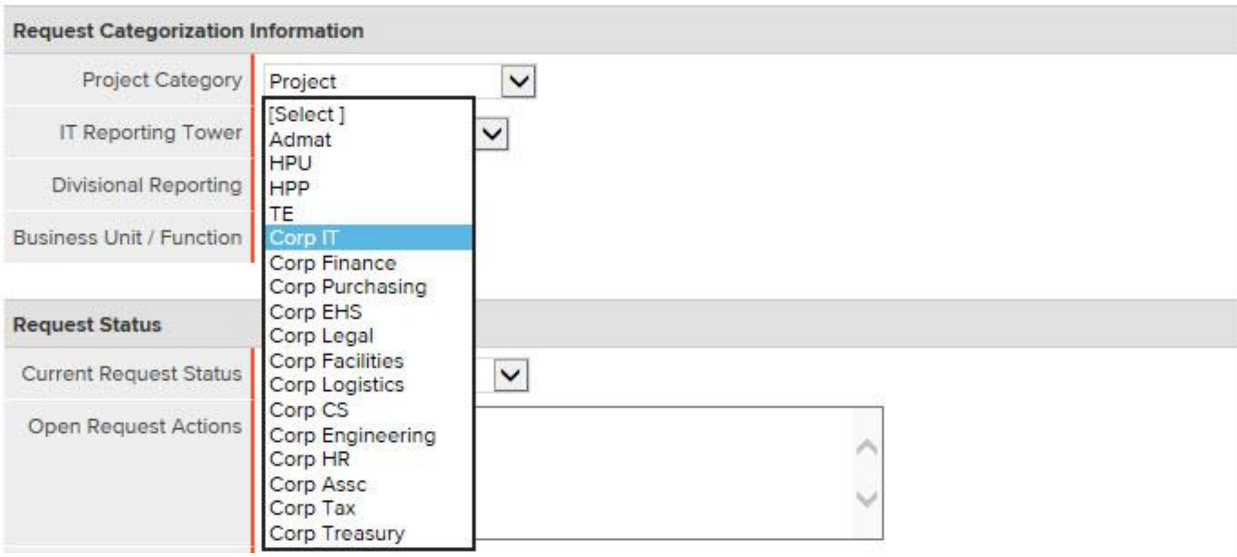


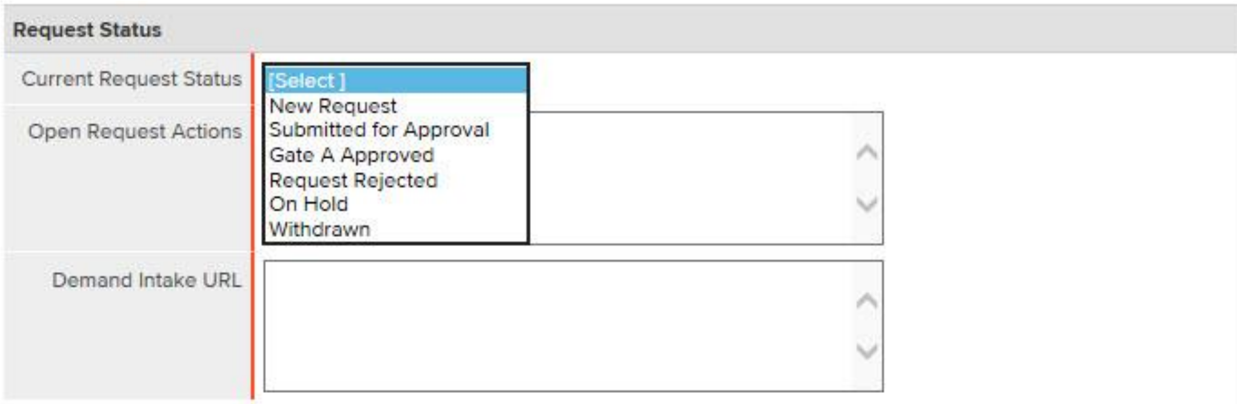
Figure PVD28. Request Categorization Information completed.

6.3. Request Status

6.3.1. Select a **Current Request Status** response by clicking the down caret next to the **Current Request Status** data selection field and clicking (<u>the current status of the request</u>) from the options listed in the dropdown menu to select it. See figure PVD29.

NOTE: This field requires updating as the demand request workflow progresses.

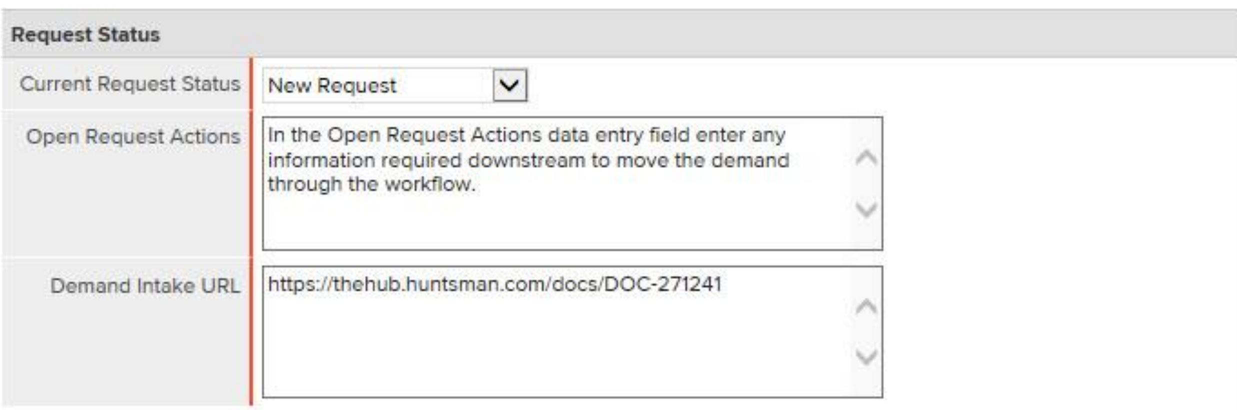
Figure PVD29. Current Request Status selection options (partial screen capture only).



6.3.2. Click in the **Open Request Actions** data entry field to enter (any information required by downstream users [roles] to move the demand through the workflow).

6.3.3. Click in the **Demand Intake URL** data entry field to paste (the URL to the location of the completed Demand Intake form for the project on The Hub). See figure PVD30.

Figure PVD30. Request Status completed (partial screen capture only).



6.4. Roles & Responsibilities

6.4.1. Click in the **Request Manager** data entry field to enter (the name of the Request Manager).

6.4.2. Click in the **Business Sponsor** data entry field to enter (the name of the Business Sponsor).

6.4.3. The **Proposal Manager Lead** field is prefilled.

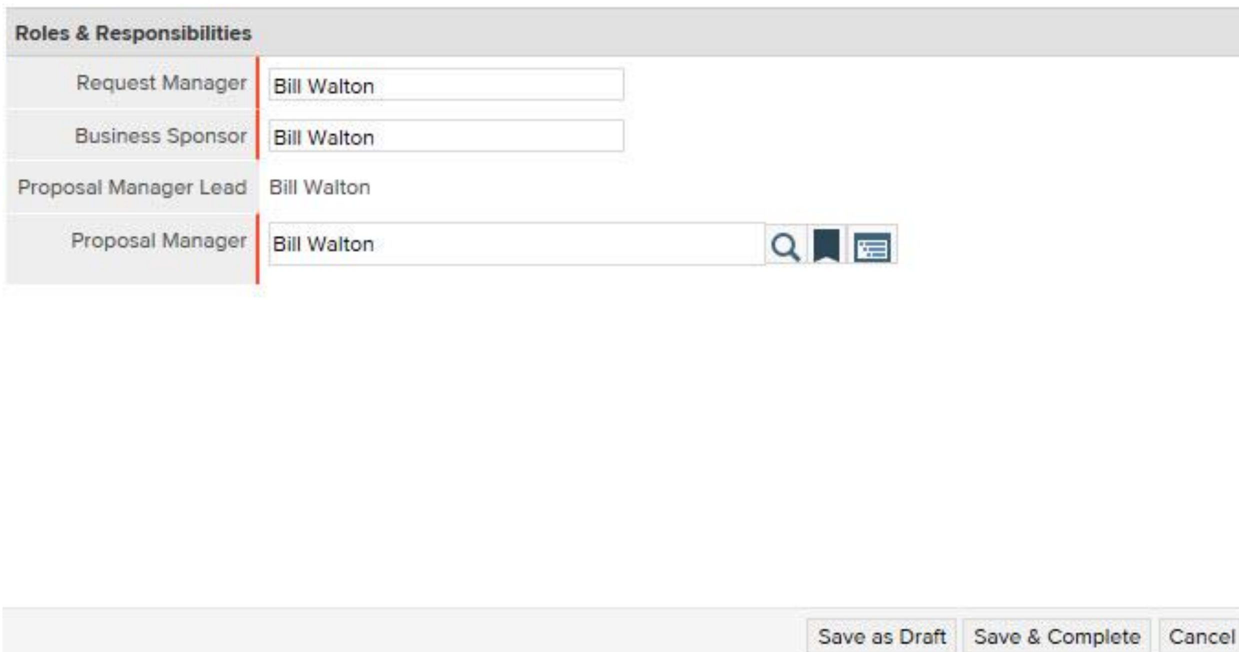
6.4.4. To select a response for the **Proposal Manager** data selection field, click the data picker icon next to the **Proposal Manager** data field to display a **Directory** data picker list of personnel with that role in Planview.

6.4.5. Click the radio button to the left of the name of (the appropriate Proposal Manager) to select him or her from the displayed list in the **Directory** data picker screen.

6.4.6. After the appropriate **Proposal Manager** is selected, click $\boxed{\text{OK}}$ in the lower right portion of the **Directory** data picker screen.

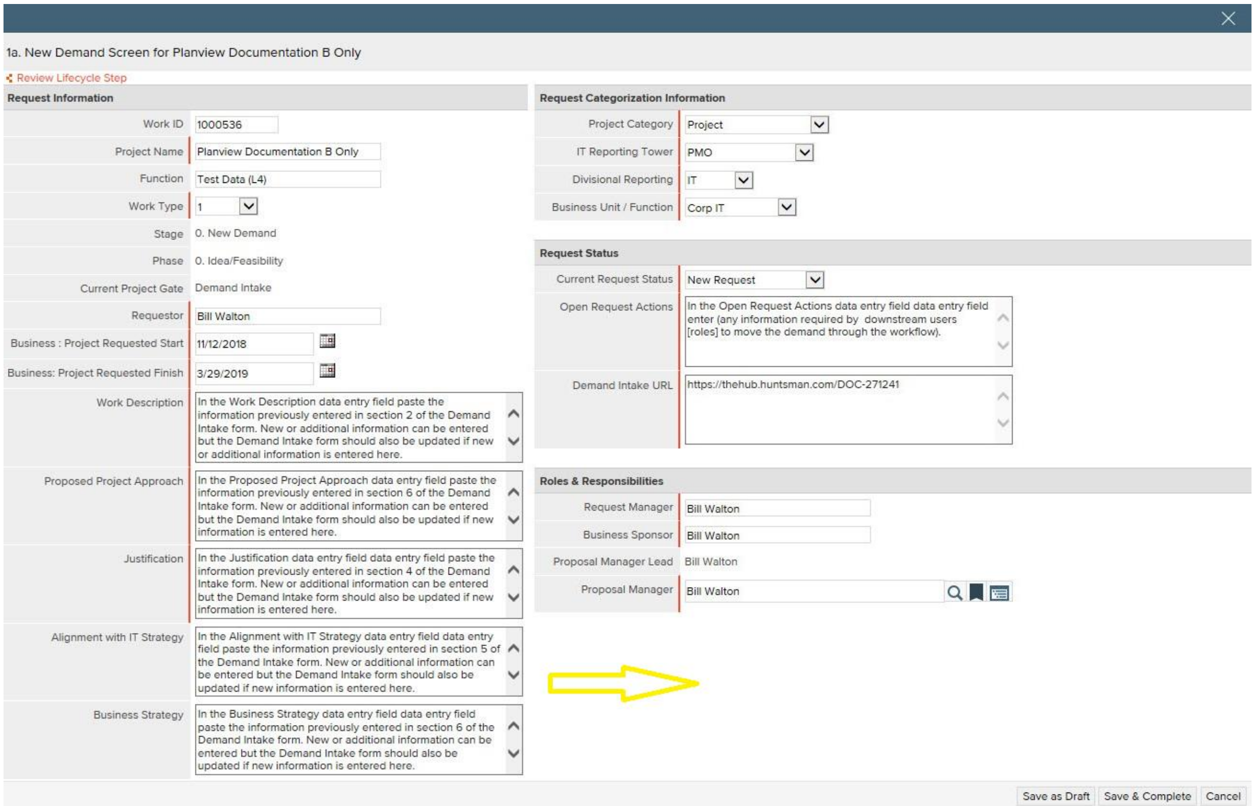
6.4.7. After $\boxed{\text{OK}}$ is clicked in the **Directory** data picker screen, the **New Demand** screen is populated with the **Proposal Manager** selection. See figure PVD31.

Figure PVD31. Roles & Responsibilities completed.



6.4.8. Verify that the data entered and selections made in the **New Demand** screen are complete and correct. See figure PVD32.

Figure PVD32. New Demand screen completed (modified horizontally compressed screen capture- the actual Planview screen is wider).



6.4.9. Once verification is complete click Save & Complete in the lower right portion of the **New Demand** screen.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel.

6.4.10. After Save & Complete is clicked in the **New Demand** screen the **New Demand Summary** screen is displayed with **Project Manager** and **PMO Admin** data selection fields now displayed under **Roles & Responsibilities**. See figure PVD33.

Figure PVD33. New Demand Summary- Roles & Responsibilities (this section only- with all roles displayed but not selected).

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7. New Demand Summary

Request stage- Proposal Manager Leads

7.1. Roles & Responsibilities

7.1.1 The **Request Manager** field is prefilled.

7.1.2 The **Business Sponsor** field is prefilled.

7.1.3 The **Proposal Manager** field is prefilled.

7.1.4 To select a response for the **Project Manager** data field, click the data picker icon next to the **Project Manager** data selection field to display a **Directory** data picker list of personnel with that role in Planview.

7.1.5 Click the radio button to the left of the name of (the appropriate Project Manager) to select him or her from the displayed list in the **Directory** data picker screen.

7.1.6 After the appropriate **Project Manager** is selected, click OK in the lower right portion of the **Directory** data picker screen.

7.1.7 After OK is clicked in the **Directory** data picker screen, the **New Demand Summary** screen is populated with the **Project Manager** selection.

7.1.8 The **Proposal Manager Lead** field is prefilled.

7.1.9 To select a response for the **PMO Admin** data field, click the data picker icon next to the **PMO Admin** data selection field to display a **Directory** data picker list of personnel with that role in Planview.

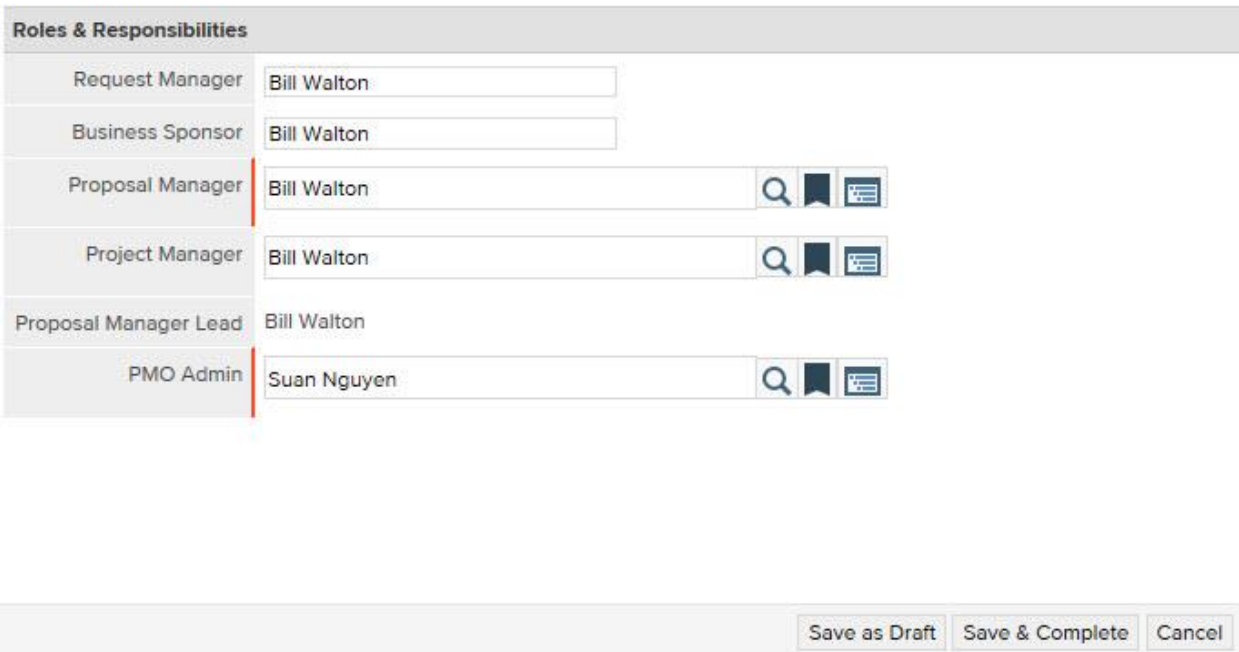
7.1.10 Click the radio button to the left of the name of (the appropriate PMO Admin) to select him or her from the displayed list in the **Directory** data picker screen.

7.1.11 After the appropriate **PMO Admin** is selected, click OK in the lower right portion of the **Directory** data picker screen.

NOTE: The PMO Admin is usually either Kevin Reed (or) Suan Nguyen.

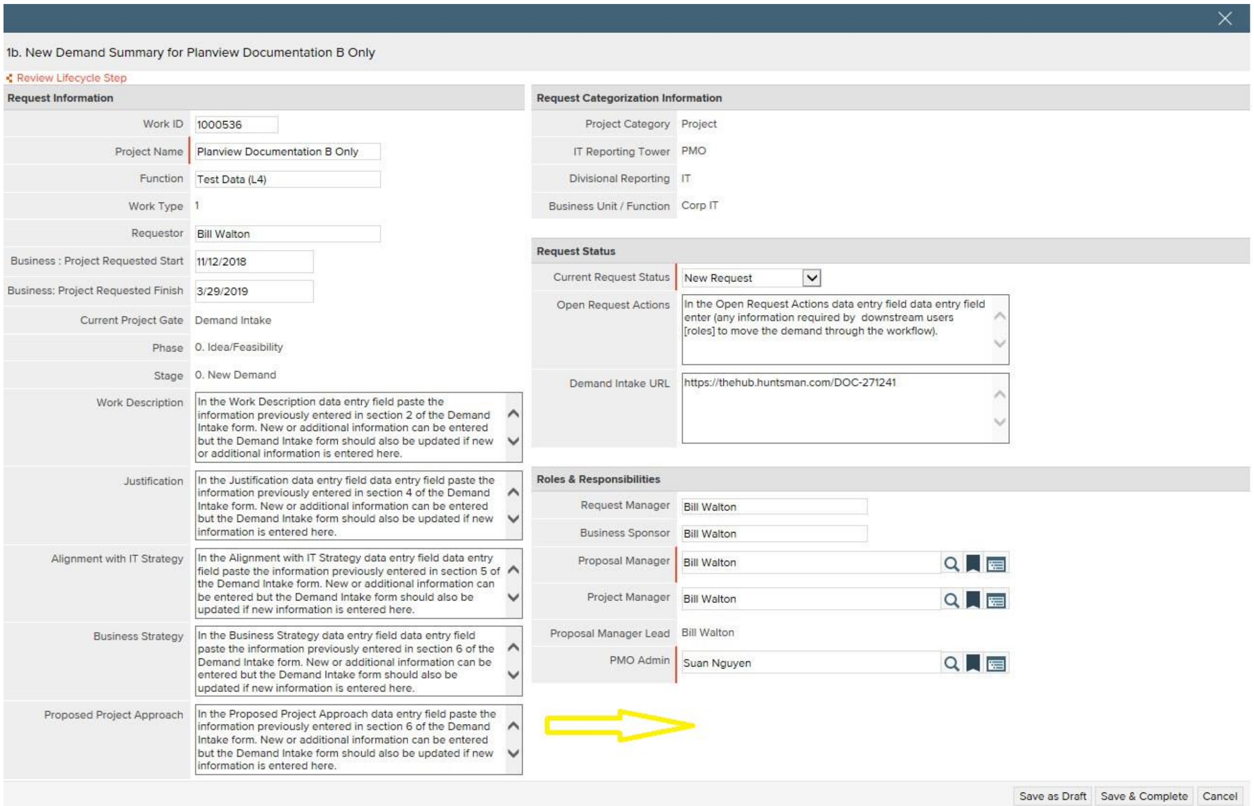
7.1.12 After OK is clicked in the **Directory** data picker screen, the **New Demand Summary** screen is populated with the **PMO Admin** selection. See Figure PVD34.

Figure PVD34. New Demand Summary- Roles & Responsibilities (this section only- completed).



7.1.13. Verify that all information displayed in the **New Demand Summary** screen is correct and complete. See figure PVD35.

Figure PVD35. Completed Demand Intake screen (modified horizontally compressed screen capture- the actual Planview screen is wider).



7.1.14. Once verification is complete click Save & Complete in the lower right portion of the **1b. New Demand Summary** screen.

NOTE: If for some reason the user is not prepared to continue beyond this point the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel*.*

7.1.15. After Save & Complete in the **New Demand Summary** screen is clicked, the **Create Schedule** screen is displayed.

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8. Create Schedule

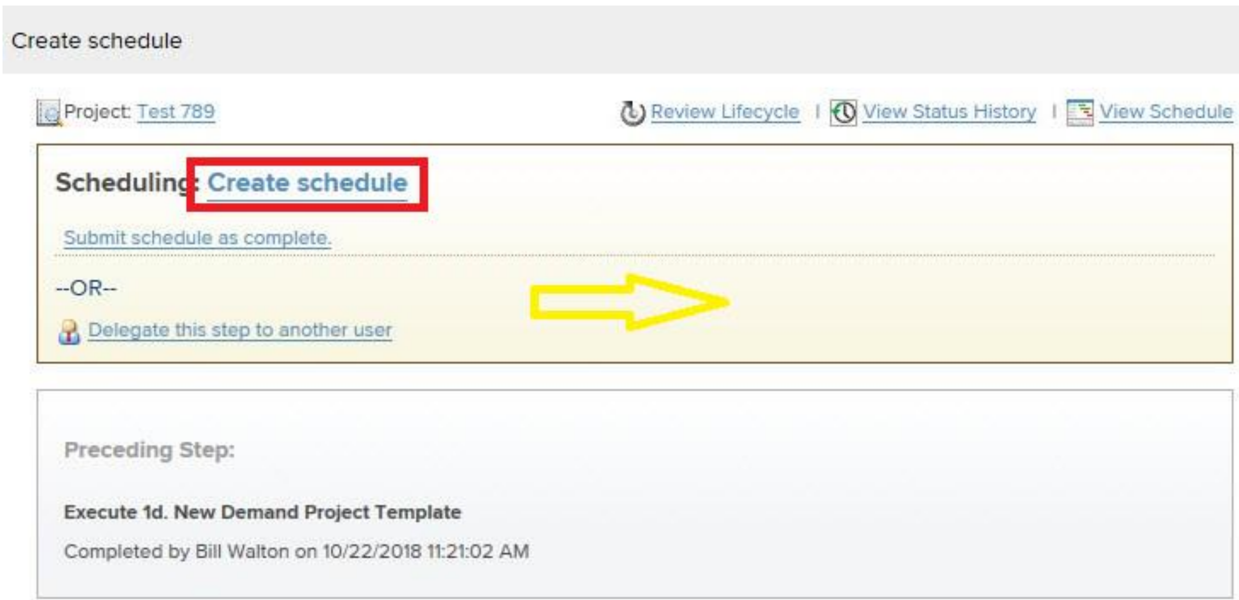
Request stage- Proposal Managers

https://success.planview.com/Planview_Enterprise_One/Portfolio_and_Resource_Management/30Project_and_Work_Management

NOTE: The Proposal Manager is responsible for the baseline schedule/resources and financials and enters both in Planview.

8.1. Click the Create Schedule hyperlink next to **Scheduling:** See figure PVD36.

Figure PVD36. Scheduling: Create schedule (modified horizontally compressed screen capture- the actual Planview screen is wider).



8.2. After the Create Schedule hyperlink is clicked in the **Scheduling: Create Schedule** screen the **Work and Resource Management** screen is displayed. See figures PVD37 and PVD38.

Figure PVD37. Work and Resource Management screen (modified horizontally compressed screen capture- the actual Planview screen is wider).

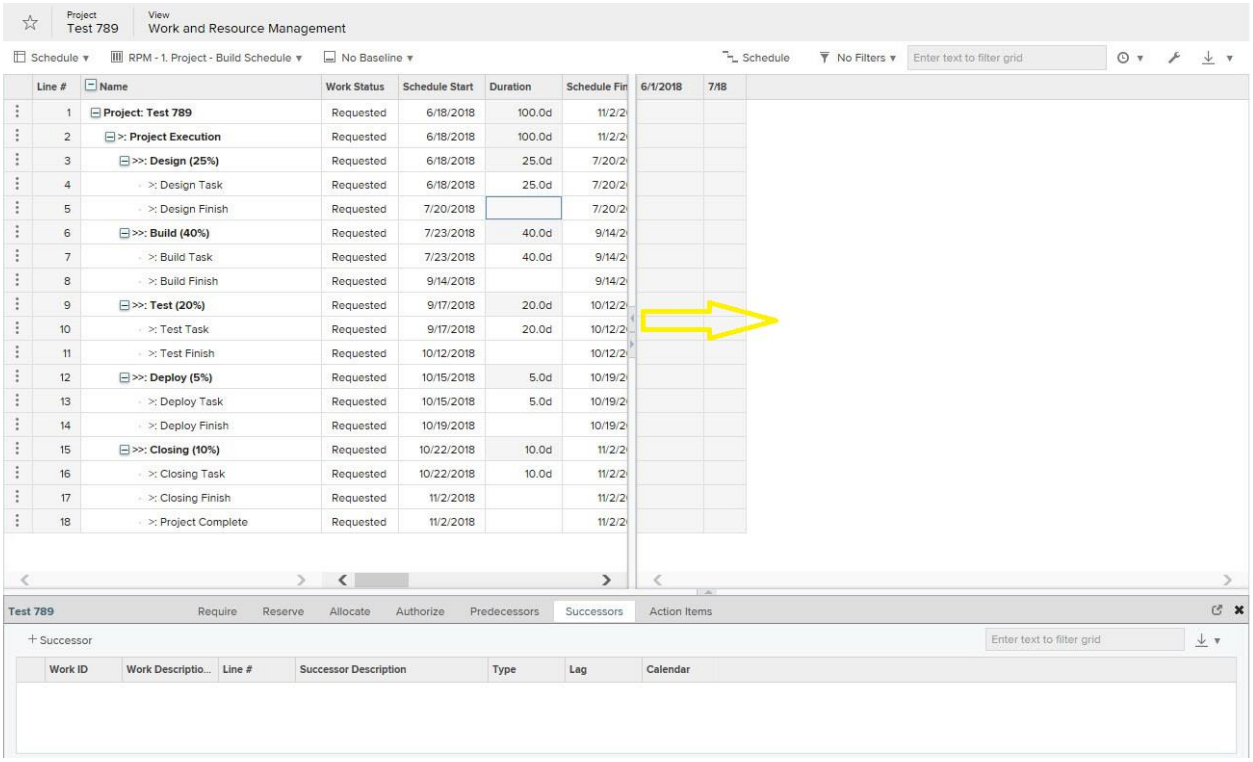
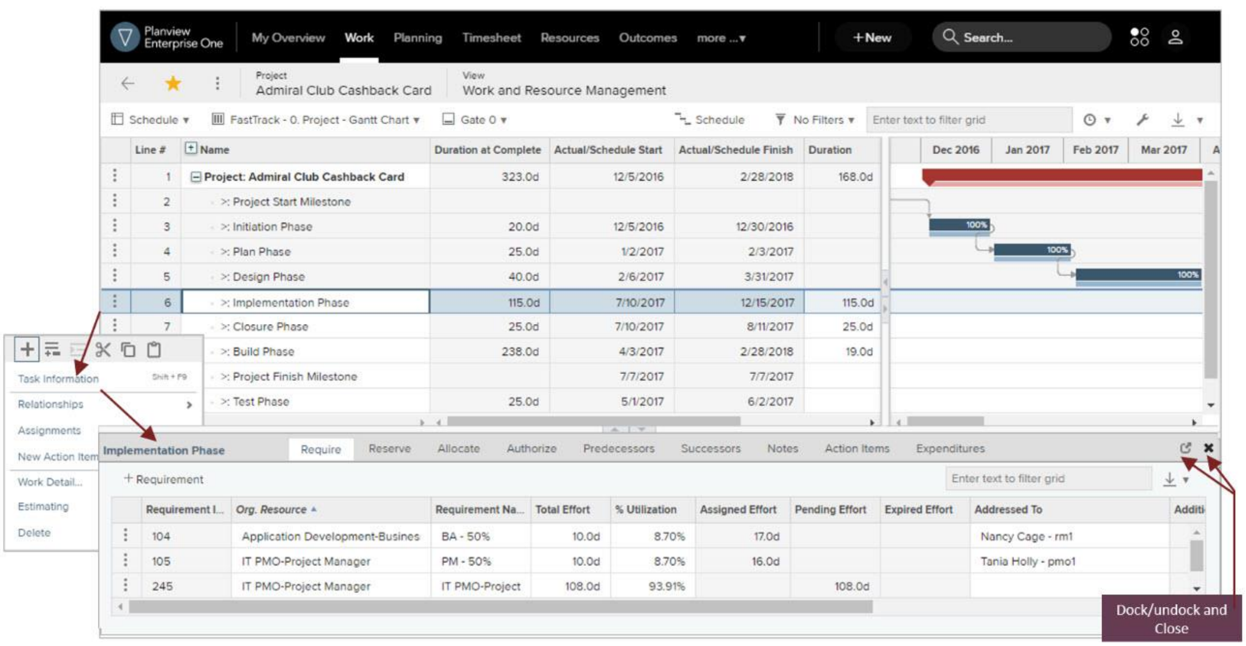
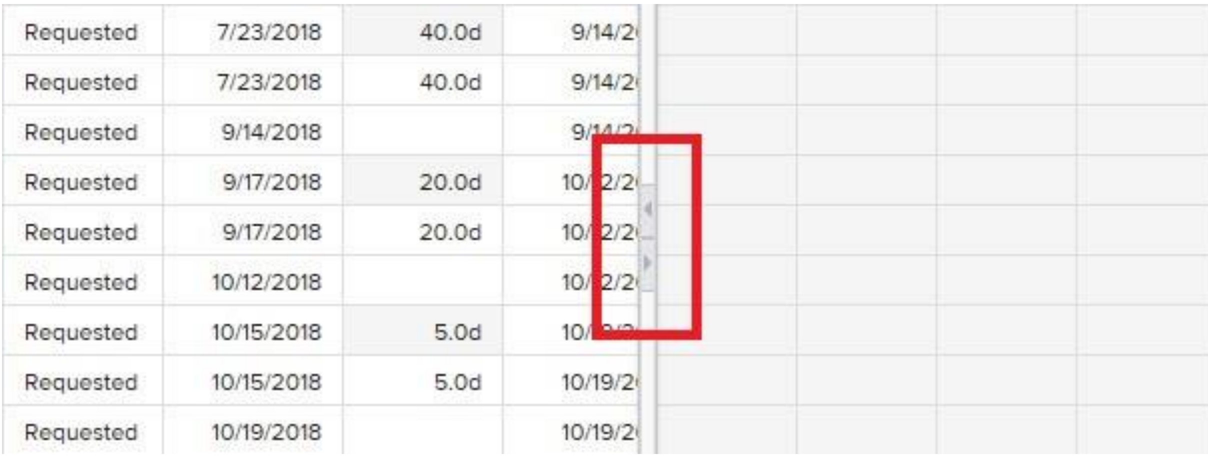


Figure PVD38. Work and Resource Management screen with Action Menu description.



8.3. To enable an expanded view of the **Work and Resource Management** screen data click the right facing caret midway down the center column separator. See figure PVD39.

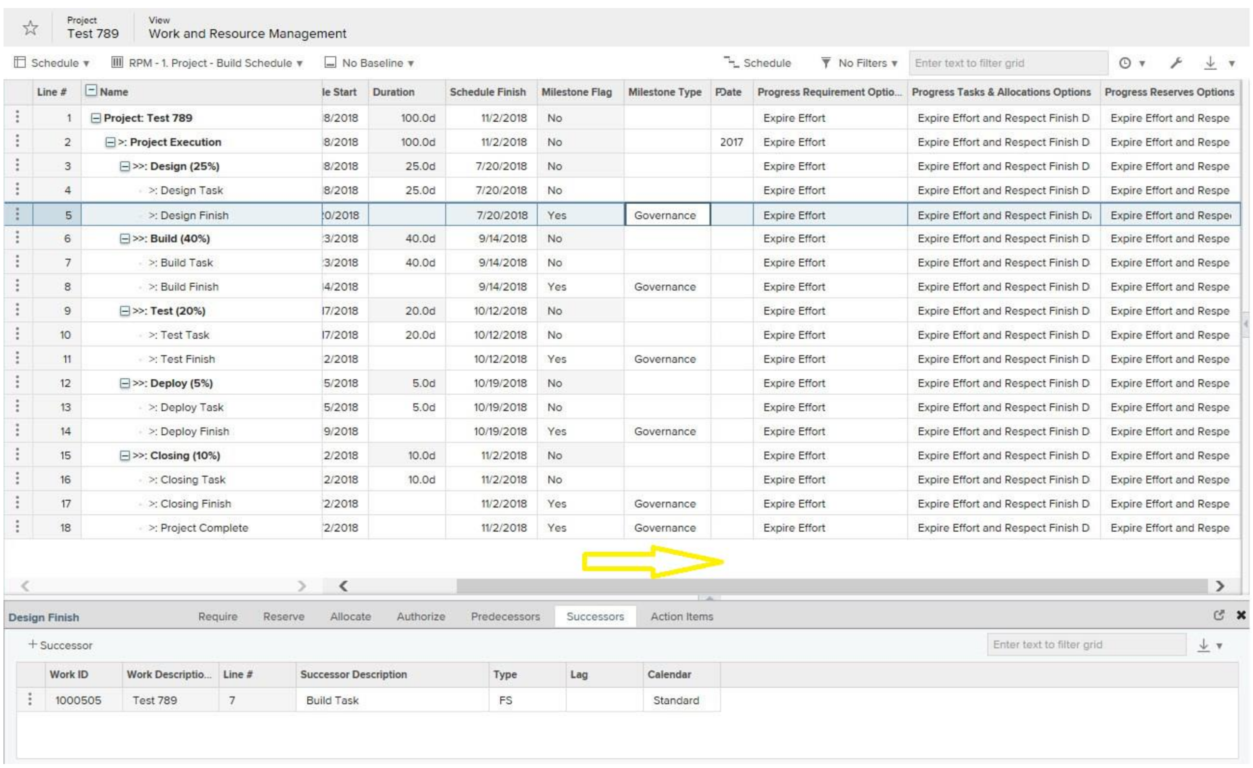
Figure PVD39. Screen expander control.



Requested	7/23/2018	40.0d	9/14/2
Requested	7/23/2018	40.0d	9/14/2
Requested	9/14/2018		9/14/2
Requested	9/17/2018	20.0d	10/ 2/2
Requested	9/17/2018	20.0d	10/ 2/2
Requested	10/12/2018		10/ 2/2
Requested	10/15/2018	5.0d	10/
Requested	10/15/2018	5.0d	10/19/2
Requested	10/19/2018		10/19/2

8.4. With the expanded view enabled the **Work and Resource Management** screen reveals several additional parameters. See figure PVD40.

Figure PVD40. Expanded Work and Resource Management screen (modified horizontally compressed screen capture- the actual Planview screen is wider).



Project Test 789 | View Work and Resource Management

Schedule ▾ | RPM - 1. Project - Build Schedule ▾ | No Baseline ▾ | Schedule | No Filters ▾ | Enter text to filter grid

Line #	Name	le Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	FDate	Progress Requirement Optio...	Progress Tasks & Allocations Options	Progress Reserves Options
1	Project: Test 789	8/2018	100.0d	11/2/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
2	>: Project Execution	8/2018	100.0d	11/2/2018	No		2017	Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
3	>>: Design (25%)	8/2018	25.0d	7/20/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
4	>: Design Task	8/2018	25.0d	7/20/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
5	>: Design Finish	0/2018		7/20/2018	Yes	Governance		Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
6	>>: Build (40%)	3/2018	40.0d	9/14/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
7	>: Build Task	3/2018	40.0d	9/14/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
8	>: Build Finish	4/2018		9/14/2018	Yes	Governance		Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
9	>>: Test (20%)	7/2018	20.0d	10/12/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
10	>: Test Task	7/2018	20.0d	10/12/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
11	>: Test Finish	2/2018		10/12/2018	Yes	Governance		Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
12	>>: Deploy (5%)	5/2018	5.0d	10/19/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
13	>: Deploy Task	5/2018	5.0d	10/19/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
14	>: Deploy Finish	9/2018		10/19/2018	Yes	Governance		Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
15	>>: Closing (10%)	2/2018	10.0d	11/2/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
16	>: Closing Task	2/2018	10.0d	11/2/2018	No			Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
17	>: Closing Finish	2/2018		11/2/2018	Yes	Governance		Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe
18	>: Project Complete	2/2018		11/2/2018	Yes	Governance		Expire Effort	Expire Effort and Respect Finish D	Expire Effort and Respe

Design Finish | Require | Reserve | Allocate | Authorize | Predecessors | Successors | Action Items

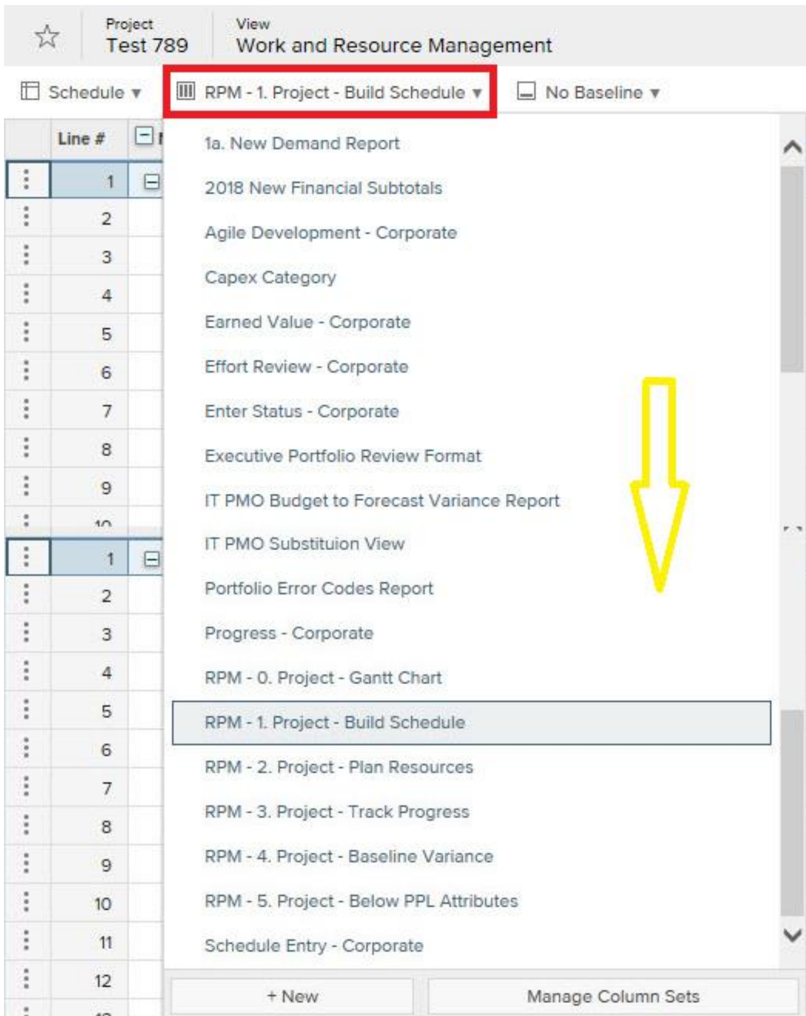
+ Successor | Enter text to filter grid

Work ID	Work Descriptio...	Line #	Successor Description	Type	Lag	Calendar
1000505	Test 789	7	Build Task	FS		Standard

8.5. The **1 RPM Build Schedule** is *usually* displayed in the **Work and Resource Management** screen by default. If it is not displayed by default select **RPM – 1.**

Project Schedule to select a different view click the down caret next to the selected view to display a list of the available options. See figure PVD41.

Figure PVD41. View options (modified vertically compressed screen capture- the actual selection list scrolls vertically).



NOTE: Double click data entry fields for dates (Schedule Start and Schedule Finish) to reveal the calendar-based date selection tool.

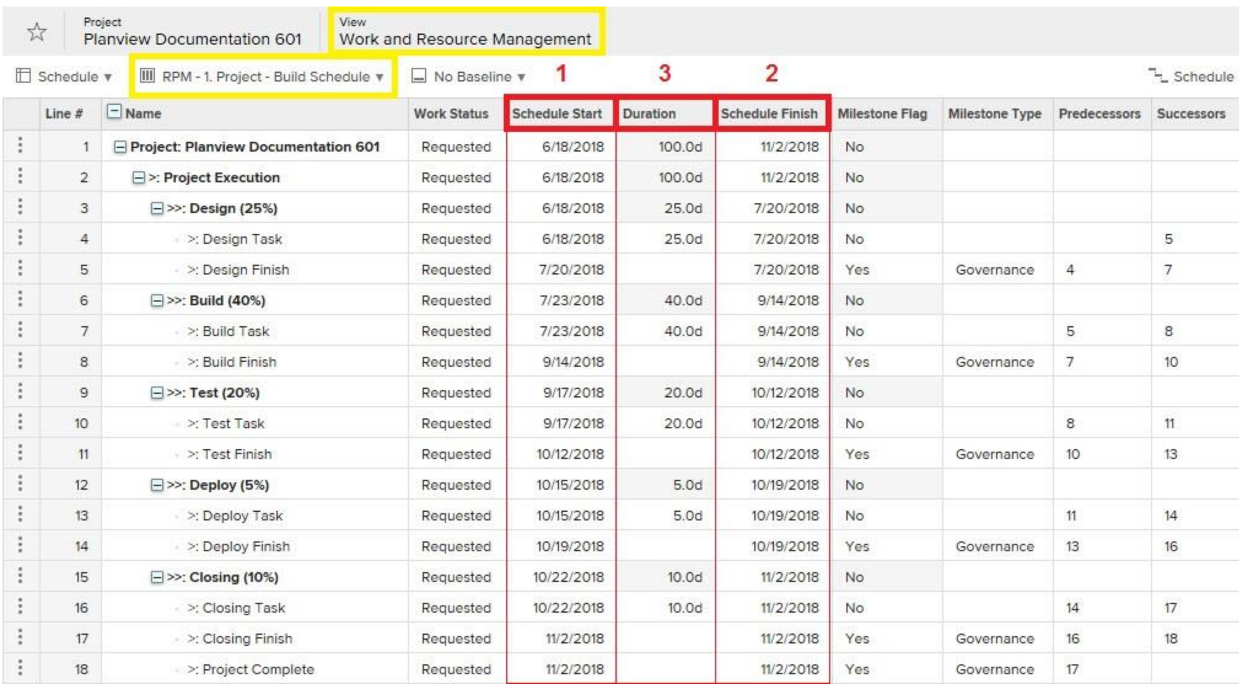
NOTE: Double click the right side of data entry fields (<u>except</u> data entry fields for dates) with preset data options to reveal the down carets and the preset data options. Then click the desired option to select it.

8.6. On **Line 1 of the Build Schedule in the Schedule Start** column double click the date in the **Schedule Start** column to reveal the calendar-based date selection tool.

Select (<u>the date the project is expected to begin</u>) in the data entry field. (figure PVD42 box 1).

8.7. On **Line 1 of the Build Schedule in the Schedule Finish** column double click the date in the **Schedule Finish** column to reveal the calendar-based date selection tool. Select (<u>the date the project is expected to conclude</u>) in the data entry field. (figure PVD42 box 2). See figure PVD42.

Figure PVD42. Schedule Start, Schedule Finish, and Duration columns (partial screen capture only- the actual Planview screen displays additional information).



Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	Successors
1	Project: Planview Documentation 601	Requested	6/18/2018	100.0d	11/2/2018	No			
2	>: Project Execution	Requested	6/18/2018	100.0d	11/2/2018	No			
3	>>: Design (25%)	Requested	6/18/2018	25.0d	7/20/2018	No			
4	>: Design Task	Requested	6/18/2018	25.0d	7/20/2018	No			5
5	>: Design Finish	Requested	7/20/2018		7/20/2018	Yes	Governance	4	7
6	>>: Build (40%)	Requested	7/23/2018	40.0d	9/14/2018	No			
7	>: Build Task	Requested	7/23/2018	40.0d	9/14/2018	No		5	8
8	>: Build Finish	Requested	9/14/2018		9/14/2018	Yes	Governance	7	10
9	>>: Test (20%)	Requested	9/17/2018	20.0d	10/12/2018	No			
10	>: Test Task	Requested	9/17/2018	20.0d	10/12/2018	No		8	11
11	>: Test Finish	Requested	10/12/2018		10/12/2018	Yes	Governance	10	13
12	>>: Deploy (5%)	Requested	10/15/2018	5.0d	10/19/2018	No			
13	>: Deploy Task	Requested	10/15/2018	5.0d	10/19/2018	No		11	14
14	>: Deploy Finish	Requested	10/19/2018		10/19/2018	Yes	Governance	13	16
15	>>: Closing (10%)	Requested	10/22/2018	10.0d	11/2/2018	No			
16	>: Closing Task	Requested	10/22/2018	10.0d	11/2/2018	No		14	17
17	>: Closing Finish	Requested	11/2/2018		11/2/2018	Yes	Governance	16	18
18	>: Project Complete	Requested	11/2/2018		11/2/2018	Yes	Governance	17	

8.8. On the remaining lines of the Build Schedule in the **Schedule Start** column review the dates on which the project milestones are expected to start (figure PVD42 box 1). Double click any of the dates to reveal the calendar-based date selection tool and select an alternate date.

8.9. On the remaining lines of the Build Schedule in the **Schedule Finish** column review the dates on which the milestones are expected to conclude. (figure PVD42 box 2). Double click any of the dates to reveal the calendar-based date selection tool and select an alternate date.

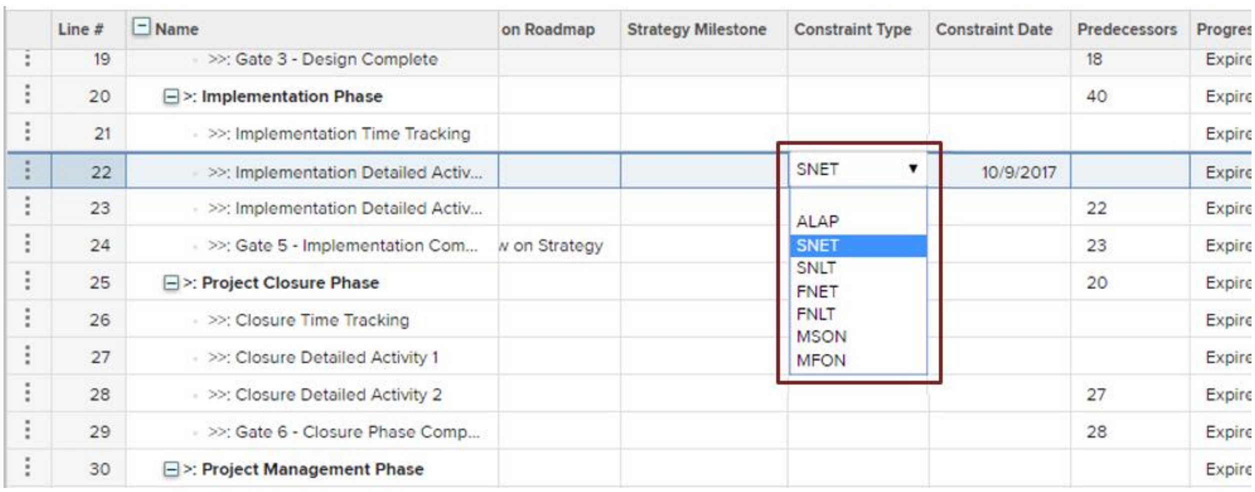
8.10. On the remaining lines of the Build Schedule in the **Duration** column review the durations for each phase/task (figure PVD42 box 3). Double click the data entry fields to enter (<u>revised duration data</u>). See figure PVD42 (above).

