



Creating a Project Proposal


You can enter project proposals online, where they can be reviewed and approved. Approved proposals will be moved directly into the Project Slate, without any extra effort on your part.



Starting a Proposal

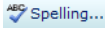
While it is not necessary to complete all the fields before submitting the proposal, the more information you can supply, the more likely it will be that the project will be correctly resourced and scheduled. You cannot save the proposal without entering values in those few fields marked with a red asterisk. Additional fields are required to submit the proposal; those fields include **Required** in their description.

1. Click on the link [Begin work on a new proposal](#), in the center of the page to open the proposal form.
2. The Fiscal Year defaults to the year for which proposals have been requested.
3. Identify the project:
 - a) In the *Project Name* field, enter a name that will identify the proposed project.
 - b) In the *Project Description* field, enter an overview of the project. Be concise, but provide enough information to identify the project's purpose and objectives.
4. Identify the project ownership and governance:
 - a) In the *Submitter* field, type your netID and press the Enter key.
 - b) In the *Owner Department* field, click the drop-down arrow  and select your department from the list by double-clicking on it.
 - c) In the *Executive Sponsor* field, click the **Address Book**  button to display the Select People window. Then select the executive who is ultimately responsible for this project by double clicking on the person's name.

Tip! The executive sponsor is the senior University administrator responsible for the business process the project will impact.

- d) In the *Sponsor* field, type the netID of the sponsor, or click the **Address Book**  button, and then enter the person's last name. Select the person from the search results by double-clicking on the name.

Tip! The sponsor is the executive who will be directly responsible for the project, usually your director, manager, chair, or office head.
 - e) In the *Project Manager/Customer* field, type the netID of the person who will have day-to-day responsibility for implementing the project, or use the **Address Book**  to select the person.
 - f) In the *OIT Lead* field, enter the netID of the person to be contacted in OIT, usually, but not always the Technical Project Manager, or use the **Address Book**  to select the person.
5. Explain why the project is needed:
 - a) In the *Value to Department* field, describe why the project is important to your department(s).
 - b) In the *Value to University* field, describe why the project is important to the University.
 - c) In the *Alternatives* field, describe any alternative actions, including that of doing/changing nothing. Explain what each alternative is, and what the result would be for each.
 6. Describe the scope of the project:
 - a) In the *Processes Impacted* field, describe which functions and processes will be included in the project.

- b) Identify who will be impacted by the project by clicking each checkbox that applies in the *Constituencies Impacted* field.
 - c) In the *External Resources* field, indicate the need for external resources for the project.
7. Indicate when you would like the project to begin and go live:
 - a) In the *Desired Start Date* field, enter the best time to begin the project.
 - b) In the *Desired Go Live Date* field, enter the date when the window of opportunity will close, or the best time to implement the project.
 8. Provide any additional comments in the *Proposal Comments* field.
 9. To check the spelling in all the fields on the form, scroll to the top of the form and click the **Spelling...**  button.
 10. To submit the proposal for OIT review, click **Submit** in the *Draft or Submit* field, and then click the **OK** button.


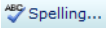
If you are not ready to submit the proposal, click **Draft**, and then click the **OK** button.



Changing a Proposal

Editing a Proposal

If you have saved a proposal, you can see it on the Proposals in Progress list on the top right of the IPP Home page. To edit the proposal:


1. Click on the name of the proposal in the Proposals in Progress list to display the proposal.
2. You can review the displayed proposal, but to make any changes to it, or to submit it, you must click the **Edit Item**  button in the toolbar at the top of the proposal.
3. The proposal form is opened for editing. Make any changes or additions to the proposal.
4. To check the spelling in all the fields on the form, scroll to the top of the form and click the **Spelling...**  button.
5. If you are ready to submit the proposal, click on **Submit** in the *Draft or Submit* field at the bottom of the form, then click **OK**.

