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.

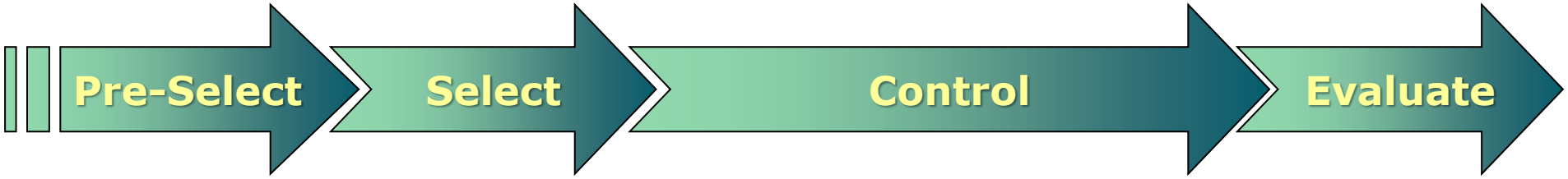
ITIM Lifecycle: Agency Roles, Oversight & Governance Roles

AGENCY	• Project Manager (PM) • Agency IT Representative (AITR) • Business Sponsor (Bus. Spon.) • Agency Head / representative (Agcy. Hd.) • Secretariat Oversight Committee (SOC)
OVERSIGHT & GOVERNANCE	• Project Management Division Consultant (PMD) • Project Management Division Manager (PMD Mgr.) • IT Investment Management Division Consultant (ITIMD) • Enterprise Architecture (EA) • Supply Chain Management (SCM) • Enterprise Cloud Oversight Service (ECOS) • Commonwealth Security and Risk Management (CSRM) • Customer Account Manager (CAM) • Secretariat Oversight Committee (SOC) • Commonwealth Chief Information Officer (CIO)

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

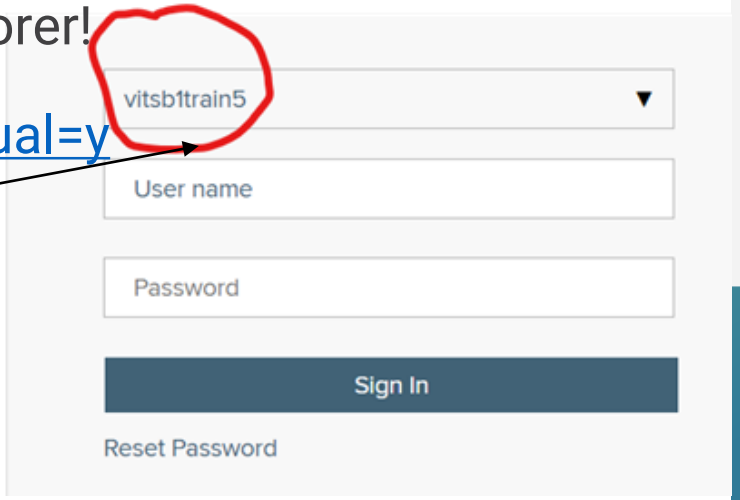
CTP E1 Basic Navigation – cont'd

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

Log into the Training Environment

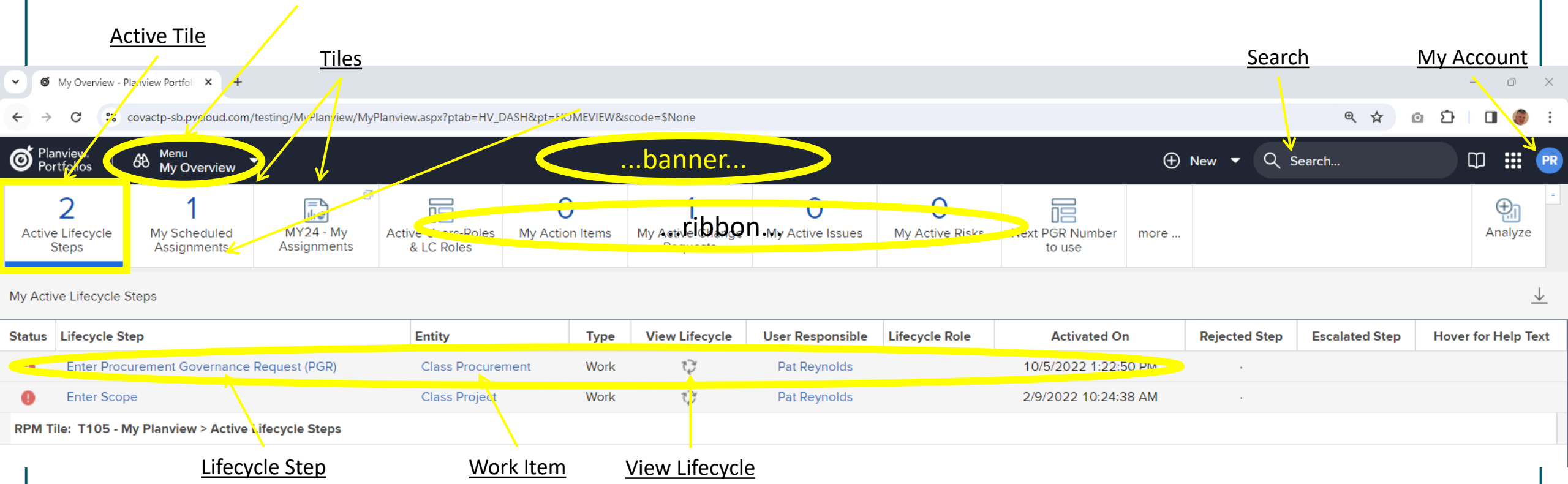
1. Open browser: Use Chrome or Edge only - - NOT Internet Explorer!
2. https://covactp-sb.pvcloud.com/testing/login/body.asp?manual=y
3. Environment: VITSB1TRAIN**5** (aka "TRAIN5")
4. User name: Student01, Student02, Student03, ….etc.
5. Password: train01 train02 train03 …etc.
6. …you might be prompted 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.)

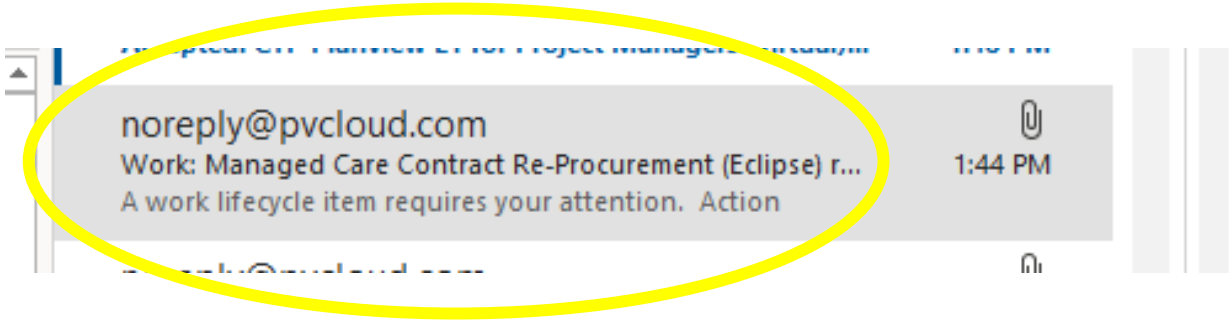


CTP E1 Navigation: Banner / My Overview

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



Email Notification



Email Notification

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

N 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

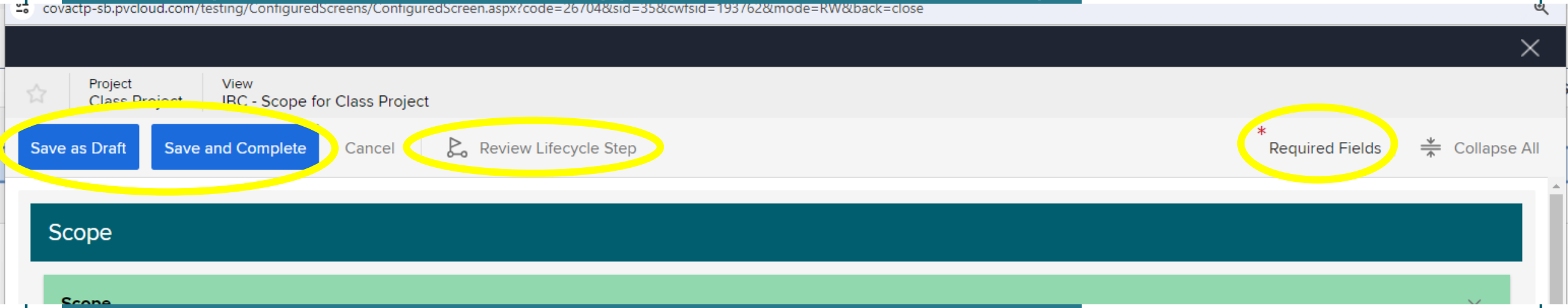
Other actions
Work details: Managed Care Contract Re-Procurement (Eclipse)
Lifecycle diagram: Managed Care Contract Re-Procurement (Eclipse)