NOTE: Only non-shaded (white in the browser) fields are editable.

NOTE: Revisions to the **Durations** *will affect* **Schedule Start** *and* **Schedule Finish** *dates.*

8.11. To assign a **Constraint** double click the **Constraint Type** column on the appropriate phase/task line to reveal a down caret and dropdown list of available constraint types. Click the Constraint Type to select it and apply it to the phase/task. See figure PVD43.

Figure PVD43. Constraint type selection options (partial screen capture only- the actual Planview screen displays additional information).



Line #	Name	on Roadmap	Strategy Milestone	Constraint Type	Constraint Date	Predecessors	Progres
19	>>: Gate 3 - Design Complete					18	Expire
20	>: Implementation Phase					40	Expire
21	>>: Implementation Time Tracking						Expire
22	>>: Implementation Detailed Activ...			SNET	10/9/2017		Expire
23	>>: Implementation Detailed Activ...					22	Expire
24	>>: Gate 5 - Implementation Com...	w on Strategy				23	Expire
25	>: Project Closure Phase					20	Expire
26	>>: Closure Time Tracking						Expire
27	>>: Closure Detailed Activity 1						Expire
28	>>: Closure Detailed Activity 2					27	Expire
29	>>: Gate 6 - Closure Phase Comp...					28	Expire
30	>: Project Management Phase						Expire

NOTE: Constraint acronyms in Planview are ALAP (as late as possible), SNET (start no earlier than), SNLT (start no later than), FNET (finish no earlier than), FNLT (finish no later than), MSON (must start on), and MFON (must finish on).

NOTE: When **Constraint** *data fields are left blank the system interprets those phases/tasks as unconstrained and treats them as ASAP (as soon as possible) dates.*

8.12. Once **Schedule Start**, **Schedule Finish**, and **Duration** selections are all made verify the selections are complete and correct.

8.13. Click Schedule in the upper left portion of the **Work and Resource Management** screen.

8.14. Select Schedule and Assignments.

8.15. The **Work and Resource Management** screen will now display both schedule and resource information when entered.

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9. Resource Management

Request stage- Proposal Managers

https://success.planview.com/Planview_Enterprise_One/Portfolio_and_Resource_Management/40Resource_Management

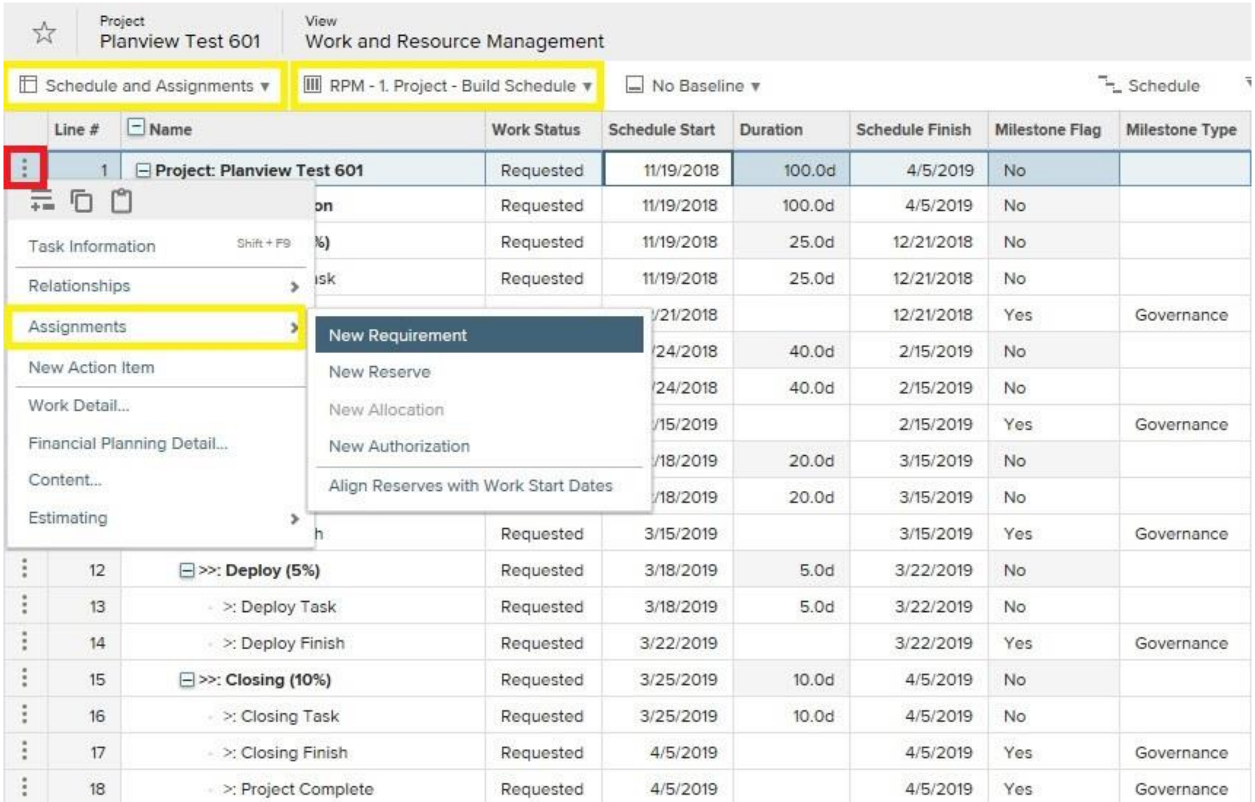
Note: Resource Roles can be assigned at the overall project level or by Phase (task). Resource Roles defined at the Project level are assigned for the entire duration of project. An example of a Resource Role assigned for the duration of a Project is a Project Manager. Examples of Resource Roles assigned for specific Phase(s) of a Project include business analysts, architects, developers, and engineers.

9.1. Assigning Roles

9.1.1. Click the action menu icon (the three vertical dots [ellipsis]) next to line 1 on the far left of the **Work and Resource Management** screen.

9.1.2. From the revealed **Action Menu** options select **Assignments**, then **New Requirement**. See figure PVD44.

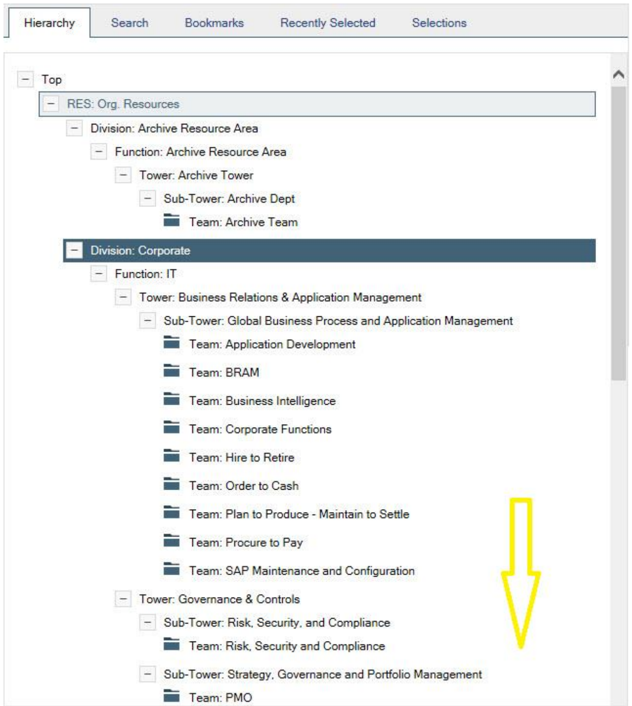
Figure PVD44. New Requirements (partial screen capture only- the actual Planview screen displays additional information).

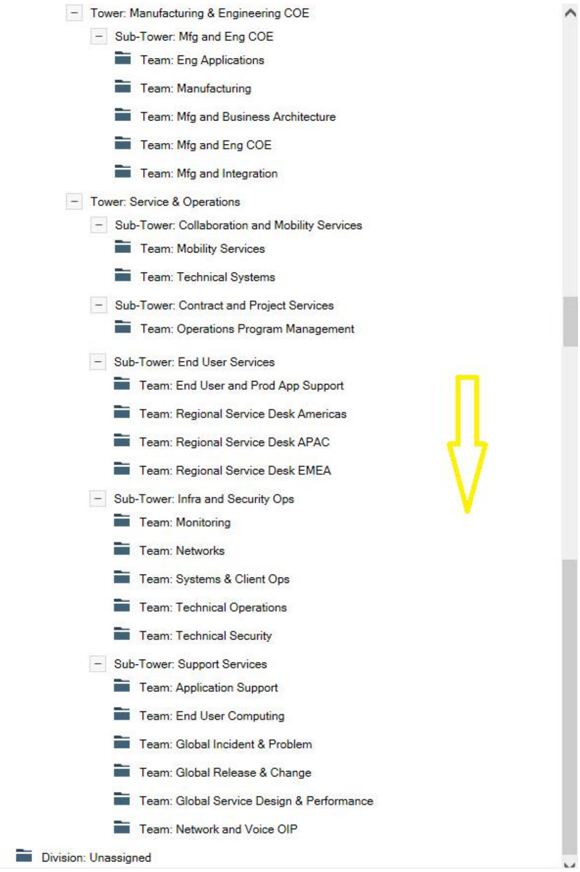


9.1.3. A **Hierarchy** data picker screen with options for the requirement opens.

9.1.4. In the left column of the **Hierarchy** data picker screen, click the + icons to reveal the cascading drop down lists of available roles for the requirement. See figure PVD45.

Figure PVD45. Cascading drop down list in the data picker screen (left data column only- modified scrolling screen capture arranged adjacently vice vertically to save space).





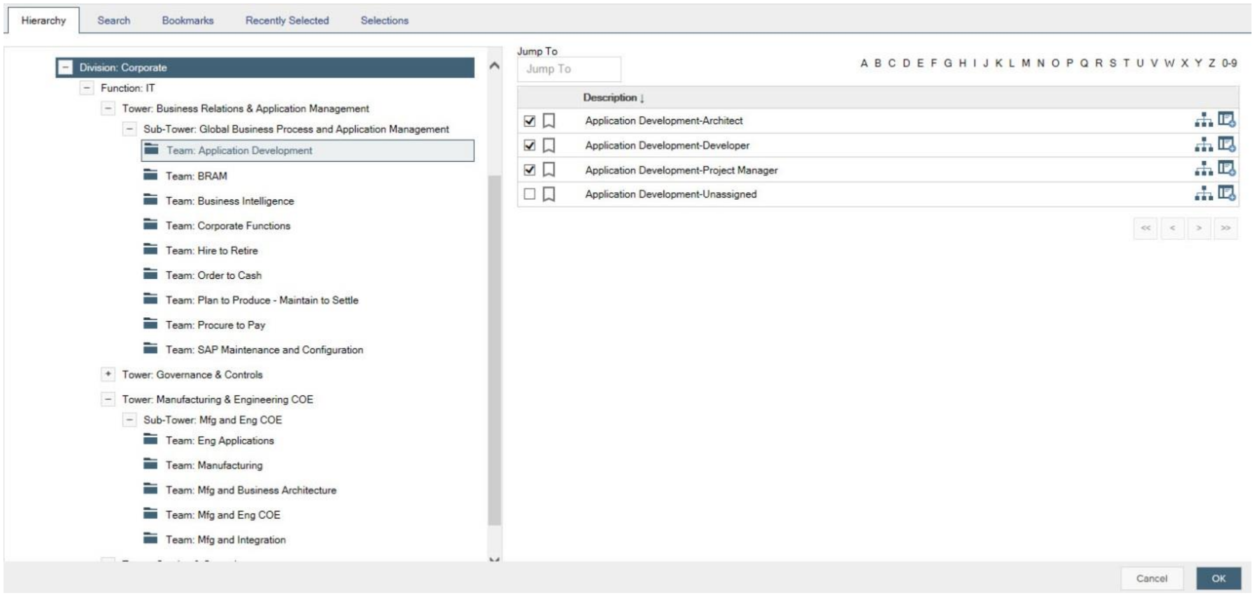
9.1.5. Select the Tower and then the Sub Tower from which the role will be assigned to the project.

9.1.6. Click the check box next to the role (or multiple roles) listed on the right side of the screen to be assigned to the project.

NOTE: Roles can be selected in multiple Towers and Teams for any single phase or task as well. All roles selected will be added to the Work and Resource Management screen after OK is clicked in the Hierarchy data picker screen.

9.1.7. Click OK in the lower right corner of the **Hierarchy** data picker screen to save role selections. See Figure PVD46.

Figure PVD46. Role selections in the data picker screen.



9.1.8. After OK is clicked in the **Hierarchy** data picker screen the selected roles now appear in the **Work and Resource Management** screen next to the phases/tasks to which they were assigned. They also appear in the **Requirements** list at the bottom of the screen. See figures PVD47 and PVD48.

Figure PVD47. Assigned roles/resources and Resources list.

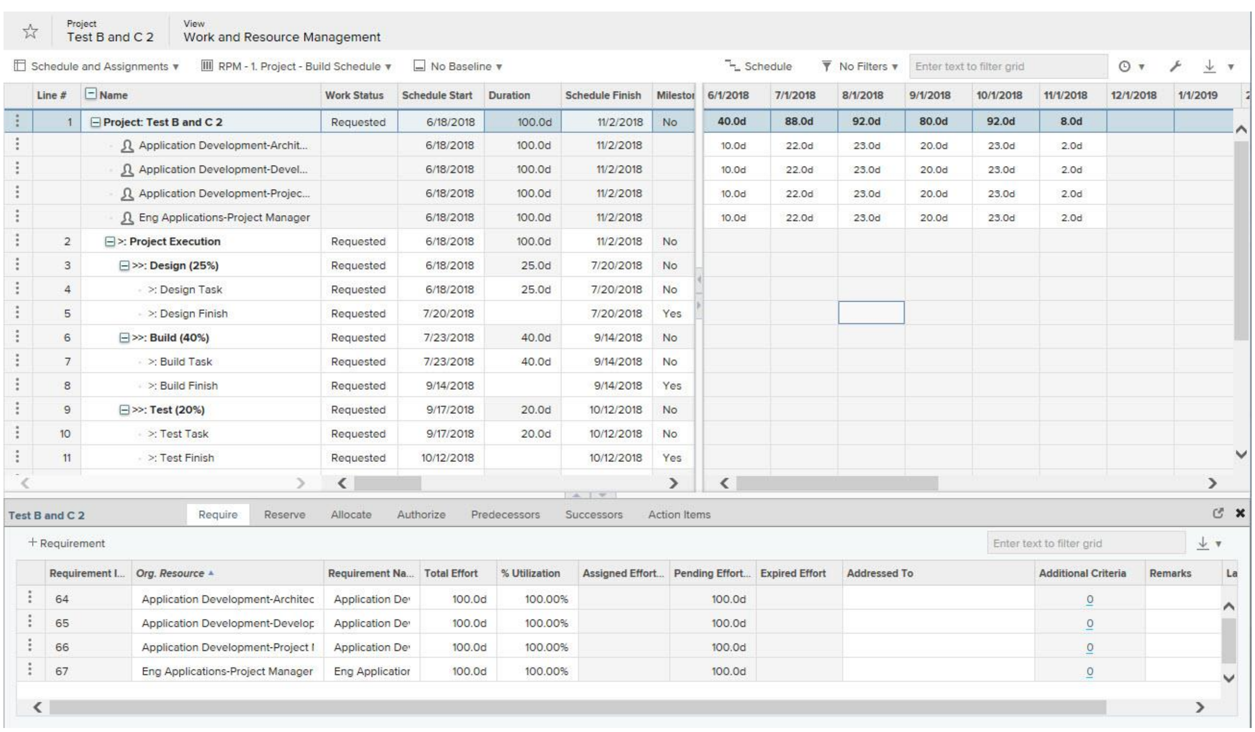
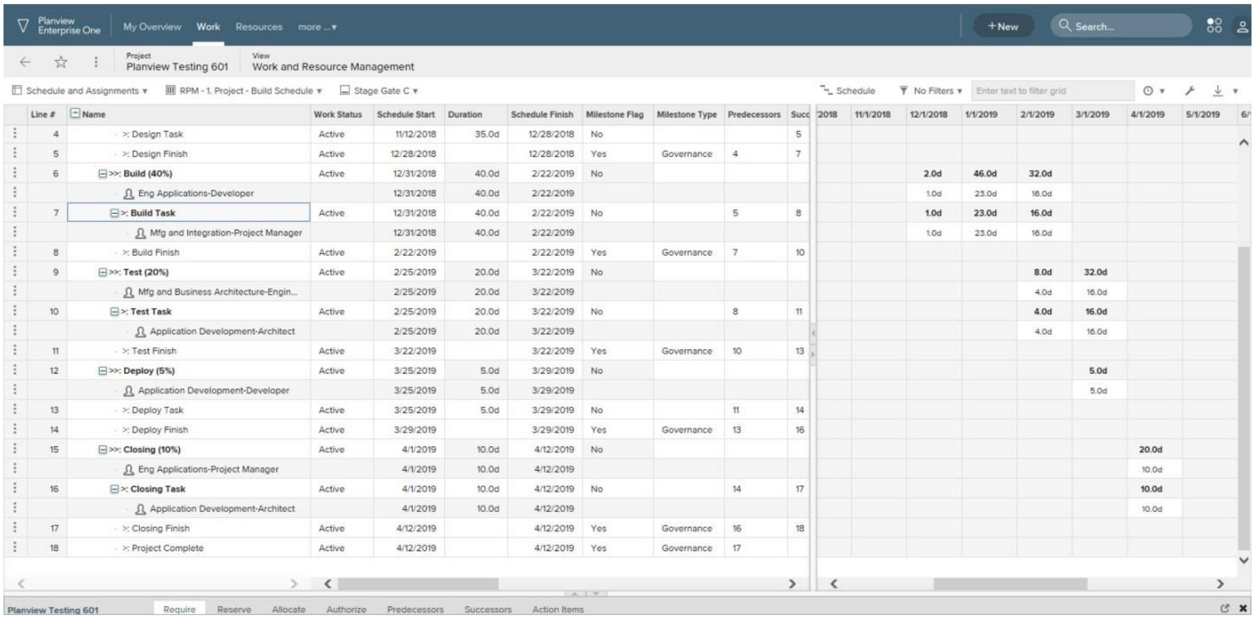


Figure PVD48. Expanded screen capture with roles assigned to multiple phases.



9.2. <u>Resource Capacity Management</u>

9.2.1. Stage Gate A during the Demand Process requires only role definition as opposed to assignment of actual personnel for the roles.

9.2.2. Huntsman will move toward Resource Managers reviewing and assigning project personnel resources.

9.2.3. A full roll-out plan for resource assignment will be defined, aiming for launch in 1Q 2019. The requests will be reviewed and approved by the resource managers.

9.2.4. Once the schedule dates and required resources for the project are all verified, click the Schedule button in the upper right portion of the **Work and Resource Management** screen toolbar. See figure PVD54.

Figure PVD54. Schedule (partial screen capture only- the actual Planview screen displays additional information).

Project Test 789 | View Work and Resource Management

Schedule ▾ | RPM - 1. Project - Build Schedule ▾ | No Baseline ▾ | Schedule | No Filt

Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	Successors	Constraint Type	Constraint Date
1	Project: Test 789	Requested	1/14/2019	142.0d	7/30/2019	No				SNET	1/14/2019
2	>: Project Execution	Requested	1/14/2019	142.0d	7/30/2019	No				SNET	8/21/2017
3	>>: Design (25%)	Requested	1/14/2019	25.0d	2/15/2019	No					
4	>: Design Task	Requested	1/14/2019	25.0d	2/15/2019	No			5		
5	>: Design Finish	Requested	2/15/2019		2/15/2019	Yes	Governance	4	7		
6	>>: Build (40%)	Requested	2/18/2019	40.0d	4/12/2019	No					
7	>: Build Task	Requested	2/18/2019	40.0d	4/12/2019	No		5	8		
8	>: Build Finish	Requested	4/12/2019		4/12/2019	Yes	Governance	7	10		
9	>>: Test (20%)	Requested	4/15/2019	20.0d	5/10/2019	No					
10	>: Test Task	Requested	4/15/2019	20.0d	5/10/2019	No		8	11		
11	>: Test Finish	Requested	5/10/2019		5/10/2019	Yes	Governance	10	13		
12	>>: Deploy (5%)	Requested	5/13/2019	5.0d	5/17/2019	No					
13	>: Deploy Task	Requested	5/13/2019	5.0d	5/17/2019	No		11	14		
14	>: Deploy Finish	Requested	5/17/2019		5/17/2019	Yes	Governance	13	16		
15	>>: Closing (10%)	Requested	5/20/2019	52.0d	7/30/2019	No					
16	>: Closing Task	Requested	5/20/2019	10.0d	5/31/2019	No		14	17		
17	>: Closing Finish	Requested	5/31/2019		5/31/2019	Yes	Governance	16	18		
18	>: Project Complete	Requested	7/31/2019		7/31/2019	Yes	Governance	17		SNET	7/31/2019

NOTE: After **Schedule** *is clicked the icon function changes to* **Undo Schedule**.

NOTE: To revise the schedule at this point click Undo Schedule *and make the necessary changes, then click* Schedule *again to save changes.* See figure PVD55.

Figure PVD55. Undo Schedule (partial screen capture only- the actual Planview screen displays additional information).

Project Test 789 | View Work and Resource Management

Schedule ▾ | RPM - 1. Project - Build Schedule ▾ | No Baseline ▾ | Undo Schedule | No Filt

Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors	Successors	Constraint Type	Constraint Date
1	Project: Test 789	Requested	1/14/2019	142.0d	7/30/2019	No				SNET	1/14/2019
2	>: Project Execution	Requested	1/14/2019	142.0d	7/30/2019	No				SNET	8/21/2017
3	>>: Design (25%)	Requested	1/14/2019	25.0d	2/15/2019	No					
4	>: Design Task	Requested	1/14/2019	25.0d	2/15/2019	No			5		
5	>: Design Finish	Requested	2/15/2019		2/15/2019	Yes	Governance	4	7		
6	>>: Build (40%)	Requested	2/18/2019	40.0d	4/12/2019	No					
7	>: Build Task	Requested	2/18/2019	40.0d	4/12/2019	No		5	8		
8	>: Build Finish	Requested	4/12/2019		4/12/2019	Yes	Governance	7	10		
9	>>: Test (20%)	Requested	4/15/2019	20.0d	5/10/2019	No					
10	>: Test Task	Requested	4/15/2019	20.0d	5/10/2019	No		8	11		
11	>: Test Finish	Requested	5/10/2019		5/10/2019	Yes	Governance	10	13		
12	>>: Deploy (5%)	Requested	5/13/2019	5.0d	5/17/2019	No					
13	>: Deploy Task	Requested	5/13/2019	5.0d	5/17/2019	No		11	14		
14	>: Deploy Finish	Requested	5/17/2019		5/17/2019	Yes	Governance	13	16		
15	>>: Closing (10%)	Requested	5/20/2019	52.0d	7/30/2019	No					
16	>: Closing Task	Requested	5/20/2019	10.0d	5/31/2019	No		14	17		
17	>: Closing Finish	Requested	5/31/2019		5/31/2019	Yes	Governance	16	18		
18	>: Project Complete	Requested	7/31/2019		7/31/2019	Yes	Governance	17		SNET	7/31/2019

9.2.5. Once the schedule dates for the project are all entered and verified, click *only* the Close icon (**X**) in the menu bar to save the schedule. See figure PVD56.

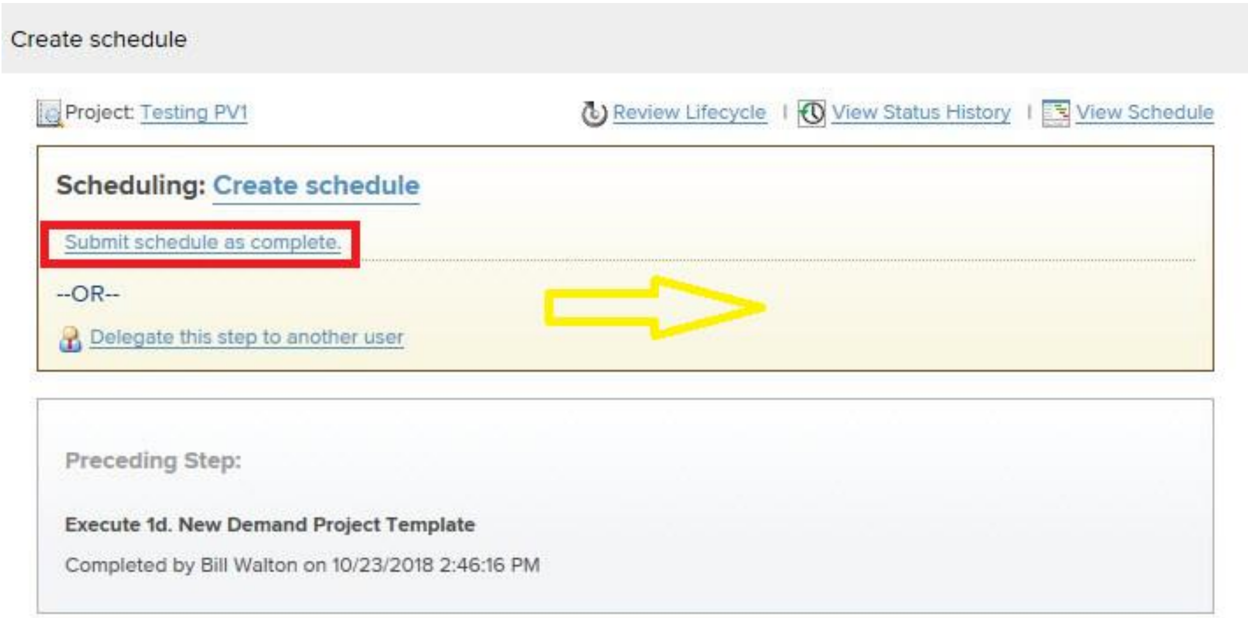
*NOTE: Use only the Planview Close button to stop working in Planview. Work is **not** saved if the browser session itself is closed instead. See figure PVD56.*

Figure PVD56. Planview Close icon in green and browser close icon in red (partial screen capture of the upper right corner of the browser window only).

9.2.6. After clicking Close in the **Work and Resource Management** screen the **Scheduling: Create schedule** dialog box is displayed.

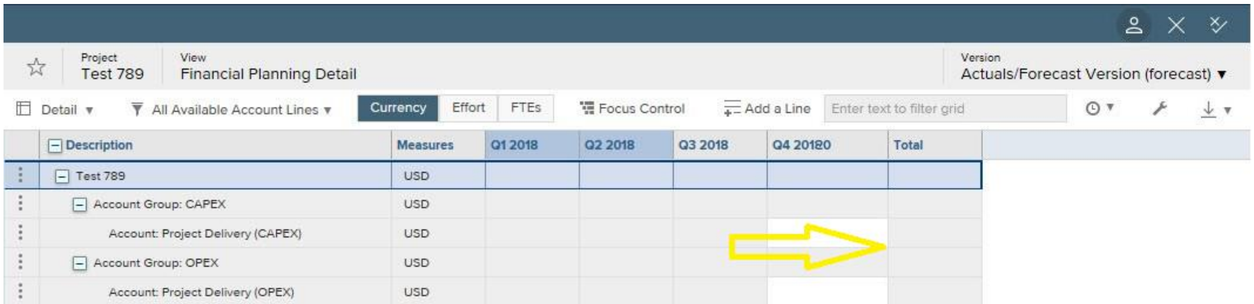
9.2.7. Click the Submit schedule as complete hyperlink in the **Scheduling: Create schedule** dialog box. See figure PVD57.

Figure PVD57. Submit schedule as complete (modified horizontally compressed screen capture- the actual Planview screen is wider).



9.2.8. After the Submit schedule as complete hyperlink is clicked in the **Create schedule** dialog box the **Financial Planning Detail** screen is displayed. See figure PVD58.

Figure PVD58. Financial Planning Detail screen (modified horizontally compressed screen capture- the actual Planview screen is wider).



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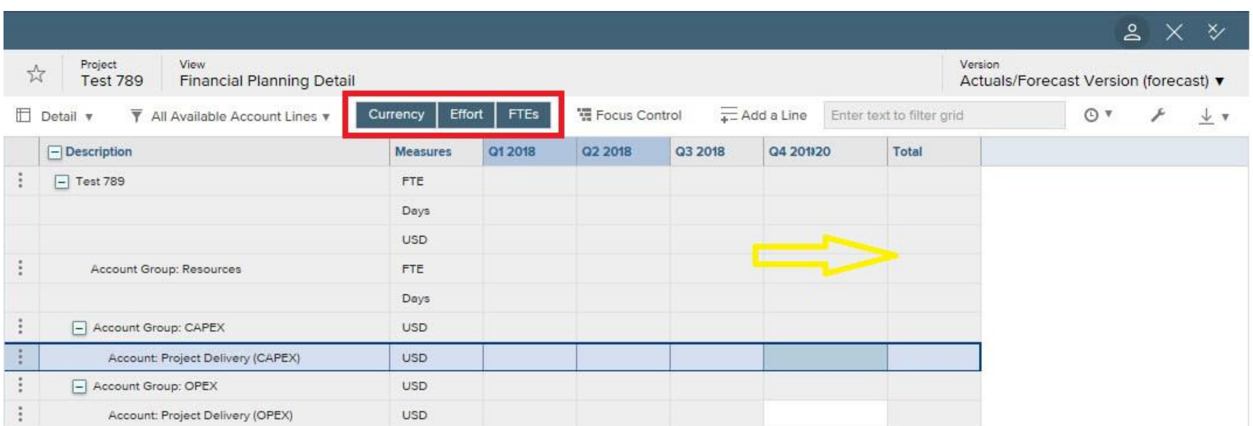
10. <u>Financial Planning Detail</u>

Request stage- Proposal Managers

10.1. Click the Currency, Effort, and FTEs links in the toolbar to view all available lines of data. See figure PVD59.

Figure PVD59. Expanded detail (modified horizontally compressed screen capture- the actual Planview screen is wider).



10.2. Ensuring the data is entered ***only*** in the correct **CAPEX Project Delivery** data entry field and in the correct column, enter (<u>the forecast amounts in US dollars</u>).

10.3. Ensuring the data is entered ***only*** in the correct **OPEX Project Delivery** data entry field and in the correct column, enter (<u>the forecast amounts in US dollars</u>).

NOTE: As data is entered in the **CAPEX** *and* **OPEX Project Delivery** *data entry fields other lines will prefill and prefilled data may change.*

NOTE: Only the non-shaded fields (white in the bowser) are editable. See figure PVD60.

Figure PVD60. Financial Summary with CAPEX and OPEX entered (modified horizontally compressed screen capture- the actual Planview screen is wider).

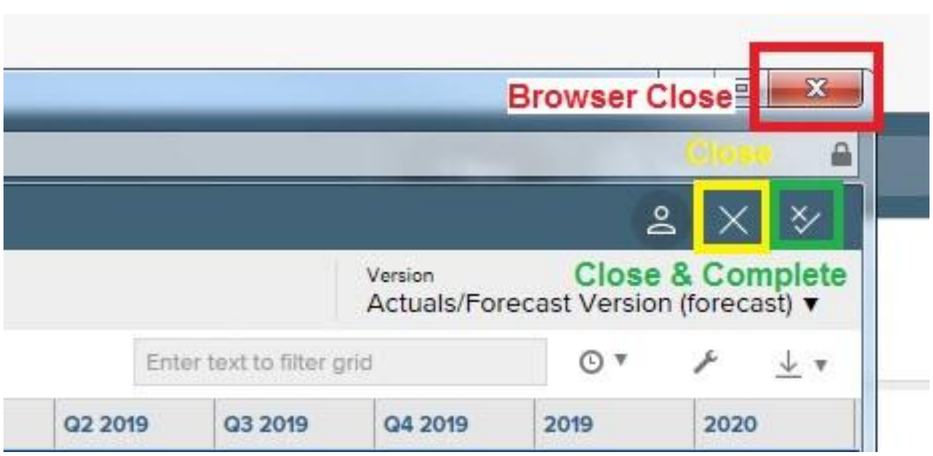
Description	Measures	Q4 2018	2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	2019	2020	Total
Planview Testing 601	FTE									
	Days									
	USD	$7,000	$7,000	$16,000	$7,000			$23,000		$30,000
Account Group: Resources	FTE									
	Days									
Account Group: CAPEX	USD	$5,000	$5,000	$10,000	$5,000			$15,000		$20,000
Account: Project Delivery (CAPEX)	USD	$5,000	$5,000	$10,000	$5,000			$15,000		$20,000
Account Group: OPEX	USD	$2,000	$2,000	$6,000	$2,000			$8,000		$10,000
Account: Project Delivery (OPEX)	USD	$2,000	$2,000	$6,000	$2,000			$8,000		$10,000

10.4. Verify that the monthly, quarterly, and/or yearly totals are equal to the forecasted amounts.

NOTE: If the months are displayed with a blue background those months are actual numbers as opposed to forecasted numbers. Actual numbers should not be changed and cannot be changed here.

10.5. Click the Close & Complete icon (X with ✓underneath) in the upper right corner of the **Financial Planning Detail** screen menu bar. See figure PVD61.

Figure PVD 61. Planvew Close & Complete icon in green, Planview Close icon in yellow, and browser close icon in red (partial screen capture of the upper right corner of the browser window only).

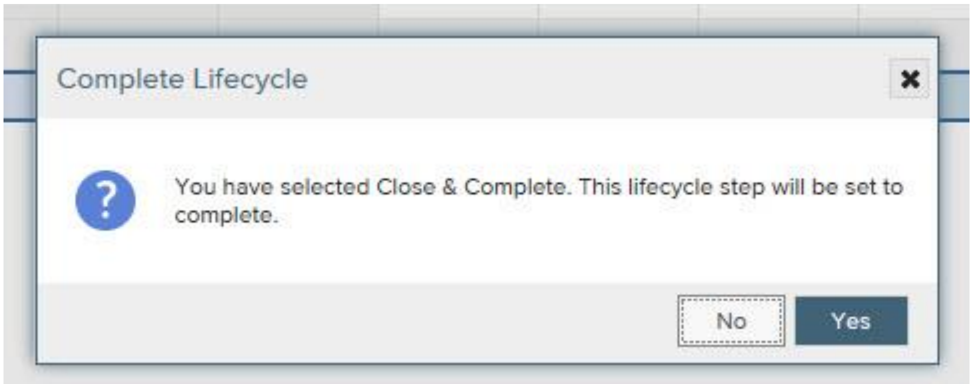


NOTE: Use only the Close & Complete (or) Close icons in Planview to stop working in Planview. Work is not saved if the browser session itself is closed instead.

10.6. After clicking Close and Complete in the **Financial Planning Detail** screen the **Complete Lifecycle** dialog box is displayed.

10.7. In the **Complete Lifecycle** dialog box click Yes to complete the Stage Gate A scheduling and financials entry process. See figure PVD62.

Figure PVD62. Complete Lifecycle dialog box.



The Stage Gate A scheduling and financials entry process is now complete.

NOTE: The Proposal Manager Lead approves the New Demand Summary after completion of the preceding steps. The workflow is still in the request stage until after approval.

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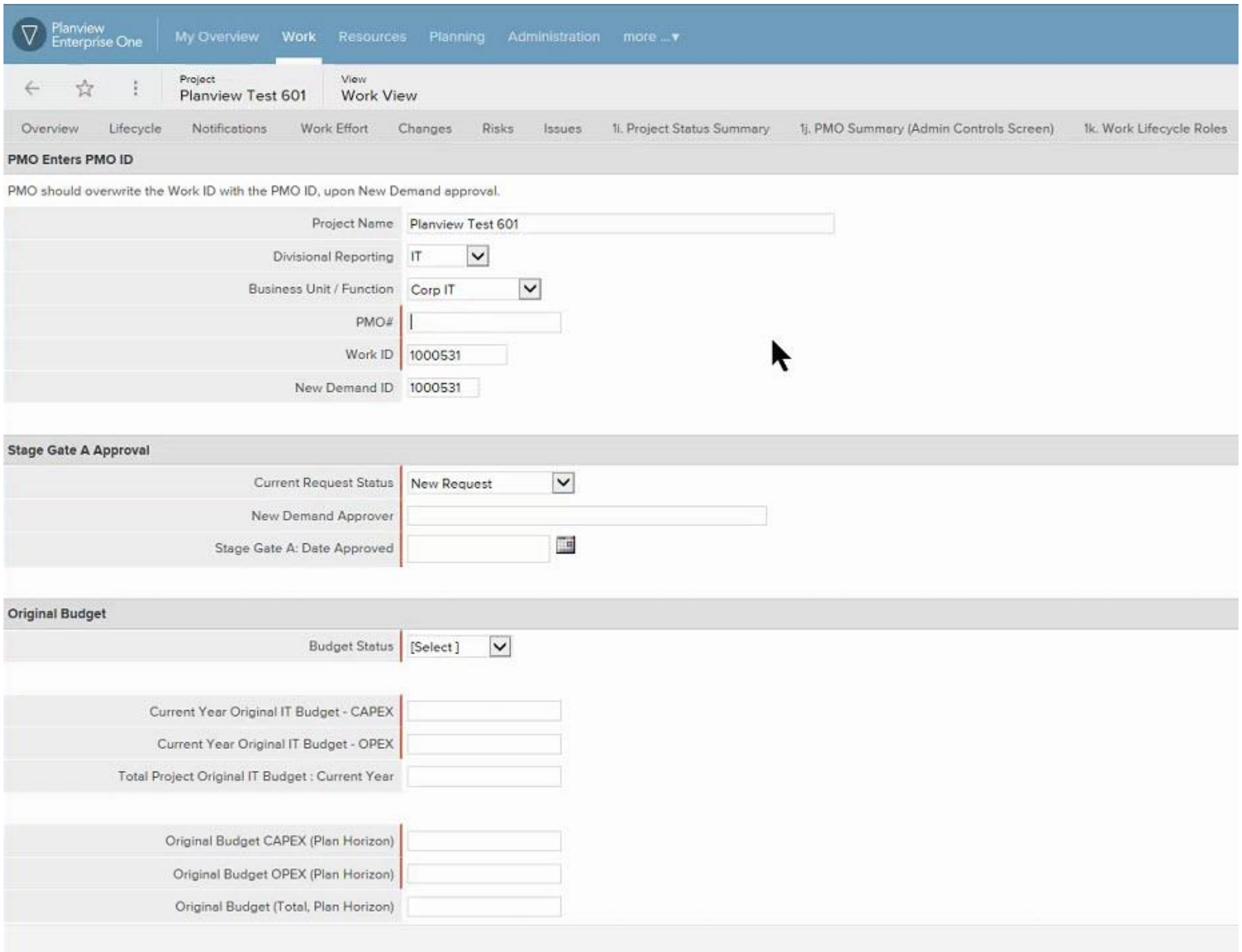
11. Work Initialization & Original Budget Input

NOTE: The PMO Admin is responsible for the Work Initialization & Original Budget inputs.

Figure PVD63. Work Initiation & Original Budget Input screen



11.1. PMO Enters PMO ID

11.1.1. The **Project Name** field is prefilled.

11.1.2. The **Divisional Reporting** field is prefilled.

11.1.3. The **Business Unit / Function** field is prefilled.

11.1.4. Click in the **PMO#** data entry field to enter (<u>the PMO number</u>) using the following format: XXXXX. Example- 18215

The first two digits represent the year (18). The next single digit represents the Division (2). The final two digits represent the sequential number of the project for that Division (15). 18215 therefore represents 2018, ADMAT, and the 15th ADMAT project of the year.

11.1.5. The **Work ID** field is prefilled.

11.1.6. The **New Demand ID** field is prefilled.

11.2. Stage Gate A Approval

11.2.1. The **Current Request Status** is prefilled.

11.2.2. Click in the **New Demand Approver** data entry field to enter (the name of the new demand approver).

11.2.3. Select the **Stage Gate A: Date Approved** date by clicking the calendar launch icon next to the **Stage Gate A: Date Approved** data selection field and selecting (the date on which the project received Stage Gate A approval).

11.3. Original Budget

11.3.1. Select a **Budget Status** response by clicking the down caret next to the **Budget Status** data selection field and clicking (the current status of the request) from the options listed in the dropdown menu to select it.

11.3.2. Click in the **Current Year Original IT Budget - CAPEX** data entry field to enter (the CAPEX budget for the project in the current year).

11.3.3. Click in the **Current Year Original IT Budget - OPEX** data entry field to enter (the OPEX budget for the project in the current year).

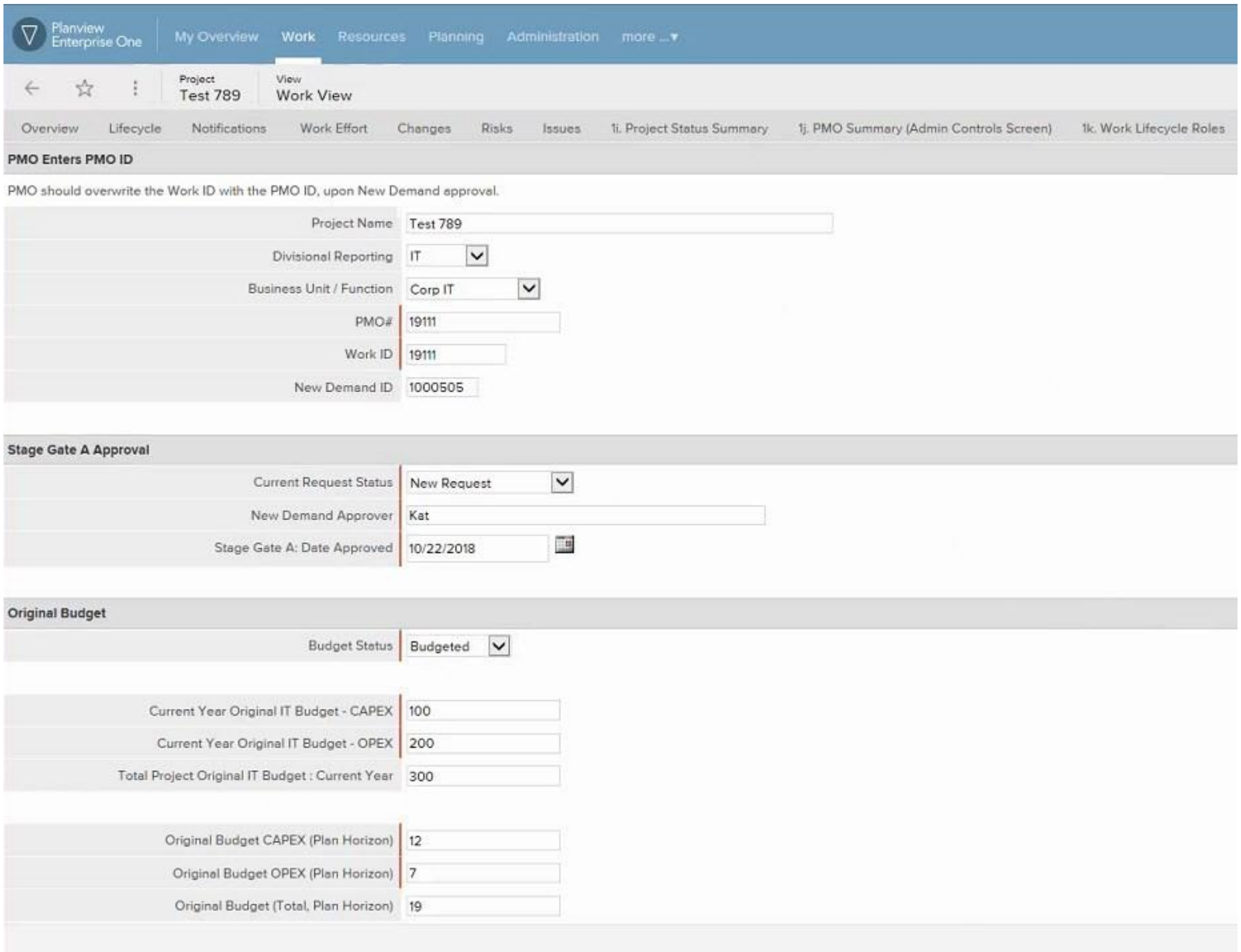
11.3.4. Click in the **Total Project Original IT Budget : Current Year** data entry field to enter (the total CAPEX and OPEX budget for the project in the current year).

11.3.5. Click in the **Original Budget CAPEX (Plan Horizon)** data entry field to enter (the planned CAPEX budget for the project through completion).

11.3.6. Click in the **Original Budget OPEX (Plan Horizon)** data entry field to enter (the planned OPEX budget for the project through completion).

11.3.7. Click in the **Original Budget (Total, Plan Horizon)** data entry field to enter (the total planned CAPEX and OPEX budget for the project through completion). See figure PVD64.

Figure PVD64. Work Initiation & Original Budget Input (completed).



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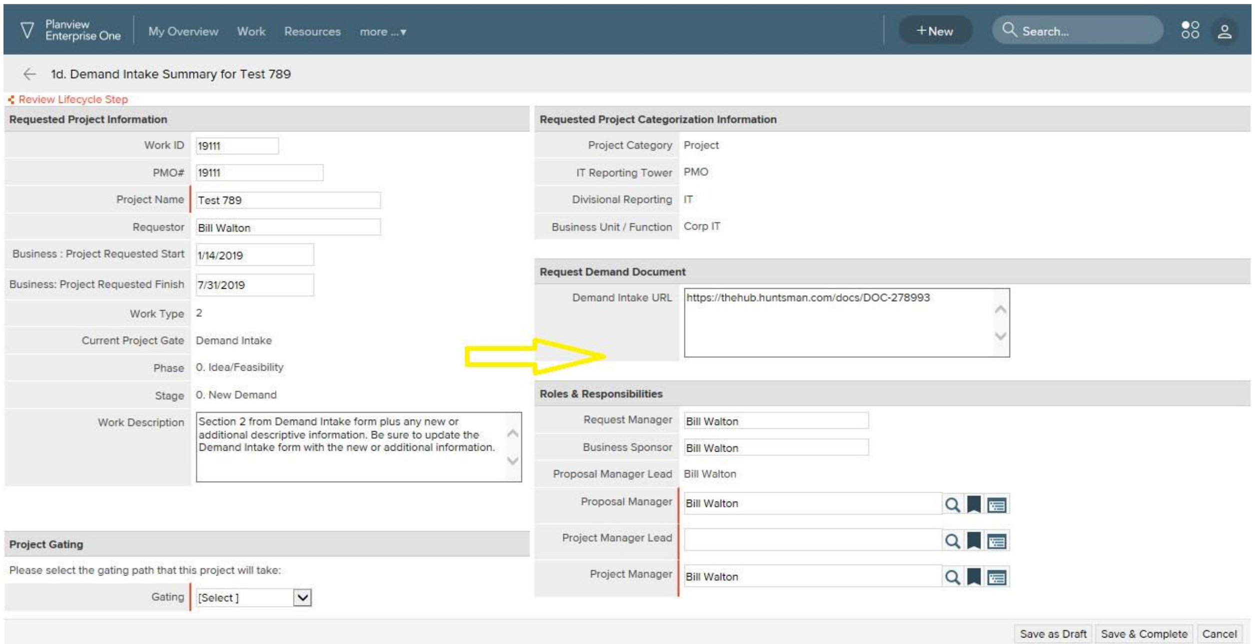
12. Demand Intake Summary

Proposal stage- Proposal Managers

Click the Demand Intake Summary hyperlink in the email generated by Planview (or) click the project name in the **My Overview** page in Planview.

The **Demand Intake Summary** screen for the project is displayed. See figure PVD66.

Figure PVD66. Demand Intake Summary (modified horizontally compressed screen capture- the actual Planview screen is wider).



