InTechProject

A4.2.1 Perform pre-project survey

Process Description

Version: 1.0.1

Status: Working

APPROVED

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Title

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Name and Signature

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Date

List of Changes

| No. | Version | Status | Date of Change | Description |
| --- | --- | --- | --- | --- |
|  | 1.0.1 | Working | 10/17/2020 |  |

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Definitions

|  |  |  |
| --- | --- | --- |
| *{Border}* | – | External producer or receiver of an arrow. Name is not specified in case of unambiguous understanding by diagram readers or in case of ambiguity. |
| *{Tunnel}* | – | Producer or receiver of an arrow. Name is not specified in case of unambiguous understanding by diagram readers. |
| *Organizational Management Structure* | – | Set of specialized functional units interconnected in the process of substantiation, development, adoption and implementation of managerial decisions (hereinafter referred to as the Organizational Structure). |
| *Process (Business Process)* | – | A series of tasks with a clearly defined start and end time, aimed at achieving a particular outcome valuable for an organization. |
| *Process Actors* | – | Resources (technological, work) used for performing a process. |
| *Process Inputs* | – | Resources (material, information) needed to perform a process and transformed by a process into outcomes. |
| *Process Outputs* | – | Resources (material, information) produced by a process. These are used to perform other processes or consumed by external customers. |
| *Process Owner* | – | A person who is accountable for the process result and has the authority to add or remove resources that affect the process performance. |
| *Sub-Process* | – | A process that is a part of the upper process. |

# General

The description of the “A4.2.1 Perform pre-project survey” process that is a part of the “A4.2 Implement project” process is developed to:

* Unify rules and requirements to process performance;
* Set responsibility for process results;
* Standardize document flow.

## Objectives

Performance of the “A4.2.1 Perform pre-project survey” process is aimed at achievement of the following objectives:

|  |
| --- |
| * Plan projects accurately |

## Process Owner

The process is owned by:

* Project Manager

## Process Actors

The process is performed by the following org units:

* Leading Engineer

## Start Boundary

Starting boundary is defined by the following events:

Project task received

## End Boundary

Pre-project survey documentation drawn up and approved.

## Process Inputs

| No. | Input | Objects | Comes From | |
| --- | --- | --- | --- | --- |
| Actor | Activity/External Environment |
| 1. | Preliminary design | Preliminary design | Design Engineer | A4.1.3 Create preliminary design |

## Process Outputs

| No. | Output | Objects | Goes To | |
| --- | --- | --- | --- | --- |
| Receiver | Activity/External Environment |
| 1. | Pre-project survey documentation | Certificate of completion  Pre-project survey report | Project Manager | A4.3.3 Close project |
| 2. | Pre-project survey report | Pre-project survey report | Leading Engineer | A4.2.2 Draw up and analyze Technical Design |
| Project Manager |
| 3. | Primary financial reporting - perform pre-project survey | Certificate of completion  Pre-project survey report | Budget and Finance Department | A7.6 Prepare reporting |

## Documentation

Performance of the “A4.2.1 Perform pre-project survey” process is regulated by the following reference documents and requirements:

|  |
| --- |
| * Project requirements specification |
| * Project tasks |

# Process Diagram

|  |
| --- |
| title |

# Process Flow

### A4.2.1.1 Perform pre-project survey

##### Actors

Performed by org units:

* Leading Engineer

**Start Boundary**

Project task received

**Duration Requirements**

Within three working days.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Preliminary design | Design Engineer |
| 2. | Project requirements specification | Leading Engineer |
| Project Manager |
| 3. | Project tasks | Project Manager |

##### Instructions

Process actor carries out a pre-project survey using a project requirements specification and project tasks.

### A4.2.1.2 Draw up pre-project survey report

##### Actors

Performed by org units:

* Leading Engineer

**Duration Requirements**

Within one working day after a pre-project survey is over.

##### Instructions

On the basis of information established during a pre-project survey, process actor draws up a report and submits it for approval.

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Pre-project survey report | Project Manager |

### A4.2.1.3 Approve pre-project survey report

##### Actors

Performed by org units:

* Project Manager

##### Other Participants

The following org units participate in the process performance:

* accepts:

* + Customer

**Duration Requirements**

Within one working day.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Pre-project survey report | Leading Engineer |

##### Instructions

After receiving a pre-project survey report, process actor studies it and - there not being any comments - approves it. A report that has been approved by Project manager is submitted to a customer for approval. A report with comments is sent for correction.

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Pre-project survey report | Project Manager |

And:

| No. | Provided That | Objects | To |
| --- | --- | --- | --- |
| 1. | *Report approved* | Pre-project survey report | Accountant |

In case none of the conditions are met, actors deliver:

| No. | Objects | To |
| --- | --- | --- |
| 1. | Pre-project survey report | Leading Engineer |

### A4.2.1.4 Draw up certificate of completion

##### Actors

Performed by org units:

* Accountant (Budget and Finance Department)

**Duration Requirements**

Within one working day.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Pre-project survey report | Project Manager |

##### Instructions

Process actor draws up a certificate of completion in two copies.

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Certificate of completion | Project Manager |

### A4.2.1.5 Modify pre-project survey report

##### Actors

Performed by org units:

* Leading Engineer

**Duration Requirements**

Within one working day.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Pre-project survey report | Project Manager |

##### Instructions

If there are comments on a pre-project survey report, process actor corrects it.

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Pre-project survey report | Project Manager |

### A4.2.1.6 Submit documentation to customer for signature

##### Actors

Performed by org units:

* Project Manager

**Duration Requirements**

Within one working day.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Certificate of completion | Accountant |

##### Instructions

Process actor submits originals of a certificate of completion to a customer.

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Certificate of completion | Customer |

### A4.2.1.7 Collect signed documentation

##### Actors

Performed by org units:

* Project Manager

**Duration Requirements**

Not regulated.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Certificate of completion | Customer |

##### Instructions

Process actor monitors timely return of a certificate of completion signed on a customer's behalf. On receipt of a certificate of completion process actor verifies that it has been signed and stamped by both parties (InTechProject LLC and a customer).

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Certificate of completion | Project Manager |

### A4.2.1.8 Add pre-project survey documentation to project folder

##### Actors

Performed by org units:

* Project Manager

**Duration Requirements**

Within one working day.

##### Actors Receive

| **No.** | **Objects** | **From** |
| --- | --- | --- |
| 1. | Certificate of completion | Project Manager |
| 2. | Pre-project survey report | Project Manager |

##### Instructions

Process actor receives a certificate of completion and includes it in a project folder, which is archived.

##### Actors Deliver

| No. | Objects | To |
| --- | --- | --- |
| 1. | Pre-project survey report | Leading Engineer |

##### End Boundary

Pre-project survey documentation is drawn up and approved

# Exceptions To Normal Process Flow

Here is the list of possible deviations from the normative course of the process and actions to take in case a deviation occurs.

### Customer's signature or seal is missing on the certificate of completion

**Responsible Manager:** Project Manager

**Actions To Take:** Return the certificate of completion to the customer for signature and stamping.

### Inadequate documentation provided for use during inspection

**Responsible Manager:** Leading Engineer

**Actions To Take:** Request the necessary information from the developers of the software requirements specifications and project tasks.

# KPIs

The following KPIs are used to assess process performance and efficiency:

| No. | KPI | Unit |
| --- | --- | --- |
| 1. | Avg cost of a pre-project survey | Thousand Euros |
| 2. | Avg deviation from project budget, % | Percentages |
| 3. | Number of completed pre-project surveys | Items |