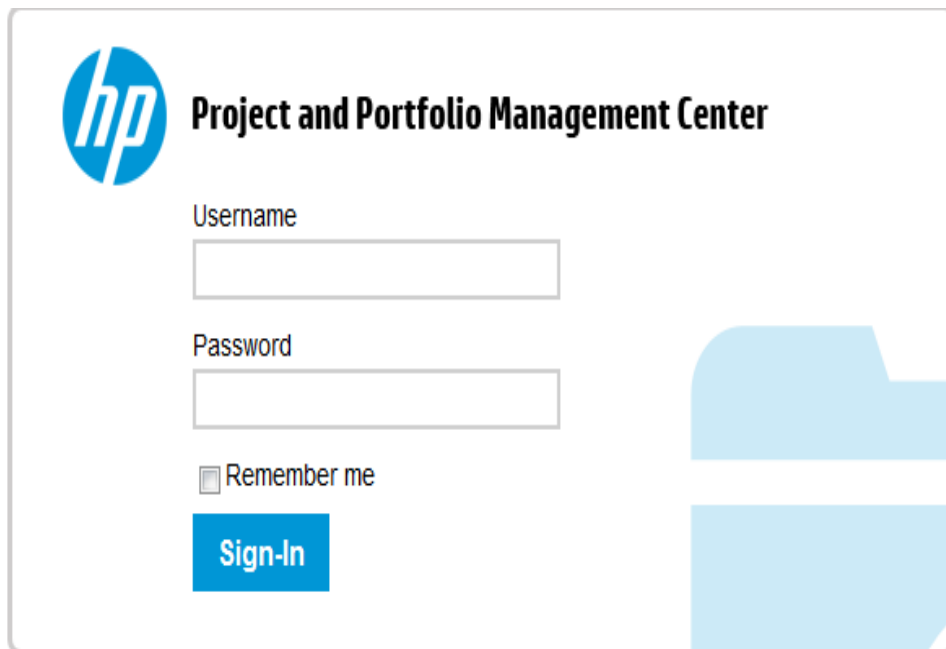



# Completing Proposal Process and Steps in HP Project and Portfolio Management Center



The image shows a login form for the HP Project and Portfolio Management Center. It features the HP logo, a title, and input fields for Username and Password. There is a 'Remember me' checkbox and a 'Sign-In' button. The form is overlaid on a large blue graphic of a folder and a pie chart.

 **Project and Portfolio Management Center**

Username

Password

☐ Remember me

**Sign-In**

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## 1. Process & Procedure for Completing Proposals

ThyssenKrupp Elevator has evolved in its industry as a front runner because of its commitment to innovation and by remaining ahead of power curve when it comes to technology. The company retains such a powerful influence by way of ThyssenKrupp employees, who actively create and submit new proposals for projects that foster ingenuity and growth for ThyssenKrupp Elevator.

ThyssenKrupp Elevator adheres to a strict process and procedural flow as proposals are developed, submitted, and officiated.