NOTE: Proposal Manager Lead is responsible for the accuracy of the data in the Demand Intake Summary and identification of the Project Manager Lead and verification of the Project Manager.

12.1. Project Gating

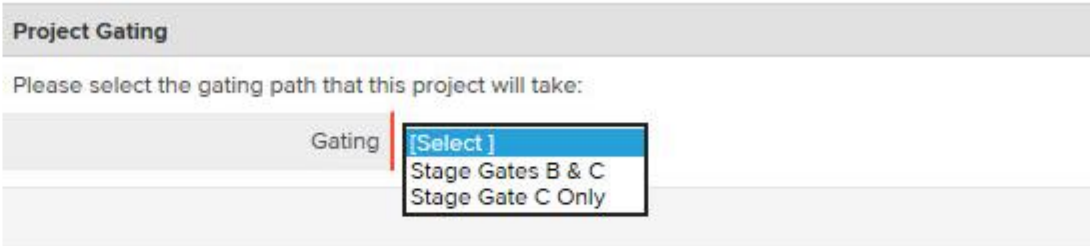
12.1.1. At the bottom of the left data column select a **Gating** response by clicking the down caret next to the **Project Gating** data selection field and clicking (the gating requirements for the project) from the listed options in the dropdown menu to select it. See figure PVD67.

NOTE: Selection of Stage Gate B & C will result in additional Planview workflow steps. This procedure was written for Stage Gate B and Stage Gate C. A separate Stage Gate C only procedure is available here.

NOTE: Stage Gate C only is usually used when all functional approvals are in hand, all budget support is secured, and no action items are pending.

NOTE: Work types 1 and 2 usually require Stage Gates B and C. Work type 3 can often be done using Stage Gate C only, but there are no hard and fast rules for this.

Figure PVD67. Project Gating selection options (partial screen capture only).



12.2. Roles & Responsibilities

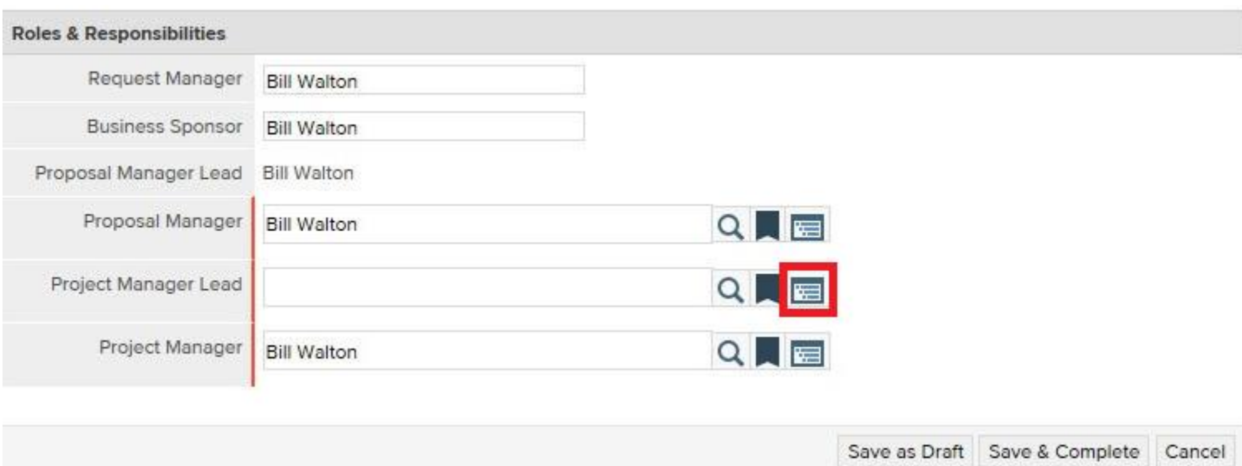
12.2.1. The **Request Manager** field is prefilled.

12.2.2. The **Business Sponsor** field is prefilled.

12.2.3. The **Proposal Manager Lead** field is prefilled.

12.2.4. Near the bottom of the right data column under **Roles & Responsibilities** select a response for the **Project Manager Lead** data selection field. Click the data picker icon next to the **Project Manager Lead** data selection field to display a **Directory** data picker list of personnel with that role in Planview. See figure PVD68.

Figure PVD68. Roles & Responsibilities incomplete with data picker icon in red box (this section only).

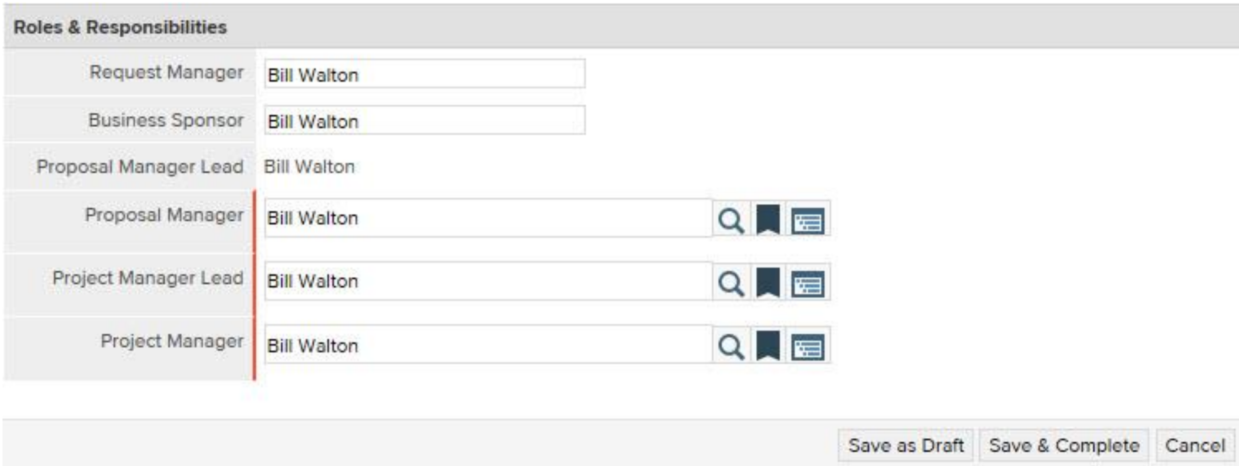


12.2.5. Click the radio button to the left of the name of (the appropriate Project Manager) to select him or her from the displayed **Directory** data picker list.

12.2.6. After the appropriate **Project Manager Lead** is selected, click OK in the lower right portion of the **Directory** data picker screen.

12.2.7. After OK is clicked in the **Directory** data picker screen, the **Demand Intake Summary** is populated with the Project Manager Lead selection. See figure PVD69.

Figure PVD69. Project Manager Lead complete (this section only).



12.2.8. The **Project Manager** field is prefilled.

12.2.9. Verify the information selected is correct.

12.2.10. After verification click Save & Complete in the lower right portion of the **Demand Intake Summary** screen.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel.

12.2.11. After Save & Complete is clicked in the **Demand Intake Summary** screen the **Concept / Analyze** screen is displayed.

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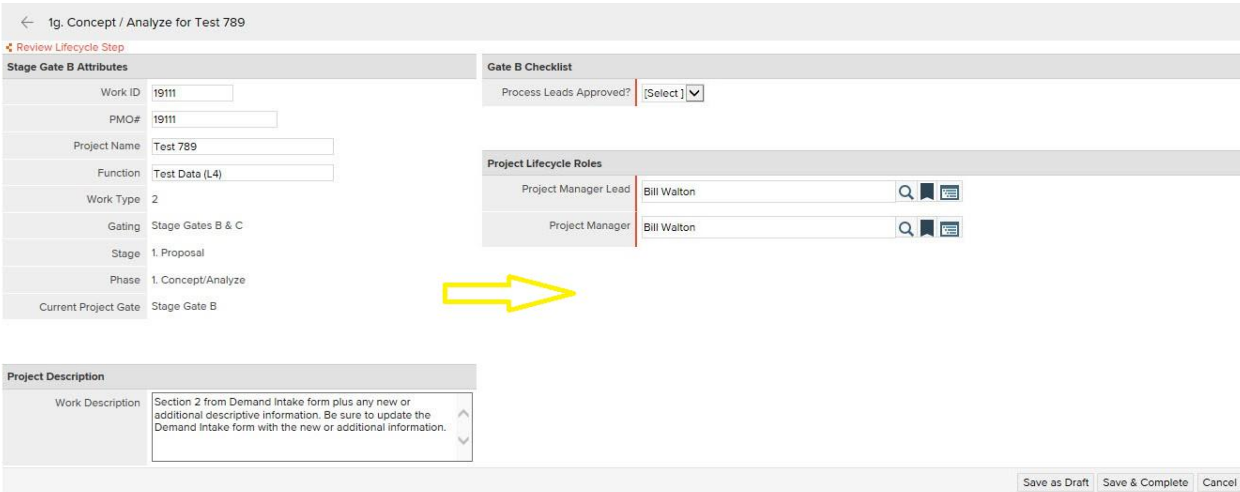
13. Concept / Analyze

Proposal stage- Proposal Managers

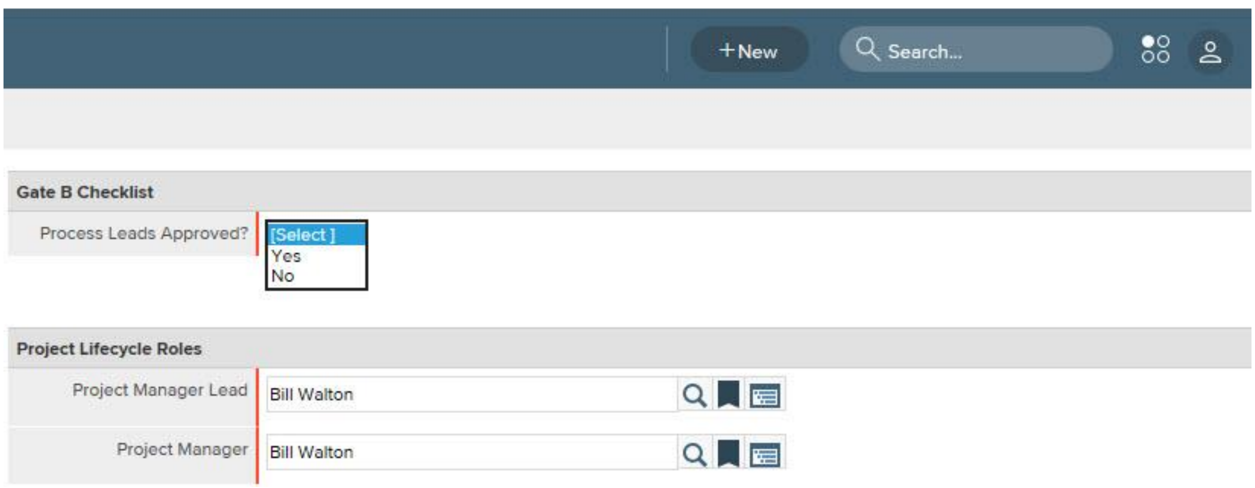
NOTE: The Concept / Analyze screen is a transitional tool for Planview. The workflow is moving toward Stage Gate B at this point in the workflow.

Figure PVD70. Concept / Analyze (modified horizontally compressed screen capture- the actual Planview screen is wider).



13.1. At the top of the right data column select a **Process Leads Approved?** response by clicking the down caret next to the **Process Leads Approved?** data selection field and clicking (the appropriate yes [or] no response) from the dropdown menu to select it. See figure PVD71.

Figure PVD71. Process Leads Approved? selection options (partial screen capture only).



NOTE: Project Manager Lead (and/or) Project Manager roles can be changed here under Project Lifecycle Roles if necessary.

13.2. Verify the information selected is correct.

13.3. After verification click Save & Complete in the lower right portion of the **Concept / Analyze** screen.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel.

13.4. After Save & Complete is clicked in the **Concept / Analyze** screen the **Scheduling: Create schedule** screen is displayed.

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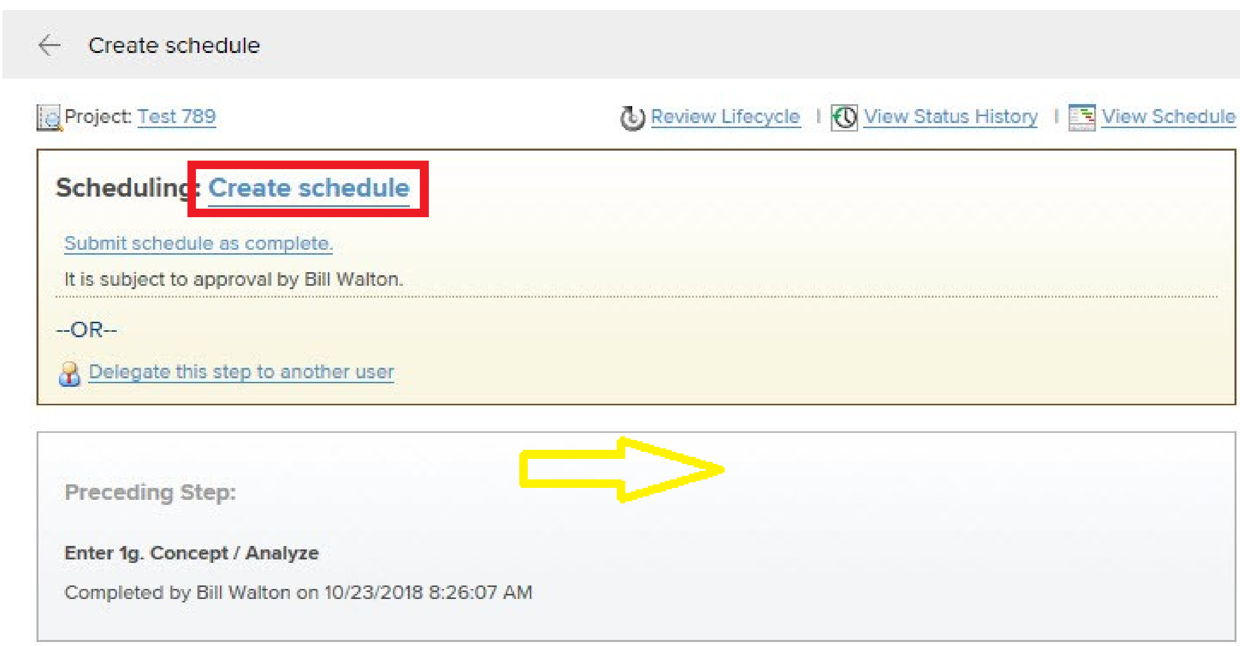
14. Stage Gate B Schedule and Financials

Proposal stage- Project Managers and Project Manager Leads

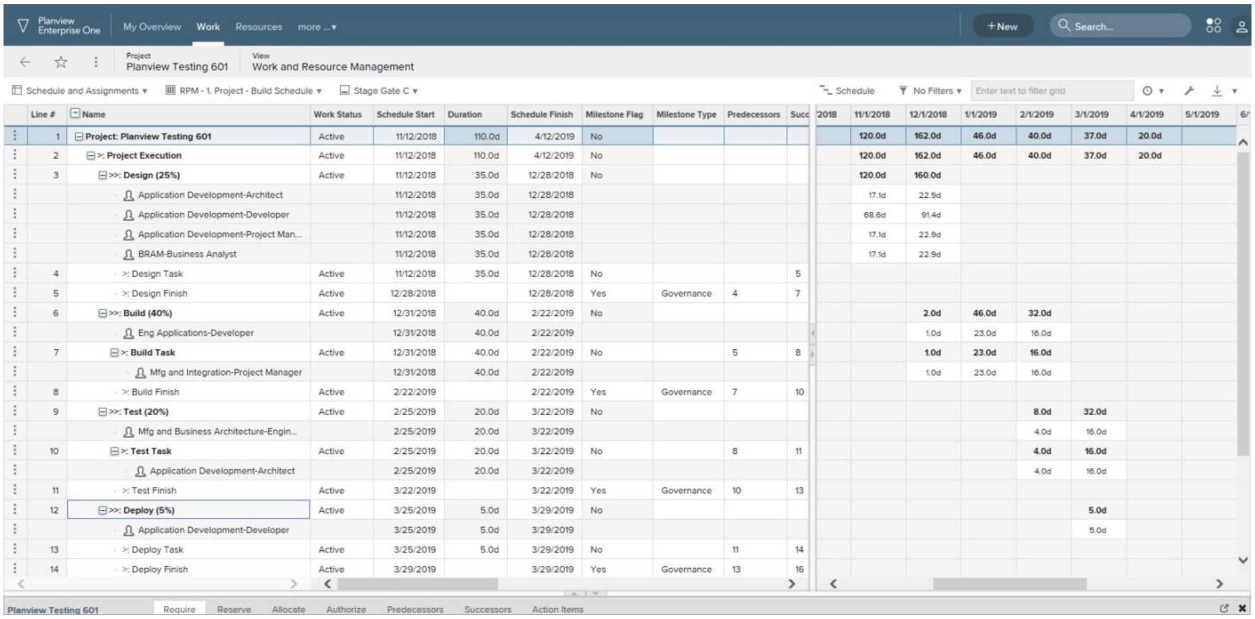
14.1. Click the Create schedule hyperlink in the **Scheduling: Create Schedule** dialog box. See figure PVD72.

Figure PVD72. Scheduling: Create schedule (modified horizontally compressed screen capture- the actual Planview screen is wider).



14.2. After the Create schedule hyperlink is clicked in the **Scheduling: Created schedule** screen the previously completed **Work and Resource Management** screen is displayed. See figure PVD73.

Figure PVD73. Work and Resource Management screen.



14.3. Verify that the previously entered schedule and resource information is still/currently complete and correct.

14.4. Adjust any data using the same procedures originally used to enter it.

NOTE: Only the non-shaded fields (white in the browser) are editable.

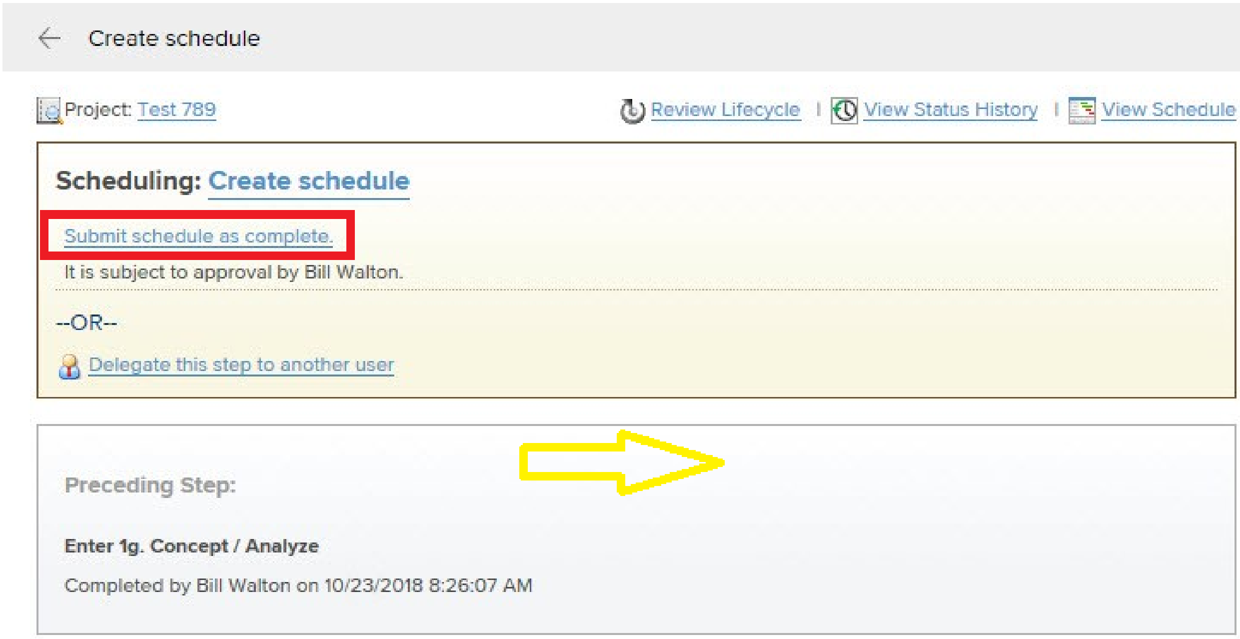
14.5. Click Schedule to save the data.

14.6. Click Close (**X**) in the upper right corner of the **Work and Resource Management** screen menu bar.

14.7. After Close is clicked in the **Work & Resource Management** the **Scheduling: Create Schedule** screen is displayed.

14.8. Click the Submit schedule as complete hyperlink in the **Scheduling: Create schedule** screen. See figure PVD74.

Figure PVD74. Submit schedule as complete (modified horizontally compressed screen capture- the actual Planview screen is wider).



14.9. After the Submit schedule as complete hyperlink is clicked in the **Schedule: Create schedule** screen the **Financial Planning Detail** screen is displayed. See figure PVD75.

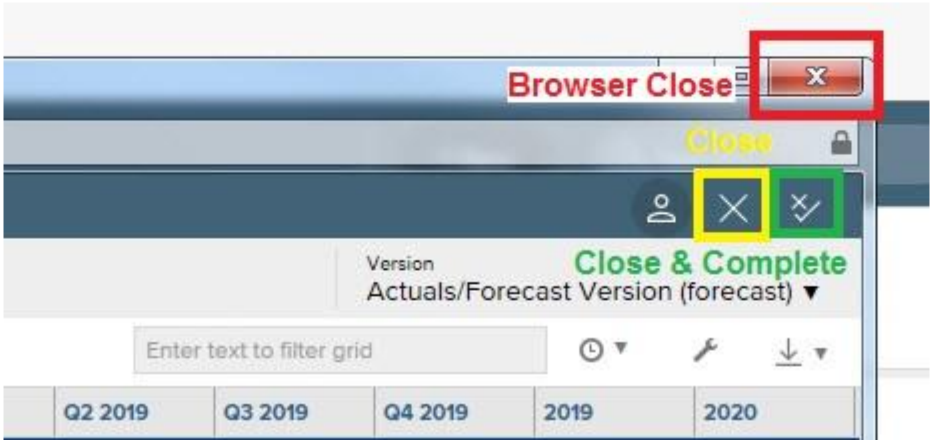
Figure PVD75. Financial Summary with CAPEX and OPEX entered (modified horizontally compressed screen capture- the actual Planview screen is wider).

14.10. Make any necessary adjustments/revisions as required.

14.11. Verify financials are complete and correct.

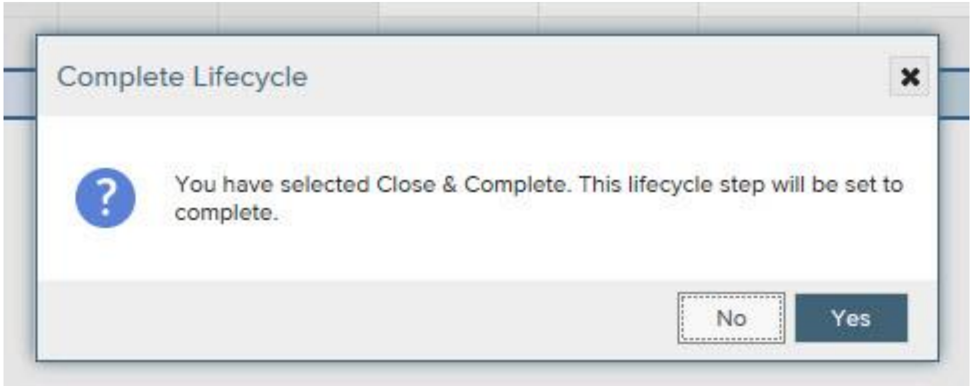
14.12. After verification click the Close & Complete icon (X with ✓underneath) in the upper right corner of the **Financial Planning Detail** menu bar. See figure PVD76.

Figure PVD76. Planvew Close & Complete icon in green, Planview Close icon in yellow, and browser close icon in red (partial screen capture of the upper right corner of the browser window only).



14.13. After Close & Complete is clicked in the **Financial Planning Detail** screen the **Complete Lifecycle** dialog box opens. See figure PVD77.

Figure PVD77. Complete Lifecycle dialog box.

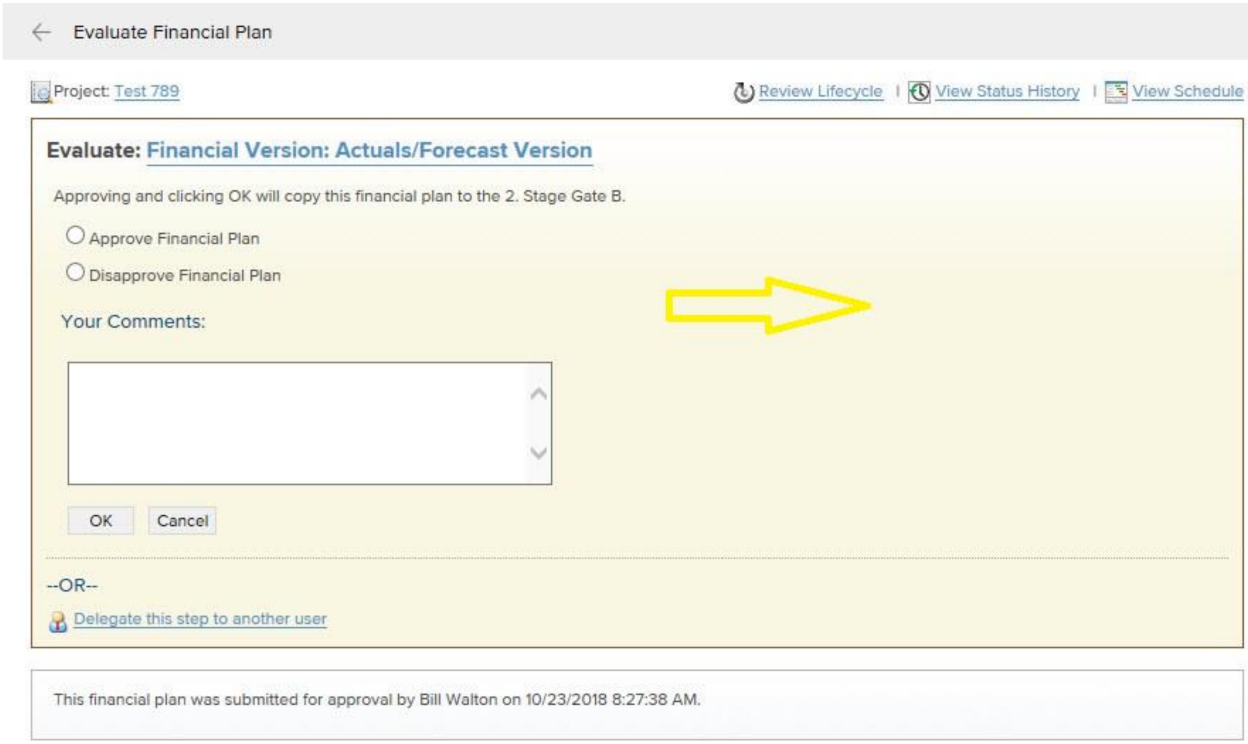


14.14. Click Yes in the **Complete Lifecycle** dialog box.

14.15. After Yes is clicked in the **Complete Lifecycle** dialog box the **Evaluate: Financial Version: Actuals/Forecast Version** for Stage Gate B screen is displayed. See figure PVD78.

NOTE: The Proposal Manager Lead is responsible for approval of schedules and financials.

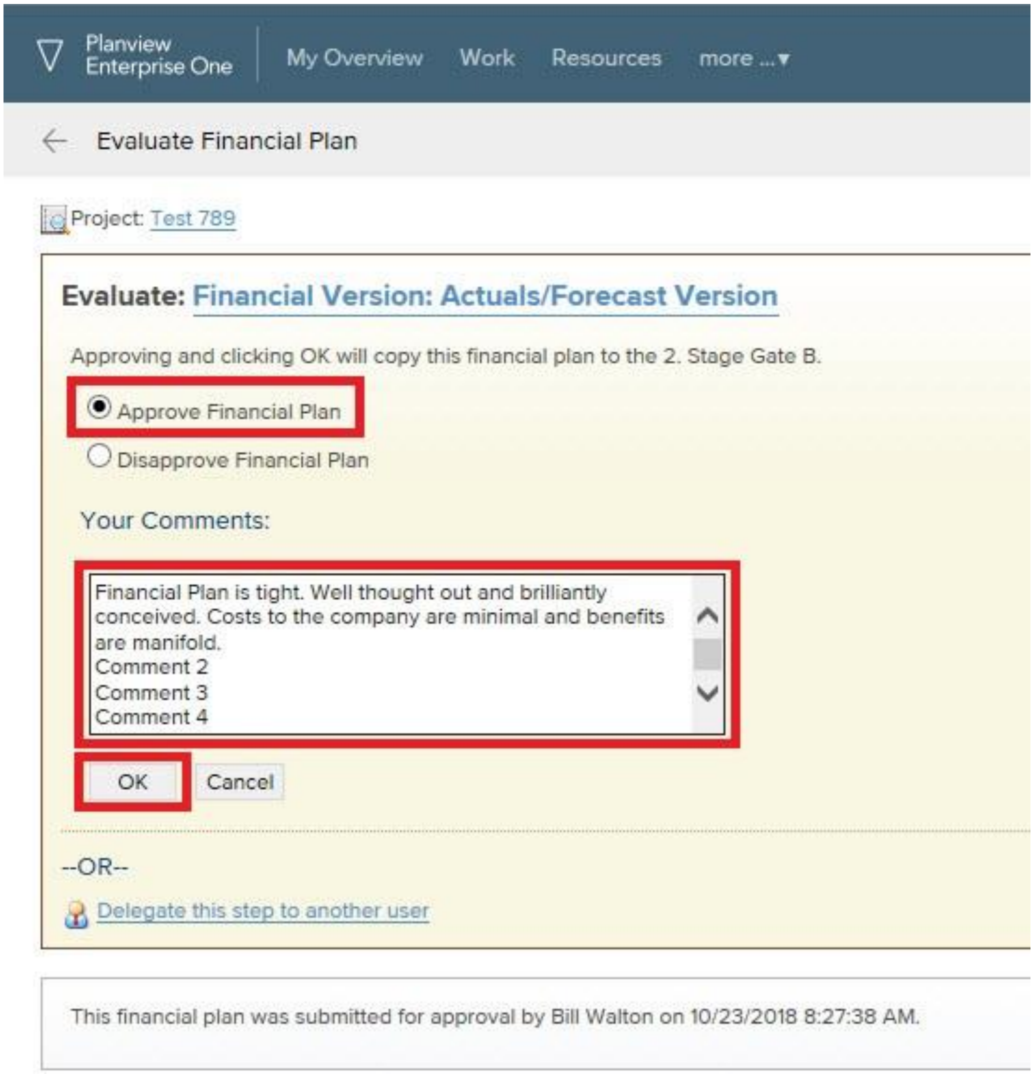
Figure PVD78. Evaluate Financial Plan (modified horizontally compressed screen capture- the actual Planview screen is wider).



14.16. Click the radio button next to **Approve Financial Plan** in the **Evaluate: Financial Version: Actuals/Forecast Version** screen.

14.17. Click in the **Your Comments** data entry field to enter (<u>whatever pertinent comments should accompany the project as it continues through the workflow</u>). See figure PVD79.

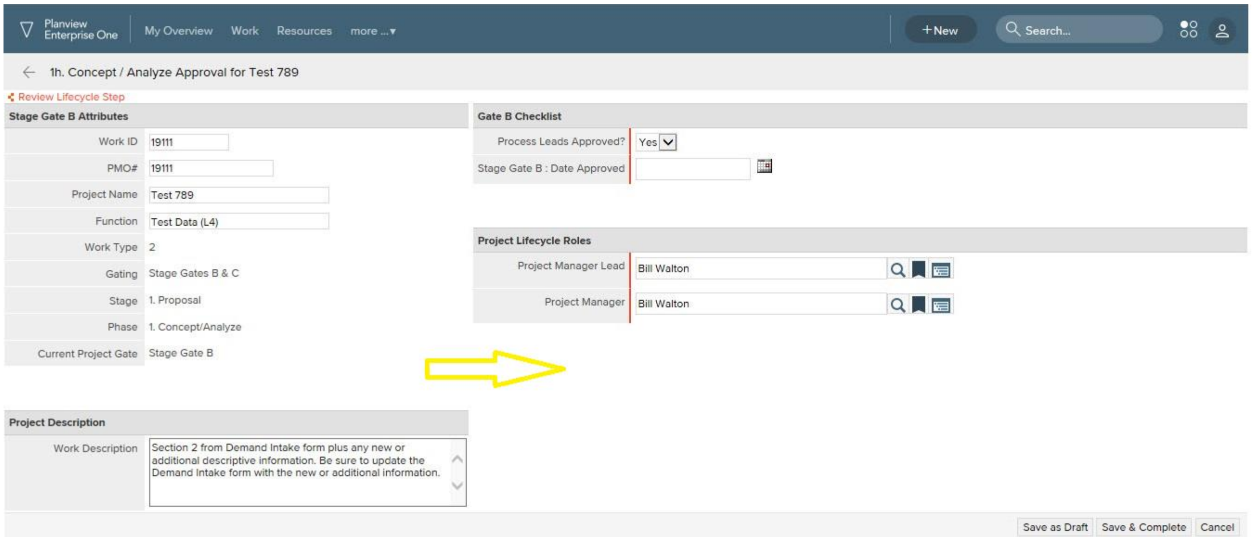
Figure PVD79. Completed Evaluate Financial Version Stage for Gate B.



14.18. Click OK below the **Your Comments** data entry field to approve the financial plan.

14.19. After OK is clicked in the **Evaluate: Financial Version: Actuals/Forecast Version** screen the **Concept / Analyze Approval** screen is displayed. See figure PVD80.

Figure PVD80. Concept / Analyze Approval (modified horizontally compressed screen capture- the actual Planview screen is wider).



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15. Concept / Analyze Approval

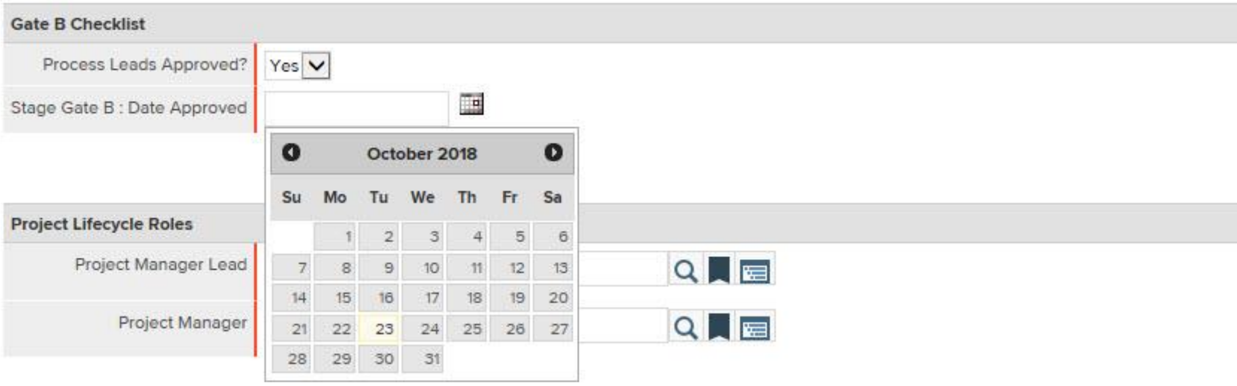
Proposal stage- Project Manager Leads

The Project Manager Lead is responsible for verification of the data displayed in the Concept / Analyze Approval screen.

NOTE: Project Manager Lead (and/or) Project Manager roles can be changed here under Project Lifecycle Roles if necessary

15.1. Near the top of the right data column select the **Stage Gate B : Date Approved** date by clicking the calendar launch icon next to the **Stage Gate B : Date Approved** data selection field and selecting (the date on which the Stage Gate B schedule was approved). See figure PVD81.

Figure PVD81. Stage Gate B : Date Approved (partial screen capture only).



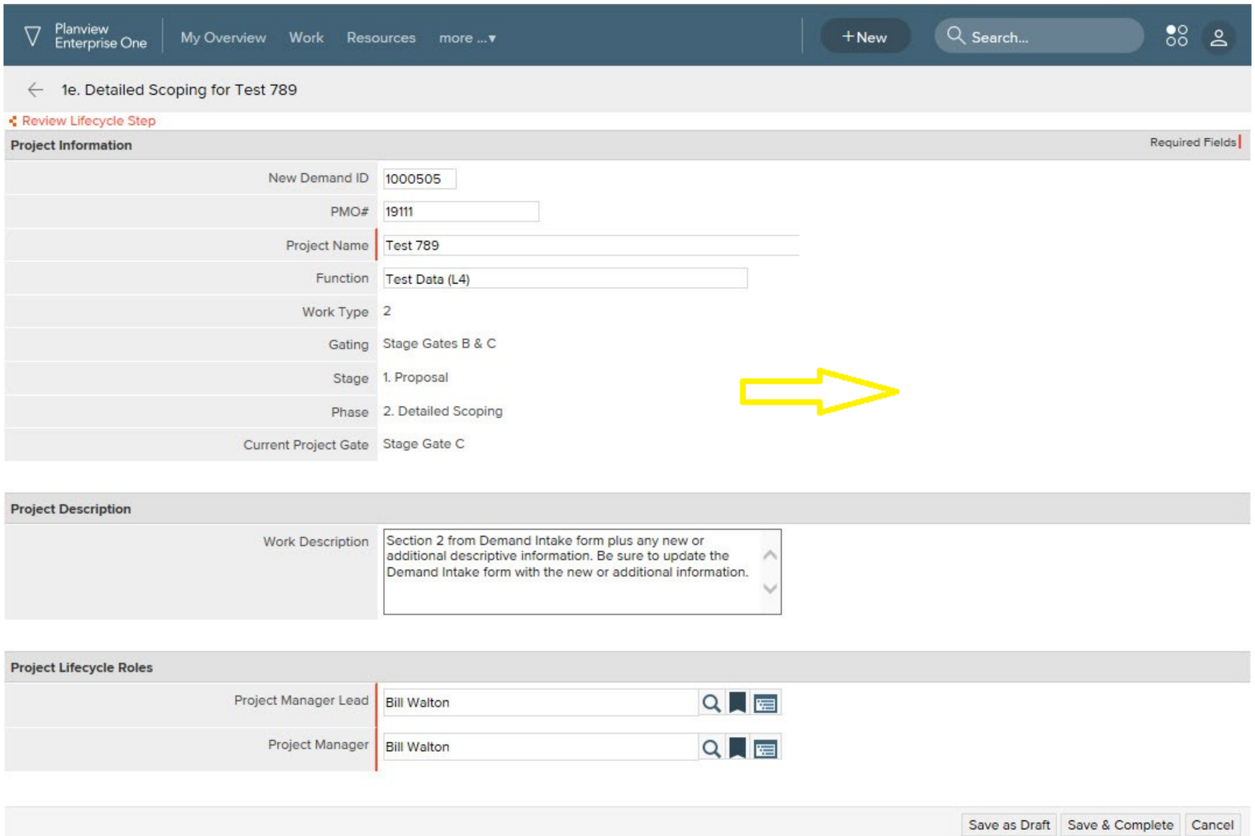
15.2. Verify the date selected is correct.

15.3. After verification click Save & Complete in the lower right portion of the **Concept / Analyze Approval** screen.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel.

15.4. After Save & Complete is clicked in the **Concept / Analyze Approval** screen the **Detailed Scoping** screen is displayed. See figure PVD82.

Figure PVD82. Detailed Scoping (modified horizontally compressed screen capture- the actual Planview screen is wider).



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16. Detailed Scoping

Proposal stage- Project Managers

NOTE: The Detailed Scoping screen is a transitional tool for Planview. The workflow is moving toward Stage Gate C at this point in the workflow.

NOTE: The Project Manager is responsible for Planview workflow tasks beyond this point in the workflow.

NOTE: Project Manager Lead (and/or) Project Manager roles can be changed here if necessary but no other new or revised information is required in the **Detailed Scoping** *screen.*

16.1. Verify the information displayed on the **Detailed Scoping** page is complete and correct.

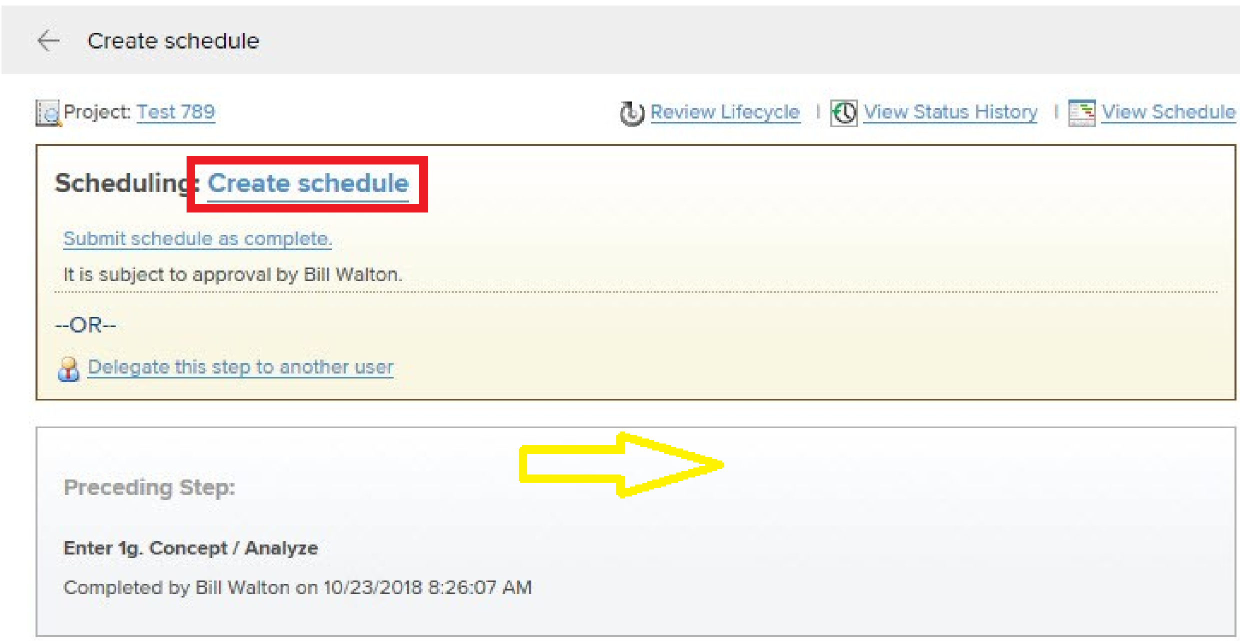
16.2. After verification click Save & Complete in the lower right portion of the **Detailed Scoping** screen.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel.

16.3. After Save & Complete is clicked in the **Detailed Scoping** screen the **Scheduling: Create schedule** screen is displayed.

16.4. Click the Create Schedule hyperlink in the **Scheduling: Create schedule** screen. See figure PVD83.

Figure PVD83. Scheduling: Create schedule (modified horizontally compressed screen capture- the actual Planview screen is wider).



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17. Stage Gate C Schedule and Financials

Proposal stage- Project Managers and Project Manager Leads

NOTE: At this point in the workflow Resources (actual personnel) are assigned to the Roles (jobs) previously assigned to the project during Stage Gate A scheduling [section 9](#).

NOTE: The Project Manager assigning Resources (people) to Project Roles (jobs) in preparation for Stage Gate C approval should be familiar with the Resources being assigned and should verify Resource availability with the appropriate line managers.

17.1. After the Create schedule hyperlink in the **Scheduling: Create schedule** screen is clicked the previously completed **Work and Resource Management** screen is displayed.

17.2. If the **Schedule and Assignments** version of the **Work and Resource Management** screen is not displayed, click the down caret next to the view option and select **Schedule and Assignments** from the listed options to select it. See figures PVD84 and PVD85.

Figure PVD84. Work and Resource Management screen (partial screen capture only).

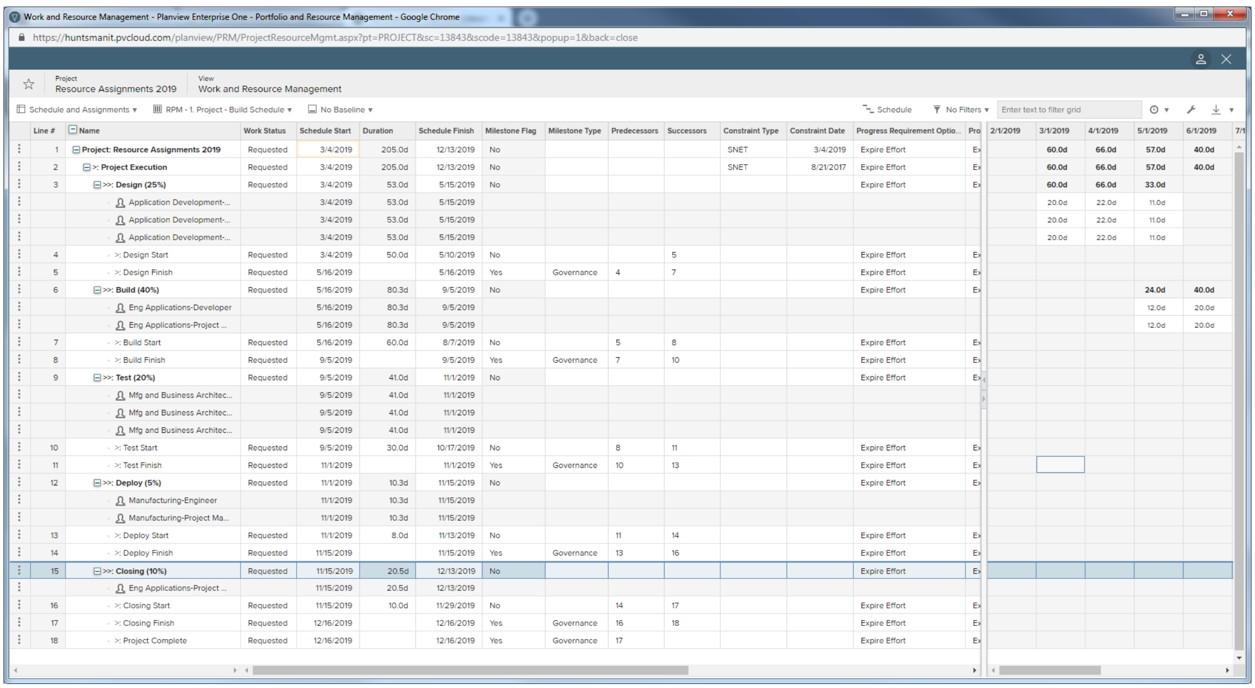
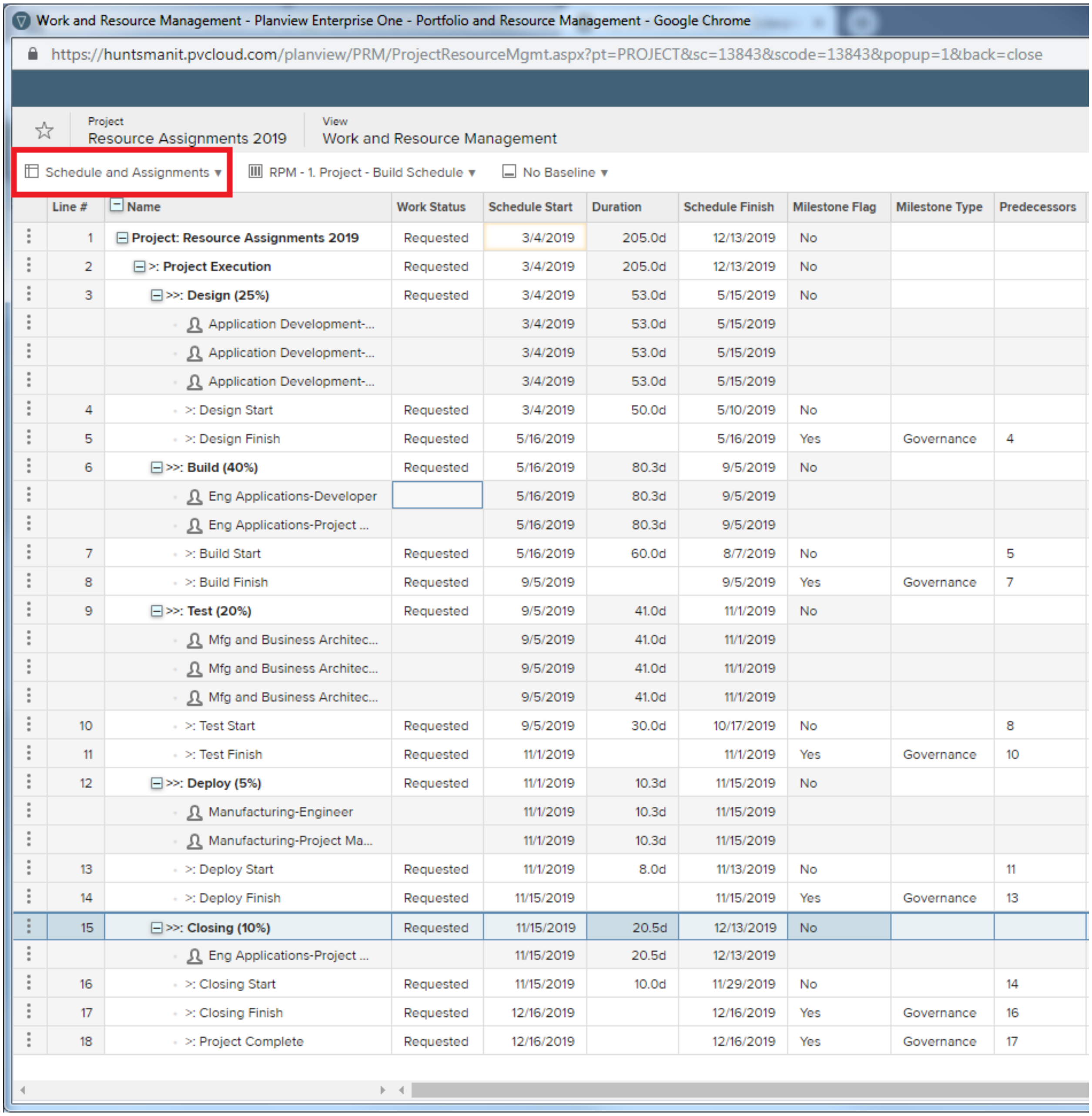


Figure PVD85. Detail view of Work and Resource management screen showing Schedule and Assignments (partial screen capture only).

