ZINA WORKFLOW MANAGEMENT User's guide

CRIA - Key User

ZINA LAT applies to: All f-Nokia CTs in LAT

ZINA

- CRIA stands for Change Request Innovative Automation. It's a tool developed by Business Operations team for Latin America.

- CRIA tool aims to allow automation in the approval chain for Change Requests and centralize the database with information associated with these CRs.

- CRIA acts in the process of Change Requests approval. It is still needed and mandatory the usage of IPM for all other processes associated with CRs.

- This document describes the operational procedures for end users to import CR data from IPM and the benefits of the CRIA tool usage.

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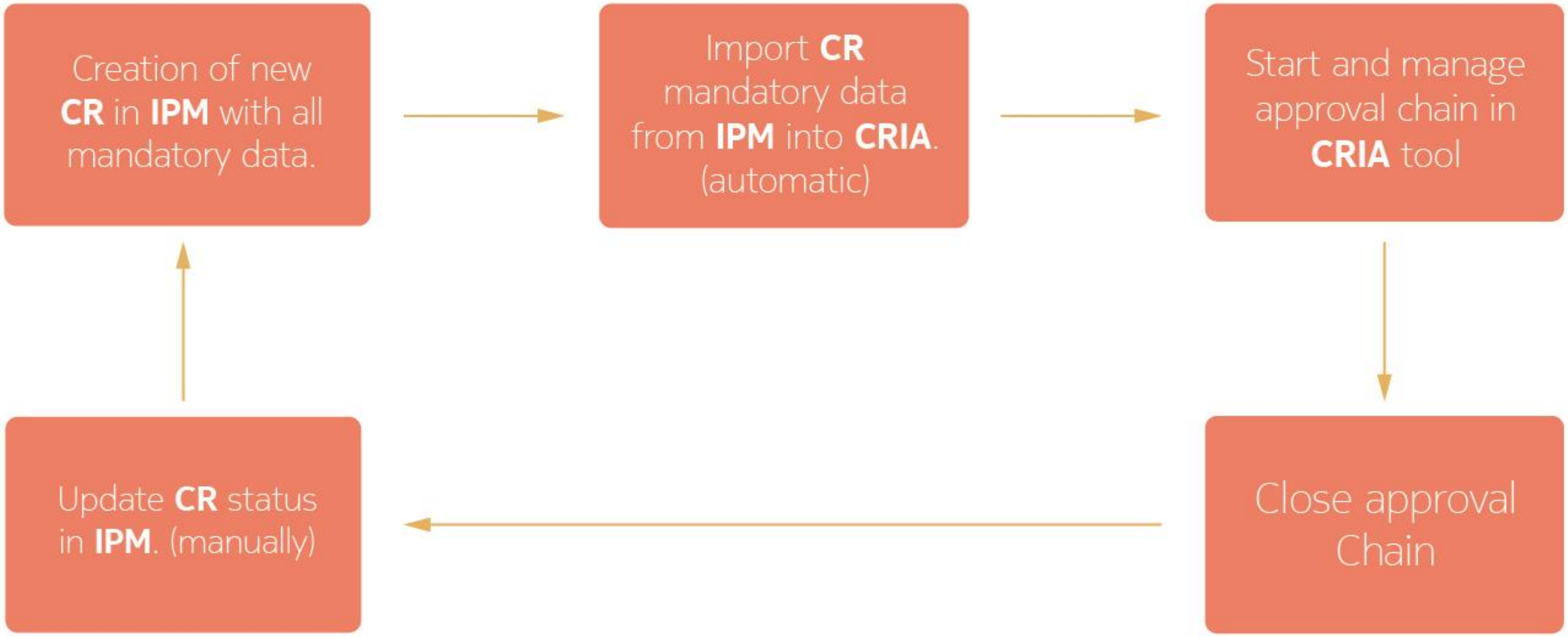
CR workflow using IPM and CRIA.



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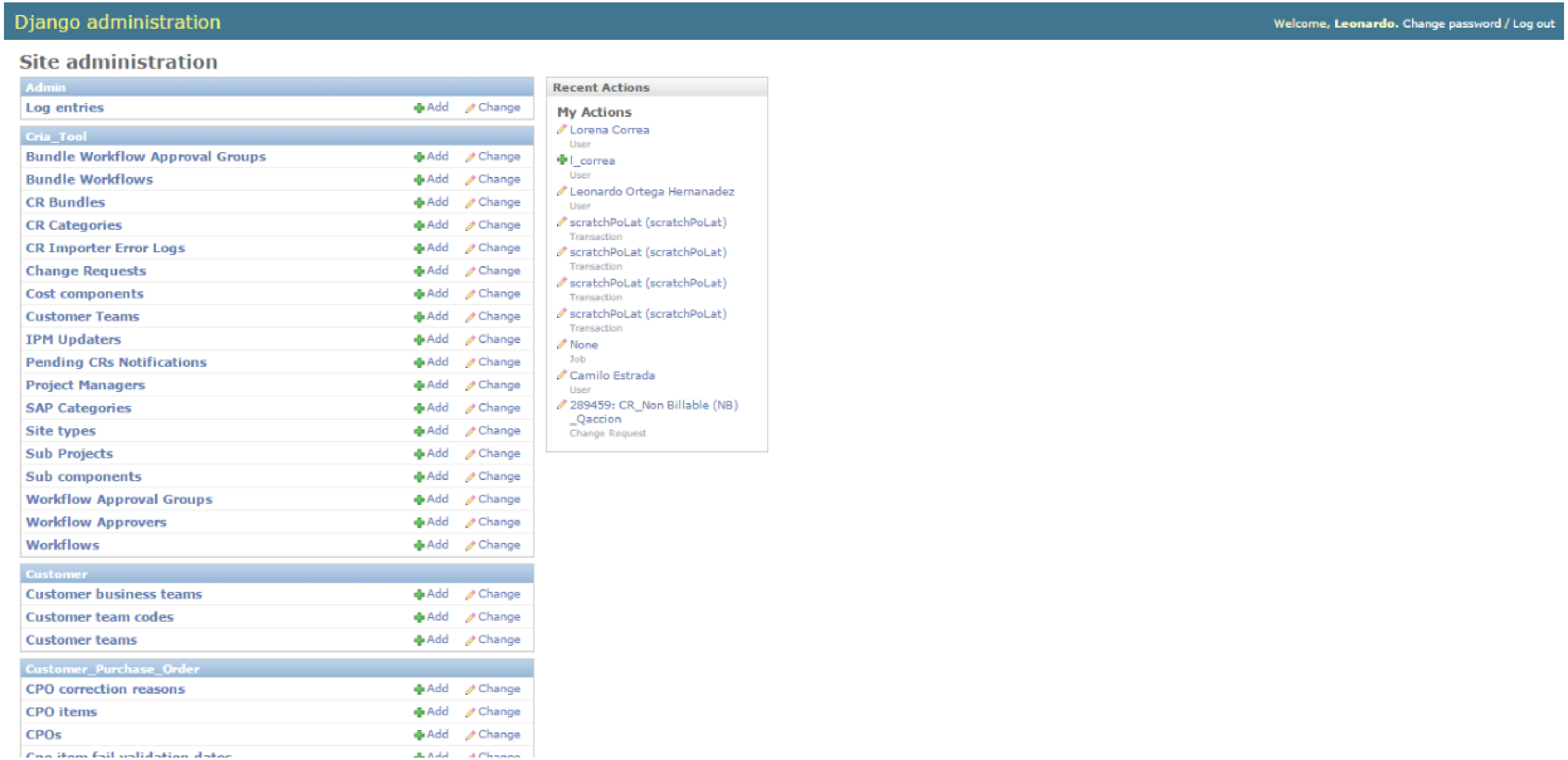
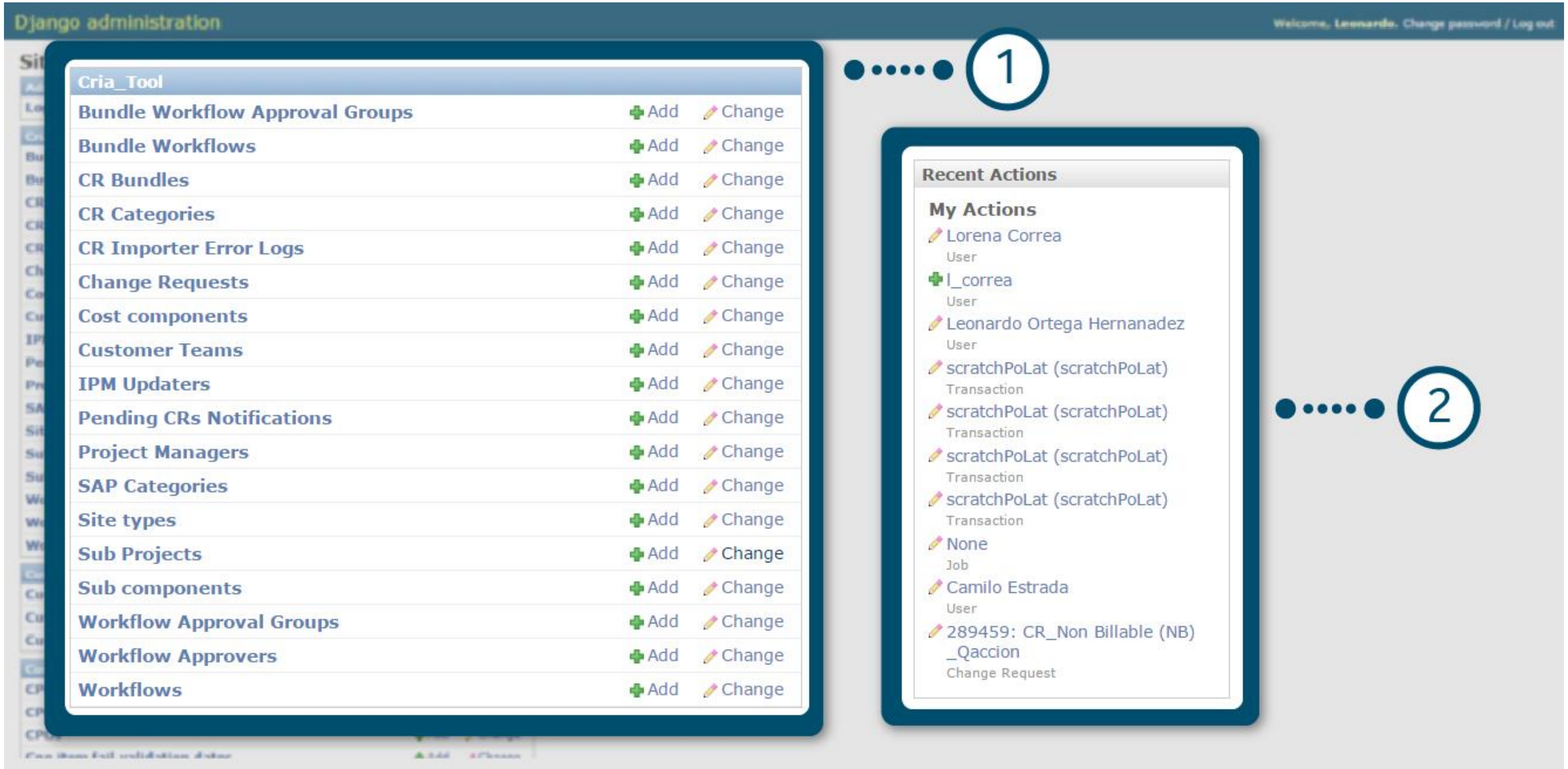
Access to ZINA Workflow management admin from NSN INTRA by typing http://zina.net.nokia.com/admin/ in your browser' search bar.



1. On the left side, under Change Request menu, the Key user will have access to some configurations submenus for CRIA Tool.
2. On the right side a summary of the user last actions.



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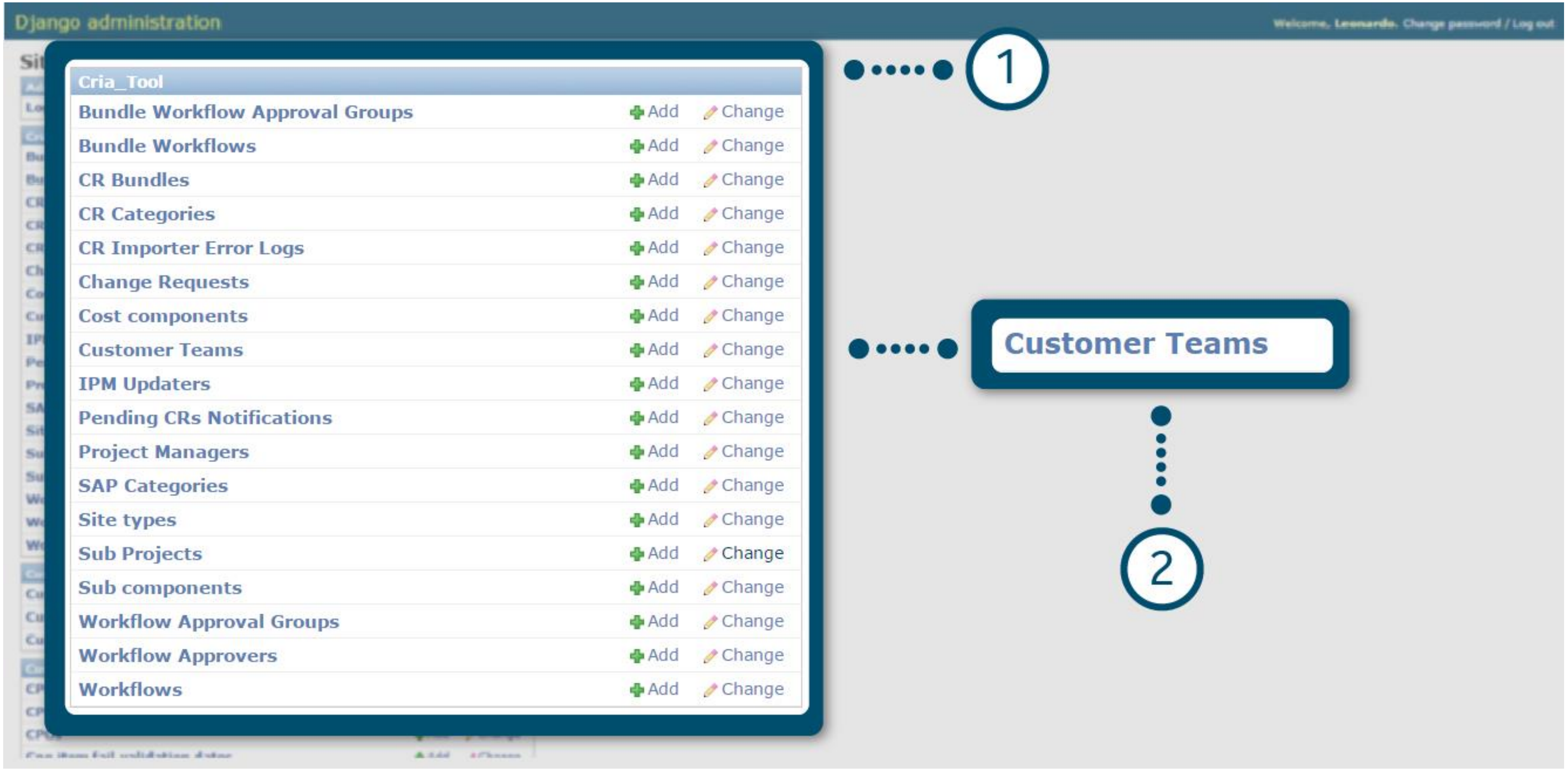
1. In CRIA Tool administration menu.
2. Click on **"Customer Team"** link

Important: Customer teams are imported from IPM, with the names available in IPM. In CRIA we will just setup configuration allowed for a specific customer team.