### The Process for Processing a Proposal

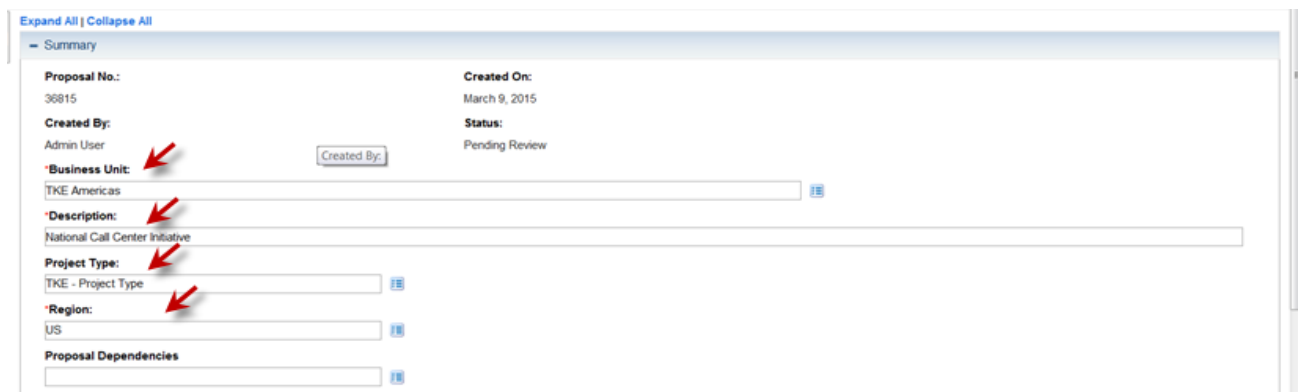
1. When an idea is formulated in the ThyssenKrupp Information Technology (IT) department, it must be expressed through written or verbal communication and will be submitted by a **Requestor** to the **PMO Coordinator**.
2. Upon review of the submission, the PMO Coordinator will create a formal proposal ticket through HP Project and Portfolio Management Center or HP PPM.
3. After the PMO Coordinator submits the proposal ticket, an initial review will be performed by the **Project Management Office (PMO)**.
4. The PMO will forward the proposal to the **Project Manager**, who will thoroughly evaluate the proposal.
5. After the Project Manager's evaluation, the **Governance Board** receives the proposal. The Governance Board consists of the Vice President of IT and the Vice President of Business. The board will either approve or reject the proposal.
  - A. If the Governance Board **accepts** the proposal, it is resubmitted to the PMO Coordinator, who will create a new project based on the request of the proposal.
  - B. If the Governance Board **rejects** the proposal, it is forwarded to the **Controller** to be closed.
6. When the project has been created and reaches its full cycle, it will be sent to the Controller to close the project.

## 2. Completing Proposals on HP Project and Portfolio Management Center (PPM)

### I. Summary

To begin completing the proposal, the Requestor is required to fill in the following boxes in the *Summary* section (See **Figure 1**) on the HP Project and Portfolio Management Center website.

- *Business Unit*
- *Description*
- *Project Type*
- *Region*



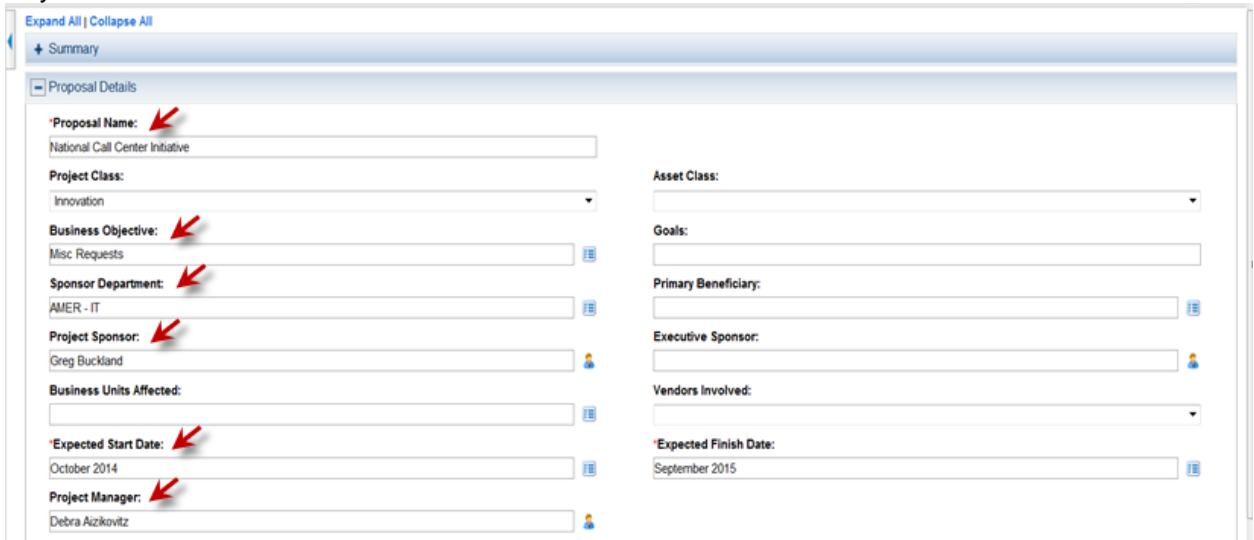
The screenshot shows the 'Summary' section of a proposal form. At the top, there are links for 'Expand All' and 'Collapse All'. Below this, the form is divided into two columns. The left column contains fields for 'Proposal No.' (36815), 'Created By' (Admin User), 'Business Unit' (TKE Americas), 'Description' (National Call Center Initiative), 'Project Type' (TKE - Project Type), 'Region' (US), and 'Proposal Dependencies'. The right column contains fields for 'Created On' (March 9, 2015) and 'Status' (Pending Review). Red arrows point to the 'Business Unit', 'Description', 'Project Type', and 'Region' fields.