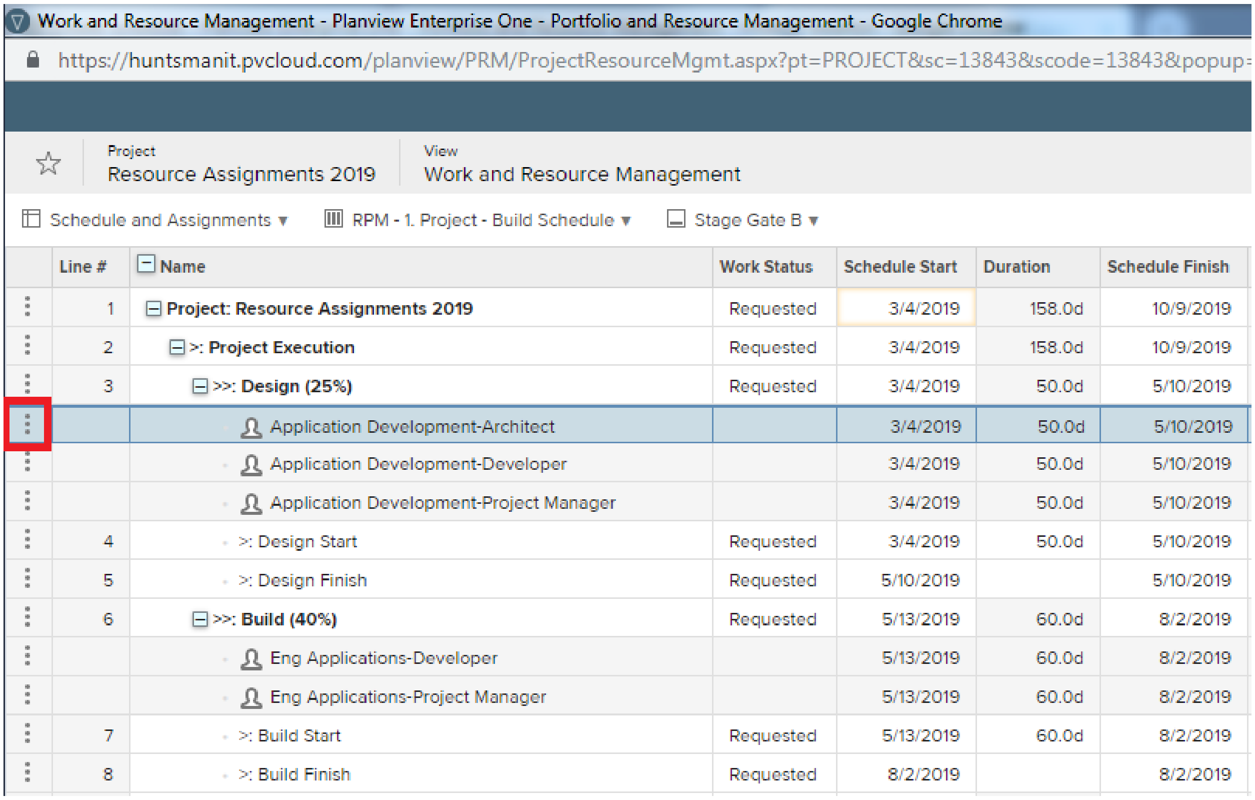


Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish	Milestone Flag	Milestone Type	Predecessors
1	Project: Resource Assignments 2019	Requested	3/4/2019	205.0d	12/13/2019	No		
2	>: Project Execution	Requested	3/4/2019	205.0d	12/13/2019	No		
3	>>: Design (25%)	Requested	3/4/2019	53.0d	5/15/2019	No		
	Application Development-...		3/4/2019	53.0d	5/15/2019			
	Application Development-...		3/4/2019	53.0d	5/15/2019			
	Application Development-...		3/4/2019	53.0d	5/15/2019			
4	>: Design Start	Requested	3/4/2019	50.0d	5/10/2019	No		
5	>: Design Finish	Requested	5/16/2019		5/16/2019	Yes	Governance	4
6	>>: Build (40%)	Requested	5/16/2019	80.3d	9/5/2019	No		
	Eng Applications-Developer		5/16/2019	80.3d	9/5/2019			
	Eng Applications-Project ...		5/16/2019	80.3d	9/5/2019			
7	>: Build Start	Requested	5/16/2019	60.0d	8/7/2019	No		5
8	>: Build Finish	Requested	9/5/2019		9/5/2019	Yes	Governance	7
9	>>: Test (20%)	Requested	9/5/2019	41.0d	11/1/2019	No		
	Mfg and Business Architec...		9/5/2019	41.0d	11/1/2019			
	Mfg and Business Architec...		9/5/2019	41.0d	11/1/2019			
	Mfg and Business Architec...		9/5/2019	41.0d	11/1/2019			
10	>: Test Start	Requested	9/5/2019	30.0d	10/17/2019	No		8
11	>: Test Finish	Requested	11/1/2019		11/1/2019	Yes	Governance	10
12	>>: Deploy (5%)	Requested	11/1/2019	10.3d	11/15/2019	No		
	Manufacturing-Engineer		11/1/2019	10.3d	11/15/2019			
	Manufacturing-Project Ma...		11/1/2019	10.3d	11/15/2019			
13	>: Deploy Start	Requested	11/1/2019	8.0d	11/13/2019	No		11
14	>: Deploy Finish	Requested	11/15/2019		11/15/2019	Yes	Governance	13
15	>>: Closing (10%)	Requested	11/15/2019	20.5d	12/13/2019	No		
	Eng Applications-Project ...		11/15/2019	20.5d	12/13/2019			
16	>: Closing Start	Requested	11/15/2019	10.0d	11/29/2019	No		14
17	>: Closing Finish	Requested	12/16/2019		12/16/2019	Yes	Governance	16
18	>: Project Complete	Requested	12/16/2019		12/16/2019	Yes	Governance	17

17.3. Adjust any scheduling data using the same procedures originally used to enter it in section 8.

17.4. Click the Action Menu icon next to the first **Role** to which a **Resource** is to be assigned. See figure PVD86.

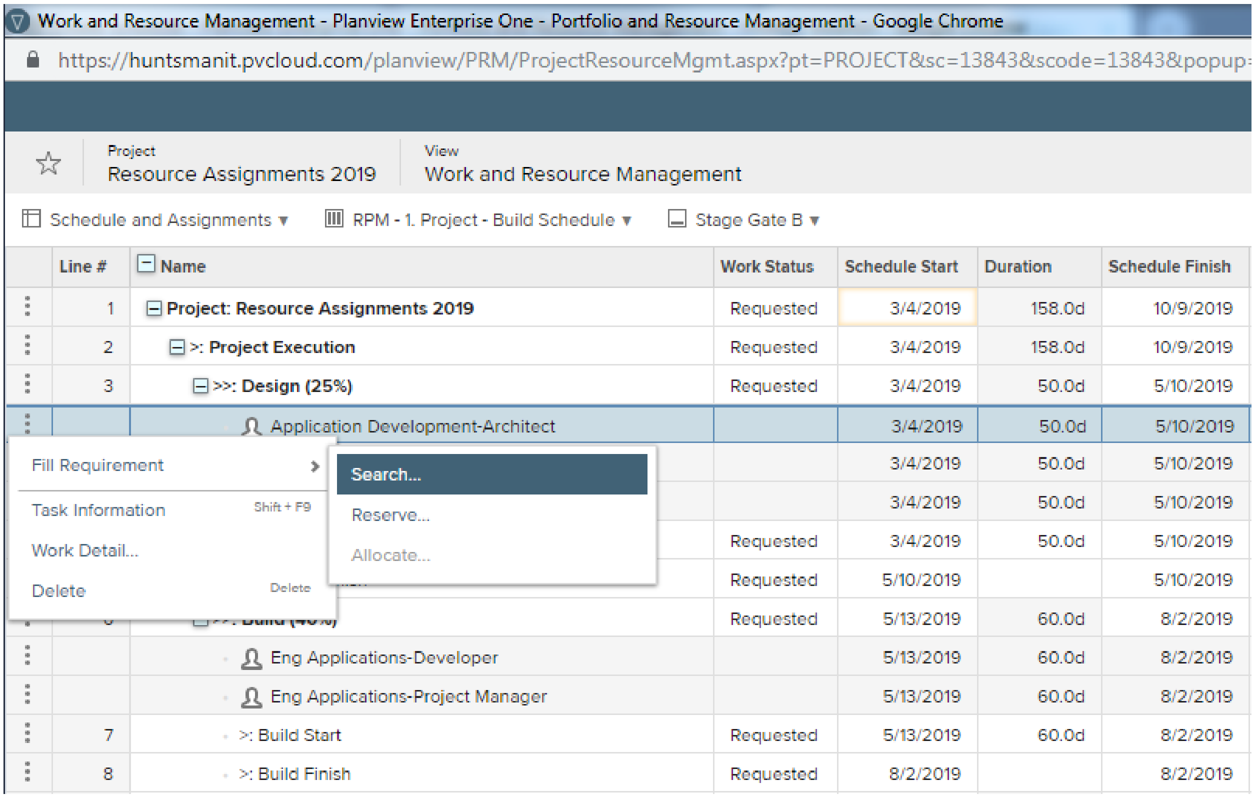
Figure PVD86. Action Menu icon next to Role (partial screen capture only).



Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish
1	**Project: Resource Assignments 2019**	Requested	3/4/2019	158.0d	10/9/2019
2	**>: Project Execution**	Requested	3/4/2019	158.0d	10/9/2019
3	**>>: Design (25%)**	Requested	3/4/2019	50.0d	5/10/2019
	Application Development-Architect		3/4/2019	50.0d	5/10/2019
	Application Development-Developer		3/4/2019	50.0d	5/10/2019
	Application Development-Project Manager		3/4/2019	50.0d	5/10/2019
4	>: Design Start	Requested	3/4/2019	50.0d	5/10/2019
5	>: Design Finish	Requested	5/10/2019		5/10/2019
6	**>>: Build (40%)**	Requested	5/13/2019	60.0d	8/2/2019
	Eng Applications-Developer		5/13/2019	60.0d	8/2/2019
	Eng Applications-Project Manager		5/13/2019	60.0d	8/2/2019
7	>: Build Start	Requested	5/13/2019	60.0d	8/2/2019
8	>: Build Finish	Requested	8/2/2019		8/2/2019

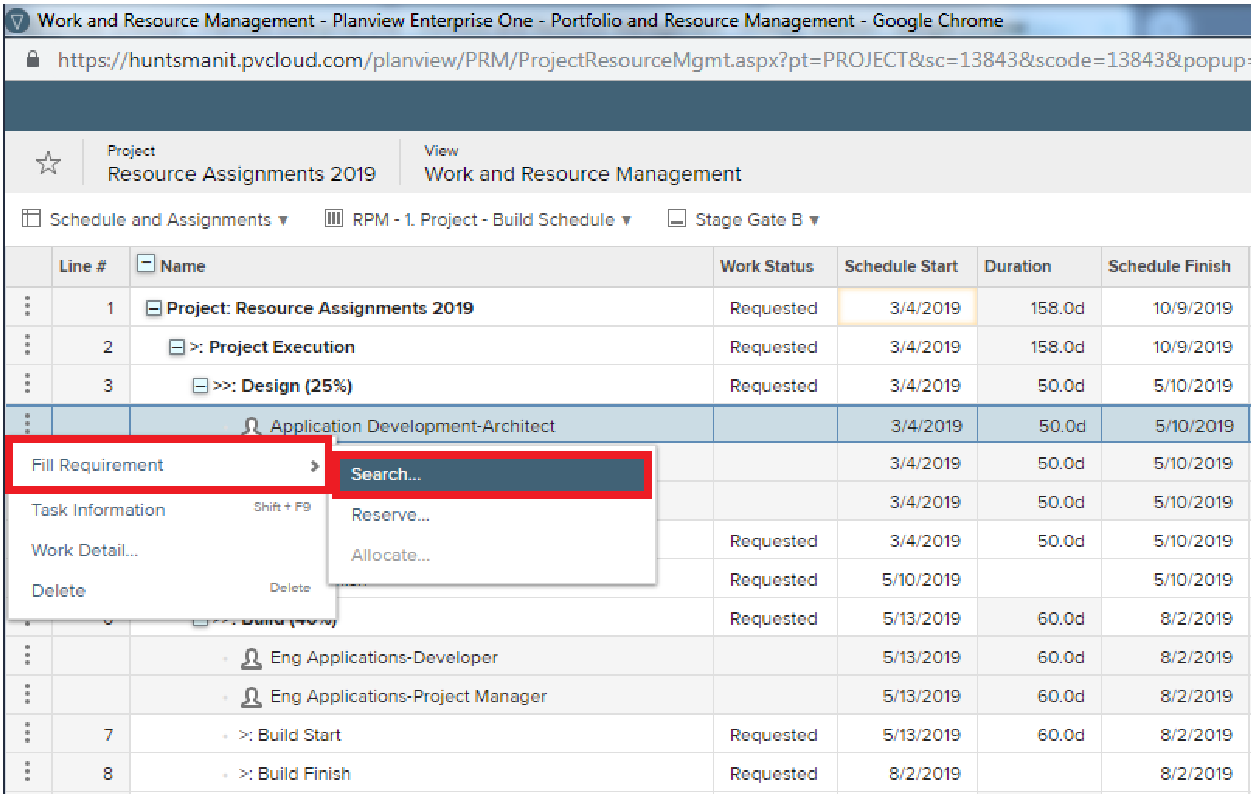
17.5. The **Action Menu** for the **Role** is displayed See figure PVD87.

Figure PVD87. Role Action Menu (partial screen capture only).



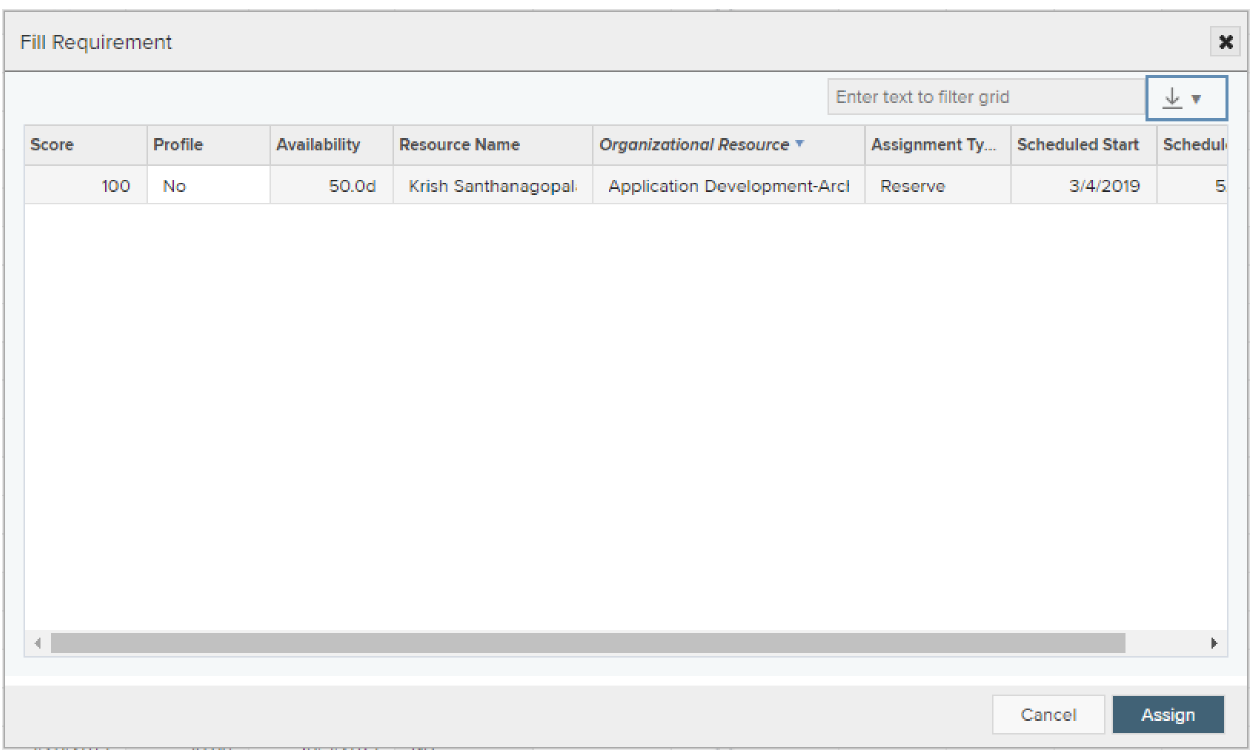
17.6. Select Fill Requirement and Search form the **Action Menu**. See figure PVD88.

Figure PVD88. Fill Requirement and Search in the Action Menu (partial screen capture only).



17.7. A **Fill Requirement** dialog box is displayed. See figure PVD89.

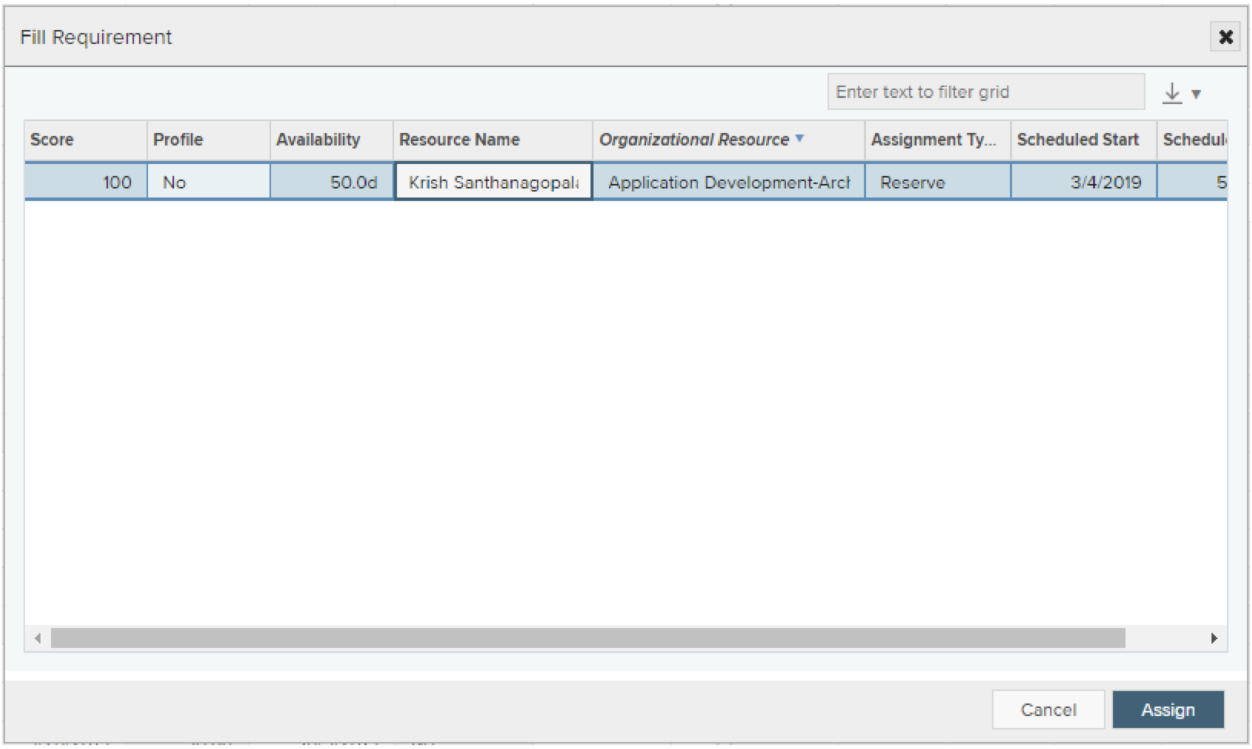
Figure PVD89. Fill Requirement dialog box (partial screen capture only).



17.8. Click the resource name on the line listing in the **Fill Requirement** dialog box to select it. See figure PVD90.

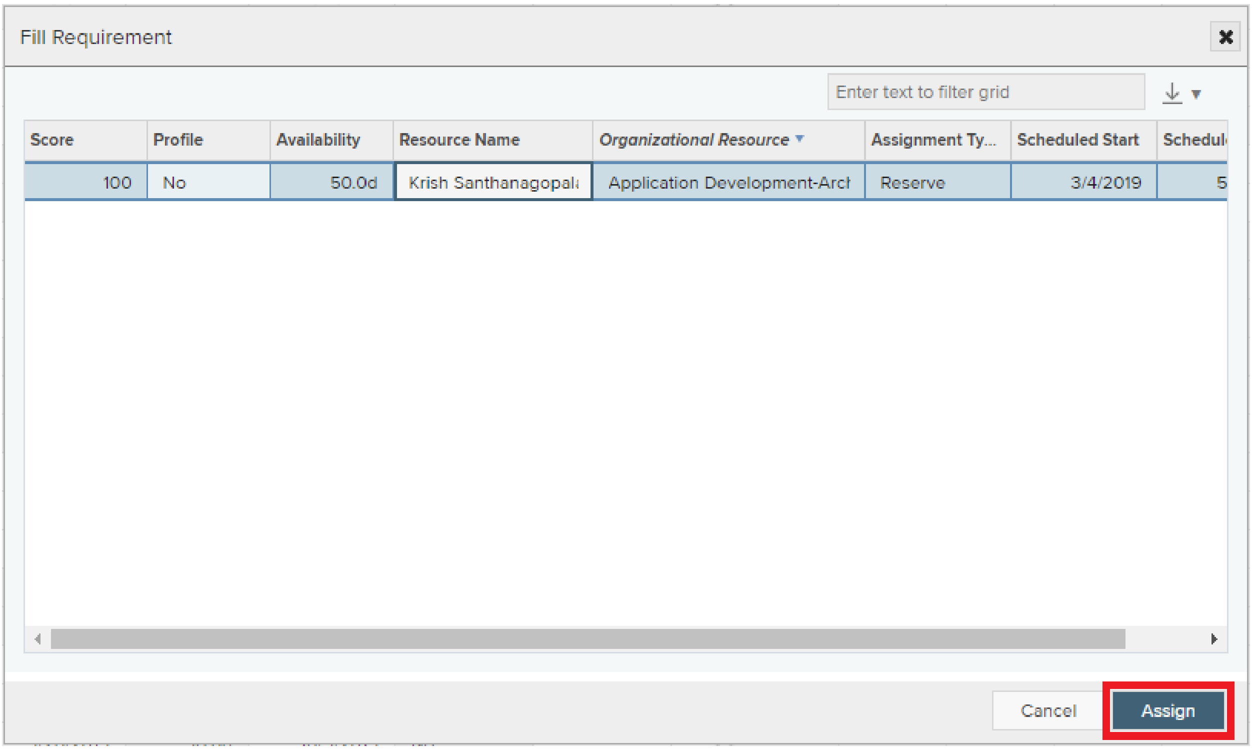
NOTE: The appearance of the Fill Requirement dialog box will vary by the Role to which a Resource is being assigned.

Figure PVD90. Fill Requirement dialog box with resource selected (partial screen capture only).



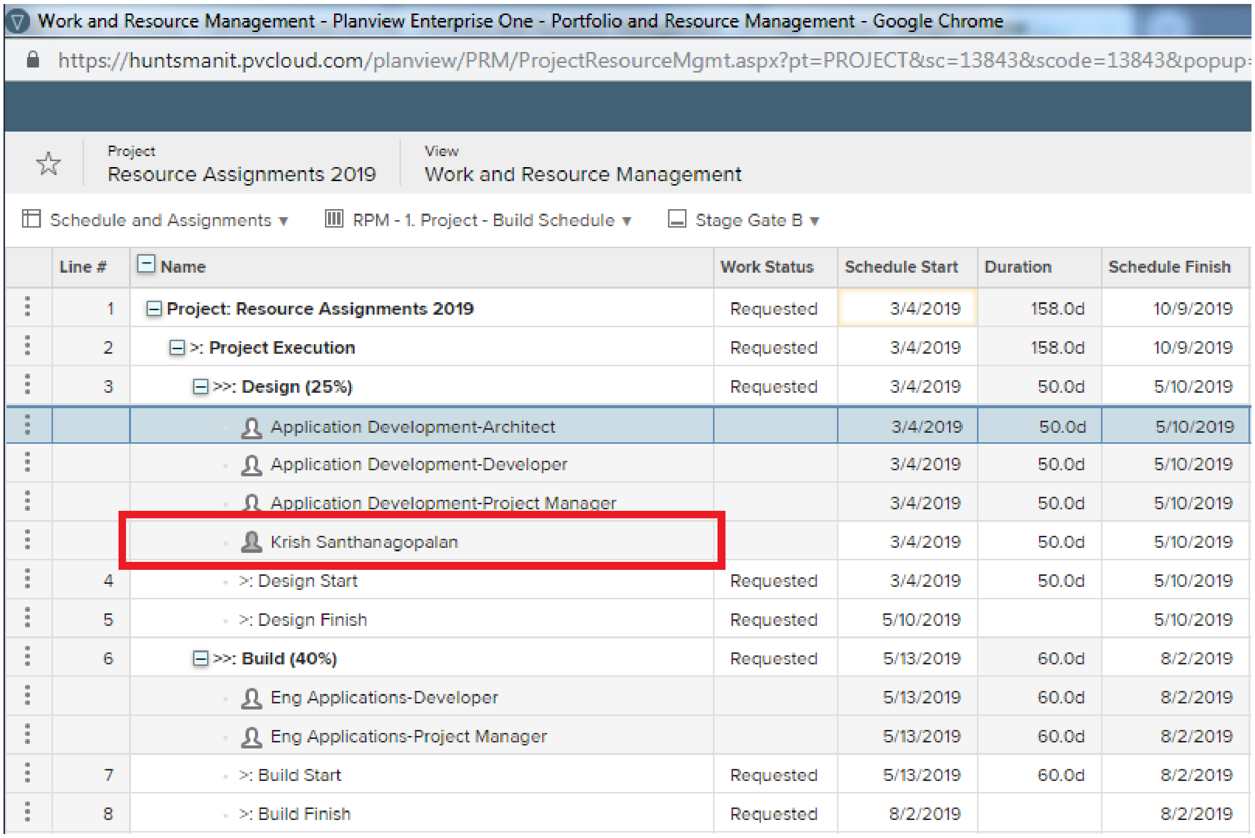
17.9. Click Assign in the lower right corner of the **Fill Requirement** dialog box to assign (the selected Resource) to the **Role**. See figure PVD91.

Figure PVD91. Assign button in the Fill Requirement dialog box (partial screen capture only).



17.10. After Assign is clicked in the **Fill Requirement** dialog box the **Resource** appears under the **Phase** to which it was assigned in the **Work and Resource Management** screen. See figure PVD92.

Figure PVD92. Resource assigned in the Work and Resource Management screen (partial screen capture only).



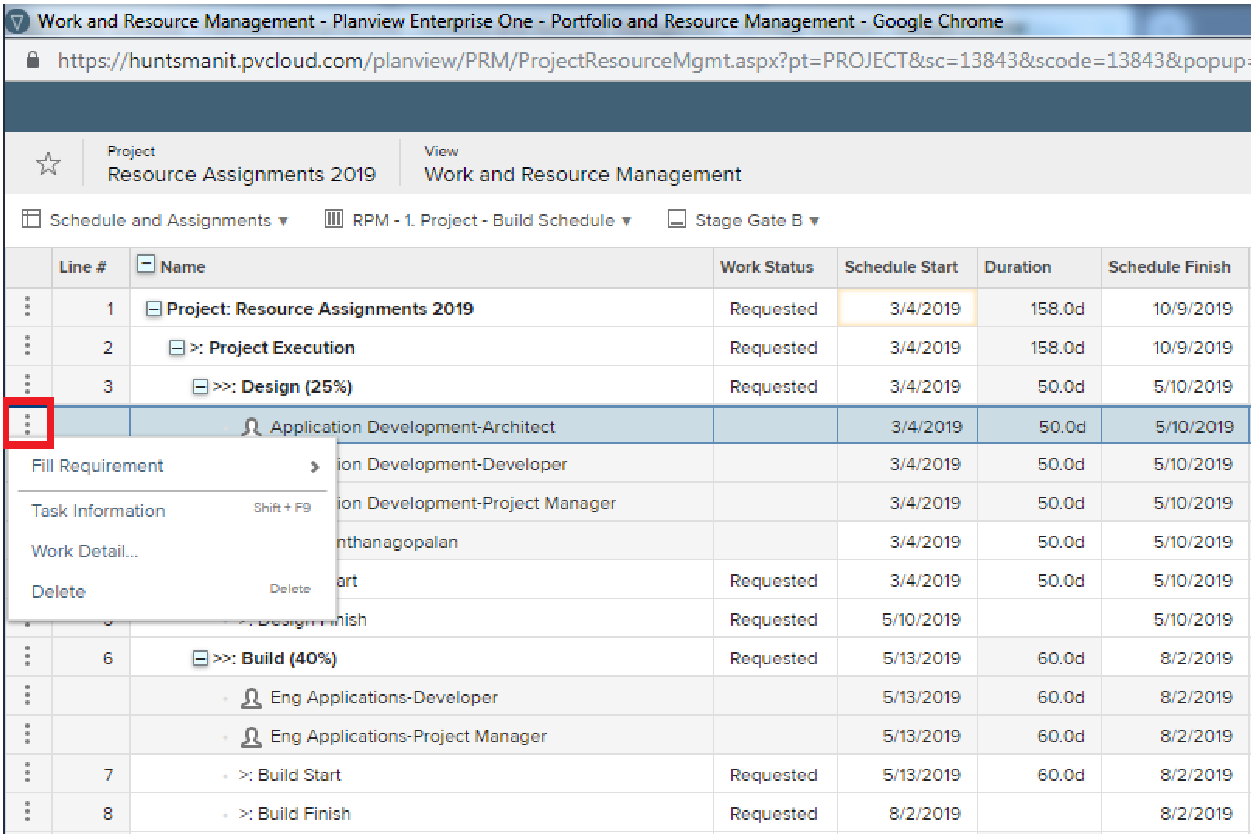
Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish
1	Project: Resource Assignments 2019	Requested	3/4/2019	158.0d	10/9/2019
2	>: Project Execution	Requested	3/4/2019	158.0d	10/9/2019
3	>>: Design (25%)	Requested	3/4/2019	50.0d	5/10/2019
	Application Development-Architect		3/4/2019	50.0d	5/10/2019
	Application Development-Developer		3/4/2019	50.0d	5/10/2019
	Application Development-Project Manager		3/4/2019	50.0d	5/10/2019
	Krish Santhanagopalan		3/4/2019	50.0d	5/10/2019
4	>: Design Start	Requested	3/4/2019	50.0d	5/10/2019
5	>: Design Finish	Requested	5/10/2019		5/10/2019
6	>>: Build (40%)	Requested	5/13/2019	60.0d	8/2/2019
	Eng Applications-Developer		5/13/2019	60.0d	8/2/2019
	Eng Applications-Project Manager		5/13/2019	60.0d	8/2/2019
7	>: Build Start	Requested	5/13/2019	60.0d	8/2/2019
8	>: Build Finish	Requested	8/2/2019		8/2/2019

17.11. Verify that the **Resource** assigned to the **Role** is correct.

17.12. Click the Action Menu next to the **Role** to which the **Resource** is now assigned.

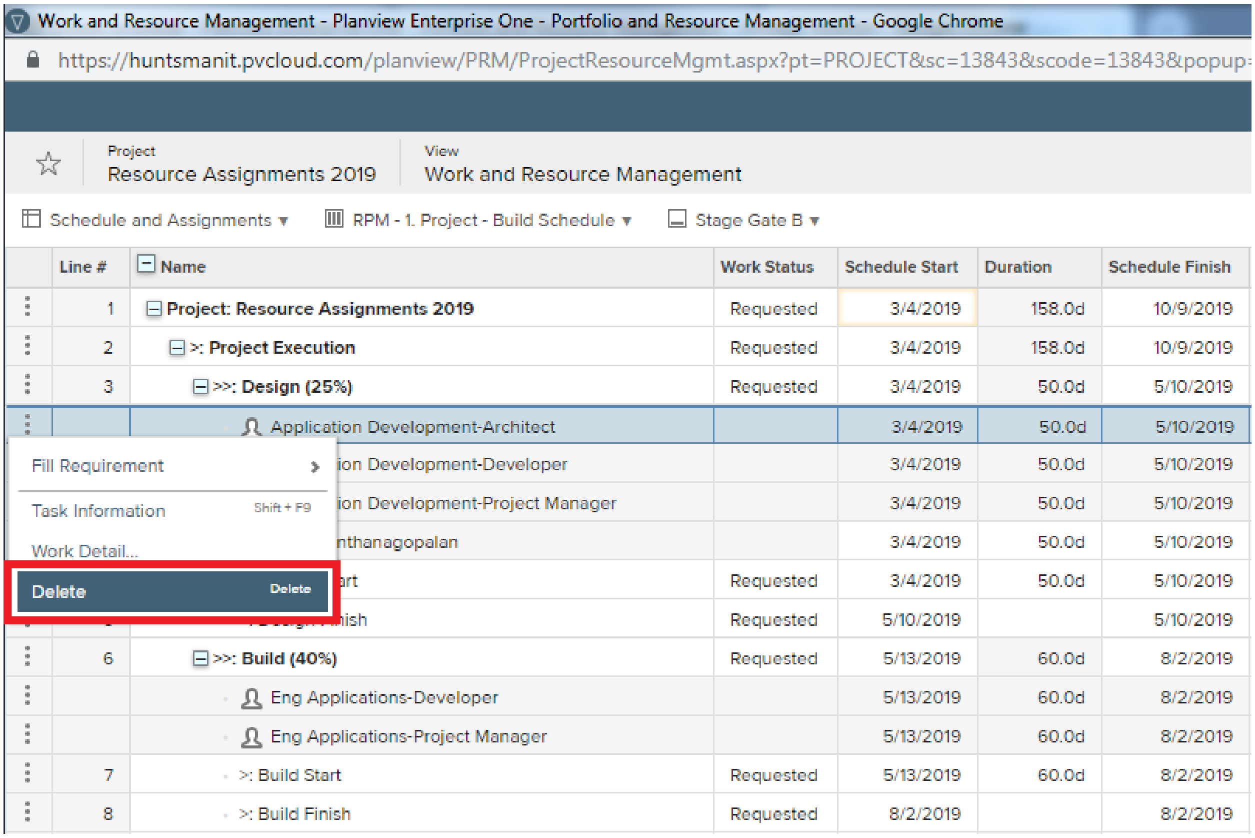
17.13. The **Action Menu** for the selected **Role** is displayed See figure PVD93.

Figure PVD93. Action Menu for Role (partial screen capture only).



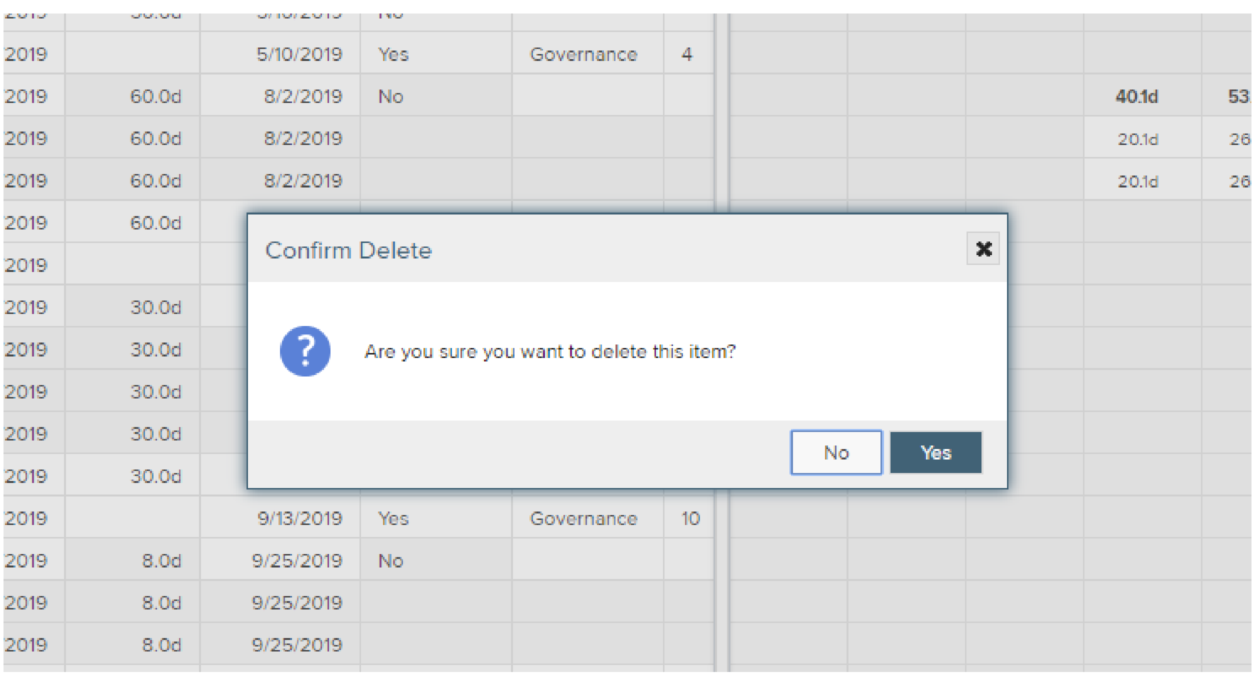
17.14. Select Delete from **the Action Menu** for the **Role** to which the **Resource** is now assigned. See figure PVD94.

Figure PVD94. Delete in the Role Action Menu (partial screen capture only).



17.15. After Delete is selected in the **Action Menu** for the **Role** to which the **Resource** is now assigned a **Confirm Delete** dialog box is displayed. See figure PVD95.

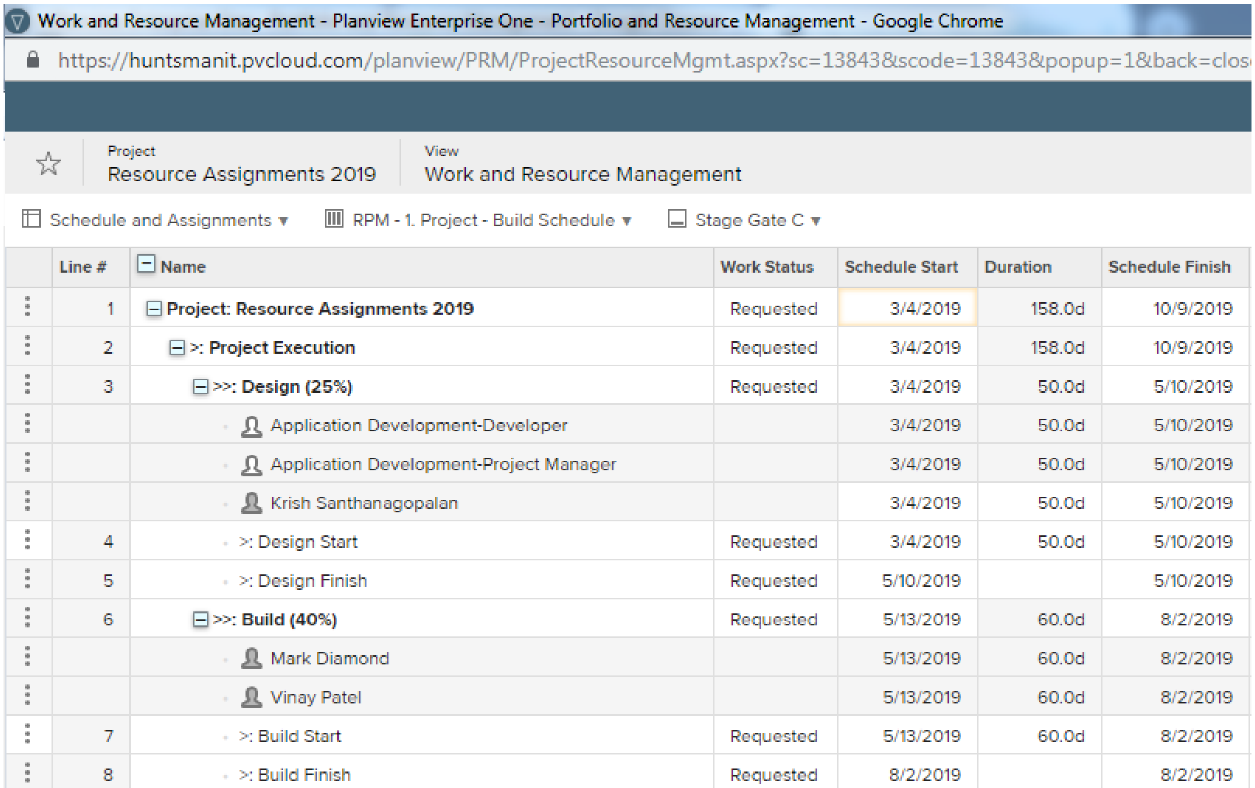
Figure PVD95. Confirm Delete dialog box (partial screen capture only).



17.16. Click Yes in the **Confirm Delete** dialog box to continue.

17.17. After Yes is clicked in the **Confirm Delete** dialog box the **Role** is removed from the **Work and Resource Management** screen, leaving the **Resource** assigned to that **Role** only. See figure PVD96.

Figure PVD96. Work and Resource Management screen with Resource displayed and Role removed (partial screen capture only).


Work and Resource Management - Planview Enterprise One - Portfolio and Resource Management - Google Chrome

https://huntsmanit.pvcloud.com/planview/PRM/ProjectResourceMgmt.aspx?sc=13843&scode=13843&popup=1&back=clos

Project
Resource Assignments 2019

View
Work and Resource Management

Schedule and Assignments ▾ RPM - 1. Project - Build Schedule ▾ Stage Gate C ▾

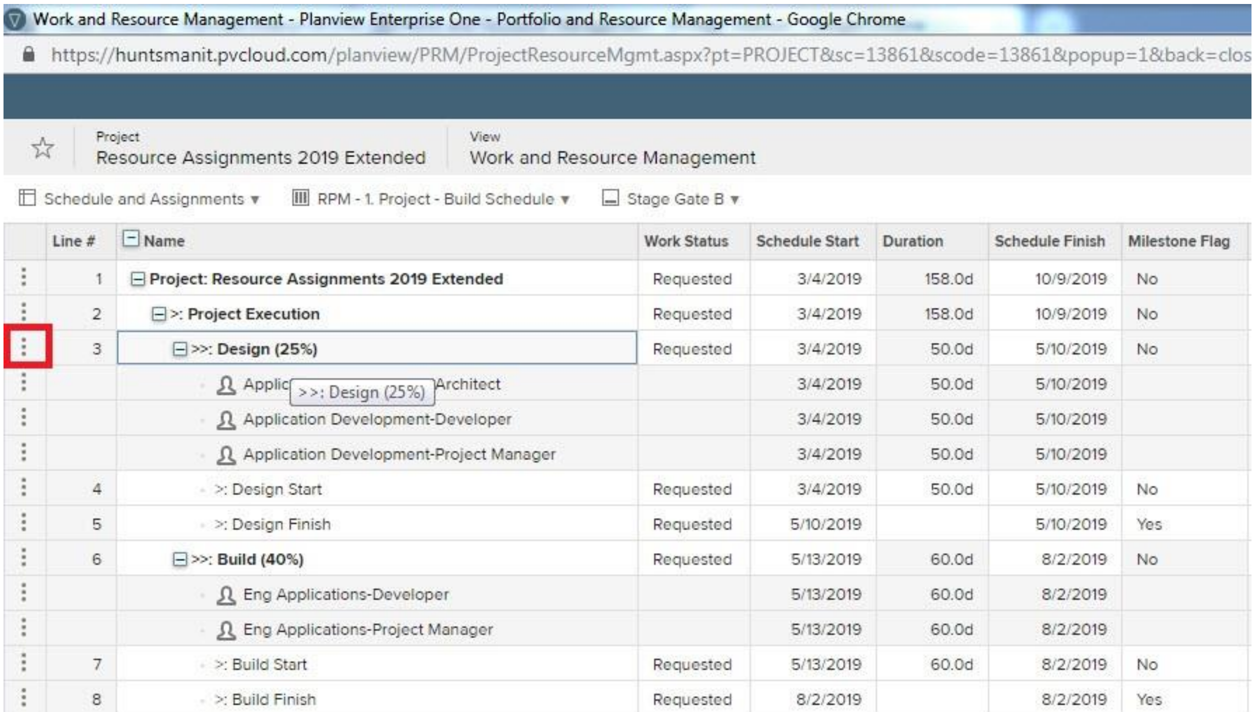
Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish
1	**Project: Resource Assignments 2019**	Requested	3/4/2019	158.0d	10/9/2019
2	**>: Project Execution**	Requested	3/4/2019	158.0d	10/9/2019
3	**>>: Design (25%)**	Requested	3/4/2019	50.0d	5/10/2019
	Application Development-Developer		3/4/2019	50.0d	5/10/2019
	Application Development-Project Manager		3/4/2019	50.0d	5/10/2019
	Krish Santhanagopalan		3/4/2019	50.0d	5/10/2019
4	>: Design Start	Requested	3/4/2019	50.0d	5/10/2019
5	>: Design Finish	Requested	5/10/2019		5/10/2019
6	**>>: Build (40%)**	Requested	5/13/2019	60.0d	8/2/2019
	Mark Diamond		5/13/2019	60.0d	8/2/2019
	Vinay Patel		5/13/2019	60.0d	8/2/2019
7	>: Build Start	Requested	5/13/2019	60.0d	8/2/2019
8	>: Build Finish	Requested	8/2/2019		8/2/2019

17.18. **Repeat** steps 17.3 through 17.16 to assign **Resources** to each **Role** in the **Work and Resource Management** screen (and) remove the **Roles** to which the **Resources** were assigned.

NOTE: If the Resource Role is not deleted after a named Resource is assigned to the Resource Role the reported resource requirements for the project will be doubled.

