



COMMONWEALTH IT PROJECT MANAGEMENT USING THE COMMONWEALTH TECHNOLOGY PORTFOLIO (CTP)

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VITA Project Management Division

VERSION 6.0

WELCOME

1. This class is required before you are granted access to Commonwealth Technology Portfolio (CTP)
 - A. Why we are here
2. Training schedule
3. Intended Audience
 - A. You have a near-term need for CTP access as a designated Project Manager
 - B. Clarify PMSTS: This class is NOT a required class for Commonwealth Project Manager Qualification
4. Objectives
 - A. Qualify the student to use CTP E1 and receive a user's license.
 - B. Out of Scope

COMMONWEALTH TECHNOLOGY PORTFOLIO: BIG PICTURE

1. CTP = Enterprise-wide repository for IT Investment Management (ITIM)
 - A. IT Investments >\$250,000:
 - i. IT Projects (new IT product or IT service (not O&M))
 - ii. IT Procurements
 - iii. IT Programs (group of interrelated projects)
2. Singular source of truth for scope, timeline and financials
3. Collection of artifacts / evidence that suggests that agencies / PMs followed the Project Management Standard

CTP E1 ORIENTATION

1. ITIM methodology and lifecycle is built into the tool.
2. CTP is used ONLY for Commonwealth governance and oversight purposes...
 - A. NOT for day-to-day planning, execution and tracking progress on your project.
 - B. However... the tool has extensive capabilities!
3. CTP satisfies the documentation, review and approvals for all phases of the IT Investment Management (ITIM) Lifecycle.

ITIM LIFECYCLE: AGENCY ROLES



AGENCY

1. Project Manager (PM)
2. Agency IT Representative (AITR)
3. Business Sponsor (Bus. Spon.)
4. Agency Head / representative (Agcy. Hd.)
5. Secretariat Oversight Committee (SOC)

ITIM LIFECYCLE: GOVERNANCE & OVERSIGHT ROLES



GOVERNANCE & OVERSIGHT

1. Project Management Division Consultant (PMD)
2. Project Management Division Manager (PMD Mgr.)
3. IT Investment Management Division Consultant (ITIMD)
4. Enterprise Architecture (EA)
5. Supply Chain Management (SCM)
6. Enterprise Cloud Oversight Service (ECOS)
7. Commonwealth Security and Risk Management (CSRM)
8. Customer Account Manager (CAM)
9. Secretariat Oversight Committee (SOC)
10. Office of Attorney General (OAG)
11. Commonwealth Chief Information Officer (CIO)

ITIM METHODOLOGY FOR IT PROJECTS (\geq \$250,000)

1. 1.0 Pre-Select

2. 2.0 Select

3. 3.0 Control

A. 3.0 Control: Initiation Phase

B. 3.0 Control: Detailed Planning Phase

C. 3.0 Control: Execution & Control Phase

D. 3.0 Control: Closeout Phase

4. 4.0 Evaluation



PROJECT CATEGORIES: 1 – 4

Project Categories 1 – 4				
		Complexity:		
		High	Med	Low
Risk:	High	1	2	2
	Med	2	3	3
	Low	3	4	4

CTP E1 BASIC NAVIGATION

1. Highlights
2. Login
3. Basic Navigation
 - A. Banner
 - B. Ribbon
 - C. Work View
 - i. Context bar
 - ii. Sub – menu

CTP E1 BASIC NAVIGATION – CONT'D

1. Action Menu
2. Lifecycle
3. My Overview
4. Email Notification
5. Work Menu
6. Portfolio
7. Document Repository

LOG INTO THE TRAINING ENVIRONMENT

1. Open browser: Use Chrome or Edge only - - NOT Internet Explorer!
2. <https://covactp-sb.pvcloud.com/testing/login/body.asp?manual=y>
3. Environment: VITSB1TRAIN5 (aka "TRAIN5")
4. User name: Student01, Student02, Student03,etc.
5. Password: train01 train02 train03 ...etc.
6. ...you *might* be prompted to change the password; if so, you can use a simple password (Password strength does not have to meet CoVa standards for the Training Environment.)

CTP E1 NAVIGATION: BANNER / MY OVERVIEW

- Banner: colored bar at top of screen; contains menu items; light underline indicates active menu item.
- My Overview is “all about you”

Banner

Ribbon

Active Menu Item

Active Tile

Tiles

Search

My Account

1

Active Lifecycle Step

My Scheduled Assignments

MY24 - My Assignments

Users-Roles-LC Roles

My Action Items

My Active Change Requests

My Active Issues

My Active Risks

Next PGR Number to use

more ...

Analyze

My Active Lifecycle Steps

Status	Lifecycle Step	Entity	Type	View Lifecycle	User Responsible	Lifecycle Role	Activated On	Rejected Step	Escalated Step	Hover for Help Text
✓	Enter Procurement Governance Request Pre-Recommendation - PMD	General Provider Auditing Services - Procurement	Work		Pat Reynolds	PMD Consultant	4/9/2021 7:07:17 AM			

RPM Tile: T105 - My Planview > Active Lifecycle Steps

Lifecycle Step

Entity

View Lifecycle

EMAIL NOTIFICATION

Hi All, Attached are the slides from my presentation on the new security items to

noreply@pvcloud.com



A Work Lifecycle Item requires your attention - Planview Enterprise One - Portfolio and Resourc...

8/24/2022

24 AUG 2022

EMAIL NOTIFICATION

You are receiving this email because a Work Lifecycle Item requires your attention:

You may directly access the Lifecycle Item, its related Work, or a diagram of the Lifecycle by clicking on the View Lifecycle Item, View Work or View Lifecycle buttons below.

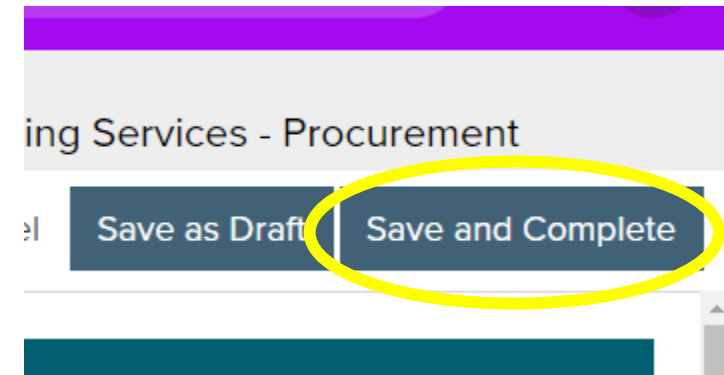
Lifecycle Item: Enter Procurement Governance Request Pre-Recommendation - PMD [View](#)

Work Details: General Provider Auditing Services - Procurement [View](#)

Lifecycle Diagram: General Provider Auditing Services - Procurement [View](#)

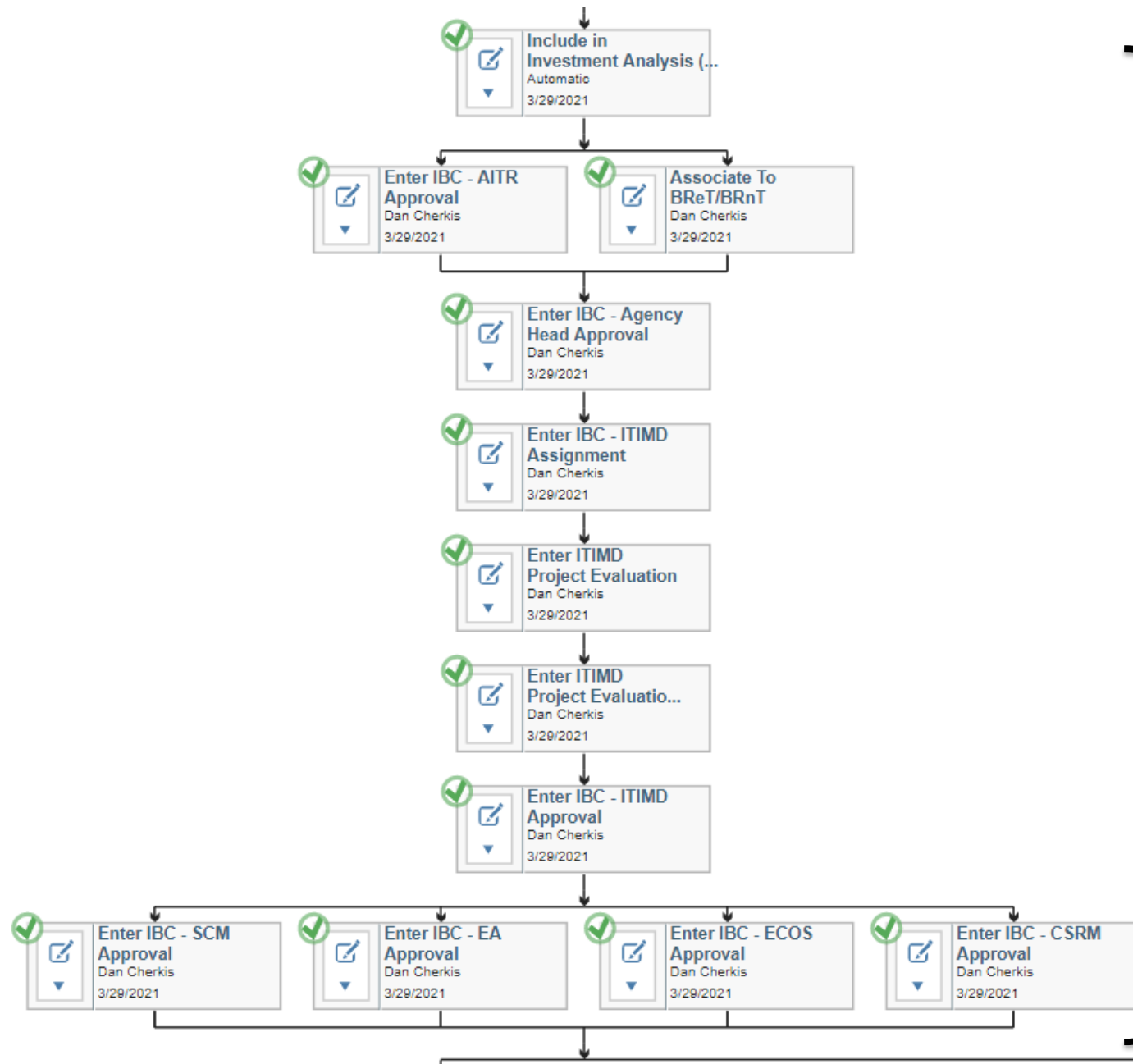
EMAIL NOTIFICATION: LIFECYCLE ITEM

- Review Item
- Approval checkbox + date stamp
- “Save and Complete” - - this advances the item Lifecycle to the next step in the process.
- “Save as Draft” - - this will save your changes, but NOT advance the Lifecycle to the next step.



CTP E1 “LIFECYCLE”

- Individuals (roles) will receive email notification when they need to complete an Active Lifecycle Step.
- Upon completion of the Active Lifecycle Step, the next task in sequence will become Active, and the User Responsible will receive email notification.



Example
CTP E1
Lifecycle
for
Investment
Business
Case (IBC)
approval.



VIEW LIFECYCLE: METHOD 1

Click on the Lifecycle icon, found on various screens, to View the Lifecycle.

Planview Enterprise One | My Overview | Work | Resources | Outcomes | Strategies | more ... ▼

2 Active Lifecycle Steps | 0 My Scheduled Assignments | MY24 - My Assignments | more ...

My Active Lifecycle Steps

Status	Lifecycle Step	Entity	Type	View Lifecycle	User Responsible	Lifecycle Role	
!	Enter Scope	testest ibc	Work		Pat Reynolds	Requester	2
!	Enter Budget Plan	02082021 Pat Test Project	Work		Pat Reynolds	Project Manager	2

RPM Tile: T105 - My Planview > Active Lifecycle Steps

VIEW LIFECYCLE: METHOD 2

In the Work View screen,
go to Overview – Work
Detail.

Click on Lifecycle, which
is highlighted.
Or...

Planview Enterprise One | My Overview | **Work** | Resources | Outcomes

Project testest ibc | View Work View

Overview | **Lifecycle** | Notifications | Work Effort | Changes | Risks

Work Detail | 1 Active Lifecycle Steps | 0 In Progress Timesheets | 0 Unprogre: Timeshe

Related Information: **Lifecycle**

Work Breakdown Structure

Description

Project: testest ibc

Basic

Project Status:	Requested
ICP Investment Approval:	Analyze
Internal Priority:	
Investment Type	Commonwealth Project

...Or, click on Lifecycle
sub-menu item.

