Appendix S. Case Scenario

1. **After the quarterly meeting of the marketing department, it has been decided that a new project is to be launched. The marketing head is responsible to spearhead the new project.**

   Mickey Mouse, the Marketing head, decided they will deploy a new product for this quarter called the Green Tea Popcorn. It takes roughly a month to prepare and launch a new product.

   After conducting the kick off meeting with the concerned departments such as procurement, management information system, and human resource, Mickey then logs into Kernel, the Project Management System. Upon logging in, he is greeted by his **Dashboard** which contains the measure of his overall timeliness and completeness when it comes to tasks related to projects as well as his department's overall performance. He can also find other information that needs his immediate attention such as tasks that are ending in the next two (2) days, tasks that are delayed, and documents needing his acknowledgement.

   However, before initiating the new product launch, he would first like to check up on the other projects he spearheads if he and the project team he has in mind is capable of keeping up with the pace. He proceeds to **Monitor Project** under the **Monitor** menu. In this page, he sees all the projects that he is tagged as the project owner and the breakdown of tasks for each involved department, their respective statistics, and the delayed tasks.

   1.1. **The project owner will then encode the project details into the system. This includes the main activities, sub activities, tasks, and their respective dependencies.**

      After Mickey decides that the project team can take the load, he then proceeds to the **My Projects** menu. Here, he can find are all the projects that he is involved in, whether he initiated the project or not. The status of each project is distinguished by color: teal for completed, green for ongoing, red for delayed, and yellow for planned. Above the list of projects are the "Create New Project" button and a list of templates which he may use as a model in creating the new project. He has the option to view the projects in either a list view or a grid view. In addition, he can also filter the projects according to his team.

      To begin the project creation process, he clicks "Create New Project". This process consists of five (5) steps, namely, (1) Input Project Details, (2) Add Main Activities, (3) Add Sub Activities, (4) Add Tasks, and (5) Identify Dependencies.

      He starts on the first step of inputting the project details as follows:

Project Title: ***NPL - Green Tea Popcorn***
Project Description: ***Marketing Campaign for Q4 2018***
Project Start Date: ***November 18, 2018***
Project End Date: ***December 21, 2018***

He proceeds to add two (2) main activities:

Main Activity Name:
Product Prototyping
Department/s:
Marketing
Start Date:
November 18, 2018
End Date:
December 2 , 2018

Main Activity Name:
Product Distribution
Department/s:
Procurement
HR
MIS
Start Date:
December 3, 2018
End Date:
December 21, 2018

He then adds two (2) sub activities for each main activity:

Main Activity Name:
Product Prototyping
Department/s:
Marketing
Start Date:
November 18, 2018
End Date:
December 2, 2018

Sub Activity Name:
Create Prototype
Department/s:

Sub Activity Name:
Conduct Testing
Department/s:

Marketing
Start Date:
November 18, 2018
End Date:
November 28, 2018

Marketing
Start Date:
November 29, 2018
End Date:
December 2, 2018

Main Activity Name:
Product Distribution
Department/s:
Procurement
HR
MIS
Start Date:
December 3, 2018
End Date:
December 21, 2018

Sub Activity Name:
Acquire Ingredients
Department/s:
Procurement
Start Date:
December 3, 2018
End Date:
December 10, 2018

Sub Activity Name:
Deliver Product
Department/s:
Procurement
HR
MIS
Start Date:
December 11, 2018
End Date:
December 21, 2018

He then adds the corresponding tasks under each sub activity:

Main Activity Name:
Product Prototyping
Department/s:
Marketing
Start Date:
November 18, 2018
End Date:
December 2, 2018

Sub Activity Name:
Create Prototype
Department/s:

Sub Activity Name:
Conduct Testing
Department/s:

Marketing
Start Date:
November 18, 2018
End Date:
November 28, 2018

Task Name:
Determine Ingredients
Department/s:
Marketing
Start Date:
November 18, 2018
End Date:
November 23, 2018

Task Name:
Create Sample
Department/s:
Marketing
Start Date:
November 24, 2018
End Date:
November 28, 2018

Main Activity Name:
Product Distribution
Department/s:
Procurement
HR
MIS
Start Date:
December 3, 2018
End Date:
December 21, 2018

Sub Activity Name:
Acquire Ingredients
Department/s:
Procurement
Start Date:
December 3, 2018
End Date:

Marketing
Start Date:
November 29, 2018
End Date:
December 2, 2018

Task Name:
Consumer Testing
Department/s:
Marketing
Start Date:
November 29, 2018
End Date:
December 2, 2018

Sub Activity Name:
Deliver Product
Department/s:
Procurement
HR
MIS
Start Date:

December 10, 2018

December 11, 2018

End Date:

December 21, 2018

Task Name:
Order Ingredients
Department/s:
Procurement
Start Date:
December 3, 2018
End Date:
December 5, 2018

Task Name:
Distribute Ingredients
Department/s:
Procurement
Start Date:
December 11, 2018
End Date:
December 13 , 2018

Task Name:
Inventory Ingredients
Department/s:
Procurement
Start Date:
December 5, 2018
End Date:
December 10, 2018

Task Name:
Conduct Training
Department/s:
HR
Start Date:
December 13, 2018
End Date:
December 17, 2018

Task Name:
Update PoS system
Department/s:
MIS
Start Date:
December 18, 2018
End Date:
December 21, 2018

After inputting the mains, subs, and tasks, Mickey then indicates which tasks are dependent on each other. Through this, Mickey marks certain tasks as pre-requisites to other tasks. This means that tasks that have pre-requisites cannot start if its pre-requisites task has not yet been marked complete.

1.2. Once project details and tasks have been encoded, the system will generate a gantt chart for the project.

After completing the fifth and final step in the project creation process, the system then generates a RACI-gantt chart for that corresponding project. In this RACI-gantt are the mains, subs, and tasks that were encoded by Mickey as well

as their responding RACI assignments. The gantt chart also displays the progress per task and its projected course throughout the project timeline. The progress bars per task are color coded depending on its status. Orange signifies the selected task, black is the parent task target timeline, dark blue as the task progress, red for delayed tasks, sky blue for the actual timeline, light blue for a child task target timeline and green for ongoing.

The buttons above the gantt chart provide the project owner and other user's additional actions towards a certain project. People involved in the project can view its documents and project logs which tracked every movement happening within the project.

1.3. All department heads assigned a task, then receives a notification to either delegate the task or assign it to themselves. This serves as the responsibility assignment matrix (RACI).

As Mickey taps a certain department to be responsible for a task, the respective department head will then have to log in to delegate the task. The procurement department was tapped to handle three (3) tasks for the new project. Donald Duck, the procurement head, logs into the system and receives a notification that notes that he was assigned to delegate the aforementioned tasks to his team. He proceeds to **Delegate** under the **Tasks** menu. In this page, Donald sees all the tasks wherein the procurement department were tagged as responsible for. He can do two (2) actions to a task. One is to delegate to his members or they can accept a task that was delegated to them. If they choose to delegate, they will assign a responsible, accountable, informed, and consulted for that task. They may only choose one responsible but several accountable, informed and consulted and they may come from a different department. If they choose to accept the task, it will immediately go into their **Todo** page under the **Tasks** menu. Given this, Donald decides to delegate three (3) of the tasks assigned to his department to Goo fy, one of his staff members.

1.4. Users that were assigned by their respective department heads then receive notifications for each task assigned to them.

Staff members will be notified through the system upon login regarding the tasks that their head or supervisors have tagged them as responsible. As mentioned above, Donald has tapped Goo fy to be responsible for three (3) tasks for the new project and tags himself as accountable. He then checks **Monitor Team** to check up on his team and their respective tasks.

Order Ingredients			
R	**A**	**C**	**I**
Goo fy	Donald Duck	Daisy Duck	Marketing Department

Inventory Ingredients			
R	**A**	**C**	**I**
Goo fy	Donald Duck	Oh Laugh	Oh Laugh, Marketing Department

Distribute Ingredients			
R	**A**	**C**	**I**
Goo fy	Donald Duck	Daisy Duck	Marketing Department

As Goo fy logs into the system, on his dashboard he sees the tasks that his superior has tagged him responsible for as well as the system notifications. Staff members can also view all their tasks on the **Todo** page on the **Tasks** menu. In this page staff members can do two (2) actions to a task, one is to mark it as done if all its prerequisites are marked done and second is to request for a change of date or performer. Upon proceeding to said page, Goo fy sees all tasks that he is responsible for and realizes that one (1) of the three (3) new tasks that Donald had delegated to him, specifically, *Order Ingredients*, was not supposed to be assigned to him as it is not part of his function. He then requests for a change of performer for *Order Ingredients* and puts "*not my function"* under reason for request.