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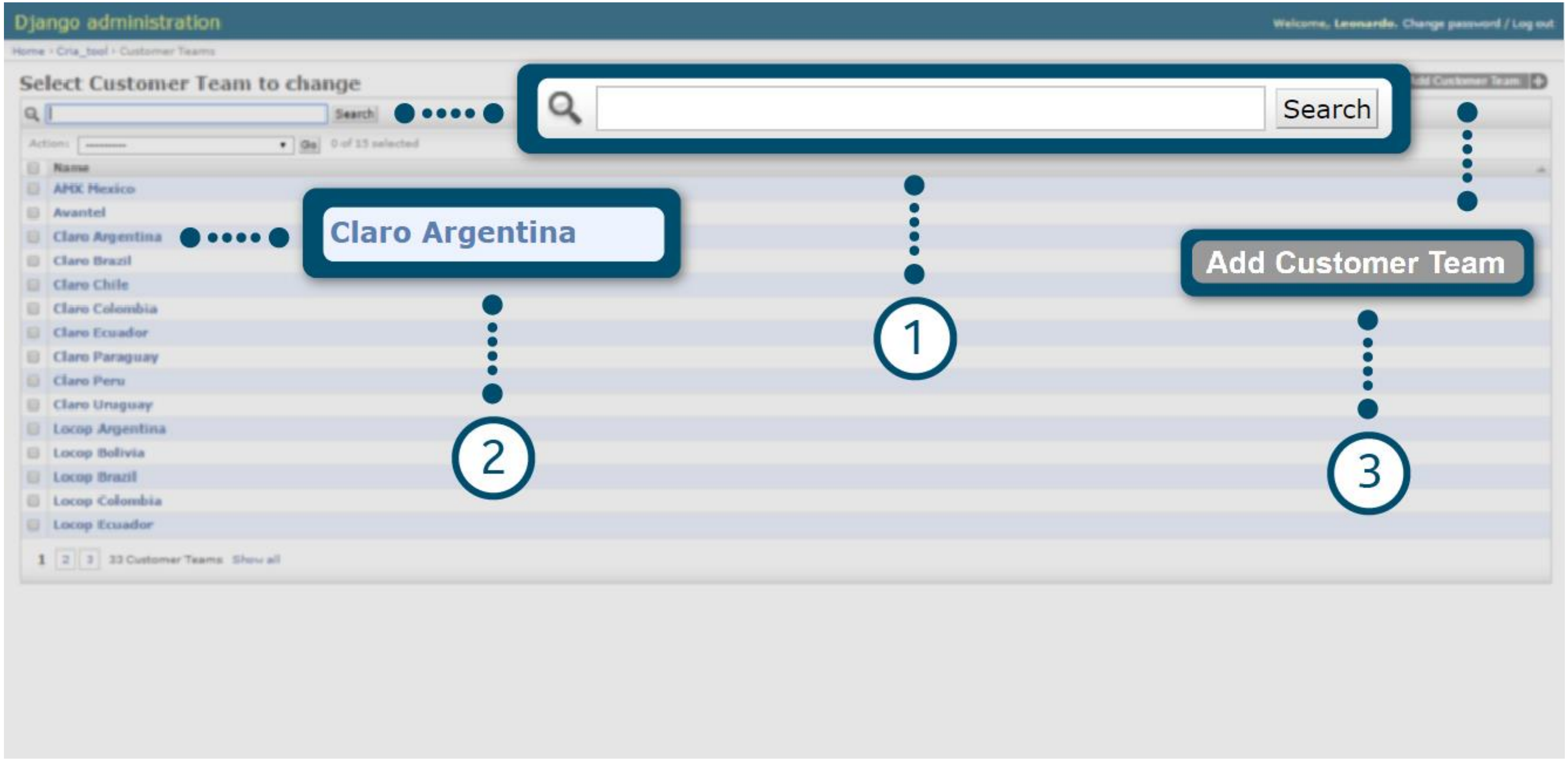
1. You can search for a CT name. The list of all available CT has updated automatically. **If your CT is not in the list, please contact technical support.**
2. You can click on an existent CT to modify its definitions.



Once you selected a CT:

1. Check the box for allowing **“Advanced Billable”** CR type in your CT (AMX Chile only, at this moment). Or Check the boxes to allow **“pre-associated”** (TIM Brazil only) or **“post-associated bundle CR”** (AMX Chile only) in your CT (definition of pre and post will be in bundle session).
2. Choose the best alternative for saving.

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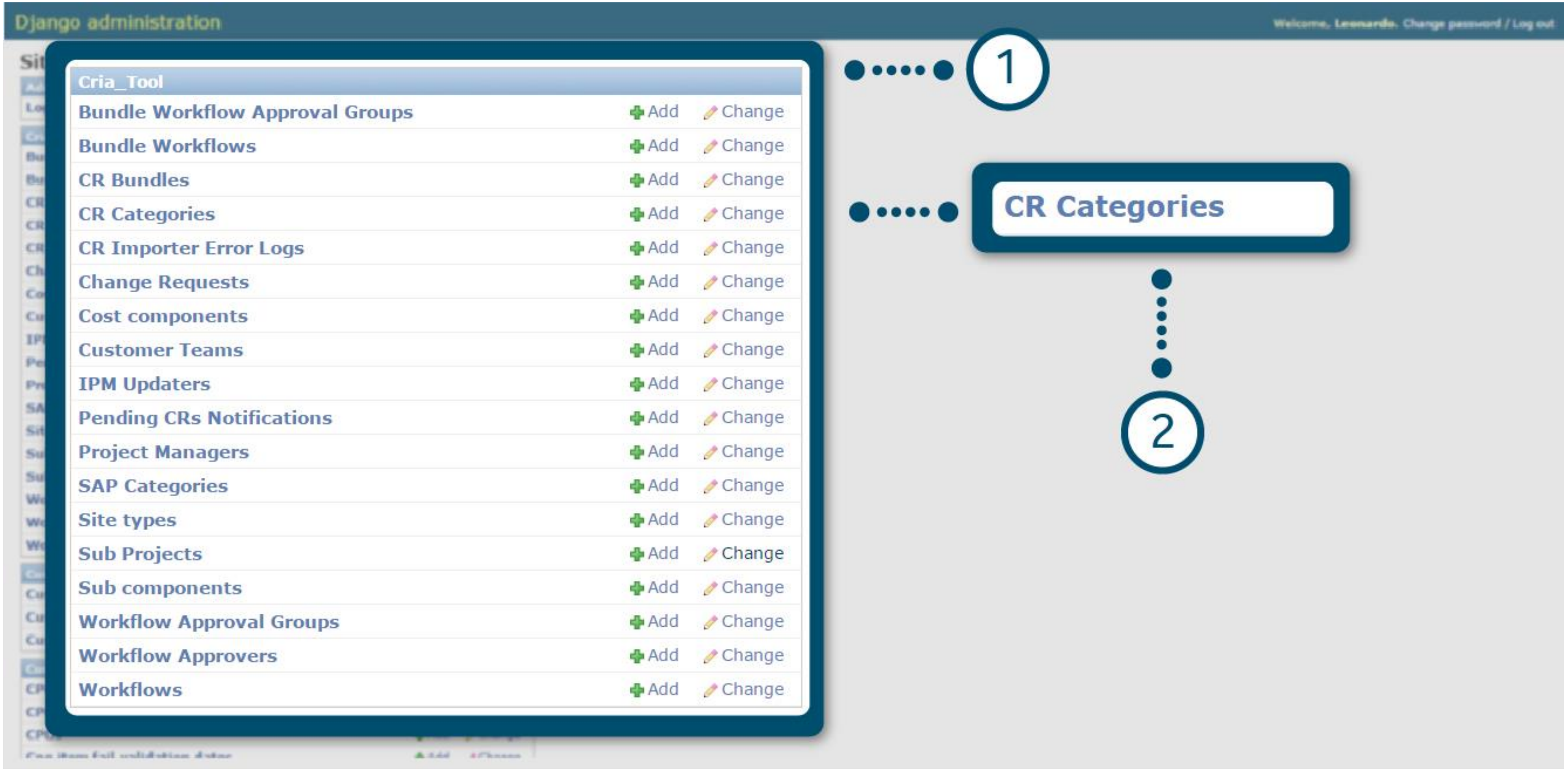
1. In CRIA Tool administration menu.
2. Click on **“CR Categories”** or on the respective **“add/change”** links.



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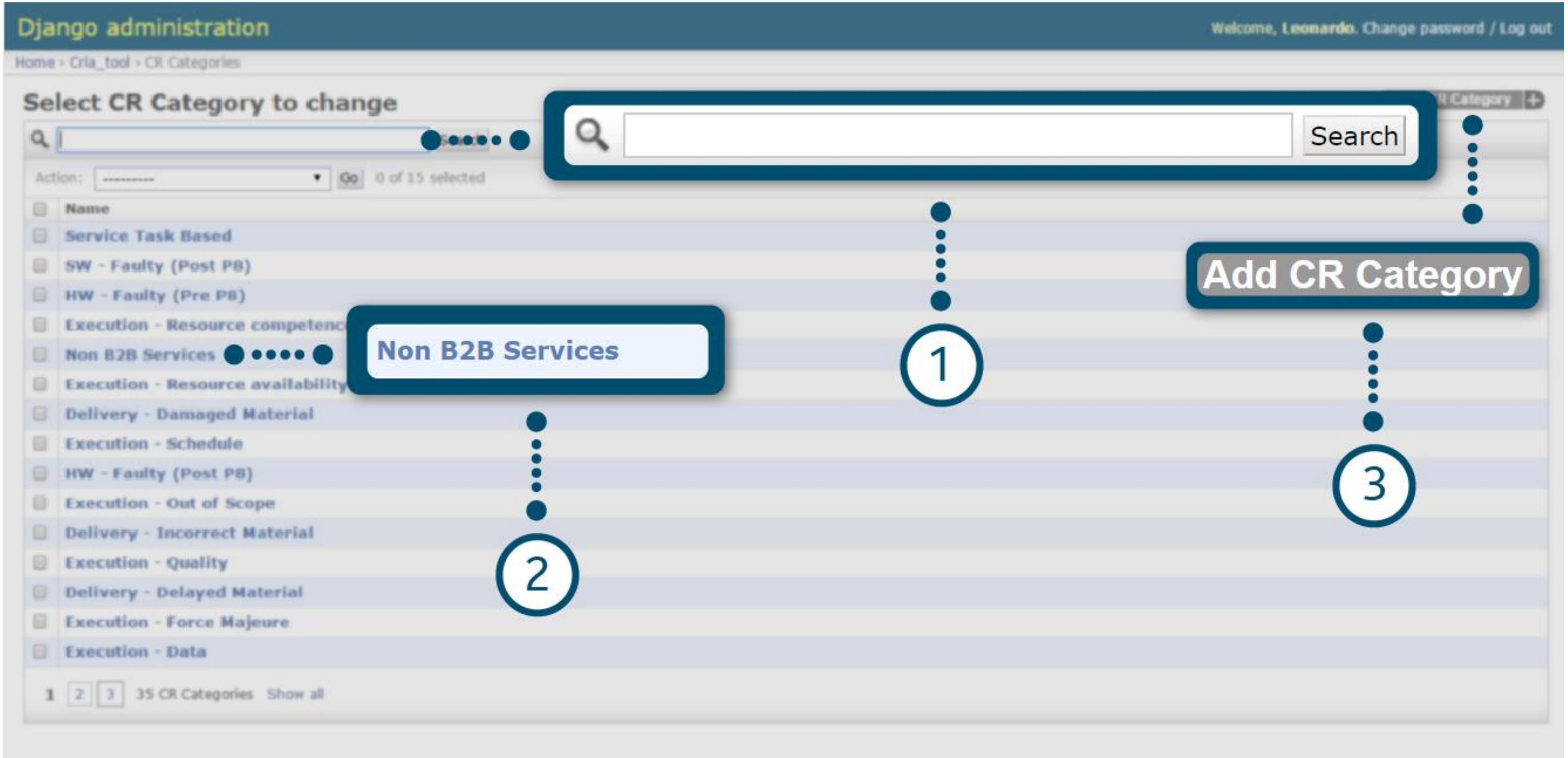
1. You can search for a CR Category. The list of all available CT has updated automatically.
2. Click on existent CR Category to modify its definitions.
3. Click on “Add CR Category” to add new.



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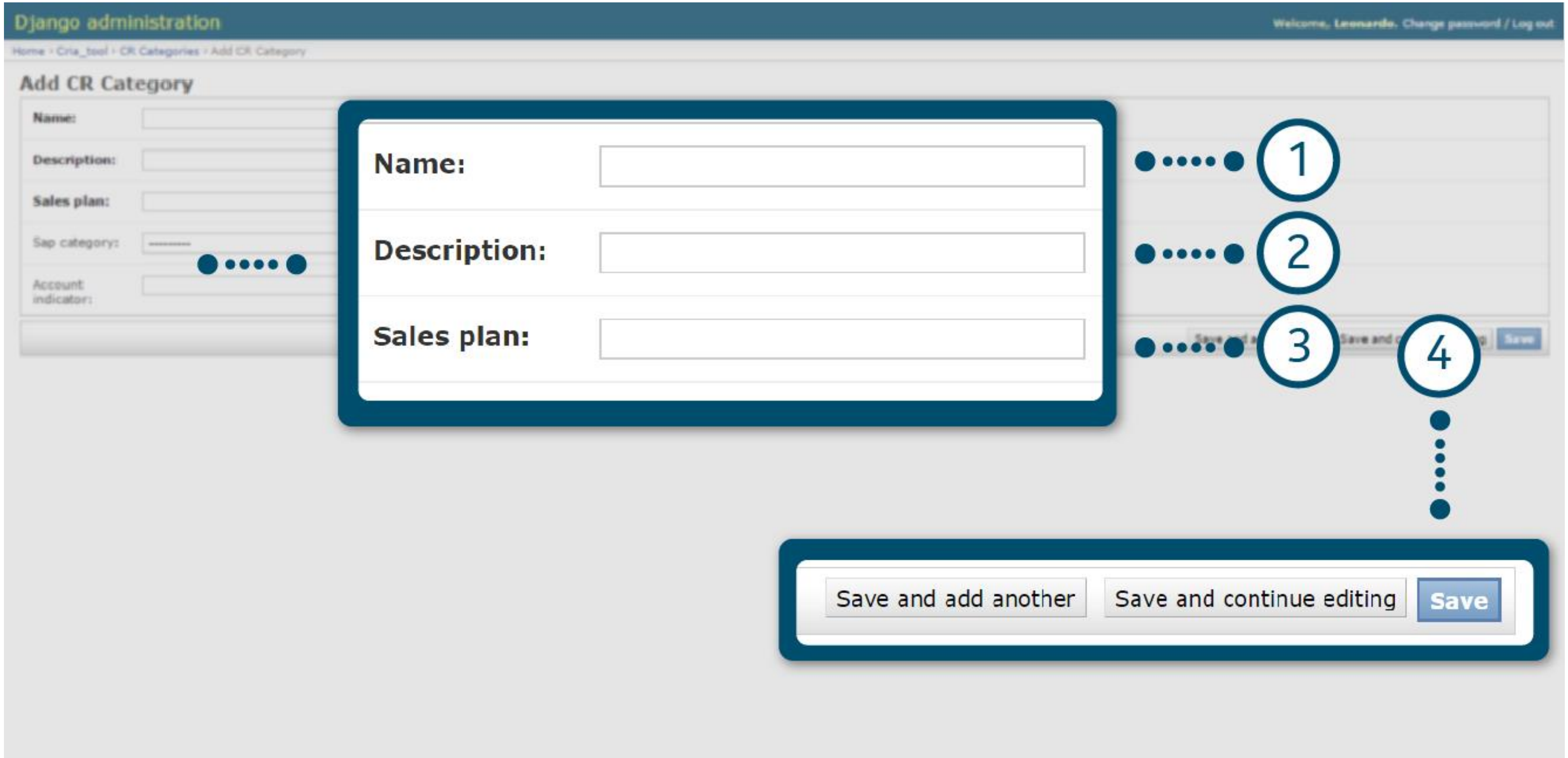
1. Define Name for CR Category.
2. Provide a short description of the CR Category. (it will appear on CRIA User area)
3. The sales plan is just a logical conclusion of **“billable”** or **“non billable”** based on field 2, but it’s not linked to any other field in the CRIA user area.
4. Choose the best alternative for saving.

CR Category names should be 100% aligned with names used and valid in IPM.