TOP TIP: ACTIVE LIFECYCLE STEPS

- Shows current steps in the item Lifecycle.
- Work View > Overview > Active Lifecycle Steps (tile)

Project Example Project View Work View

Overview Lifecycle Notifications Work Effort Changes Risks Issues Assoc

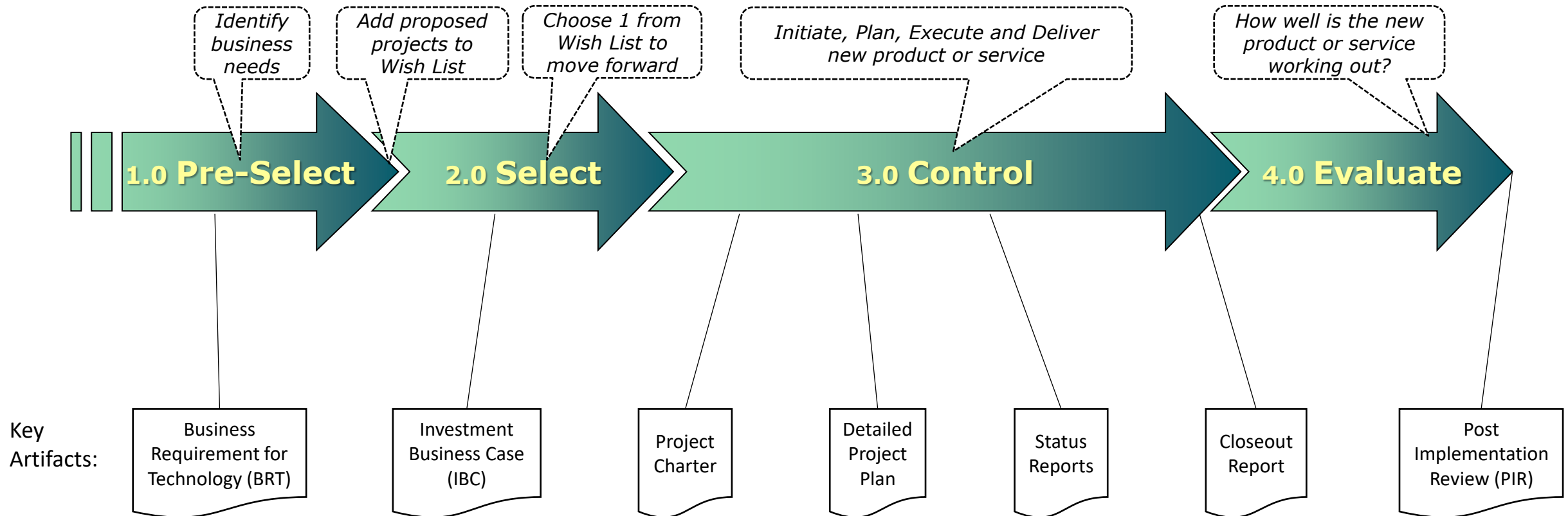
Work Detail Active Lifecycle Steps In Progress Timesheets Unprogressed Timesheets COVA Mc Project Statu

Active Lifecycle Steps

Status	Lifecycle Step	Entity	Type	Vi
!	Approve Change Detail Attributes	change!	Change	
!	Review	and here is another issue	Issue	
!	Review	What about Covid-20?	Risk	
!	Enter Change and Configuration Management Plan	Example Project	Work	

RPM Tile: T106 - Portfolio > Active Lifecycle Steps

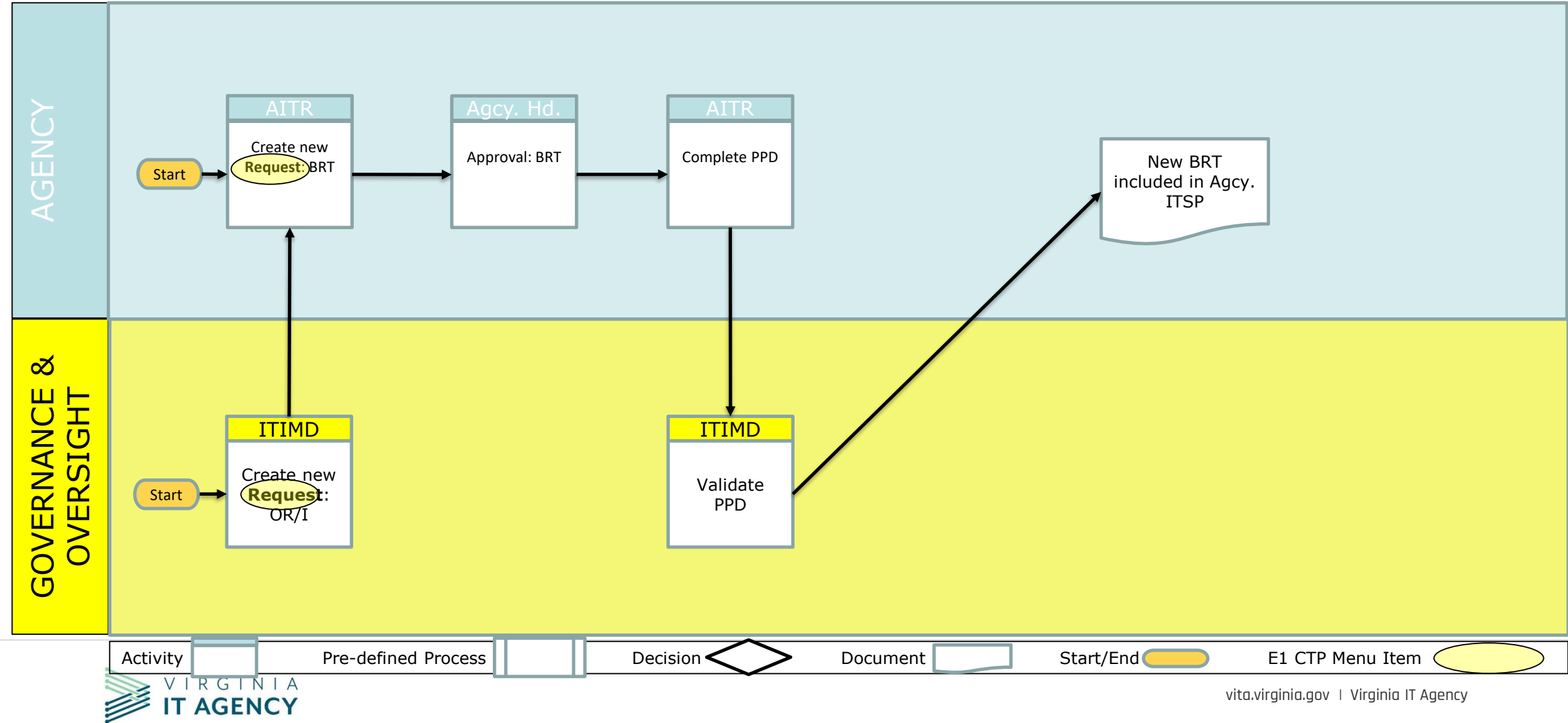
IT INVESTMENT MANAGEMENT (ITIM) LIFECYCLE: IT PROJECT \geq \$250,000



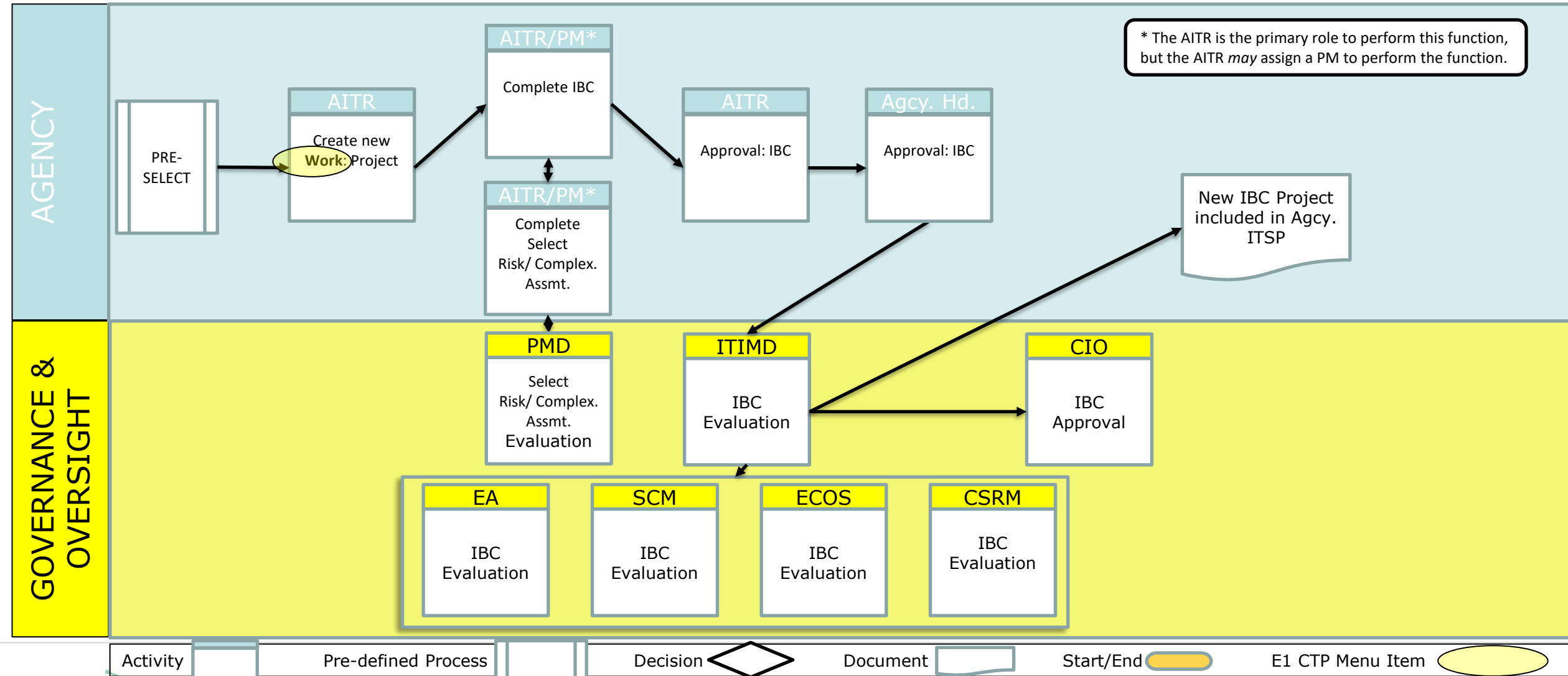
ITIM LIFECYCLE: 2.0 SELECT

1. 2.0 Select: Investment Business Case: *This is how we establish a Proposed Project*
2. Demonstration: Investment Business Case
3. Data Picker
4. IBC in the Financial Planning Detail window
5. Select (phase) Risk & Complexity
6. Student Exercise: IBC
 - A. Student01 - - -> Student 01 Project; Agency 000; Secretariat 000; AITR & Agency Head: "Training Admin"

1.0 PRE-SELECT



2.0 SELECT (PROJECT)



* The AITR is the primary role to perform this function, but the AITR *may* assign a PM to perform the function.

