# Purpose

This document describes the IT Project Request workflow, which is how the Business submits a project request for the Information Technology (IT) department and how it is reviewed, approved, and prioritized. Project requests may also be started via a helpdesk ticket reporting a non-production critical issue, if the estimated work hours to resolve the issue is 10 hours or more.

A project must have a beginning and end date, a defined goal, a return on investment (ROI), and requires 10 or more effort hours. A project may include multiple departments.

## Scope

The process begins with the Business submitting an IT project request or via a non-production critical help ticket in Fresh Service and ends when the project has been approved, prioritized by the Steering Committee and is ready for IT to begin the project work. Alternatively, the process ends when the project request is rejected and the ticket is closed.

The project ticket statuses are:

|  |  |
| --- | --- |
| **Ticket Status** | **Meaning** |
| Project – Awaiting Management Approval | Request has been received and a request for approval has been sent |
| Project – Awaiting IT Estimates | Request has been approved by management and is being reviewed by IT staff for estimated work hours |
| Project – Awaiting Steering Committee Approval | Request has been approved by management, has estimated work hours and will be reviewed by the Steering Committee |
| Project – Postponed per Steering Committee | Request has been reviewed by the Steering Committee and is currently on hold |
| Project – Business Research Required | Request has been reviewed by the Steering Committee and requires more information from the Business prior to approval |
| Project - Active | Project was approved by the Steering Committee, prioritized and is now being worked on by IT |
| Closed | Ticket was rejected at any point in the approval process, or the project was completed |

## Responsible

Project requester

Project requester’s department head

Executive Steering Committee (ESC)

Information Technology department

# Procedure

There are two ways a project request can begin:

[1. Project is initiated via an IT System Enhancement service request](#SystemEnhancement1)

[2. Project is initiated via a helpdesk ticket](#HelpdeskTicket2)

1. Project is initiated via an IT System Enhancement service request
   1. A department decides there is an IT enhancement they want to recommend as a project.
   2. The department’s project lead writes the [Business Requirement Document](http://nodsp2013/Company/Technology/Shared%20Documents/NOD%20Projects%20-%20Business%20Requirement%20Document.docx).
   3. The project lead goes to [FreshService](https://nationaloak.freshservice.com/support/home) and completes the **IT System Enhancement Request** form, including attaching the completed Business Requirement Document, and submits the request.

**NOTE:** Access to the request form is limited to members of the ESC, and the people who report directly to the VP of Operations and the VP of Sales & Marketing.

* 1. The person who completed the form is the project requester.
  2. The Director of IT is notified that the request has been created.
  3. The ticket state is automatically set to **Project – Awaiting Management Approval**.
  4. A request for approval is generated and sent out automatically.
     1. Project requests from Operations and Customer Service are sent to the VP of Operations for approval.
     2. Project requests from Sales and Marketing are sent to the VP of Sales & Marketing for approval.
     3. Project requests from Finance & Accounting, Supply Chain, eBusiness and Human Resources are sent to the CEO for approval.
  5. The approver responds to the request, following the steps in **WI-IT-054-A Responding to a FreshService Approval Request** to either reject or approve the request.
  6. If the request is rejected, the project requester is notified and the ticket is closed. No further action is taken.
  7. If the request is approved:
     1. The project requester is notified that the request is approved and will be reviewed by the Steering Committee.
     2. The Director of IT is notified.
     3. The ticket state changes to **Project – Awaiting IT Estimates**.
  8. The Director of IT assigns the applicable IT member as the ticket’s Agent.
  9. The assigned agent reviews the project request and updates the **Estimated total work hours** and **Estimated costs** fields.
  10. The agent changes the ticket status to **Project – Awaiting Steering Committee Approval**.
  11. At the next Steering Committee project review meeting, all tickets with the states **Project – Awaiting Steering Committee Approval** and **Project – Postponed by Steering Committee** are reviewed.
  12. If the project is rejected, the ticket is closed. No further action is taken.
  13. If the Steering Committee does not want work to begin on the project yet, the ticket state is changed to **Project – Postponed by Steering Committee**. It will be reviewed again at the next meeting.
  14. If the Steering Committee requires more information from the Business about the project:
      1. The ticket state is changed to **Project – Business Research Required**.
      2. The requestor is notified that more information is needed.
      3. The requester updates the ticket with more information.
      4. The Director of IT changes the ticket state to **Project – Awaiting Steering Committee Approval**.
      5. The updated project will be reviewed by the Steering Committee at their next meeting.
  15. If the project is approved, the Director of IT:
      1. Changes the project status to **Project – Active**.
      2. Updates the project’s priority.
  16. IT staff begins working on the project as prioritized. System Enhancement Service Request Approval Workflow