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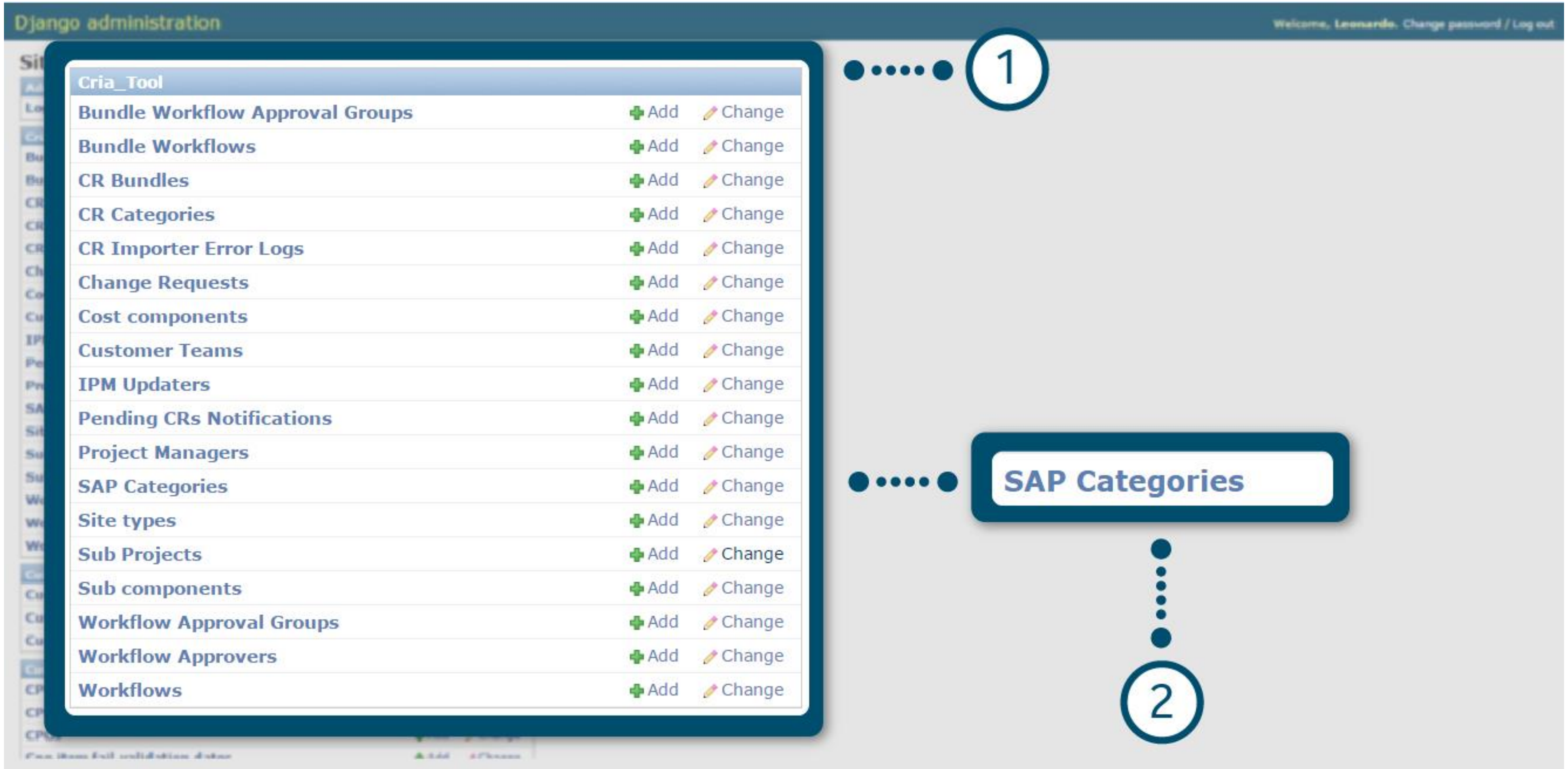
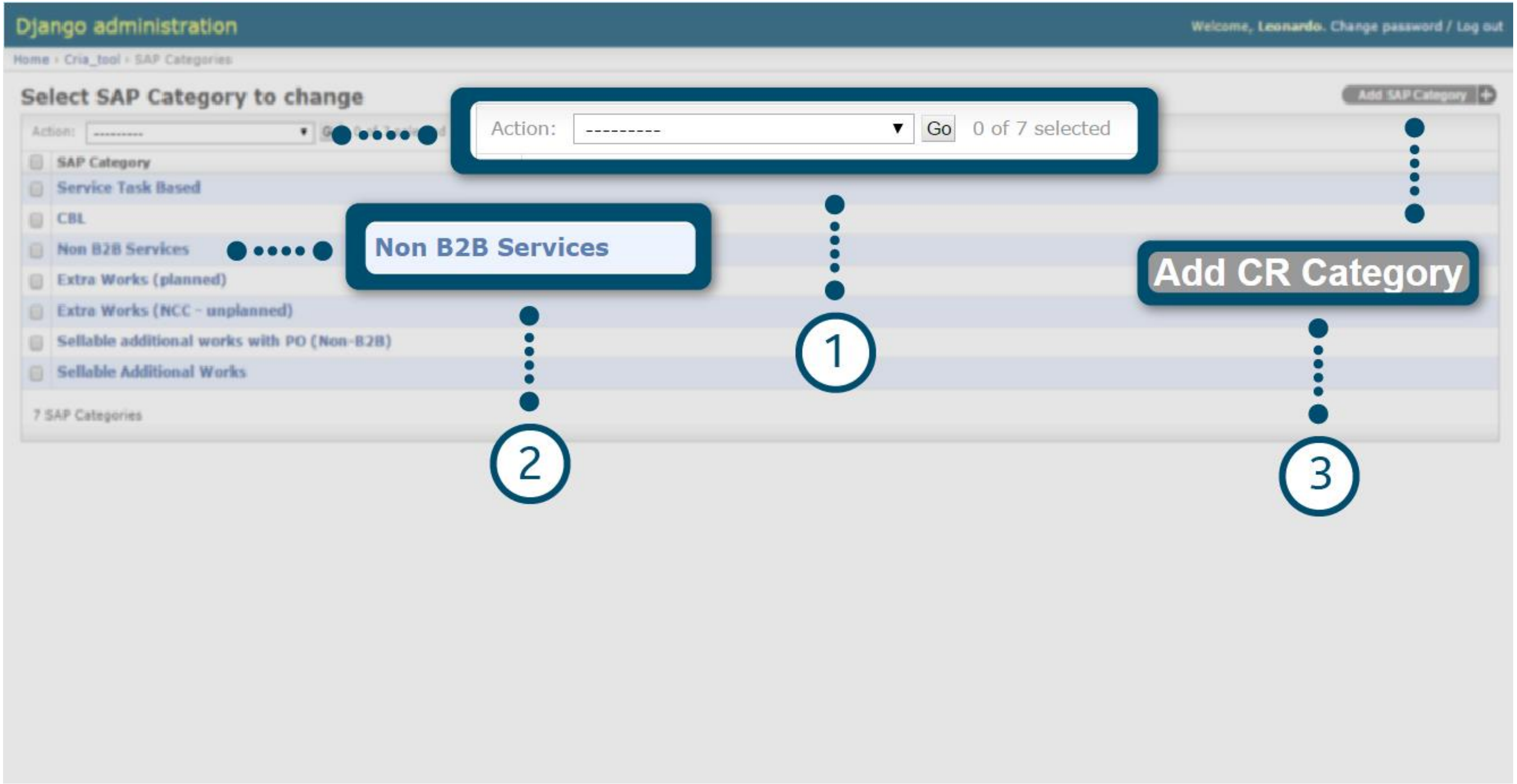
1. In CRIA Tool administration menu.
2. Click on “SAP Category” link.



1. You can search for a SAP Category. The list of all available CT has updated automatically.
2. Click on existent CR SAP Category to modify its definitions.
3. Click on **“Add SAP Category”** to add new.

CR SAP Category names should be 100% aligned with names used and valid in IPM.



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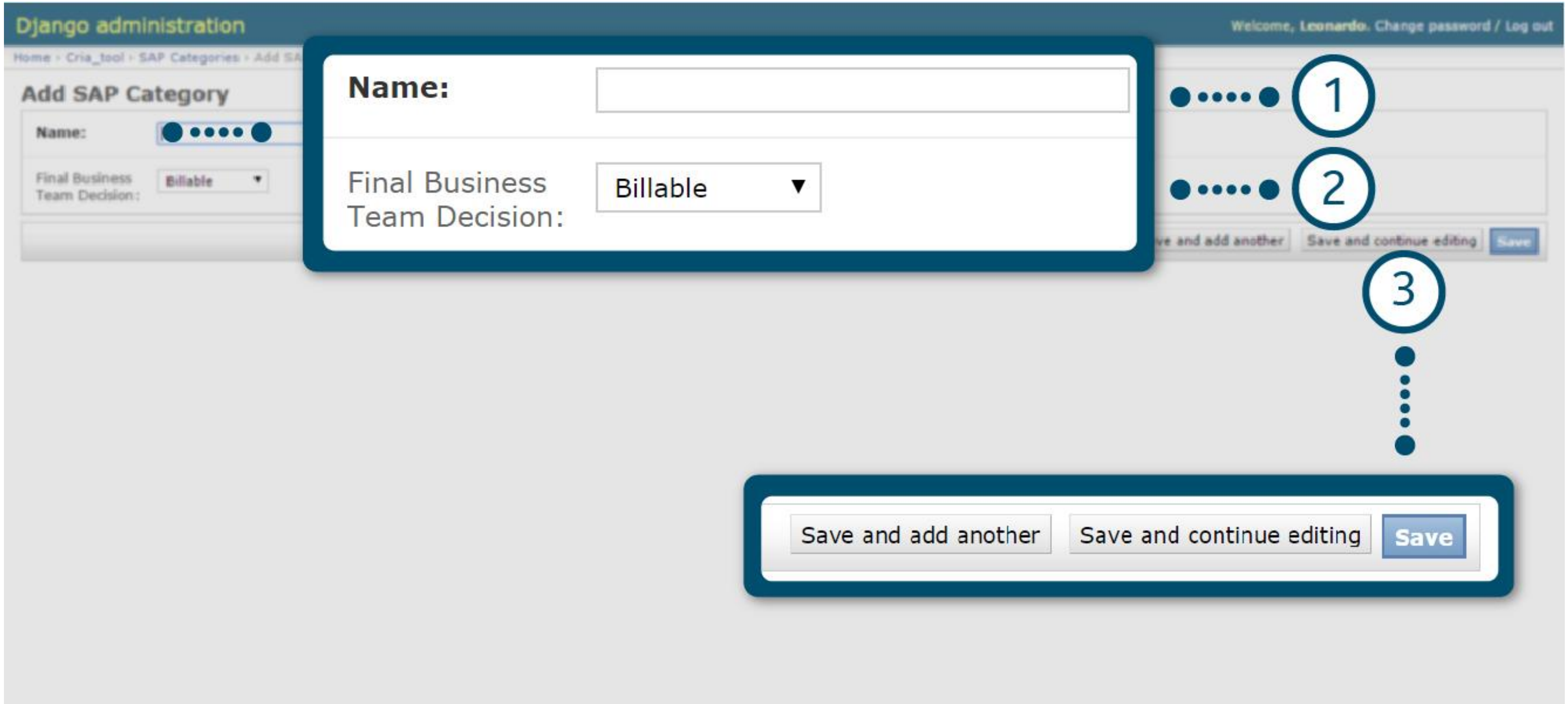
1. Insert SAP Category name (current categories available in IPM already included in CRIA)
2. Associate Billability logical decision.
3. Choose the best alternative for saving.



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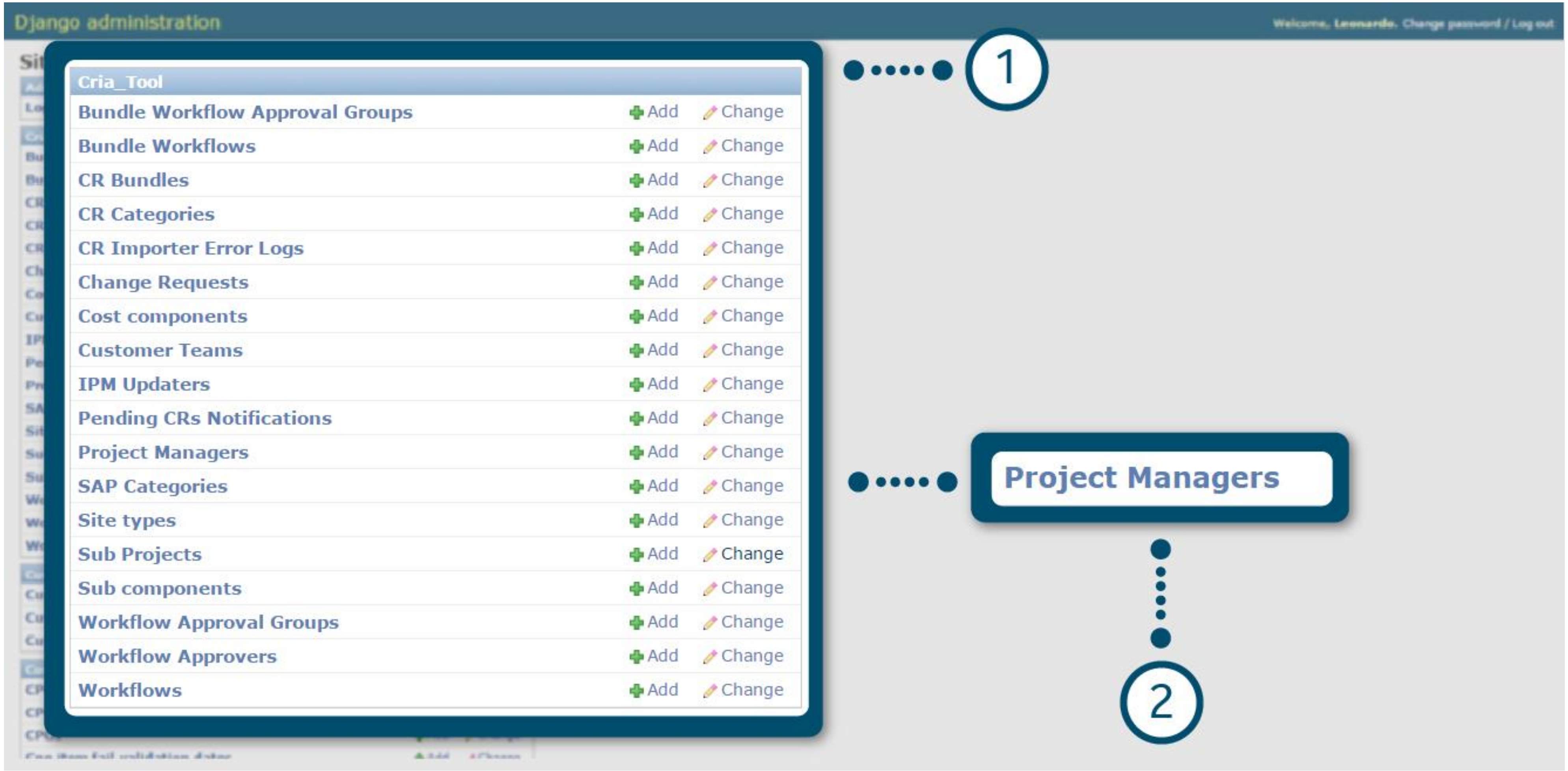
CRIA – Create a new Project Manager

1. In CRIA Tool administration menu.
2. Click on "Project Managers" link.



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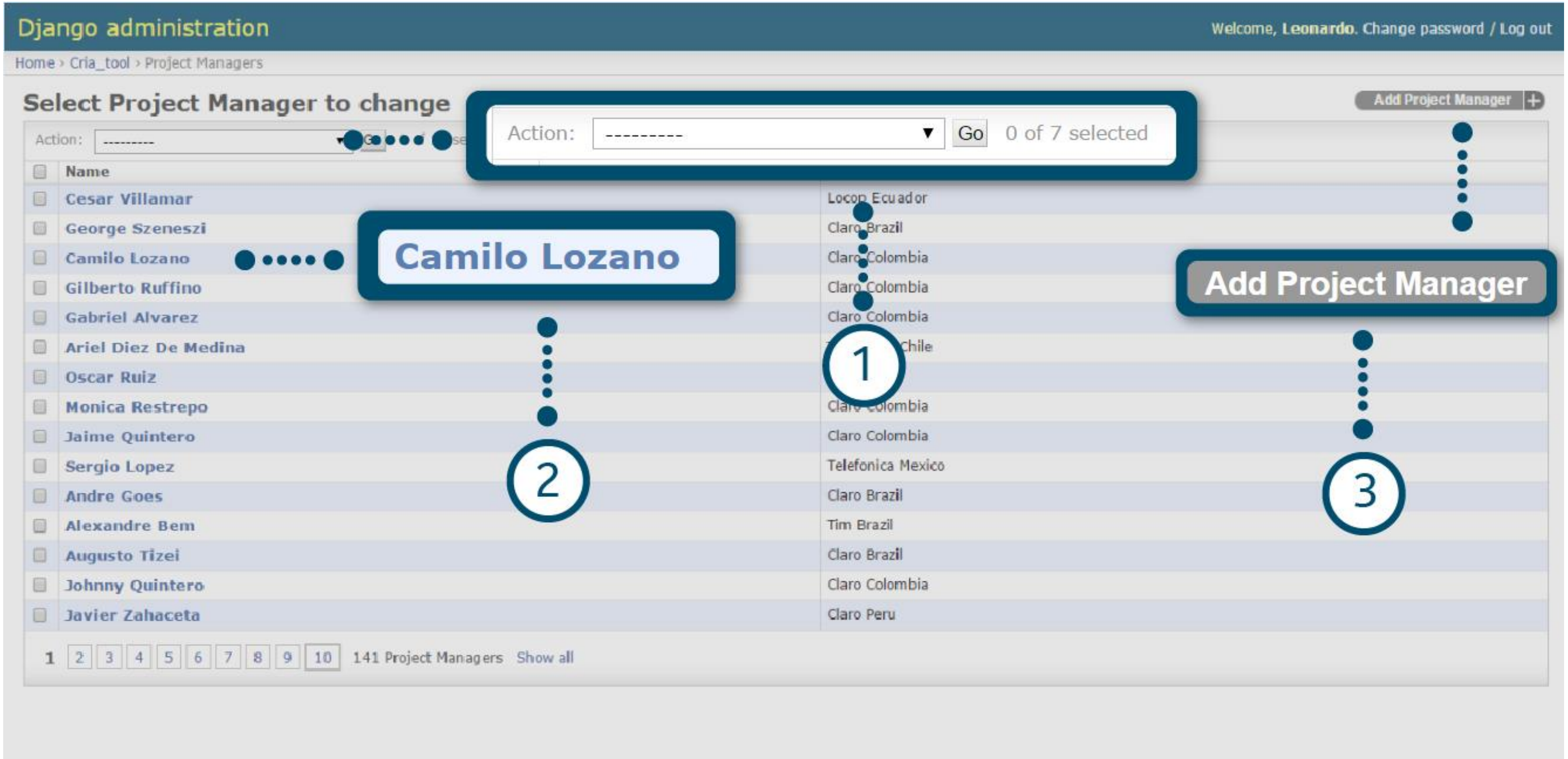
1. You can delete any Project Manager with the **“Action”** option.
2. Click on an existent name to modify its fields.
3. Click on **“Add Project manager”** to add a new one.