Planview Portfolios

Customer Success Center | Email Settings

Email Notification: Lifecycle Item

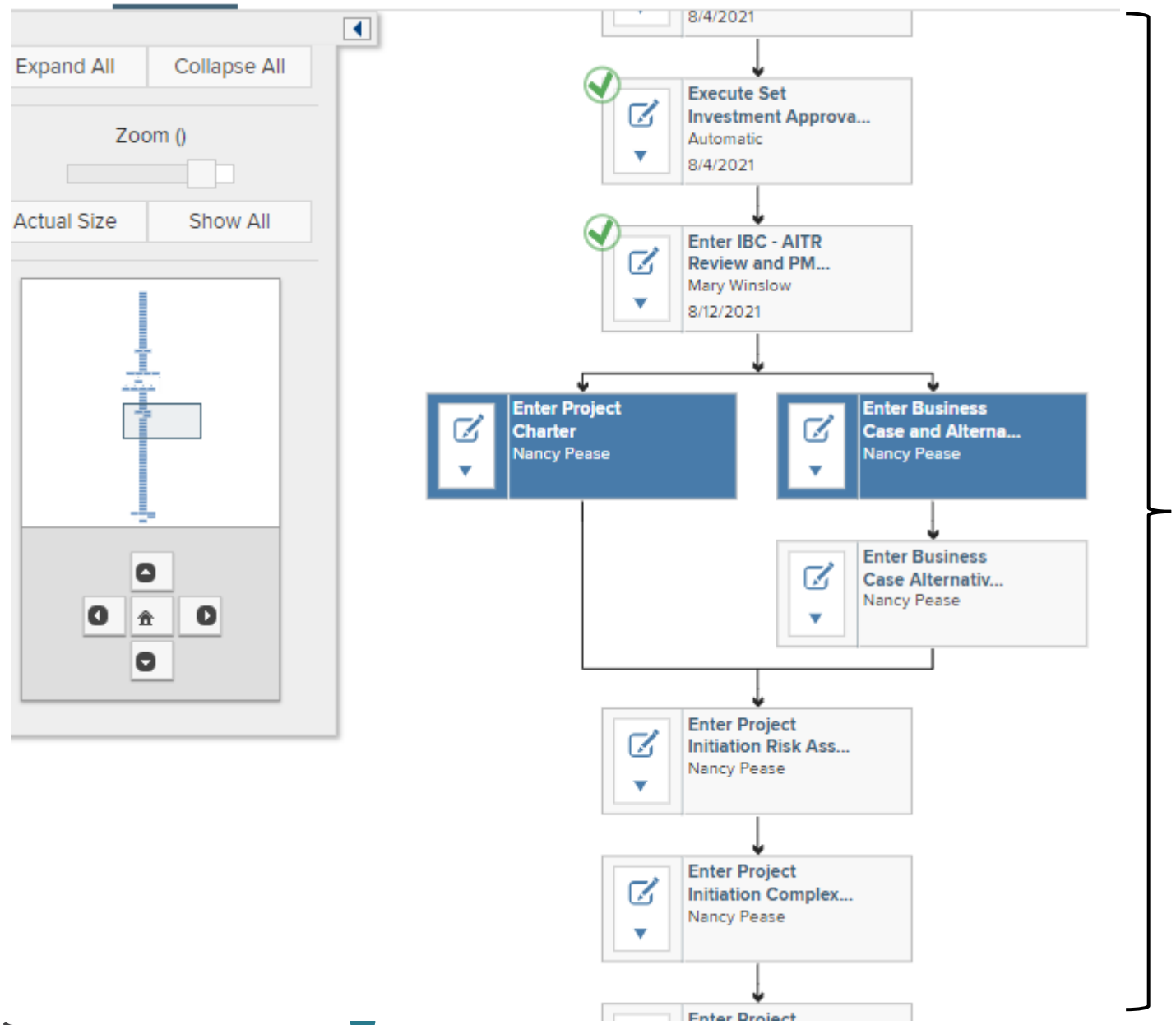
- Review Item
- Complete the action, such as: Approval checkbox + date stamp



- "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"

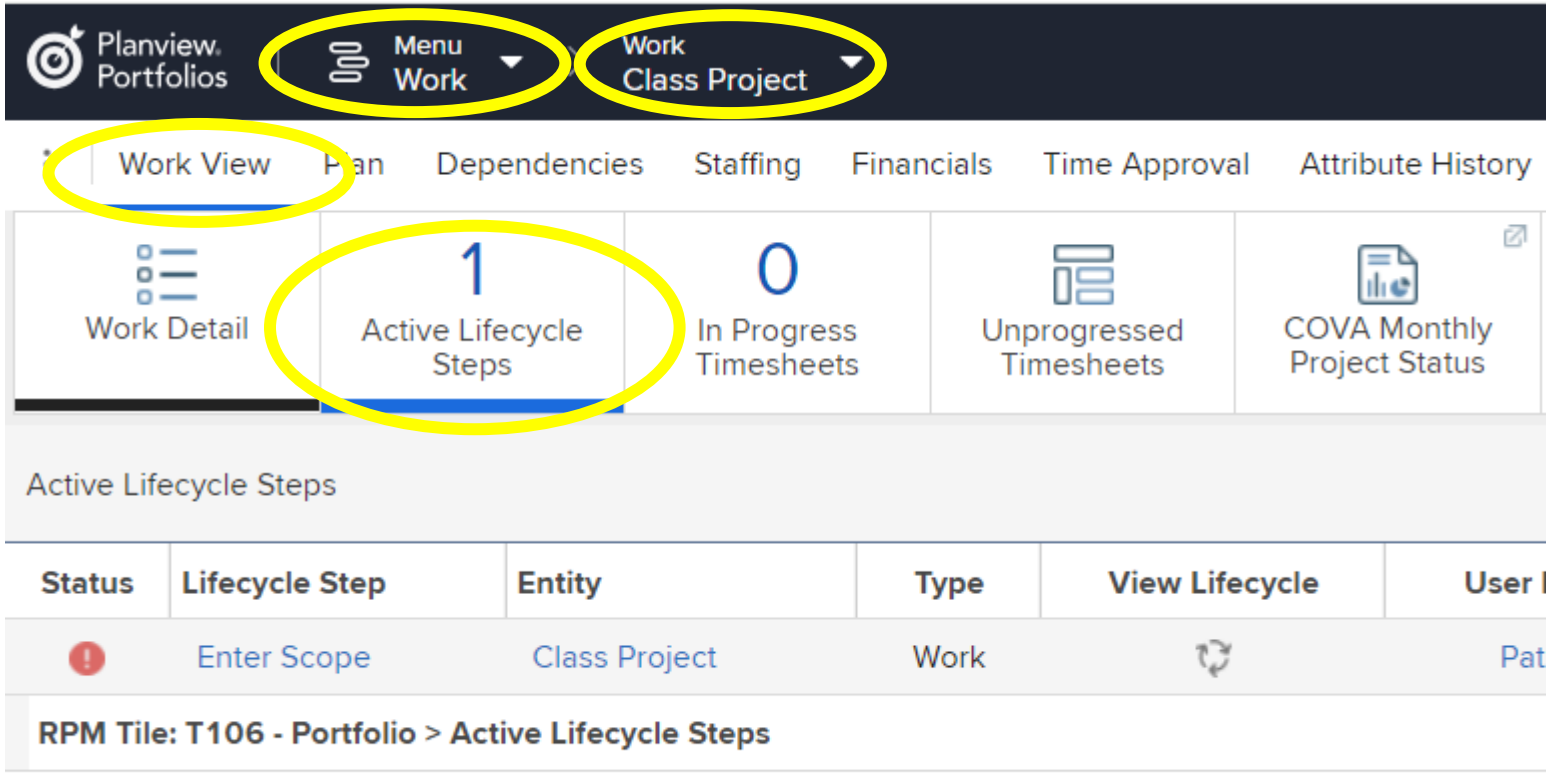
- Individuals (roles) will receive email notification when they need to complete an Active Lifecycle Step.
- Upon completion of the Active Lifecycle Step, the next task in sequence will become Active, and the User Responsible will receive email notification.



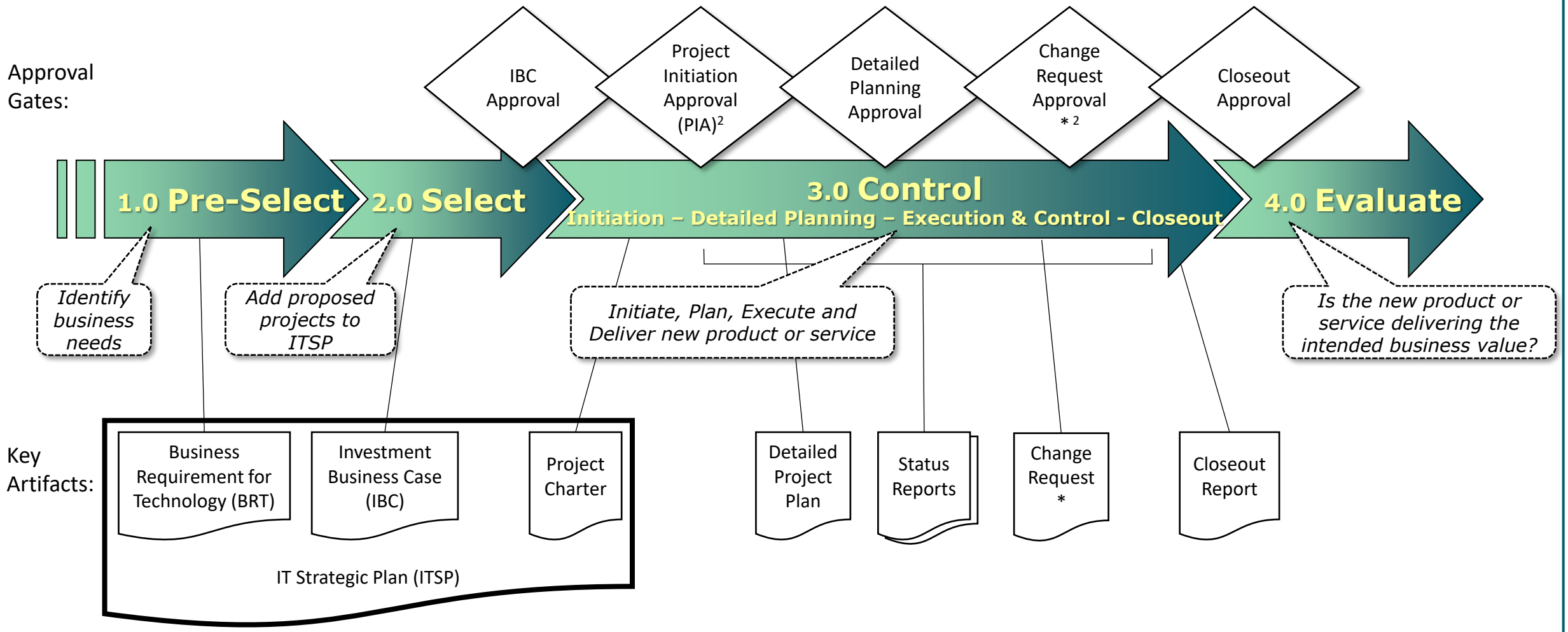
Example CTP E1 Lifecycle for Investment Business Case (IBC) approval, moving into Initiation phase.

