Why does the ITCRB need the Intent to Submit?

• The ITCRB uses the Intent to Submit to get an overview of what proposals will be reviewed for the coming fiscal year. Using this overview, we can:
  – Estimate whether the funding demands outstrip available funds.
  – Gauge the timeline for incoming proposals.
  – Identify projects with common goals and connect them ahead of proposal deadlines.

• How does it help you?
  – You will be able to see the other proposals up for review and judge the relative priority of your project prior to the submission process, allowing you to decide whether further work is needed.
  – You will have a sense of available funds and demands for the upcoming fiscal year.
  – You will be able to see projects that may have an impact on your functional area.

• When your project is approved, this Intent to Submit will change to a Project in ServiceNow.
  – This ServiceNow record will be where you keep all information about your project going forward.
  – The original Intent to Submit remains as a record of the project’s original scope and vision.
How the process works

Submitting a Proposal

1. **Does a Demand exist in ServiceNow?**
   - **NO**
2. **Create a Demand (slide 3)**
3. **Provide required details (slide 4)**
4. **Submit Demand via ServiceNow**

After Submission

1. PMO synthesizes information
2. Intent to Submit list made available
3. Functional Areas judge priorities
4. Final proposal list begins ITCRB process
Creating an ITCRB Intent to Submit

- If a Demand already exists, make sure the information is current and complete.
  - Complete steps 4 through 7 below, if this has not already been done.
  - If you are unsure whether a Demand already exists for your project, please contact Ellen Landsman.

- If the Demand does not already exist, create one in ServiceNow.
  (see How to Create a Project)
  1. Fill in all required fields on the top section of the form.
     Note: While School is not required for all projects, it must be completed for all ITCRB projects.
  2. Fill in all required fields on the Assessment Data tab.
     Note: Fields on the ITCRB/FAS PRB tab are used only after approval. You may ignore this tab at the Intent to Submit stage.
  3. Click on Save to move the Demand through the workflow.

- Move through the workflow to Qualified.
  4. Click on Submit Demand.
  5. Click on Screen.
  6. Click on Qualify.
  7. STOP once the workflow reaches Qualified.
Adding required details to the Intent to Submit

You will need to provide several required details for the Intent to Submit to be considered.

- **Project Phases tab:**
  - A record is required for each anticipated project phase. If a record for a phase already exists, make sure the dates are correct. Click on “New” to add a record for any missing phase.
  - When entering Start and End date, you will only need to indicate months of work. Therefore, the Start Date should always be the first date of the month in which work begins, and the End Date should always be the last day of the month — even if those are not working days.
  - Start and End dates of phases should not overlap. For example, if Plan ends in April, Implement should start in May (unless there is a gap between Plan and Implement).

- **FY Cost Breakdown tab:**
  - A record is required for each year the project will be funded. If a record already exists, make sure the information is correct.
  - Click on “New” to add a record for any missing phase.
  - Multiple types of cost can be stored on the same record. For example, if Operating Tail Costs are expected to start in the same year as Capital Costs, that information should be on the same record.
  - Any previous awards should be indicated by filling in the award amount for the award type for the year the award was made.
  - The PMO will fill in the Actual Total Cost fields.

To flag the project for the current Intent to Submit cycle:

1. Go to the Demand List view.
2. Click on the gear to personalize your list view.
3. Add the following fields: Funding Cycle and ITCRB Type.
4. Find your Demand in the list, double-click below Funding Cycle and type in FY19.
5. Double-click on ITCRB Type and select the funding type. Click on the green checkmark next to it.
Tips

• For ITCRB projects, the Sponsor must be a VP, Vice Provost, or UCIO.

• The Project Governance URL field will be completed by the PMO. We will add the hyperlink to the project documents folder into which you will post required proposal files and other required documents (e.g. budget, review summaries, etc.). This folder will be used throughout the life of the project.

• For the ITCRB Type field the following choices are available:
  – Plan
  – Plan & Implementation
  – Implementation

The choice you make here depends on the funds you will be requesting. Remember however, that even if you are only requesting funds for Plan, you must include preliminary Implementation details (including cost breakdown) in your proposal.