DATA PICKER

- Allows only valid values

▼ Agency Approvals

AITR

Training Admin

🔍

📖

📄

Agency Head

Training Admin

🔍

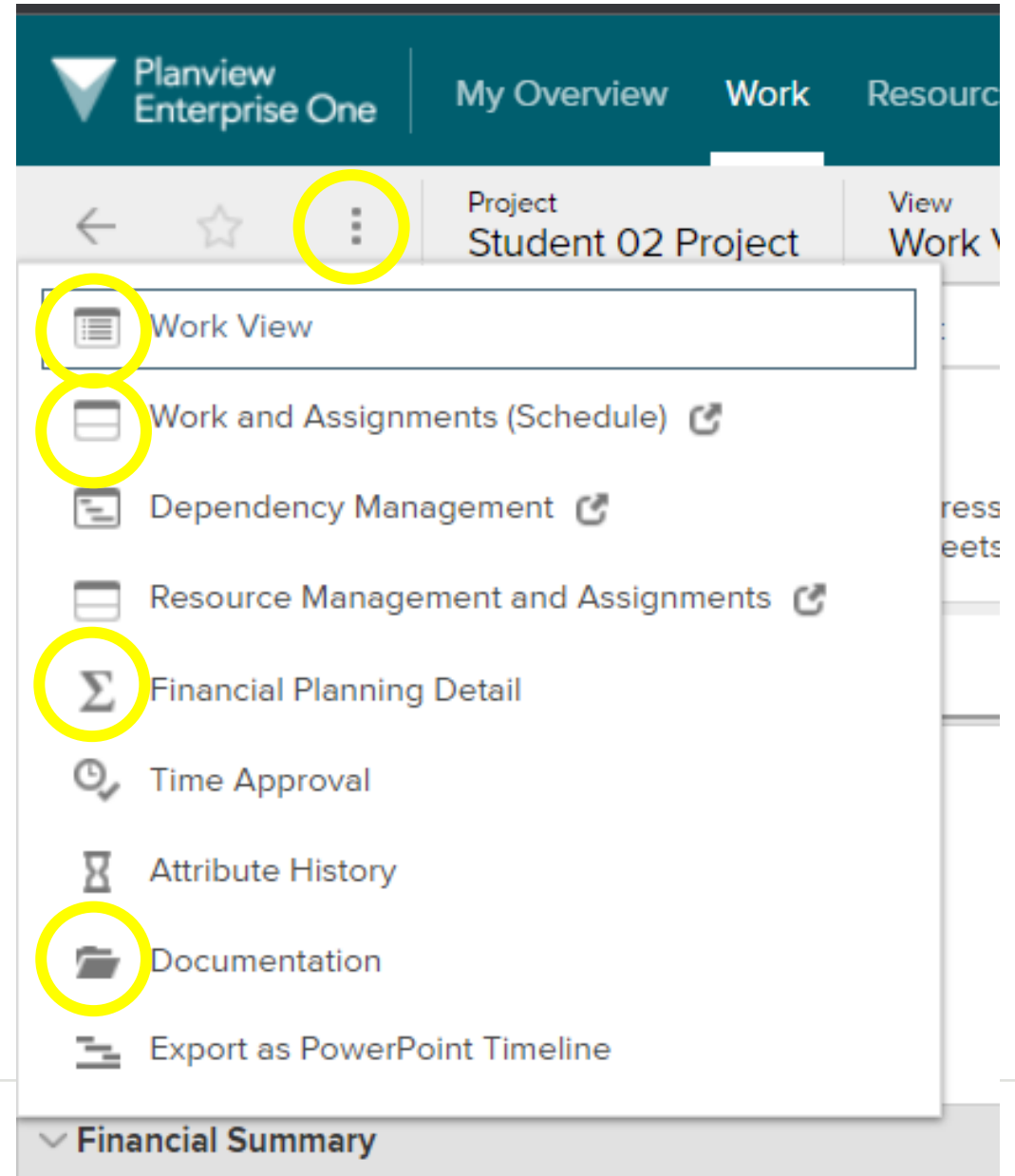
📖

📄

▼ Initial Cost Estimate

ACTION MENU

- We will only use four of the nine menu items:
 - Work View
 - Work and Assignments (Schedule)
 - Financial Planning Detail
 - Documentation



FINANCIAL PLANNING DETAIL

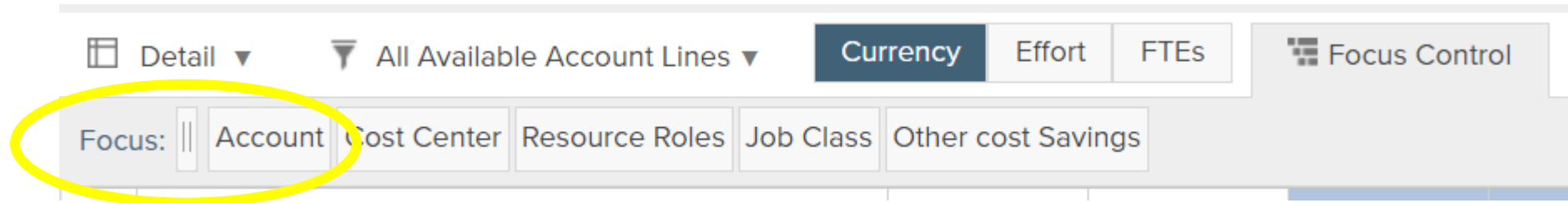
- Clean up your view

Project Class Example - Project		View Financial Planning Detail								
Detail ▼	All Available Account Lines ▼	Currency	Effort	FTIs	Focus Control		Add a Line		Enter text to filter grid	
Description		Measures	Line Notes	2016	2017	2018	2019	2020	2021	2022
▼ Project: Class Example - Project		USD								
> IBC - Benefits / Cost Avoidance		USD								
> IBC - Benefits / Cost Savings		USD								
> IBC - Benefits / Increased Efficiency		USD								
> IBC - Benefits / Increased Revenues		USD								
> IBC - Benefits / Other cost savings, ***		USD								
>>>> Funding / General Funds / GF Current IT...		USD								

FINANCIAL PLANNING DETAIL

- Focus Control

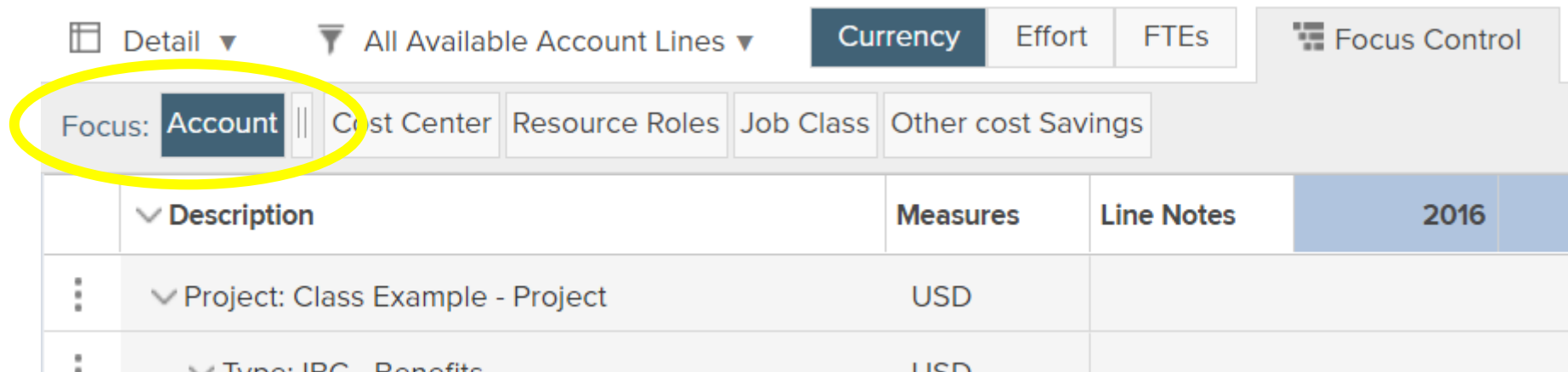
- From this...



Detail ▾ All Available Account Lines ▾ Currency Effort FTEs Focus Control

Focus: Account Cost Center Resource Roles Job Class Other cost Savings

- To this...



Detail ▾ All Available Account Lines ▾ Currency Effort FTEs Focus Control

Focus: Account Cost Center Resource Roles Job Class Other cost Savings

	Description	Measures	Line Notes	2016
⋮	Project: Class Example - Project	USD		
⋮	Type: IBC - Benefits	USD		

FINANCIAL PLANNING DETAIL

- Display Preferences

- From this...

Verify that 'Version' = 'Actual/Forecast (forecast)'

The screenshot shows the 'Financial Plan Preferences' dialog box. A red callout points to the 'Version' dropdown menu, which is set to 'Actual/Forecast (forecast)'. A yellow oval highlights the 'Viewable Range' section, where the 'Planning Horizon (Jul 2015 To Jun 2030)' option is selected. Another yellow oval highlights the 'Show Totals' section, where the 'Quarter' option is checked. The background shows a grid with years 2018 through 2024, with 2019, 2020, and 2021 highlighted in blue.

Version
Actual/Forecast (forecast) ▼

Enter text to filter grid

Months ▼

2018 2019 2020 2021 2022 2023 2024 2

Financial Plan Preferences

Viewable Range

☒ Planning Horizon (Jul 2015 To Jun 2030)

☐ Encompass schedule and cost (Oct 2021 To Oct 2021)

☐ Custom periods Jul 2015 ▼ To Jun 2030 ▼


Show Totals

☒ Quarter

FINANCIAL PLANNING DETAIL

- Display Preferences
 - To this...

Verify that 'Version' = 'Actual/Forecast (forecast)'

Focus Control Add a Line Enter text to filter grid Months 

2022	2023	Total

Financial Plan Preferences

Viewable Range

☐ Planning Horizon (Jul 2015 To Jun 2030)
☐ Encompass schedule and cost (Oct 2021 To Oct 2021)
☒ Custom periods Jul 2021 To Jun 2023

Show Totals

☒ Quarter
☒ Year
☐ Actuals/Forecast

Note:

The "Total" column is impacted by the "Custom periods" date range; that is, the "Total" is the sum of **ONLY** the dates selected in the "Viewable Range"

- - not necessarily the Grand Total for the entire project.

FINANCIAL PLANNING DETAIL

- Expand / Collapse Fiscal Year, Quarter, Month
- (hover over column header)

- From this...

es	Line Notes	2022	2023	Total
		Expand		

- To this...

Q1 2022	Q2 2022	Q3 2022	Q4 2022	2022	2023
			Expand		

- To this...

rol	Add a Line					Enter text	Collapse	
	Q2 2022	Q3 2022	Apr 2022	May 2022	Jun 2022	Q4 2022	2022	

FINANCIAL PLANNING DETAIL

- Major IT Project, General Funds

<div> <div>☆</div> <div>Project</div> <div>Class Example - Project</div> <div>View</div> <div>Financial Planning Detail</div> </div>						
<div> <div>Detail ▼</div> <div>All Available Account Lines ▼</div> <div>Currency</div> <div>Effort</div> <div>FTEs</div> <div>Focus Control</div> <div>Add a Line</div> </div>						
	▼ Description	Measures	Line Notes	2022	2023	Total
⋮	▼ Project: Class Example - Project	USD				
⋮	> Type: IBC - Benefits	USD				
⋮	▼ Type: Funding	USD				
⋮	▼ > General Funds	USD				
⋮	>> GF Current IT Services	USD				
⋮	▼ >> GF Proposed IT Investments	USD				
⋮	>>> Major IT Projects	USD		100,000.00	100,000.00	200,000.00
⋮	>>> Non Major IT Projects	USD				

FINANCIAL PLANNING DETAIL

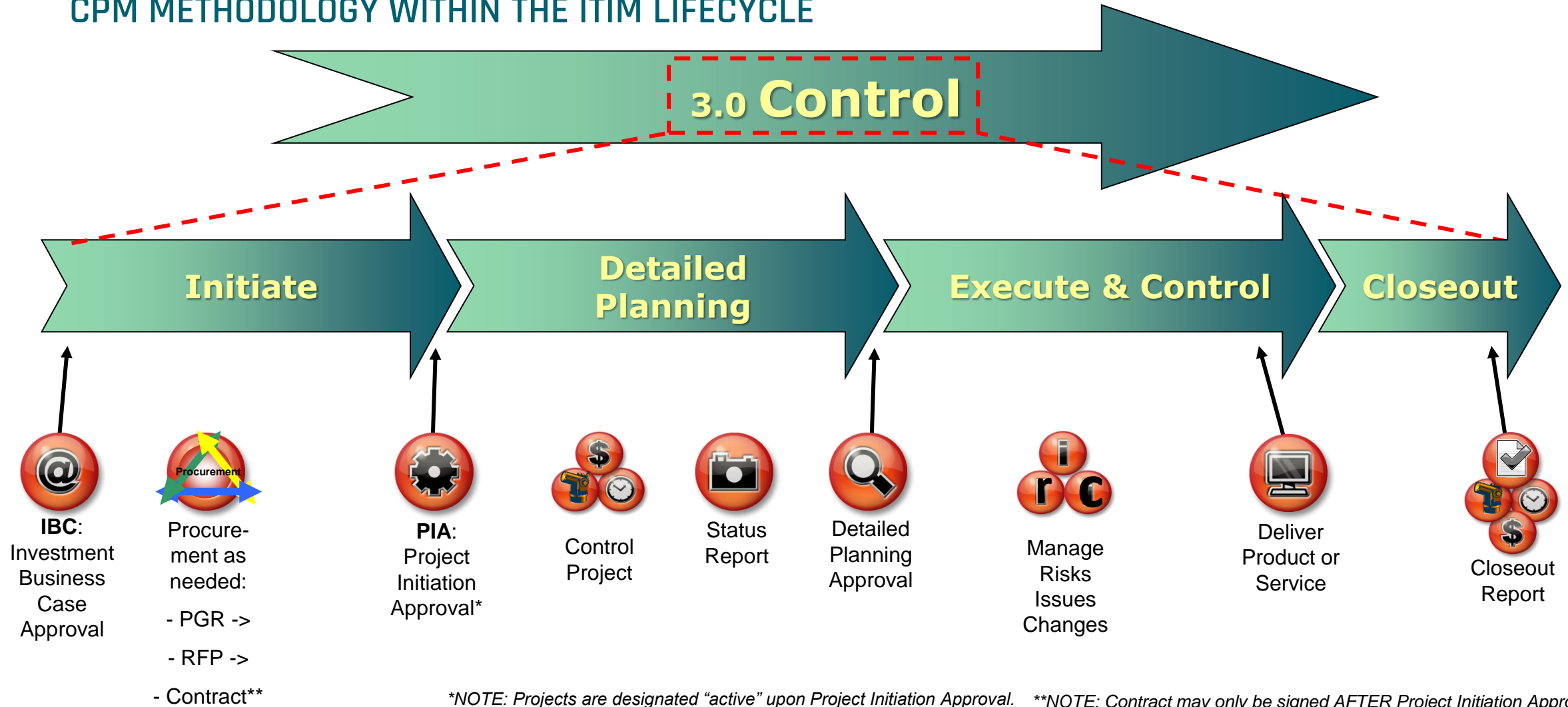
- Major IT Project, Non-General Funds (and/or) Federal Funds