**Figure 1:** Summary Screen

### II. Proposal Details

To begin completing the proposal, the Requestor is required to fill in the following boxes in the *Proposal Details* section (See **Figure 2**) on the HP Project and Portfolio Management Center website.

- *Proposal Name*
- *Business Objective*
- *Sponsor Department*
- *Project Sponsor*
- *Expected Start and Finish Date*
- *Project Manager*



Expand All | Collapse All

+ Summary

- Proposal Details

\*Proposal Name: National Call Center Initiative

Project Class: Innovation

Business Objective: Misc Requests

Sponsor Department: AMER - IT

Project Sponsor: Greg Buckland

Business Units Affected:

\*Expected Start Date: October 2014

Project Manager: Debra Azizkovitz

Asset Class:

Goals:

Primary Beneficiary:

Executive Sponsor:

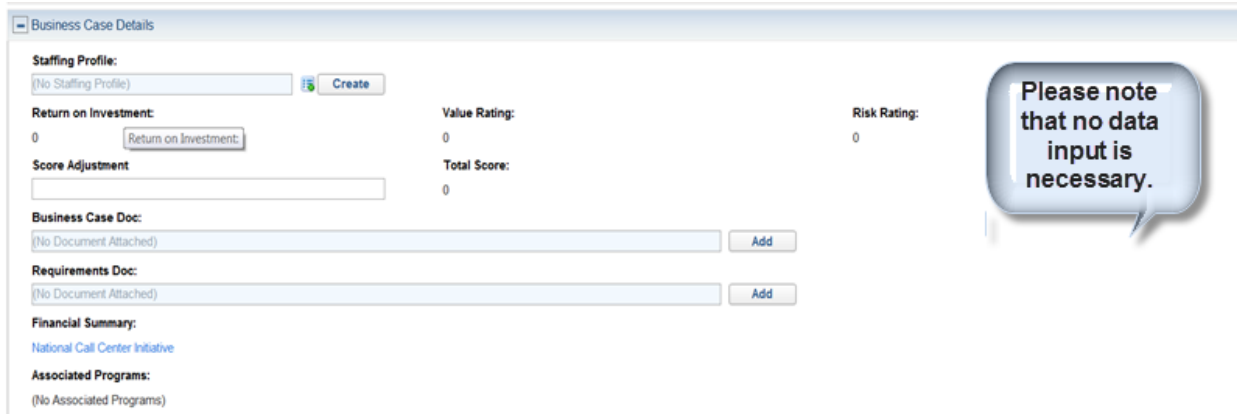
Vendors Involved:

\*Expected Finish Date: September 2015

Figure 2: Proposal Details Screen

### III. Business Case Details

There is no requirement that the Requestor complete the Business Case Details section (See Figure 3).