Top Tip: Active Lifecycle Steps

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



IT Project Lifecycle: Key Approval Gates and Documentation



[2] Category 1-3 projects: SOC approval required

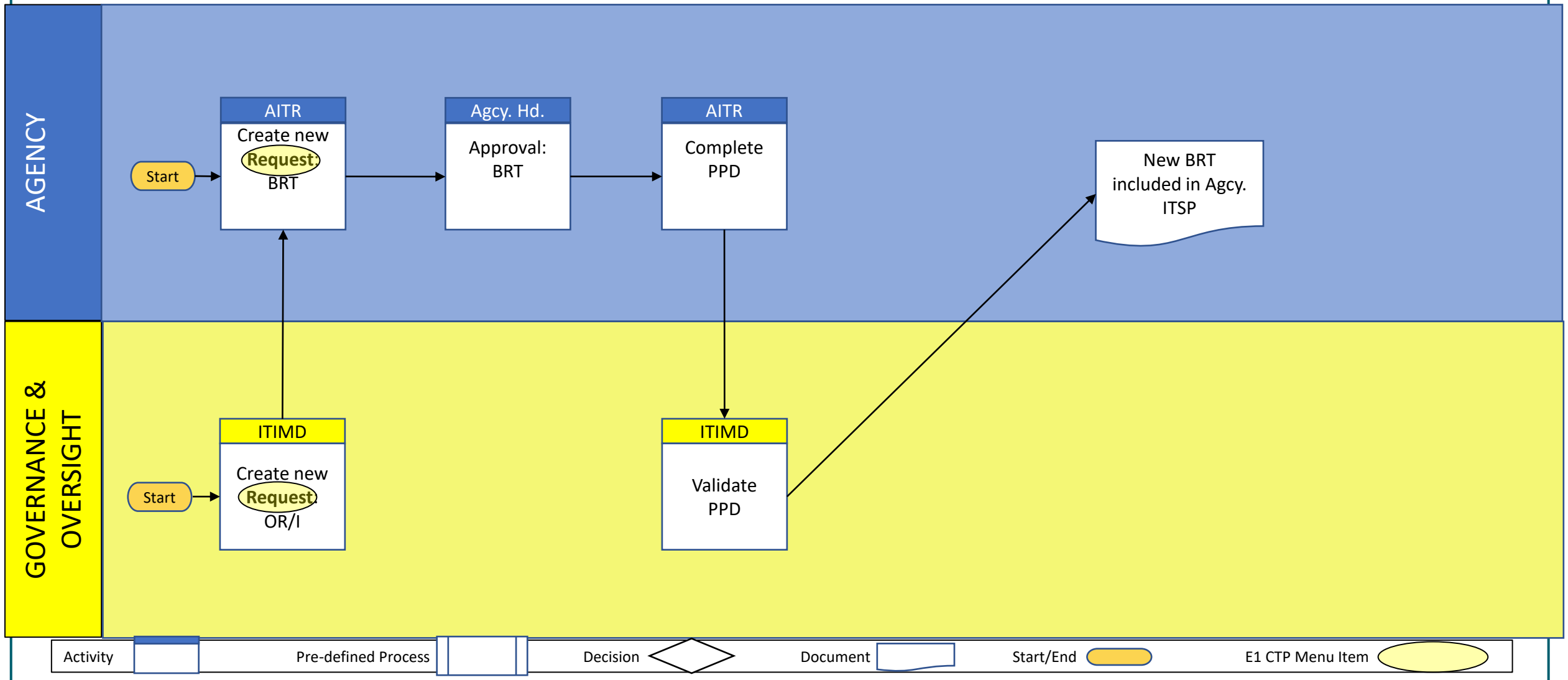
* Change Request if needed

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

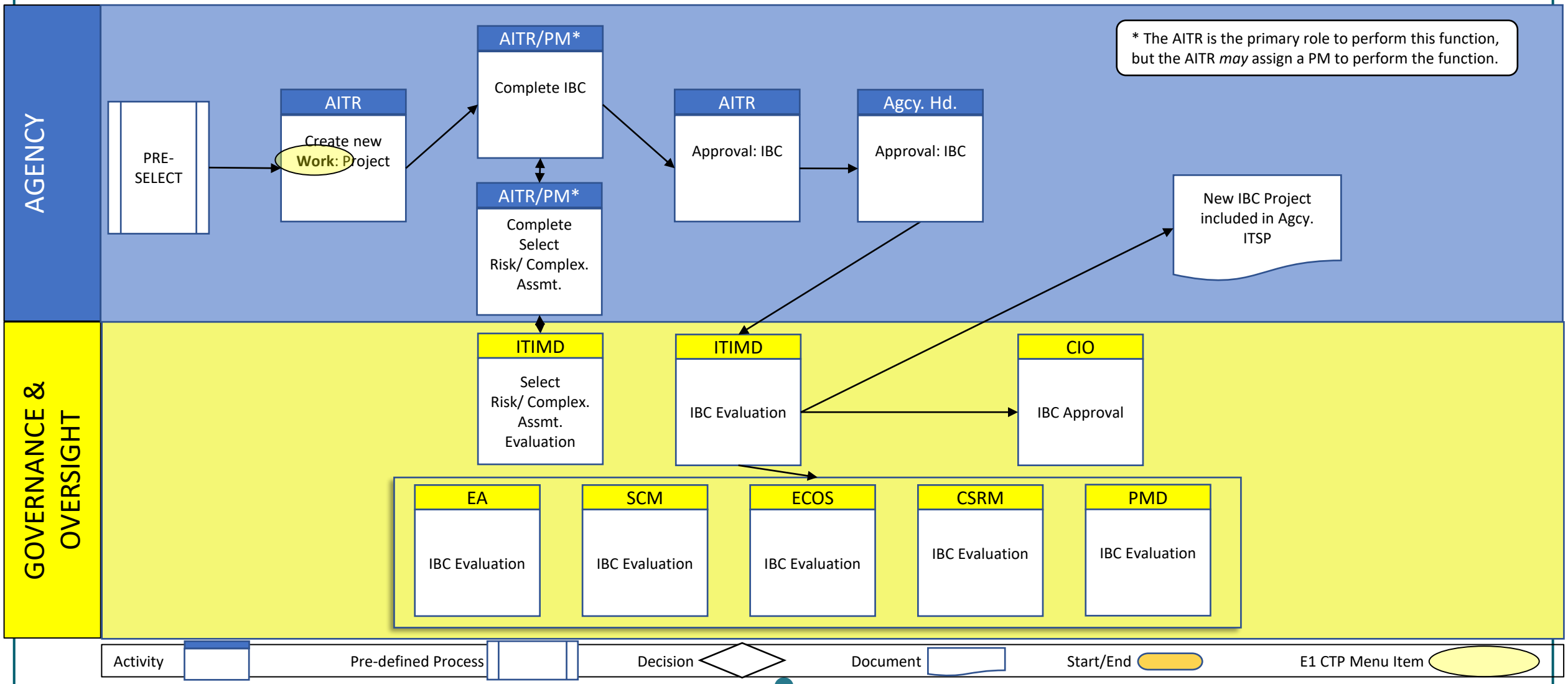
ITIM Lifecycle: 2.0 Select

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

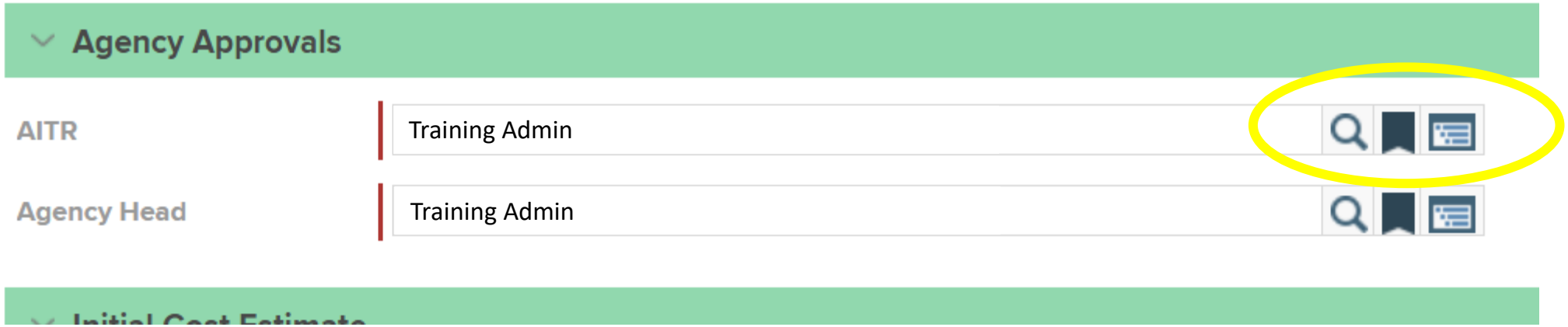


2.0 Select


AGENCY
GOVERNANCE & OVERSIGHT
* The AITR is the primary role to perform this function, but the AITR *may* assign a PM to perform the function.
PRE-SELECT
AITR
Create new Work: Project
AITR/PM*
Complete IBC
AITR/PM*
Complete Select Risk/ Complex. Assmt.
AITR
Approval: IBC
Agcy. Hd.
Approval: IBC
New IBC Project included in Agcy. ITSP
ITIMD
Select Risk/ Complex. Assmt. Evaluation
ITIMD
IBC Evaluation
CIO
IBC Approval
EA
IBC Evaluation
SCM
IBC Evaluation
ECOS
IBC Evaluation
CSRM
IBC Evaluation
PMD
IBC Evaluation
Activity
Pre-defined Process
Decision
Document
Start/End
E1 CTP Menu Item