See the diagram on the next page for an overview of the System Enhancement workflow approval process.

## Diagram Description automatically generatedSystem Enhancement Service Request Approval Workflow

1. Project is initiated via a helpdesk ticket
   1. A user files a helpdesk ticket to report an issue.
   2. The assigned agent reviews the ticket and updates the **Estimated total work hours** and **Estimated costs** fields.
   3. If the issue is not production critical and will take 10 hours or more to resolve, the agent turns the ticket into a project request, following the steps in **WI-IT-055-A Converting A Ticket into a Project Service Request.**
   4. The project requester is the person who originally submitted the helpdesk ticket.
   5. The Director of IT is notified that the request has been created.
   6. The ticket state is automatically set to **Project – Awaiting Management Approval**.
   7. A request for approval is generated and sent automatically.
      1. Project requests from Operations and Customer Service are sent to the VP of Operations for approval.
      2. Project requests from Sales and Marketing are sent to the VP of Sales & Marketing for approval.
      3. Project requests from Finance & Accounting are sent to the Controller for approval.
         1. If approved, the request is sent to the CEO for approval.
      4. Project requests from Supply Chain are sent to the Director of Supply Chain for approval.
         1. If approved, the request is sent to the CEO for approval.
      5. Project requests from eBusiness are sent to the Director of eBusiness for approval.
         1. If approved, the request is sent to the CEO for approval.
      6. Project requests from Human Resources are sent to the Director of Human Resources for approval.
         1. If approved, the request is sent to the CEO for approval.
   8. The approver responds to the request, following the steps in **WI-IT-054-A Responding to a FreshService Approval Request** to either reject or approve the request.
   9. If the request is rejected, the project requester is notified and the ticket is closed. No further action is taken.
   10. If the request is approved:
       1. The project requester is notified that the request is approved and will be reviewed by the Steering Committee.
       2. The Director of IT is notified.
       3. The ticket state changes to **Project – Awaiting Steering Committee Approval**.
   11. At the next Steering Committee project review meeting, all tickets with the states **Project – Awaiting Steering Committee Approval** and **Project – Postponed by Steering Committee** are reviewed.
   12. If the project is rejected, the ticket is closed. No further action is taken.
   13. If the Steering Committee does not want work to begin on the project yet, the ticket state is changed to **Project – Postponed by Steering Committee**. It will be reviewed again at the next meeting.
   14. If the Steering Committee requires more information from the Business about the project:
       1. The ticket state is changed to **Project – Business Research Required**.
       2. The requestor is notified that more information is needed.
       3. The requester updates the ticket with more information.
       4. The Director of IT changes the ticket state to **Project – Awaiting Steering Committee Approval**.
       5. The updated project will be reviewed by the Steering Committee at their next meeting.
   15. If the project is approved, the Director of IT:
       1. Changes the project status to **Project – Active**.
       2. Updates the project’s priority.
   16. IT staff begins working on the project as prioritized. System Enhancement Service Request Approval Workflow

See the diagram on the next page for an overview of the Ticket Turned into a Project Request workflow approval process.

## Ticket Turned in Project Request Approval Workflow

Diagram

Description automatically generated

# Reference Material

## Related Documents

NOD Projects – Business Requirement Document Template

WI-IT-054-A Responding to a FreshService Approval Request

WI-IT-055-A Converting A Ticket into a Project Service Request

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Version** | **Date** | **Description of changes** | **Author** | **Approver** | **Status** |
| A | 02/23/2021 | Initial SOP Release | Sarah Steinhoff | Geoff Peckham | FR Approved |
| Select |  |  |  |  | Select |
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