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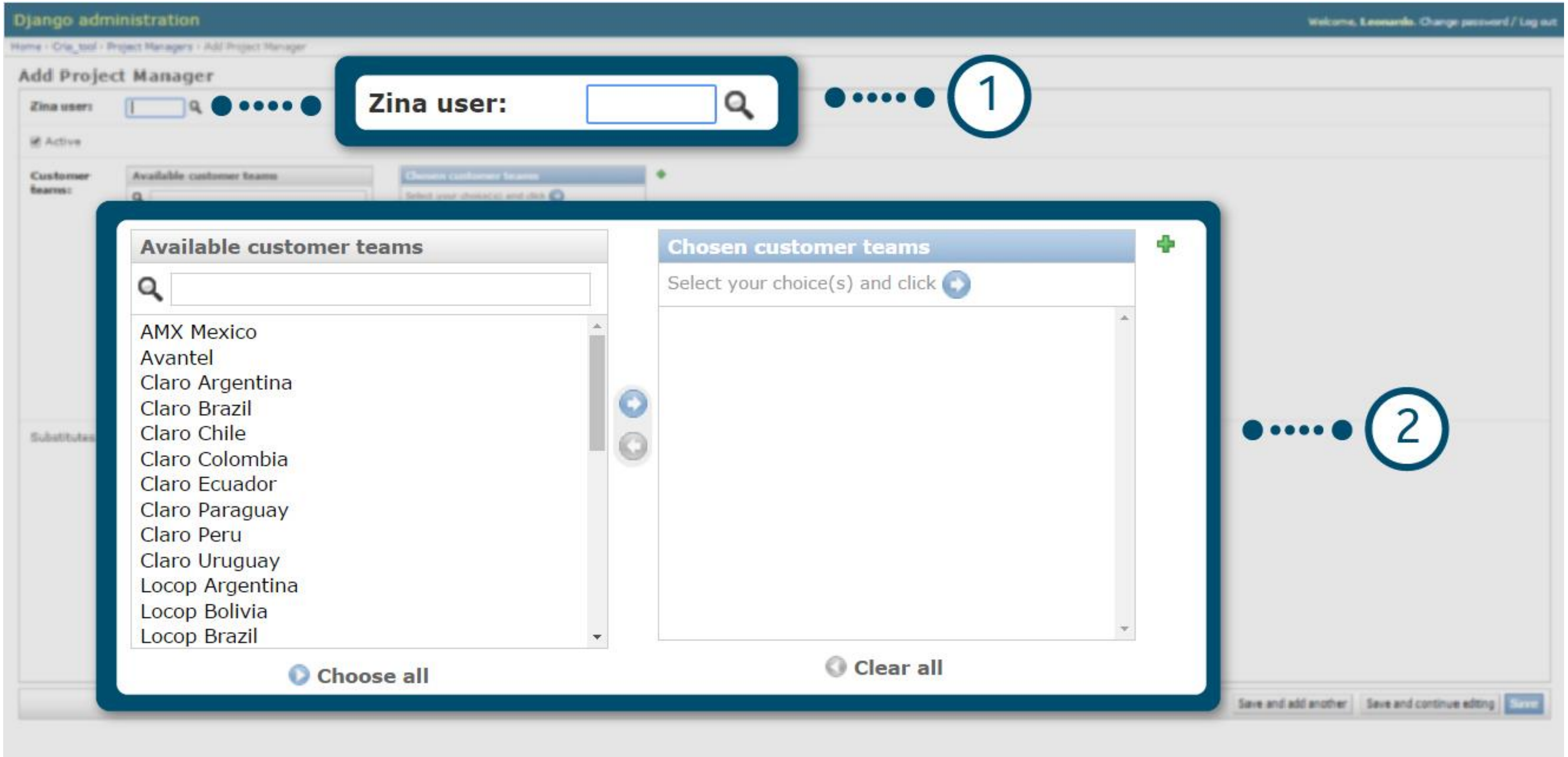
1. You should enter Zina User ID, or click on search icon to look for a name.
2. Tool will provide the list with all available customer teams to which the PM can be associated. Pick up from left side list items and include them in the right side list.



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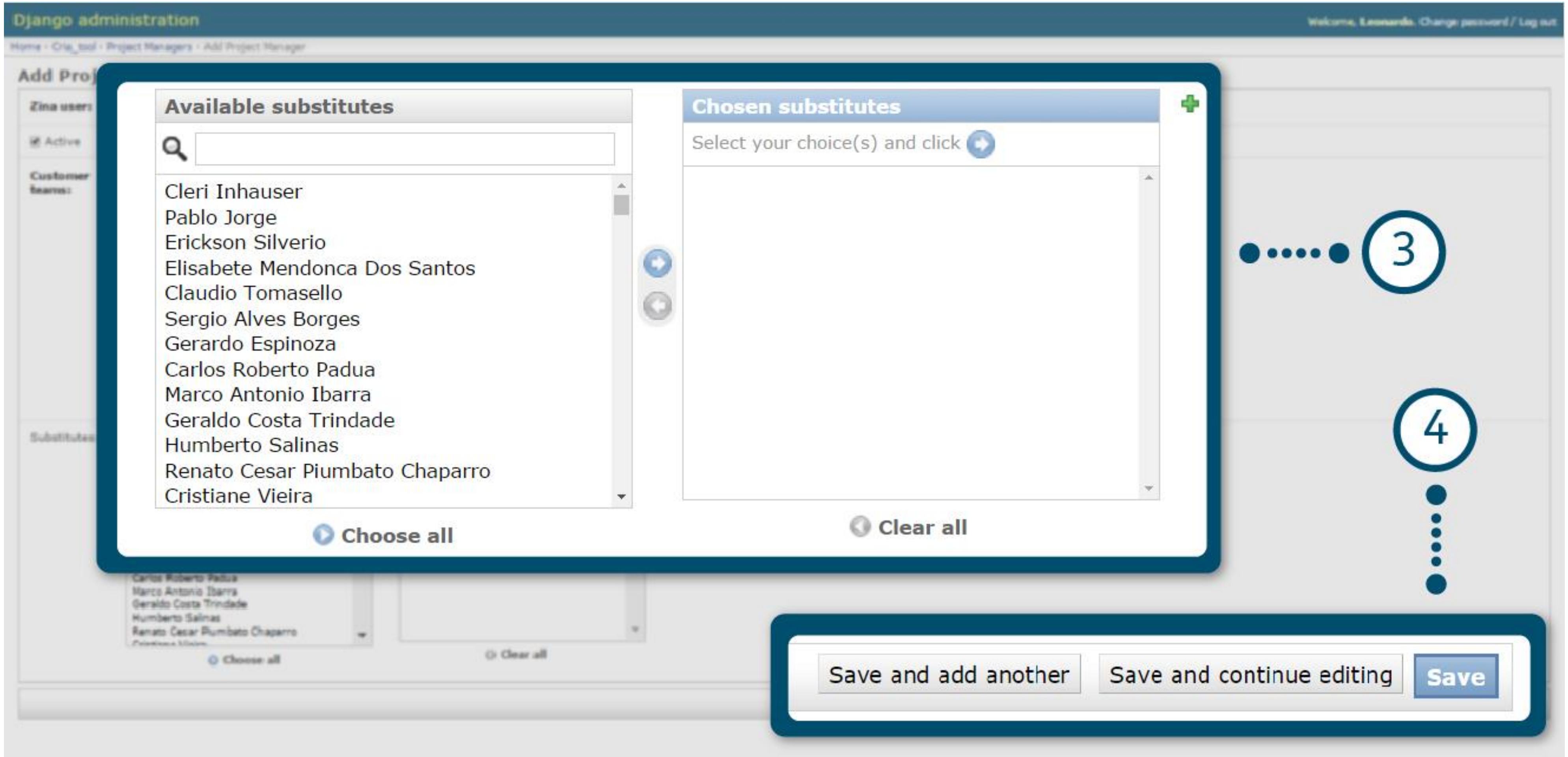
CRIA – Create a new Project Manager

3. For each person defined in 1 and 2, you can select a substitute.
4. Choose the best alternative for saving.



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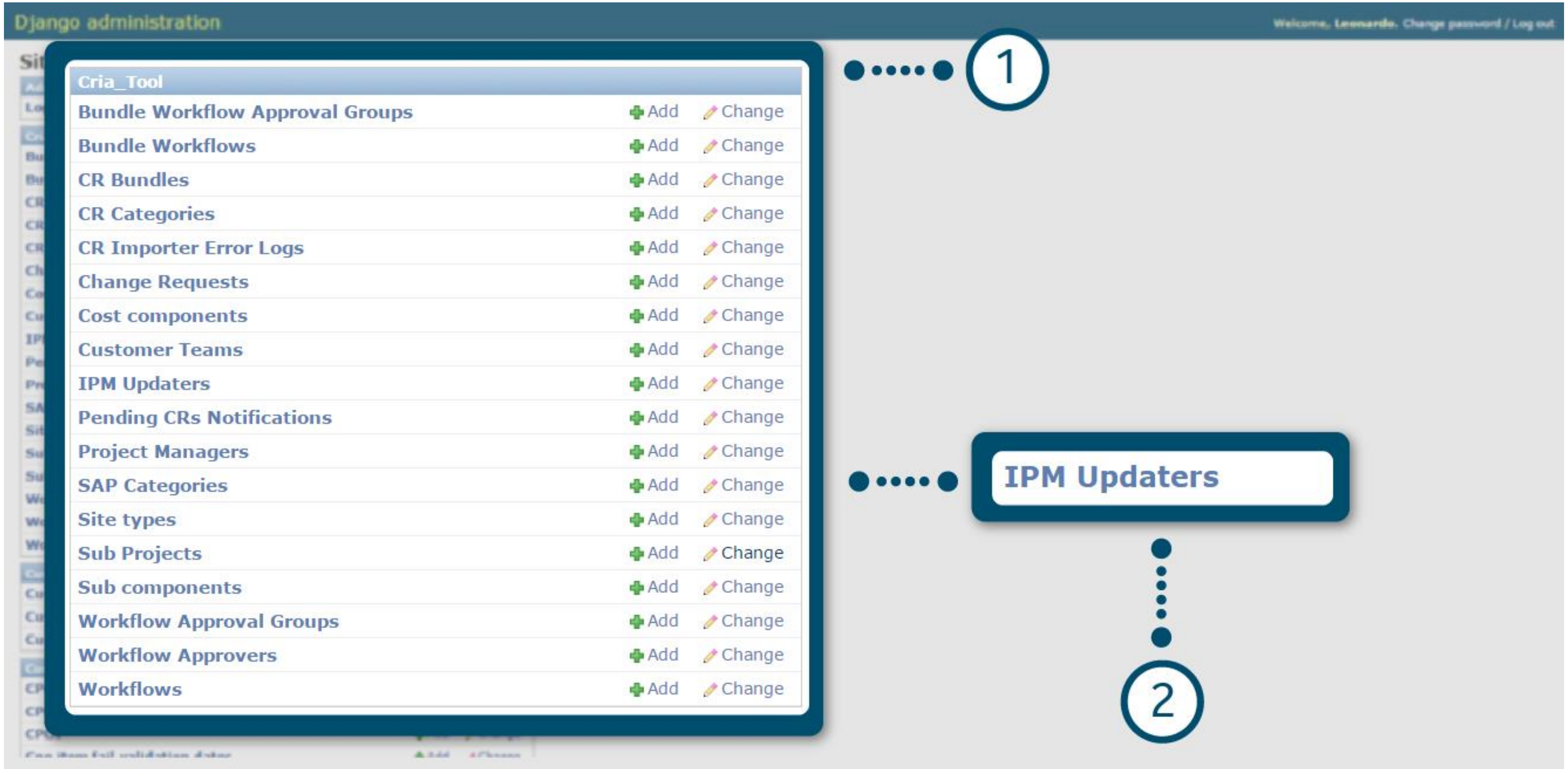
1. In CRIA Tool administration menu.
2. Click on “IPM Updaters” link.

Important: This procedure will allow the definition of the person who will receive a notification after CR is approved.
This person is responsible for updating IPM with approval information.



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CRIA – Create a new IPM “updater”

1. You can delete any IPM updater with the **“Action”** option.
2. You can Click on an existent name to modify its definitions.
3. Click on **“Add IPM Updater”** to add a new.

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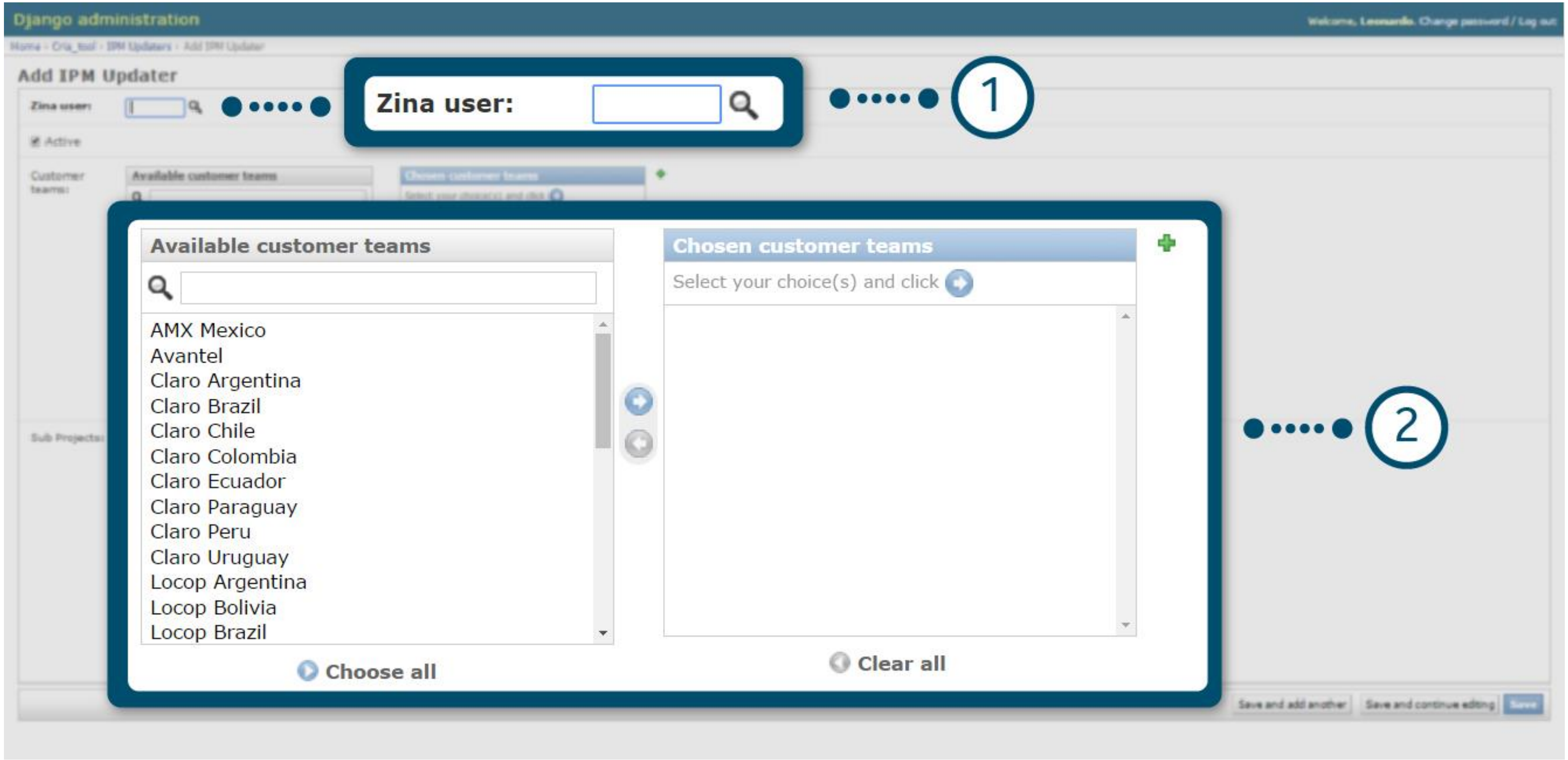
1. Provide a valid Zina user.
2. Pick up the customer teams that the person will have rights to access.