Data Picker

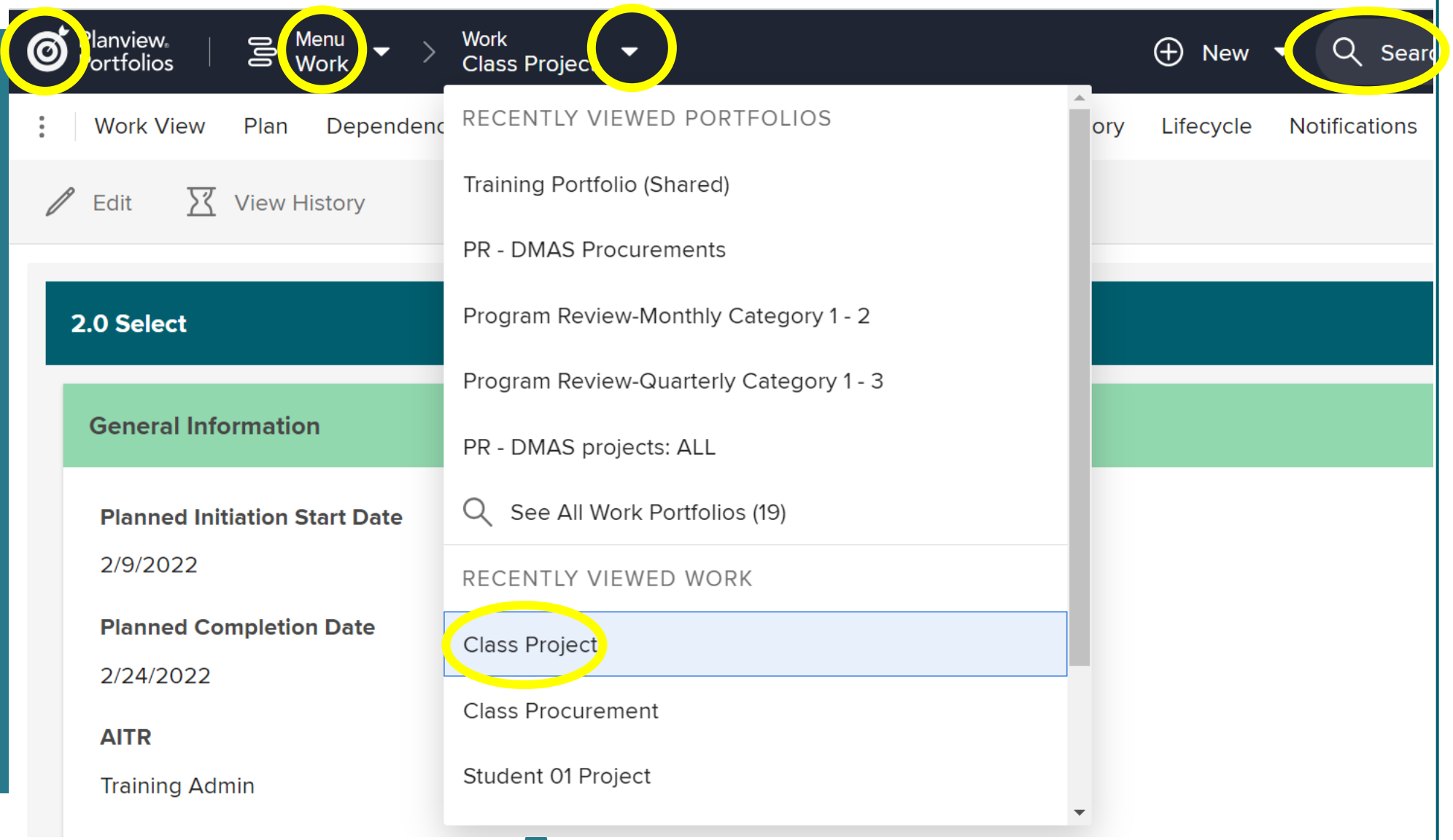
- Allows only valid values



Find your Work Item

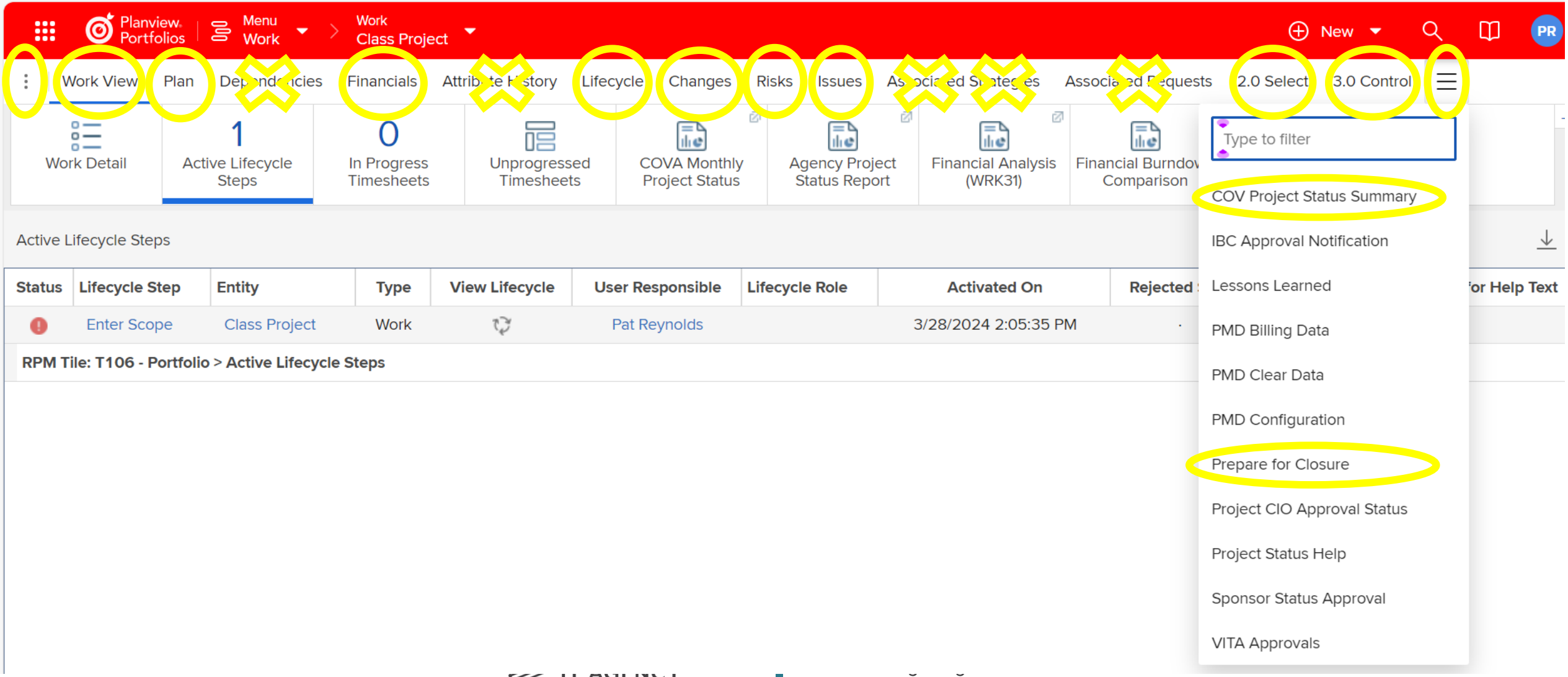
- Click on:
- Planview Portfolio
- Menu > Work
- Work > Student 01 Project

- ...or do a keyword search

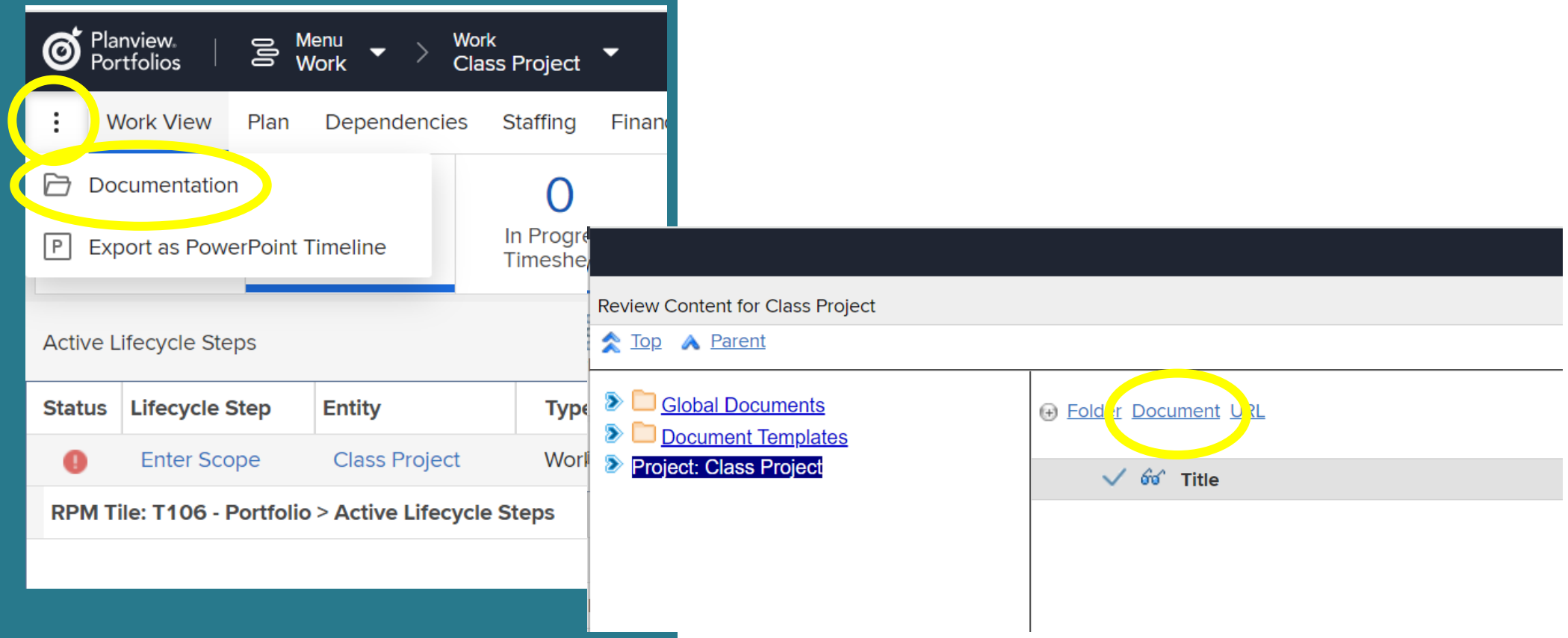


Sub-menu

- Typical menu items:

