



# VIRGINIA IT AGENCY

**Commonwealth Technology Portfolio (CTP)**

CTP Training for IT Project Managers

Pat Reynolds

VITA Project Management Division

Version 8.0

# Welcome to CTP Training for IT Project Managers

## Welcome

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

# Commonwealth Technology Portfolio: Big Picture

1. CTP = Enterprise-wide repository for IT Investment Management (ITIM)
  1. IT Investments >\$250,000:
    1. IT Projects (new IT product or IT service (not O&M))
    2. IT Procurements
    3. 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 mostly used for Commonwealth governance and oversight purposes...
  1. CTP is adequate for day-to-day planning, execution and tracking progress on your project.
  2. However... you will likely have your own scheduling and budgeting tools – which is OK.
3. CTP satisfies the documentation, review and approvals for all phases of the IT Investment Management (ITIM) Lifecycle.
  1. CTP templates (investment business case, charter, risk mgt. plan, status report, etc.) help you to define and manage your project.

# ITIM Lifecycle: Agency Roles, Oversight & Governance Roles

AGENCY	<ul style="list-style-type: none"><li>• Project Manager (PM)</li><li>• Agency IT Representative (AITR)</li><li>• Business Sponsor (Bus. Spon.)</li><li>• Agency Head / representative (Agcy. Hd.)</li><li>• Secretariat Oversight Committee (SOC)</li></ul>
OVERSIGHT & GOVERNANCE	<ul style="list-style-type: none"><li>• Project Management Division Consultant (PMD)</li><li>• Project Management Division Manager (PMD Mgr.)</li><li>• IT Investment Management Division Consultant (ITIMD)</li><li>• Enterprise Architecture (EA)</li><li>• Supply Chain Management (SCM)</li><li>• Enterprise Cloud Oversight Service (ECOS)</li><li>• Commonwealth Security and Risk Management (CSRM)</li><li>• Customer Account Manager (CAM)</li><li>• Secretariat Oversight Committee (SOC)</li><li>• Commonwealth Chief Information Officer (CIO)</li></ul>

# 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

# ITIM Methodology for IT Projects (>\$250,000)



1.0 Pre-Select

2.0 Select

3.0 Control

3.0 Control: Initiation Phase

3.0 Control: Detailed Planning Phase

3.0 Control: Execution & Control Phase

3.0 Control: Closeout Phase

4.0 Evaluation

# CTP E1 Basic Navigation

## 1. Highlights

## 2. Login

## 3. Basic Navigation

- A. Primary Navigation Bar: “Banner”
- B. My Overview: ...is all about YOU
- C. Work View
  - i. Tabs, Ribbon, Tiles

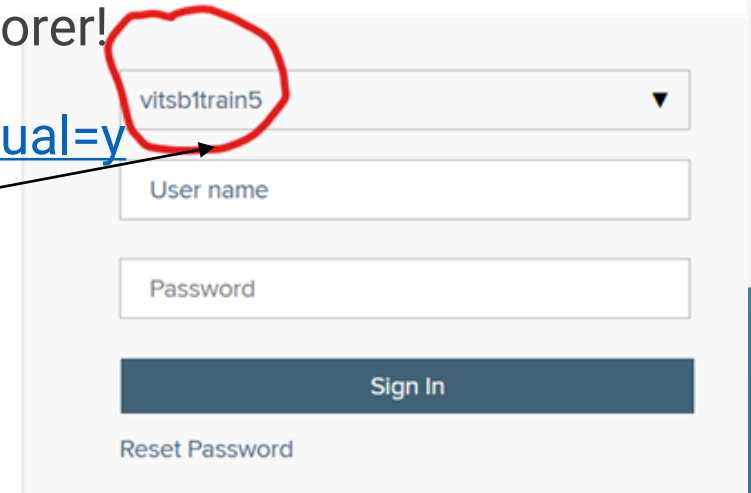


# CTP E1 Basic Navigation – cont'd

1. Action Menu
2. Lifecycle
3. Email Notification
4. Work Menu
5. Portfolio
6. 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.)



The screenshot shows a login interface with the following elements:

- A dropdown menu at the top with the text "vitsb1train5" selected. A red circle highlights this dropdown, and an arrow points from the text "VITSB1TRAIN5" in the list to it.
- A text box labeled "User name".
- A text box labeled "Password".
- A dark blue button labeled "Sign In".
- A link labeled "Reset Password" below the "Sign In" button.

# 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”

The screenshot shows the CTP E1 navigation interface. The top banner is dark blue with a light blue underline under the 'My Overview' menu item. The banner contains several tiles: 'Active Lifecycle Steps' (labeled '2'), 'My Scheduled Assignments' (labeled '1'), 'MY24 - My Assignments', 'Active Roles & LC Roles', 'My Action Items', 'My Active Change Requests', 'My Active Issues', 'My Active Risks', 'Next PGR Number to use', and 'more ...'. The 'My Overview' menu item is circled in yellow, and the 'Active Lifecycle Steps' tile is also circled in yellow. The 'My Overview' menu item is labeled 'Active Tile' and 'Tiles'. The 'My Overview' menu item is labeled '...banner...'. The 'My Overview' menu item is labeled 'ribbon...'. The 'My Overview' menu item is labeled 'Search' and 'My Account'. The 'My Overview' menu item is labeled 'Lifecyle Step', 'Work Item', and 'View Lifecycle'.

Annotations in the image include:

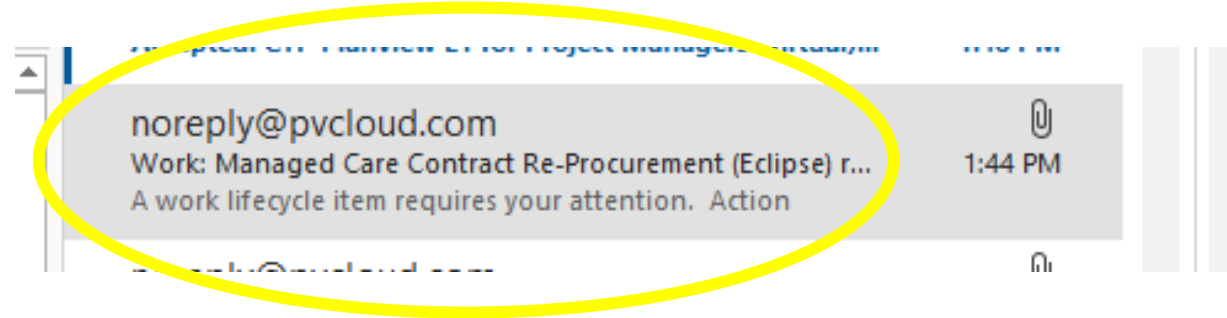
- Active Tile**: Points to the 'My Overview' menu item.
- Tiles**: Points to the 'My Overview' menu item.
- Search**: Points to the search bar in the top right.
- My Account**: Points to the user profile icon in the top right.
- ...banner...**: Points to the dark blue banner area.
- ribbon...**: Points to the horizontal bar containing the tiles.
- Lifecyle Step**: Points to the 'Enter Procurement Governance Request (PGR)' row in the table.
- Work Item**: Points to the 'Class Procurement' row in the table.
- View Lifecycle**: Points to the 'View Lifecycle' column in the table.

The table below shows the 'My Active Lifecycle Steps' data:

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 (PGR)	Class Procurement	Work	↻	Pat Reynolds		10/5/2022 1:22:50 PM	.		
!	Enter Scope	Class Project	Work	↻	Pat Reynolds		2/9/2022 10:24:38 AM	.		

RPM Tile: T105 - My Planview > Active Lifecycle Steps

# Email Notification



# Email Notification

Work: Managed Care Contract Re-Procurement (Eclipse) requires your attention



noreply@pvcloud.com  
To Reynolds, Patrick (VITA)

A work lifecycle item requires your attention.

**Action required**

Lifecycle item: [Enter PMD-Contract Recommendation](#)

[Go to Step](#)

**Other actions**

Work details: [Managed Care Contract Re-Procurement \(Eclipse\)](#)

Lifecycle diagram: [Managed Care Contract Re-Procurement \(Eclipse\)](#)



[Customer Success Center](#) | [Email Settings](#)

## Email Notification: Lifecycle Item

- Review Item
- Complete the action, such as: Approval checkbox + date stamp

covactp-sb.pvcloud.com/testing/ConfiguredScreens/ConfiguredScreen.aspx?code=26704&sid=35&cwfsid=193762&mode=RW&back=close