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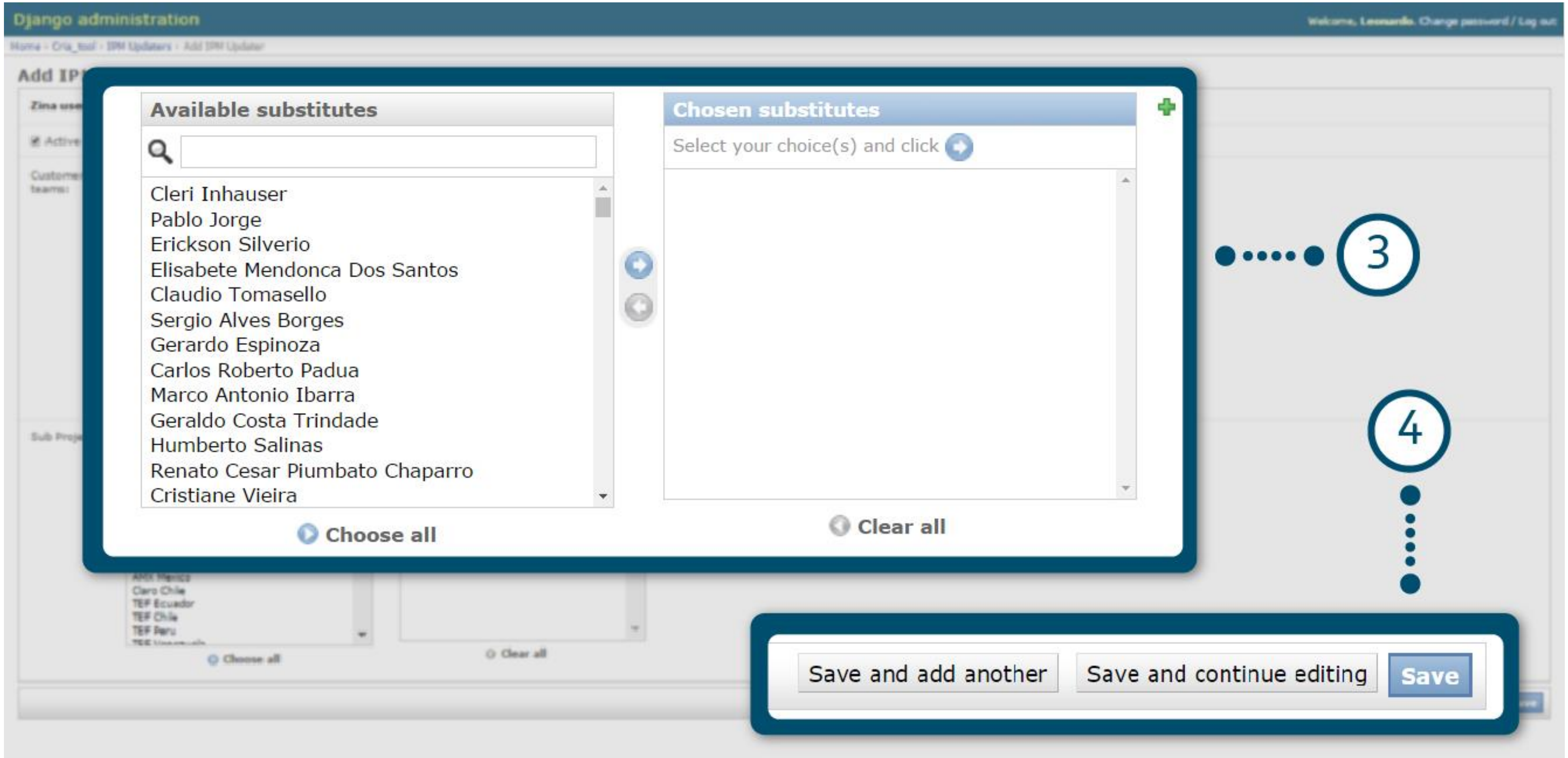
3. Select the sub-projects that the user will have access.
4. Choose the best alternative for saving.



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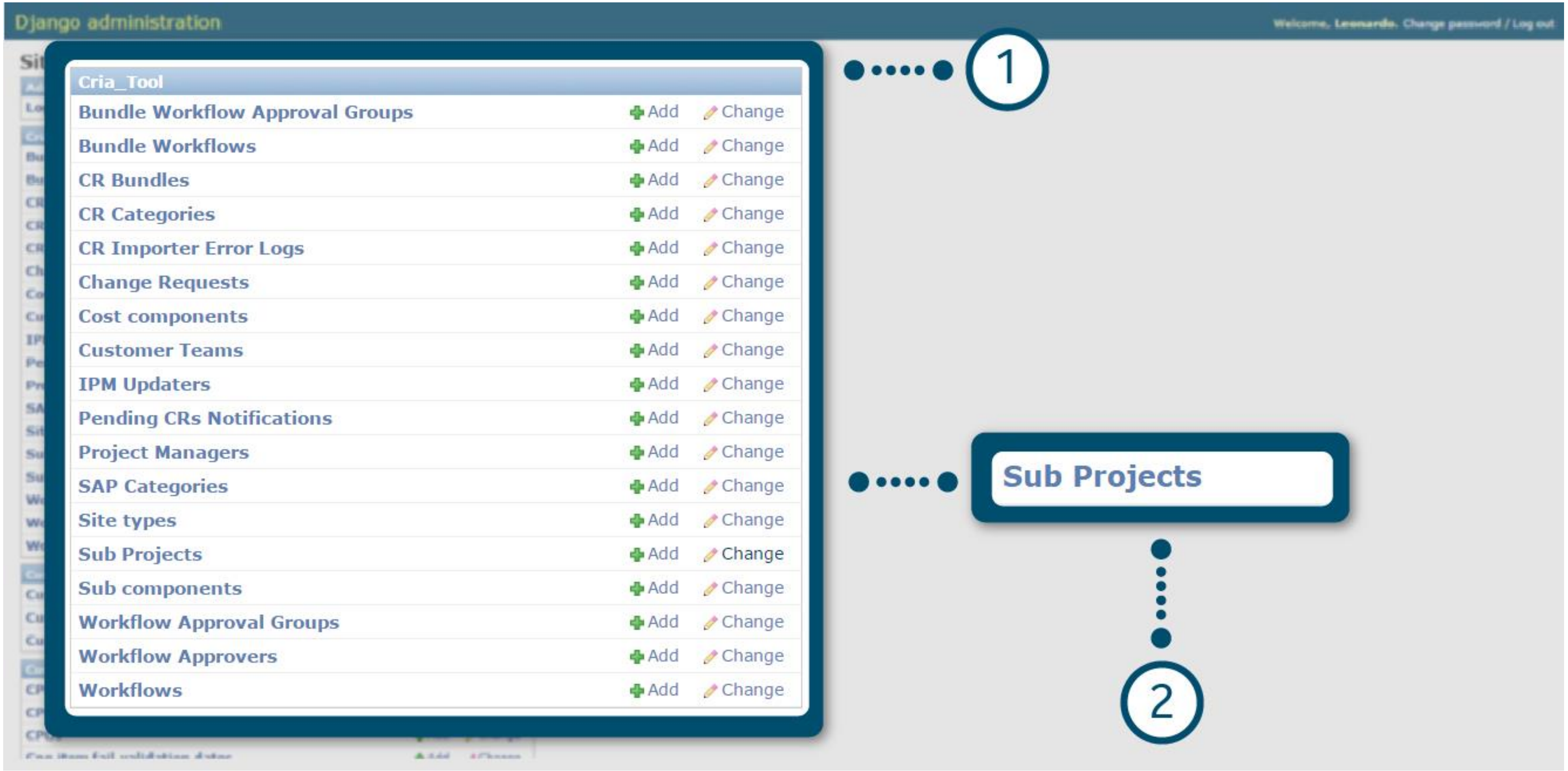
CRIA – Create a new Sub-Project

1. In CRIA Tool administration menu.
2. Click on **“Sub Projects”** link.

Important: Creating a sub-project is a functionality in CRIA to improve the controls and financial disclosure that other tool did not allow before. It’s up to the CT Key User to set up different sub-projects (according to the need) or just keep one “dummy” sub-project set up.



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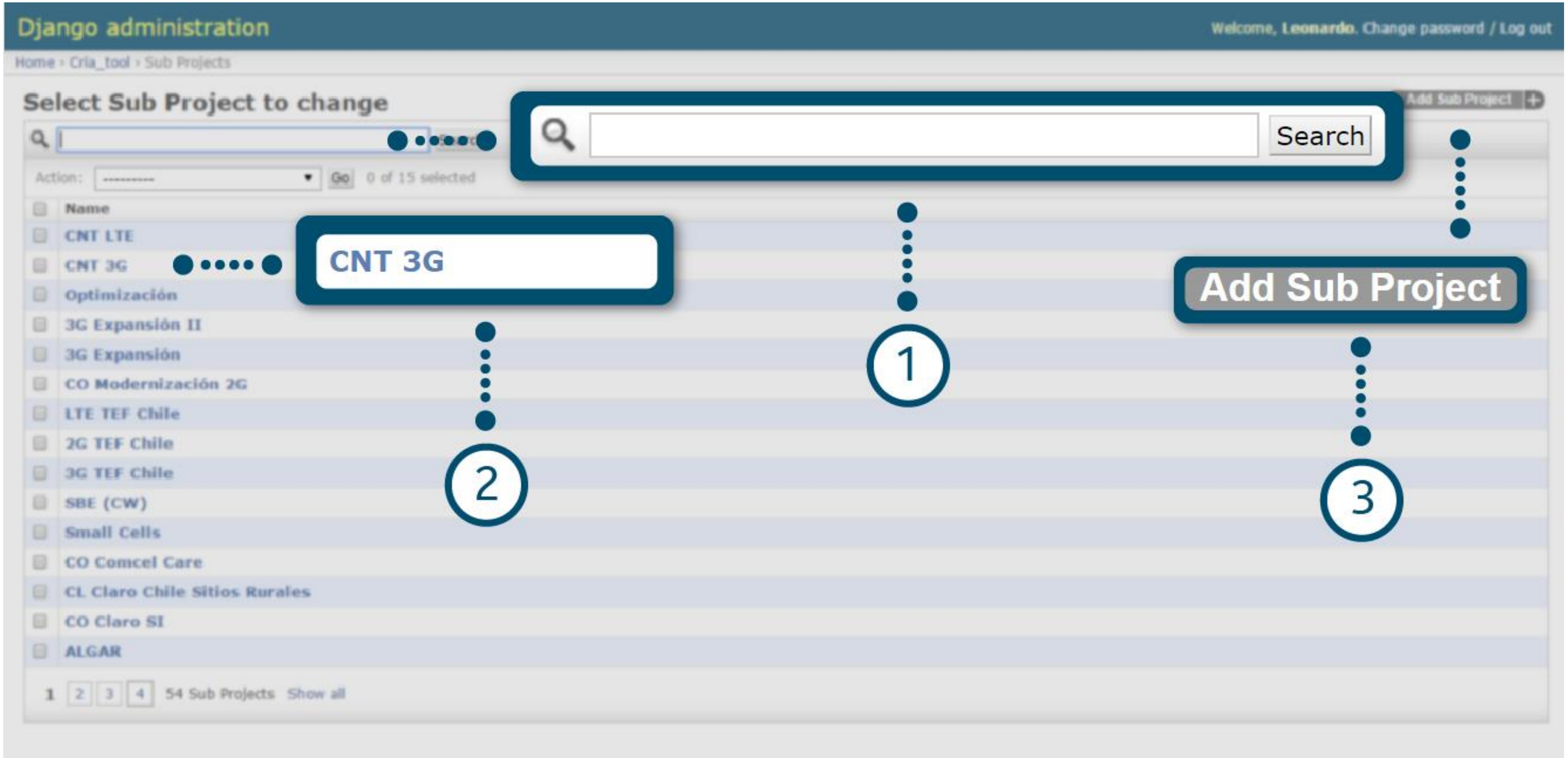
1. You can search for a Sub-Project. The list of all available CT has updated automatically.
2. Click on an existent name to modify its fields.
3. Click on **“Add Sub Project”** to add a new.



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1. Insert sub project name.
2. Define Customer team (available in the pre defined list)
3. Insert Cost Baseline in Euros (if available for the specific WBS). This field is OPTIONAL.
4. Choose the best alternative for saving.

Sub project will be selectable by end user only when there are 2 or more in a CT.

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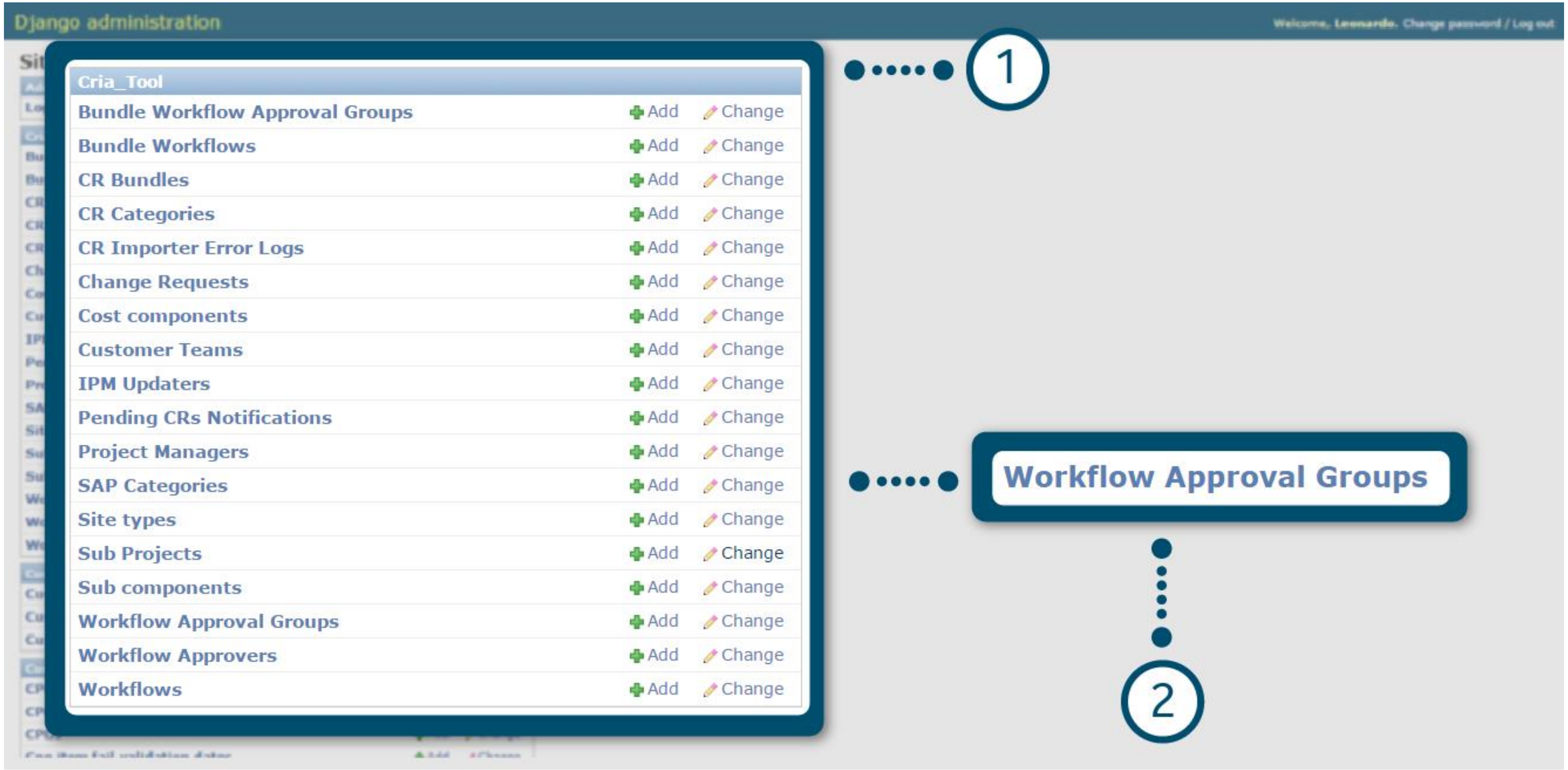
1. In CRIA Tool administration menu.
2. Click on “Workflow Approval Groups” link.



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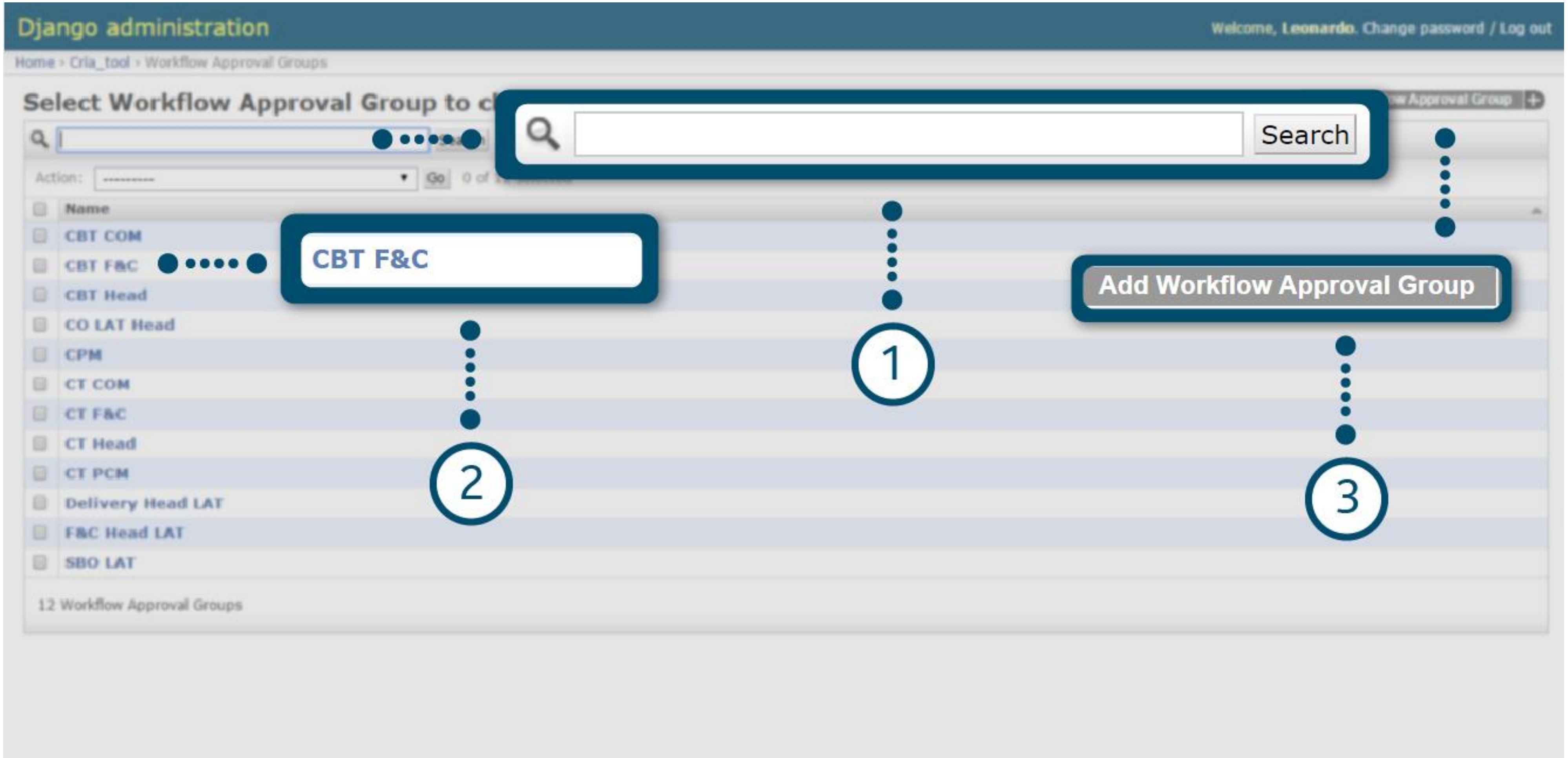
1. You can search for a workflow Approval Group.
2. You can click on an existent group to modify its definitions.
3. Click on **"Add Workflow Approval Group"** to create a new.