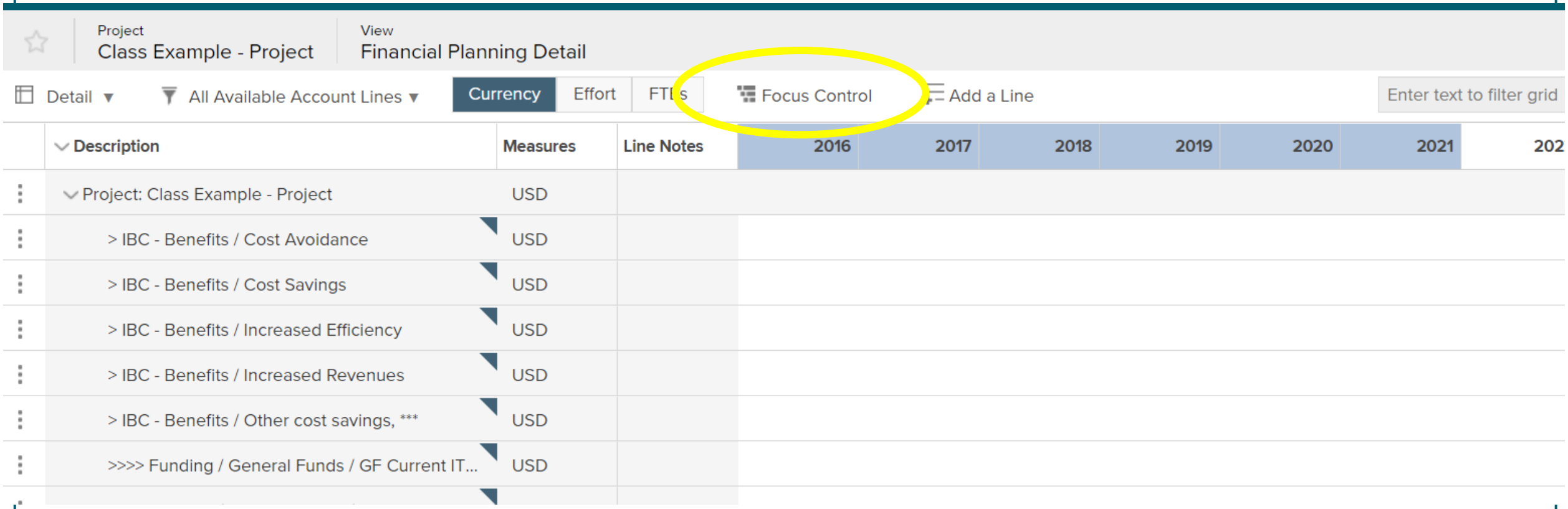


Document Repository



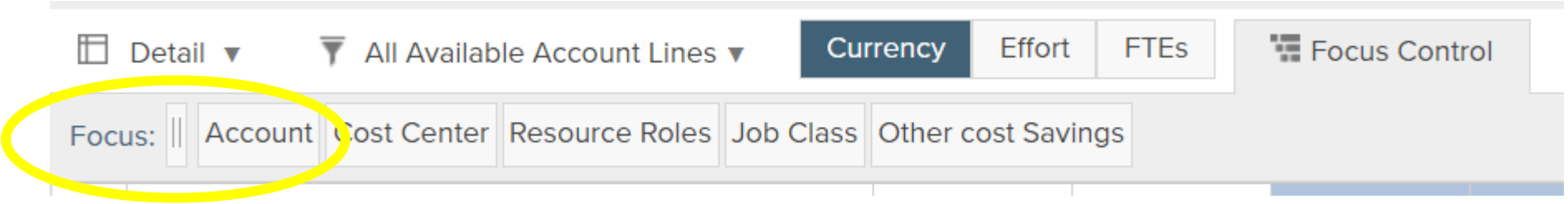
Financials

- Clean up your view

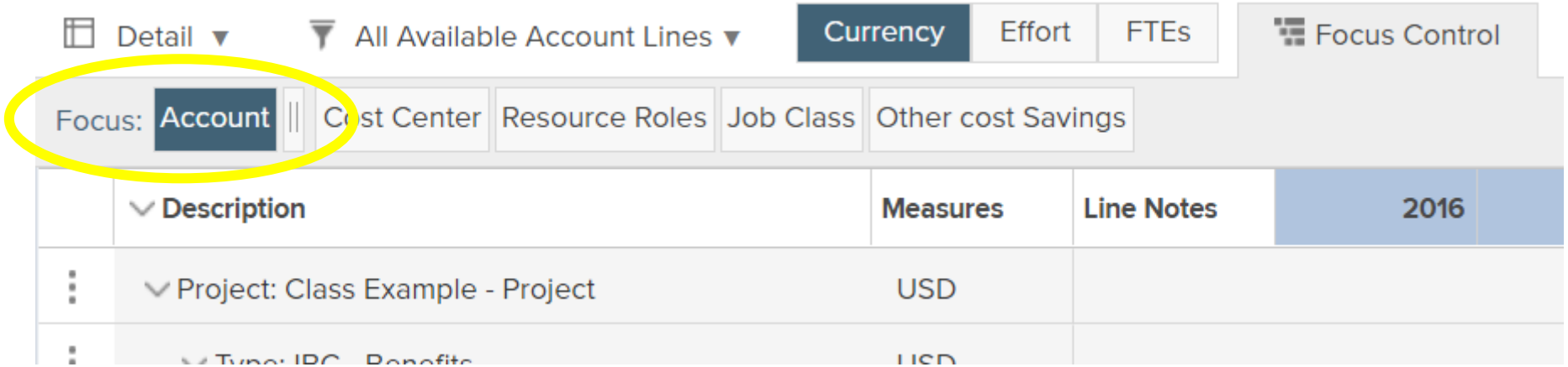


Financials

- Focus Control
  - From this…



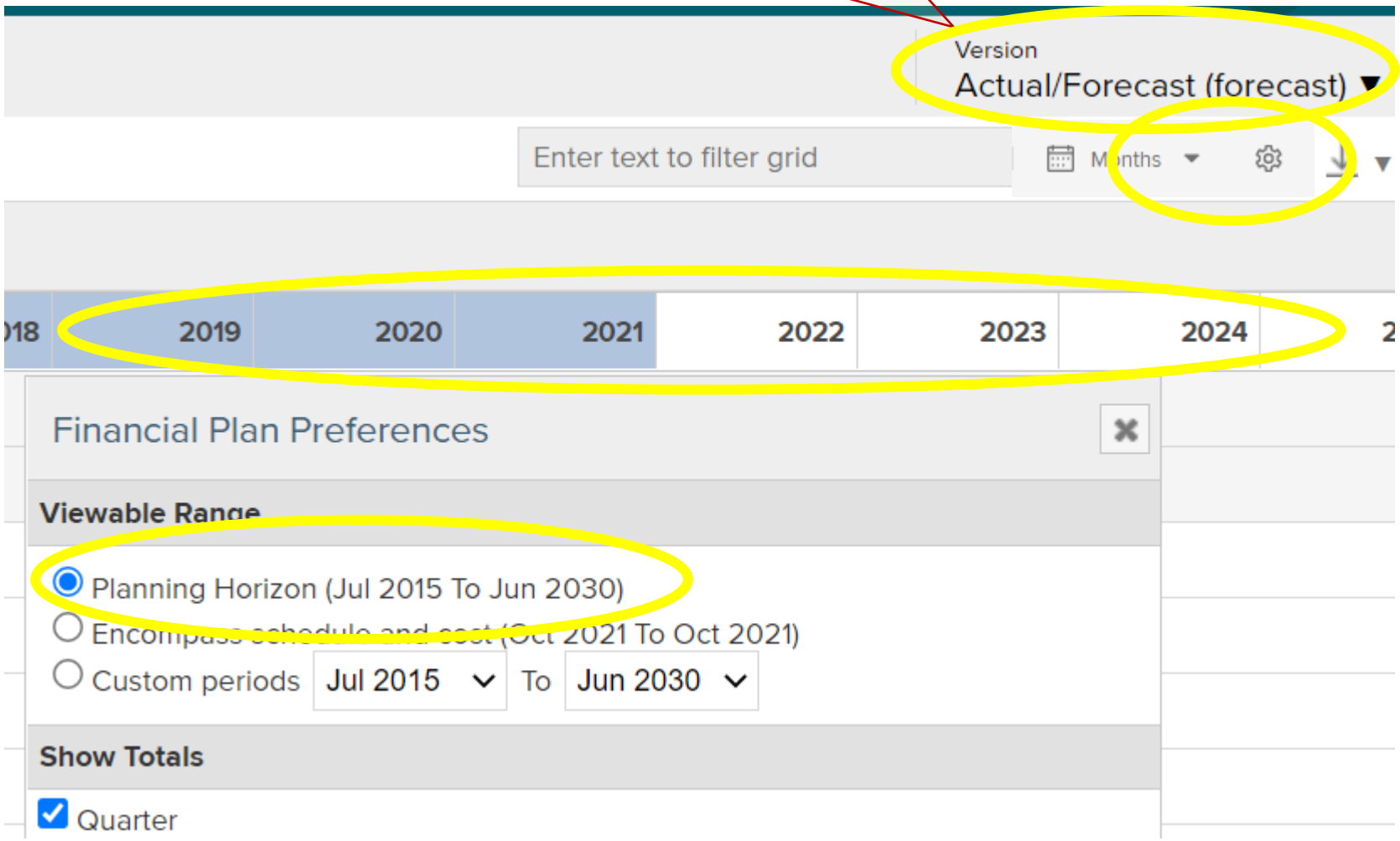
  - To this…



Financials

- Display Preferences
  - From this…

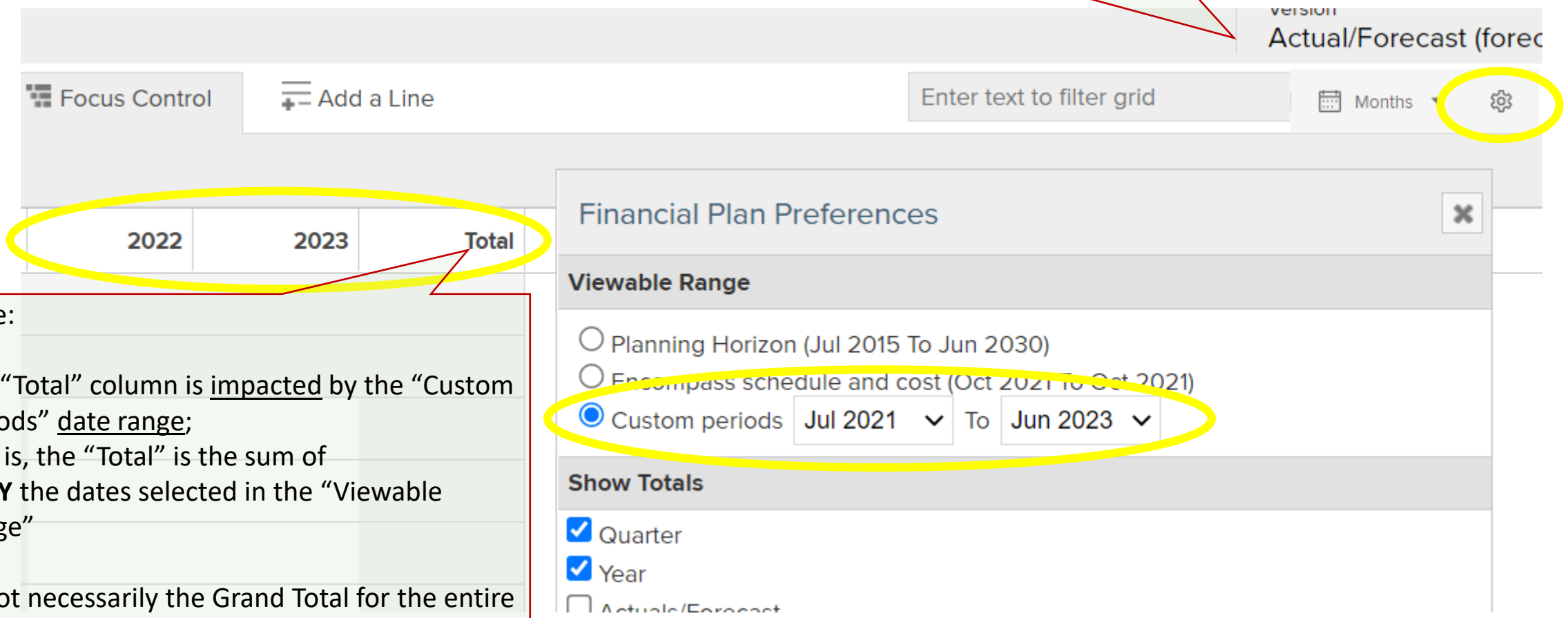
Verify that 'Version' = 'Actual/Forecast (forecast)



Financials

- Display Preferences
  - To this…

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



Note:

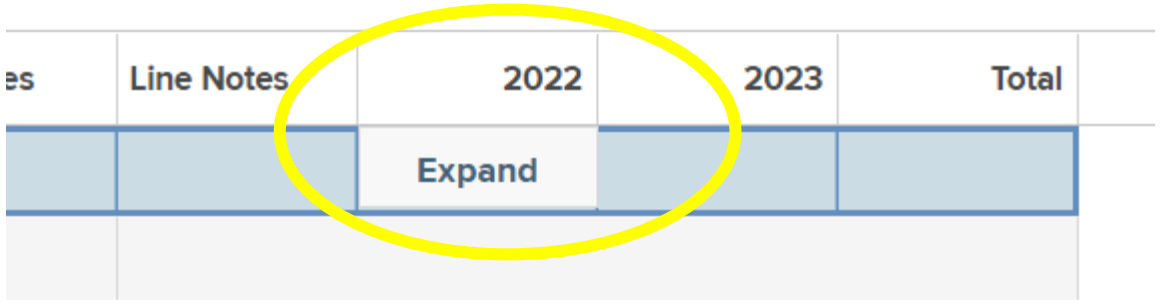
The "Total" column is impacted by the "Custom periods" date range;
that is, the "Total" is the sum of **ONLY** the dates selected in the "Viewable Range"

