PDI Project Workflow 2

timothy.propst[1], tim.propst[2]

[1]USDA-ARS; [2]OSU

timothy.propst

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ABSTRACT

This the new (Summer 2022) PDI workflow. Note that "project" and "sub-project" will now be referred to as "job" and "task," respectively. Also, in time there will be a new position created, the PDI Operations Manager (OM). Until that time the PDI Director of Operations (DO) will fulfill both the PDI Director of Operations and Operations Manager roles in the workflow outlined below.

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Protocol status: Working
We use this protocol and it's working

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Phase 1: Job conceptualization.

1 Customer reaches out to the PDI team.

2 All customer requests are forwarded to the Director of Operations (DO). This includes expansions, extensions, and revisions from previous PDI jobs as well as new jobs.

3 DO and OM work with Customer to develop an understanding of the tools/technologies required to meet Customer job needs, including discussion and agreement upon relevant data sharing protocols, privacy issues, etc.

> **Note**
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> We need to develop a standard statement, form, ???, that can at least make sure the data management issues are discussed and/or understood. Any future jobs that require official "agreements" can then be identified early in the process.

4 OM assumes day-to-day management role for the proposed job, but assigns a Coordinator to assist in working with the Customer, and if necessary, a Tech Team (TT) member(s), to conceptualize the proposed job and develop the job request. Job request includes job description as well as initial description of sub-jobs, referred to as “tasks” (tasks can include development of data ingestion tools, databases, data visualization tools, story maps, etc.).

5 Once the job request is completed, the OM submits the job request to the PDI Leadership Board (the Board) for review, using the following form (PDI Project Submission Tool).

Phase 2. Job request review.

6 All Board members receive an email with a link to review and vote whether to approve/disapprove the job request. This email will have a link to where the individual voting Board members review and approve/disapprove the job request.

7 If the job work request is disapproved, the Board will indicate disapproval as either one of two options:

7.1 “Outside the scope of PDI” – DO communicates back to the Customer that the project is out of scope and will not be undertaken.

7.2 “Further clarification required” -– This response will also be accompanied by specific recommendations from the Board, detailing revisions that should be made to bring the job request within the scope of PDI. OM returns the Board's decision and suggestions to the Customer, who is given the option to either consult further with the OM and Coordinator to rework and resubmit job work request or to end the request.

8 If job work request is approved, the OM and selected Coordinator meet with the Customer to further discuss the approved job. During this meeting, day-to-day management of the approved job is transferred from the OM to the Coordinator. This Coordinator will be assigned to all tasks generated from this approved job request.

Phase 3. Task scoping.

9 Post job request approval, the Coordinator and Customer review the overall scope of the job, breaking down the overall goals of the job into specific individual tasks. Task examples include development of data ingestion tools, databases, data visualization tools, story maps, dashboards, etc.

10 The Coordinator and Customer identify, prioritize, and finalize individual job tasks needed to complete the scope of the approved job. TT member(s) may be consulted to help define technical requirements associated with individual tasks.

> **Note**
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> If and when technical expertise is needed, the Coordinator will request such help from the OM. The OM will determine the TT member(s) with appropriate availability and/or skillsets needed to assist. (There may be multiple TT members working on different tasks within the overall job.) The OM will alert both the Coordinator and TT member(s) that they will be partnering together.

11 The Coordinator, Customer, and any associated TT member(s) will develop a preliminary Scope of Work (Project Guidelines?) that includes a list of all tasks needed to fulfill the scope of the approved job request. This document will outline the extent of each task effort, expected endpoints/deliverables, and anticipated timeline for completion, including stipulations regarding frequency and extent of any potential required maintenance/updates to task deliverables.

> **Note**
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> Need a template document/form to use. Background information, job partners, overall purpose and goals, etc. can be copied from the original job request form and included in the SOW as needed to validate tasks.

12 Once the SOW is agreed upon, the Coordinator will submit individual task request forms for each identified task to the DO for approval using the PDI task request review system:

(https://usdaars.maps.arcgis.com/apps/dashboards/c120759869e648fd82e347f6ed621b2c).

> **Note**
>
> Task requests are not submitted by the Coordinator until the Coordinator and TT member(s) associated with the task have availability to work on the task.

13 When the task work request is submitted into the task request review system, the DO will receive an email informing the DO that there is a task ready for review. The DO is expected to complete the review and approve/disapprove task requests within five business days.