Project Class Project View IRC - Scope for Class Project

Save as Draft Save and Complete Cancel Review Lifecycle Step

\* Required Fields Collapse All

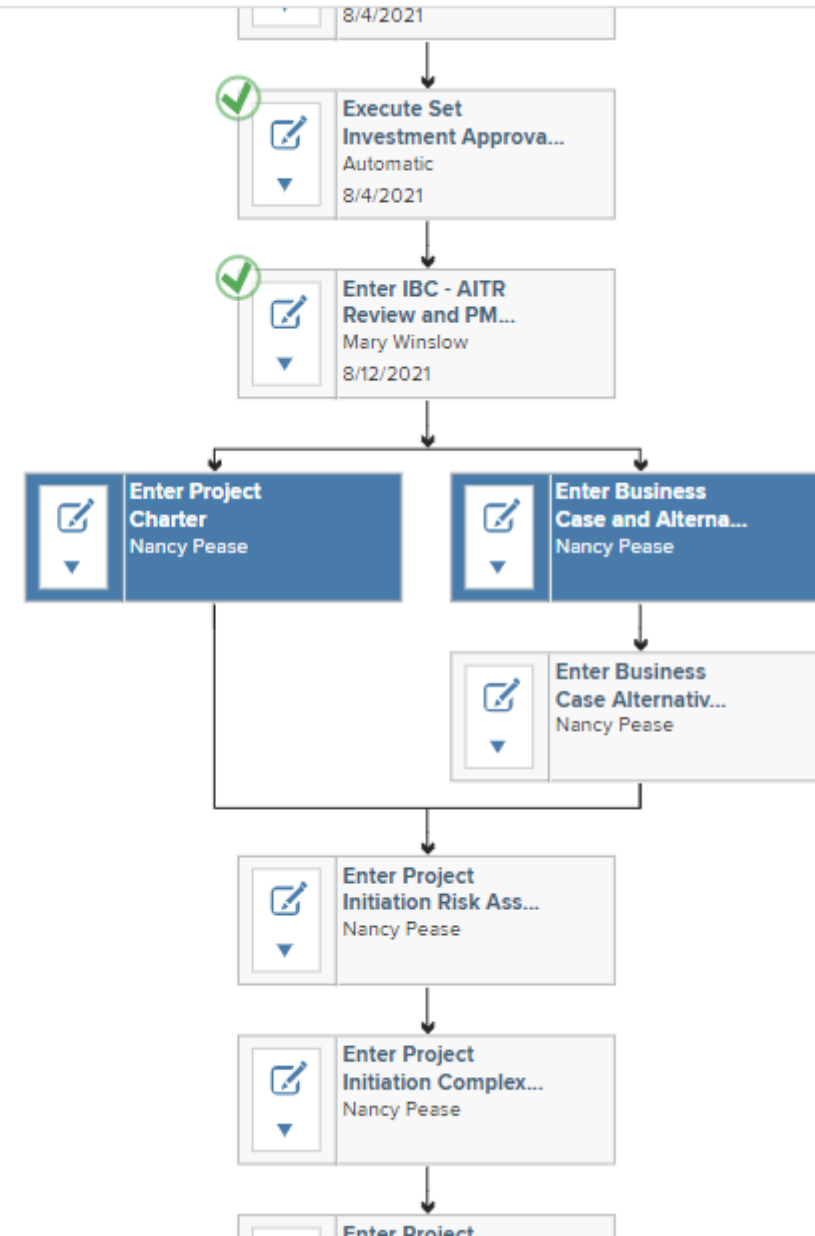
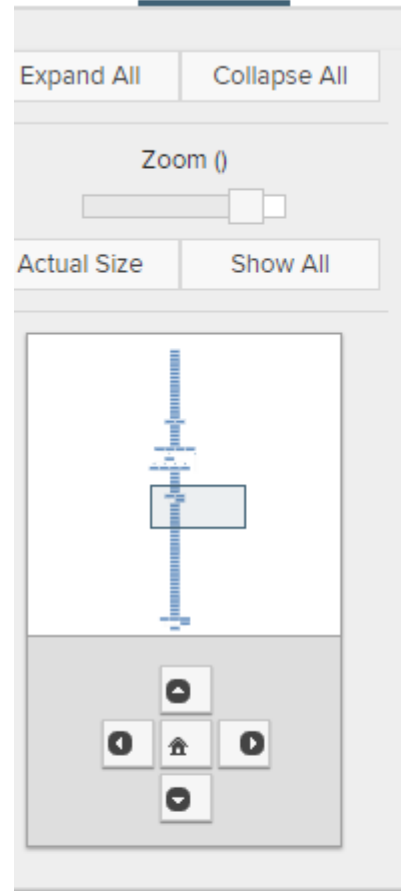
Scope

Scope

- “Save and Complete” - - this advances the item Lifecycle to the next step in the process.
- Or: “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, moving into Initiation phase.

## Top Tip: Active Lifecycle Steps

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

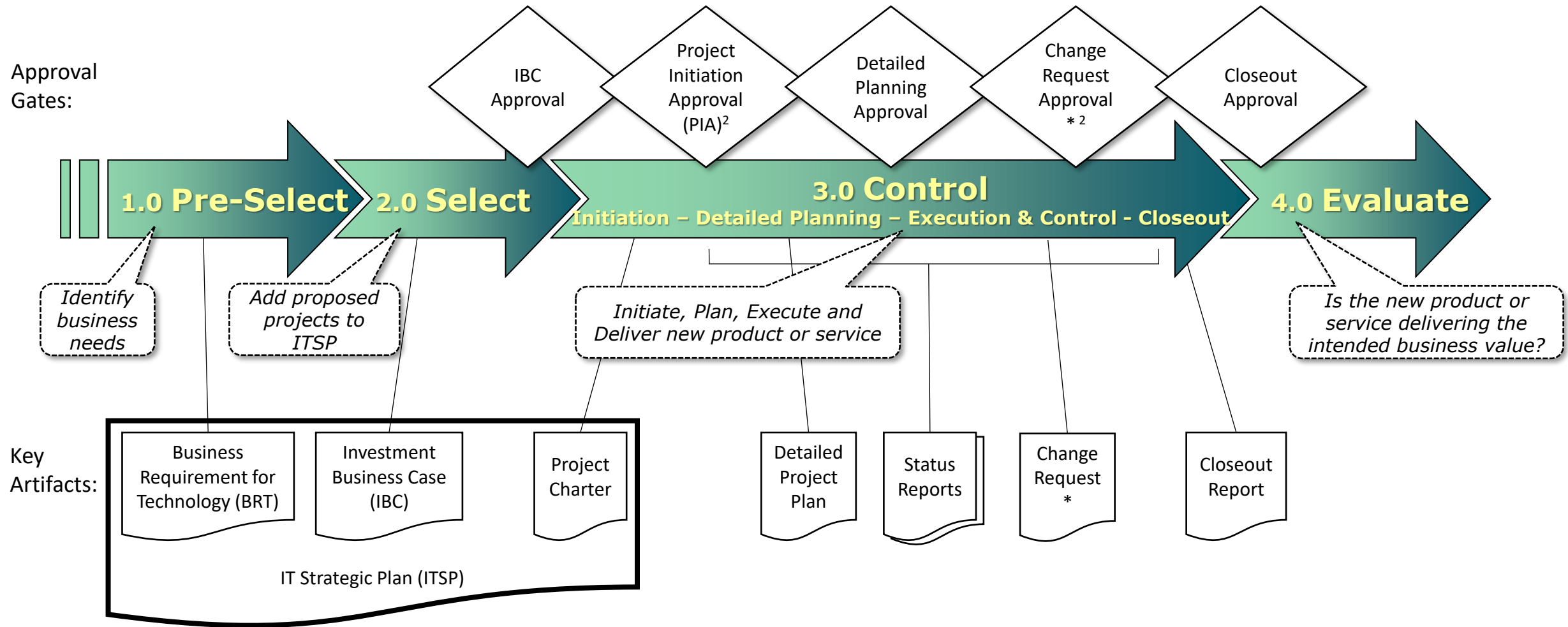
The screenshot displays the Planview Portfolios interface. The top navigation bar features the Planview Portfolios logo, a 'Menu Work' dropdown, and a 'Work Class Project' dropdown. Below this, a sub-navigation bar includes tabs for 'Work View', 'Plan', 'Dependencies', 'Staffing', 'Financials', 'Time Approval', and 'Attribute History'. The 'Work View' tab is selected. The main content area shows a dashboard with five tiles: 'Work Detail', 'Active Lifecycle Steps' (highlighted with a yellow circle and showing a count of 1), 'In Progress Timesheets' (showing 0), 'Unprogressed Timesheets', and 'COVA Monthly Project Status'. Below the dashboard, a table titled 'Active Lifecycle Steps' is visible. The table has columns for Status, Lifecycle Step, Entity, Type, View Lifecycle, and User. The first row shows a red status icon, the step 'Enter Scope', the entity 'Class Project', the type 'Work', a refresh icon, and the user 'Pat'. At the bottom, a footer bar reads 'RPM Tile: T106 - Portfolio > Active Lifecycle Steps'.

Status	Lifecycle Step	Entity	Type	View Lifecycle	User
!	Enter Scope	Class Project	Work	↻	Pat

RPM Tile: T106 - Portfolio > Active Lifecycle Steps



# IT Project Lifecycle: Key Approval Gates and Documentation



<sup>2</sup> Category 1-3 projects: SOC approval required

\* Change Request if needed

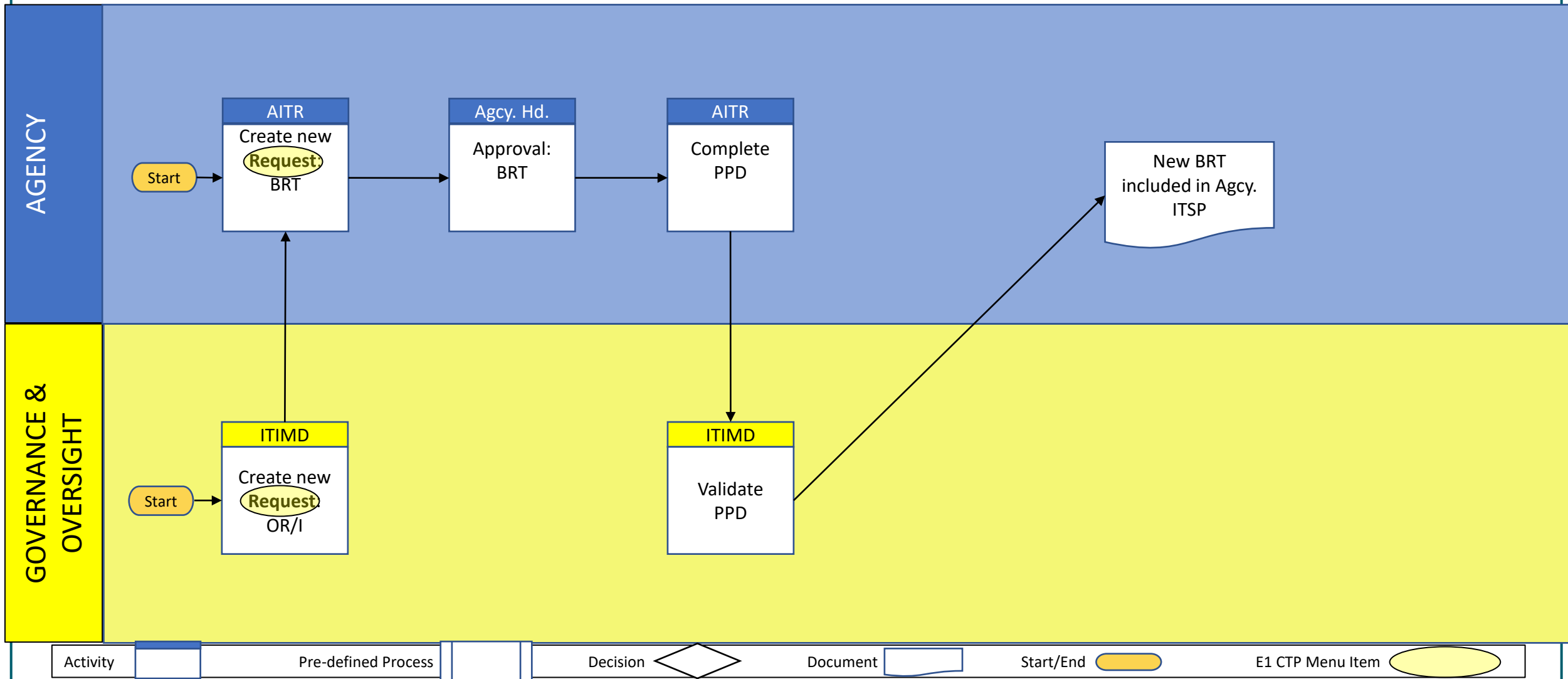
Key Approval Gates and Documentation reside in the Commonwealth Technology Portfolio (CTP)

