



STATE OF ALABAMA

OFFICE OF INFORMATION TECHNOLOGY



Procedure 410P2: Completing a Project Request Form

VERSION NUMBER	Procedure 410P2-02
VERSION DATE	October 1, 2017
PROCEDURE TITLE	Completing a Project Request Form
GOVERNING POLICY	This procedure is governed by the current Policy 410: IT Project Initiation, regardless of revision.
TERMS AND DEFINITIONS	<p>Office of Information Technology (OIT) – formed through the passage of Senate Bill 117, to focus on three statutory mandates: IT Strategic Planning, IT Governance, and IT Resource Utilization.</p> <p>Project Request Form – provides basic information and description about the project</p> <p>Project Initiation Packet – This packet consists of three documents: the Project Request Form, the Project Business Case, and the Project Charter. This packet is to be submitted to OIT for project governance.</p>
OBJECTIVE	The objective of this procedure is to provide guidance on how to complete and submit the Project Request Form to OIT. The Project Request Form is part of the Project Initiation Packet.
PURPOSE	This procedure's purpose is to provide instructions for completing the Project Request Form.

**SUPPORTING
DOCUMENTS**

The following documents support this Procedure:

- Policy 410: IT Project Initiation
- Procedure 410P1: IT Project Initiation Phase
- Template 410T1: Project Initiation Tool

EFFECTIVE DATE

This Procedure shall be effective upon its approval by the Secretary of Information Technology, as evidenced by the signature of the Secretary being affixed hereto.

SUPERSEDES

This Procedure supersedes version 400P2-01.

PROCEDURE

Completing a Project Request Form

1 Introduction

1.1 Inputs

- The Project Request Form is part of the Project Initiation Packet.
- The Business Case and Project Charter must be submitted along with the Project Request Form to OIT. The Project Initiation Tool should be used to complete the Project Request.
- The Project Initiation Tool, Template 410T1, can be downloaded from OIT's website.

1.2 Entry Criteria

The Project Request Form must be approved by the Department's director/commissioner prior to being submitted to the OIT.

1.3 Procedural Steps

1. Open the Project Initiation Tool using Template 410T1.
 2. Select the 'Project Information' link that is located under the Navigation menu.
 3. Complete all the fields on the Project Information screen with the exception of those fields requiring actual date and cost information. Actual cost and date information will not be available until the conclusion of the project.
- Project Name – this should be a short name that describes the project. This name must be consistent across all submitted documents within the Project Initiation Packet for identification purposes.

- Project Type – the type of project, whether IT Project or Services Project
 - Project Sub-Type – the sub-type of the project, whether Infrastructure, SaaS, Service, or Software Development
 - Business Area – whether IT Initiative or Functional Area
 - Business Level – whether Tactical, Strategic, or Operational
 - Purpose – the reason for undertaking the project
 - Complexity – how complex the project will be for your agency
 - Discretionary Option – whether the project is mandatory or discretionary
 - Funding – describes if funding is available for the project
 - Phase – the current phase of the project
 - Expense Category – describes the type of funding for the project
 - Date of Project Request – date request is approved by department or agency
 - Estimated Project Start date – date anticipated to start the project
 - Estimated Project Completion date – date anticipated to finish the project
 - Estimated Total Work (hours) – the total amount of work to be performed in hours for this project regardless of role
 - Actual Start State – the actual project start date
 - Actual Completion Date – the date all project work is actually completed
 - Due Date – the mandated project finish date
 - Actual Cost – the actual monies expended on the project to date
 - Size of Project as Determined by Sizing Tool – Project Size (Minor, Moderate, or Major)
 - Implementation Date of the System/Solution – The date the system is placed in production. The project may not be completed prior to the implementation date.
 - Life of the System/Solution in Years - number of years anticipated for the project to be utilized by the agency (maximum 15 years)
 - Project Requestor name, phone number, email address, and agency
 - Project Manager name, phone number, email address, and agency
 - Project Sponsor name, phone number, email address, and agency
 - Project Owner name, phone number, email address, and agency
 - Product Owner name, phone number, email address, and agency
 - Agency Initiating Project – this is the agency responsible for initiating the project. There may be other agencies involved.
 - Initiating Agency Acronym – Acronym for the Agency initiating the project.
 - Have all parties approved the plan? – a true/false answer to confirm approval of all parties
 - Provide a Description of the Issue/Problem– general description of project (limited to 2000 characters)
 - Explain the Recommendation (Project Scope) – describe how the project will address the issue/problem and how desirable results will be achieved. This will become your “Project Scope Statement” in the Project Charter document.
4. Once all fields have been completed on the project information screen, return to the dashboard in order to save the information to the template.
 5. To view the Project Request form, select the ‘Project Request’ link that is located under the Reports Menu.

2 Verification/Supporting Data

2.1 **Outputs**

- The completed Project Request should be submitted to OIT as part of the Project Initiation Packet.
- The EPMS Info Sheet, located under the Reports Menu in the Project Initiation Tool, is available to view once the information on the 'Project Information' link has been completed. The EPMS Info Sheet maps the information entered in the Project Initiation Tool to the correct fields for input into OIT's automated project portfolio management solution.

2.2 **Responsibility/Authority**

OIT has approved this procedure and has the authority to ensure compliance with this procedure.

2.3 **Deviation/Tailoring**

There should not be any deviations or tailoring permitted to this procedure. If deviations or tailoring are required, a request must be submitted to OIT.

The undersigned, as Acting Secretary of Information Technology of the State of Alabama, exercising the power vested in that Office by the laws of this State, declares this Procedure to be

available for adoption as of the 1st day of October, 20 17



Jim Purcell
Acting Secretary of Information Technology

DOCUMENT CHANGE HISTORY

Version	Release Date	Comments
410P2-01	April 12, 2016	Initial version
410P2-02	October 1, 2017	Updated version to incorporate changes to project sizing, Project Charter, procedural steps in the Project Initiation Tool, and use of an automated project portfolio management solution