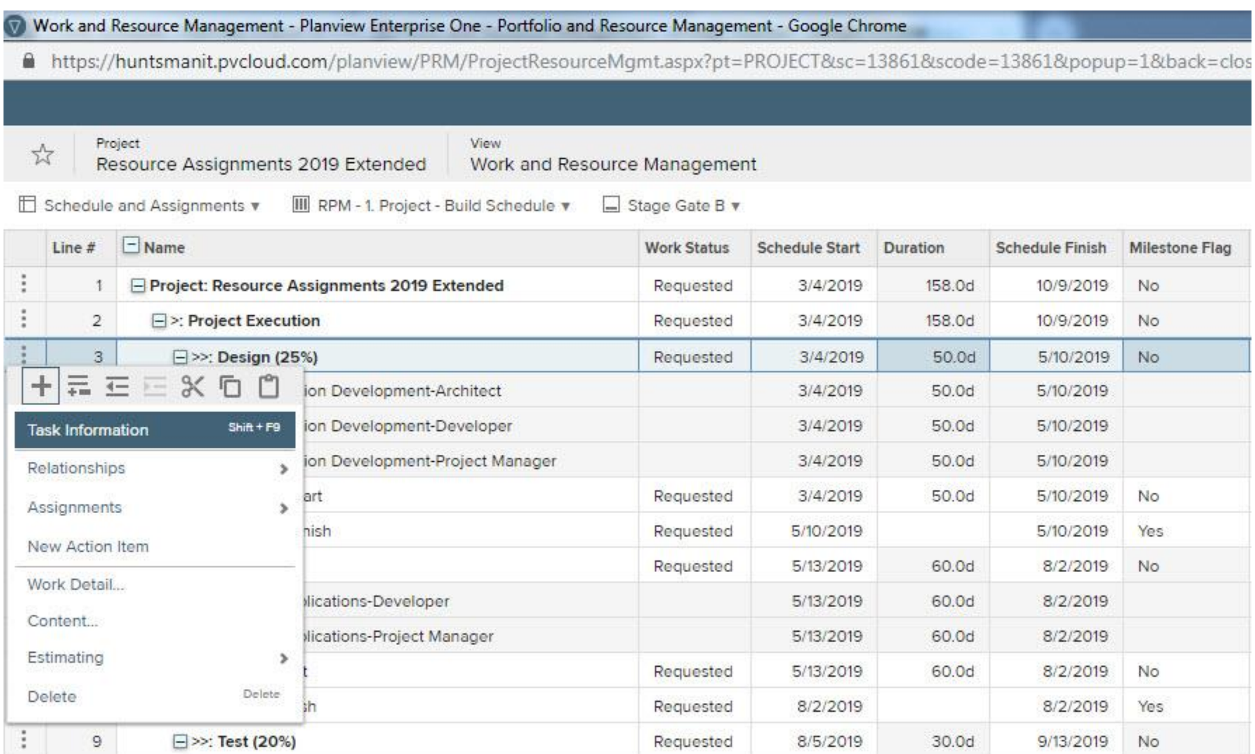
17.19. Click the Action Menu icon next to the **Design Phase** of the **Project**. See figure PVD97. See figure PVD97.

Figure PVD97. Action Menu Icon for the Design Phase of the Project (partial screen capture only).



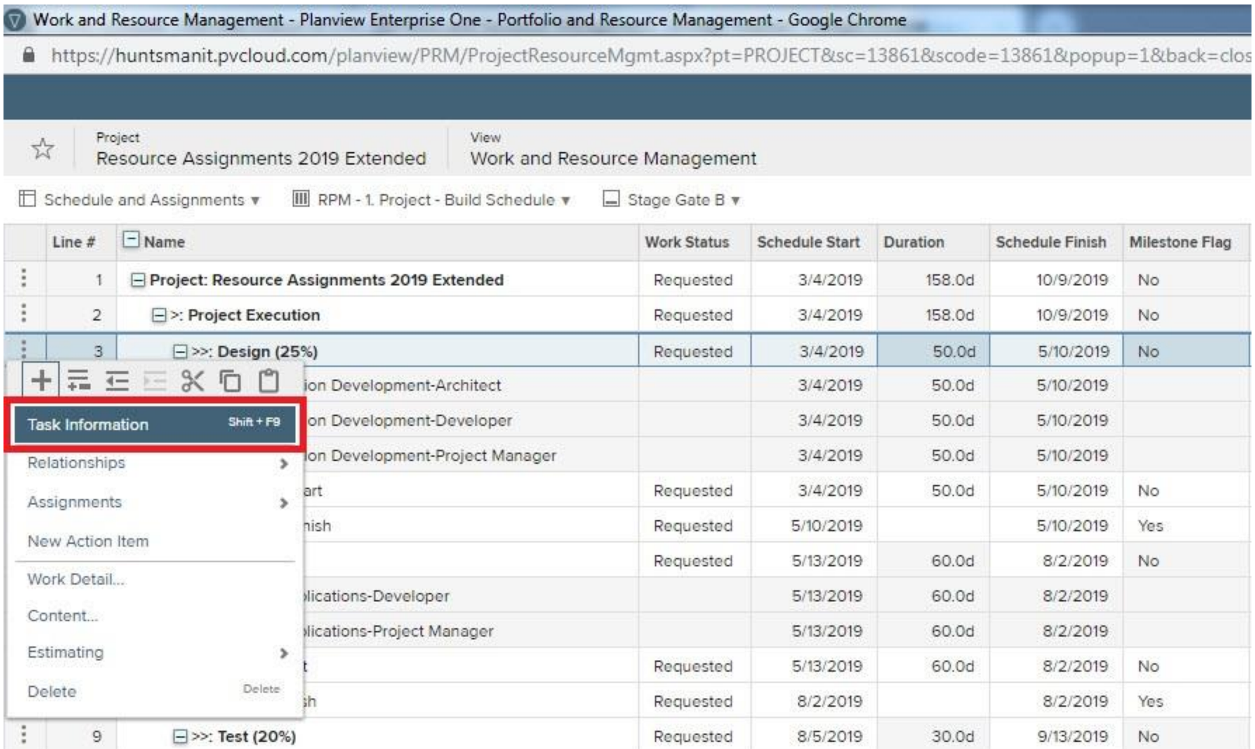
17.20. The **Action Menu** for the **Design Phase** of the **Project** is displayed. See figure PVD98.

Figure PVD98. Action Menu for the Design Phase of the Project (partial screen capture only).



17.21. Click Task Information in the **Action Menu** for the **Design Phase** of the **Project**. See figure PVD99.

Figure PVD99. Task Information selected in the Action Menu for the Design Phase of the Project (partial screen capture only).



17.22. The **Task Information** for each of the **Resources** assigned to the **Design Phase** of the **Project** is displayed at the bottom of the **Work and Resource Management** page. See figures PVD100 and PVD101.

Figure PVD100. Task Information display location (partial screen capture only).

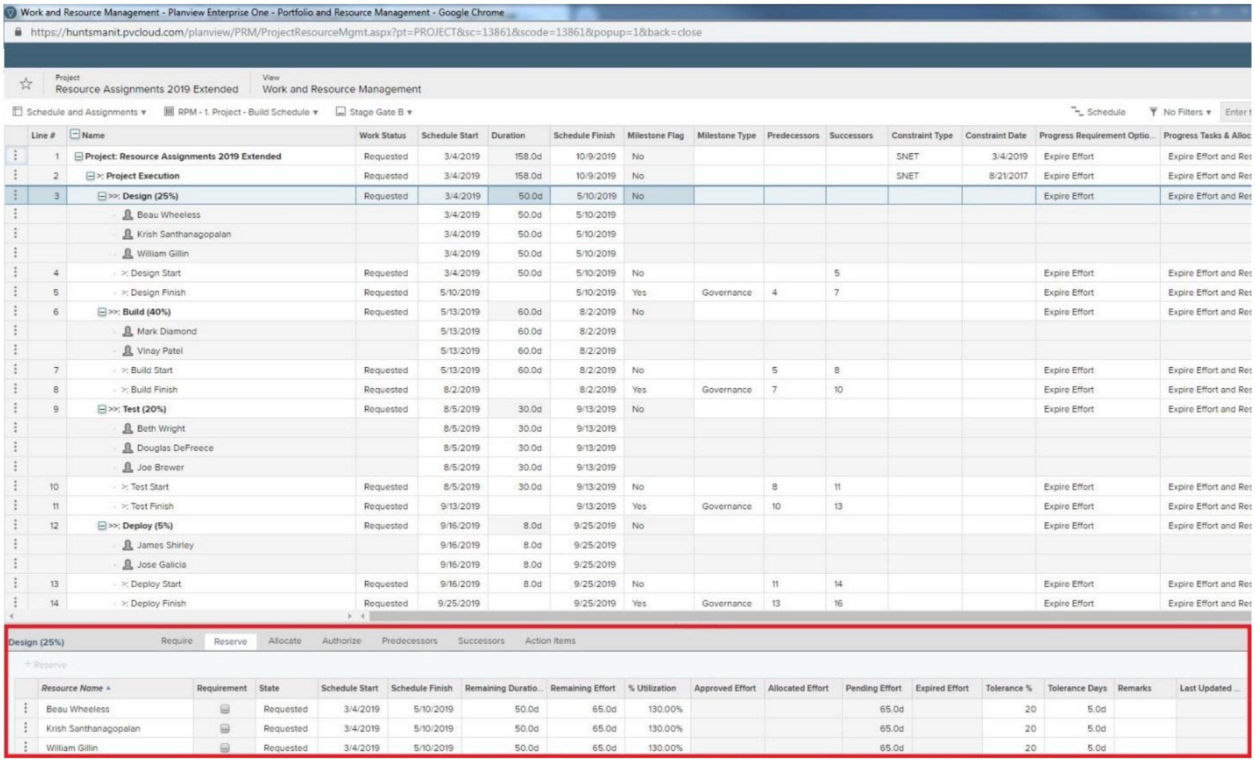
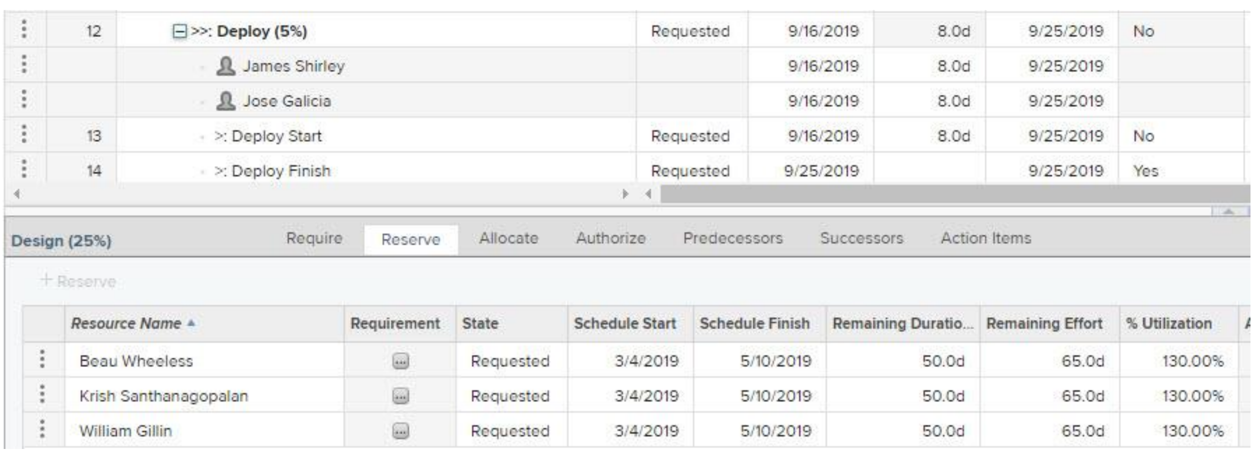


Figure PVD101. Detail view of the Task Information display (partial screen capture only).

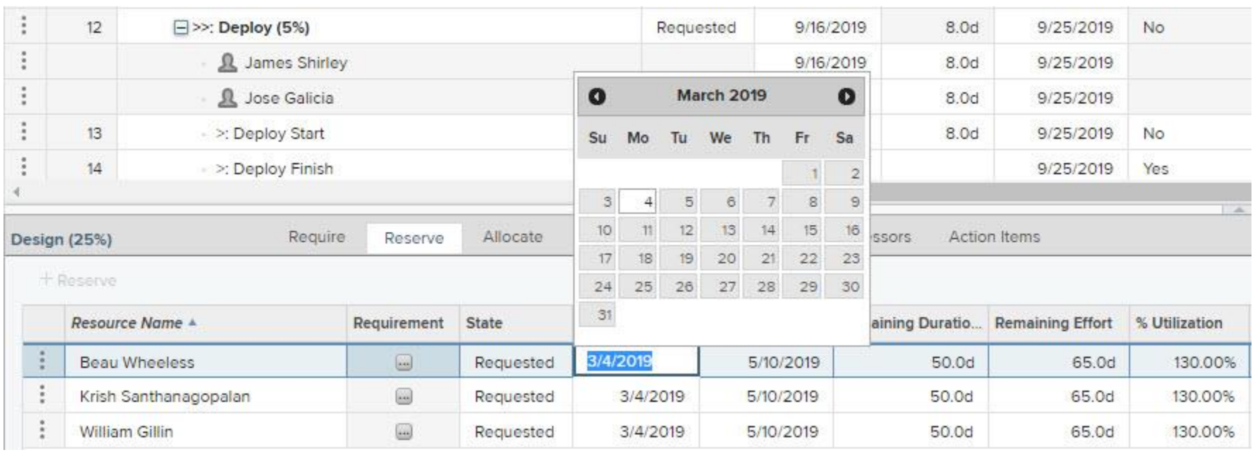


17.23. Double click the Schedule Start and Schedule Finish data fields to launch calendar-based date selection tools. See figure PVD102.

Figure PVD102. Schedule Start and Schedule Finish date selection fields (partial screen capture only).

17.24. Select the (preferred Schedule Start and/or Schedule Finish dates) using the calendar-based date selection tools. See figure PVD103.

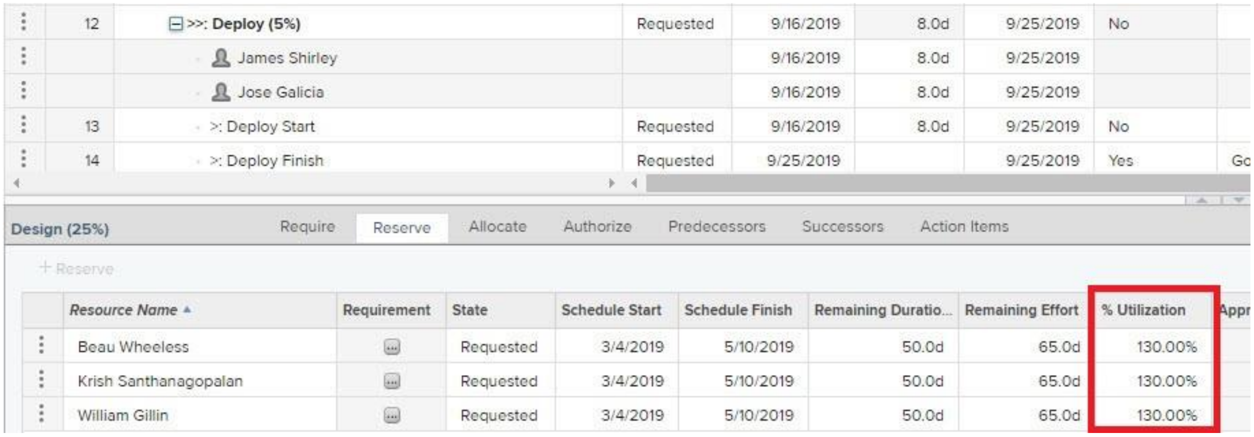
Figure PVD103. Calendar-based date selection tool for Schedule Start in the Task Information section (partial screen capture only).



17.25. Double click the % Utilization data entry field for each **Resource** and enter a (percentage of utilization for the Resource) during the **Design Phase** of the Project. See figures PVD104 and PVD105.

NOTE: When changing the values in the % Utilization fields the data in Remaining Effort (and) Pending Effort and other fields will change accordingly.

Figure PVD104. % Utilization data fields (partial screen capture only).



12	>>: Deploy (5%)	Requested	9/16/2019	8.0d	9/25/2019	No	
	James Shirley		9/16/2019	8.0d	9/25/2019		
	Jose Galicia		9/16/2019	8.0d	9/25/2019		
13	>: Deploy Start	Requested	9/16/2019	8.0d	9/25/2019	No	
14	>: Deploy Finish	Requested	9/25/2019		9/25/2019	Yes	Go

Design (25%) Require Reserve Allocate Authorize Predecessors Successors Action Items

+ Reserve

Resource Name	Requirement	State	Schedule Start	Schedule Finish	Remaining Duratio...	Remaining Effort	% Utilization	Appr
Beau Wheeless		Requested	3/4/2019	5/10/2019	50.0d	65.0d	130.00%	
Krish Santhanagopalan		Requested	3/4/2019	5/10/2019	50.0d	65.0d	130.00%	
William Gillin		Requested	3/4/2019	5/10/2019	50.0d	65.0d	130.00%	

Figure PVD105. % Utilization and Remaining Effort data entry fields (partial screen capture only).

12	>>: Deploy (5%)	Requested	9/16/2019	8.0d	9/25/2019	No	
	James Shirley		9/16/2019	8.0d	9/25/2019		
	Jose Galicia		9/16/2019	8.0d	9/25/2019		
13	>: Deploy Start	Requested	9/16/2019	8.0d	9/25/2019	No	
14	>: Deploy Finish	Requested	9/25/2019		9/25/2019	Yes	Governance

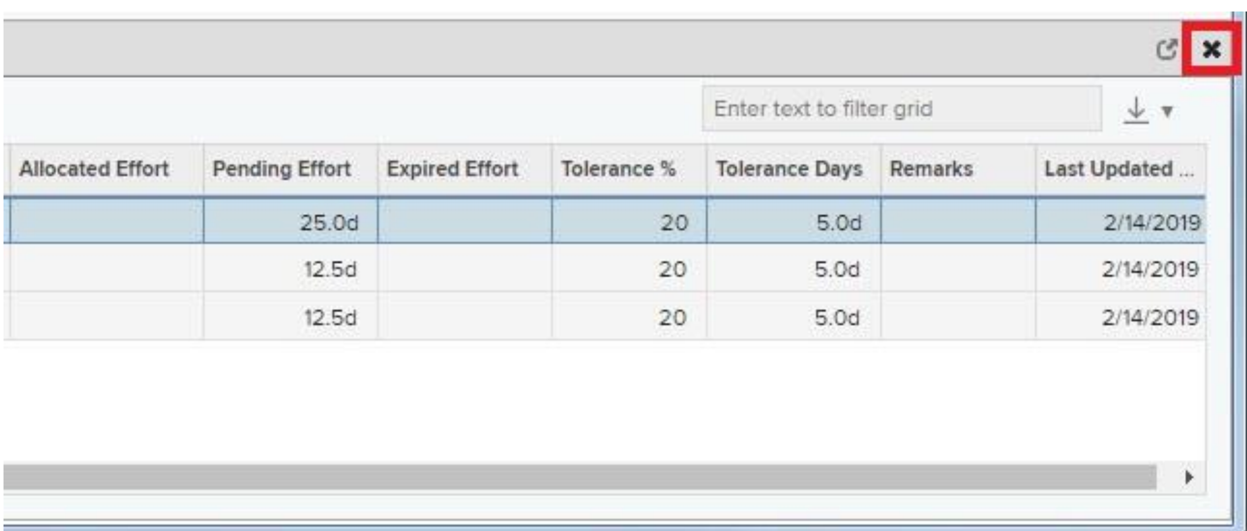
Design (25%) Require Reserve Allocate Authorize Predecessors Successors Action Items

+ Reserve

Resource Name	Requirement	State	Schedule Start	Schedule Finish	Remaining Duratio...	Remaining Effort	% Utilization	Approved Effort
Beau Wheeless		Requested	3/4/2019	5/10/2019	50.0d	25.0d	50.00%	
Krish Santhanagopalan		Requested	3/4/2019	5/10/2019	50.0d	12.5d	25.00%	
William Gillin		Requested	3/4/2019	5/10/2019	50.0d	12.5d	25.00%	

17.26. After the **% Utilization** selections are complete click the Close icon in the upper right corner of the **Task Information** section of the **Work and Resource Management** screen to save the selections made. See figure PVD106

Figure PVD106. Task Information section close icon (partial screen capture only).



Enter text to filter grid

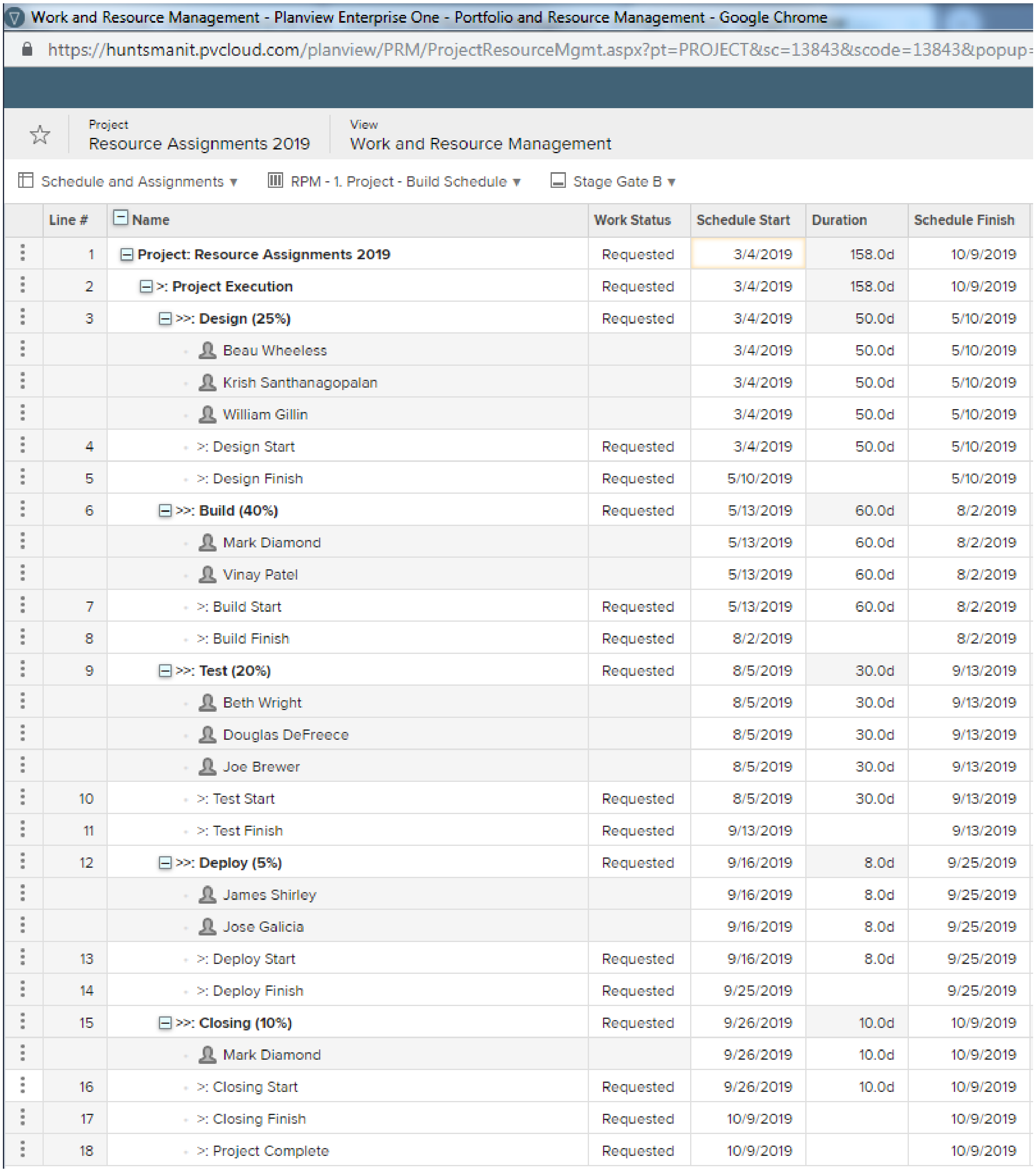
Allocated Effort	Pending Effort	Expired Effort	Tolerance %	Tolerance Days	Remarks	Last Updated ...
	25.0d		20	5.0d		2/14/2019
	12.5d		20	5.0d		2/14/2019
	12.5d		20	5.0d		2/14/2019

17.27. After clicking the Close icon in the **Task Information** section the **Work and Resource Management** screen remains displayed.

17.28. Repeat steps 17.19 through 17.27 for each **Resource** assigned to the **Project** by clicking the Action Menu Icons next to each **Phase** of the **Project** to reveal the **Task Information** section by **Phase**.

17.29. Verify that the previously entered schedule and resource information is still/currently complete and correct. See figure PVD107.

Figure PVD107. Detail view of the Work and Resource Management screen with Resources assigned and Roles to which they were assigned removed (partial screen capture only).

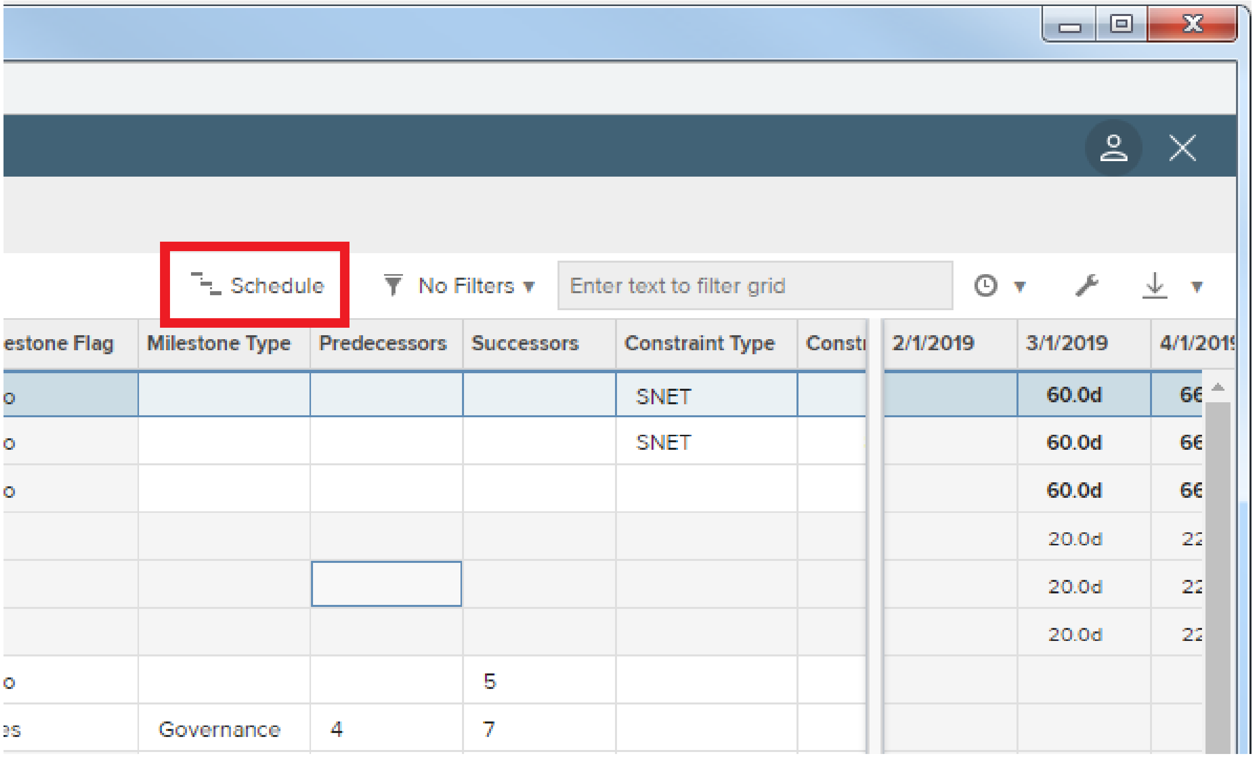


Line #	Name	Work Status	Schedule Start	Duration	Schedule Finish
1	**Project: Resource Assignments 2019**	Requested	3/4/2019	158.0d	10/9/2019
2	**>: Project Execution**	Requested	3/4/2019	158.0d	10/9/2019
3	**>>: Design (25%)**	Requested	3/4/2019	50.0d	5/10/2019
	Beau Wheeless		3/4/2019	50.0d	5/10/2019
	Krish Santhanagopalan		3/4/2019	50.0d	5/10/2019
	William Gillin		3/4/2019	50.0d	5/10/2019
4	>: Design Start	Requested	3/4/2019	50.0d	5/10/2019
5	>: Design Finish	Requested	5/10/2019		5/10/2019
6	**>>: Build (40%)**	Requested	5/13/2019	60.0d	8/2/2019
	Mark Diamond		5/13/2019	60.0d	8/2/2019
	Vinay Patel		5/13/2019	60.0d	8/2/2019
7	>: Build Start	Requested	5/13/2019	60.0d	8/2/2019
8	>: Build Finish	Requested	8/2/2019		8/2/2019
9	**>>: Test (20%)**	Requested	8/5/2019	30.0d	9/13/2019
	Beth Wright		8/5/2019	30.0d	9/13/2019
	Douglas DeFreece		8/5/2019	30.0d	9/13/2019
	Joe Brewer		8/5/2019	30.0d	9/13/2019
10	>: Test Start	Requested	8/5/2019	30.0d	9/13/2019
11	>: Test Finish	Requested	9/13/2019		9/13/2019
12	**>>: Deploy (5%)**	Requested	9/16/2019	8.0d	9/25/2019
	James Shirley		9/16/2019	8.0d	9/25/2019
	Jose Galicia		9/16/2019	8.0d	9/25/2019
13	>: Deploy Start	Requested	9/16/2019	8.0d	9/25/2019
14	>: Deploy Finish	Requested	9/25/2019		9/25/2019
15	**>>: Closing (10%)**	Requested	9/26/2019	10.0d	10/9/2019
	Mark Diamond		9/26/2019	10.0d	10/9/2019
16	>: Closing Start	Requested	9/26/2019	10.0d	10/9/2019
17	>: Closing Finish	Requested	10/9/2019		10/9/2019
18	>: Project Complete	Requested	10/9/2019		10/9/2019

NOTE: Only the non-shaded fields (white in the browser) are editable.

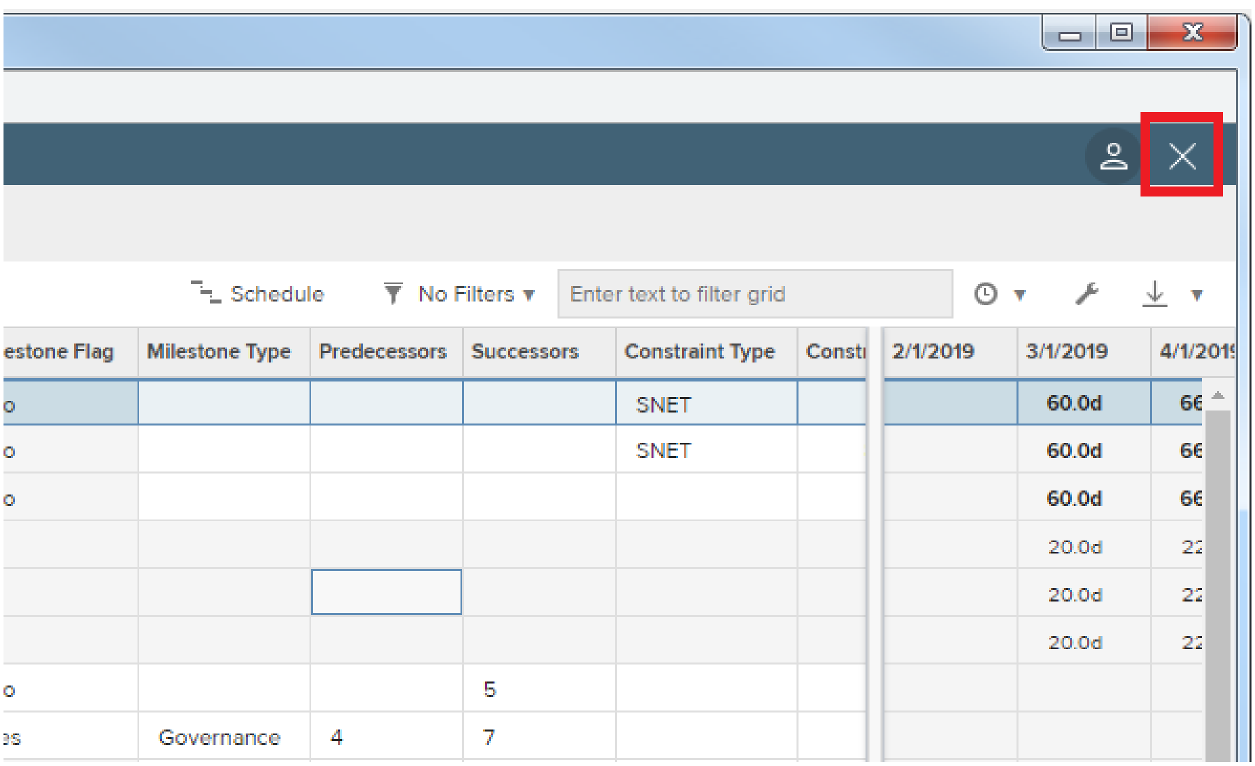
17.30. After verification click Schedule in the upper right portion of the **Work and Resource Management** screen to save the data entered/selected. See figure PVD108.

Figure PVD108. Schedule in the Work and Resource Management screen (partial screen capture only).



17.31. Click Close (**X**) in the upper right corner of the **Work and Resource Management** screen menu bar. See figure PVD109.

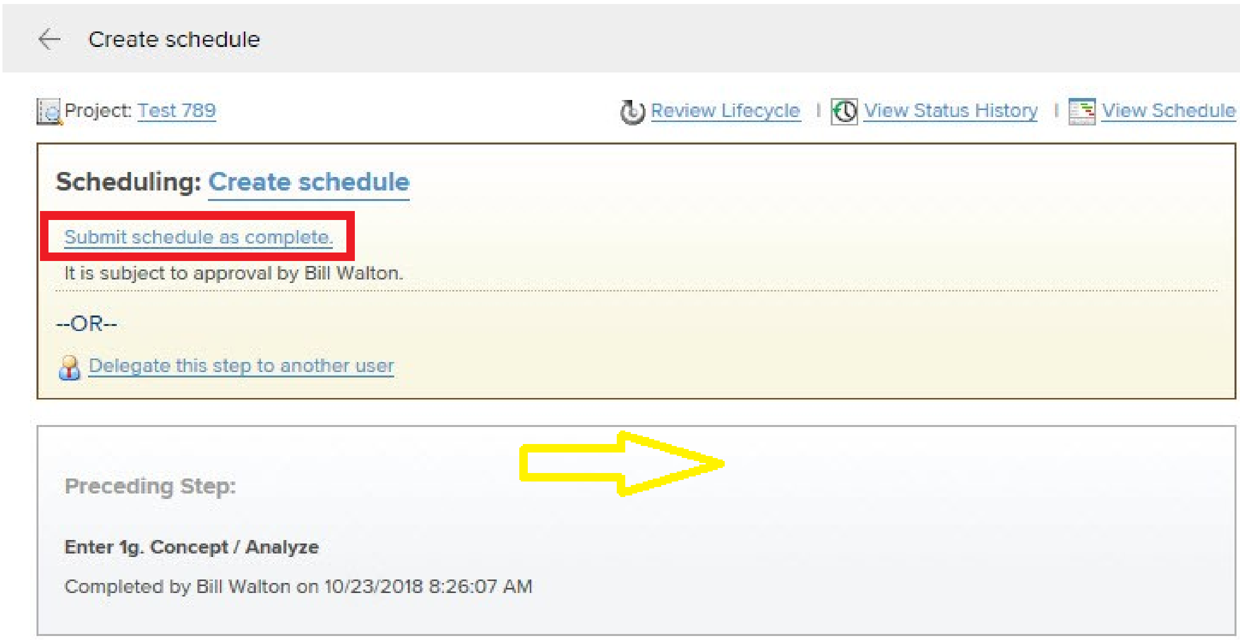
Figure PVD109. Close in the Work and Resource Management screen (partial screen capture only).



17.32. After Close is clicked in the **Work & Resource Management** screen the **Scheduling: Create schedule** screen is displayed.

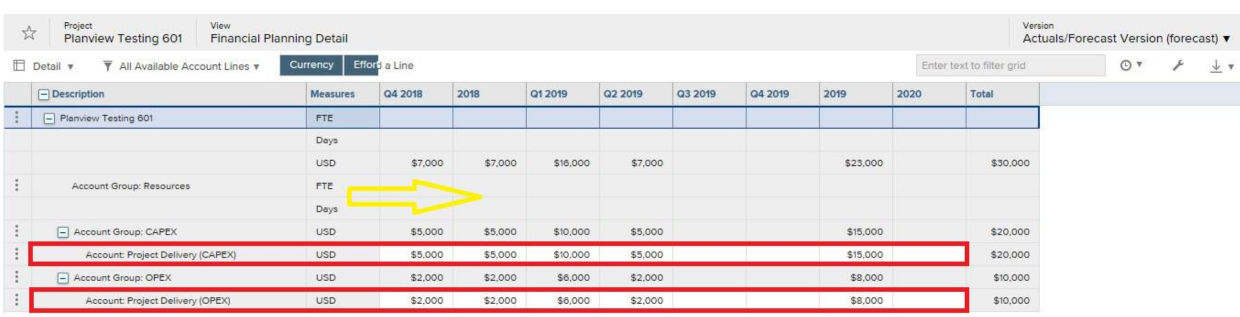
17.33. Click the Submit schedule as complete hyperlink in the **Scheduling: Create schedule** screen. See figure PVD110.

Figure PVD110. Scheduling: Create schedule (modified horizontally compressed screen capture- the actual Planview screen is wider).



17.34. After the Submit schedule as complete hyperlink is clicked in the **Scheduling: Create schedule** screen the **Financial Planning Detail** screen is displayed. See figure PVD111.

Figure PVD111. Financial Summary with CAPEX and OPEX entered (modified horizontally compressed screen capture- the actual Planview screen is wider).



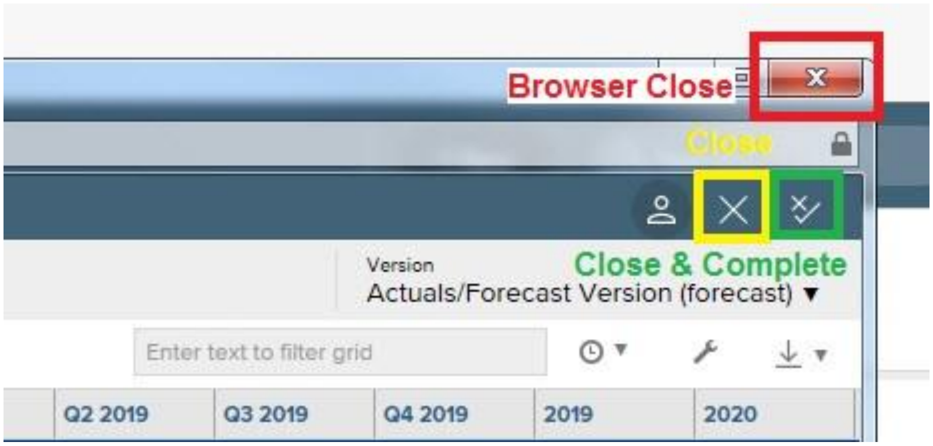
Description	Measures	Q4 2018	2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019	2019	2020	Total
Planview Testing 601	FTE									
	Days									
	USD	$7,000	$7,000	$16,000	$7,000			$23,000		$30,000
Account Group: Resources	FTE									
	Days									
Account Group: CAPEX	USD	$5,000	$5,000	$10,000	$5,000			$15,000		$20,000
Account: Project Delivery (CAPEX)	USD	$5,000	$5,000	$10,000	$5,000			$15,000		$20,000
Account Group: OPEX	USD	$2,000	$2,000	$6,000	$2,000			$8,000		$10,000
Account: Project Delivery (OPEX)	USD	$2,000	$2,000	$6,000	$2,000			$8,000		$10,000

17.35. Make any necessary adjustments/revisions as required.

17.36. Verify financials are complete and correct.

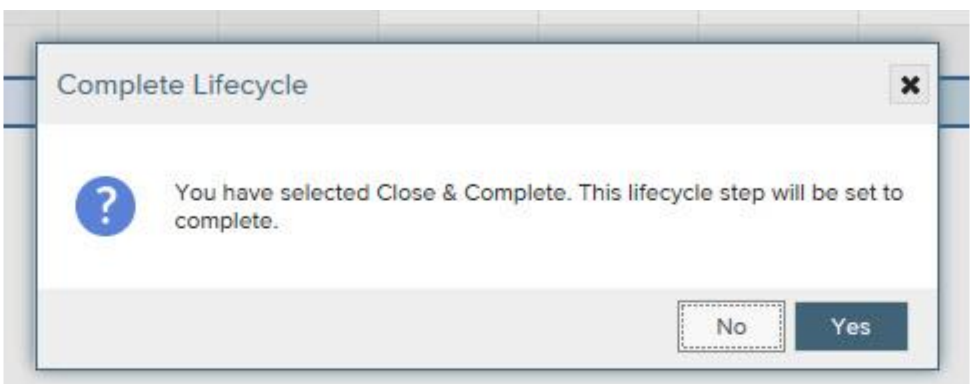
17.37. After verification click the Close & Complete icon (X with ✓underneath) in the upper right corner of the **Financial Planning Details** menu bar. See figure PVD112.

Figure PVD112. Planvew Close & Complete icon in green, Planview Close icon in yellow, and browser close icon in red (partial screen capture of the upper right corner of the browser window only).



17.38. After Close & Complete is clicked in the **Financial Planning Detail** screen the **Complete Lifecycle** dialog box is displayed. See figure PVD113.

Figure PVD113. Complete Lifecycle dialog box.



17.39. Click Yes in the **Complete Lifecycle** dialog box.

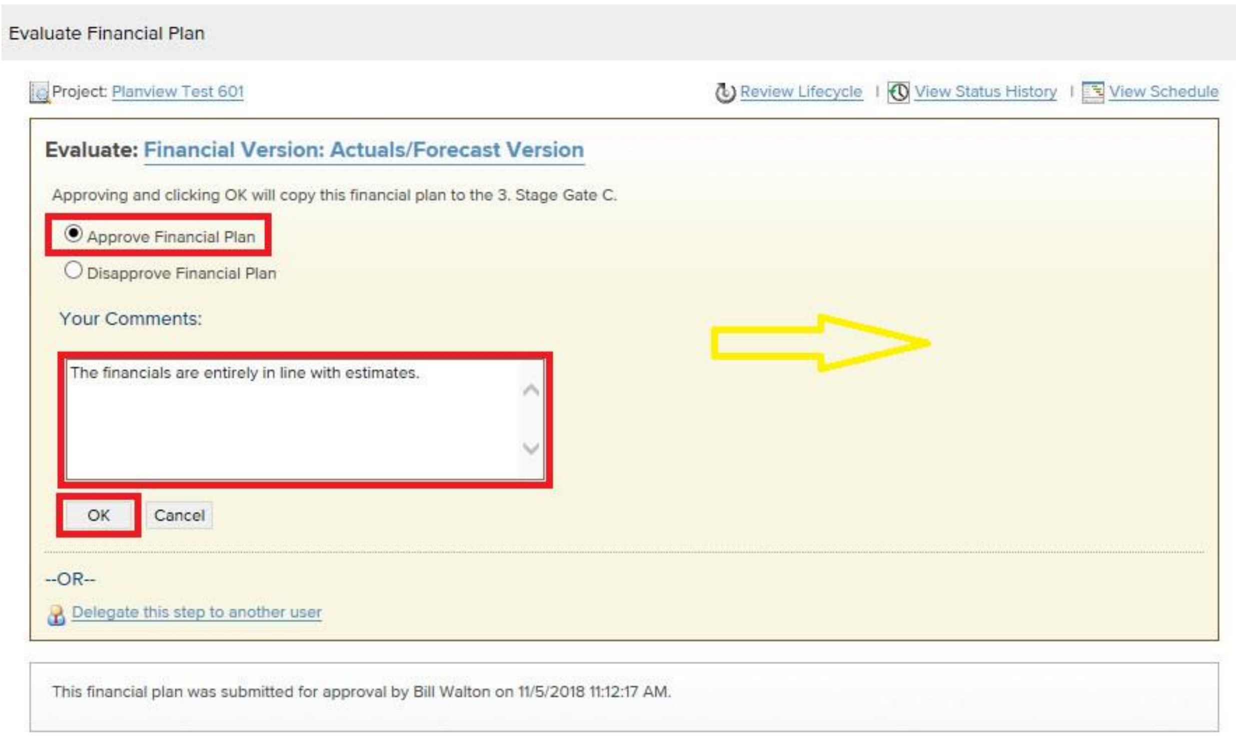
17.40. After Yes is clicked in the **Complete Lifecycle** dialog box the **Evaluate: Financial Version: Actuals/Forecast Version** screen is displayed.

17.41. Click the radio button next to **Approve Financial Plan** in the **Evaluate: Financial Version: Actuals/Forecast Version** screen.

17.42. Click in the **Your Comments** data entry field to enter (whatever pertinent comments should accompany the project as it continues through the workflow).

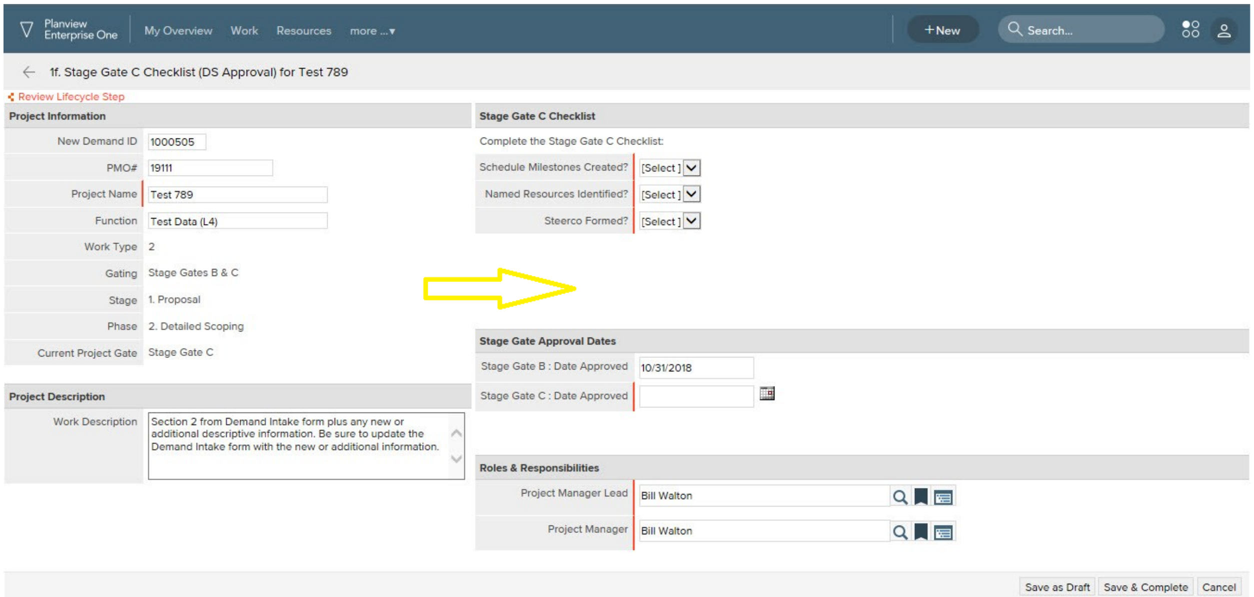
17.43. Click OK below the **Your Comments** data entry field to approve the financial plan. See figure PVD114.

Figure PVD114. Evaluate: Financial Version: Actuals/Forecast Version (modified horizontally compressed screen capture- the actual Planview screen is wider).



17.44. After OK is clicked in the **Evaluate: Financial Version: Actuals/Forecast Version** screen the **Stage Gate C Checklist (DS Approval- Detailed Scoping Approval)** screen is displayed. See figure PVD115.

Figure PVD115. Stage Gate C Checklist (DS Approval) screen (modified horizontally compressed screen capture- the actual Planview screen is wider).



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18. Stage Gate C Checklist (DS Approval- Detailed Scoping Approval)

Proposal stage- Project Manager Leads

NOTE: Project Manager Lead (and/or) Project Manager roles can be changed here under Roles & Responsibilities if necessary

18.1. At the top of the right data column select a **Schedule Milestones Correct?** response by clicking the down caret next to the **Schedule Milestones Correct?** data selection field and clicking (the appropriate yes [or] no response) from the dropdown menu to select it.