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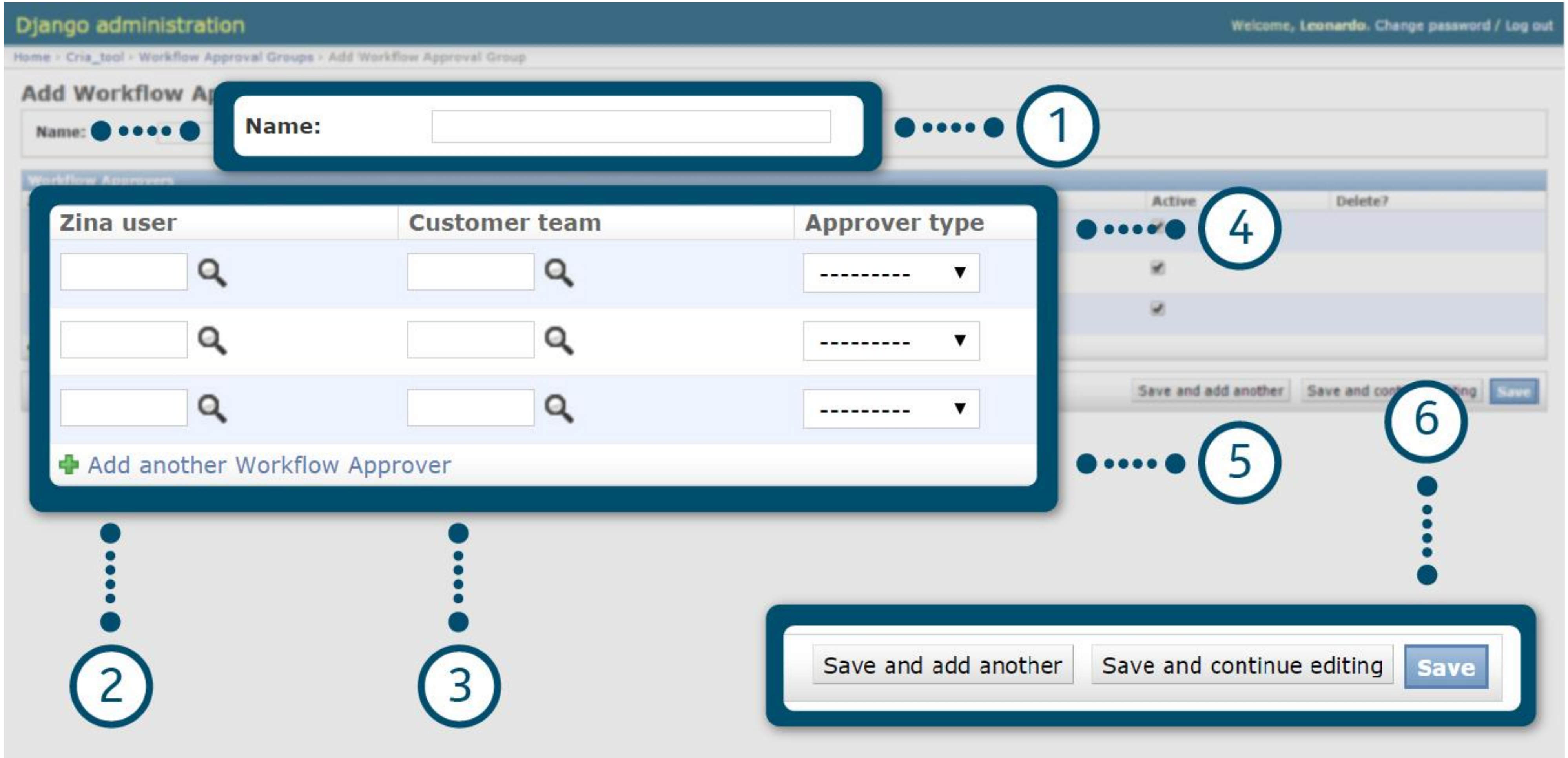
1. Insert name for new group.
2. Insert Zina user ID or use the search engine to find a user.
3. Define Customer Team- (it's a number that refers to a CT in the pre defined list)
4. Approved type can be: Primary (just one) or Substitute (as many as needed)
5. Add a new line to define a new approver.
6. Choose the best alternative for saving.



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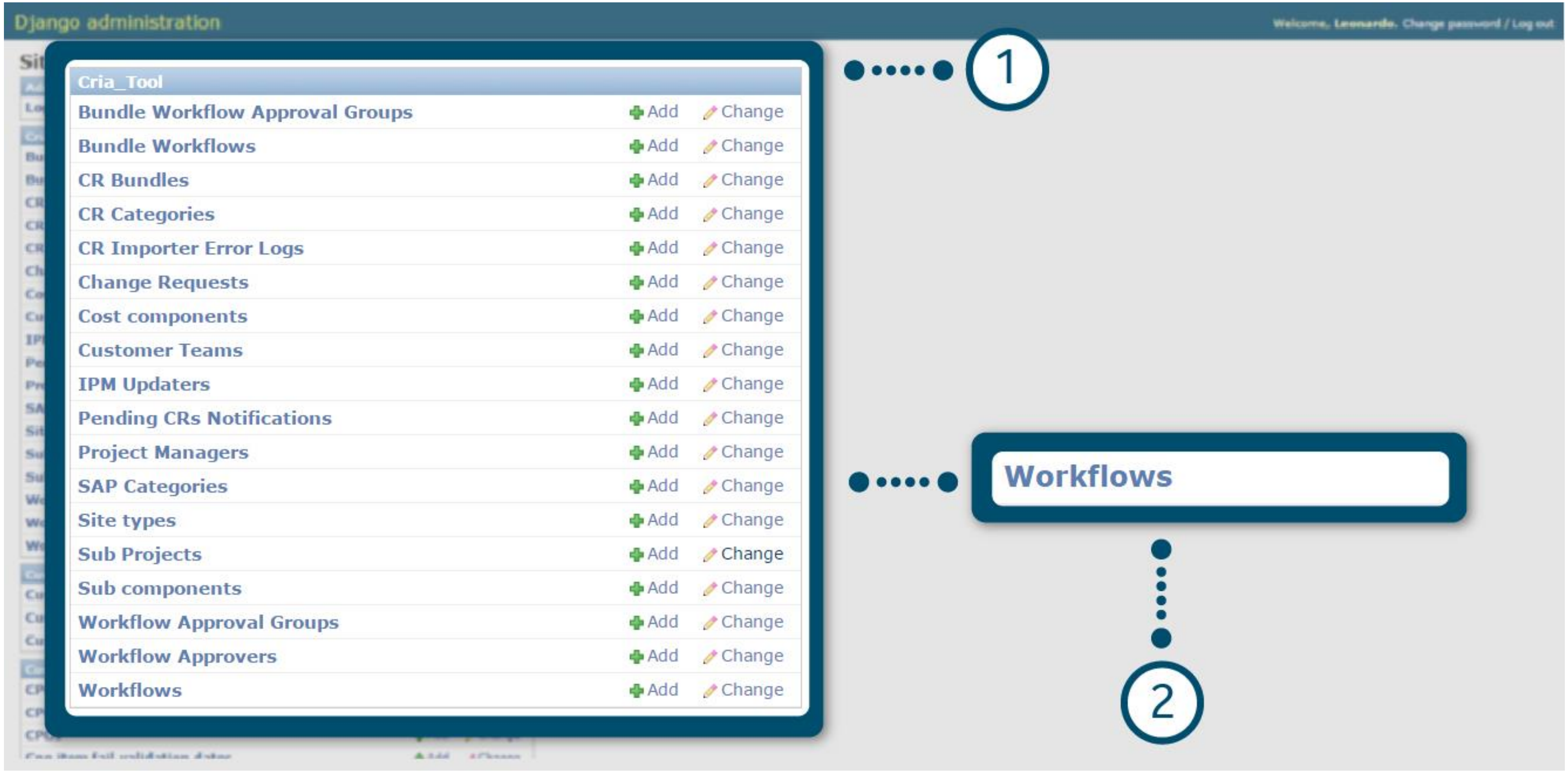
1. In CRIA Tool administration menu.
2. Click on "Workflow" link.



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1. You can search for a workflow.
2. You can click on an existent group to modify its definitions.
3. Click on **“Add Workflow”** to create a new.

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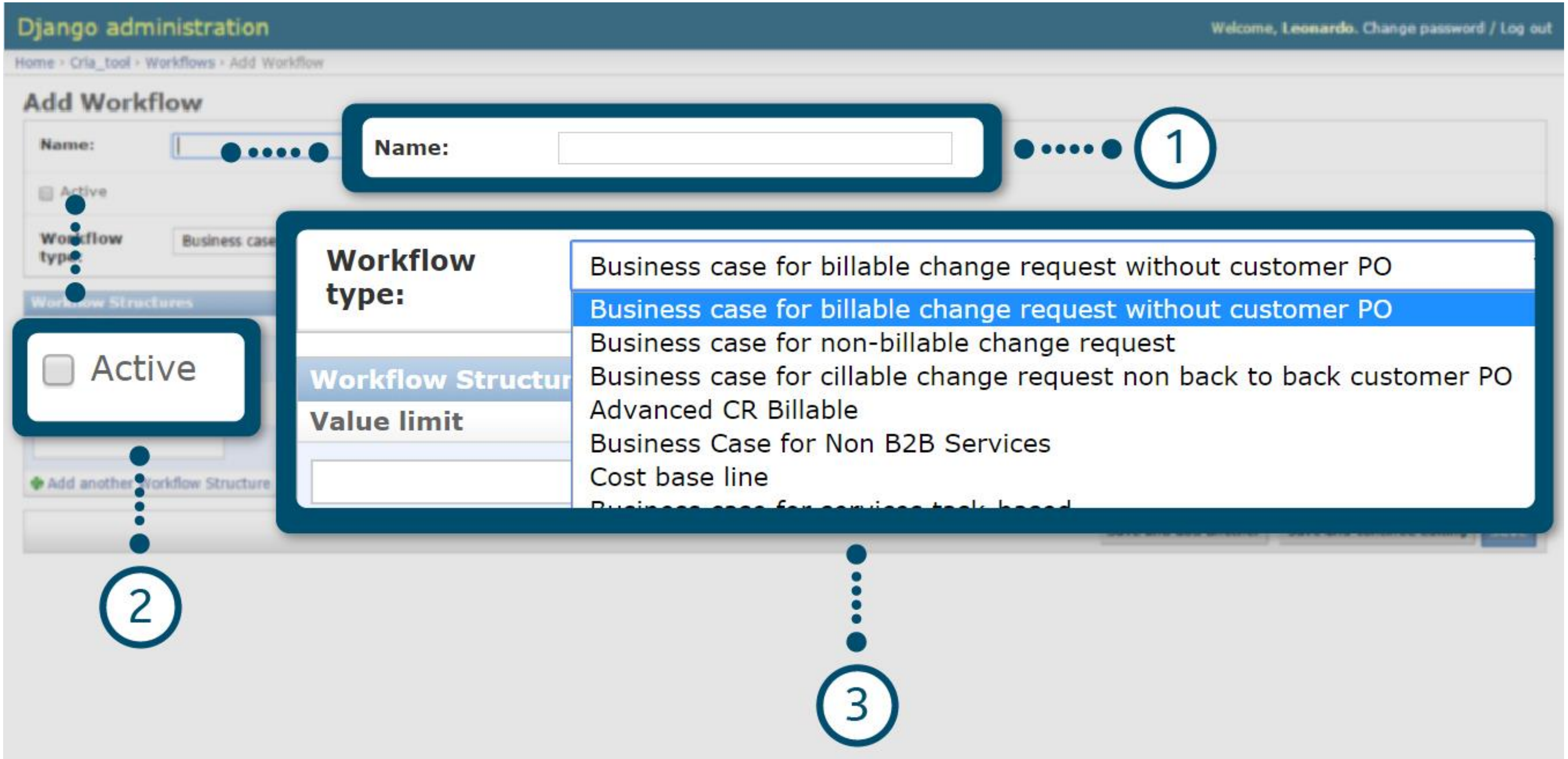
1. Define name for a new workflow.
2. There are 4 types of workflows (associated to the 4 types of business cases) currently available.
3. It is possible to make just one active workflow for each type. However, it's possible to plan new workflows and leave them inactive in the tool.



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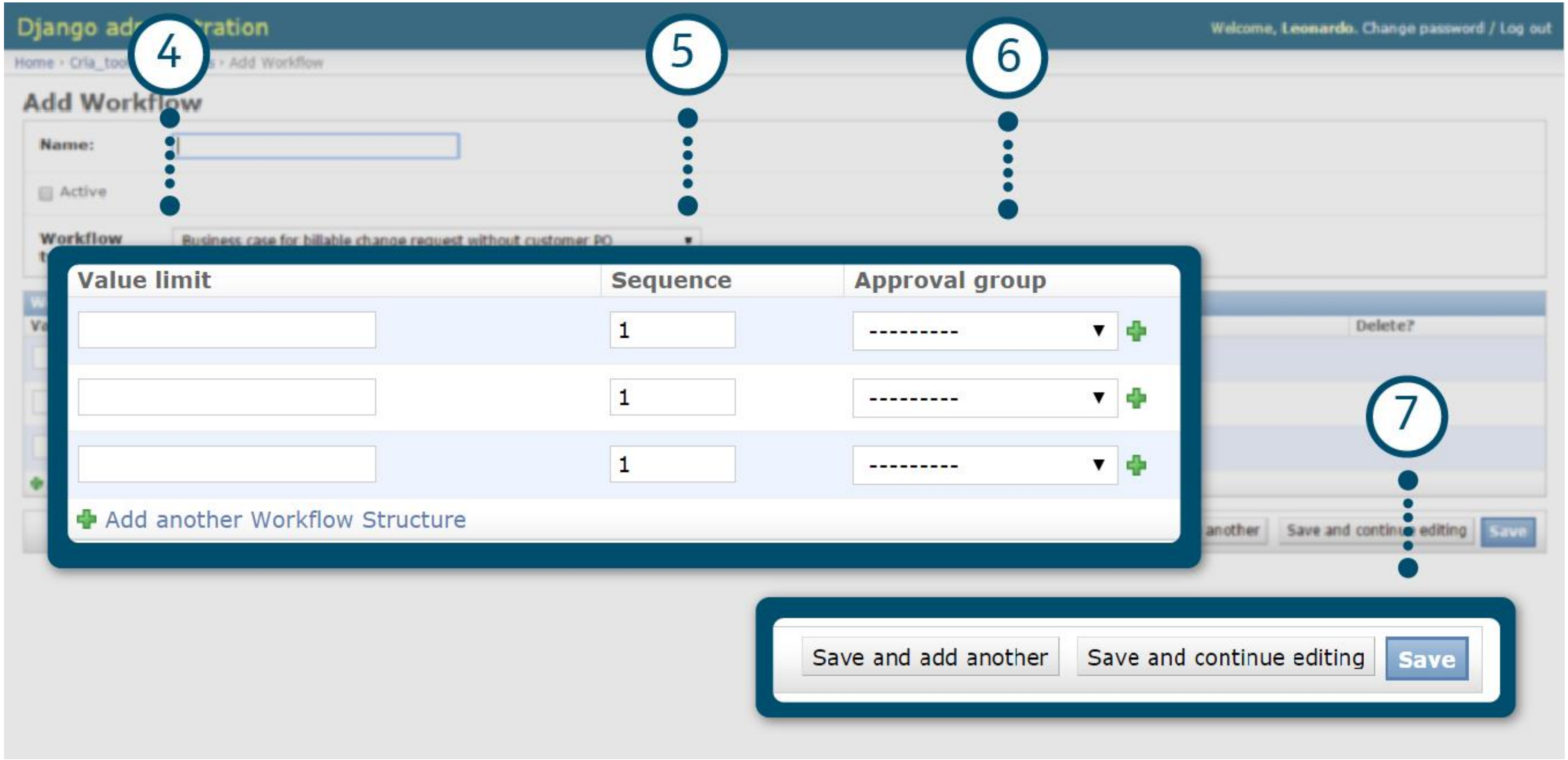
4. The next approval level must be defined in this field.
5. In “Value limit” it is defined the minimum amount in Euros that this level of approval will be assigned to approve.
6. In “Sequence” index it is defined the relative position of the approval group inside the whole approval chain.
7. Select the best alternative for saving.



