

# Technology Services Standard Operating Procedure

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## Intake Forms

**Process:** All request for software, services from CUA schools, offices or departments shall be submitted to the TS Project Management Office (PMO) on the TS Intake Form.

**Procedure:** The Requestor shall submit the intake form using the following steps:

1. Download the intake form from the Technology Service home page [computing.cua.edu/about/projects.cfm](http://computing.cua.edu/about/projects.cfm).
  - Fill in the Requestor information, this includes budget information, signatures, VP/Provost signature and the name of the project champion.  
*The form will not be accepted if the appropriate signatures are not on the form.*
  - Provide a description of the problem that you hope to solve.
  - Describe how this will benefit the CUA community.
  - Describe how you will measure success.
  - Provide the date that you would like to have the project completed.
2. When the form is complete and has the appropriate signatures, scan the form and email it to [ts-pmo@cua.edu](mailto:ts-pmo@cua.edu)

### Tips on when to submit an Intake Form or a Ticket:

Submit an intake form for:		Submit a Ticket for:
Enhancements or changes to a current system		New Account or Account Access request
Requests for a new system or new functionality for an existing system		If something you already use is not functioning correctly
Any work that isn't already "In Plan", might require over 40 hours of effort to complete, or might involve new expenditures		General questions

## Technology Services (TS) Intake Form

### Request Details

#### 1. Requestor

Please supply Name, Department, Phone, and Email of the person requesting the project. If budget has been allocated as part of the requestor's budget, please specify how much.

<b>Date</b>	
<b>Name/Department</b>	
<b>Phone/Email</b>	
<b>Org. Number</b>	
<b>Level 1 Signature</b>	<i>(If applicable)</i>
<b>Level 2 Signature</b>	<i>(Head of School/Office/Department)</i>
<b>VP/Provost Signature</b>	
<b>Project Champion</b>	<i>(Has Authority to make decisions)</i>

#### 2. Project/Activity high-level description

Please describe what you would like from TS, what problem are you trying to solve (this does not have to include technical detail).

**3. CUA Benefit**

*Please describe in as much detail as possible, how this will benefit the CUA Community.*

*Is there another school, office or department will benefit from this?*

**4. Success metrics**

List any identifiable measures of project success (e.g., student satisfaction rises by 2%) and how they will be measured.

**5. Desired timeframe**

*Please indicate when this project is desired and what is driving that timeframe (e.g., would like this in place by May 2014 to support Employee Performance Evaluation cycle).*

## TS Preliminary Assessment

Interview the requestor and determine the following:

Date Assigned	Assigned to (PMO, ERP, Tech Comm or Other)

### *1. Summary of need*

Assessment of what is actually needed (regardless of what is being requested)?

### *2. Current system/process description and approximate cost*

Is this a new system, current system replacement, upgrade, enhancement, automation or vendor mandated? Detail why it is needed, the rationale.

### *3. Options available/recommended solutions*

Possible technical solutions (e.g., buy a package, build in house, partial implementation, use existing system as-is or with small tweaks). This should be a VERY high level list of options designed to give a general idea of what options exist.

### *4. Dependencies*

What projects, systems, schools, offices or departments will be impacted, or can benefit from this?

**5. Benefits**

How will this benefit the CUA Community (schools, offices, departments)?

**6. Scope**

The characteristics of the products, services, and/or results this project will produce.

**7. Data integration needs**

Specify what data needs to flow in and out of this system if any. Note the nature of the data (sensitive or not).

**8. Rough level of effort to complete the project**

(E.g., 2-4 person weeks, 50-100 hours, 1-4 person months)

**9. Effort needed to fully analyze, design and estimate (Full Assessment)**

Estimate how much time is needed to complete a full assessment

**10. Your recommendation for this request**

<b>Date Fact Finding Completed</b>	<b>Name/Signature</b>

**STEP III**

**Informed requester of the results of TS Fact Finding**

<b>Date of conversation</b>	<b>With who</b>	<b>Signature</b>
<b>Approved for Full Assessment</b>		<b>Denied for Full Assessment</b>

**Additional Comments:**