

## Request → Evaluate → Approve → Project → Deliver

### 1 Submit a Request

Portfolio → Requests → + New Request

Field	What to enter	Example
Name	Clear, concise title	CRM Migration
Purpose	What problem does this solve?	Replace legacy system
Source	Where it came from	Sales department
Category	Type of initiative	New Application
Requestor	Who is asking	Jane Doe
Target Date	When is this needed?	2026-06-01

💡 Keep it lean — attachments, detailed descriptions, and links can come later. The goal is to get the request into the pipeline so it can be evaluated.

### 2 Evaluate & Score

Open request → **Evaluation** section

#### Value Scoring (weighted)

Strategic Alignment · Business Value · Urgency · Risk of Inaction · Dependencies — each scored on a weighted scale. KANAP calculates a total for objective comparison.

#### Feasibility (7 dimensions)

Technical · Resources · Budget · Timeline · Org Readiness · Risk · Vendor/External — each rated to paint a realistic picture of delivery confidence.

**Analysis Recommendation:** 2–4 sentence narrative capturing the committee's verdict.

⚠️ **Don't score alone.** Committee: IT Functional + IT Technical + Cybersecurity + Business. One person's score = opinion. A committee's score = decision framework.

### 3 Approve & Convert

- Review scores, feasibility analysis, and recommendation
- Set status: **Approved**, Rejected (with reason), or Deferred
- Click **Convert to Project** — all data carries over automatically

💡 Transparent scoring means you can answer "why was my request rejected?" with data, not opinions.

### 4 Set Up the Project

Open project from **Portfolio → Projects**

#### Team (Team tab)

Role	Purpose
Sponsor	Accountable for outcomes, removes blockers
IT Lead	Drives IT delivery
Business Lead	Drives business readiness & adoption
Contributors	IT and Business team members doing the work

⚠️ Contributors must be set up in **Portfolio → Contributors** with team, availability (days/month), and skills. Without this, capacity planning and roadmap generation won't work.

**Progress tab:** IT Effort (MD) + Business Effort (MD) → feeds the roadmap generator.

**Timeline tab:** Apply a Phase Template for instant scaffolding, or set dates manually.

### 5 Track Execution

#### Progress & Status

- Execution Progress** slider (0–100%) on Progress tab
- Statuses: In Progress → In Testing → Done (also: On Hold, Cancelled)

#### Time Logging

**Progress tab** (overhead) + **Tasks** (task-specific time).

⚠️ **Time logging powers the roadmap.** Logged time → historical capacity → accurate scheduling. Without it, you're guessing. Log weekly, even rough entries.

### 6 Structure (Advanced)

**Phases** — logical stages (Analysis, Dev, Test, Deploy). Use templates or create manually.

**Tasks** — assignable work items with priority, due date, time logging.

**Milestones** — key checkpoints visible on timeline and reports.

💡 Start simple. Add structure only when the project needs it.

### The Bigger Picture

**Automatic Roadmap** — Effort estimates + contributor availability + historical time data = auto-scheduled project timeline. No more manual Gantt charts.

**Capacity Heatmaps** — See who's overloaded and who has bandwidth, across teams and time periods. Prevents the "5 projects at 100%" trap.

**Bottleneck Analysis** — When projects compete for the same people or skills, KANAP highlights it before it becomes a crisis.

**Executive Reporting** — Scores, status, progress, budget, and timeline roll up into portfolio-level dashboards. No PowerPoint needed.

### Quick Reference

I want to...	Go to...
Submit a new idea	Portfolio → Requests → + New
Score a request	Open request → Evaluation section
See the project pipeline	Portfolio → Planning
Check team capacity	Portfolio → Planning → Capacity view
Log time on a project	Open project → Progress tab or Tasks
Generate a roadmap	Portfolio → Planning → Generate
View reports	Portfolio → Reporting
Configure scoring weights	Portfolio → Settings
Set up contributors	Portfolio → Contributors