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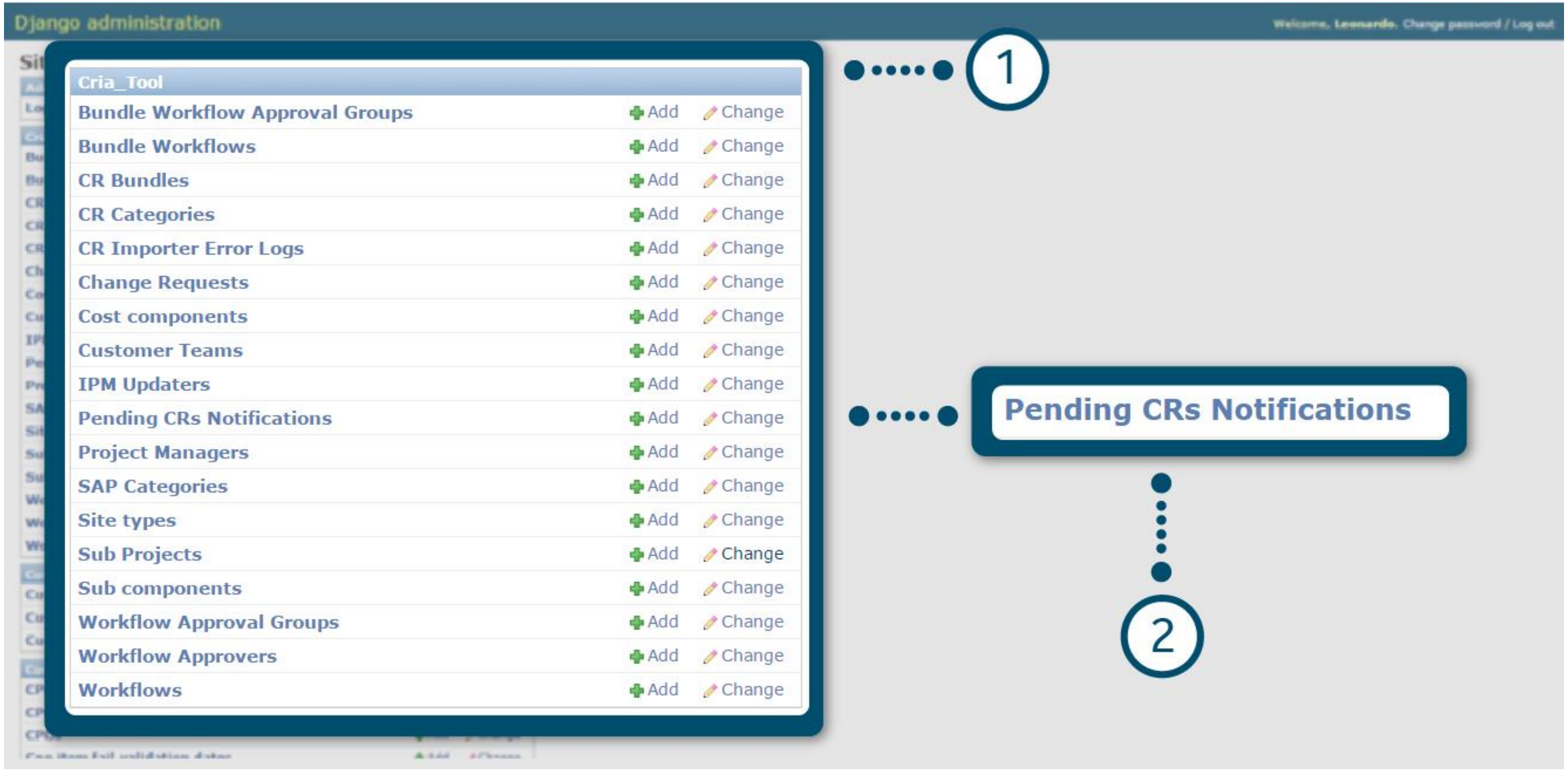
1. In CRIA Tool administration menu.
2. Click on “Pending CRs Notifications” link.

Important: This procedure will define who, and what periodicity, should be informed when a CR approval request is pending for more than X days. Tool is already configured to have CT CM, CBT CM and CM Head receiving governance emails.



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1. You can delete any Pending CRs notification with the **“Action”** option.
2. It is possible to change configuration settings of an already defined warning group.
3. It is possible to create a new group to receive warning emails.

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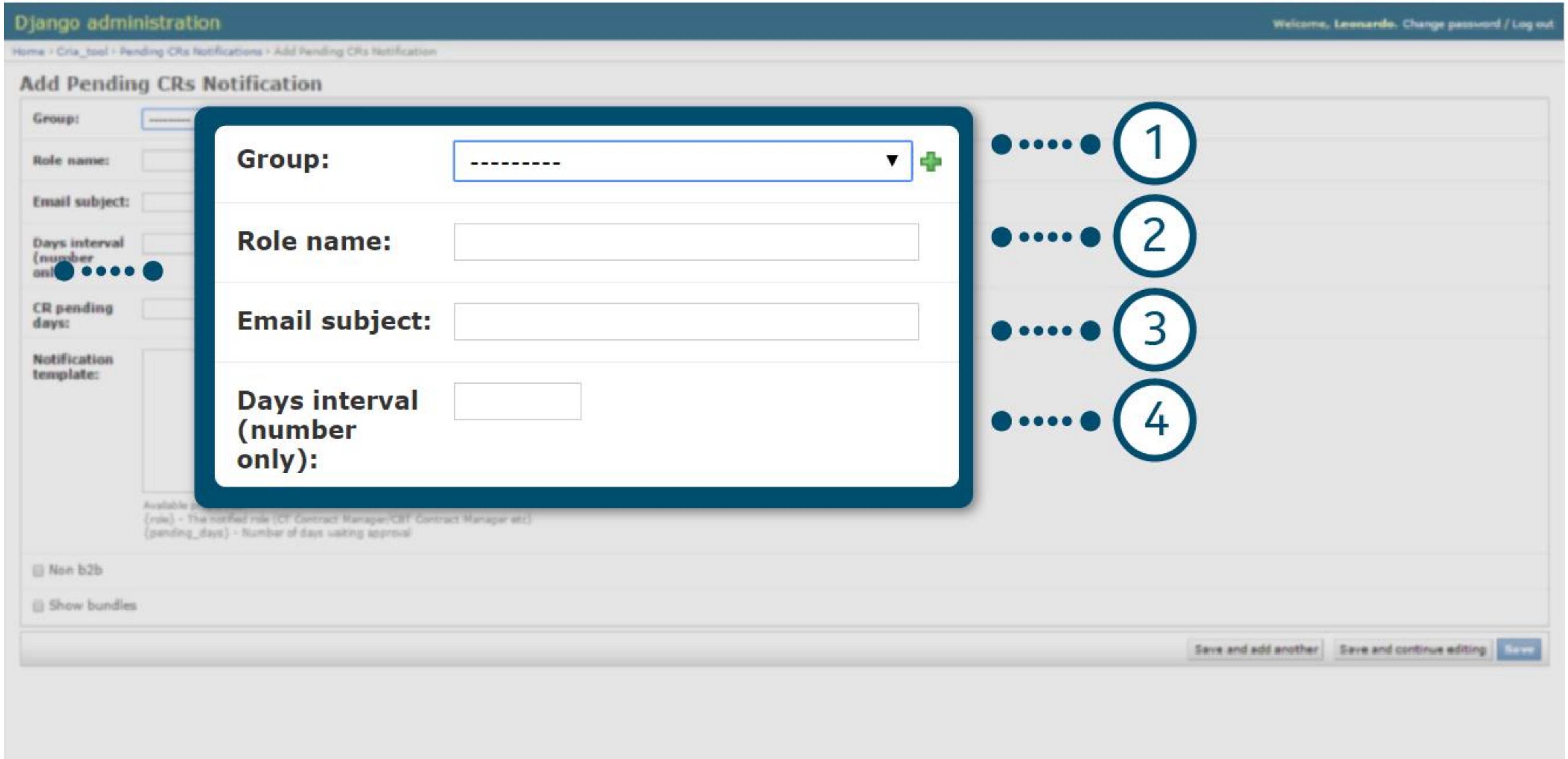
1. Pickup a group from a pre defined list.
2. Identify the role/responsibilities of the group.
3. Define email subject.
4. Define the elapsed time (in days) that this group will receive warning email.



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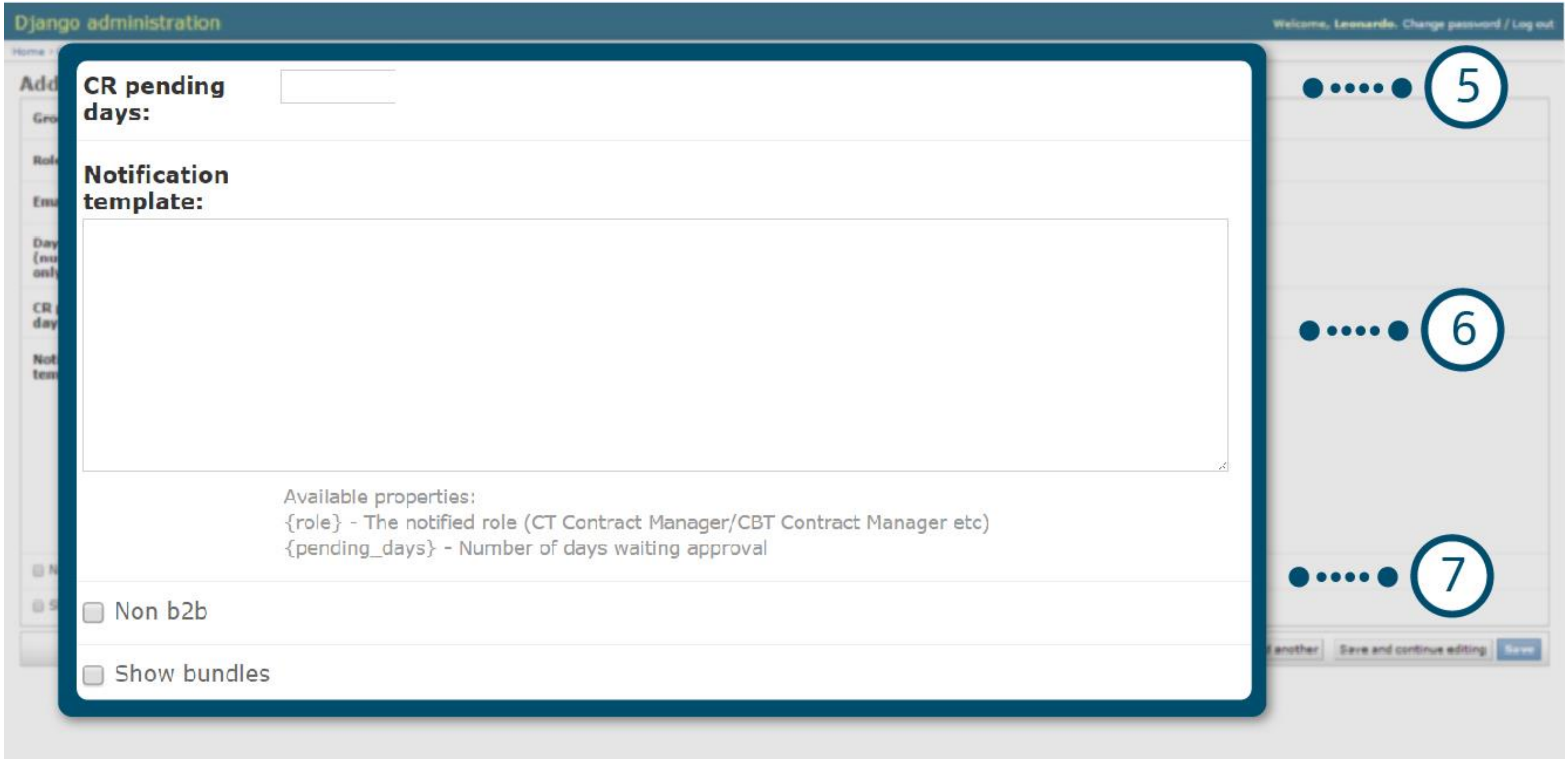
CRIA – Setup Governance emails

5. Define the pending time minimum to start the first warning email.
6. Complete the Notification template comment box.
7. Check Non B2B and Show bundles if there options are necessary.



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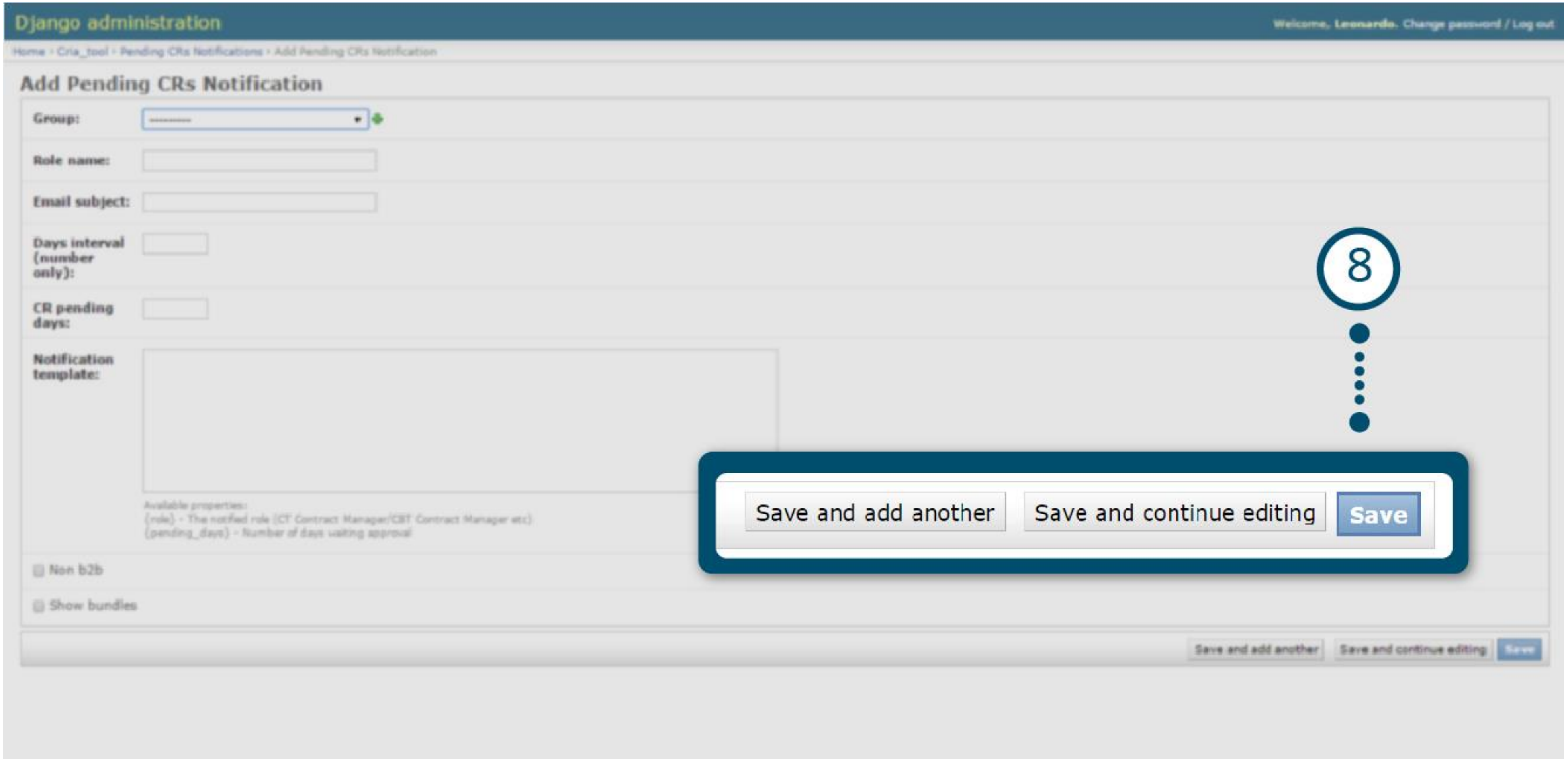
8. Select the best alternative for saving.



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1. What is a CR Bundle?

Bundle is a set of CR’s that will be approved all together at once. In CRIA we have possibility to create two types of bundle:

- **Pre-associated Bundle CR** – in this bundle, we already know all Change Requests that must be included in the package before send bundle request for approval (CT TIM Brazil is the only team using this feature at this moment)
- **Post-associated Bundle CR** – in this bundle, we request a Bundle cost amount approval previously to the definition of Change Requests. We will have a pre-approved budget and we will control budget expenditure by including individual CR’s costs.

2. In CRIA, the setup of workflows and approval groups for bundles is totally independent of the setup for individual CRs.