# 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 = curated list of valid values
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"**

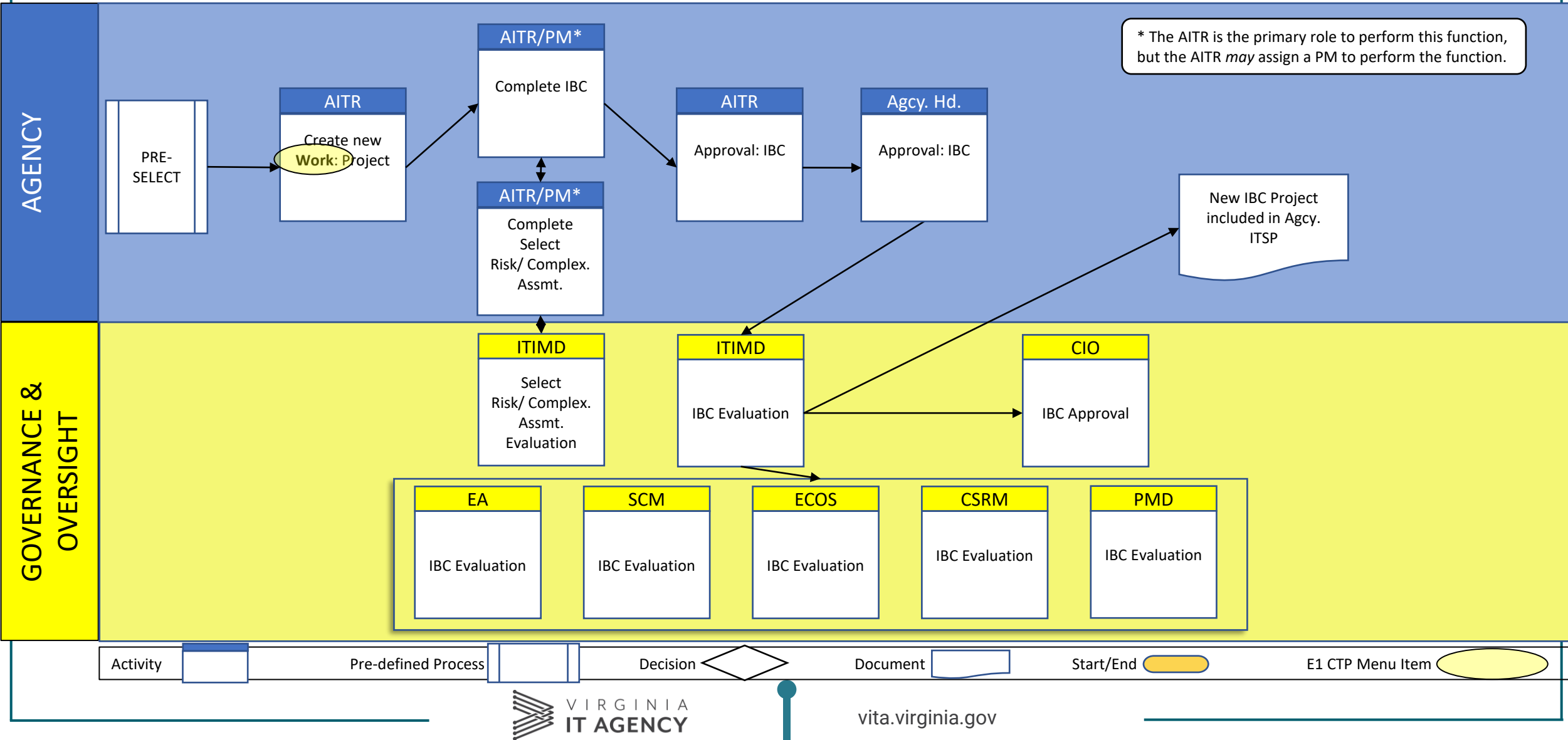
# 1.0 Pre-Select

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# 2.0 Select

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# Data Picker

- Allows only valid values

▼ Agency Approvals




AITR

Training Admin



Agency Head

Training Admin



▼ Initial Cost Estimate

# Find your Work Item

- Click on:
- Planview Portfolio
- Menu > Work
- Work > Student 01 Project
- ...or do a keyword search

The screenshot shows the Planview Work Class Project interface. The top navigation bar includes the Planview logo (circled in yellow), a 'Menu Work' dropdown (circled in yellow), and a 'Work Class Project' dropdown (circled in yellow). On the right, there is a 'New' button and a search bar (circled in yellow) with a magnifying glass icon and the text 'Search'. Below the navigation bar, the main content area is divided into sections. The '2.0 Select' section is highlighted in dark teal. Below it, the 'General Information' section is highlighted in light green. This section contains the following information:

- Planned Initiation Start Date:** 2/9/2022
- Planned Completion Date:** 2/24/2022
- AITR:** Training Admin

A dropdown menu is open from the 'Work Class Project' dropdown, showing a list of 'RECENTLY VIEWED PORTFOLIOS' and 'RECENTLY VIEWED WORK'. The 'Class Project' item under 'RECENTLY VIEWED WORK' is highlighted with a blue background and a yellow circle.

**RECENTLY VIEWED PORTFOLIOS**

- Training Portfolio (Shared)
- PR - DMAS Procurements
- Program Review-Monthly Category 1 - 2
- Program Review-Quarterly Category 1 - 3
- PR - DMAS projects: ALL
- See All Work Portfolios (19)

**RECENTLY VIEWED WORK**

- Class Project**
- Class Procurement
- Student 01 Project

# Sub-menu

- Typical menu items:

The screenshot displays a software interface with a red header bar. The header bar contains the following items: a grid icon, 'Planview Portfolios', a 'Menu Work' dropdown, a 'Work Class Project' dropdown, a '+ New' button, a search icon, a book icon, and a 'PR' button. Below the header bar is a menu bar with the following items: 'Work View', 'Plan', 'Dependencies', 'Financials', 'Attribute History', 'Lifecycle', 'Changes', 'Risks', 'Issues', 'Associated Strategies', 'Associated Requests', '2.0 Select', '3.0 Control', and a hamburger menu icon. The 'Work View' and 'Plan' items are circled in yellow. The 'Dependencies' item is crossed out with a yellow X. The 'Financials' item is circled in yellow. The 'Attribute History' item is crossed out with a yellow X. The 'Lifecycle' item is circled in yellow. The 'Changes' item is circled in yellow. The 'Risks' item is circled in yellow. The 'Issues' item is circled in yellow. The 'Associated Strategies' item is crossed out with a yellow X. The 'Associated Requests' item is crossed out with a yellow X. The '2.0 Select' item is circled in yellow. The '3.0 Control' item is circled in yellow. The hamburger menu icon is circled in yellow. A dropdown menu is open for the '3.0 Control' item, showing a search bar and a list of sub-items. The sub-items are: 'COV Project Status Summary', 'IBC Approval Notification', 'Lessons Learned', 'PMD Billing Data', 'PMD Clear Data', 'PMD Configuration', 'Prepare for Closure', 'Project CIO Approval Status', 'Project Status Help', 'Sponsor Status Approval', and 'VITA Approvals'. The 'Prepare for Closure' item is circled in yellow.

Planview Portfolios | Menu Work > Work Class Project

Work View Plan Dependencies Financials Attribute History Lifecycle Changes Risks Issues Associated Strategies Associated Requests 2.0 Select 3.0 Control

Work Detail Active Lifecycle Steps In Progress Timesheets Unprogressed Timesheets COVA Monthly Project Status Agency Project Status Report Financial Analysis (WRK31) Financial Burndown Comparison

Active Lifecycle Steps

Status	Lifecycle Step	Entity	Type	View Lifecycle	User Responsible	Lifecycle Role	Activated On	Rejected
!	Enter Scope	Class Project	Work		Pat Reynolds		3/28/2024 2:05:35 PM	