Class Example - Project Financial Planning Detail						
Detail ▼ All Available Account Lines ▼ Currency Effort FTEs Focus Control Add a Line						
	▼ Description	Measures	Line Notes	2022	2023	Total
⋮	▼ > Non General Funds	USD				
⋮	> >> NGF Current IT Services	USD				
⋮	▼ >> NGF Proposed IT Investments	USD				
⋮	>>> Major IT Projects	USD				
⋮	>>> Agency-Level Stand Alone IT Pro...	USD				
⋮	>>> Procurement Adjustment for Sta...	USD				
⋮	> Federal Funds	USD		222,222.00	222,222.00	444,444.00
⋮	> Other	USD				
⋮	> Type: Funding Need	USD				

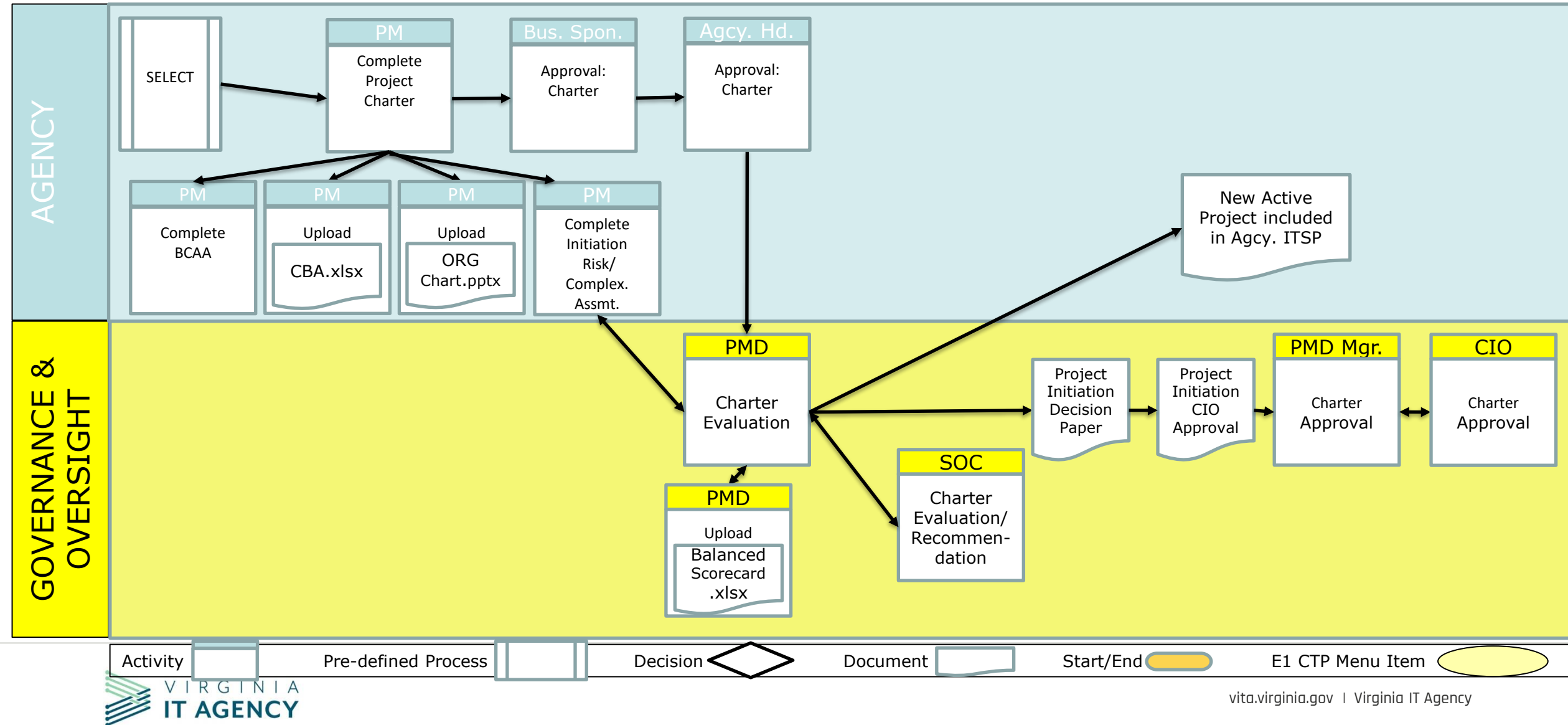
ITIM LIFECYCLE: 3.0 CONTROL: INITIATION

1. 3.0 Control: Initiation Phase: *This is how we get to “Project Initiation Approval” (PIA)*
2. Demonstration: Initiation Phase
3. Business Case & Alternatives Analysis (BCAA)
4. Cost-Benefit Analysis (CBA)
5. Project Charter
 - A. Work and Assignments (Schedule)
 - B. Financial Planning Detail
6. Student Exercise: Project Initiation: Build upon ‘Student 01’ Project...

CPM METHODOLOGY WITHIN THE ITIM LIFECYCLE

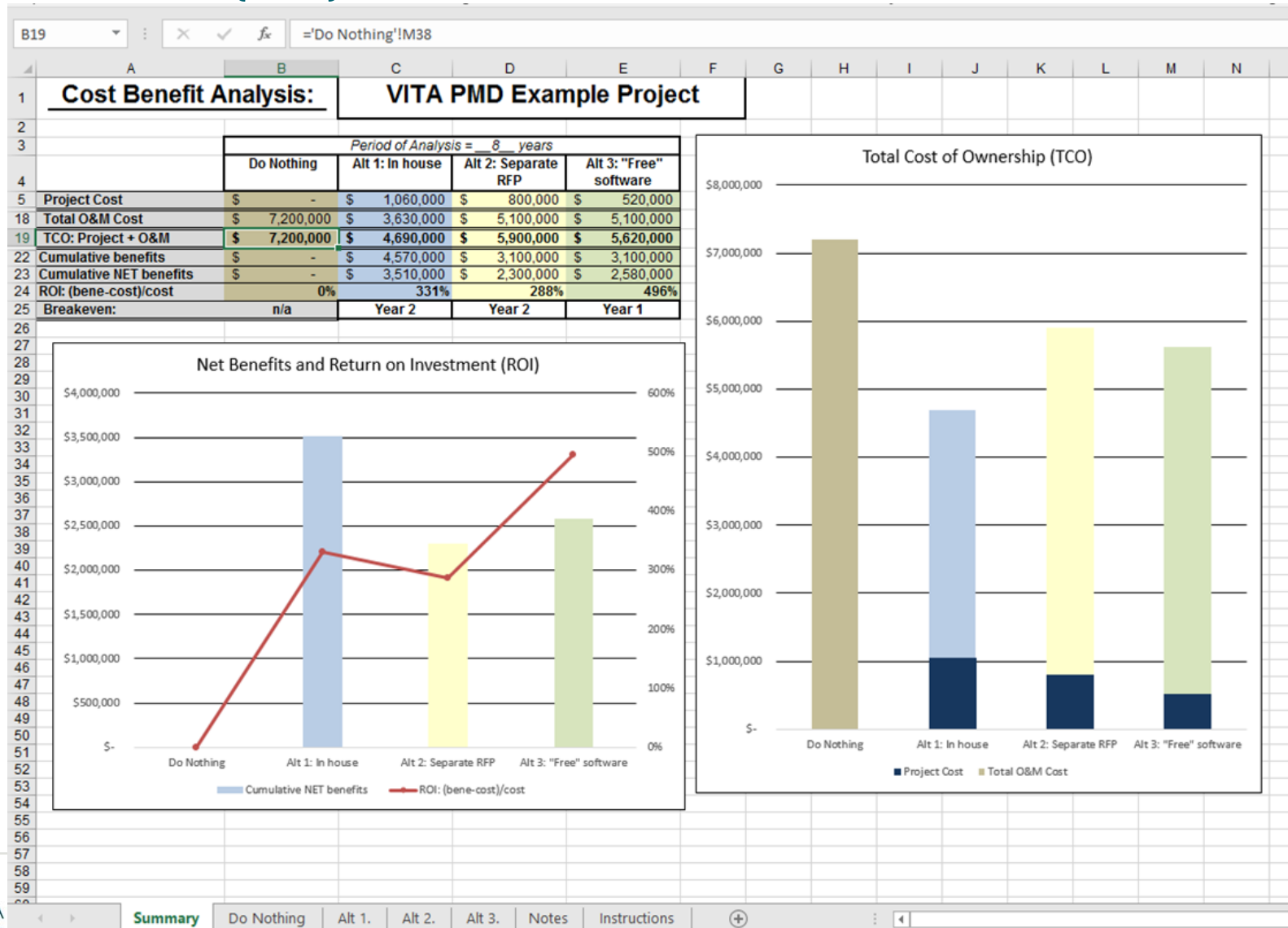


3.0 CONTROL/INITIATION (PROJECT)



REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Business Case & Alternatives Analysis	Required	Required	Required	Required
Cost / Benefit Analysis	Required	Required	Required	Summarize in BCAA & Charter
<i>Full-Time Project Manager</i>	Shall, or by exception	Shall, or by exception	Shall, or by exception	Full-time not required
Project Initiation Risk / Complexity Assessment	Required	Required	Required	Required
Charter, with Project Team Organization Chart	Required	Required	Required	Required
<i>Internal Agency Oversight Committee? (IAOC)</i>	Required, with PMD	Required, with PMD	Required, with PMD	None; Agcy. PM Team only
<i>(PMD): Balanced Scorecard</i>	Required, delphi	Required, delphi	Required, delphi	Not required
<i>Project Initiation Approval Path:</i>	Sponsor > Agcy Hd > SOC > PMD > CIO	Sponsor > Agcy Hd > SOC > PMD > CIO	Sponsor > Agcy Hd > SOC > PMD > CIO	Sponsor > Agcy Hd

COST-BENEFIT ANALYSIS (CBA)



FINANCIAL PLANNING DETAIL

- Project Budget

▼ Type: Budget Plan - Costs	USD		358,023.00	222,344.00	580,367.00
> Internal Staff Labor	USD		123,456.00	78,900.00	202,356.00
> Services	USD		234,567.00	123,444.00	358,011.00
> Software Tools	USD				
> Hardware	USD				
> Maintenance	USD				
> Facilities	USD				
> Telecommunications	USD				
> Training	USD				
> IV & V	USD			20,000.00	20,000.00
> Contingency (Risk)	USD				
> Pre-Project Initiation	USD				
> Other Costs	USD				

WORK AND ASSIGNMENTS

- Column Set 1. Project – Build Schedule (used for Charter, Detailed Planning)

Project

Child Support Payment Processing

View

Work and Assignments (Schedule)

Schedule

1. Project - Build Schedule

Planning & Scheduling Baseline

	Line #	> Name	Schedule Start	Duration	Schedule Finish	Co
	1	▼ Project: Child Support Payment Proces...	4/14/2021	230.0d	3/16/2022	
	2	• Work: Project Kickoff				S
	3	• Work: Develop Project Documentati...				S
	4	• Work: Requirements Validation				S
	5	• Work: Hardware Procurement	4/14/2021	46.0d	6/17/2021	F
	6	• Work: Design	4/23/2021	68.0d	7/30/2021	F
	7	• Work: Software Development	8/9/2021	86.0d	12/14/2021	F
	8	• Work: Testing	8/17/2021	80.0d	12/14/2021	F
	9	• Work: Training & UAT	1/4/2022	13.0d	1/20/2022	F

WORK AND ASSIGNMENTS

- Column Set 3. Project – Track Progress (used for Status Reports)

←

★

⋮

Project

Child Support Payment Processing

View

Work and Assignments (Schedule)

