InTechProject

A4 Schedule and perform project

Function Description

Version: 1.0.1

Status: Working

APPROVED

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 Title

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Date

List of Changes

| No. | Version | Status | Date of Change | Description |
| --- | --- | --- | --- | --- |
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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. |
| *Function* |  | An activity, process, or transformation (modeled by an IDEF0 box) identified by a verb or verb phrase that describes what must be accomplished. |
| *Function Actors*  | – | Resources (technological, work) used for performing a function. |
| *Function Controls* | – | Conditions regulating correct function performance. |
| *Function Inputs* | – | Resources (material, information) needed to perform a function and transformed by a function into outcomes. |
| *Function Mechanisms* | – | Resources (technological, work) used to perform a process. These are not fully consumed when performing one iteration of process. |
| *Function Outputs* | – | Resources (material, information) produced by a function. These are used to perform other processes or consumed by external customers. |
| *Function Owner* | – | A person who is accountable for the function result and has the authority to add or remove resources that affect the function performance. |
| *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. |
| *Sub-Function* | – | A function that is a part of the upper function. |

# General

This description of the “A4 Schedule and perform project” function of InTechProject is developed to:

* Unify rules and requirements to performance;
* Set responsibility for function result;
* Standardize document flow.

## Brief Description

Manage and perform project works.

## Objectives

Performace of the “A4 Schedule and perform project” function is aimed at achievement of the following objectives:

|  |
| --- |
| * Improve quality of project
 |
| * Complete project on time
 |

## Owner

The function is owned by:

* Director of Operations

## Actors

The function is performed by the following org units:

* Project team (Role)

## End Boundary

Installed and effectional system, put into operation.

## Documentation

Performance of the “Schedule and perform project” function is regulated by the following reference documents and requirements:

|  |
| --- |
| * Payment budget
 |

# Function Diagram

|  |
| --- |
|  |

# Relationships With Other Activities and External Environment

The “A4 Schedule and perform project” function has incoming and outgoing relationships with other activities whithin the organization and external environment:

## Inputs

| No. | Input | Objects | Comes From |
| --- | --- | --- | --- |
| Actor | Activity/External Environment |
| 1. | Contract on project implementation | Contract | Sales Manager | A2.3 Draw up contract and conclude contract with customer |
| 2. | Project description | Project description | Sales Department | A2.4 Initiate project |
| 3. | Suitable material assets | Material assets | Warehouseman | A6.5 Store and distribute material assets |

## Outputs

| No. | Output | Objects | Goes To |
| --- | --- | --- | --- |
| Receiver | Activity/External Environment |
| 1. | Customer obligations | Statement on entry into service | Budget and Finance Department | A7.2 Monitor income |
| 2. | Customer satisfaction report | Customer satisfaction report | Head of Sales Department | A1.1 Market research |
| 3. | Instrument for maintenance | Instrument | Engineering Department | A5.2 Repair, restore and upgrade instruments |
| 4. | Instrument for verification | Instrument | Engineering Department | A5.3 Verify and calibrate instrument |
| 5. | Need for material assets | Application for materials | Head of Procurement Department | A6.1 Develop procurement plan |
| 6. | Need for tools | Application for instruments | Head of Engineering Department | A5.1 Plan instrument purchase |
| 7. | Primary financial reporting - perform project | Certificate of completionDelivery documentationExecutive documentationPre-project survey reportReport on construction and installation worksReport on start-up worksSite acceptance statementSite delivery statementStatement of start-up worksStatement on entry into serviceTechnical Design | Budget and Finance Department | A7.6 Prepare reporting |
| 8. | Project plan | Project plan | Budget and Finance Department | A7.1 Draw up income and expenditure budget |
| 9. | System put into operation | System | Customer | Customer |

## Controls

| No. | Input | Objects | Comes From |
| --- | --- | --- | --- |
| Actor | Activity/External Environment |
| 1. | Payment budget | Payment budget | Budget and Finance Department | A7.4 Draw up payment budget |

## Mechanisms

| No. | Input | Objects | Comes From |
| --- | --- | --- | --- |
| Actor | Activity/External Environment |
| 1. | Capable personnel | Personnel | HR Department | A3.5 Guarantee staff efficiency |
| 2. | Workable instrument | Instrument | Engineering Department | A5.4 Store and issue instrument |

# Function Flow

### A4.1 Plan projects

**Brief Description**

Plan projects in accordance with the requirements of a customer and the capacities of InTechProject.