RPM Tile: T106 - Portfolio > Active Lifecycle Steps

COV Project Status Summary

IBC Approval Notification

Lessons Learned

PMD Billing Data

PMD Clear Data

PMD Configuration

Prepare for Closure

Project CIO Approval Status

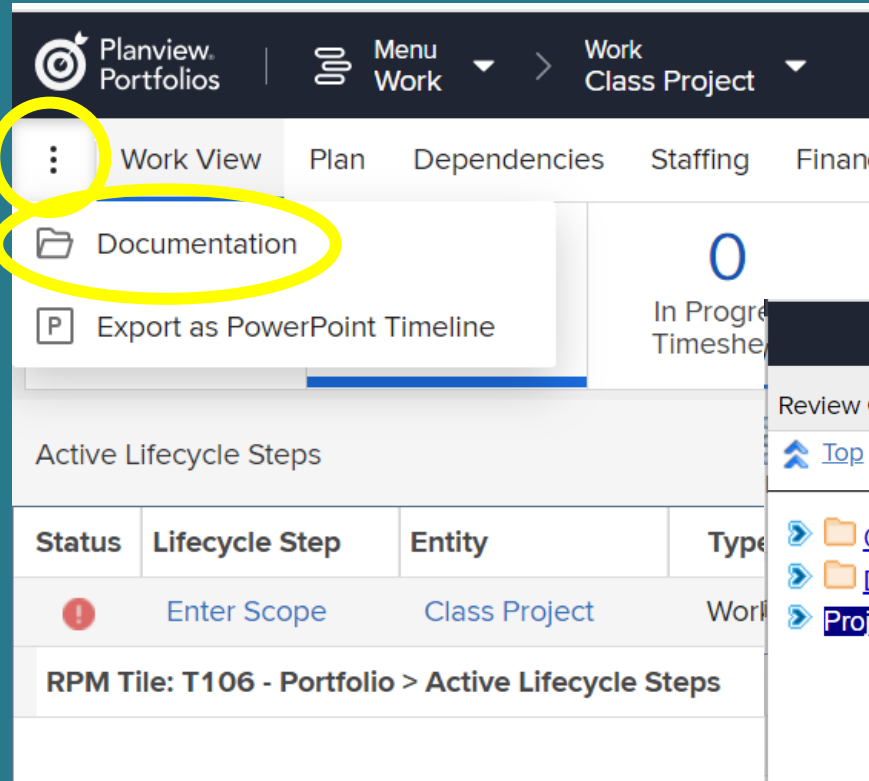
Project Status Help

Sponsor Status Approval

VITA Approvals

# Document Repository

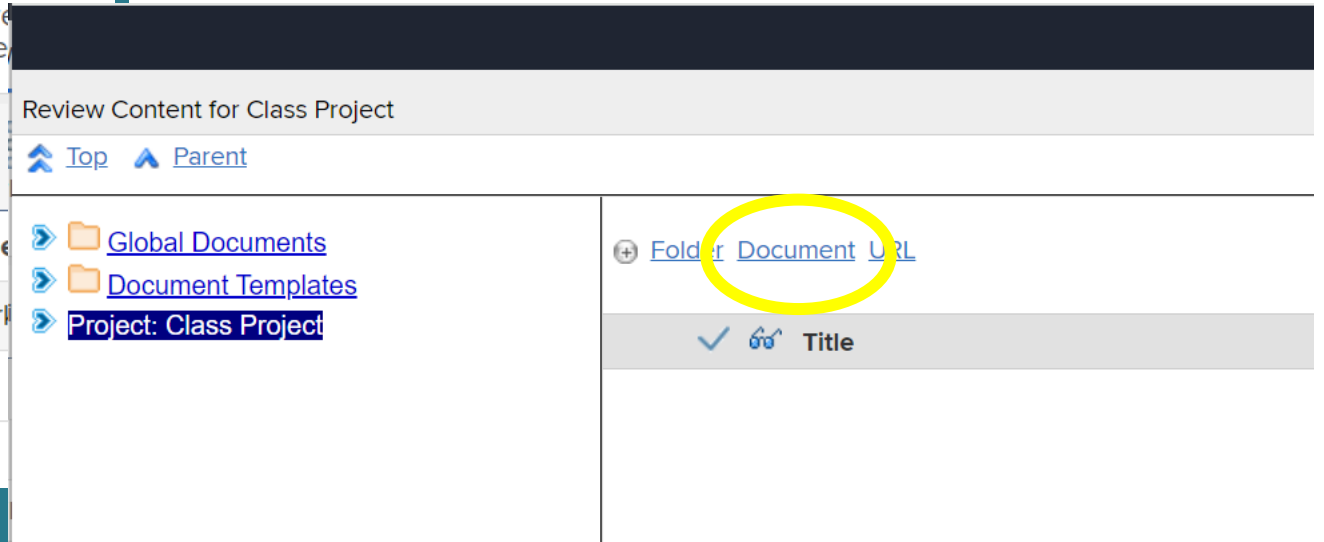
24



The screenshot shows the Planview Portfolios interface. The top navigation bar includes 'Planview Portfolios', 'Menu Work', and 'Work Class Project'. Below this, a secondary navigation bar contains 'Work View', 'Plan', 'Dependencies', 'Staffing', and 'Financial'. The 'Work View' tab is selected, and its dropdown menu is open, showing 'Documentation' (highlighted with a yellow circle) and 'Export as PowerPoint Timeline'. The main content area displays 'Active Lifecycle Steps' with a table showing 'Enter Scope' as a lifecycle step for the 'Class Project' entity. A banner at the bottom reads 'RPM Tile: T106 - Portfolio > Active Lifecycle Steps'.

Status	Lifecycle Step	Entity	Type
!	Enter Scope	Class Project	Work

RPM Tile: T106 - Portfolio > Active Lifecycle Steps



The screenshot shows the 'Review Content for Class Project' page. It includes links for 'Top' and 'Parent'. Below these, there are three links: 'Global Documents', 'Document Templates', and 'Project: Class Project'. On the right side, there is a section titled 'Folder Document URL' (highlighted with a yellow circle) with a 'Title' column and a checkmark icon.

Review Content for Class Project

[Top](#) [Parent](#)

- [Global Documents](#)
- [Document Templates](#)
- [Project: Class Project](#)



Folder Document URL

✓ [Title](#)



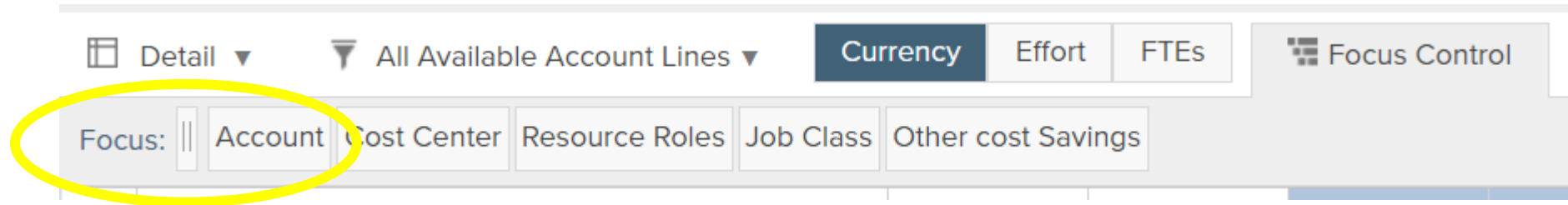
# Financials

- Clean up your view

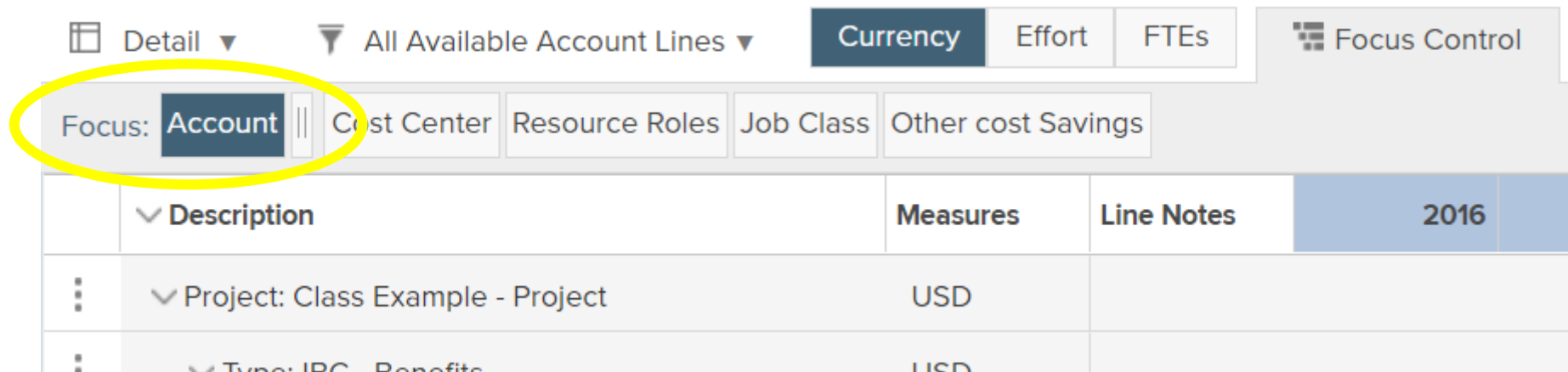
Project Class Example - Project		View Financial Planning Detail								
 Detail ▾	 All Available Account Lines ▾	Currency	Effort	FTIs	Focus Control		Add a Line		Enter text to filter grid	
Description		Measures	Line Notes	2016	2017	2018	2019	2020	2021	202
Project: Class Example - Project		USD								
> 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								

# Financials

- Focus Control
  - From this...



- To this...



# Financials

- Display Preferences
  - From this...

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

Version  
Actual/Forecast (forecast) ▼

Enter text to filter grid

Months ▼

2018 2019 2020 2021 2022 2023 2024 2025

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

# Financials

- 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  
☐ Actual/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.

# Financials

- 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	

# Financials

- Major IT Project, General Funds

☆

Project

Class Example - Project

View

Financial Planning Detail

Detail ▾

▾

All Available Account Lines ▾

Currency

Effort

FTEs

▮

Focus Control

⊞

Add a Line

	▼ 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				

# Financials

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

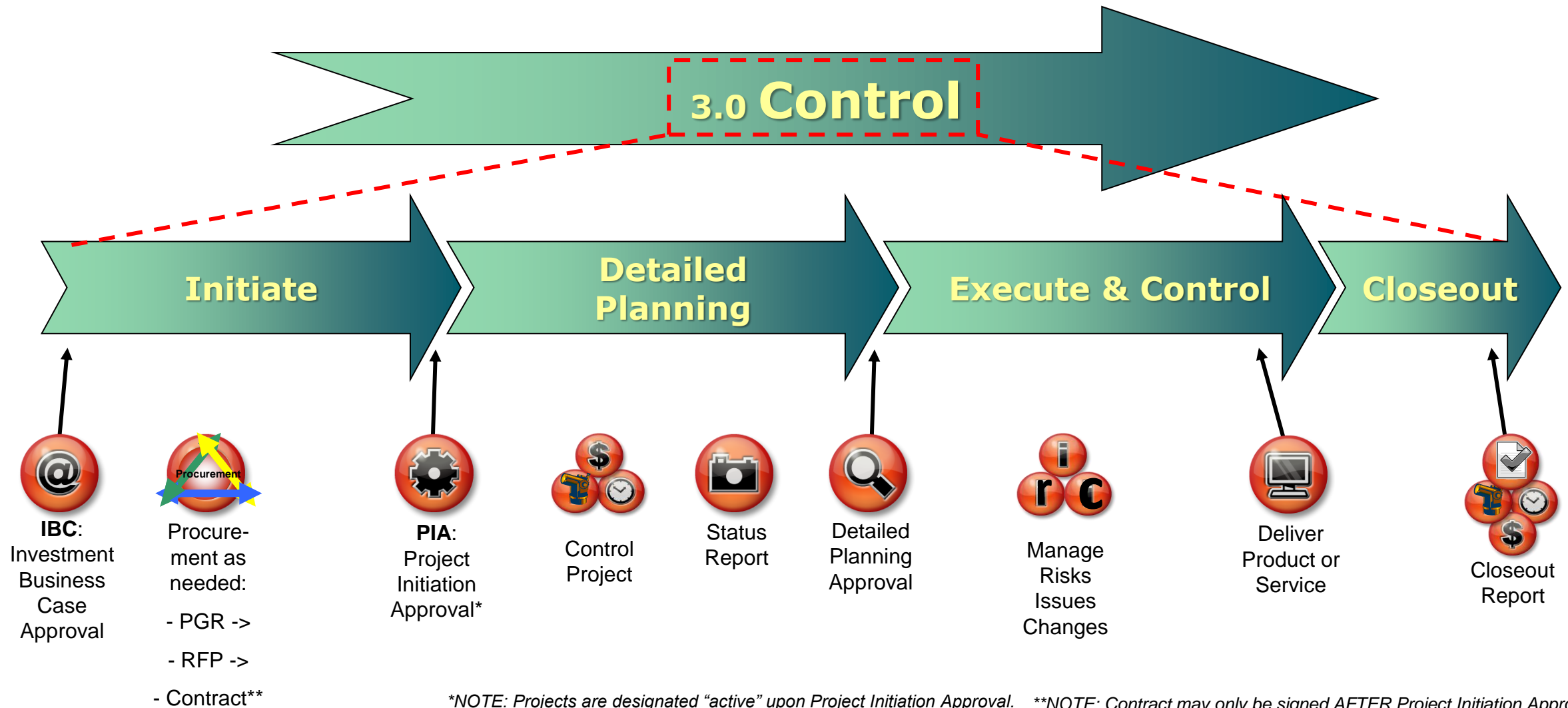
Class Example - Project		Financial Planning Detail				
Detail ▼	All Available Account Lines ▼	Currency	Effort	FTEs	Focus Control	Add a Line
	▼ Description	Measures	Line Notes	2022	2023	Total
⋮	▼ > Non General Funds	USD				
⋮	>> NGF Current IT Services	USD				
⋮	▼ >> NGF Proposed IT Investments	USD				
⋮	>>> 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. Business Case & Alternatives Analysis (BCAA)
3. Cost-Benefit Analysis (CBA)
4. Project Charter
5. Plan (Schedule)
6. Financials
7. Student Exercise: Project Initiation: Build upon ‘Student 01’ Project...