13.1 If a task request is approved, the process moves to step 15.

13.2 If the task request is disapproved, the DO must provide a written explanation through the task request review system as to why the task request was disapproved. The DO also should indicate whether the task is completely beyond the PDI scope, or if it is recommended for resubmittal, provided suggested revisions are made. The Coordinator communicates task request results with Customer and works with the Customer and TT member (if necessary) to determine if/when the task request is revised and resubmitted at step 13.

14 The Coordinator reviews approved task requests with Customer in comparison with the SOW. Adjustments to the SOW may be required dependent upon approval or disapproval of individual tasks. The Coordinator and associated TT member(s) also discuss specific calendar milestones and deadlines so the Coordinator can inform Customer of expected start and end dates. Customer decides whether or not to proceed at that time.

> **Note**
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> It is expected that meetings for individual tasks are held on a weekly basis or more frequently. If the Customer cannot meet this often, then the Coordinator will inform the Customer that the task priority will be lowered and PDI will work on higher priority tasks. Once the Customer has more time available, the Coordinator will raise the priority level and will inform the Customer that the priority level has been raised and when the weekly cadence calls will resume. NOTE: there will likely be a delay from when the priority level is raised to when the regular cadence calls resume, as it will take some time for PDI team members time to have availability.

14.1 If customer defers to later date, future start date is scheduled with OM, Coordinator and TT member(s).

14.2 If customer accepts for immediate project start, move to step 16.

15 A finalized version of the SOW, complete with specific dates for expected milestones and delivery is developed and agreed upon by the Consumer, Coordinator, TT member(s), OM, and DO.

Phase 4. Task development.

16 The Coordinator schedules initial meeting with TT and Customer, and any other partners, to introduce personnel, discuss project roles, schedule cadence calls, and emphasize SOW.

17 TT develops tools/technologies per the task order and provides regular updates on progress, challenges, and possible delays to Coordinator.

> **Note**
>
> If new tasks are conceptualized, Coordinator discusses with OM and DO to determine whether a new job request form (Phase 2) or new task request form (Phase 3) is required.

18 Coordinator keeps OM and Customer informed of progress, issues, and schedule via meetings, emails, etc.

19 It is expected that the Coordinator holds TT members and Customers to established timelines. If timelines are not kept or there are clear delays, then the Coordinator discusses these issues with the OM. The OM, Coordinator, and TT member address the issues and develop a plan for getting the task back on track or dropping the priority rating of the task.

Phase 5. Task tool/technology beta testing.

20 TT and Coordinator provide tool/technology to Customer for beta testing.

21 Customer beta tests tool/technology and provides feedback to Coordinator and TT.

22 TT develops updated version of tool/technology and provides it to Customer for final evaluation.

23 TT finalizes tool/technology using feedback from Customer.

Phase 6. Task closeout.

24 Once the Customer acknowledges that the task is completed, the Scope of Work document is updated to reflect the change in status. All parties should be made to understand there will be no additional developmental work on this task.

> **Note**
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> Previously agreed upon maintenance or updates are not considered additional development.

25 Coordinator hands off all task deliverables to Customer and discusses any follow-on job requests.

> **Note**
>
> If new tasks are conceptualized, Coordinator discusses with OM and DO to determine whether a new job request form (Phase 2) or new task request form (Phase 3) is required.

26 Coordinator logs tasks as completed on Survey123 instrument and alerts OM of task completion.

27 The steps in this workflow phase are reiterated until all tasks for a specific job are finalized.

Phase 7. Job completion.

28 When all tasks associated with the job request are complete, the Coordinator:

28.1 Logs the job as complete,

28.2 Drafts an Accomplishment Statement,

> Note
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> Suggest we develop this as a Closeout Document that includes specific areas for impacts, testimonials, etc.; think sales/promotional brochure

28.3 Alerts OM and DO of job completion,

28.4 Sends initial customer satisfaction survey to Customer,

28.5 Archives tools developed for job and other pertinent information/resources for possible future use,

28.6 Schedules any tool maintenance/updates with Customer and TT member, as per SOW, if required

28.7 Ensures PDI overview story map that is used in initial meetings with Customer is updated with newly developed tools.

> **Note**
>
> Is this a reference to the Gallery?

29 DO informs PDI Director of Development and PDI Leadership Board of job completion. DO plans and implements public relations initiatives, if appropriate.

30 Coordinator sends follow-up Customer Satisfaction Survey out to Customer 3 to 4 months after job completion to review status of the PDI-developed technology.