- Business Case Details

Staffing Profile: (No Staffing Profile) Create

Return on Investment: 0 Return on Investment: Value Rating: 0 Risk Rating: 0

Score Adjustment: Total Score: 0

Business Case Doc: (No Document Attached) Add

Requirements Doc: (No Document Attached) Add

Financial Summary: National Call Center Initiative

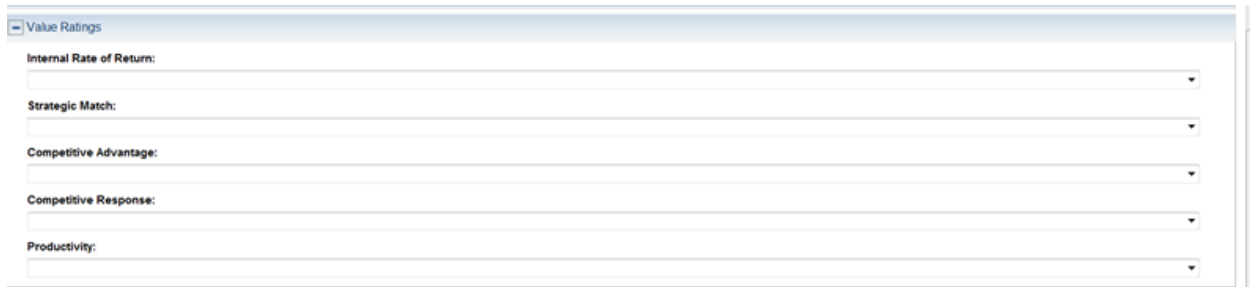
Associated Programs: (No Associated Programs)

Please note that no data input is necessary.

Figure 3: Business Case Details Screen

#### IV. Value Rating

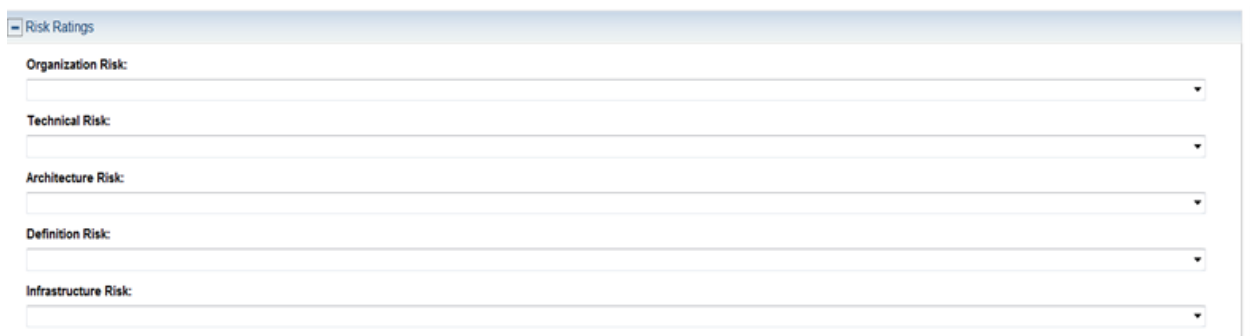
There is no requirement that the Requestor complete the Value Rating (See **Figure 4**) section.

The screenshot shows a web interface titled "Value Ratings". It contains five dropdown menus, each with a label and a downward arrow: "Internal Rate of Return:", "Strategic Match:", "Competitive Advantage:", "Competitive Response:", and "Productivity:". The dropdowns are currently empty.

**Figure 4:** Value Ratings Details Screen

#### V. Risk Rating

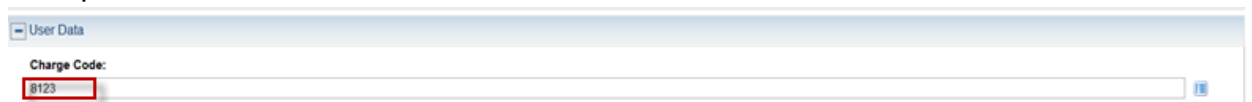
There is no requirement that the Requestor complete the Risk Rating section (See **Figure 5**).

The screenshot shows a web interface titled "Risk Ratings". It contains five dropdown menus, each with a label and a downward arrow: "Organization Risk:", "Technical Risk:", "Architecture Risk:", "Definition Risk:", and "Infrastructure Risk:". The dropdowns are currently empty.

**Figure 5:** Risk Ratings Details Screen

#### VI. User Data

1. The Requestor will enter the value **8123** in the *User Data* box (See **Figure 6**).
2. Collapse *User Data* section.

The screenshot shows a web interface titled "User Data". It contains a single text input field labeled "Charge Code:". The value "8123" is entered into the field. A red rectangle highlights the input field.