Tip! If you submit the proposal and the list of My Proposals in Draft is not displayed, check to make sure all person look-ups have been validated correctly.

If you are not yet ready to submit the proposal, leave **Draft** selected and click **OK**.

Submitting a Saved Proposal

If you saved a proposal and are now ready to submit it, you must click the Edit button in order to open the form and submit it.


1. Click on the name of the proposal in the Proposals in Progress list to display the proposal.
2. To submit the proposal, click the **Edit Item**  button in the toolbar at the top of the proposal.


3. When the proposal is opened for editing, scroll down, and click on **Submit** in the *Draft or Submit* field at the bottom of the form, then click **OK**.

Deleting a Proposal

You can delete a draft proposal (one that has not yet been submitted) from the review page or the form itself.

To delete a proposal from the review page:

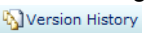
1. Click on the name of the proposal in the Proposals in Progress list to display the proposal.
2. Make sure this is the proposal you want to delete.
3. Click the **Delete Item**  button in the toolbar at the top of the review form.
4. When prompted to confirm the deletion, click **OK** to delete the proposal, or **Cancel** to keep it.

If you are already in the Edit form for a proposal, simply click the **Delete Item**  button in the toolbar at the top of the form, and confirm by clicking **OK** when prompted.

Note: If you want to delete or retract a submitted proposal, contact Barrie Sutton (8-2714 or barries@princeton.edu) to remove a submitted proposal.

Reverting to a Previous Version

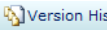
Each time you save a draft proposal, a new version is created. If you made changes that no longer apply, you can revert to a previous version.

1. Select the proposal in the Proposals in Progress list and Click the **Version History**  button in the toolbar at the top of the proposal.

2. Position the mouse over the version date, and then click the down arrow to the right.
3. Select the **Restore** option to revert to this version.

To See What's Changed

If you are alerted that a proposal has been changed, the email will list the changes. You can also check the versions to see what has changed.

1. Click on the name of the proposal in the Proposals in OIT Review list.
2. When the review form is displayed, click the **Version History**  button at the top of the form.
3. The versions are listed starting with the most recent changes at the top. For each version, the modification date and the name of the person who modified the proposal is displayed first, followed by a list of which fields were changed, and the updated value in each changed field.
4. To return to the current version of the proposal, click the proposal name in the breadcrumbs in the gold banner at the top of the page.



Updating & Tracking a Proposal in OIT Review

When you submit your proposal, it moves into the OIT Review stage. You can now find the proposal in the Proposals in OIT Review list on the right side of the page.

OIT reviews the proposal to determine effort required and scheduling possibilities. Other functional areas may also review and update the proposal.

What Can Be Changed in OIT Review?

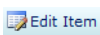
In addition to the fields available when you created the proposal, the following new fields are available to OIT and Project Manager/Customers during OIT review:

- ⇒ OIT Department - identifies the OIT Department primarily responsible for the project.
- ⇒ OIT Unit - identifies the group within OIT assigned to the project.
- ⇒ Systems Impacted - identifies the applications, systems, or services being modified, enhanced, or implemented.
- ⇒ OIT Resources Needed - identifies each OIT group that may contribute effort to completing the project.
- ⇒ OIT Effort - Describes the amount and duration of effort expected from each group in OIT that will be involved in the project. This is only an estimate.
- ⇒ Offices/Departments Required - identifies each Office or Department that may contribute effort to completing the project.
- ⇒ Owner Department Effort - Describes the effort expected from the owner department. This is only an estimate.
- ⇒ Project Funding - identifies the funding option that best fits this project. Supplemental funding can be requested through SAGIT (Senior Advisory Group on IT).