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

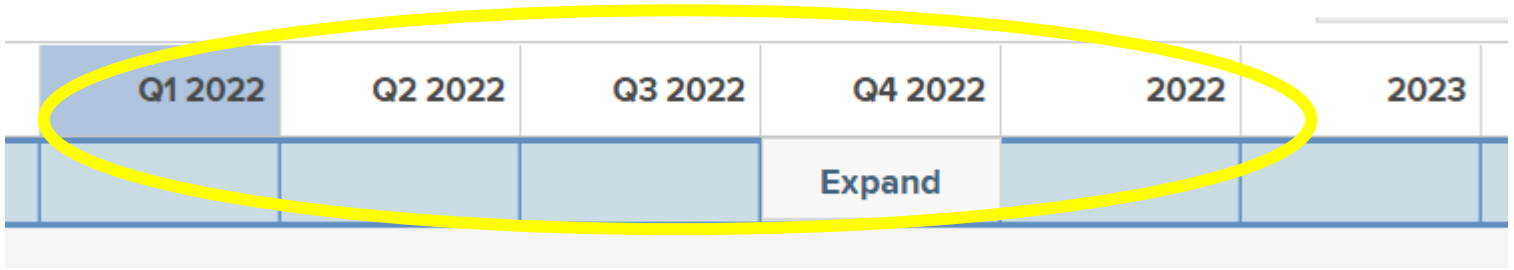
Financials

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

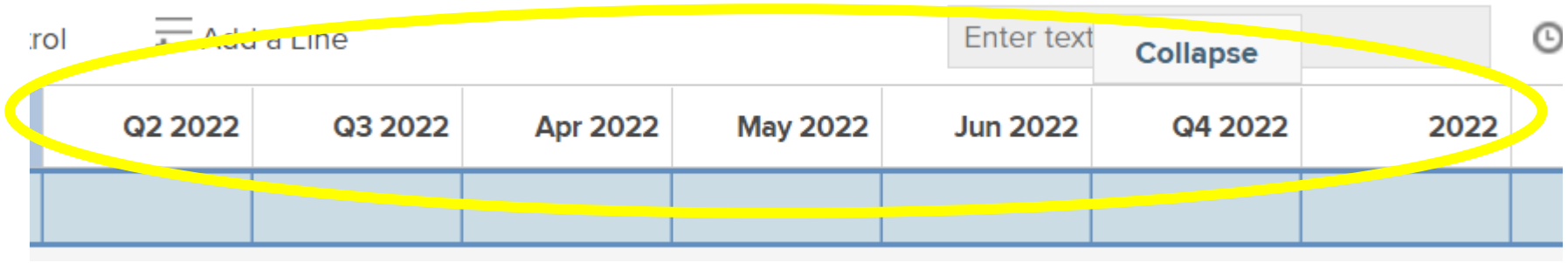
- From this…



- To this…



- To this…



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

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

Class Example - Project | Financial Planning Detail

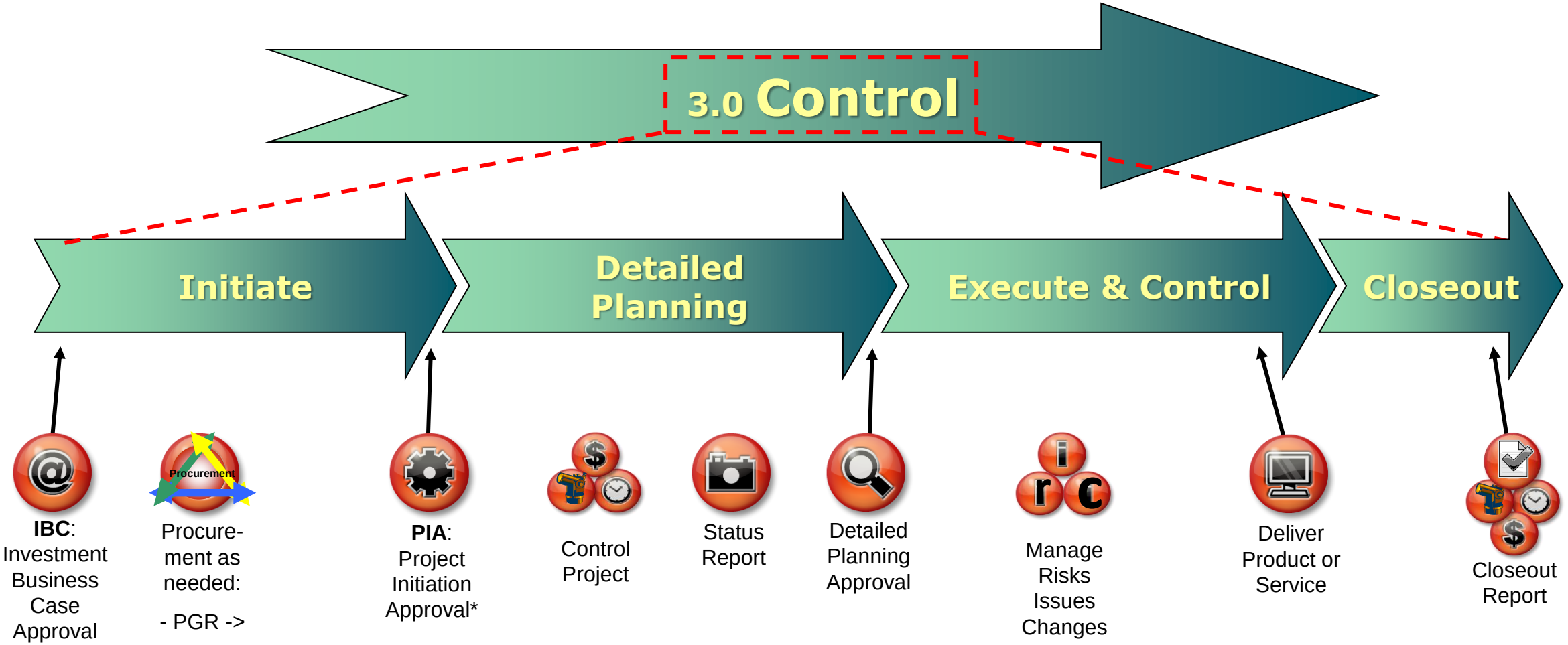
Detail ▾ | All Available Account Lines ▾ | Currency | Effort | FTEs | Focus Control | Add a Line

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…

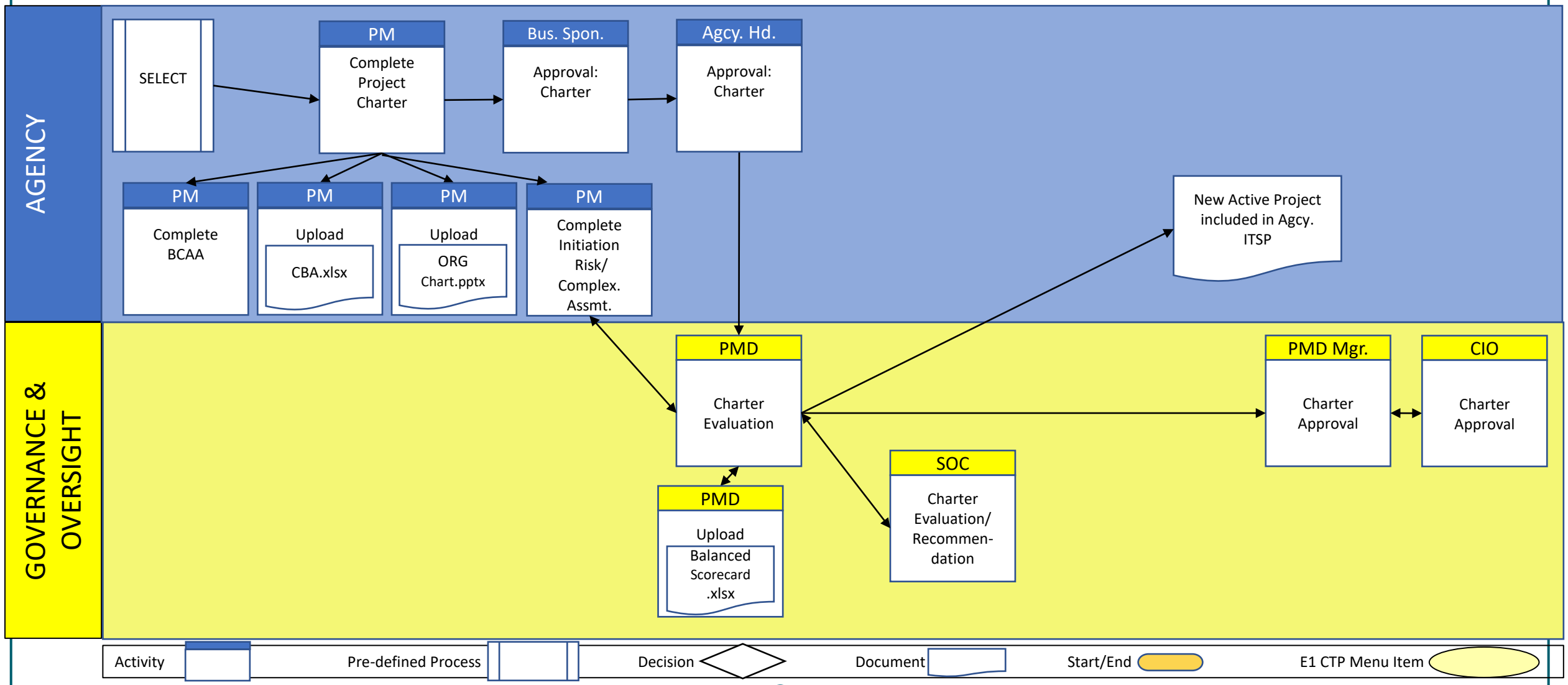
CPM Methodology Within The ITIM Lifecycle



*NOTE: Projects are designated "active" upon Project Initiation Approval.

**NOTE: Contract may only be signed AFTER Project Initiation Approval.

3.0 Control/Initiation (Project)



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
Full-Time Project Manager	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