##### Owner

* Director of Operations

##### Actors

Performed by org units:

* Project Manager

**End Boundary**

Project plan, project requirements specification, and project tasks.

##### Inputs

| No. | Input | Objects | Actor | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Contract on project implementation | Contract | Sales Manager | A2.3 Draw up contract and conclude contract with customer |
| 2. | Project description | Project description | Sales Department | A2.4 Initiate project |
| 3. | Project progress information |  | Project team | A4.2 Implement project |

##### Outputs

| No. | Output | Objects | Receiver | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Need for material assets | Application for materials | Head of Procurement Department | A6.1 Develop procurement plan |
| 2. | Need for tools | Application for instruments | Head of Engineering Department | A5.1 Plan instrument purchase |
| 3. | Preliminary design | Preliminary design | Leading Engineer | A4.2.1 Perform pre-project survey |
| Leading EngineerProject Manager | A4.2.2 Draw up and analyze Technical Design |
| 4. | Project plan | Project plan | Project team | A4.2 Implement project |
| Project team | A4.3.1 Put system into operation |
| Budget and Finance Department | A7.1 Draw up income and expenditure budget |
| 5. | Project requirements specification | Project requirements specification | Leading Engineer | A4.2.1 Perform pre-project survey |
| Leading EngineerProject Manager | A4.2.2 Draw up and analyze Technical Design |
| Leading Engineer | A4.3.1 Put system into operation |
| 6. | Project tasks | Project tasks | Leading Engineer | A4.2.1 Perform pre-project survey |
| Leading EngineerProject Manager | A4.2.2 Draw up and analyze Technical Design |
| Persons performing construction and installation operations | A4.2.3.3 Perform construction and installation operations |
| Leading Engineer | A4.2.4 Prepare and issue executive documentation |
| Technician | A4.2.5 Perform start-up works |

### A4.2 Implement project

**Brief Description**

Implement a project in accordance with a developed project requirements specification and a project plan within the set timeframe.

##### Owner

* Director of Operations

##### Actors

Performed by org units:

* Project team (Role)

**End Boundary**

Effective system, installed and put into operation in accordance with project requirements specification within the set timeframe.

##### Documentation

Performance of the function is regulated by the following reference documents and requirements:

|  |
| --- |
| * Payment budget
 |
| * Project plan
 |
| * Project requirements specification
 |
| * Project tasks
 |

##### Inputs

| No. | Input | Objects | Actor | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Preliminary design | Preliminary design | Design Engineer | A4.1.3 Create preliminary design |
| 2. | Suitable material assets | Material assets | Warehouseman | A6.5 Store and distribute material assets |

##### Outputs

| No. | Output | Objects | Receiver | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Executive documentation | Executive documentation | Leading Engineer | A4.3.1 Put system into operation |
| 2. | Information on the end of start-up works | Information on the end of start-up works | Accountant | A4.3.1 Put system into operation |
| 3. | Instrument for maintenance | Instrument | Engineering Department | A5.2 Repair, restore and upgrade instruments |
| 4. | Instrument for verification | Instrument | Engineering Department | A5.3 Verify and calibrate instrument |
| 5. | Pre-project survey documentation | Certificate of completionPre-project survey report | Project Manager | A4.3.3 Close project |
| 6. | Primary financial reporting – implement project | Certificate of completionExecutive documentationPre-project survey reportReport on construction and installation worksReport on start-up worksSite acceptance statementSite delivery statementStatement of start-up worksTechnical Design | Budget and Finance Department | A7.6 Prepare reporting |
| 7. | Project progress information |  | Design Engineer | A4.1.3 Create preliminary design |
| Project Manager | A4.1.4 Develop and adjust project plan |
| 8. | Technical Design documentation | Certificate of completionTechnical Design | Project Manager | A4.3.3 Close project |
| 9. | Workable system | System | Persons performing site delivery and acceptance | A4.3.1 Put system into operation |