**Figure 6:** User Data Screen

## VII. Resources

1. The Requestor will enter name of the Project Manager under the required field *Resources* box (See **Figure 7**).

---

**NOTE:** If there will be additional parties that will require access to book timesheets, please enter their names under the *Resources* box.

---

2. Collapse *Resources* section.

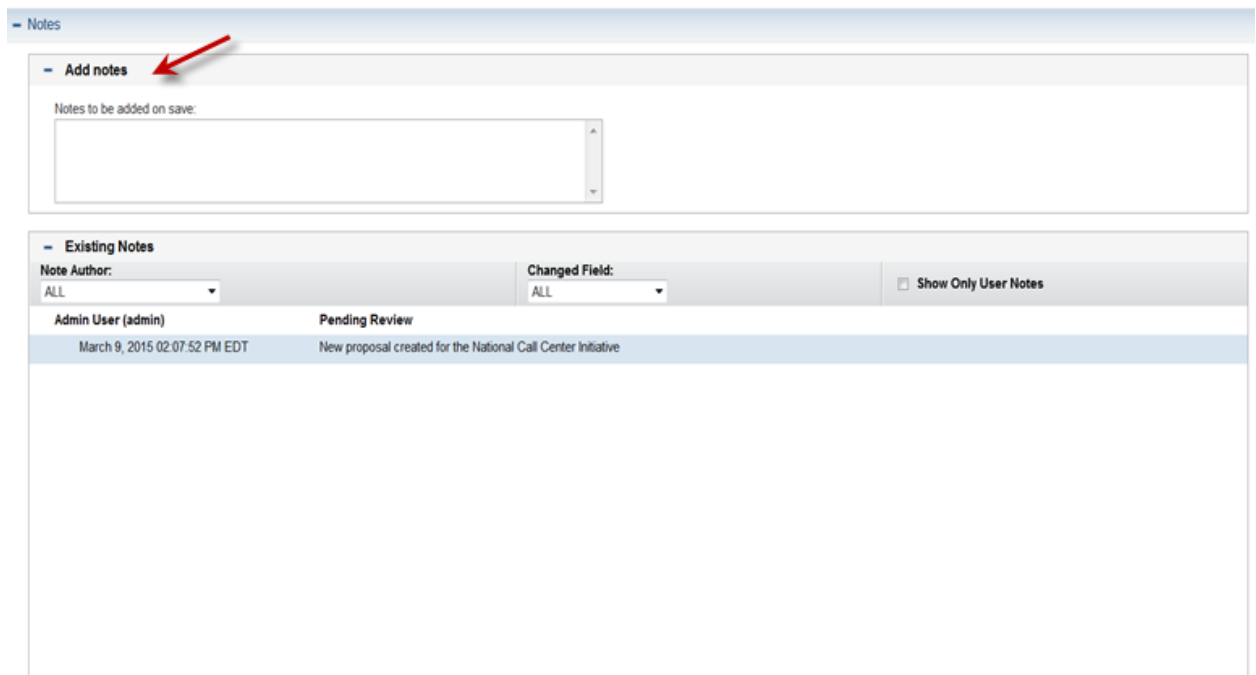


The screenshot shows a web interface with a 'Resources' section. A red arrow points to the 'Resource' field, which contains the name 'Debra Aizikovit'. Below this field is an 'Overall:' label.

**Figure 7: Resources Screen**

## VIII. Notes

1. Under the *Add Notes* column, the Requestor will enter “New proposal created for XXXX” (See **Figure 8**).
2. Collapse *Notes* section.



The screenshot shows a web interface with a 'Notes' section. A red arrow points to the 'Add notes' button. Below this button is a text area for adding notes. Further down is a table of existing notes.

Note Author:	Changed Field:	
ALL	ALL	<input type="checkbox"/> Show Only User Notes
Admin User (admin)	Pending Review	
March 9, 2015 02:07:52 PM EDT	New proposal created for the National Call Center Initiative	

**Figure 8: Notes Screen**

**Version:** 0.1

**Date:** 9 July 2015



## **IX. Conclusion**

After the Requestor has completed the steps above, the proposal will be complete. It will then be submitted for review by the PMO Coordinator.