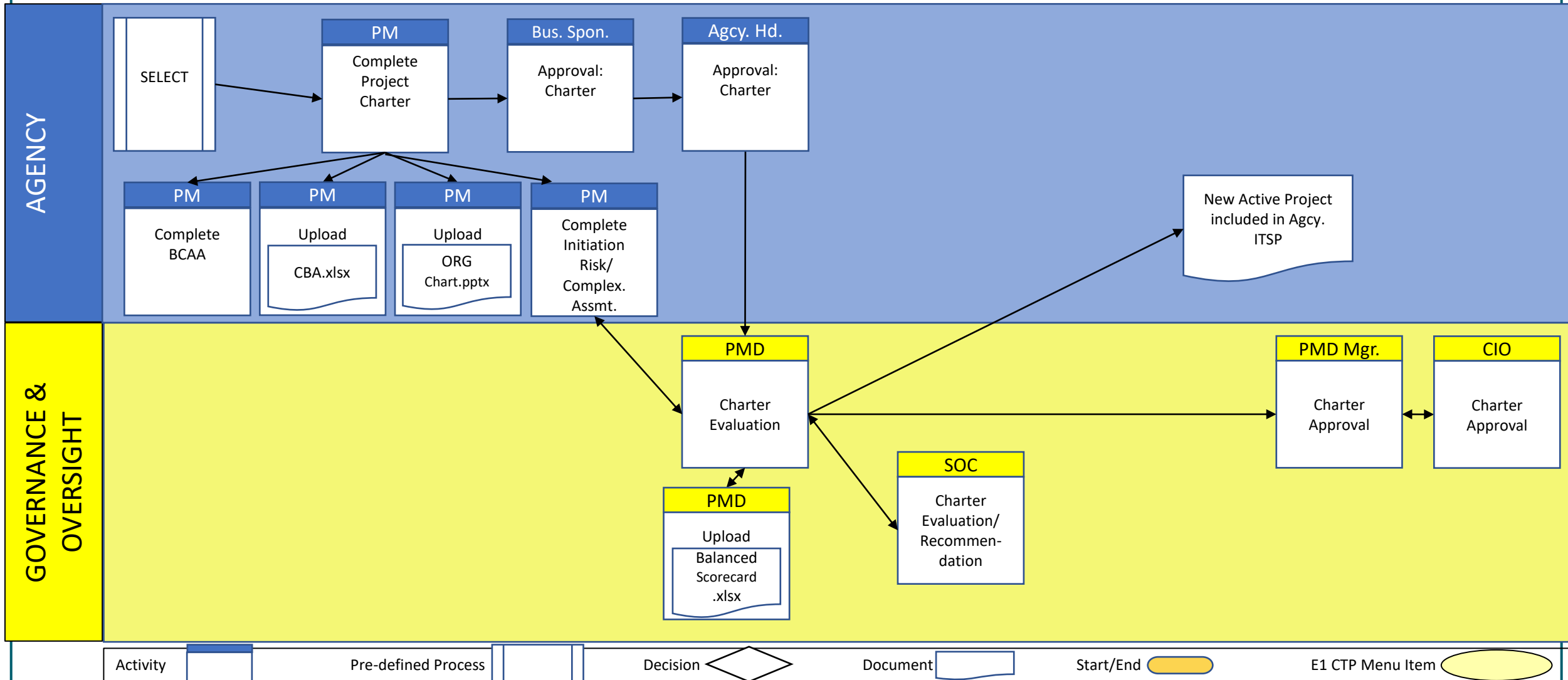


# CPM Methodology Within The ITIM Lifecycle



# 3.0 Control/Initiation (Project)

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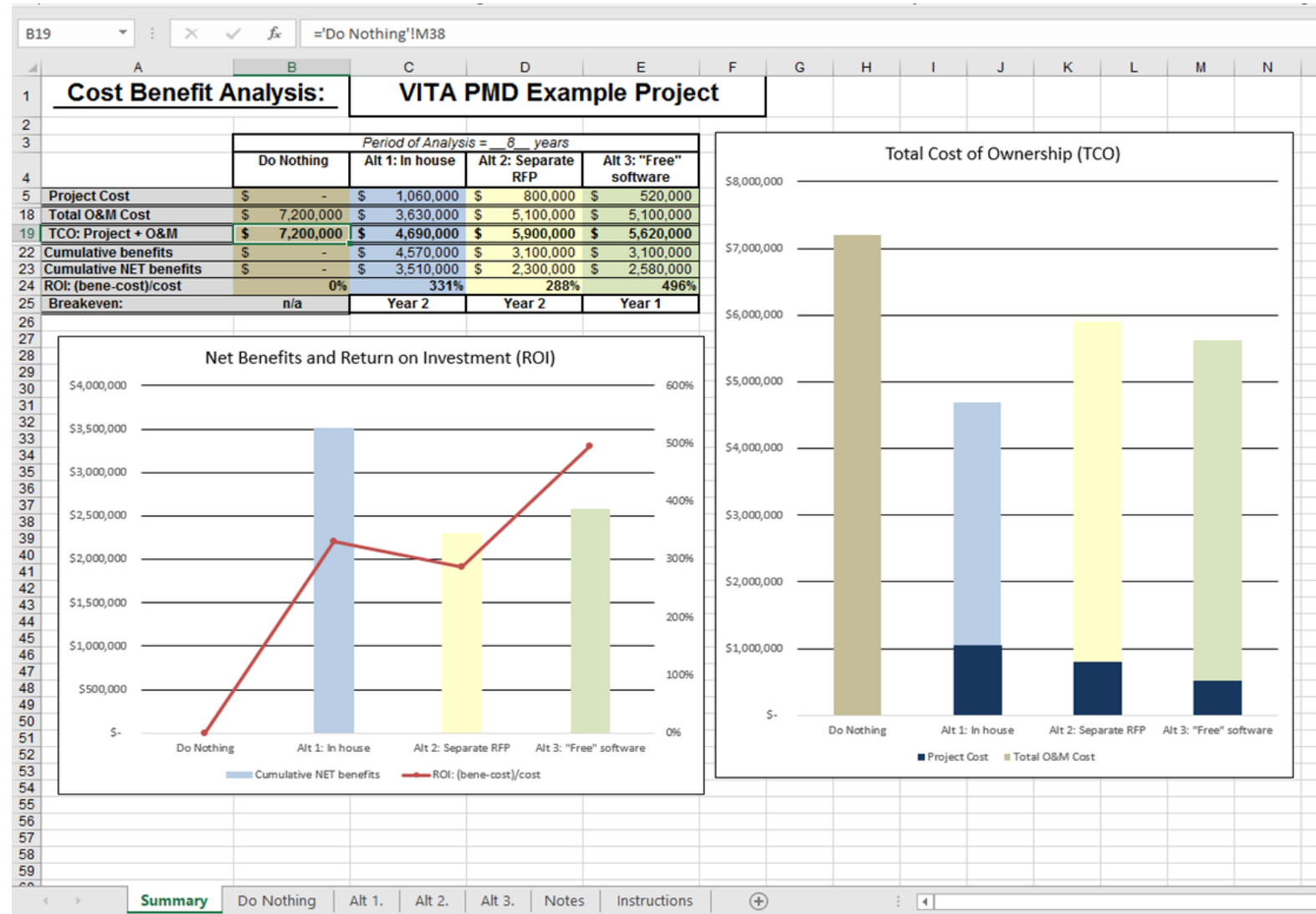


# Initiation: Differences by Project Category

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)

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# Financials

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- 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			