##### Controls

| No. | Input | Objects | Actor | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Payment budget | Payment budget | Budget and Finance Department | A7.4 Draw up payment budget |
| 2. | Project plan | Project plan | Project Manager | A4.1.4 Develop and adjust project plan |
| 3. | Project requirements specification | Project requirements specification | Leading EngineerProject Manager | A4.1.2 Develop project requirements specification |
| 4. | Project tasks | Project tasks | Project Manager | A4.1.6 Draw up and issue project tasks |

##### Mechanisms

| No. | Input | Objects | Actor | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Workable instrument | Instrument | Engineering Department | A5.4 Store and issue instrument |

### A4.3 Complete project and analyze project results

**Brief Description**

Put a system into operation and receive funds for a completed project.

##### Owner

* Director of Operations

##### Actors

Performed by org units:

* Project team (Role)

**End Boundary**

Effective system, put into operation, and payment received.

##### Documentation

Performance of the function is regulated by the following reference documents and requirements:

|  |
| --- |
| * Project plan
 |
| * Project requirements specification
 |

##### Inputs

| No. | Input | Objects | Actor | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Executive documentation | Executive documentation | Project Manager | A4.2.4 Prepare and issue executive documentation |
| 2. | Information on the end of start-up works | Information on the end of start-up works | Project Manager | A4.2.5 Perform start-up works |
| 3. | Workable system | System | Technician | A4.2.5 Perform start-up works |

##### Outputs

| No. | Output | Objects | Receiver | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Customer obligations | Statement on entry into service | Budget and Finance Department | A7.2 Monitor income |
| 2. | Customer satisfaction report | Customer satisfaction report | Head of Sales Department | A1.1 Market research |
| 3. | List of comments on project | List of comments on project | Head of Sales Department | A1.1 Market research |
| 4. | Marginal income | Monetary assets | Budget and Finance Department | A7.2 Monitor income |
| 5. | Primary financial reporting - put system into operation | Delivery documentationStatement on entry into service | Budget and Finance Department | A7.6 Prepare reporting |
| 6. | Report folder | Budget performance reportCertificate of completionDelivery documentationExecutive documentationPre-project survey reportReport on construction and installation worksReport on start-up worksSite acceptance statementSite delivery statementStatement of start-up worksStatement on entry into serviceTechnical Design |  | {Tunnel} |
| 7. | System put into operation | System | Customer | Customer |

##### Controls

| No. | Input | Objects | Actor | Activity/External Environment |
| --- | --- | --- | --- | --- |
| 1. | Project plan | Project plan | Project Manager | A4.1.4 Develop and adjust project plan |
| 2. | Project requirements specification | Project requirements specification | Leading EngineerProject Manager | A4.1.2 Develop project requirements specification |

# Function KPIs

The following KPIs are used to assess performance and efficiency of the function:

| No. | KPI | Unit |
| --- | --- | --- |
| 1. | Number of warranty cases | Items |
| 2. | Percentage of projects completed on time | Percentages |
| 3. | Percentage of work subcontracted | Percentages |

1. Org Units of Roles Mentioned in the Document

| No. | Role | Org Unit | Department | Activity Object |
| --- | --- | --- | --- | --- |
| 1. | Persons performing construction and installation operations | Installer | Installation Site |  |
| Subcontractor |  |  |
| Technician | InTechProject |  |
| 2. | Persons performing site delivery and acceptance | Customer |  |  |
| Head of Installation Site | Installation Site |  |
| Installer | Installation Site |  |
| Leading Engineer | InTechProject |  |
| Project Manager | InTechProject |  |
| Regulatory bodies |  |  |
| Technician | InTechProject |  |
| 3. | Project team | Head of Installation Site | Installation Site |  |
| Installer | Installation Site |  |
| Leading Engineer | InTechProject |  |
| Project Manager | InTechProject |  |
| Technician | InTechProject |  |