1.5. Department heads receive notifications for the request for change for a certain task.

Requests for change are sent to the staff's department head for approval. Upon Goo fy's request, Donald sees on his **Dashboard** or on the **Change Request** menu that their is a request awaiting his approval. Donald then proceeds to the

change request and reviews the request details. Donald can decide whether to accept or reject Goo fy's request taking into consideration the task's post-requisites and if the request will cause delay or problems. Upon seeing that Order Ingredients has no post-requisites and that it was a valid reason, Donald decides to accept the request and he is immediately prompted redelegate the task to the right person. Donald tags his staff member, Minnie Mouse, as responsible for the task.

Order Ingredients			
R	**A**	**C**	**I**
Minnie Mouse	Donald Duck, Daisy Duck	Daisy Duck	Marketing Department

2. After the department head deals with their immediate concerns, they can now go about their daily routine. They now check what pending tasks they have to do.

Once Donald accomplishes his duties as a department head, he then tends to his daily routine. He proceeds to check **To Do** under the **Tasks** menu. He sees that he has no task due in two (2) days so he toggles the **All Tasks** button on the upper right of the screen to view all tasks assigned to him. He sees that *Purchase Menu Boards* of the *Store Opening - DLSU Andrew* project can now be done. He immediately does the task and once he is done, he marks it as complete.

2.1. Once a task that is a pre-requisite of other tasks has been marked done, the system notifies its post-requisites.

The system then notifies the task's post-requisite that the *Purchase Menu Boards* has been completed. *Upload Menu Art for Printing* is a post-requisite of the aforementioned task and marketing staff member, Winnie The Pooh, is responsible for this task. He is notified through the system and immediately proceeds to accomplishing his task. His task is to upload a document to the project *Store Opening - DLSU Andrew*. He proceeds to **My Projects** and to the *Store Opening - DLSU Andrew* box. Upon clicking, he sees the project gantt chart and clicks on the **My Project Documents** button and uploads the menu art and requests department head, Mickey's acknowledgment. After uploading, he goes back to his **Todo** menu and marks his task complete.

2.2. Users who are marked for acknowledgement for a certain document are notified through the system.

As there are certain documents that need acknowledgement from certain people within a project, users may request for this as proof that their intended receiver

had received the document. As Mickey was tagged for acknowledgement for Winnie's document, he gets notified through the system and it can also be seen on Mickey's **Dashboard**. He downloads the file and after viewing he acknowledges it. Mickey also notices on his **Dashboard** that one of his tasks, *Receive Digital Menu TVs* for project *Store Opening - DLSU Andrew* is already delayed. He makes the necessary communications between the supplier and is informed that it is already in transit and would arrive within the day. Once the delivery arrives, he marks the task as done on his **To Do** page, and as it is delayed, it requires a reason for its delay on the *Remarks* section. Mickey indicates that the *"supplier was delayed in delivering the product"*.

2.3. Once the last task of a project is marked as complete, the project will also be marked complete and the project end report can now be viewable.

As the last task of the project *Store Opening - DLSU Andrew* was marked as complete, the project is also marked as complete and the project owner, Mickey, is notified. The **Project Summary** report is now available for viewing which could be used during their close-out meeting. This report details the statistics of the project, its timeliness, all the involved department's timeliness, delayed tasks and the reasons for their delays. These can then be used for process improvement for their succeeding projects.

3. A completed project can be archived for documentation and for future reference for the organization. If an archived project has done well and users would want to use it again in the future, they may make the archived project into a template.

Being the project owner, Mickey had oversaw how well the *Store Opening - DLSU Andrew* project went and decided that this could be used again to maintain a certain standard of excellence. He makes the archived project as a template to be used in a similar project that could be done in the future.

3.1. A project that is exactly the same or almost alike with a templated project will be launched.

Mickey, the marketing head, was once again assigned to spearhead another store opening project titled *Store Opening - DLSU Bloemen*. Since they have already used *Store Opening - DLSU Andrew* as a benchmark for projects of that style, he decides to use the template he created a while back. Upon reviewing the **Project Summary** and seeing that the *Receive Digital Menu TVs* took longer than expected, he can adjust the days assigned to his new project to avoid concurring another delay.