# Plan

- 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

# Plan

- 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				

# Plan

- Reveal / Hide Columns

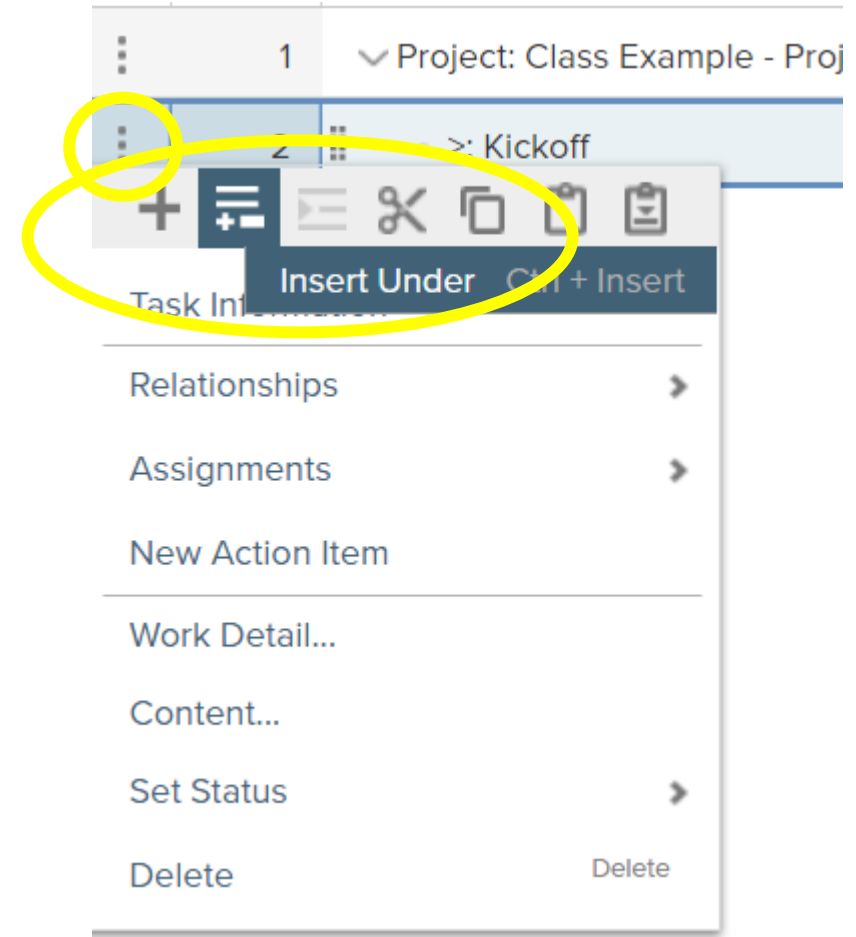
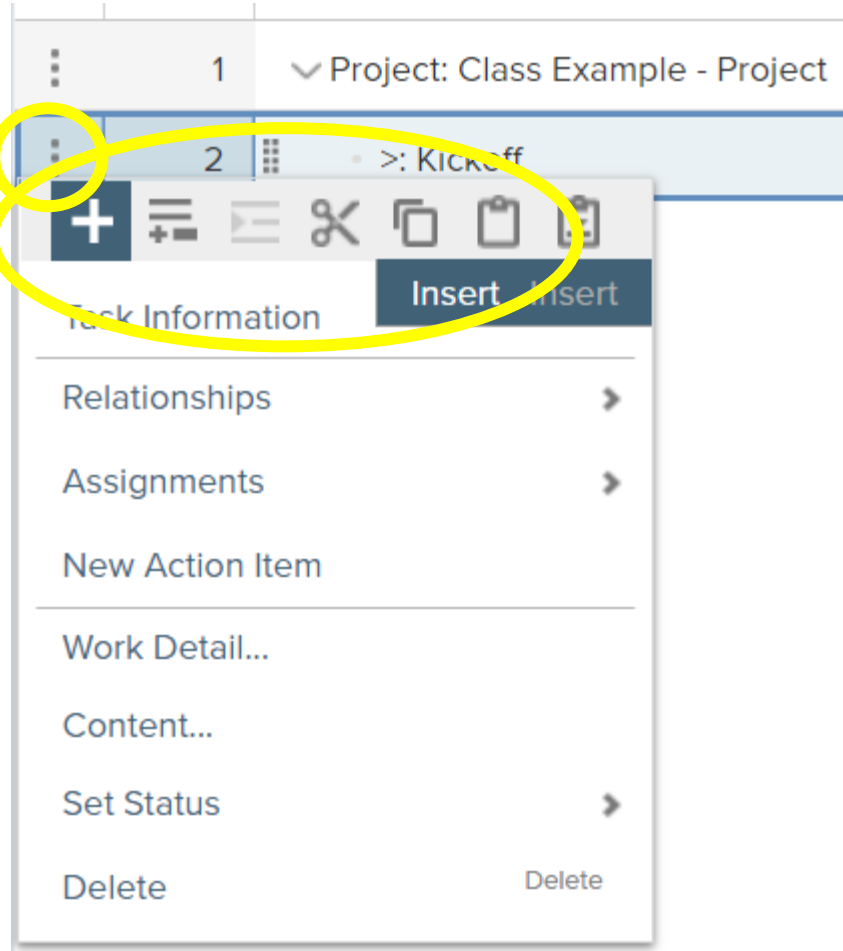
The screenshot shows a project schedule table with columns: Line #, Name, Work Status, and Schedule Start. The table contains two rows: Line # 1, Name 'Project: Class Example - Project', Work Status 'Requested', and Line # 2, Name '>: Kickoff', Work Status 'Requested'. A yellow circle highlights the 'Work Status' and 'Schedule Start' columns. A red box labeled 'Right Click' points to the 'Work Status' column. A red box labeled 'Select Columns' points to a context menu that is open, showing a list of columns with checkboxes: Line #, Name, Work Status (checked), Schedule Start (checked), Duration (checked), and Schedule Finish (checked).

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



# Plan

- Tasks: Insert, Insert Under

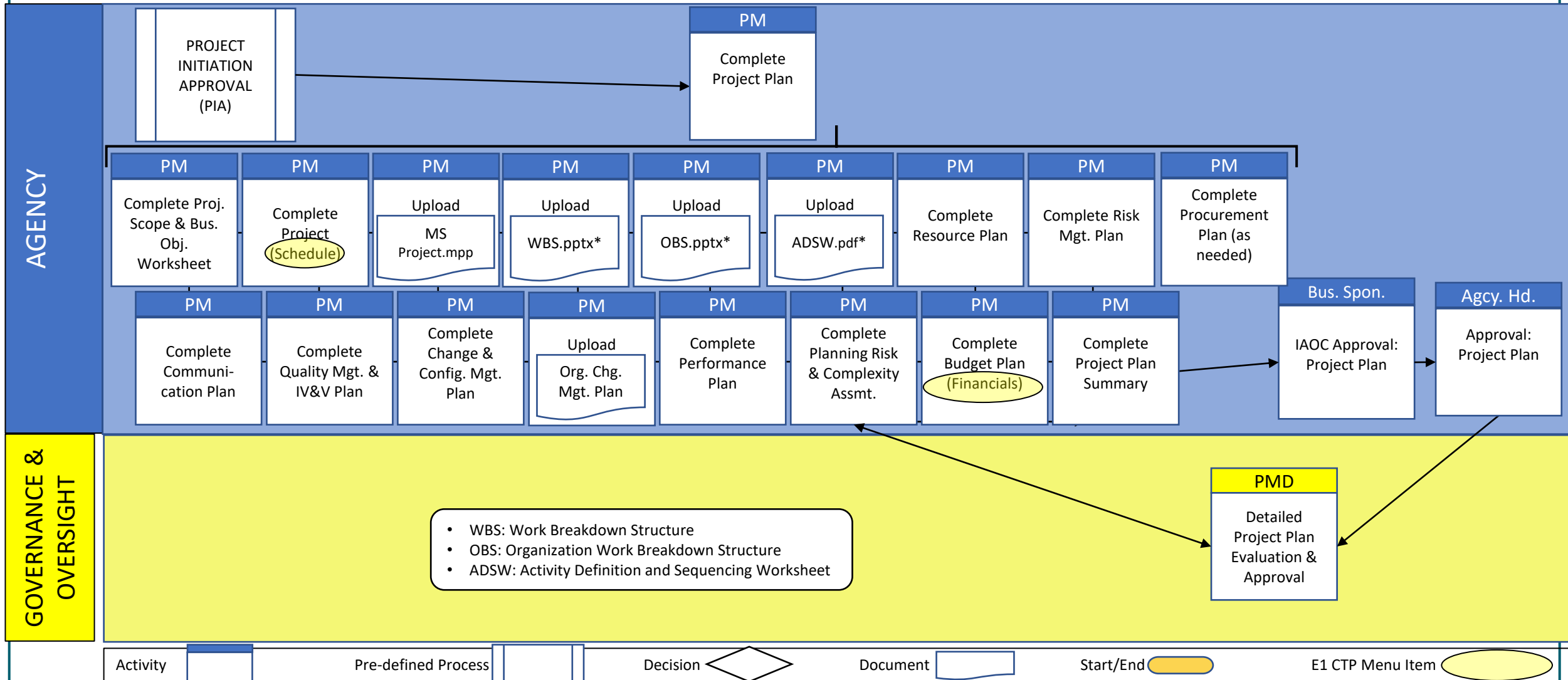


# ITIM Lifecycle: 3.0 Control: Detailed Planning

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: Plan
4. Demonstration: Financials
5. Student Exercise (optional): Project Detailed Planning
  1. Project Schedule: Plan
  2. Financials

# 3.0 Control/Detailed Planning (Project)

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# Detailed Planning: Differences by Project Category

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

## Detailed Planning: Differences by Project Category (Page 2)

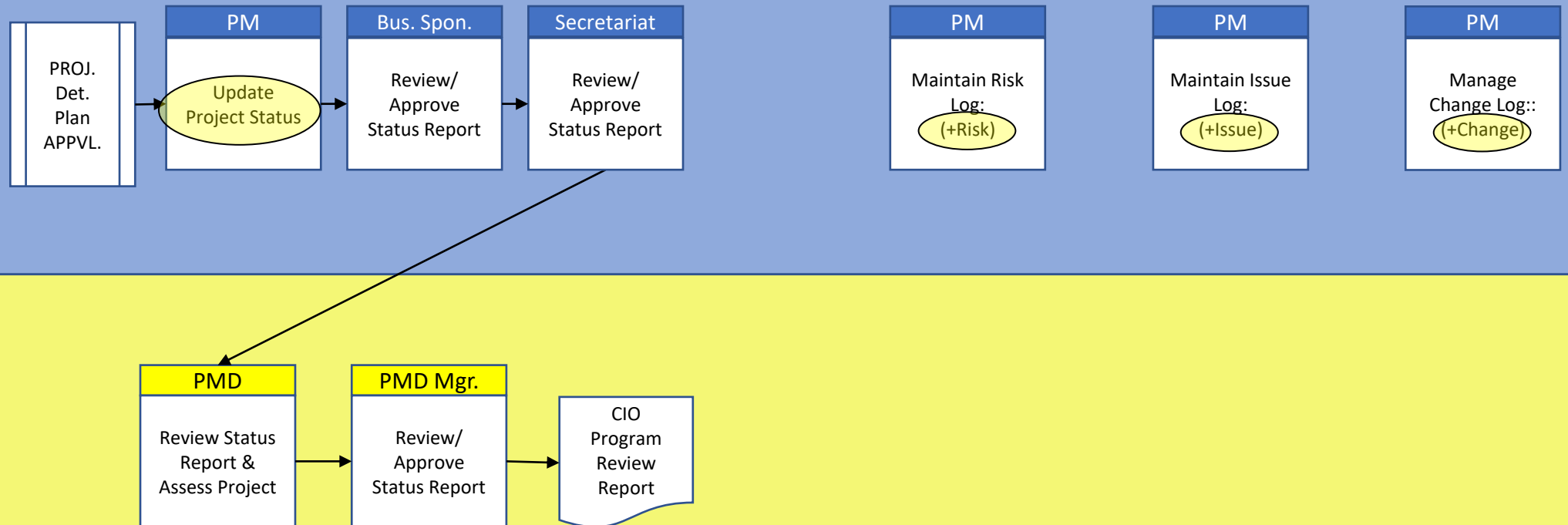
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REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Quality Management & IV&V Plan	Required	Required	Required	Optional
Change & Configuration Management Plan	Required	Required	Required	Optional
<i>Organization Change Management Plan</i>	Required	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