NOTE: At this point in the workflow the answer for this question should be yes.

18.2. Select a **Named Resource Identified?** response by clicking the down caret next to the **Named Resource Identified?** data selection field and clicking (the appropriate yes [or] no response) from the dropdown menu to select it.

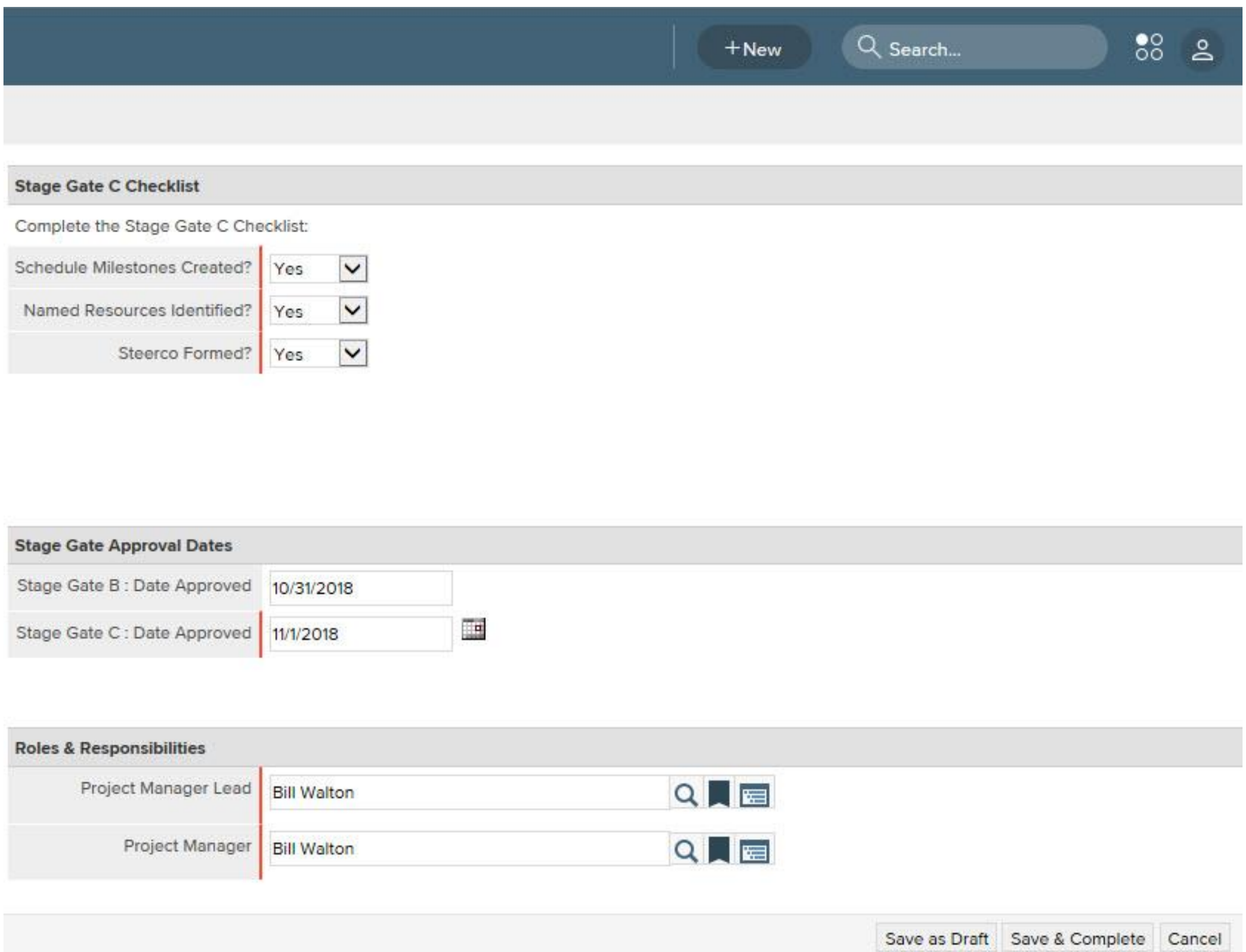
NOTE: At this point in the workflow the answer for this question should be yes.

18.3. Select a **Steerco Formed?** response by clicking the down caret next to the **Steerco Formed?** data selection field and clicking (the appropriate yes [or] no response) from the dropdown menu to select it.

NOTE: At this point in the workflow the answer for this question should be yes.

18.4. Select the **Stage Gate C : Date Approved** date by clicking the calendar launch icon next to the **Stage Gate C : Date Approved** data selection field and selecting (the date on which Stage Gate C was approved). See figure PVD116.

Figure PVD116. Stage Gate C Checklist completed (right data column only) (partial screen capture only).



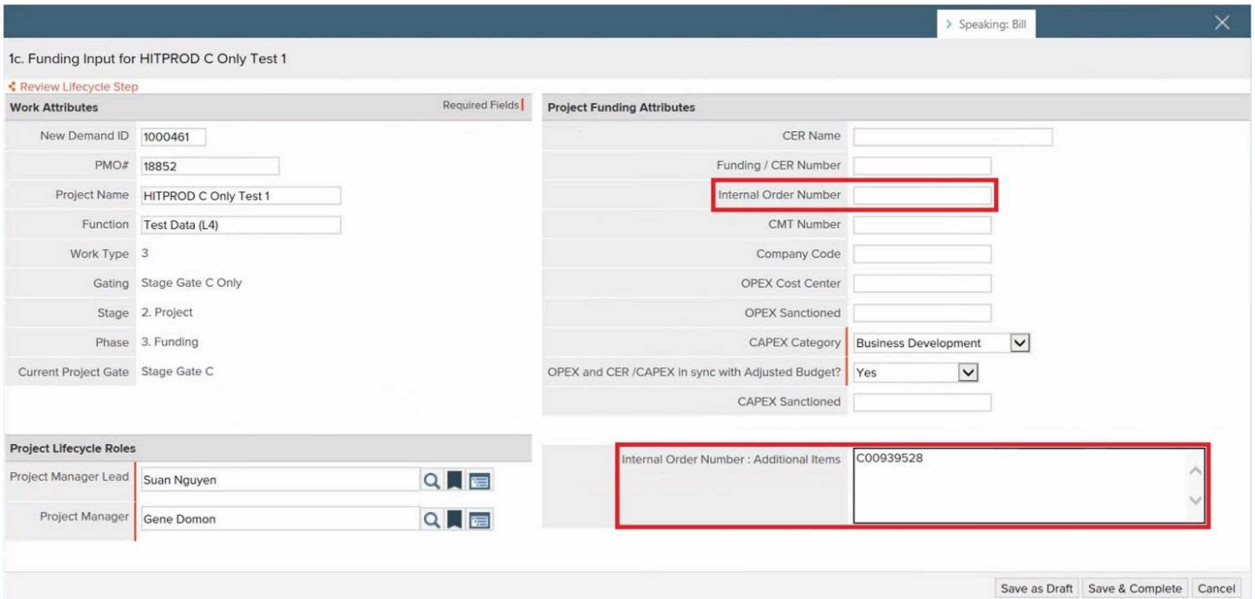
18.5. Verify information selected is correct.

18.6. After verification click Save & Complete in the lower right portion of the **Stage Gate C Checklist (DS Approval)** screen.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel*.*

18.7. After Save & Complete is clicked in the **Stage Gate C Checklist (DS Approval)** screen the **Funding Input** screen is displayed. See figure PVD117.

Figure PVD117. Funding Input screen with Internal Order Number field(s) highlighted in red.



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19. Funding Input

Active Project stage- Project Managers

NOTE: Project Manager Lead (and/or) Project Manager roles can be changed here under Project Lifecycle Roles if necessary.

NOTE: The project is now assigned a New Demand ID (prefilled) appearing at the top of the left data column.

NOTE: A completed Capital Expenditure Request (CER) is required for this portion of the workflow. CER completion steps can be found here.

Project Funding Attributes

19.1.1. At the top of the right data column click in the **CER Name** data entry field to enter (the title of the CER exactly as it is displayed in the Global CAPEX Database).

19.1.2. Click in the **Funding / CER Number** data entry field to enter (the CER number exactly as it is displayed in the Global CAPEX database).

19.1.3. Click in the **Internal Order Number** data entry field to enter (the internal order number exactly as it was generated by the SAP Administrator).

19.1.4. Click in the **Internal Order Number : Additional Items** data entry field *at the bottom of the right data column* to enter (any additional internal order numbers associated with the project exactly as they were generated by the SAP Administrator).

19.1.5. Click in the **CMT Number** data entry field to enter (the CMT number exactly as it was generated in SAP).

19.1.6. Click in the **Company Code** data entry field to enter (the appropriate Huntsman company code). Refer to the Company Code list available at https://thehub.huntsman.com/docs/DOC-280795.

19.1.7. Click in the **OPEX Cost Center** data entry field to enter (the cost center charged with the operating expense during the project). Refer to the Cost Category GL Account list available at https://thehub.huntsman.com/docs/DOC-181096.

*NOTE: The OPEX cost center entered here **must** be the IT OPEX cost center.*

19.1.8. Click in the **OPEX Sanctioned** data entry field to enter (the amount of operating expenses approved for the project in whole US dollars).

19.1.9. Select a **CAPEX Category** response by clicking the down caret next to the **CAPEX Category** data selection field and clicking (the appropriate response) from the dropdown menu to select it. See table PVDT2 and figure PVD118.

Table PVDT2. CAPEX Categories.

Parameter	Category
A	Acquisitions
B	Business Development- projects for capacity increases, expansion for new product lines or new business to existing assets.
E2	Environmental Discretionary- projects that have environmental benefits; projects to reduce risks in the environmental area.
E1	Environmental Mandatory- projects that have environmental benefit and are required to comply with governmental agency legislative requirements, the Huntsman Global EHS standards, or a risk

	reduction from a EHS-4 / EHS-3 risk level to at least EHS-2 risk level
D	Improvements- benefit based on reduction of costs or improvement of margin to existing assets.
IM	Mandatory IT- projects that have IT benefits required to comply with governmental agency legislative requirements and the Huntsman Global IT standards
R3	Renewals High Risk- maintenance renewals / replacements that are required to maintain existing assets and are high risk because the business loss severity and renewal likelihood of the current situation lie in the red zone of the renewal criticality assessment (RCA) matrix.
R4	Renewals Medium Risk- are maintenance renewals / replacements that are required to maintain existing assets and are medium risk because the business loss severity and renewal likelihood of the current situation lie in the yellow zone of the renewal criticality assessment (RCA) matrix.
R5	Renewals Low Risk- maintenance renewals / replacements that are required to maintain existing assets and are low risk because the business loss severity and renewal likelihood of the current situation lie in the green zone of the renewal criticality assessment (RCA) matrix.
S2	Safety Discretionary- projects that have safety / health benefits. They are projects to reduce risks in the area of safety/ health.
S1	Safety Mandatory- projects have safety / health benefits and are required to comply with governmental agency legislative requirements, the Huntsman Global EHS standards, or a risk reduction from a EHS-4 / EHS-3 risk level to at least EHS-2 risk level.
-	No selection

NOTE: E1 requires at least one of the following to be cited and the timetable on which the work is required should be stated in the project description: The governmental regulation number, the Global EHS standard number and reference to at least one mandatory requirement where a non-compliance has been determined through a corporate EHS / PSM audit or self-audit, or the EHS matrix.

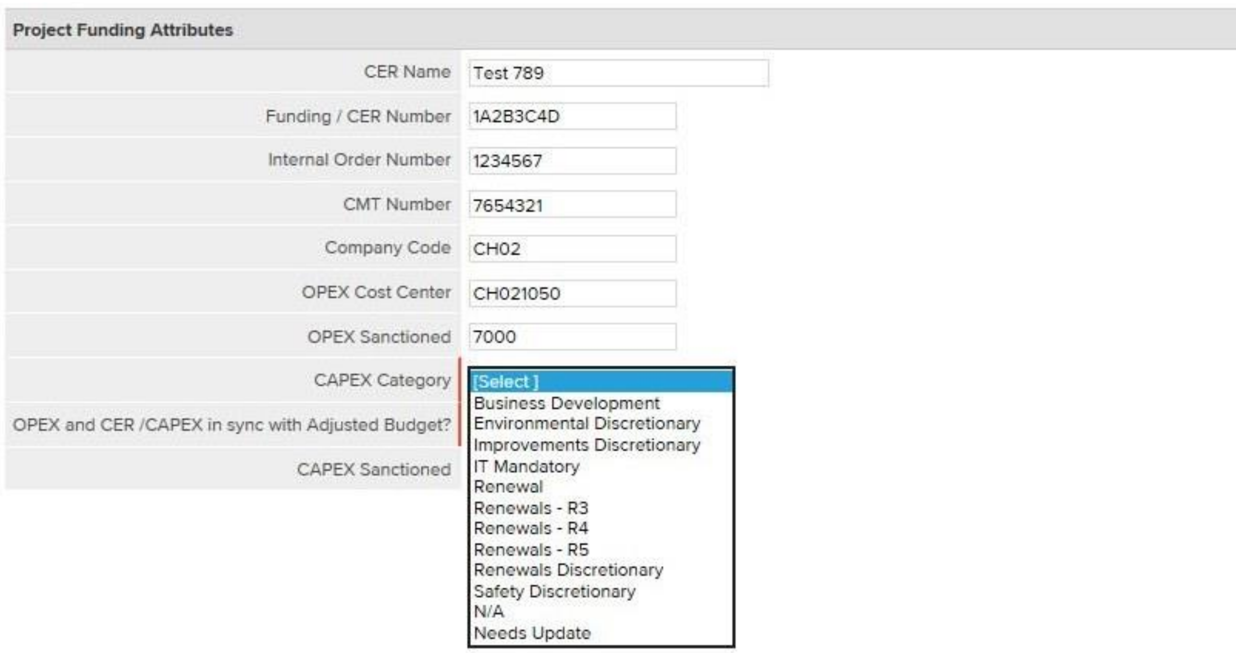
NOTE: IM requires the governmental regulation # or Global IT standard # and the timetable on which the work is required to be stated in the project description.

NOTE: R3, R4, and 5 all require the renewal criticality assessment (RCA) be stated in the project description.

NOTE: S1 requires at least one of the following to be cited and the timetable on which the work is required should be stated in the project description: The governmental regulation number, the Global EHS standard number and reference to at least one mandatory requirement where a *non-compliance has been determined through a corporate EHS / PSM audit or self-audit. Or the EHS matrix*

NOTE: IT usually uses IM (mandatory), R (renewals), or D (discretionary) for capital category types. See figure PVD93 (above).

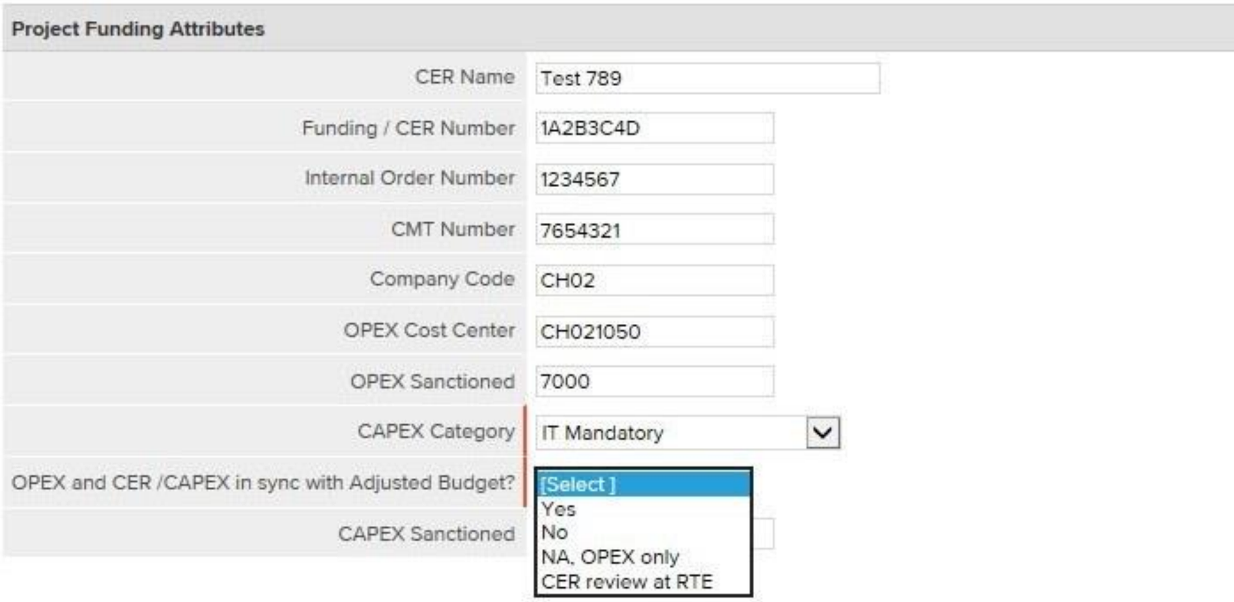
Figure PVD118. CAPEX Category selection options (partial screen capture only).



19.1.10. Select an **OPEX and CER /CAPEX in sync with Adjusted Budget?** response by clicking the down caret next to the **OPEX and CER /CAPEX in sync with Adjusted Budget?** data selection field and clicking (the appropriate response) from the dropdown menu to select it.

19.1.11. Click in the **CAPEX Sanctioned** data entry field to enter (the amount of capital expenses approved for the project in whole US dollars). See figure PVD119.

Figure PVD119. OPEX and CER/CAPEX in sync with Adjusted Budget selection options (partial screen capture only).



19.1.12. Verify all data in the **Funding Input** screen is complete and correct.

19.1.13. After verification click Save & Complete in the lower right corner of the **Funding Input** screen. See figure PVD120 and PVD121.

NOTE: If for some reason the user is not prepared to continue the workflow can be saved as a draft by clicking Save as Draft *instead of Save & Complete. If the user does not wish to save the work at this point the user can cancel without saving by clicking* Cancel*.*

Figure PVD120. Project Funding Attributes section completed (modified horizontally *and* vertically compressed screen capture- the actual Planview screen is wider).

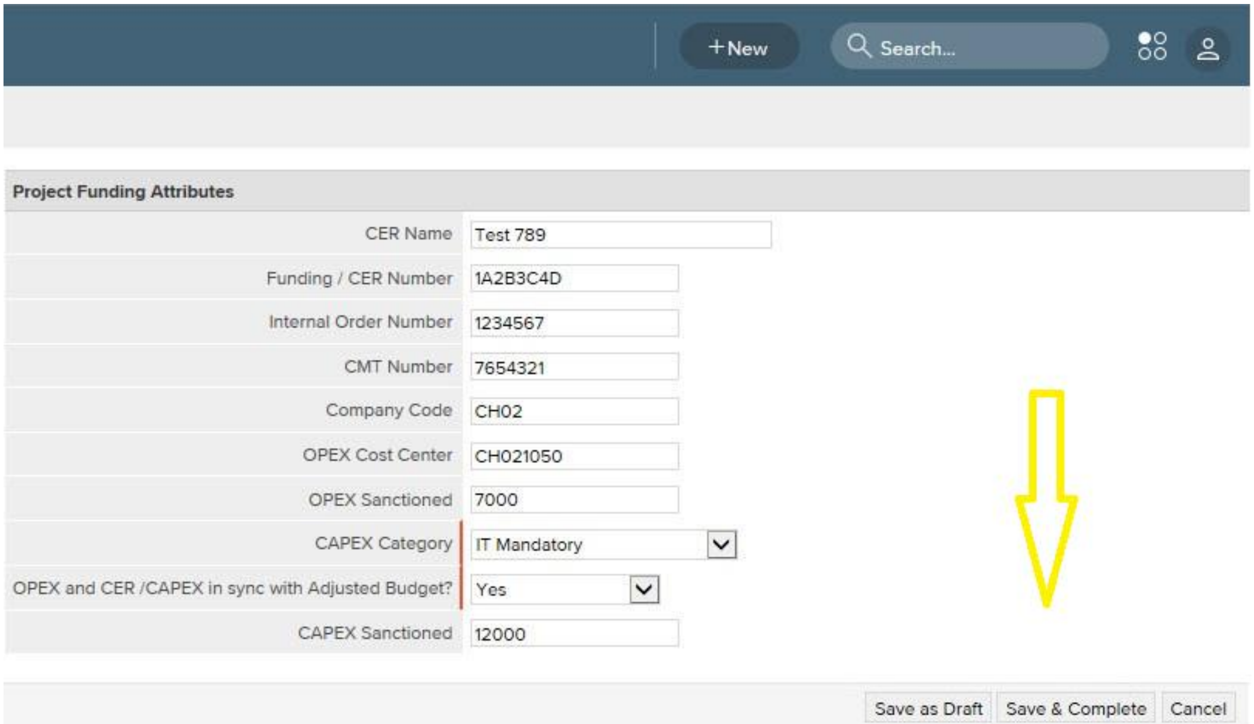
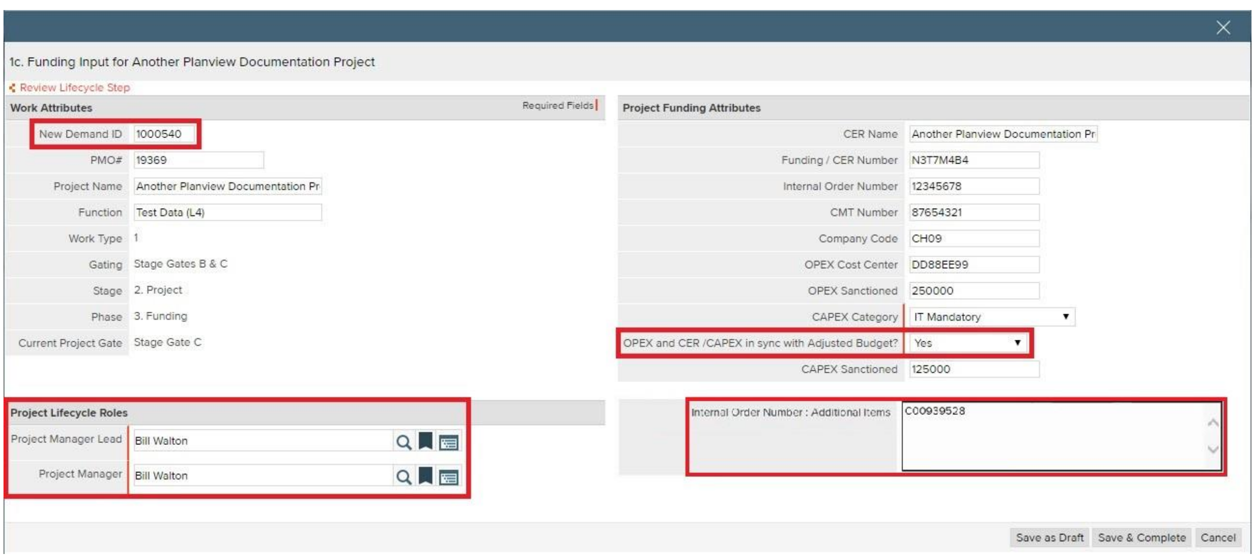
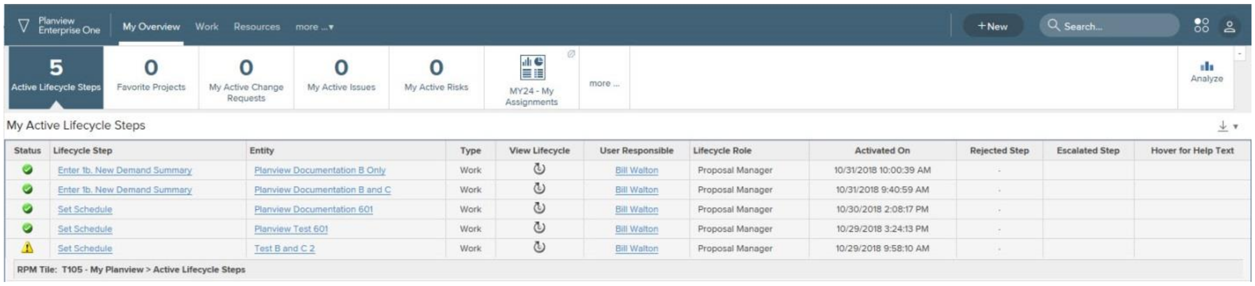


Figure PVD121. Funding Input screen completed (full screen capture with New Demand ID, Project Lifecycle Roles, OPEX and CER/CAPEX in sync with Adjusted Budget?, and Internal Order Number : Additional Items fields highlighted in red.



19.1.14. After Save and Complete is clicked in the **Funding Input** screen the **My Overview** screen is displayed. See figure PVD122.

Figure PVD122. My Overview.



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20. Execution

Active Project stage- Project Managers

NOTE: Project Manager should now be actively managing the project schedule and financials.

20.1. End-of-Month Financial Updates in Planview

An updated and completed financial log for each project must be sent to the PMO no later than the last business day of the month. The Project Manager is still responsible for loading forecasts that have been submitted after the last business day of the month. The project financials in Planview must also be updated to stay in sync with the financial logs submitted to the PMO. The last business days for each month in 2019 and 2020 are:

2019

Thursday 31 January 2019

Thursday 28 February 2019

Friday 29 March 2019

Tuesday 30 April 2019

Friday 31 May 2019

Friday 28 June 2019

Wednesday 31 July 2019

Friday 30 August 2019

Monday 30 September 2019

Thursday 31 October 2019

Wednesday 27 November 2019

Tuesday 31 December 2019

2020

Friday 31 January 2020

Friday 28 February 2020

Tuesday 31 March 2020

Thursday 30 April 2020

Friday 29 May 2020

Tuesday 30 June 2020

Friday 31 July 2020

Monday 31 August 2020

Wednesday 30 September 2020

Friday 30 October 2020

Monday 30 November 2020

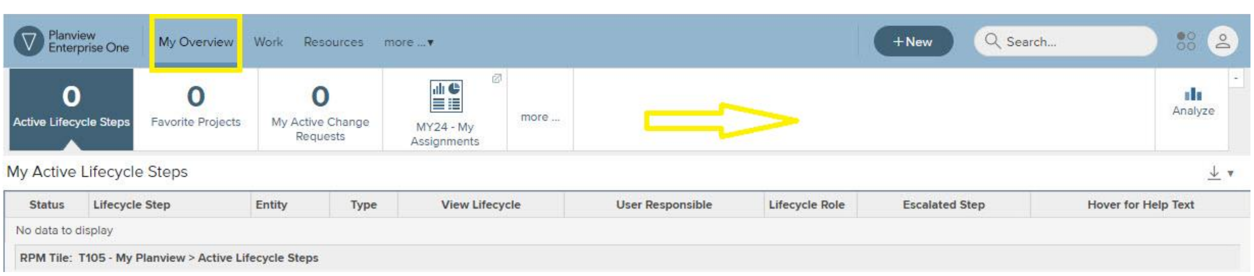
Thursday 31 December 2020

Login

Login to Planview Enterprise One at https://huntsmanit.pvcloud.com/planview/login/body.asp using the username and password provided by the administrator.

The **My Overview** tab is displayed by default when opening Planview Enterprise One. See figure PVF1.

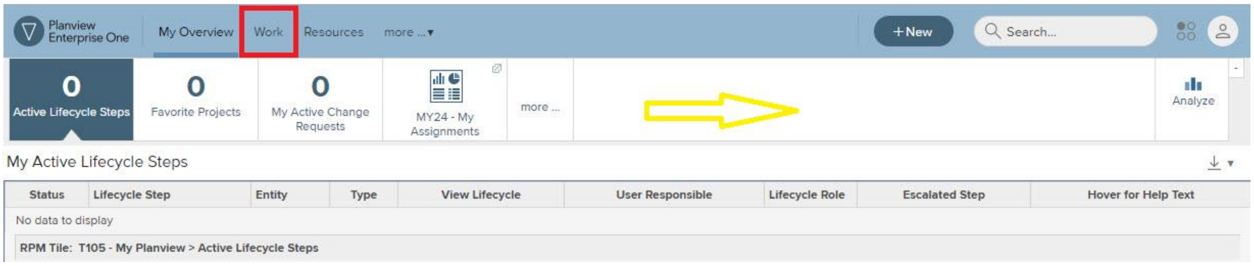
Figure PVF1. My Overview (modified horizontally compressed screen capture- the actual Planview screen is wider).



20.1.1. <u>Updating Financials</u>

20.1.1.1. Click the Work menu hyperlink in the Planview Enterprise One menu bar at the top of the **My Overview** page. See figure PVF2.

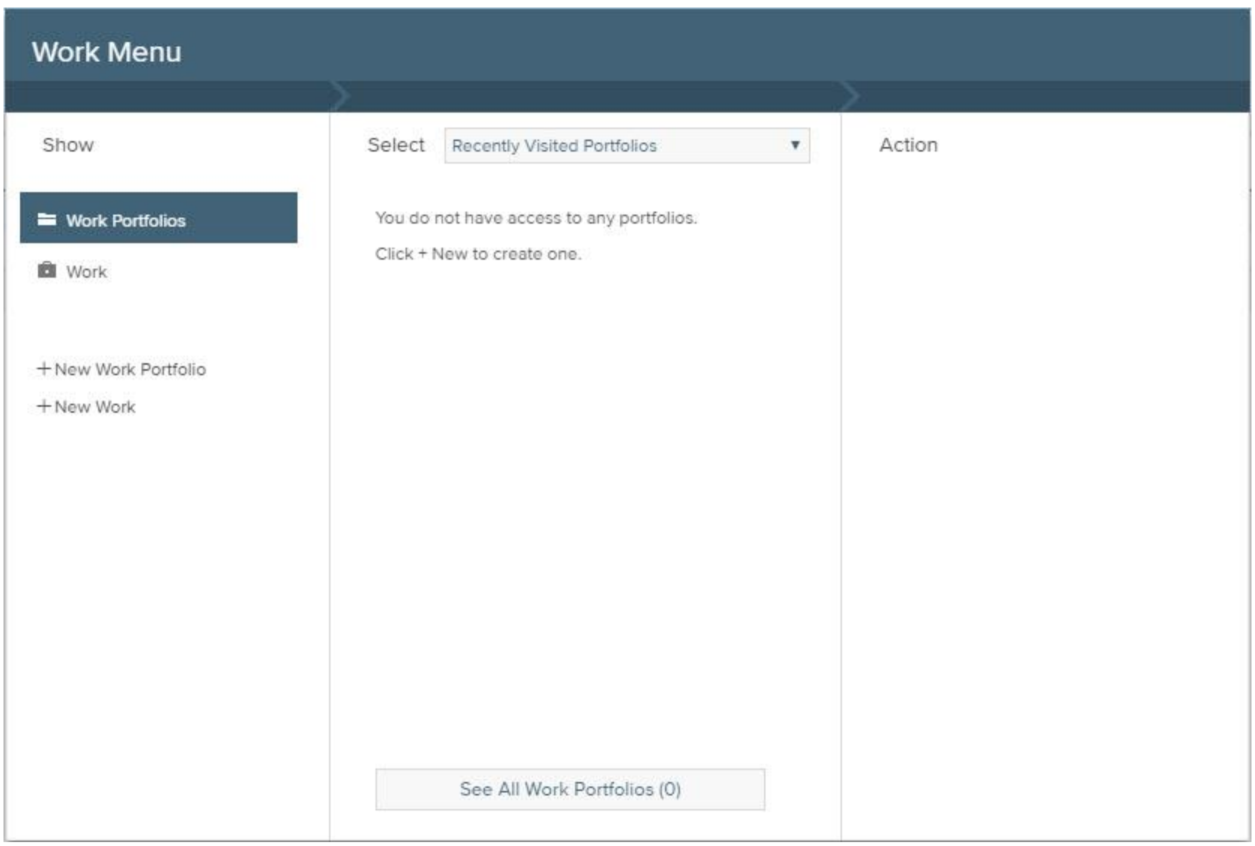
Figure PVF2. Work menu hyperlink (modified horizontally compressed screen capture- the actual Planview screen is wider).



20.1.1.2. The **Work Menu** dialog box is displayed. See figure PVF3.

NOTE: The appearance of this screen may differ from the screen capture below.

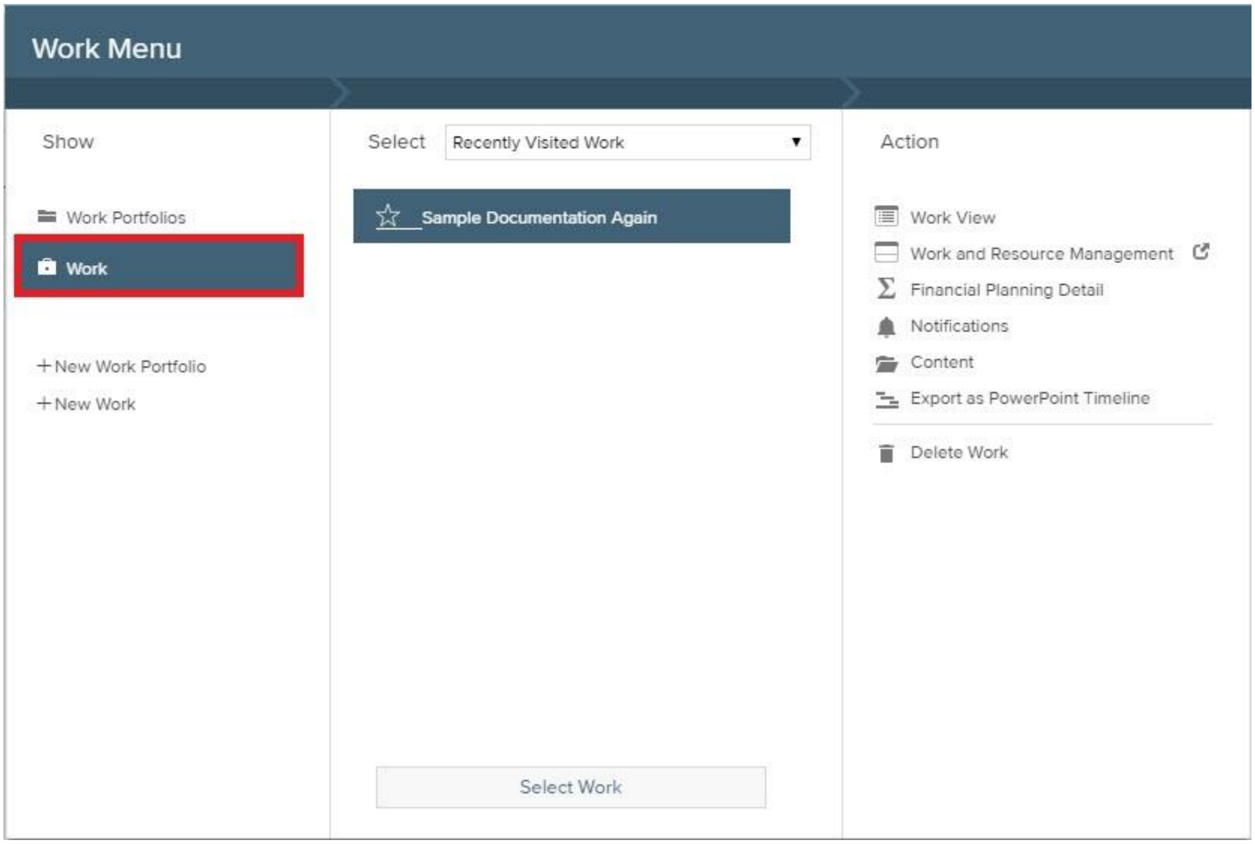
Figure PVF3. Work Menu (full screen capture of the dialog box).



20.1.1.3. Click Work in the **Show** column on the left side of the **Work Menu** dialog box to view the Projects with which the user is associated. See figure PVF4.

NOTE: The appearance of this screen will differ from the screen capture below.

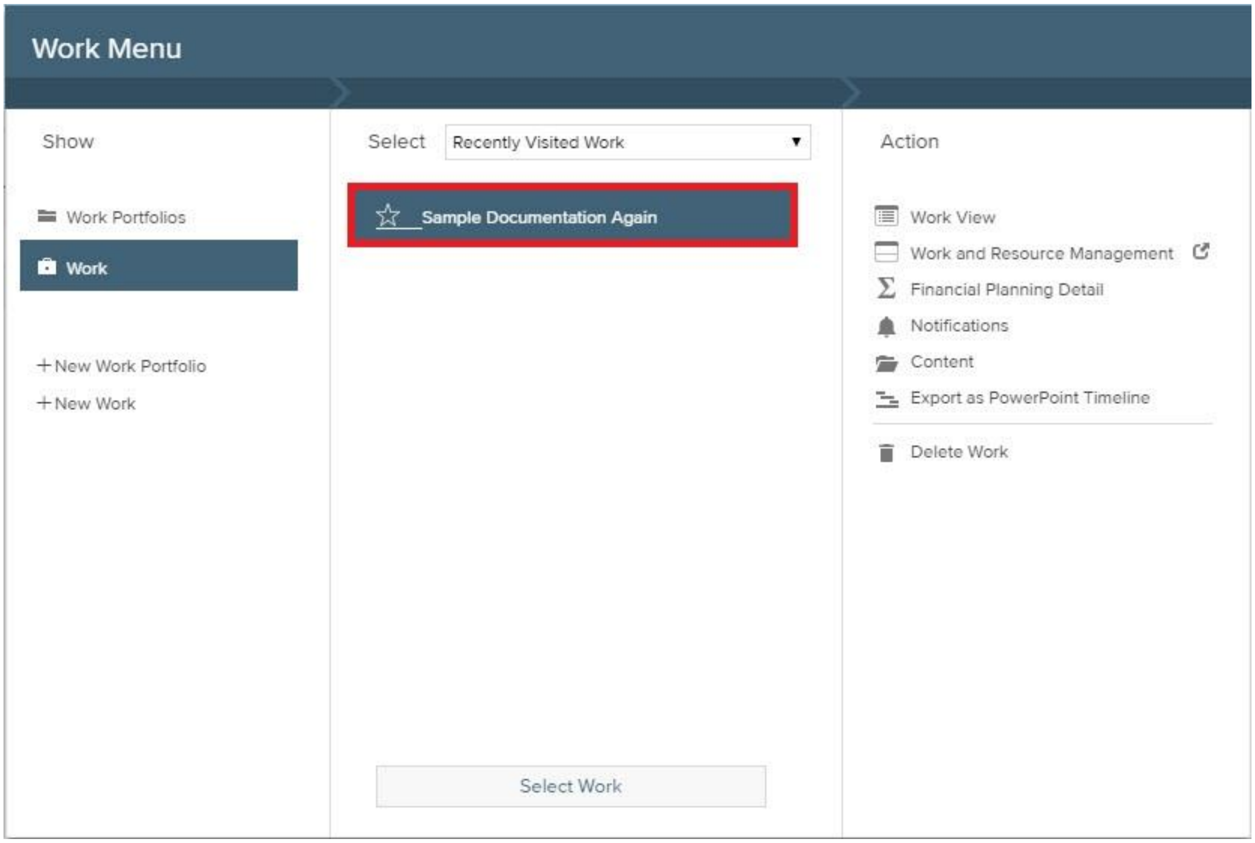
Figure PVF4. Work in the Show menu (full screen capture of the dialog box).



20.1.1.4. Click the project to be updated from the list of projects in the center **Select Work** column of the **Work Menu** dialog box to open it. See figure PVF5.

NOTE: The appearance of this screen will differ from the screen capture below.

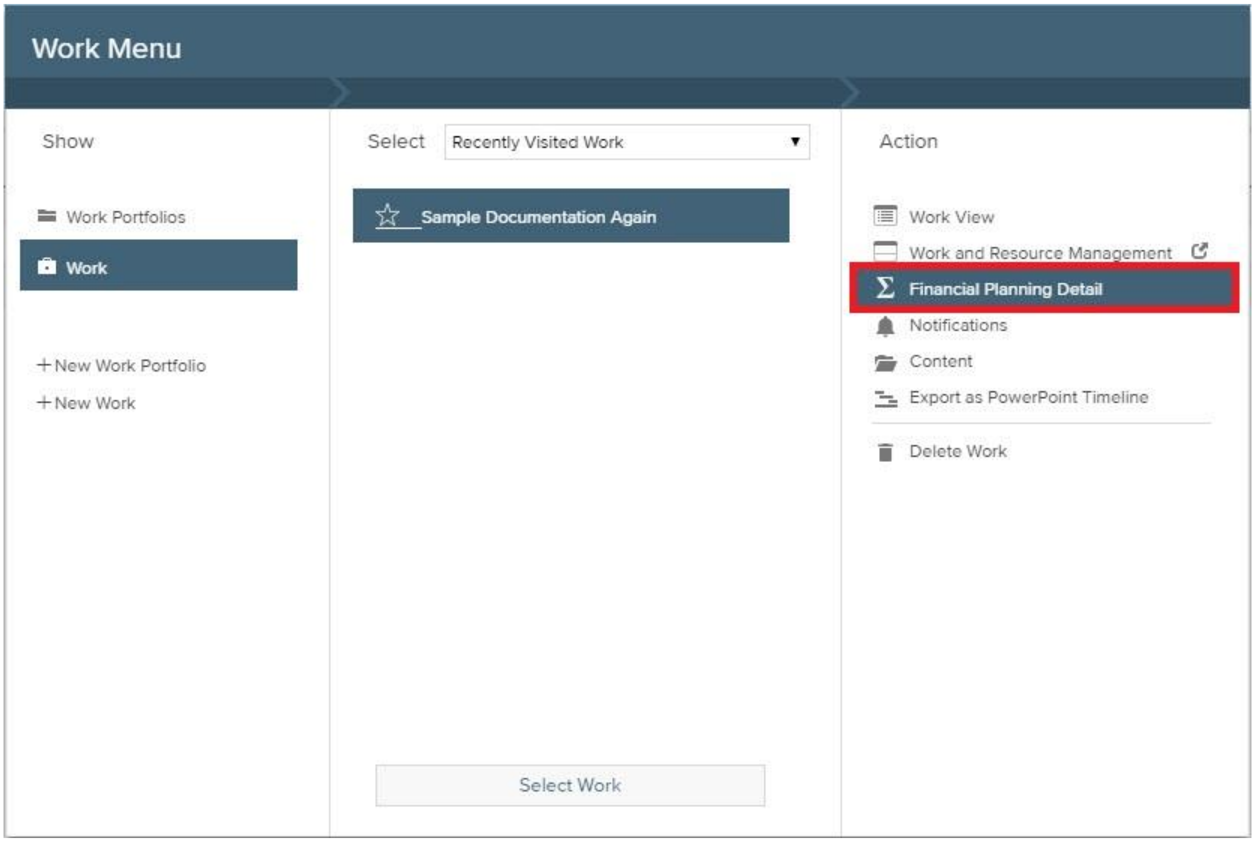
Figure PVF5. Selected project in the Select Work column (full screen capture of the dialog box).



20.1.1.5. Click Financial Planning Detail in the **Action** menu on the right side of the **Work Menu** dialog box. See figure PVF6.

NOTE: The appearance of this screen will differ from the screen capture below.

Figure PVF6. Financial Planning Detail in the Action column (full screen capture of the dialog box).



20.1.1.6. The **Financial Planning Detail** screen is displayed. See figures PVF7and PVF8.

NOTE: The appearance of these screens may differ from the screen captures below.

Figure PVF7. Financial Planning Detail screen (full screen capture).

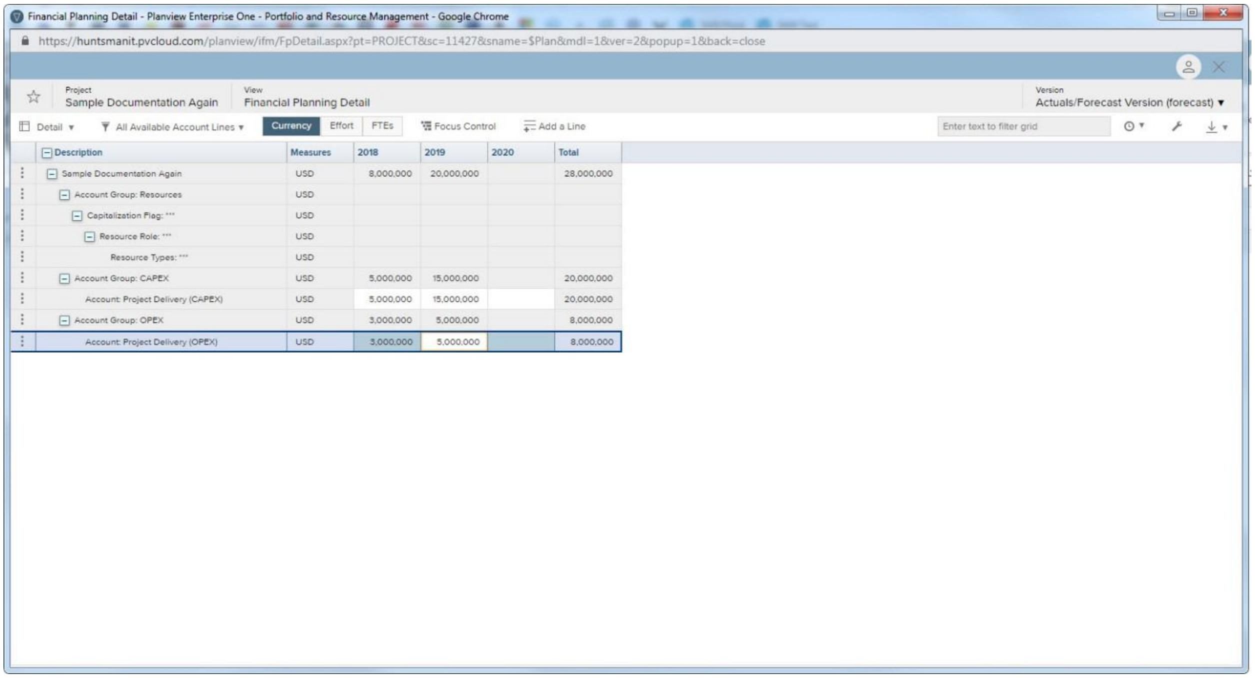
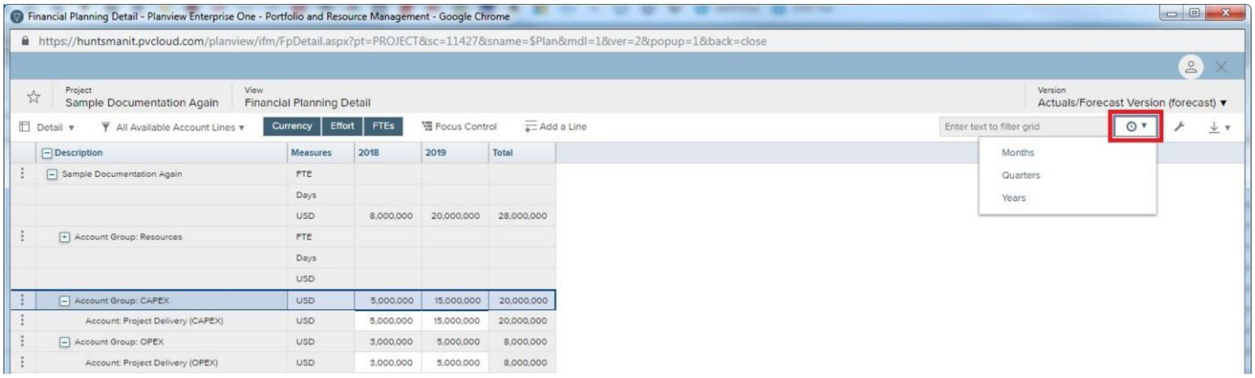


Figure PVF8. Financial Planning Detail (partial screen capture only).

20.1.1.7. Click the clock icon (or) the down caret next to it in the upper right portion of the **Financial Planning Detail** screen to open the calendar view options drop down menu. See figure PVF9.