📅

Schedule ▾

📊

3. Project - Track Progress ▾

📅

Planning & Scheduling Baseline ▾

	Line #	> Name	Actual Start	Percent Complete	Actual Finish	Du
⋮	1	▼ Project: Child Support Payment Proces...	3/31/2021	29		
⋮	2	▫ Work: Project Kickoff	3/31/2021	100	3/31/2021	
⋮	3	▫ Work: Develop Project Documentati...	3/31/2021	100	4/1/2021	
⋮	4	▫ Work: Requirements Validation	4/12/2021	100	5/27/2021	
⋮	5	▫ Work: Hardware Procurement	4/14/2021	50		
⋮	6	▫ Work: Design	5/28/2021	85		
⋮	7	▫ Work: Software Development				

WORK AND ASSIGNMENTS

- Reveal / Hide Columns

The screenshot displays a project management interface with a table containing the following data:

Line #	Name	Work Status	Schedule Start
1	Project: Class Example - Project	Requested	
2	>: Kickoff	Requested	

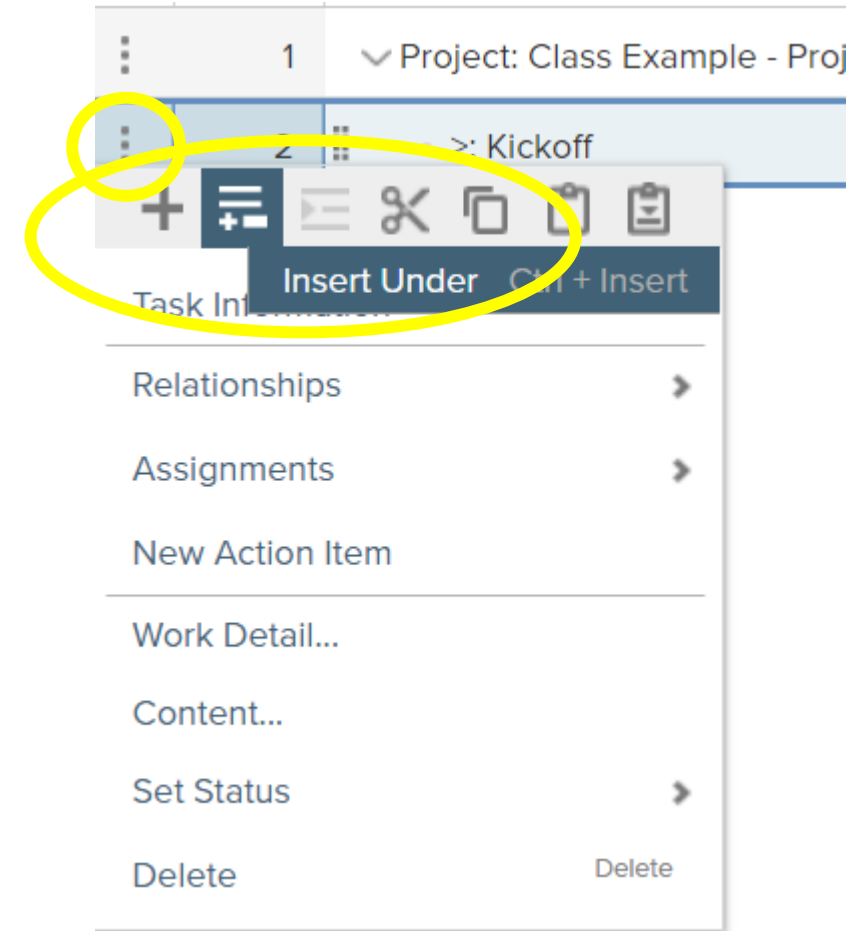
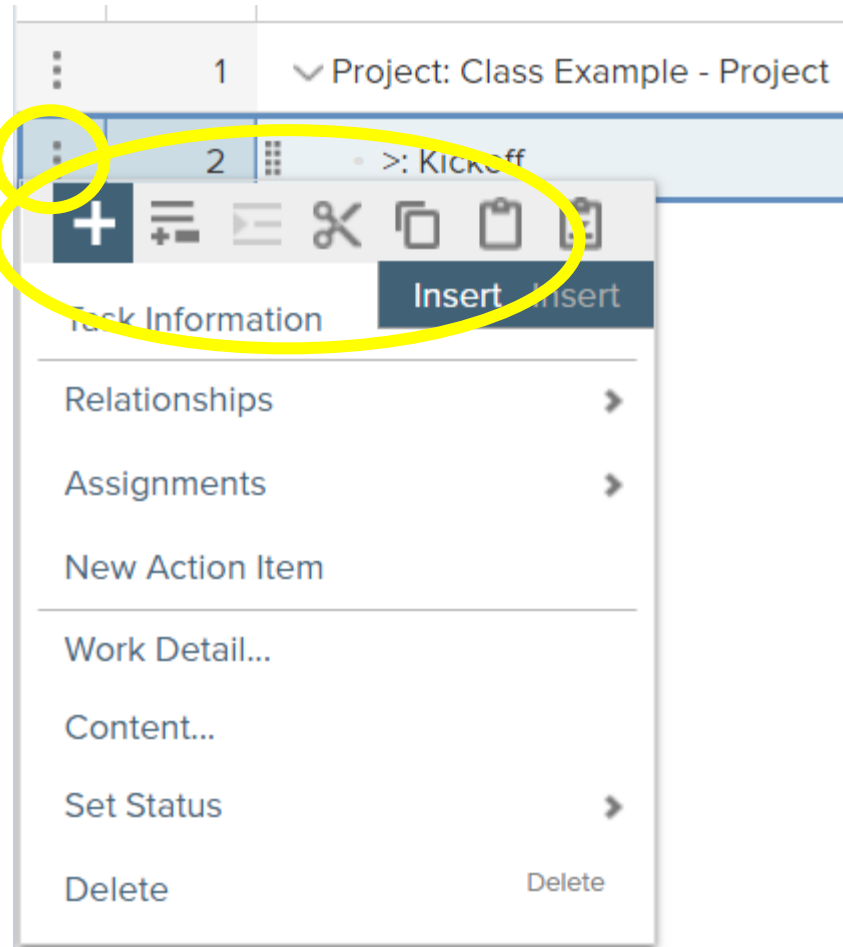
A right-click context menu is open over the 'Work Status' column of the second row. The menu includes the following options:

- ☐ Line #
- ☐ Name
- ☒ Work Status
- ☒ Schedule Start
- ☒ Duration
- ☒ Schedule Finish

Annotations in the image include a yellow circle highlighting the 'Work Status' column and the context menu, and two red callout boxes: one labeled 'Right Click' pointing to the context menu, and another labeled 'Select Columns' pointing to the menu items.

WORK AND ASSIGNMENTS

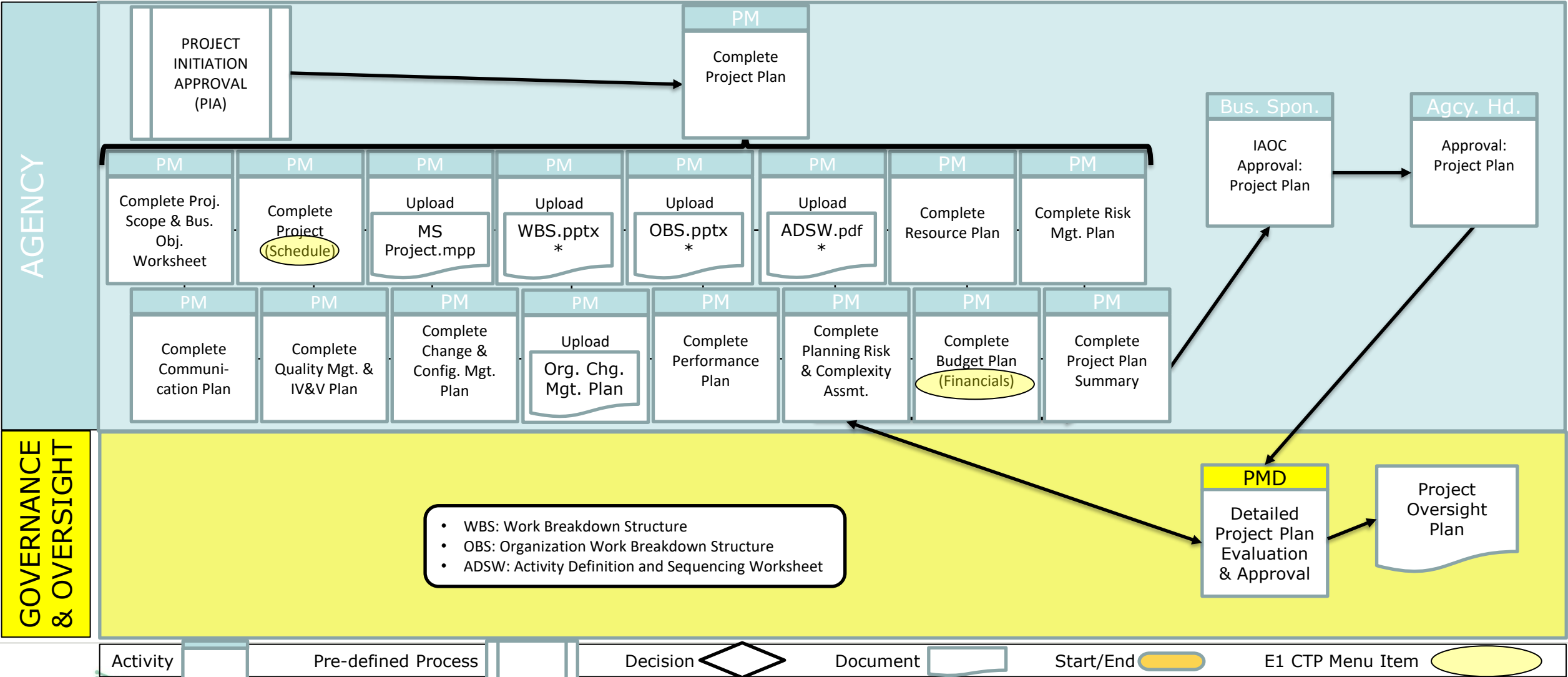
- Tasks: Insert, Insert Under



ITIM LIFECYCLE: 3.0 CONTROL: DETAILED PLANNING

1. 3.0 Control: Detailed Planning Phase: *This is how we get to “Detailed Planning Approval”*
2. Detailed Planning Phase Lifecycle Steps
3. Demonstration: Project Schedule
4. Demonstration: Financial Planning Detail
5. Student Exercise (optional): Project Detailed Planning
 - A. Project Schedule
 - B. Financial Planning Detail

3.0 CONTROL/DETAILED PLANNING (PROJECT)



WORK MENU

- Show - Select - Action

The screenshot displays the 'Work' menu in a software application. The top navigation bar includes links for 'view', 'Administration', 'Timesheet', 'Requests', 'Work' (highlighted with a yellow circle), 'Resources', 'Outcomes', 'Strategies', and a 'more ...' dropdown. On the right of the navigation bar are a '+ New' button and a search bar. Below the navigation bar, the page title is 'Example - Project' and the view is 'Work and Assignments (Schedule)'. The main content area is titled 'Work Menu' (highlighted with a yellow circle). It is divided into three columns: 'Show', 'Select', and 'Action'. In the 'Show' column, 'Work Portfolios' and 'Work' (highlighted with a yellow circle) are listed, along with '+ New Work Portfolio' and '+ New Work'. In the 'Select' column, a dropdown menu is set to 'Recently Visited Work' (highlighted with a yellow circle). Below it, a list of items is shown: 'Class Example - Project' (highlighted with a yellow circle and an orange star icon), 'Gaines project', 'Gaines procurement', 'Tracy project', and 'Tracy procurement'. In the 'Action' column, several options are listed: 'Work View', 'Work and Assignments (Schedule)' (highlighted with a yellow circle), 'Dependency Management', 'Resource Management and Assignments', 'Financial Planning Detail' (highlighted with a yellow circle), 'Time Approval', and 'Documentation' (highlighted with a yellow circle).

view Administration Timesheet Requests **Work** Resources Outcomes Strategies more ... ▾ + New Search

Example - Project View Work and Assignments (Schedule)

Work Menu

Show Select Recently Visited Work ▾ Action

Work Portfolios

Work

+ New Work Portfolio

+ New Work

Class Example - Project

Gaines project

Gaines procurement

Tracy project

Tracy procurement

Work View

Work and Assignments (Schedule)