## 3.0 Control/Execution & Control (Project)



Activity

Pre-defined Process

Decision

Document

Start/End

E1 CTP Menu Item

# Execute & Control: Differences by Project Category

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&amp;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 &amp; 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 $\leq$ 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

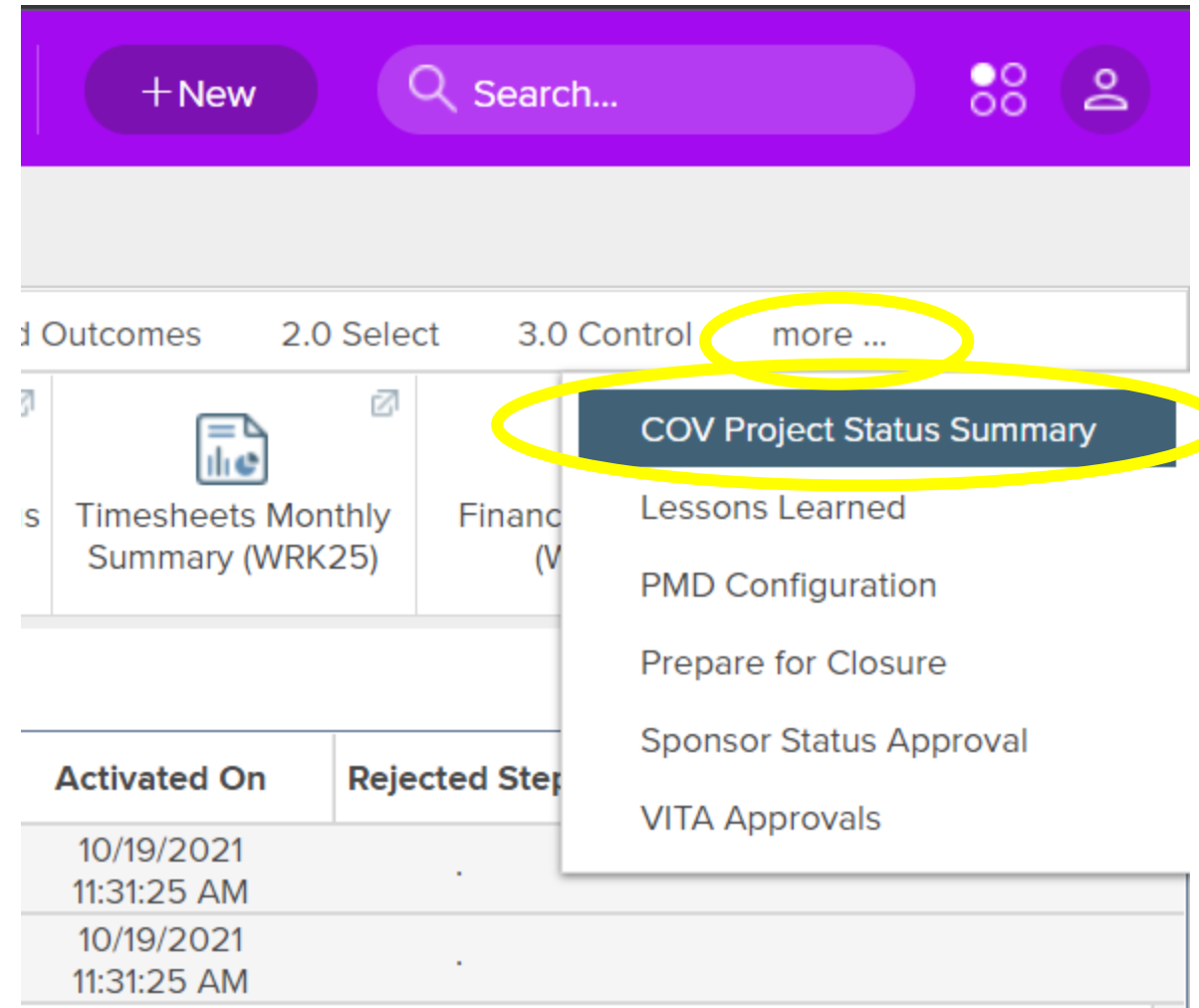


# COV Project Status Summary

- 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
- Financials Update
- Plan (Schedule) Update
- PM Comments
- <<Project Sponsor Assessment>>
- <<Secretariat Status Assessment>>



## Project Status: Financials

- 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						



# Change Control

- Changes + Change

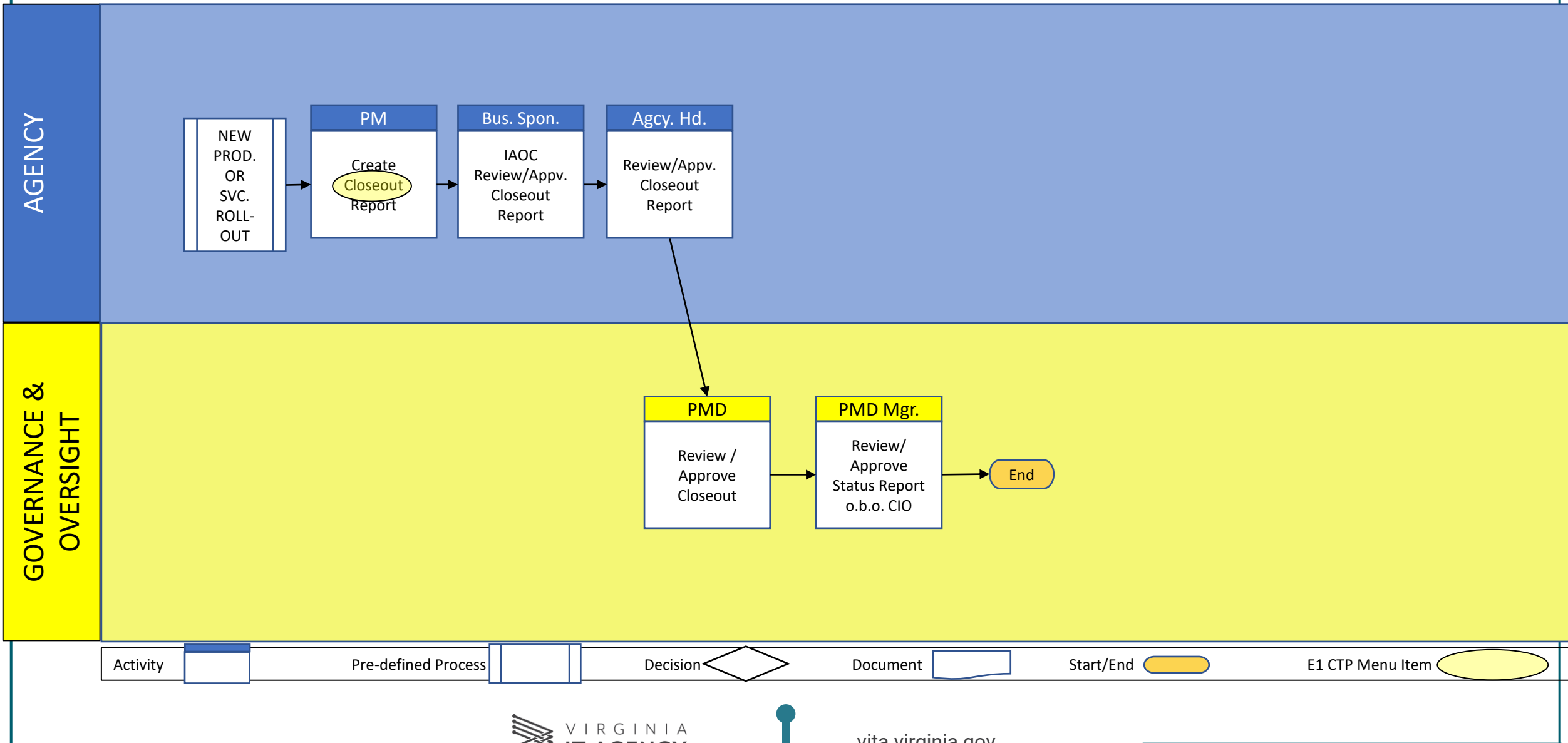
The screenshot displays the Planview Enterprise One interface. At the top, the breadcrumb navigation shows 'Project > Class Example - Project > Work View'. Below this, a horizontal menu contains 'Overview', 'Lifecycle', 'Notifications', 'Work Effort', 'Changes', 'Risks', and 'Issues'. The 'Changes' tab is selected and highlighted with a yellow circle. On the left side of the 'Changes' tab, there is a '+ Change' button, also circled in yellow. Below the menu, a table header is visible with columns 'ID', 'Name', 'Priority', and 'Status'. A modal window titled 'New Change - Planview Enterprise One - Portfolio and Resource Management - Google Chrome' is open, showing the URL 'covactp-sb.pvcloud.com/testing/CRI/AddEditCri.aspx?ct=C&pt=PROJECT&el=...'. The modal has a purple header bar and a 'New Change' button circled in yellow. Below the button is a 'Basic Info' section with the following fields: 'Work Item' (Class Example - Project), 'Name' (empty), 'ID' (C-25667), 'Status' (Open with a dropdown arrow), 'Priority' (Medium with a dropdown arrow), and 'Description' (empty).