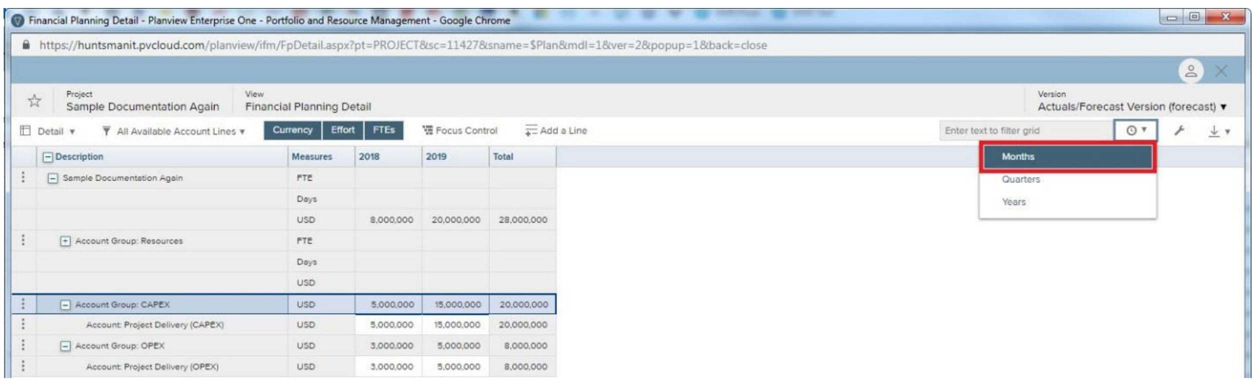
Figure PVF9. Calendar view options icon (partial screen capture only).



20.1.1.8. The period display dropdown list is displayed.

20.1.1.9. Click Months to change the **Financial Planning Detail** screen period display to months. See figure PVF10.

Figure PVF10. Period display options drop down menu (partial screen capture only).



20.1.1.10. After clicking Months in the **Financial Planning Detail** period display options dropdown list the **Financial Planning Detail** display changes to a monthly view with quarterly and yearly totals on the far right. See figures PVF11 and PVF12.

NOTE: Depending on the length of the project it may be necessary to scroll to the right to display all months for the project.

Figure PVF11. Monthly view in the Financial Planning Detail screen (partial screen capture only).

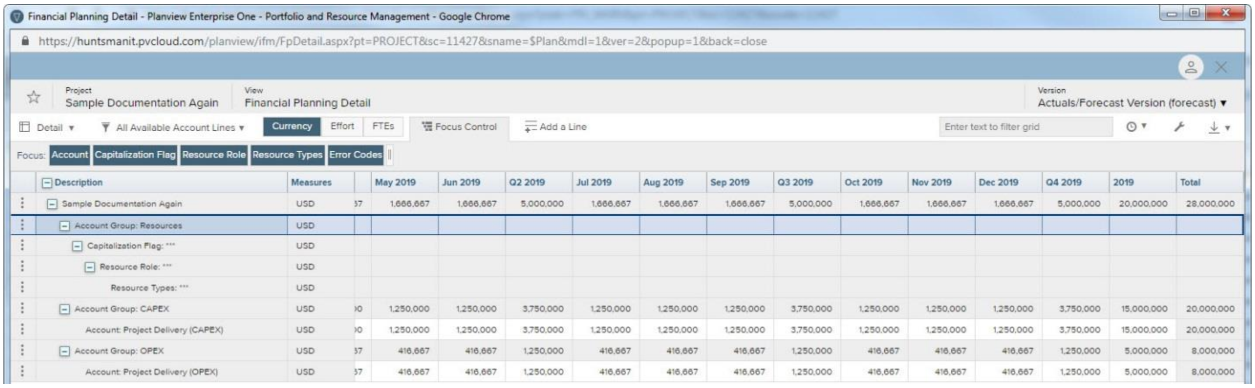
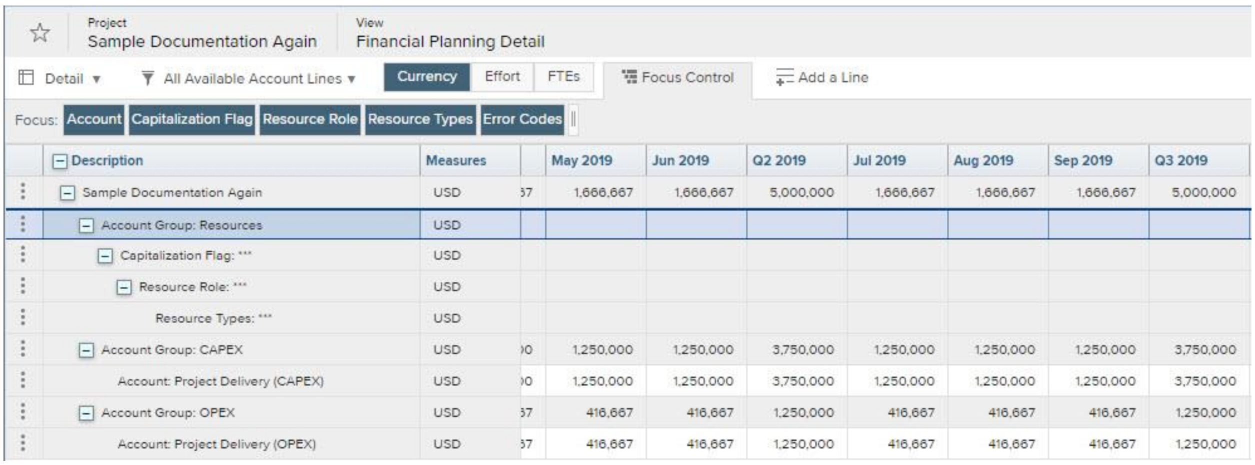


Figure PVF12. Detail view of monthly view in the Financial Planning Detail screen (partial screen capture only).



*NOTE: The amounts shaded are Actuals- **not** forecasts. Only forecast amounts unshaded (or white in the display) can be adjusted.*

20.1.1.11. Enter the (forecast total amounts) for the month(s) in the appropriate month column(s) on the **Account Project Delivery CAPEX** line.

20.1.1.12. Enter the (forecast total amounts) for the month(s) in the appropriate month column(s) on the **Account Project Delivery OPEX** line. See figures PVF13 and PVF14.

Figure PVF13. Account Project Delivery CAPEX and OPEX lines (partial screen capture only scrolled to the right).

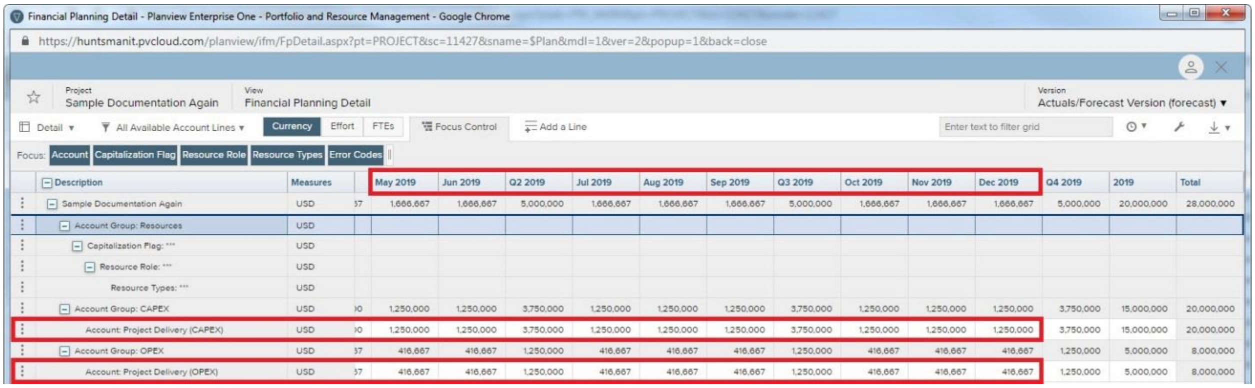
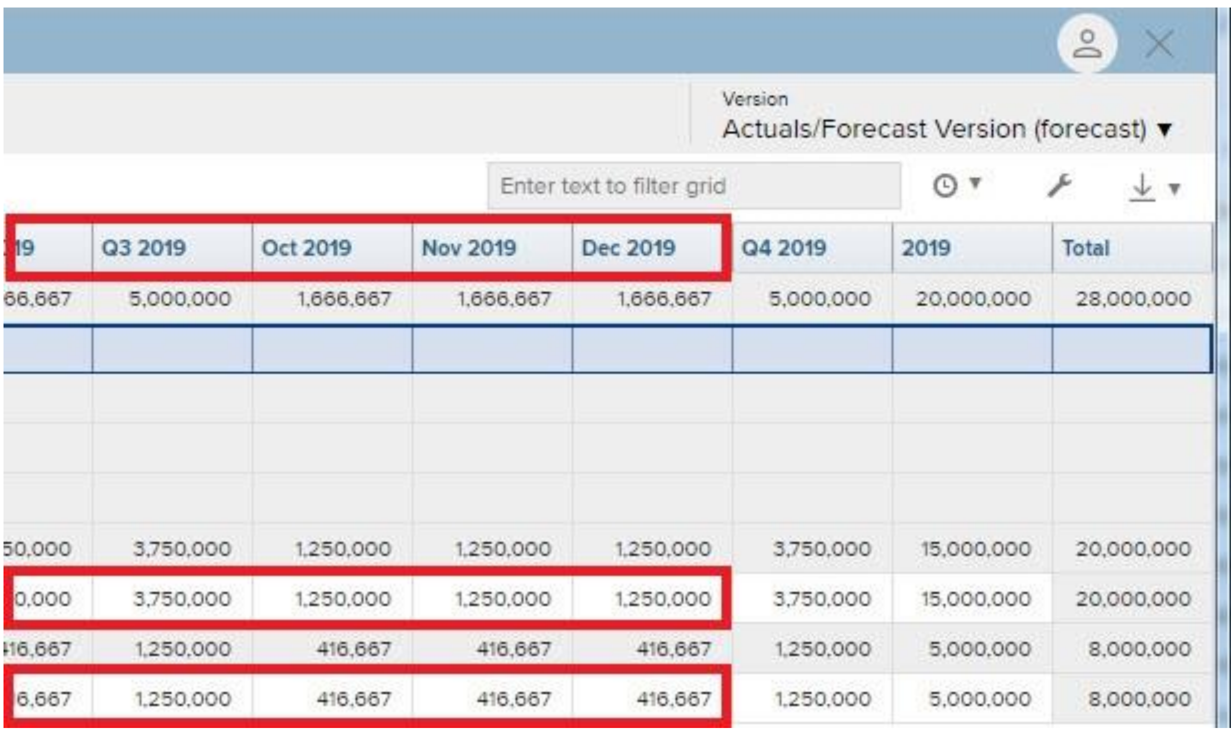


Figure PVF14. Detail view of the Account Project Delivery CAPEX and OPEX lines in the Financial Planning Detail screen (partial screen capture only scrolled to the right).

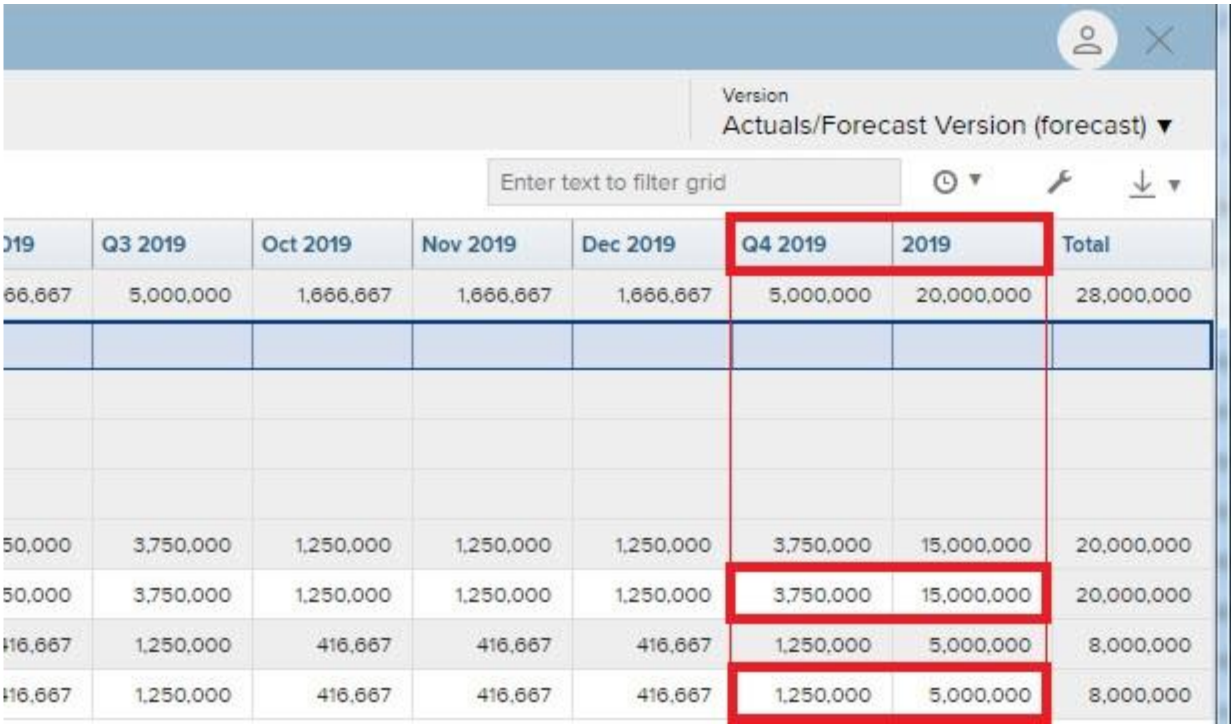


NOTE: Huntsman does not itemize these amounts. Enter total CAPEX and OPEX amounts only on the lines indicated above.

NOTE: The quarterly and yearly totals on the far right of the screen will automatically change as monthly totals are modified.

20.1.1.13. Verify the monthly, quarterly, and yearly forecast totals match the intended totals. See figure PVF15.

Figure PVF15. Quarterly and Yearly totals in the Financial Planning Details screen (partial screen capture only).

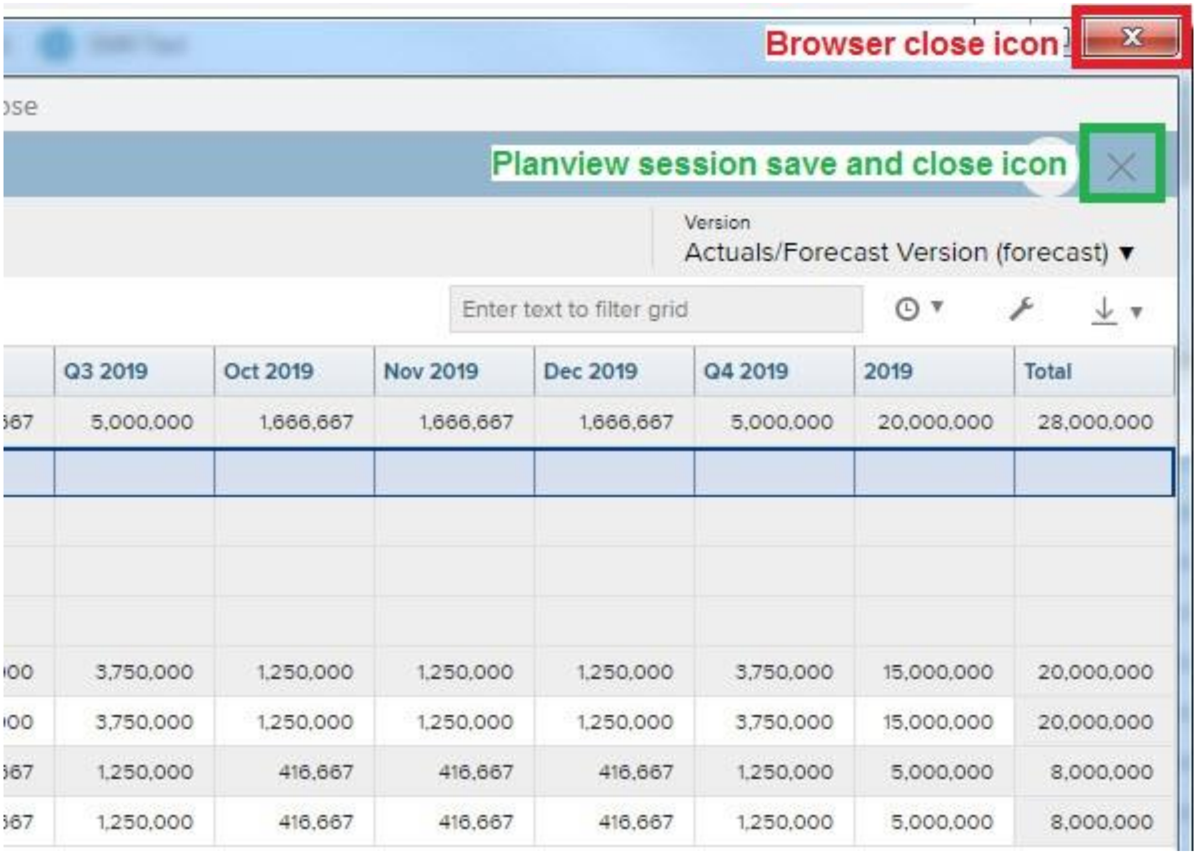


20.1.1.14. After verification, click the session save and close icon (the X) in the upper right corner of the **Financial Planning Detail** screen to close the application. See figure PVF16.

20.1.1.15. Ensure that any changes made to the financials in Planview are also completely and accurately reflected in the Financial Log, the Business Case, and any other pertinent documentation in the Hub Space for the Project.

*NOTE: **Do not click the browser close icon in the far upper right corner of the display.** This will result in the browser session closing and the loss of any updates made during the session.*

Figure PVF16. Planview Financial Planning Details session close and save icon in green with browser close icon in red (partial screen capture only).



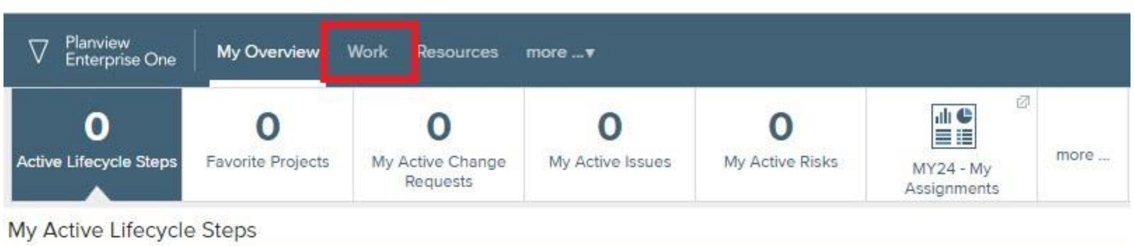
20.1.1.16. After the Planview session save and close icon is clicked the **Financial Planning Detail** screen closes and the **My Overview** screen remains on the screen.

20.2. End-of-Month Status Updates in Planview

20.2.1. Work Detail

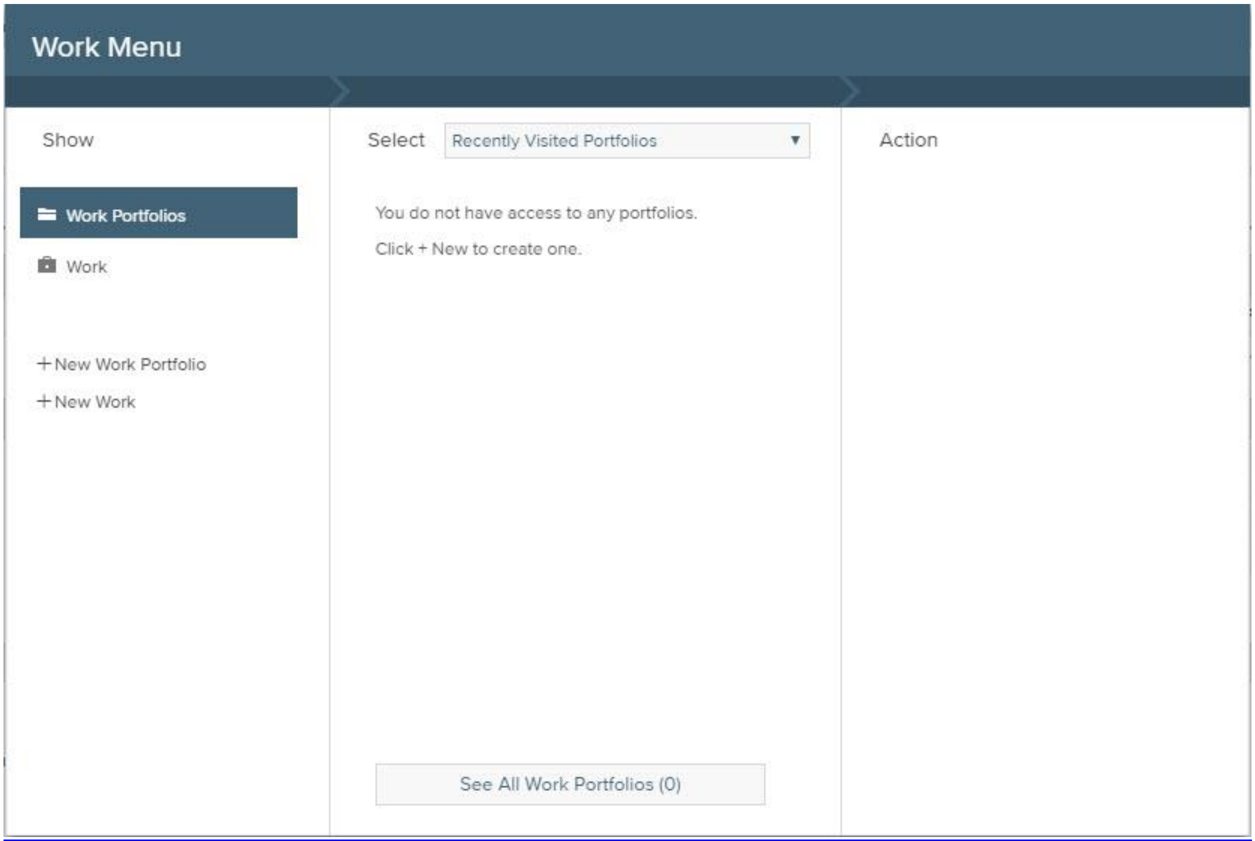
20.2.1.1. Select the **Work** hyperlink in the menu bar at the top of the page. See figure PUPS1.

Figure PUPS1. Work hyperlink in Menu Bar (partial screen capture only).



20.2.1.2. The **Work Menu** is displayed. See figure PUPS2.

Figure PUPS2. Work Menu.



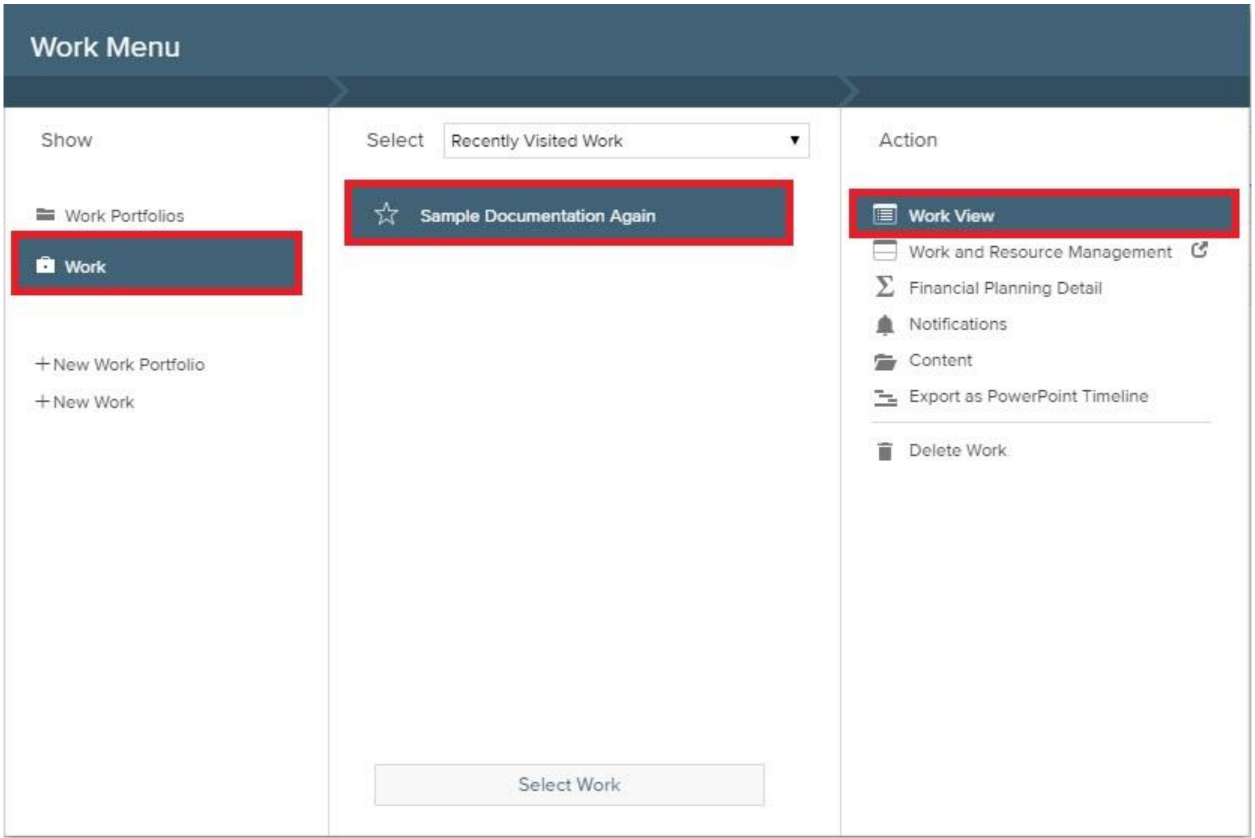
20.2.1.3. Click Work in the left **Show** column to view the projects associated with the user. The **Projects** associated with the user are displayed in the center **Select Work** column.

20.2.1.4. Click the Project to be updated from the listed **Projects** to select it.

NOTE: The appearance of the Projects listing will differ depending on the projects on which the user is working.

20.2.1.5. Click Work View in the right **Action** column to open the **Work View**. See figure PUPS3.

Figure PUPS3. Work Menu with selections.



20.2.1.6. The **Work Breakdown Structure**, **Basic**, **Project Information**, **Project Description**, **Key Dates**, **Financial Information**, and **Budget Information** data blocks are displayed in the **Overview** tab of the **Work Detail- Work View** screen. See figures PUPS4 and PUPS5.

Figure PUPS4. Work View with Work View, Overview, and Work Detail highlighted (partial screen capture- additional data blocks are displayed when scrolling down).

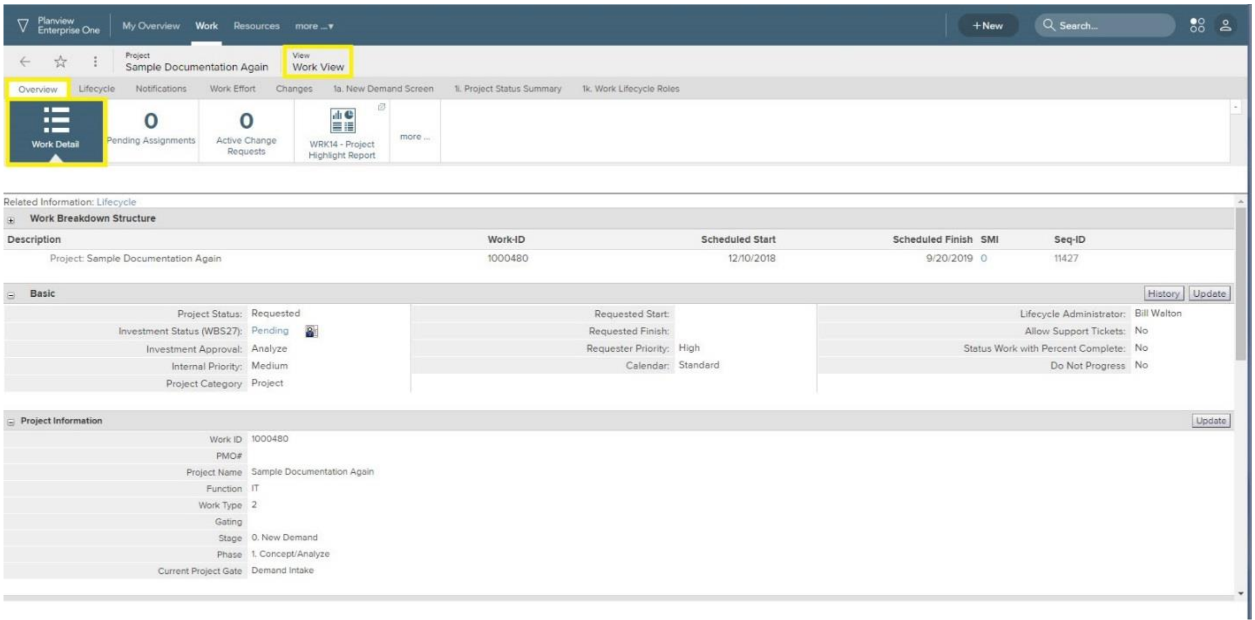
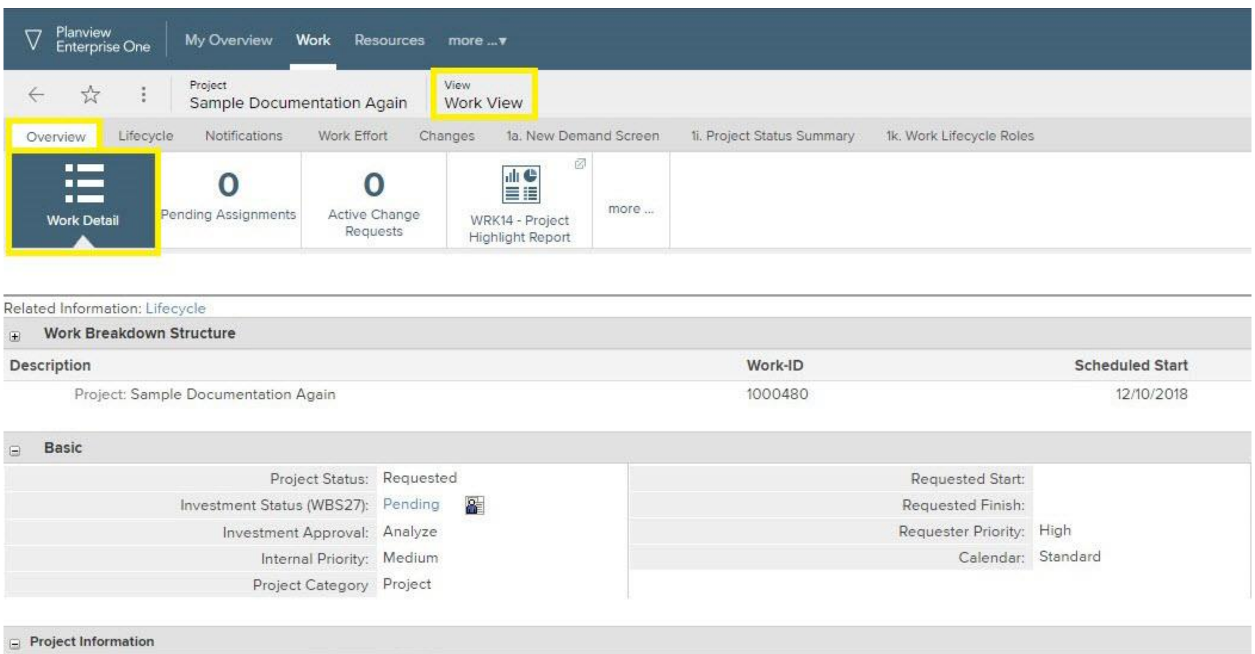


Figure PUPS5. Close up of Work View with Work View, Overview, and Work Detail highlighted (partial screen capture only- additional data blocks are displayed when scrolling down and right).

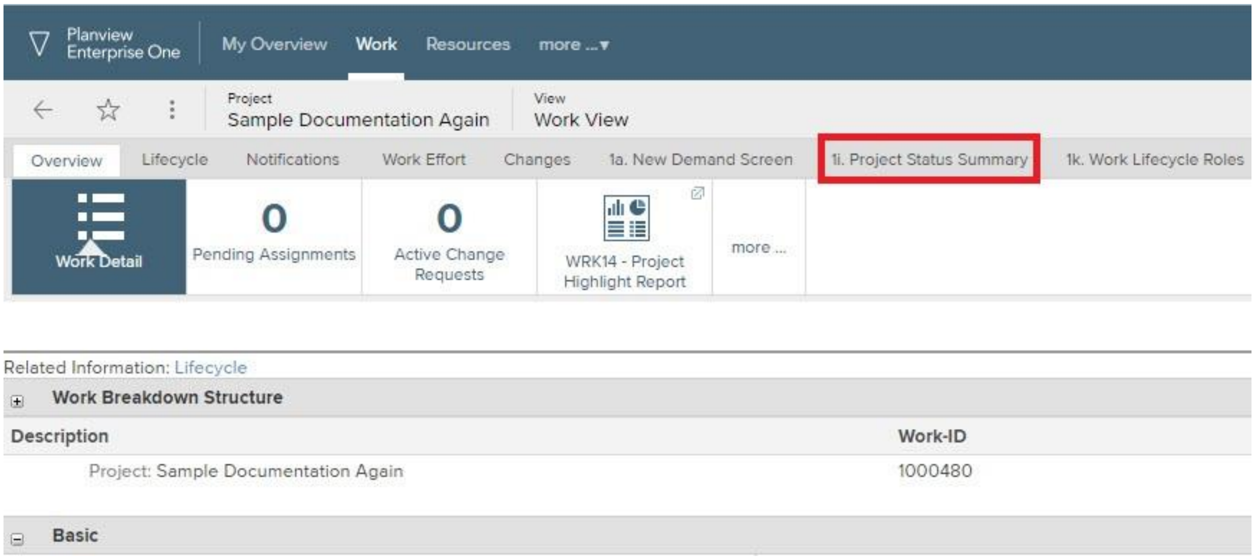


NOTE: This information is gradually populated and/or updated as the project progresses through the workflow in Planview.

NOTE: The appearance of these menus may differ based on user roles and permissions.

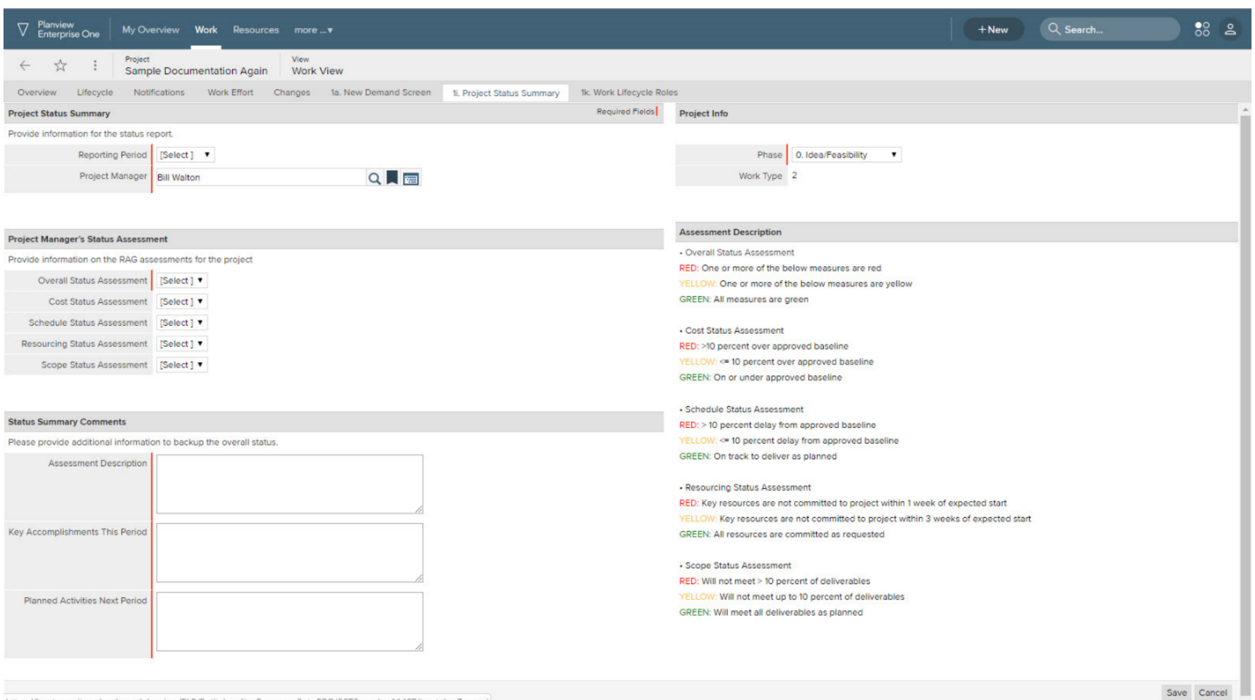
20.2.1.7. On the same row as **Overview** near the top of the display is the **View** selection menu. Click Project Status Summary in the **View** menu to open the **Project Status Summary** screen. See figure PUPS6.

Figure PUPS6. Project Status Summary highlighted in the View menu (partial screen capture only).



20.2.1.8. The **Project Status Summary** page for the Project is displayed. See figure PUPS7.

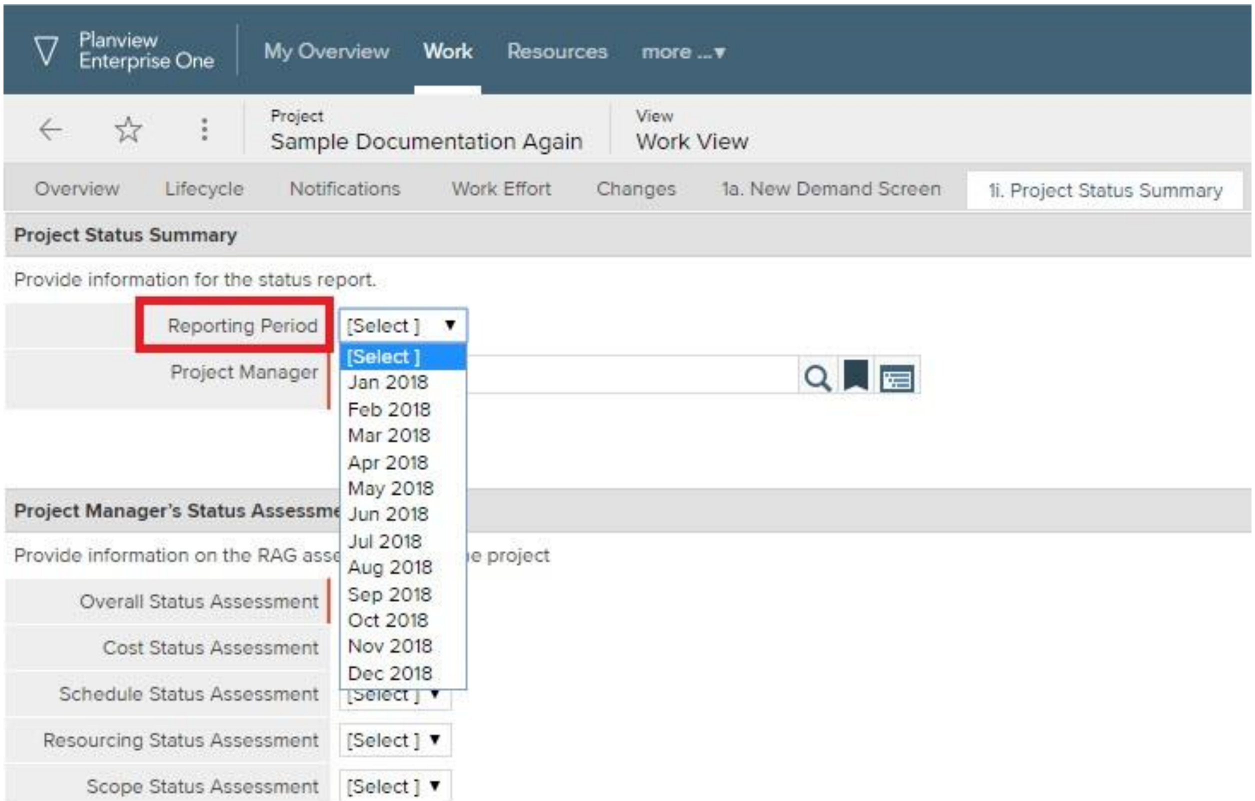
Figure PUPS7. Project Status Summary.



20.2.2. Project Status Summary

20.2.2.1. Select a **Reporting Period** by clicking the down caret next to the **Reporting Period** data selection field and clicking (the current Reporting Period of the project) from the options listed in the dropdown menu to select it. See figure PUPS8.

Figure PUPS8. Reporting Period selection options (partial screen capture only).



20.2.2.2. The **Project Manager** field is prefilled.

NOTE: The Project Manager assigned to the project can be changed here if necessary.

20.2.3. Project Manager's Status Assessment

20.2.3.1. Review the **Assessment Description** guide located on the right side of the display under **Project Info**. See figure PUPS9.

Figure PUPS9. Assessment Description (partial screen capture only).

Assessment Description

• Overall Status Assessment

RED: One or more of the below measures are red

YELLOW: One or more of the below measures are yellow

GREEN: All measures are green

• Cost Status Assessment

RED: >10 percent over approved baseline

YELLOW: <= 10 percent over approved baseline

GREEN: On or under approved baseline

• Schedule Status Assessment

RED: > 10 percent delay from approved baseline

YELLOW: <= 10 percent delay from approved baseline

GREEN: On track to deliver as planned

• Resourcing Status Assessment

RED: Key resources are not committed to project within 1 week of expected start

YELLOW: Key resources are not committed to project within 3 weeks of expected start

GREEN: All resources are committed as requested

• Scope Status Assessment

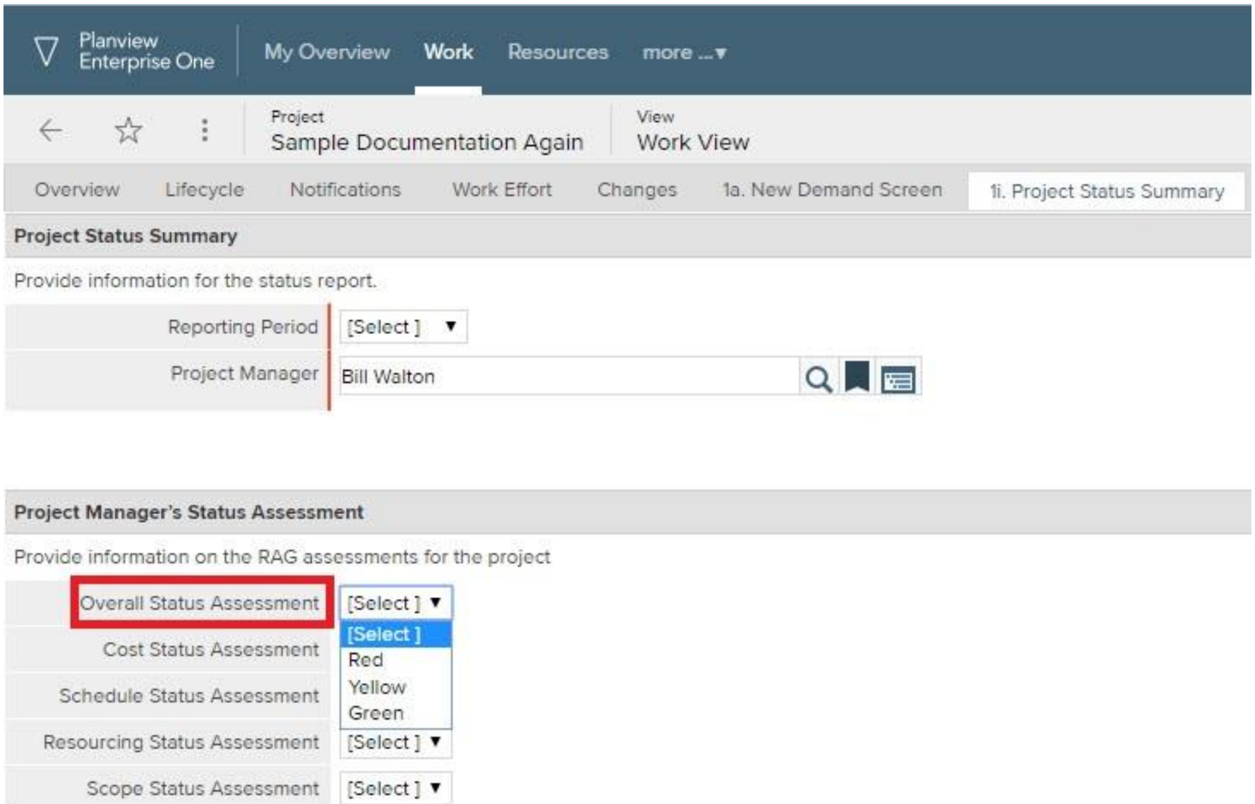
RED: Will not meet > 10 percent of deliverables

YELLOW: Will not meet up to 10 percent of deliverables

GREEN: Will meet all deliverables as planned

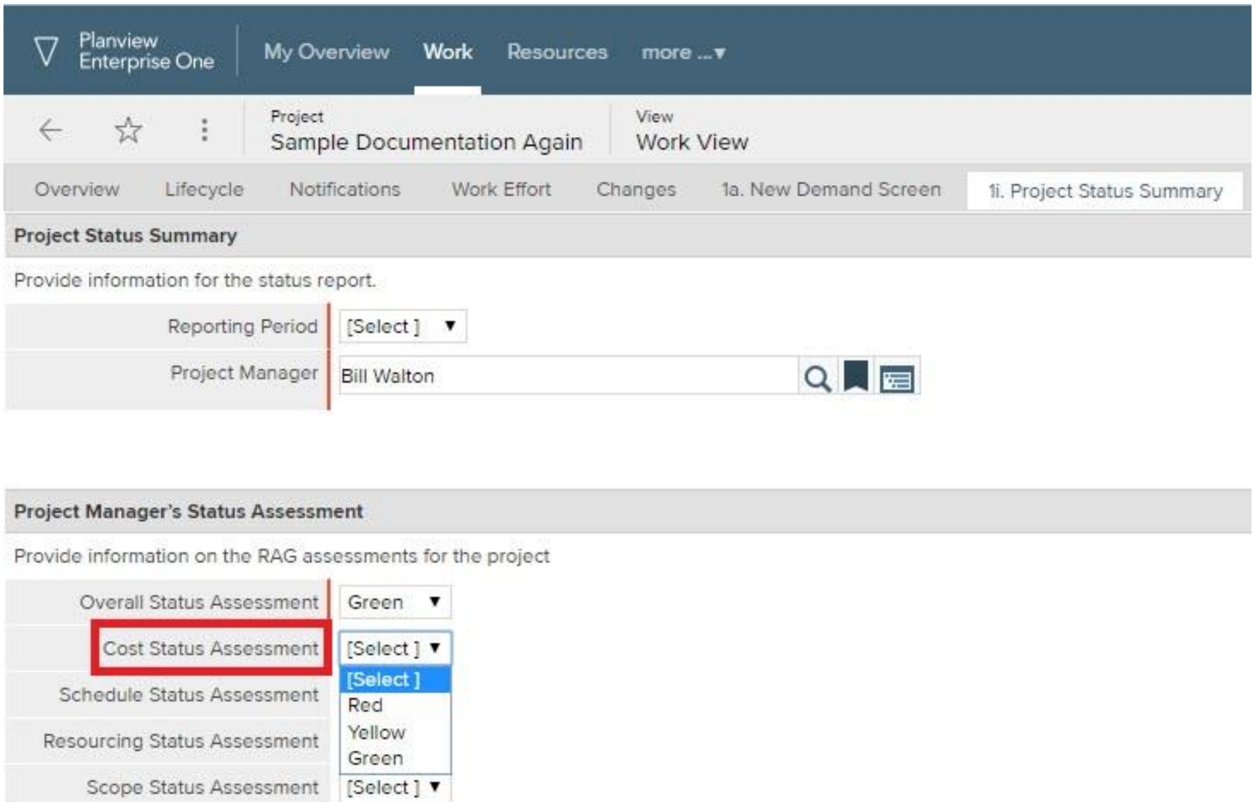
20.2.3.2. Following the published assessment guidelines, select a response for **Overall Status Assessment** by clicking the down caret next to the **Overall Status Assessment** data selection field and clicking (the current Overall Status Assessment of the project) from the options listed in the dropdown menu to select it. See figure PUPS10.

Figure PUPS10. Overall Status Assessment selection options (partial screen capture only).