Attention: Bundles ARE NOT created in the Administrative part. They will be created in the USER interface. (please refer to User Guide)

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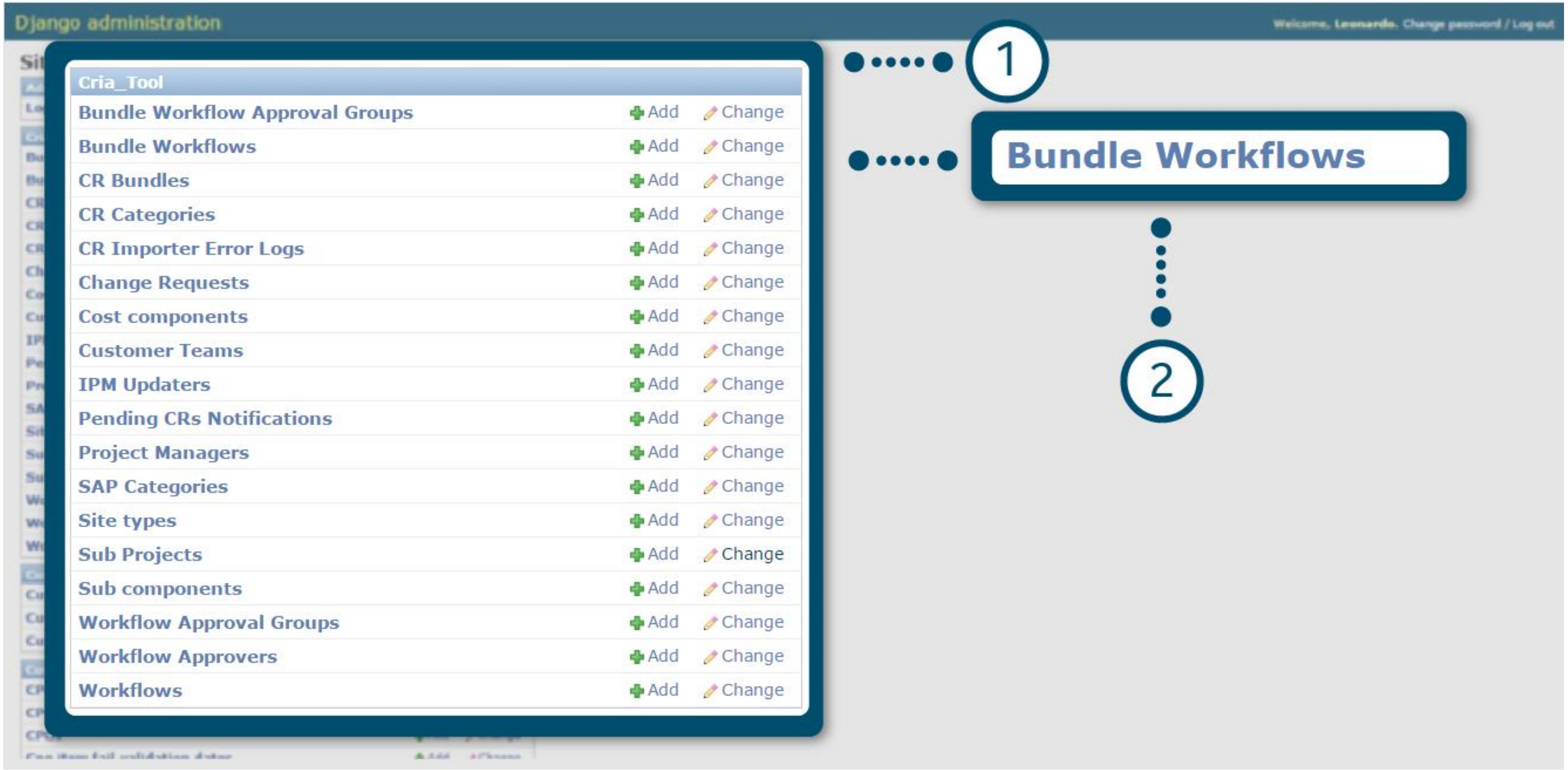
1. In CRIA Tool administration menu.
2. Click on **“Bundle Workflow”** link.



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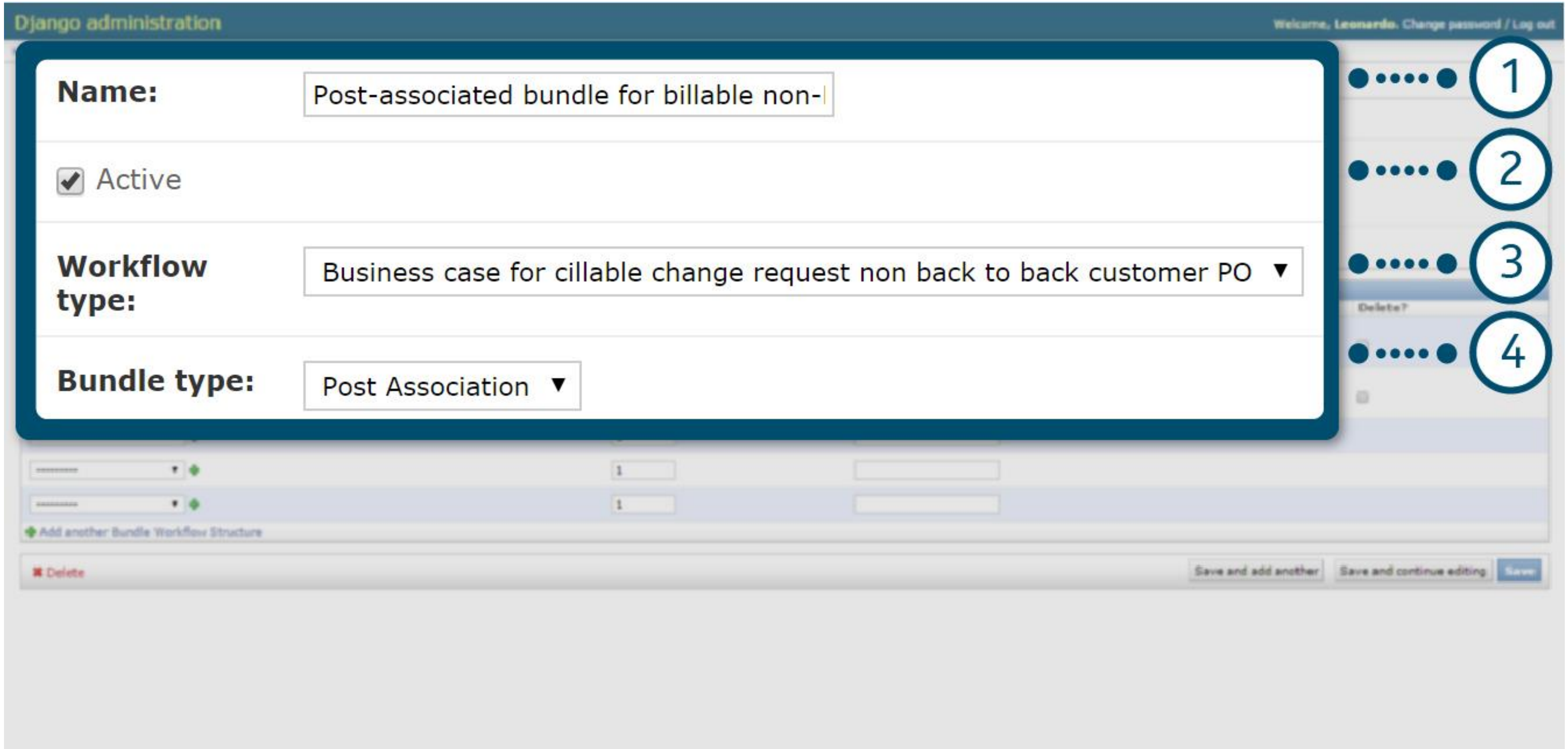
CRIA – Create a new Bundle Workflow

1. You can search for a Bundle Workflow.
2. You can click on an existent group to modify its definitions. There are 6 different flow already defined for pre-associated and post-associated bundles, depending on the nature of the CR's that will belong to the bundle. Bundle feature in CRIA assumes that all CRs in a bundle have the same CR SAP Category.
3. Click on **"Add Bundle Workflow"** to create a new.

You can change an existent bundle workflow or create a new one.

1. Edit bundle name.
2. Check box to activate workflow (you can create as many inactive flows, but only one active pre and post per kind of CR workflow type)
3. Select workflow type. (business case type)
4. Select bundle type.



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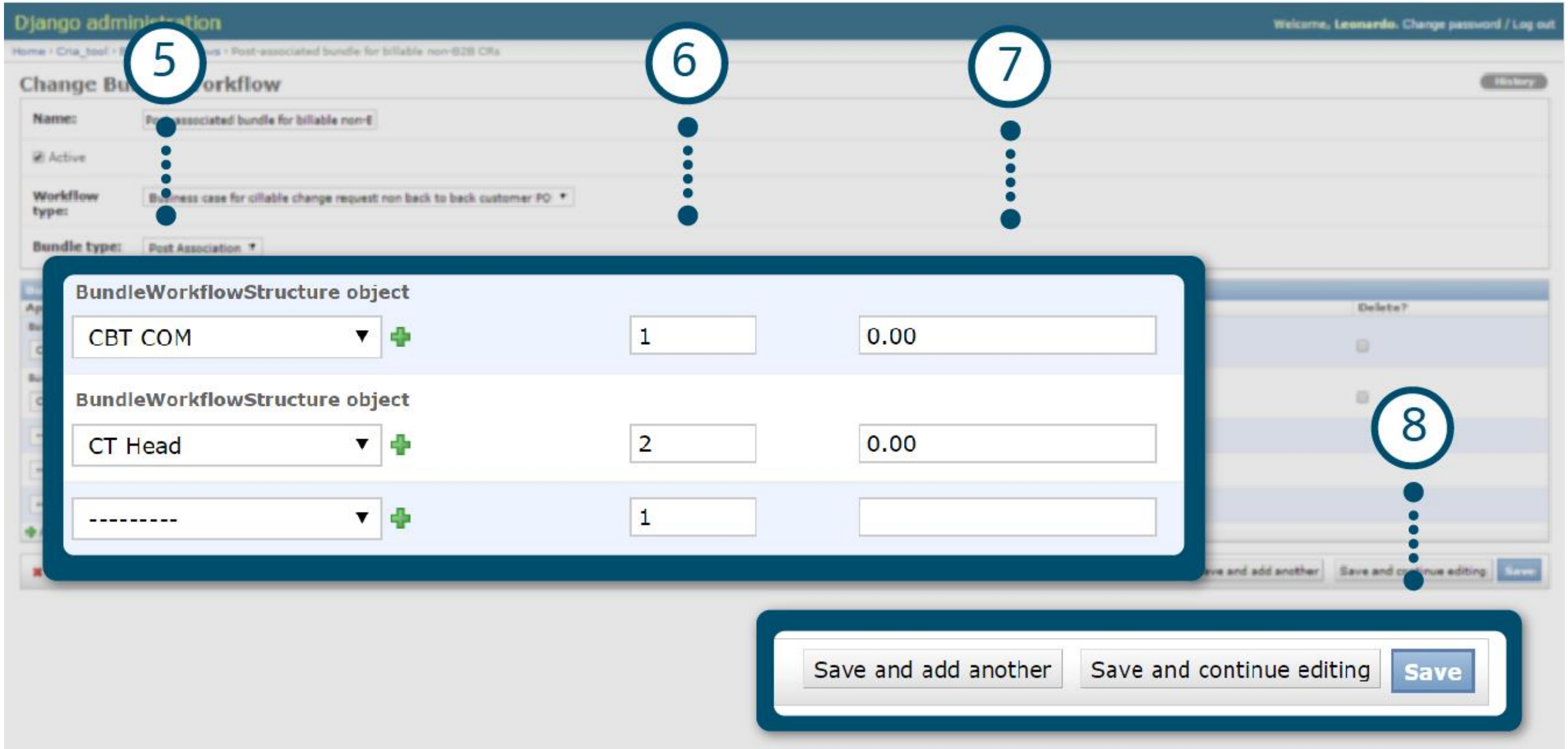
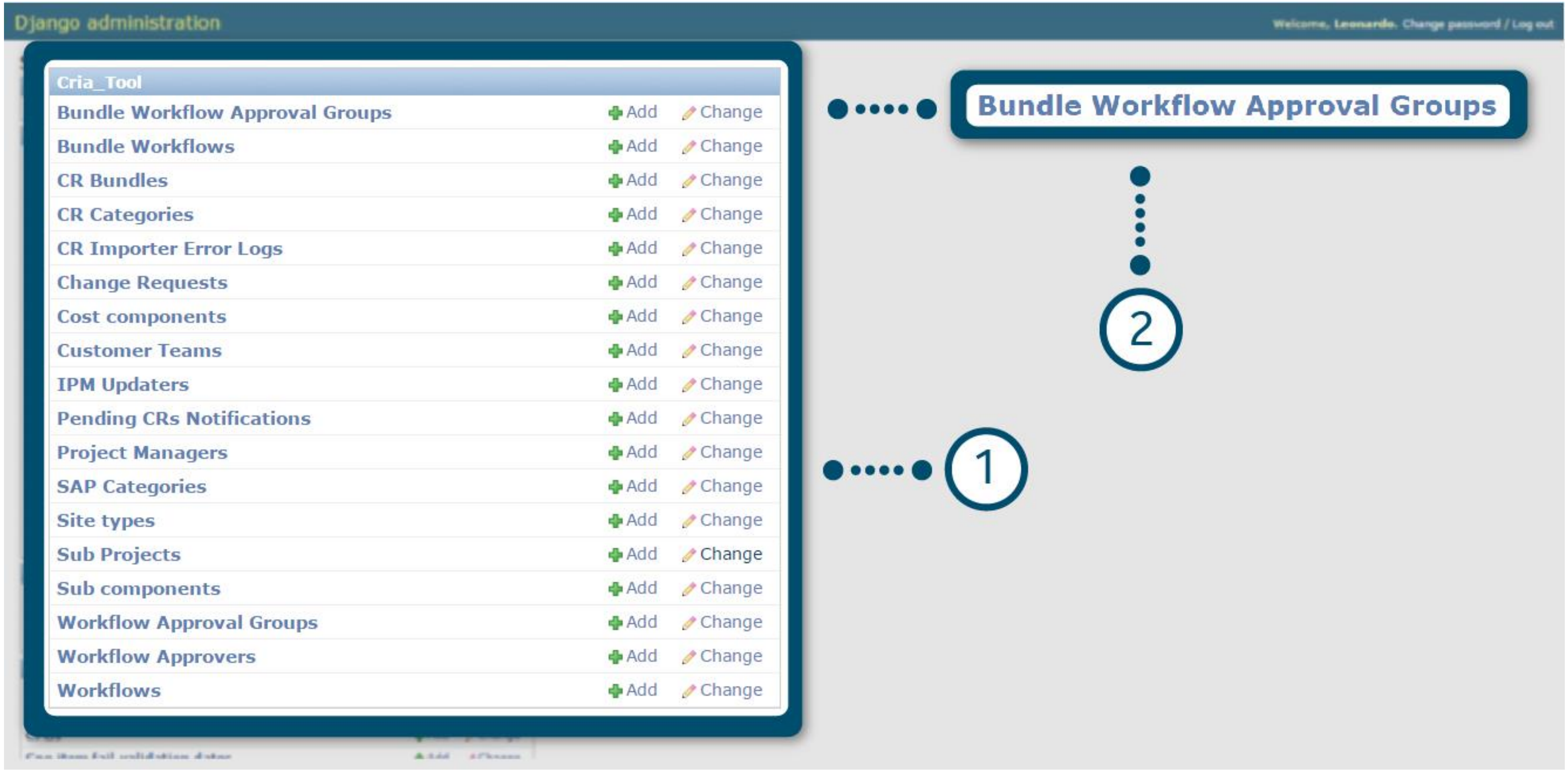
5. Indicate approval group for the approval chain.
6. Indicate the level of approval in the chain sequence.
7. Indicate minimum amount of cost this approval group must be involved in.
8. Select the best alternative for saving.



CRIA – Create a new Bundle Workflow Approval Group

1. In CRIA Tool administration menu.
2. Click on **“Bundle Workflow Approval Groups”** link.

The further steps for groups creation is totally similar to the sequence presented in slides 26, 27 and 28.



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SoR for CRIA tool users

User Profile	CRIA profile	Initial Setup of CRIA per CT/CBT	Provide support material for training Key/End users	Support on outages and during unexpected tool behavior identified by end-users	Keep updated setup of users and approvers per CT / CBT	Input CR information correctly in IPM	Review CR information before approval flow starts	Provide clear information to CR owner when return CR to IPM is needed	Define and request substitutes when primary approver not able to access the tool	Update approvers status (active/inactive) and add new substitutes	Approve / Reject CR's with clear justifications when needed	Report deviations in LoA to be adjusted in the process and implemented in the tool	Update IPM with the final CR status (Approved/Rejected)	Request clean up of database (total or partial) in CRIA Tool	Execute clean up of database (total or partial) in CRIA Tool
CRIA tech support	Key-user	X	X	X											X
Project delivery resources	End-user					X						X			
Project Managers	End-user					X	X					X			
Contract Managers	End-user						X	X				X			
CT Contract Managers	Key-user				X			X				X			
CBT Contract Managers	Key-user				X			X	X	X		X		X	
LoA approvers	End-user							X	X		X	X			
IPM updaters	End-user											X	X		

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If you need any further assistance, user management and support, please get in touch with our team at support.zina@nokia.com.

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