## 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)

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# Closeout: Differences by Project Category

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

## ITIM Lifecycle: 4.0 Evaluation

1. PMs normally do not do this phase.
2. However, the Project Sponsor is responsible for the PIR, and you might be involved in this.
3. Evaluation phase consists of conducting Post-Implementation Review, (PIR) and uploading results into CTP.
4. 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?”*
5. May lead to opportunities for improvement

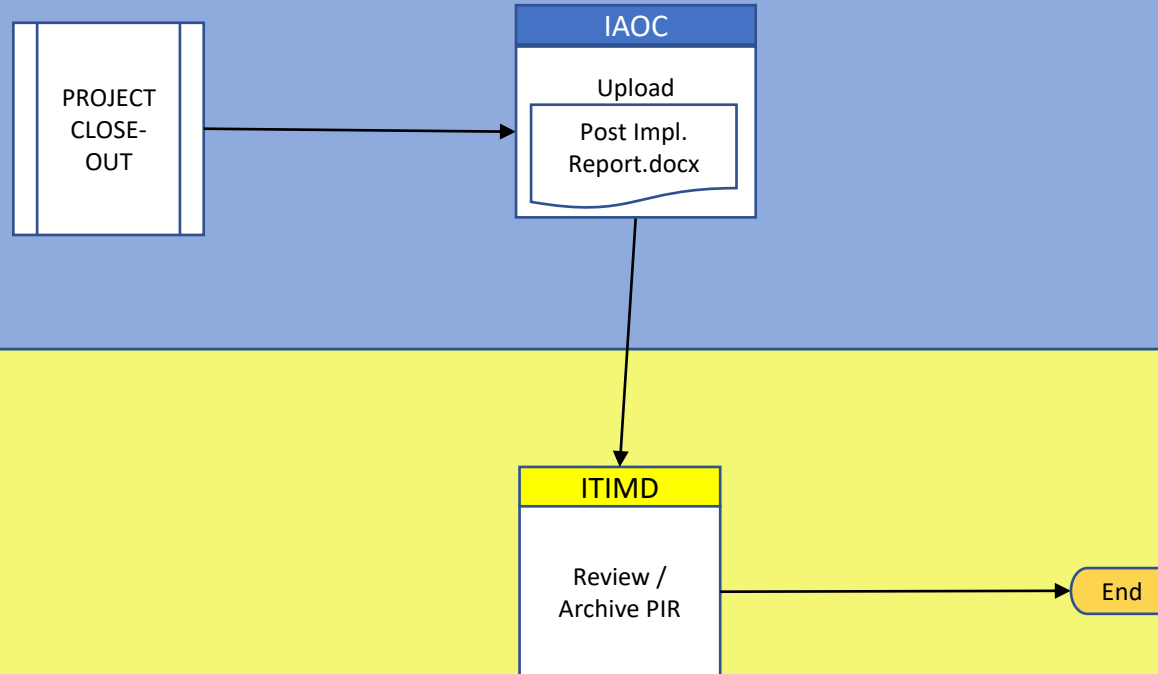


## 4.0 Evaluation (Project)

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AGENCY

GOVERNANCE &  
OVERSIGHT



Activity

Pre-defined Process

Decision

Document

Start/End

E1 CTP Menu Item

## ITIM Methodology for IT Procurements ( $\geq \$250,000$ )

1. Just like IT Projects, IT Procurements  $> \$250,000$  require Governance & Oversight
2. The ITIM Lifecycle is administered through CTP:
  1. BRT: AITR, Agency Head approval
  2. PGR: AITR, Agency Head approval, VITA SME review, CIO approval
  3. RFP: ( $\geq \$1M$ ) VITA SME review, CIO approval
  4. Contract: ( $\geq \$1M$ ) OAG review, VITA SME review, CIO approval
  5. SOW: ( $\geq \$1M$ ) VITA SME review, CIO approval

The Process takes time!  
Plan Accordingly!



# Select + Control (Procurement Governance)

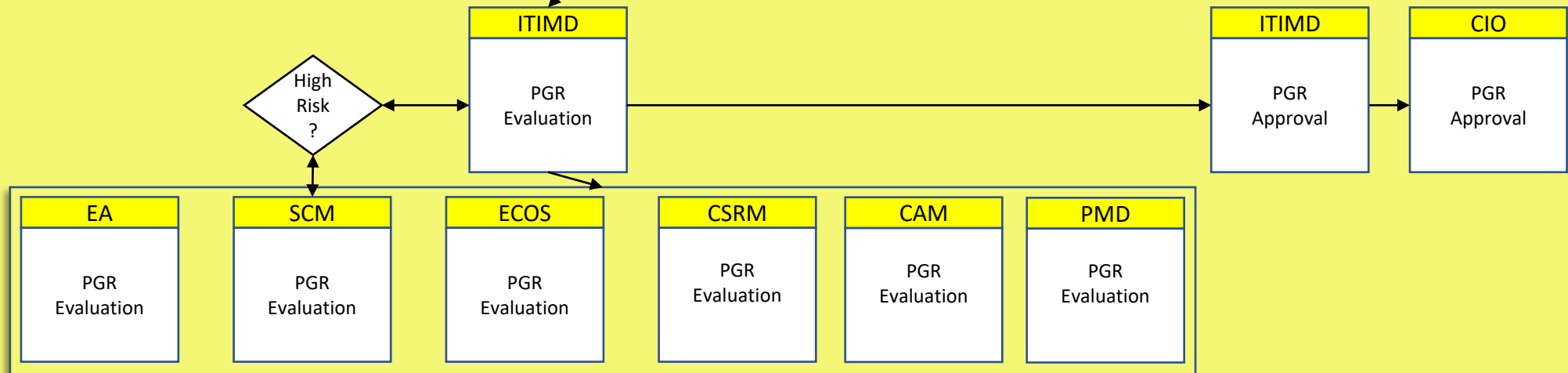
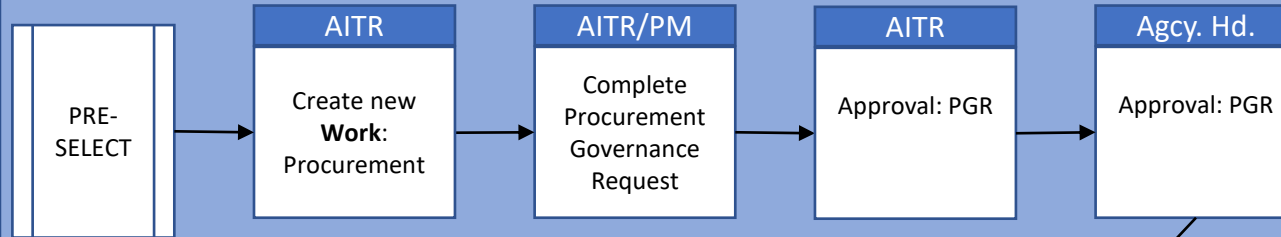
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AGENCY

GOVERNANCE &  
OVERSIGHT

## 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



Activity

Pre-defined Process

Decision

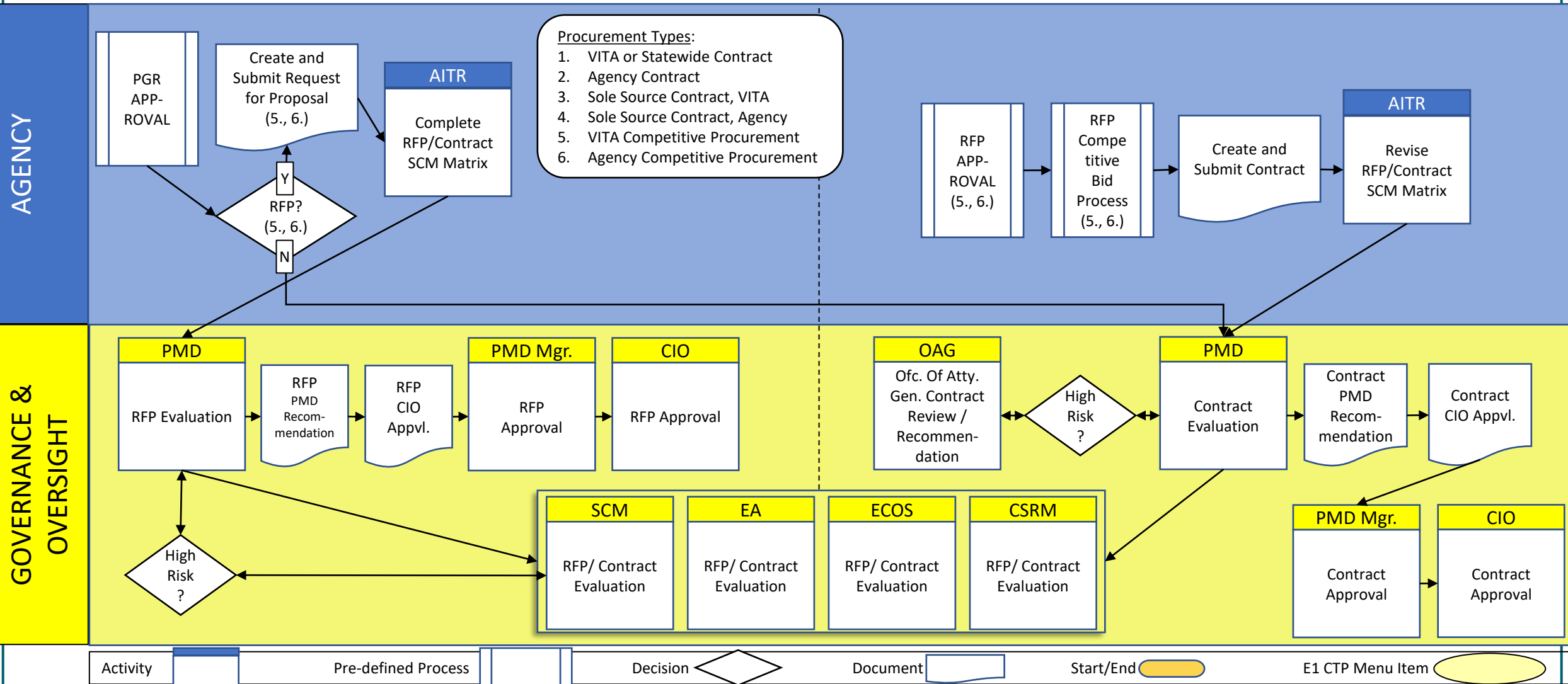
Document

Start/End

E1 CTP Menu Item

# Control/Initiation (RFP/Contract Governance)

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# Wrap-up

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1. Help resources
2. Scenarios
3. Next Steps

# Single Sign-on (SSO)

- Use Chrome or Edge browser - - not IE!