Internal Agency Oversight Committee? (IAOC)	Required, with PMD	Required, with PMD	Required, with PMD	None; Agcy. PM Team only
(PMD): Balanced Scorecard	Required, delphi	Required, delphi	Required, delphi	Not required
Project Initiation Approval Path:	Sponsor > Agcy Hd > SOC > PMD > CIO	Sponsor > Agcy Hd > SOC > PMD > CIO	Sponsor > Agcy Hd > SOC > PMD > CIO	Sponsor > Agcy Hd

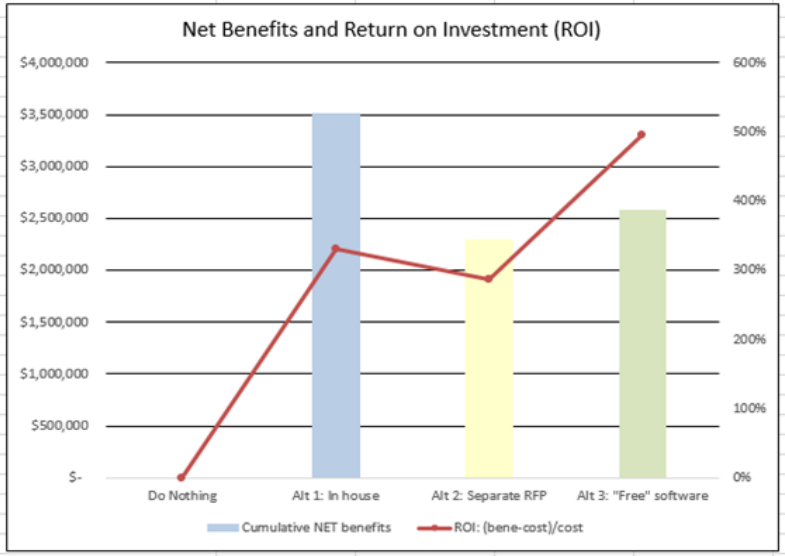
Cost-Benefit Analysis (CBA)

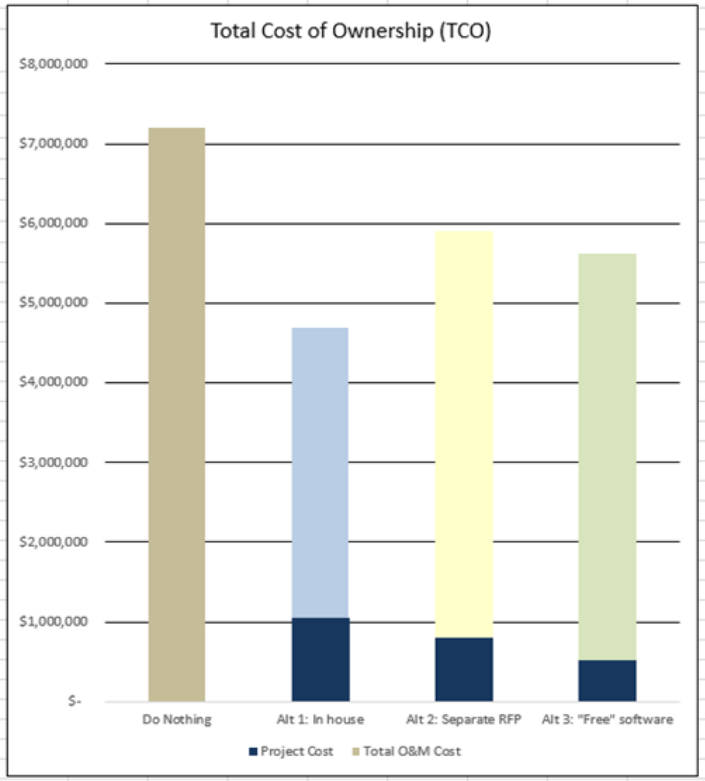
B19 ='Do Nothing'!M38

Cost Benefit Analysis: VITA PMD Example Project

Period of Analysis = __8__ years

	Do Nothing	Alt 1: In house	Alt 2: Separate RFP	Alt 3: "Free" software
Project Cost	$ -	$ 1,060,000	$ 800,000	$ 520,000
Total O&M Cost	$ 7,200,000	$ 3,630,000	$ 5,100,000	$ 5,100,000
TCO: Project + O&M	$ 7,200,000	$ 4,690,000	$ 5,900,000	$ 5,620,000
Cumulative benefits	$ -	$ 4,570,000	$ 3,100,000	$ 3,100,000
Cumulative NET benefits	$ -	$ 3,510,000	$ 2,300,000	$ 2,580,000
ROI: (bene-cost)/cost	0%	331%	288%	496%
Breakeven:	n/a	Year 2	Year 2	Year 1