Dependency Management

Resource Management and Assignments

Financial Planning Detail

Time Approval

Documentation

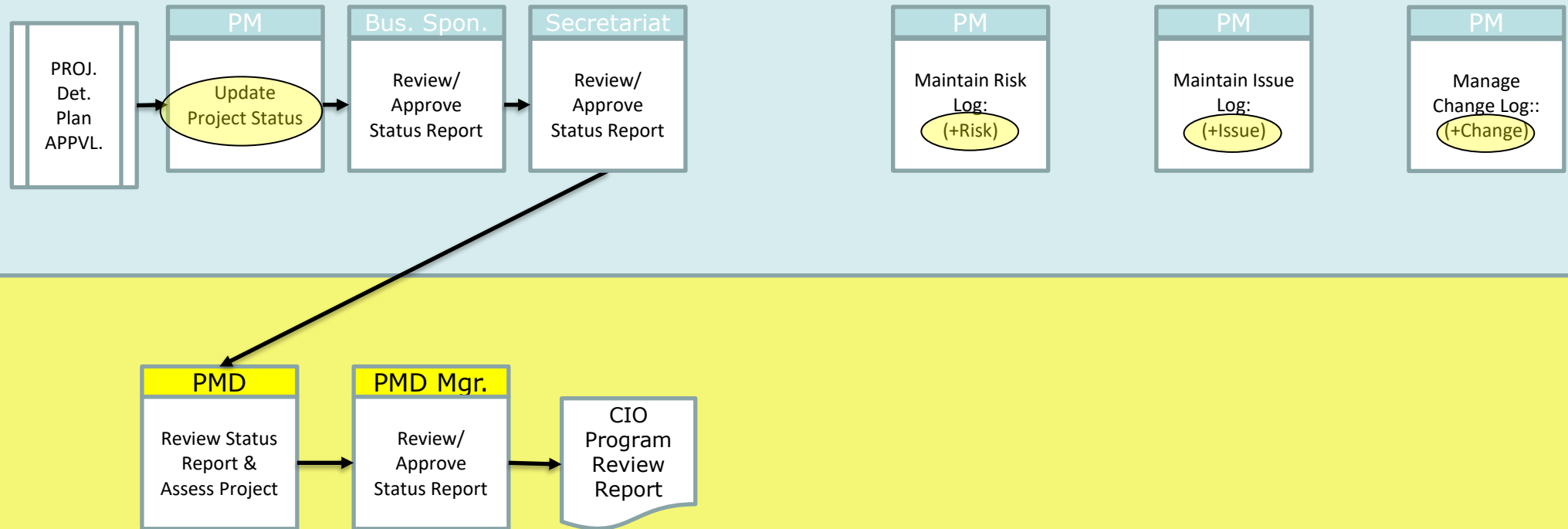
REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Project Scope & Business Objective Worksheet	Required	Required	Required	Required
Work Breakdown Structure	Required	Required	Required	Optional
Organization Work Breakdown Structure	Required	Required	Optional	Optional
Activity Definition and Sequencing Worksheet	Required	Optional	Optional	Optional
Resource Plan	Required	Required	Optional	Optional
Project Schedule (CTP: "Work & Assignments")	Required	Required	Required	Required
Risk Management Plan	Required	Required	Required	Required
Communication Plan	Required	Required	Required	Optional

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Quality Management & IV&V Plan	Required	Required	Required	Optional
Change & Configuration Management Plan	Required	Required	Required	Optional
<i>Organization Change Management Plan</i>	Required	Required	Required	Optional
Performance Plan	Required	Required	Required	Optional
Budget Plan (CTP: "Financial Planning Detail")	Required	Required	Required	Required
Project Plan	Required	Required	Required	Required
Planning Risk / Complexity Assessment	Required	Required	Required	Required
<i>Detailed Planning Approval; up to +10% baseline, approved by...</i>	IAOC > Sponsor > Agcy Head > PMD	IAOC > Sponsor > Agcy Head > PMD	IAOC > Sponsor > Agcy Head > PMD	Sponsor (+20%)

ITIM LIFECYCLE: 3.0 CONTROL: EXECUTION & CONTROL

1. 3.0 Control: Execution & Control Phase: *This is how we get to implementing the new product or service*
2. Demonstration: Project Status Reporting
3. Risk Management
4. Issue Management
5. Change Control Request
6. Operations and Maintenance (O&M) Planning

3.0 CONTROL/EXECUTION & CONTROL (PROJECT)



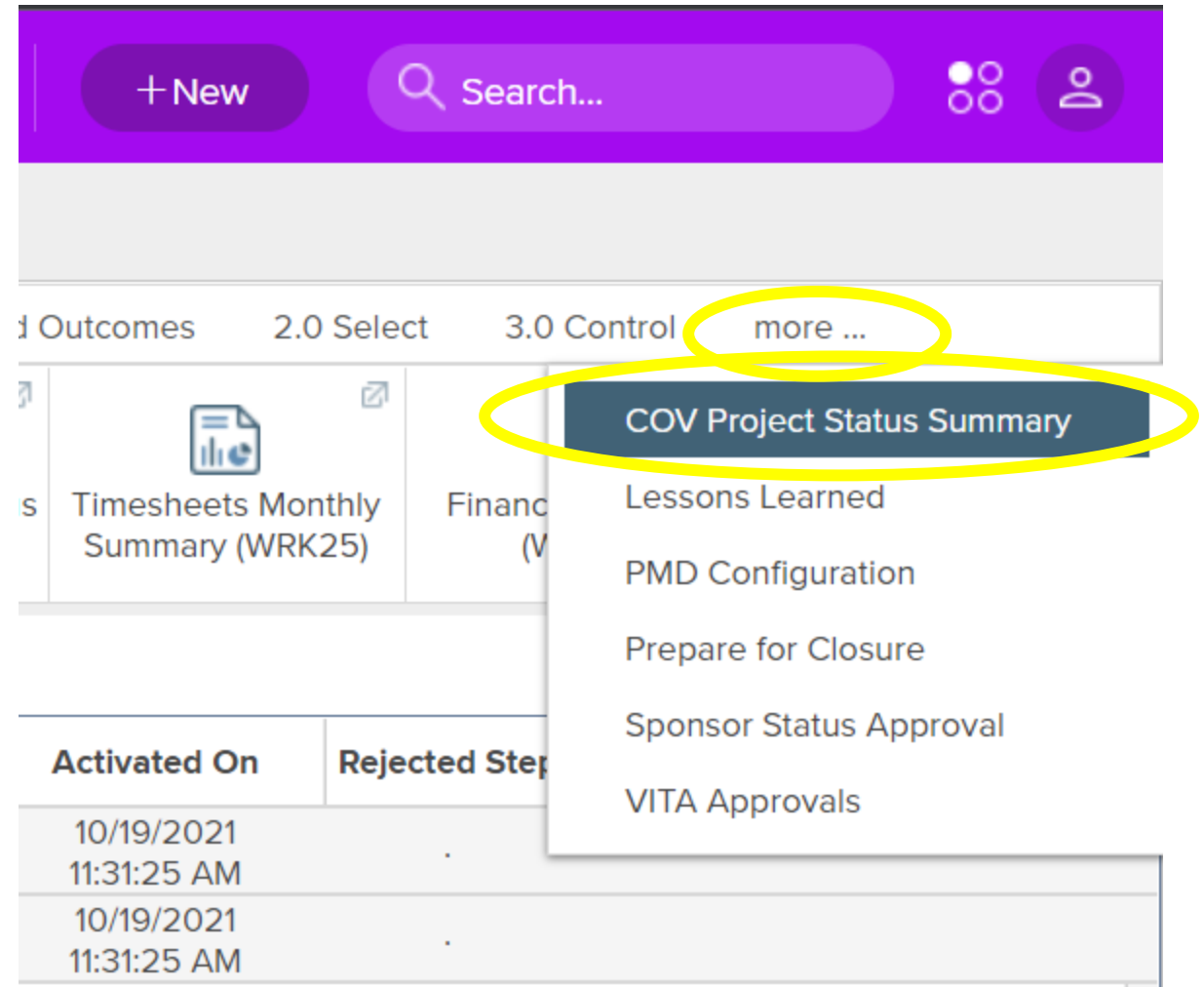
REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
<i>IAOC Project Meetings</i>	Monthly, w/PMD	Monthly, w/PMD	Quarterly, w/PMD	None; Agcy PM Team
<i>In-Progress IV&V; to coincide with project phases</i>	Required within 6 mo. of Planning Approval...	...then annual if project > 12 mo. duration.	Optional	None
<i>Issue Log & Risk Log</i>	Required	Required	Required	Optional
Status Report in CTP	Required; monthly	Required; monthly	Required; start, then quarterly	Required; start, then each January & July
"Nominal" Change Control Request	+10%, or 4 mo., if project is ≤ 24 mo. duration...	...approved by IAOC & Sponsor	Same as Cat. 1 and 2	Same as Cat. 1, 2 and 3, except +20% threshold
"Significant" Change Control Request	>+10% approved by IAOC,...	...Sponsor, Agcy Head,...	...Sec. Oversight Cmte. & CIO	>+20%, approved by Sponsor & Agcy Head
Event-Driven Risk/Complexity Assessment	Required after "Significant" Change Control Request	Required after "Significant" Change Control Request	Required after "Significant" Change Control Request	Required after "Significant" Change Control Request
O&M Funding Costs Estimate	Required	Required	Required	Required

COV PROJECT STATUS SUMMARY

- Category 1 & 2: Monthly
- Category 3: Quarterly
- Category 4: Semi-annually (Jan & July)

Update fields on the Form:

- Reporting Period
- 5 Key Status Indicators (KSI)
- Project % Complete
- Financial Planning Detail Update
- Work & Assignments (Sched.) Update
- PM Comments
- <<Project Sponsor Assessment>>
- <<Secretariat Status Assessment>>



PROJECT STATUS: FINANCIAL PLANNING DETAIL

- Use Actual/Forecast (forecast) version!
- Update each month / budget category with Actual Spend
 - **Overwrite** the **forecasted** spend with the **actual** spend
 - Monthly, or Quarterly (Cat 3), or two Quarters (Cat 4)
 - Leave future (forecasted) amounts unchanged.

Detail ▼		All Available Account Lines ▼		Currency	Effort	FTEs	Focus Control	
▼ Description		Measures	Q1 2022	Oct 2021	Nov 2021			
▼ Type: Budget Plan - Costs		USD	89,506	279,246	29,800			
> Internal Staff Labor		USD	30,864	55,679	10,200			
> Services		USD	58,642	223,567	19,500			
> Software Tools		USD						

PROJECT STATUS: WORK AND ASSIGNMENTS

- Column Set 3. Project – Track Progress
- Update each task / milestone with Actual Start, % Complete, Actual Finish

Project Child Support Payment Processing			View Work and Assignments (Schedule)		
Schedule ▾			3. Project - Track Progress ▾		
			Planning & Scheduling Baseline ▾		
	Line #	> Name	Actual Start	Percent Complete	Actual Finish
⋮	1	Project: Child Support Payment Proces...	3/31/2021	29	
⋮	2	• Work: Project Kickoff	3/31/2021	100	3/31/2021
⋮	3	• Work: Develop Project Documentati...	3/31/2021	100	4/1/2021
⋮	4	• Work: Requirements Validation	4/12/2021	100	5/27/2021
⋮	5	• Work: Hardware Procurement	4/14/2021	50	
⋮	6	• Work: Design	5/28/2021	85	