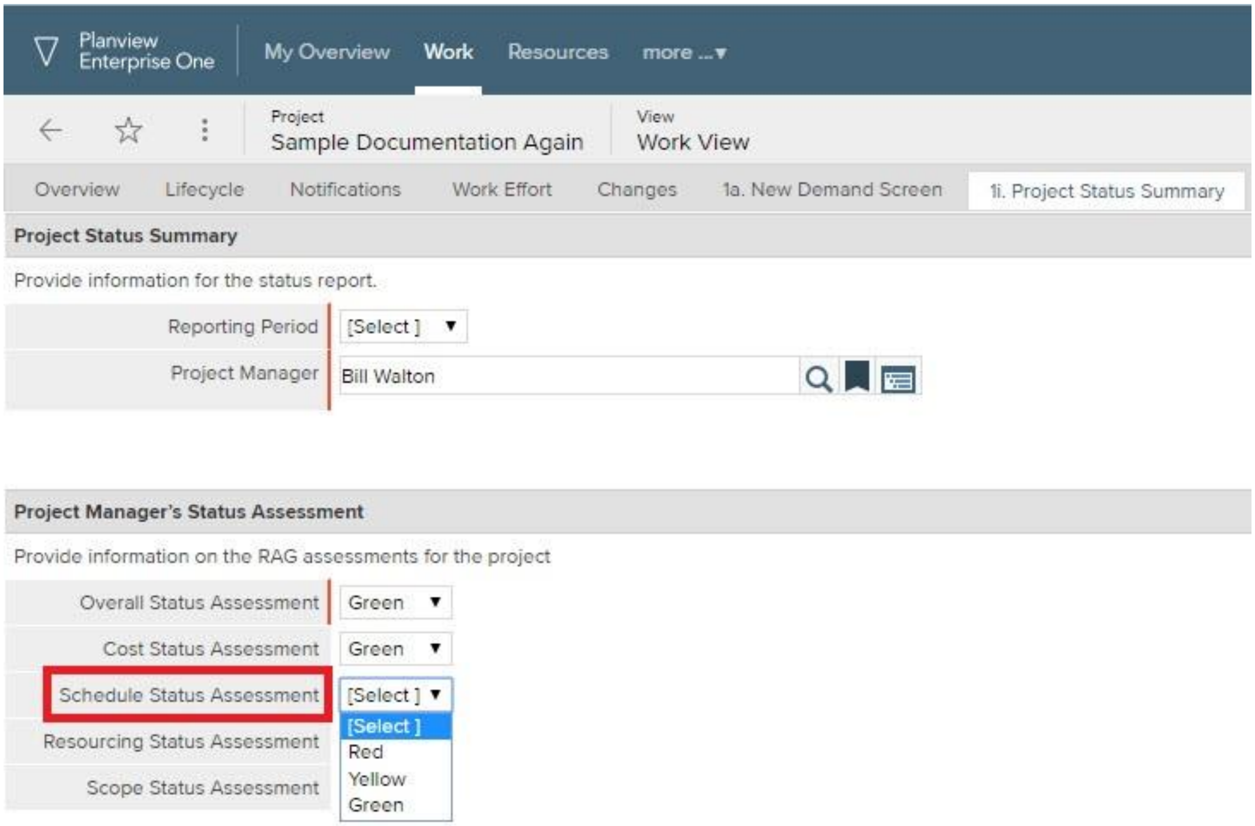
20.2.3.3. Following the published assessment guidelines, select a response for **Cost Status Assessment** by clicking the down caret next to the **Cost Status Assessment** data selection field and clicking (the current Cost Status Assessment of the project) from the options listed in the dropdown menu to select it. See figure PUPS11.

Figure PUPS11. Cost Assessment selection options (partial screen capture only).



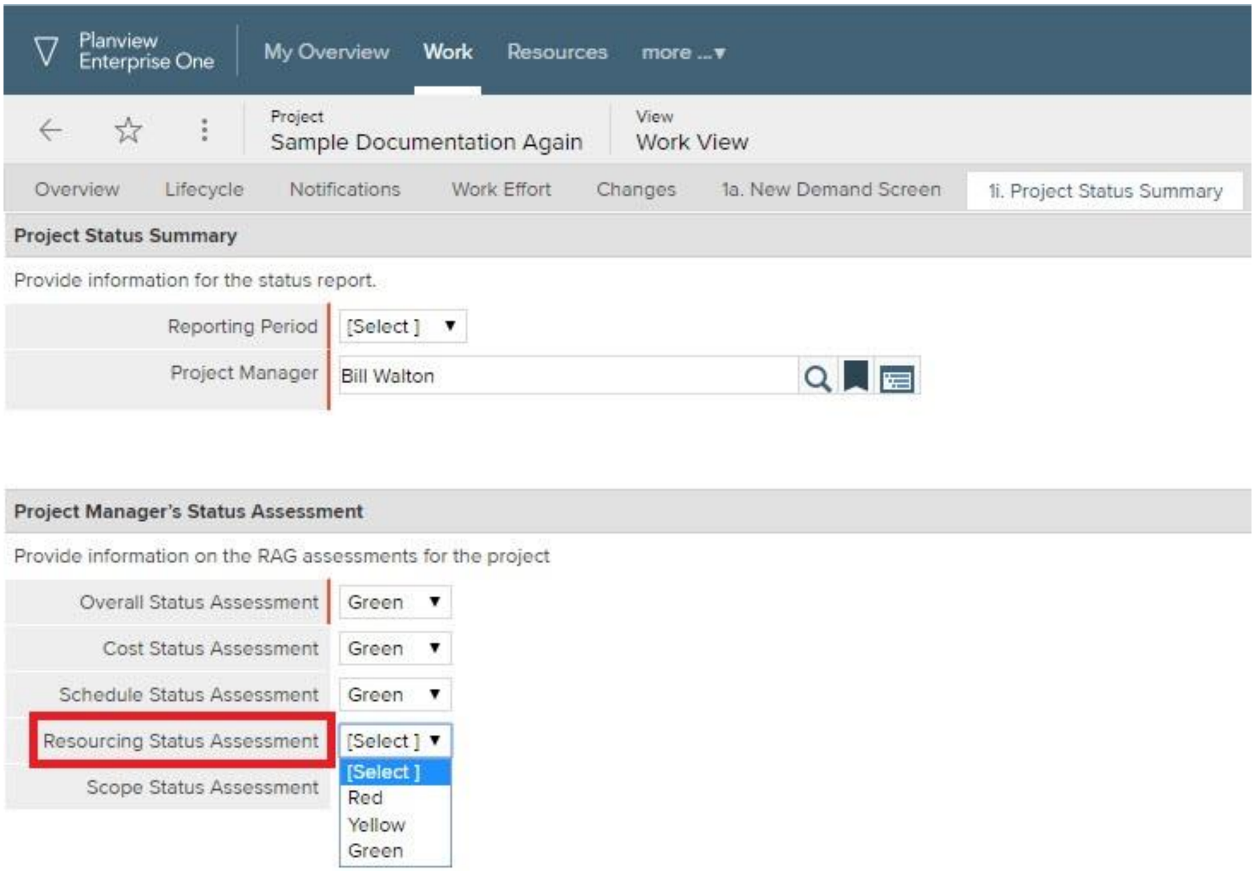
20.2.3.4. Following the published assessment guidelines, select a response for **Schedule Status Assessment** by clicking the down caret next to the **Schedule Status Assessment** data selection field and clicking (<u>the current Schedule Status Assessment of the project</u>) from the options listed in the dropdown menu to select it. See figure PUPS12.

Figure PUPS12. Schedule Status Assessment selection options (partial screen capture only).



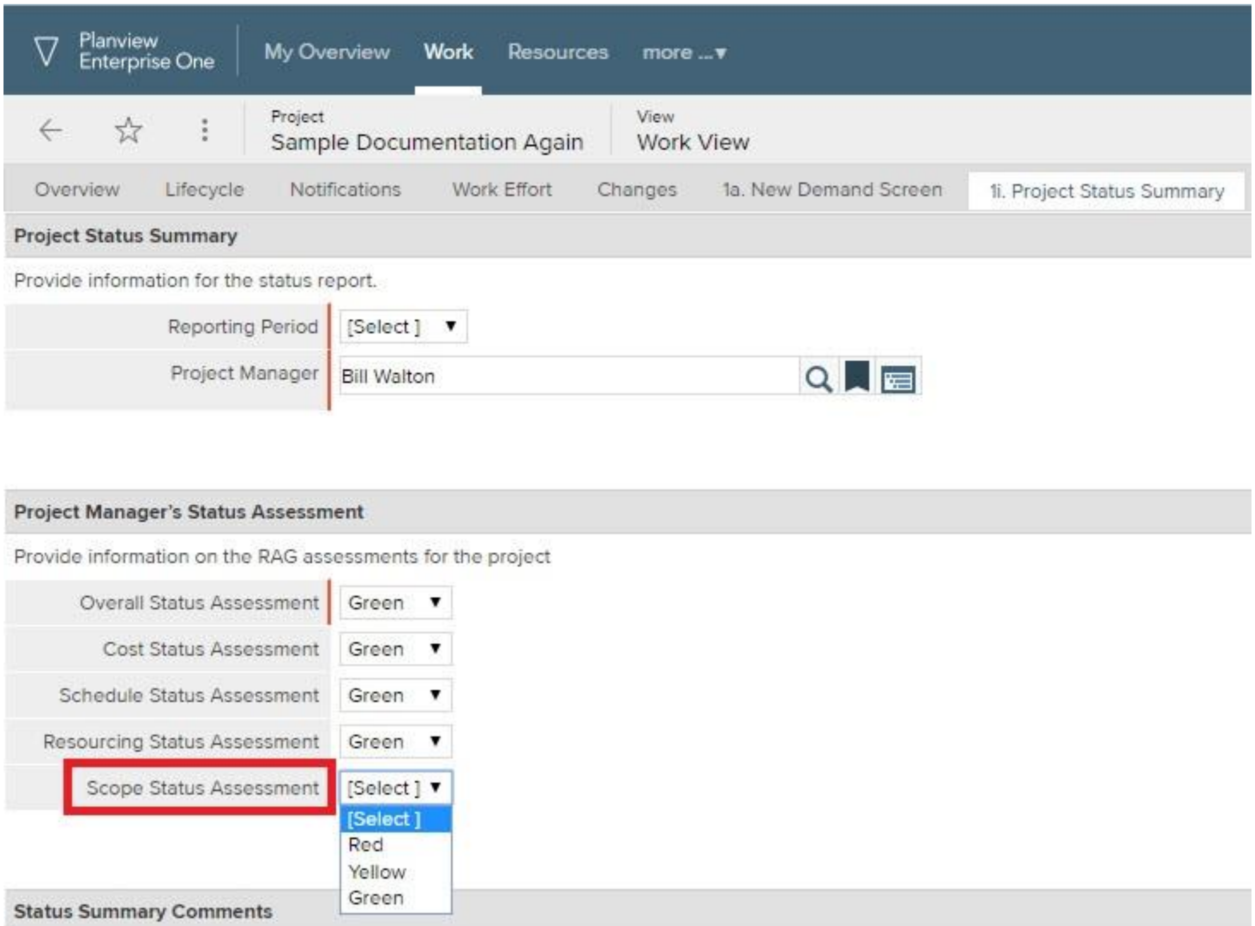
20.2.3.5. Following the published assessment guidelines, select a response for **Resourcing Status Assessment** by clicking the down caret next to the **Resourcing Status Assessment** data selection field and clicking (the current Resourcing Status Assessment of the project) from the options listed in the dropdown menu to select it. See figure PUPS13.

Figure PUPS13. Resourcing Status Assessment selection options (partial screen capture only).



20.2.3.6. Following the published assessment guidelines, select a response for **Scope Status Assessment** by clicking the down caret next to the **Scope Status Assessment** data selection field and clicking (the current Scope Status Assessment of the project) from the options listed in the dropdown menu to select it. See figure PUPS14.

Figure PUPS14. Scope Status Assessment selection options (partial screen capture only).



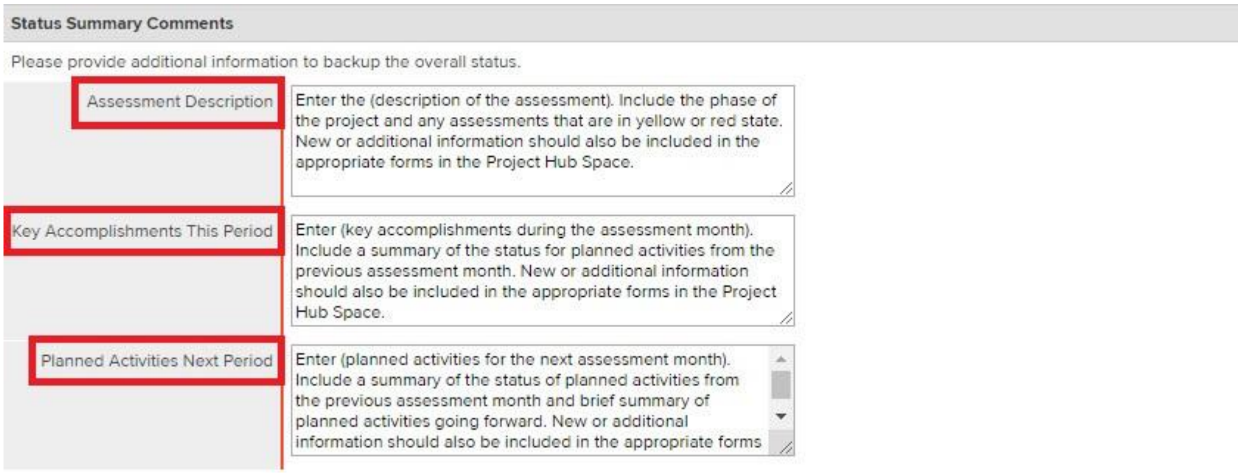
20.2.4. **Status Summary Comments**

20.2.4.1. Click in the **Assessment Description** data entry field to enter the (<u>description of the assessment</u>). Include the phase of the project and mention any assessments that are in yellow or red state. New or additional information should also be included in the appropriate forms in the Project Hub Space.

20.2.4.2. Click in the **Key Accomplishments This Period** data entry field to enter (<u>key accomplishments during the assessment month</u>). Include a summary of the status for planned activities from the previous assessment month. New or additional information should also be included in the appropriate forms in the Project Hub Space.

20.2.4.3. Click in the **Planned Activities Next Period** data entry field to enter (<u>planned activities for the next assessment month</u>). Include a summary of the status of planned activities from the previous assessment month. New or additional information should also be included in the appropriate forms in the Project Hub Space. See figure PUPS15.

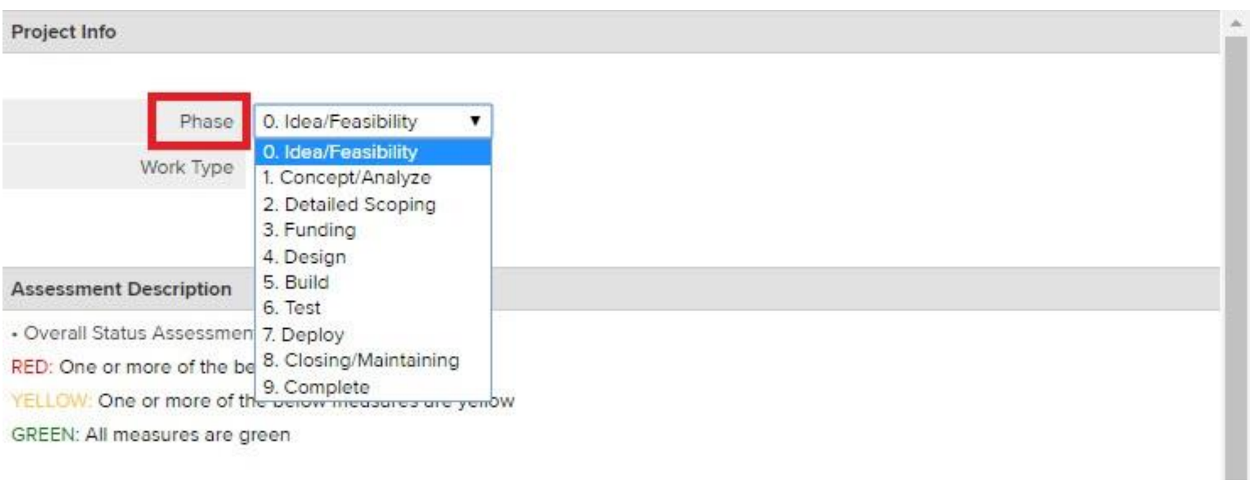
Figure PUPS15. Status Summary Comments completed (partial screen capture only).



20.2.5. Project Info

20.2.5.1. Select the current Project **Phase** by clicking the down caret next to the **Phase** data selection field and clicking (the current Project Phase) from the options listed in the dropdown menu to select it. See figure PUPS16.

Figure PUPS16. Project Phase selection options (partial screen capture only).

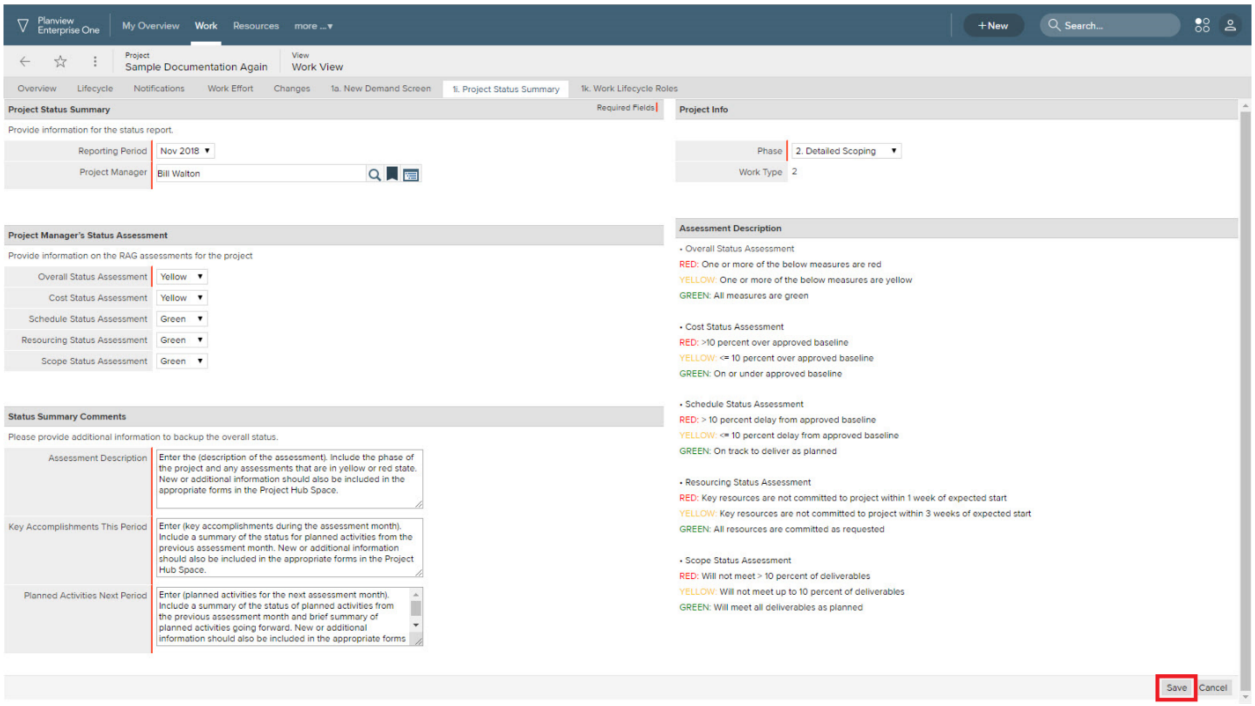


20.2.5.2. The **Work Type** field is prefilled.

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

20.2.5.4. After verification click Save in the lower right corner of the **Project Status Summary** screen. See figure PUPS17.

Figure PUPS17. Completed Project Status Summary with highlighted Save button.

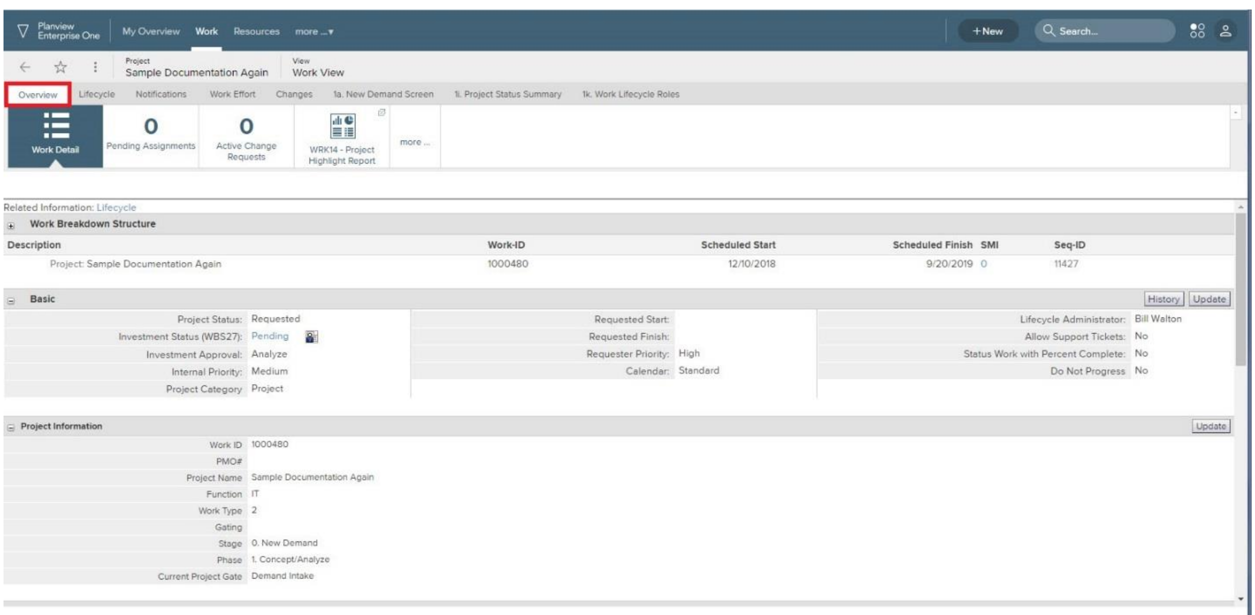


20.2.5.5. After Save is clicked in the lower right corner of the **Project Status Summary** screen the Project Status Summary screen is displayed with saved data.

20.2.6. Attribute History

20.2.6.1. Click Overview in the **View** menu to return to the **Overview** tab of the **Work Detail- Work View** screen. See figure PUPS18.

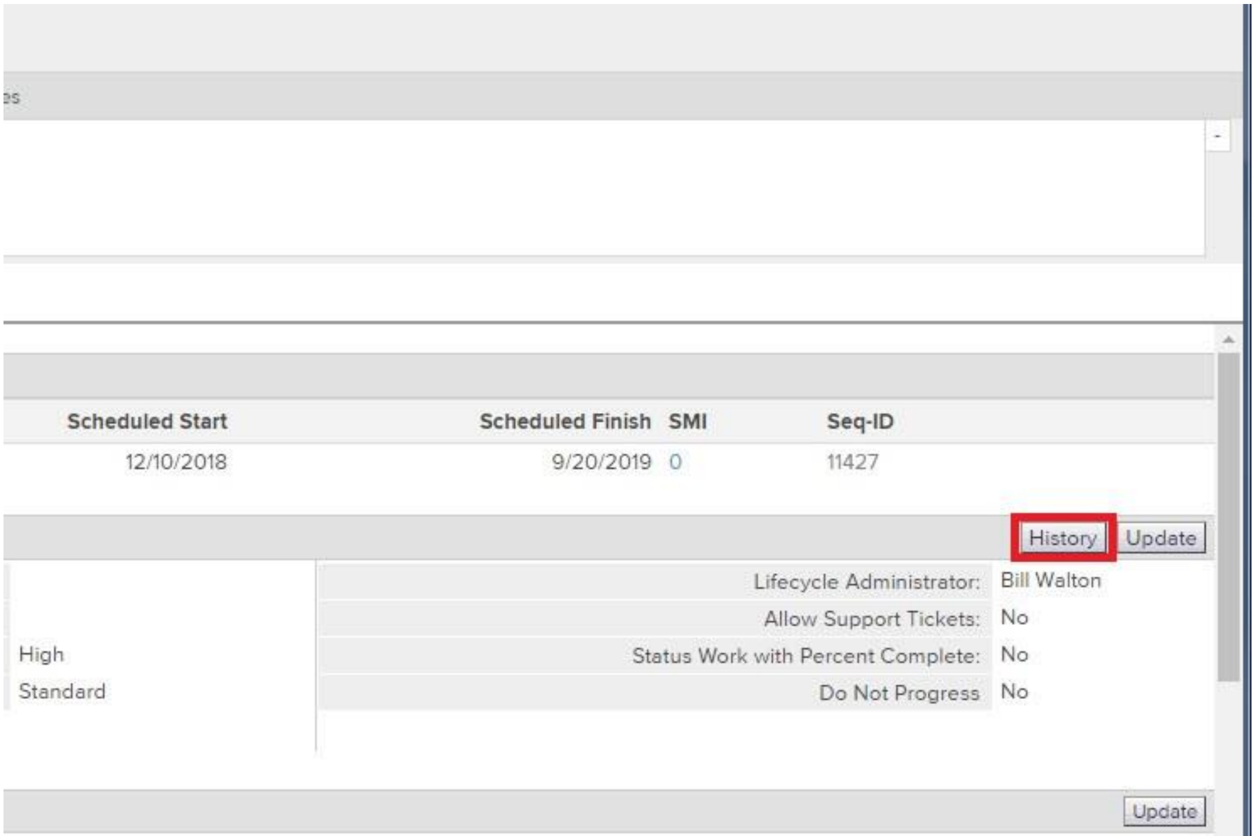
Figure PUPS18. Overview tab of the Work Detail- Work View screen.



20.2.6.2. The **View** menu in the **Overview** tab of the **Work Detail- Work View** screen is displayed.

20.2.6.3. Click History on the far-right side of the **Basic** data block on the **Overview** screen. See figure PUPS19.

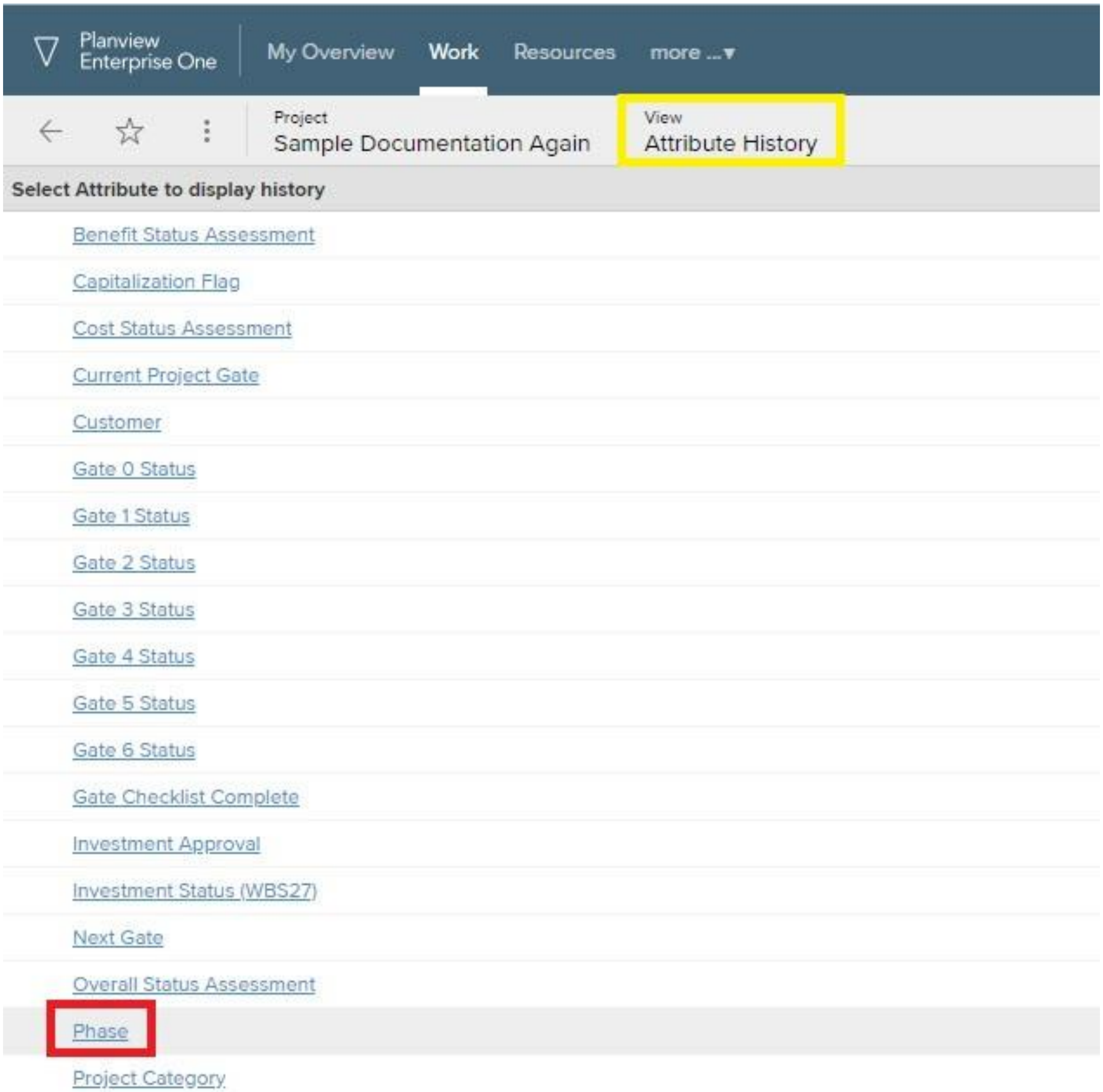
Figure PUPS19. History in the Basic data block on the Overview screen (partial screen capture of the right side only).



20.2.6.4. The **Attribute History- Select Attribute** screen is displayed.

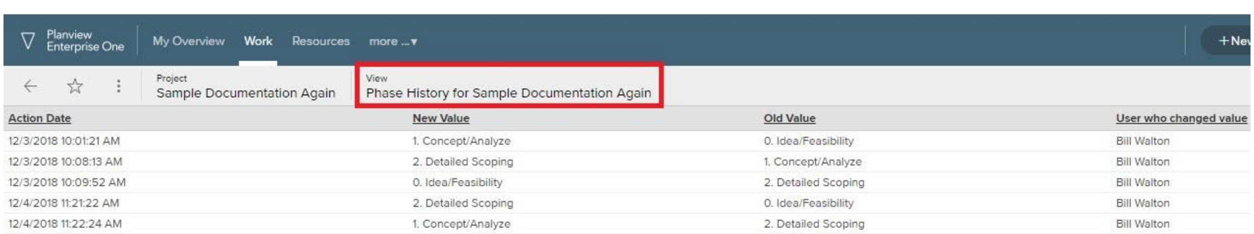
20.2.6.5. Click on an Attribute in the **Attribute History- Select Attribute** screen to view the **History** for that Attribute. See figure PUPS20.

Figure PUPS20. Attribute History- Select Attribute screen (partial screen capture of left side only).



20.2.6.6. The **Attribute History** screen for the selected **Attribute** is displayed (in this example the Phase attribute). See figure PUPS21.

Figure PUPS21. Phase attribute History for the selected project screen.

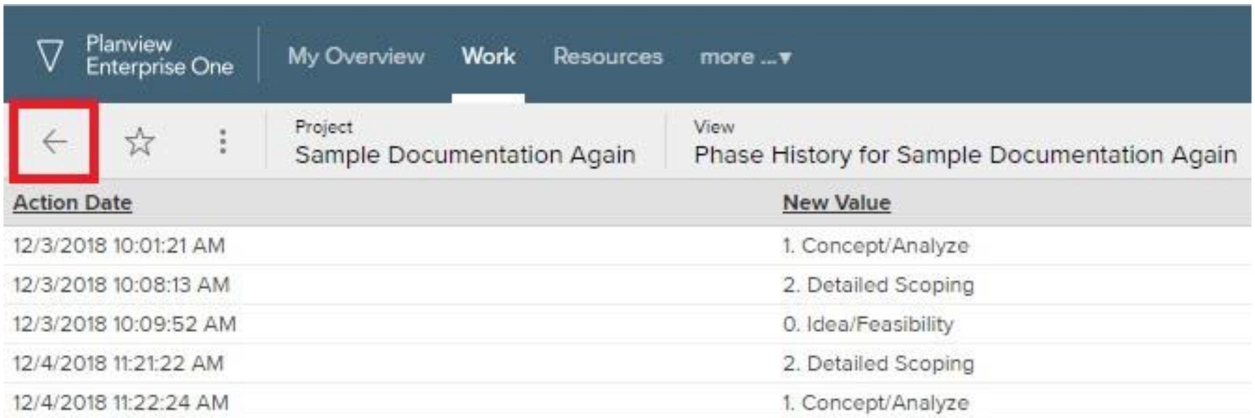


Action Date	New Value	Old Value	User who changed value
12/3/2018 10:01:21 AM	1. Concept/Analyze	0. Idea/Feasibility	Bill Walton
12/3/2018 10:08:13 AM	2. Detailed Scoping	1. Concept/Analyze	Bill Walton
12/3/2018 10:09:52 AM	0. Idea/Feasibility	2. Detailed Scoping	Bill Walton
12/4/2018 11:21:22 AM	2. Detailed Scoping	0. Idea/Feasibility	Bill Walton
12/4/2018 11:22:24 AM	1. Concept/Analyze	2. Detailed Scoping	Bill Walton

20.2.6.7. Verify the changes made to the attribute appear in the **History** screen for the attribute.

20.2.6.8. Click the left-facing arrow on the upper left side of the **Attribute History** screen to return to the **Attribute History- Select Attribute** screen. See figure PUPS22.

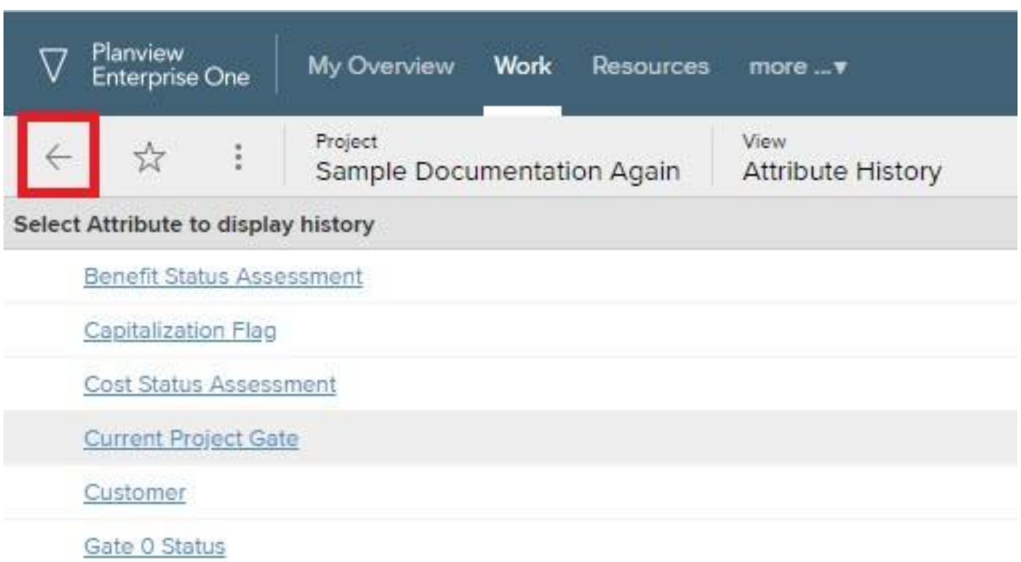
Figure PUPS22. Left arrow in Attribute History screen (partial screen capture of the upper left side of the screen only).



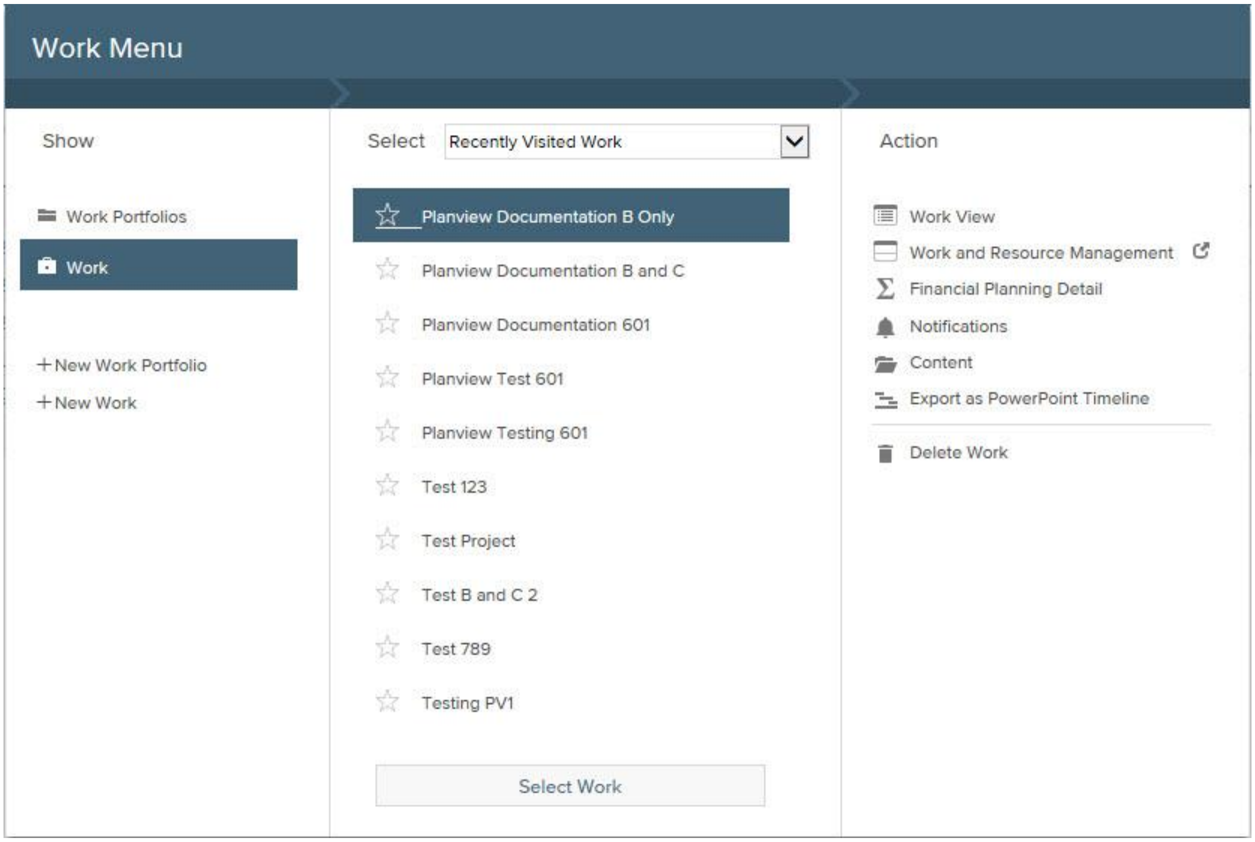
20.2.6.9. The **Attribute History- Select Attribute** screen is displayed.

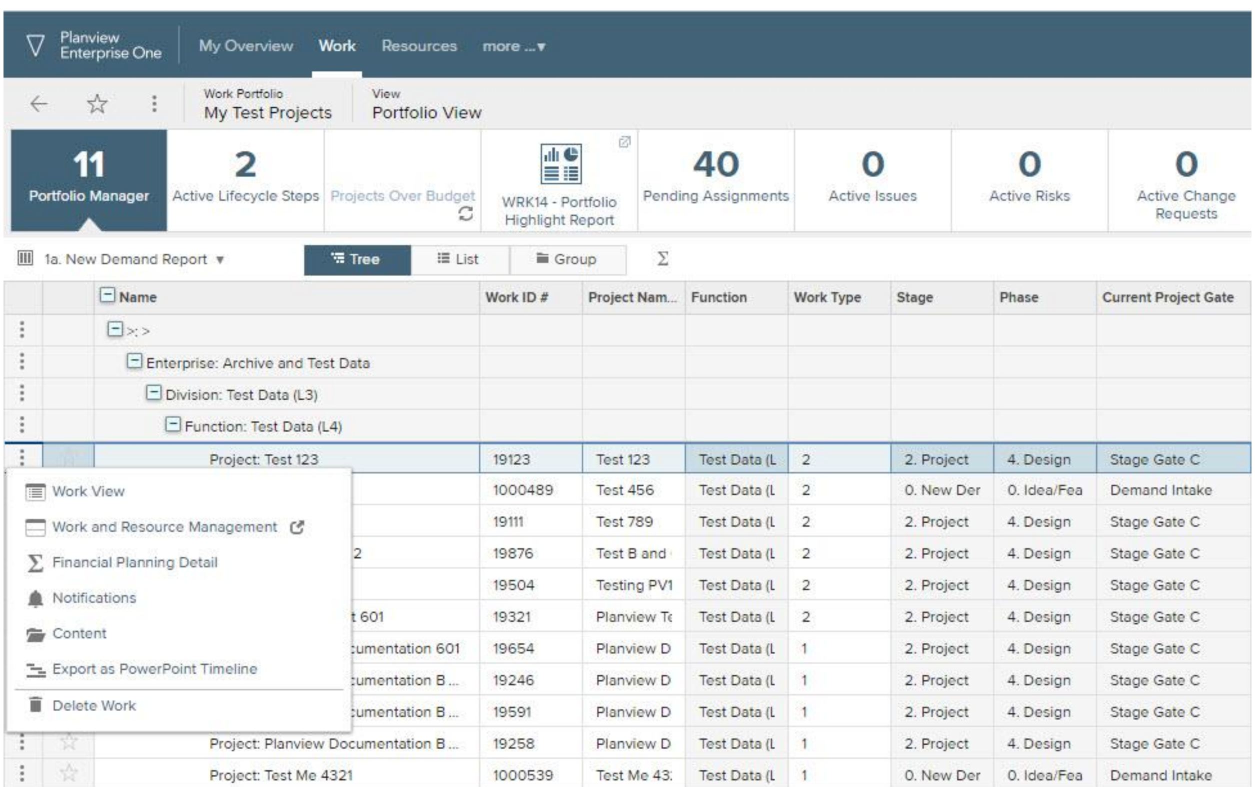
20.2.6.10. Click the left-facing arrow on the upper left side of the **Attribute History- Select Attribute** screen to return to the **Overview** screen. See figure PUPS23.

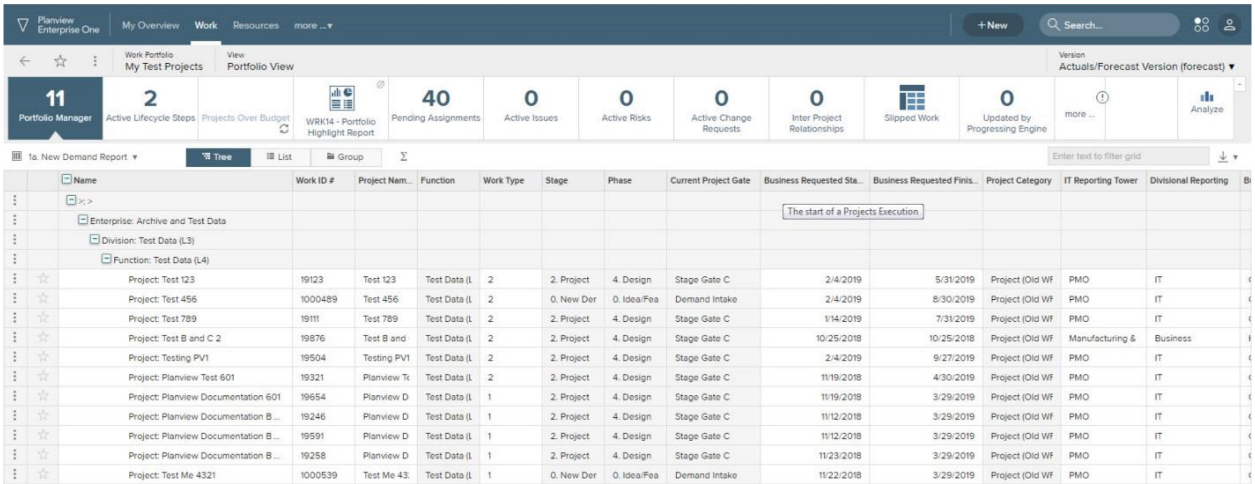
Figure PUPS23. Left arrow in the Attribute History- Select Attribute screen (partial screen capture of the upper left side of the screen only).



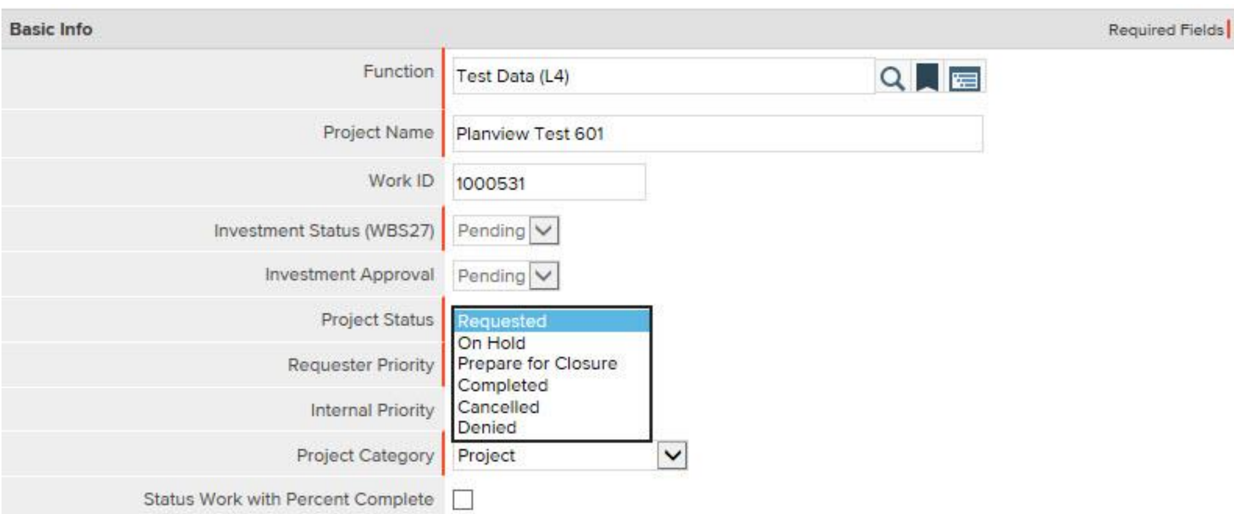
20.2.6.11. The **Overview** screen for the selected project is displayed.


Work Menu
Show
Work Portfolios
Work
+New Work Portfolio
+New Work
Select
Recently Visited Work
Planview Documentation B Only
Planview Documentation B and C
Planview Documentation 601
Planview Test 601
Planview Testing 601
Test 123
Test Project
Test B and C 2
Test 789
Testing PV1
Select Work
Action
Work View
Work and Resource Management
Financial Planning Detail
Notifications
Content
Export as PowerPoint Timeline
Delete Work


Planview Enterprise One
My Overview
Work
Resources
more ...
Work Portfolio
My Test Projects
View
Portfolio View
11
Portfolio Manager
2
Active Lifecycle Steps
Projects Over Budget
WRK14 - Portfolio Highlight Report
40
Pending Assignments
0
Active Issues
0
Active Risks
0
Active Change Requests
1a. New Demand Report
Tree
List
Group
Name
Work ID #
Project Nam...
Function
Work Type
Stage
Phase
Current Project Gate
Enterprise: Archive and Test Data
Division: Test Data (L3)
Function: Test Data (L4)
Project: Test 123
19123
Test 123
Test Data (L
2
2. Project
4. Design
Stage Gate C
Work View
Work and Resource Management
Financial Planning Detail
Notifications
Content
Export as PowerPoint Timeline
Delete Work
1000489
Test 456
0. New Der
0. Idea/Fea
Demand Intake
19111
Test 789
19876
Test B and
19504
Testing PV1
19321
Planview Te
19654
Planview D
19246
19591
Project: Planview Documentation B ...
19258
Project: Test Me 4321
1000539
Test Me 43:



Overview- Assume Complete



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