- ⇒ Project Funding/Resource Explanation - describes the resources and funding required to accomplish the objectives.
- ⇒ Target Start Date - the date agreed to by the Project Manager/Customer and OIT Lead as the best estimated start date. The date is subject to change when formal project planning begins.
- ⇒ Target "Go Live" Date - the date agreed to by the Project Manager/Customer and OIT Lead as the best estimated go-live date. The date is subject to change when formal project planning begins.
- ⇒ Date Constraints - provides further information about the target dates, including why a date has been left blank.
- ⇒ Status - the value is **In Review** until one of the following recommendations is made:

Accepted	The project will go on the slate for the fiscal year.
Not Accepted	The project cannot be scheduled in this fiscal year.
Deferred	The project is deferred for another year.
Referred to DAS Queue	The proposal has been referred to Departmental Application Services for consideration.
Referred to OnBase Queue	The proposal has been referred to the OnBase group for consideration.

To update the proposal during OIT Review:


1. Click on the name of the proposal in the Proposals in OIT Review list.
2. When the review form is displayed, click the **Edit Item**  button at the top of the form.

3. Review the proposal, adding or changing information as needed. Generally, you should not change information entered by another group. If you find something you disagree with, contact the person who made the change to discuss it with them. *Tip! You can find the person who made the change by reviewing the version history.*
4. When you have completed your additions or updates, click the **OK** button.
5. When the proposal is endorsed by the ESPG (Enterprise Systems Planning Group), it is moved from your Proposals in OIT Review list to Project Slate in the center of the Welcome page.

Tracking a Proposal

To see if a proposal has been updated, you can set an alert on the proposal.

To set an alert on a proposal:

1. Click on the name of the proposal in the Proposals in OIT Review list.
2. When the review form is displayed, click the **Alert Me**  button at the top of the form.
3. On the New Alert page, enter the *Alert Title*. This will be used as the subject line of the email message sent for the alert.
4. The *Send Alerts To* field defaults to your current email address.
5. In the *Send Alerts for These Changes* field, select when you want to be alerted.
6. In the *When to Send Alerts* field, select the frequency with which you want to be alerted to changes.
7. Click **OK**. You will receive an email notification confirming that you have created an alert.



Introduction to the IT Interdepartmental Project Portfolio

The Interdepartmental Project Portfolio (IPP) is Princeton's electronic portal for viewing proposed and endorsed IT projects.

What's the Annual Planning Process?

Each year, new projects are proposed, and evaluated based on need, cost, benefit, visibility/impact, and risk. Accepted projects are then scheduled based on effort and availability of resources, both technical and functional. The process includes these steps:

1. The planning process begins with an email from the CIO requesting proposals for IT projects.
2. The email includes a link to the IPP, where you create proposals for all the projects you would like to begin during the next fiscal year.
Until you submit the proposal, it remains in the Proposals in Progress list, where you and anyone named in the proposal can review it. If you want someone who is not specified to review the proposal, copy the URL for this page and paste it into an email to that person.
3. When you have provided as much information as you can, submit the proposal for OIT review.
4. During OIT review, the OIT Lead and the Project Manager/Customer review the proposal to add any needed information.
5. When the OIT review is complete, the OIT Lead changes the *Status* to accept, defer, refer to another work queue, or not accept the proposal.
6. The list of accepted projects is reviewed by the Project Management Team (PMT) and endorsed by the Enterprise Systems Planning Group (ESPG) for final approval by the Provost. Approved projects become part of the Princeton IT

What You See When You Log In

To begin a new proposal, click here

Alternate views are listed here, or you can create your own.

To sign out, click here and select Sign out

Your list of proposal drafts that have not yet been submitted

Proposals under review for which you are a manager, sponsor, or resource

Your approved projects will be listed here

Links for documentation, additional information, and help

Project Slate and can be viewed and tracked on the IPP.

Accessing the Project Portfolio

1. In your browser window, enter the web address <http://www.princeton.edu/IPP>.
2. On the Welcome page, you will see a list of all your accepted projects in the center of the page, and your proposed projects in either of two lists on the right—your proposals in progress, and your proposals in OIT Review.
3. Click the name to open a project or proposal.