CHANGE CONTROL

- Changes + Change

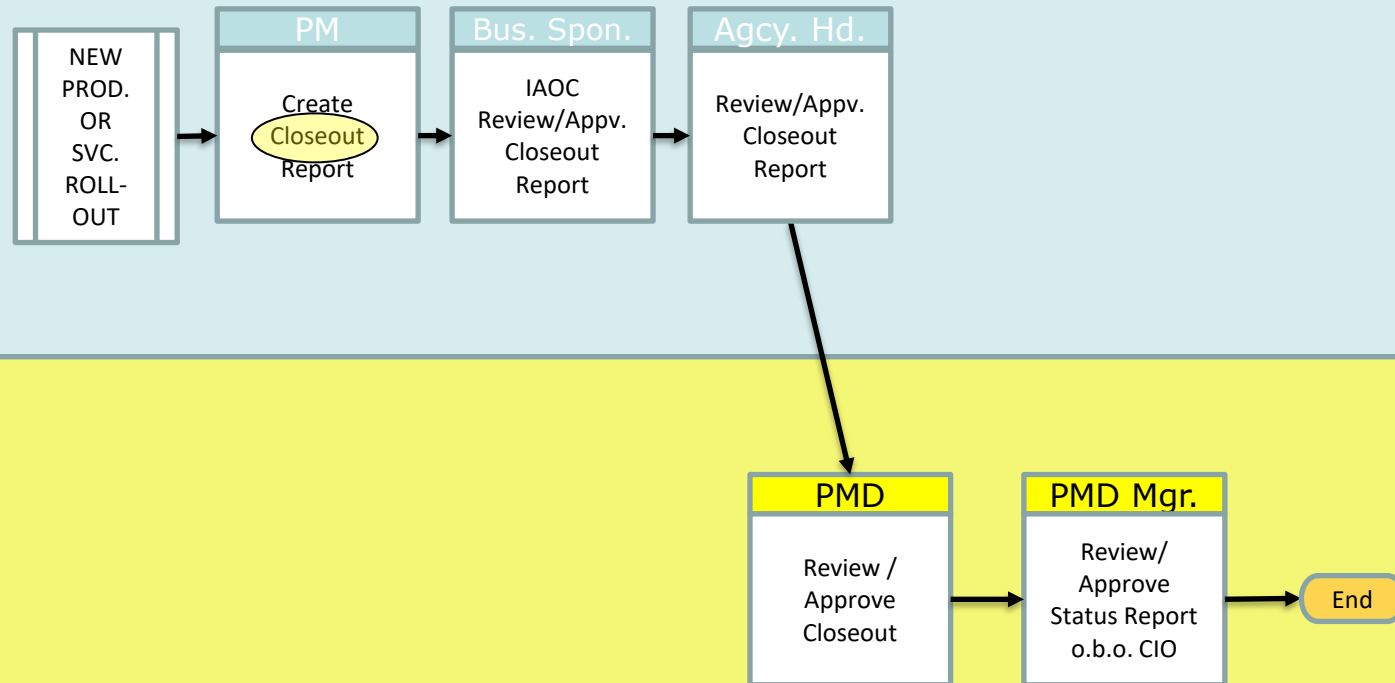
The screenshot displays the Planview Enterprise One interface. At the top, the breadcrumb navigation shows 'Project' and 'Class Example - Project'. Below this, a horizontal menu contains tabs for 'Overview', 'Lifecycle', 'Notifications', 'Work Effort', 'Changes', 'Risks', and 'Issues'. The 'Changes' tab is selected and highlighted with a yellow circle. To the left of the main content area, a '+ Change' button is also circled in yellow. The main content area shows a table with columns 'ID', 'Name', 'Priority', and 'Status'. A modal window titled 'New Change' is open, featuring a purple header bar and a yellow circle around the title. The modal contains a 'Basic Info' section with the following fields:

Basic Info	
Work Item	Class Example - Project
Name	
ID	C-25667
Status	Open <input type="button" value="v"/>
Priority	Medium <input type="button" value="v"/>
Description	

ITIM LIFECYCLE: 3.0 CONTROL: CLOSEOUT

1. 3.0 Control: Closeout Phase: *This is how we get to closing out the project*
2. Closeout requirement is the same for all Category 1 - 4 projects.
3. Planned v. Actual
 - A. Scope
 - B. Schedule
 - C. Budget
4. Lessons Learned

3.0 CONTROL/CLOSEOUT (PROJECT)

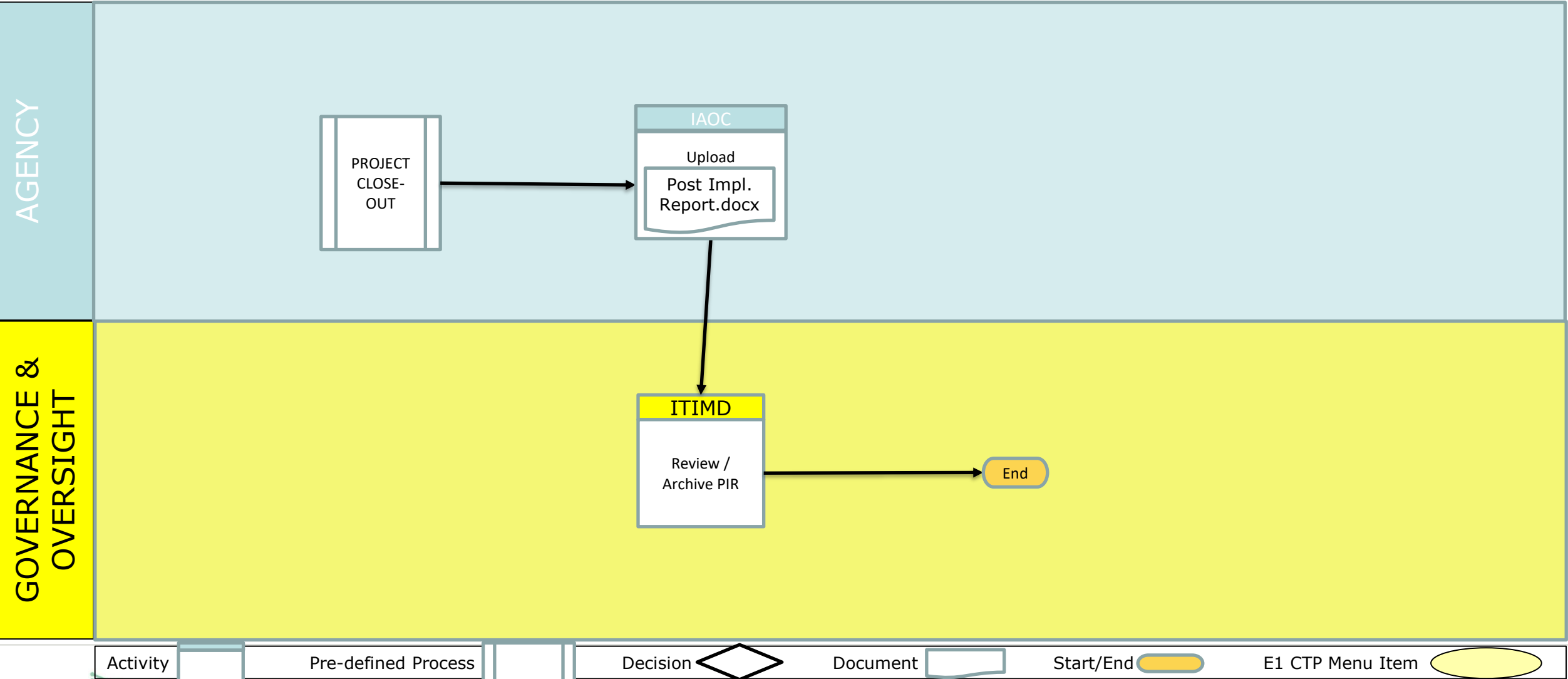


REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Project Closeout Report	Required	Required	Required	Required

ITIM LIFECYCLE: 4.0 EVALUATION

1. 4.0 Evaluation
2. PMs normally do not do this phase.
3. However, the Project Sponsor is responsible for the PIR, and you might be involved in this.
4. Evaluation phase consists of conducting Post-Implementation Review, (PIR) and uploading results into CTP.
5. PIR: The agency analyzes the business value obtained by implementing the IT project
 - *"Is the new product/service delivering the business value envisioned in the Project Charter?"*
6. May lead to opportunities for improvement

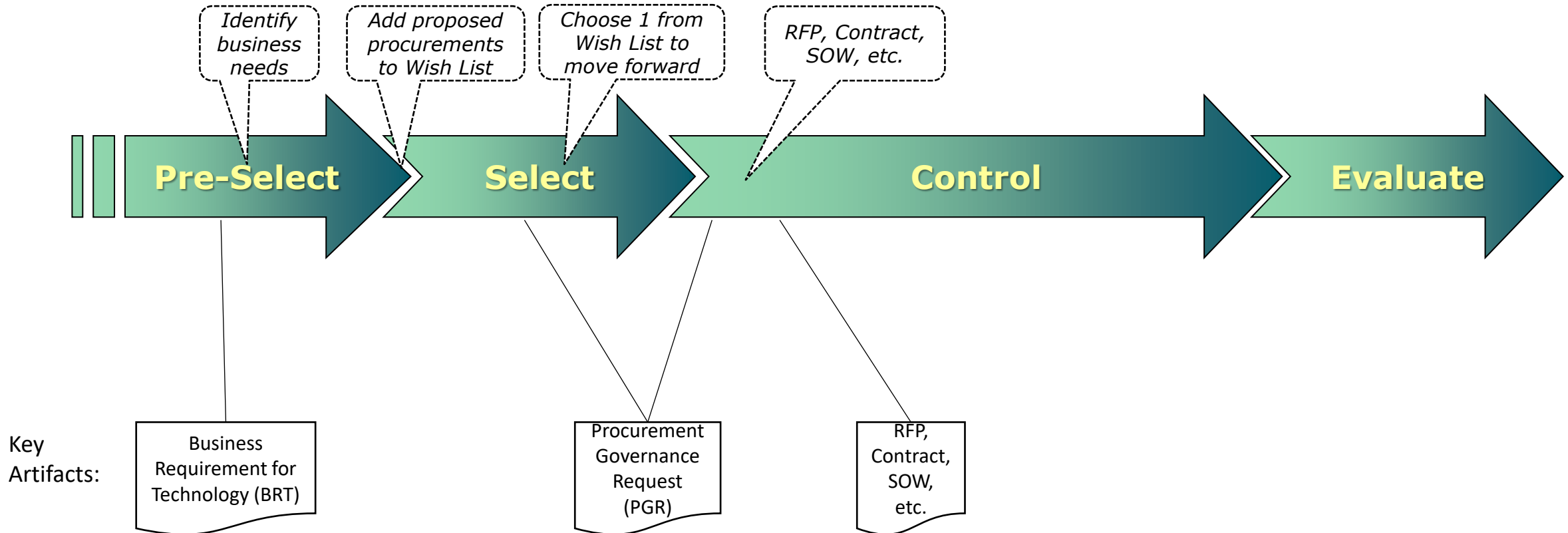
4.0 EVALUATION (PROJECT)



ITIM METHODOLOGY FOR IT PROCUREMENTS (\geq \$250,000)

1. April 2022: Significantly consolidated, shortened IT Procurement Lifecycle!
2. 1.0 Pre-Select - 2.0 Select - 3.0 Control: Consolidated into a single phase.
3. 4.0 Evaluation – N/A

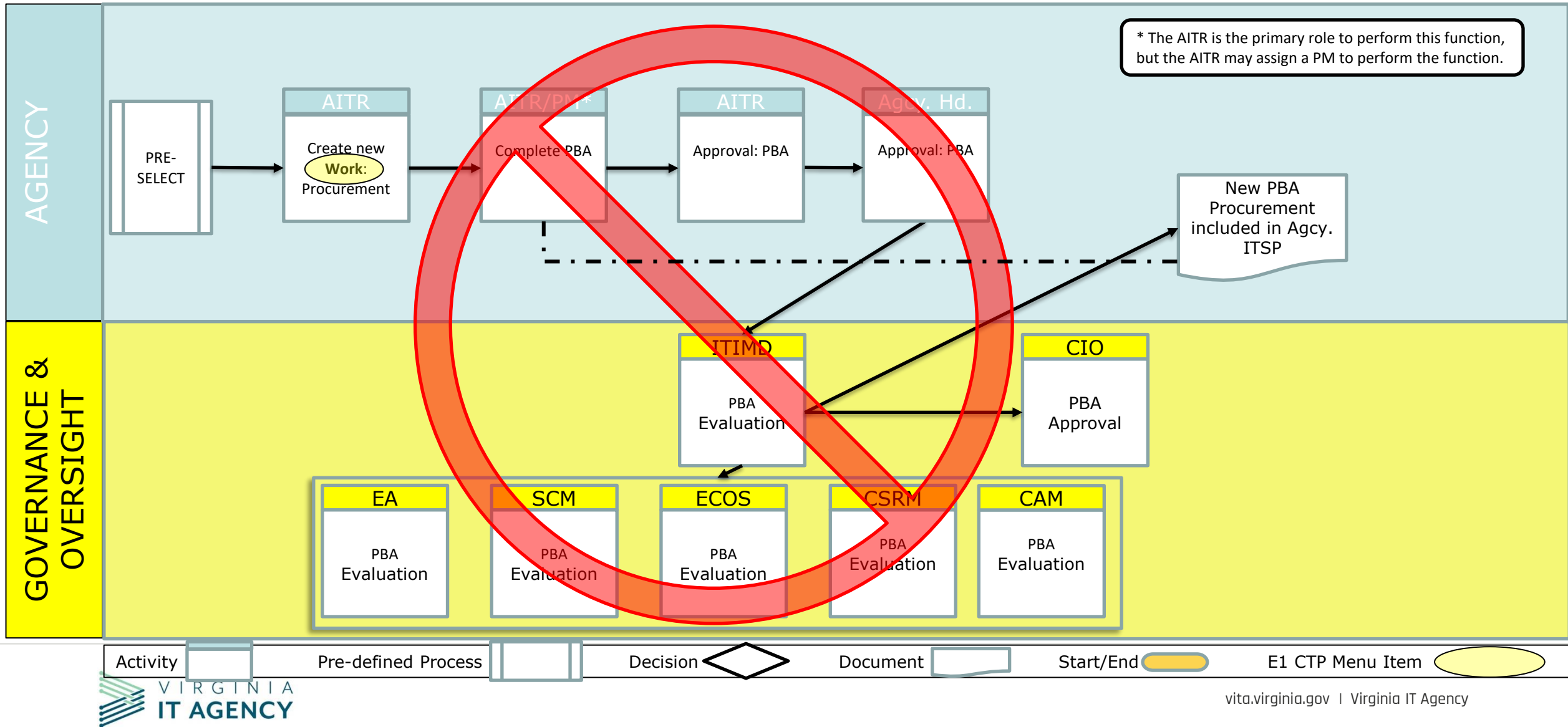
IT INVESTMENT MANAGEMENT (ITIM) LIFECYCLE: IT PROCUREMENT \geq \$250,000



ITIM LIFECYCLE (PROCUREMENT): SELECT

1. Select: Procurement Business Alignment: *Strategic entry for future IT Procurement*
2. The PBA step has been eliminated!
3. Proceed directly to the next step: Procurement Governance Request (PGR).

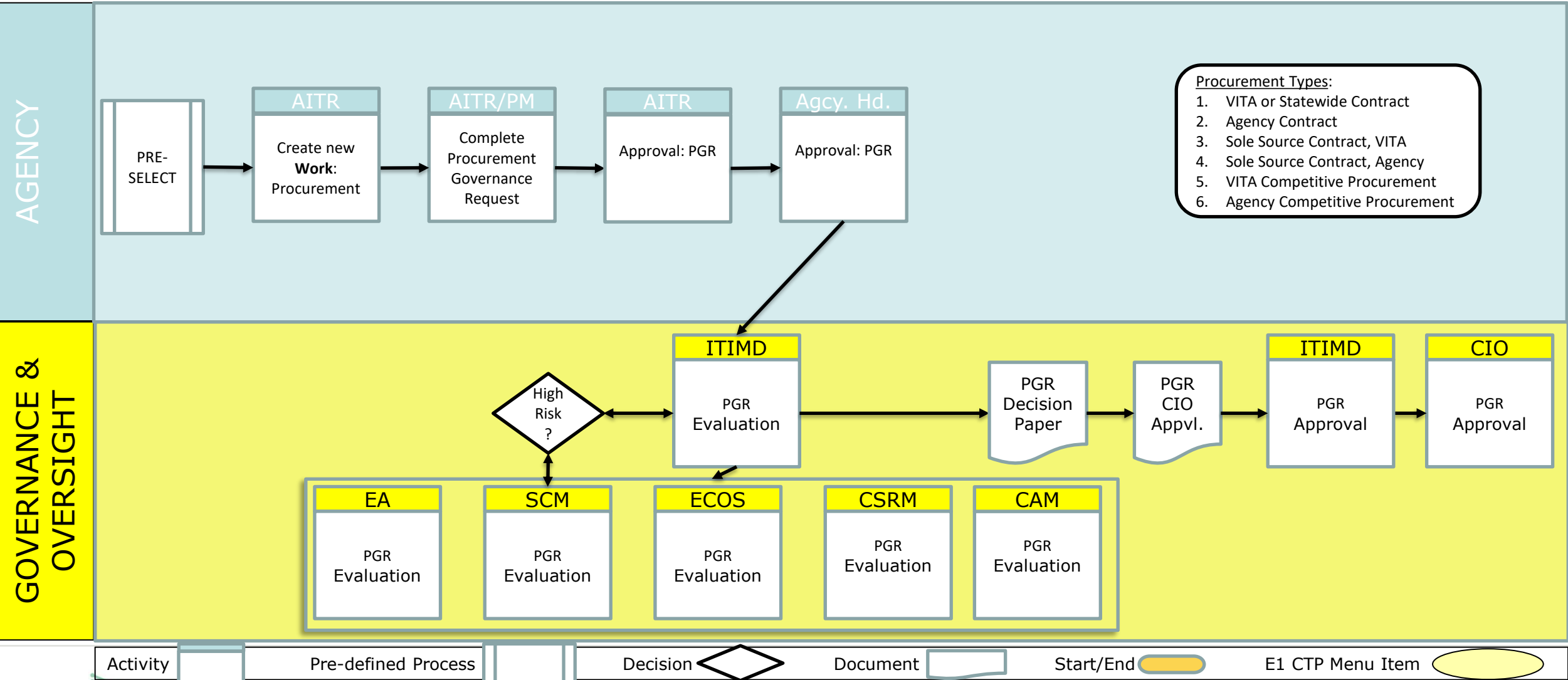
SELECT (PROCUREMENT)



ITIM LIFECYCLE (PROCUREMENT): CONTROL

1. Control: Procurement Governance Request: *Path to initiating IT Procurement activities*
2. Demonstration: Procurement Governance Request
3. Student Exercise: PGR
 - A. Student 01 - - - -> Student 01 Procurement
4. RFP: Request for Proposal (leading to an IT Contract)
5. IT Contracts

SELECT + CONTROL (PROCUREMENT GOVERNANCE)



Procurement Types:

1. VITA or Statewide Contract
2. Agency Contract
3. Sole Source Contract, VITA
4. Sole Source Contract, Agency
5. VITA Competitive Procurement
6. Agency Competitive Procurement

WORK MENU



- Work Portfolios

The screenshot displays the 'Work Menu' interface. At the top, a purple navigation bar contains the following tabs: 'My Overview', 'Timesheet', 'Work', 'Resources', 'Outcomes', 'Strategies', and 'more ...'. The 'Work' tab is highlighted with a yellow circle. Below the navigation bar, a grey header bar shows 'Work Portfolio' and 'PR - DSS Procurements' on the left, and 'View Portfolio View' on the right. The main content area is titled 'Work Menu' and is divided into three columns: 'Show', 'Select', and 'Action'. In the 'Show' column, the 'Work Portfolios' button is highlighted with a yellow circle. In the 'Select' column, a dropdown menu is set to 'Recently Visited Portfolios'. Below it, the 'PR - DSS Procurements' item, marked with an orange star, is highlighted with a yellow circle. Other items in the 'Select' column include 'PR - DMAS projects: ALL' (marked with an orange star) and 'Program Review-Monthly Category 1 - 2' (marked with a grey star). In the 'Action' column, the 'Portfolio View' action, represented by a document icon, is highlighted with a yellow circle. Other actions listed include 'Export as PowerPoint Timeline', 'Portfolio Definition', and 'Portfolio Members'.

Show	Select	Action
Work Portfolios	PR - DSS Procurements	Portfolio View
Work	PR - DMAS projects: ALL	Export as PowerPoint Timeline
	Program Review-Monthly Category 1 - 2	Portfolio Definition
		Portfolio Members

PORTFOLIO VIEW

- Work Portfolios

<div><div><div>←</div><div>★</div><div>⋮</div></div><div>Work Portfolio PR - DSS Procurements</div><div>View Portfolio View</div></div>					
57	36	57			
Portfolio Manager	Active Lifecycle Steps	Select RFP/ Contract or SOW Process	COVA Monthly Status Report (WRK14)	Portfolio Balance (WRK02)	
<div><div><div>2 Baseline Report ▼</div><div>Tree</div><div>List: Procurement</div><div>Group</div><div>Σ</div></div></div>					
		Name	Proponent Secretary	Proponent Agency	Investm
⋮	★	2-1-1 Virginia - Procurement	188 Secretary of He	765 Department	Un-As
⋮	★	Accuity - Procurement	188 Secretary of He	765 Department	Un-As
⋮	★	Adoption Records Microfiche Conversion-Procuremer	188 Secretary of He	765 Department	Un-As

FINANCIAL PLANNING DETAIL

- Type: Funding

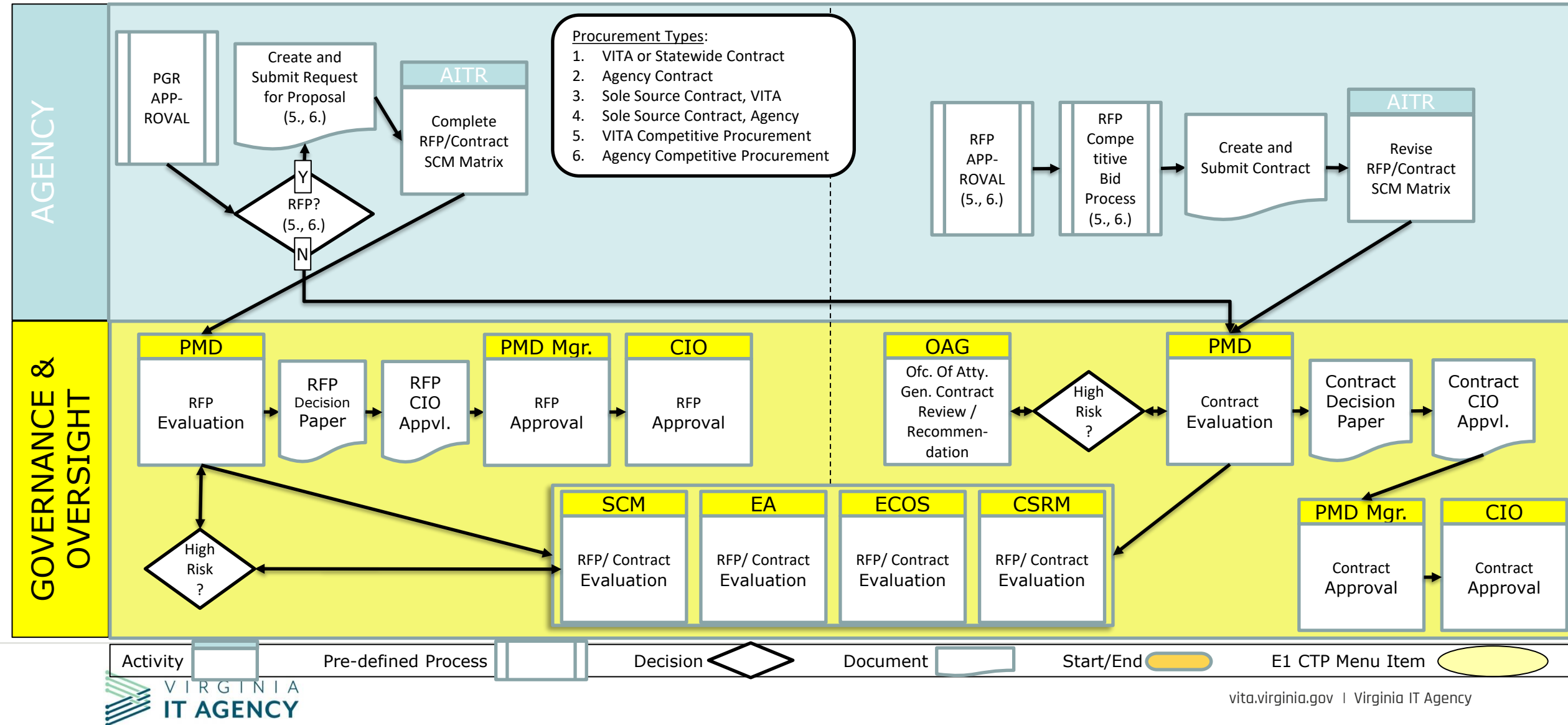
	▼ Description	Measures	Line Notes	2022	2023	Total
⋮	▼ >> GF Proposed IT Investments	USD				
⋮	>>> Major IT Projects	USD				
⋮	>>> Non-Major IT Projects	USD				
⋮	>>> Agency-Level IT Projects	USD				
⋮	>>> Major Stand Alone IT Procurement	USD		11,111.00	22,222.00	33,333.00
⋮	>>> Non-Major Stand Alone IT Procurement	USD				
⋮	>>> Agency-Level Stand Alone IT Procurement	USD				

FINANCIAL PLANNING DETAIL

- Type: Budget Plan - Costs

	▼ Description	Measures	Line Notes	2022	2023	2024	2025
⋮	▼ Type: Budget Plan - Costs	USD		1,234,567	1,234,567	1,234,567	1,234,567
⋮	> Internal Staff Labor	USD					
⋮	> Services	USD		1,234,567	1,234,567	1,234,567	1,234,567
⋮	> Software Tools	USD					
⋮	> Hardware	USD					

CONTROL/INITIATION (RFP/CONTRACT GOVERNANCE)




WRAP-UP

1. Help resources
2. Scenarios
3. Next Steps

SINGLE SIGN-ON (SSO)

- Use Chrome or Edge browser - - not IE!

virginia.okta.com/app/UserHome

 VIRGINIA IT AGENCY

Launch App


Home


Patrick


+ Add Apps


Work


+


 G Suite Mail


 G Suite Calendar


 planview™
Planview


 Microsoft Office 365 - VITA Teams

 G Suite Sites

 G Suite Account

 Microsoft Office 365 - VITA SharePoint Online

 servicenow.
ServiceNow Production

 servicenow.
ServiceNow Training