Summary | Do Nothing | Alt 1. | Alt 2. | Alt 3. | Notes | Instructions

Financials

- 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

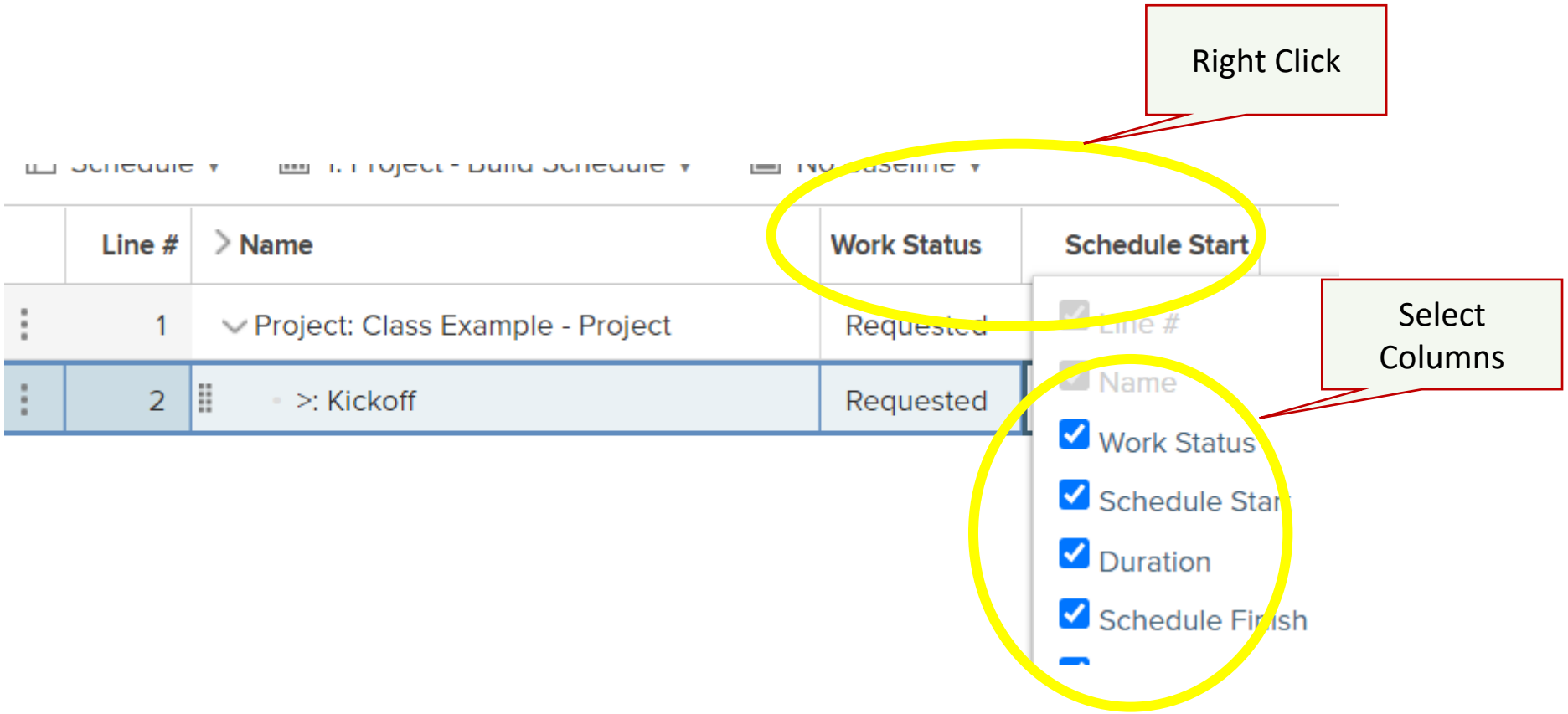
View
Work and Assignments (Schedule)

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				

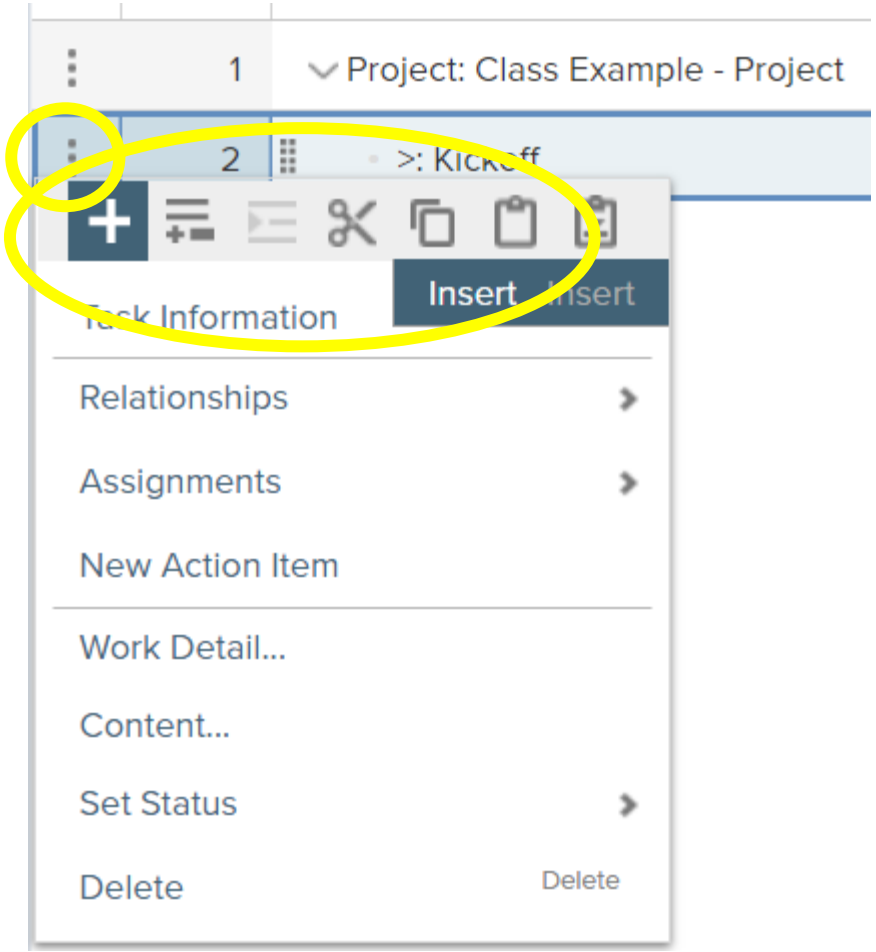
Plan

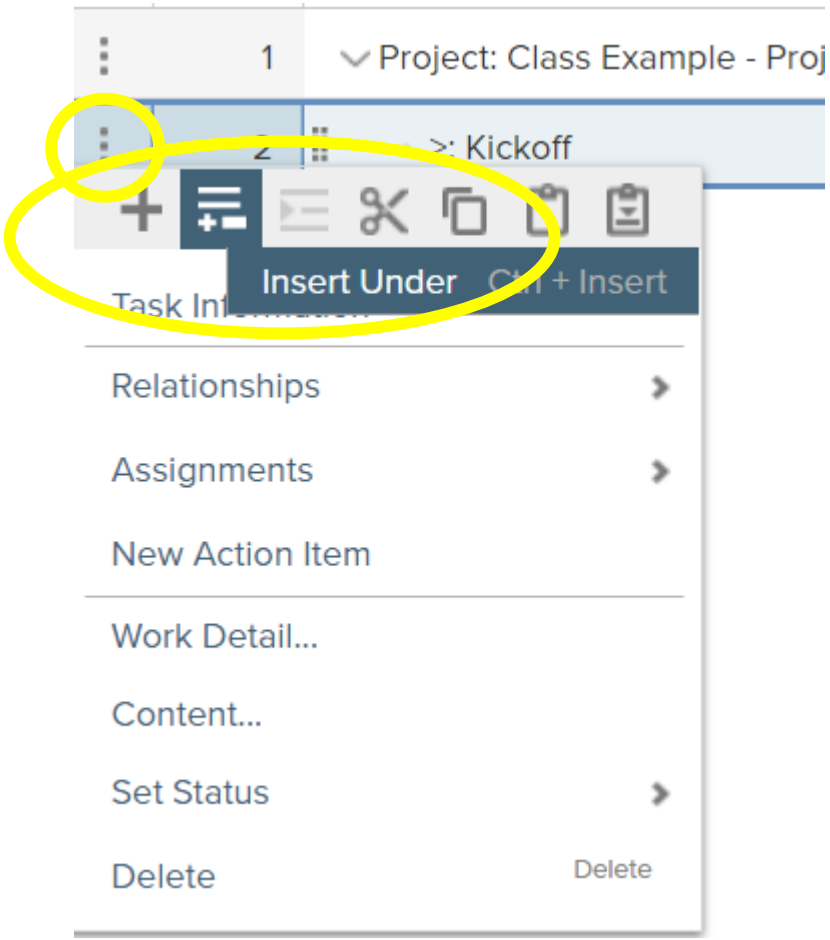
- Reveal / Hide Columns



Plan

- Tasks: Insert, Insert Under

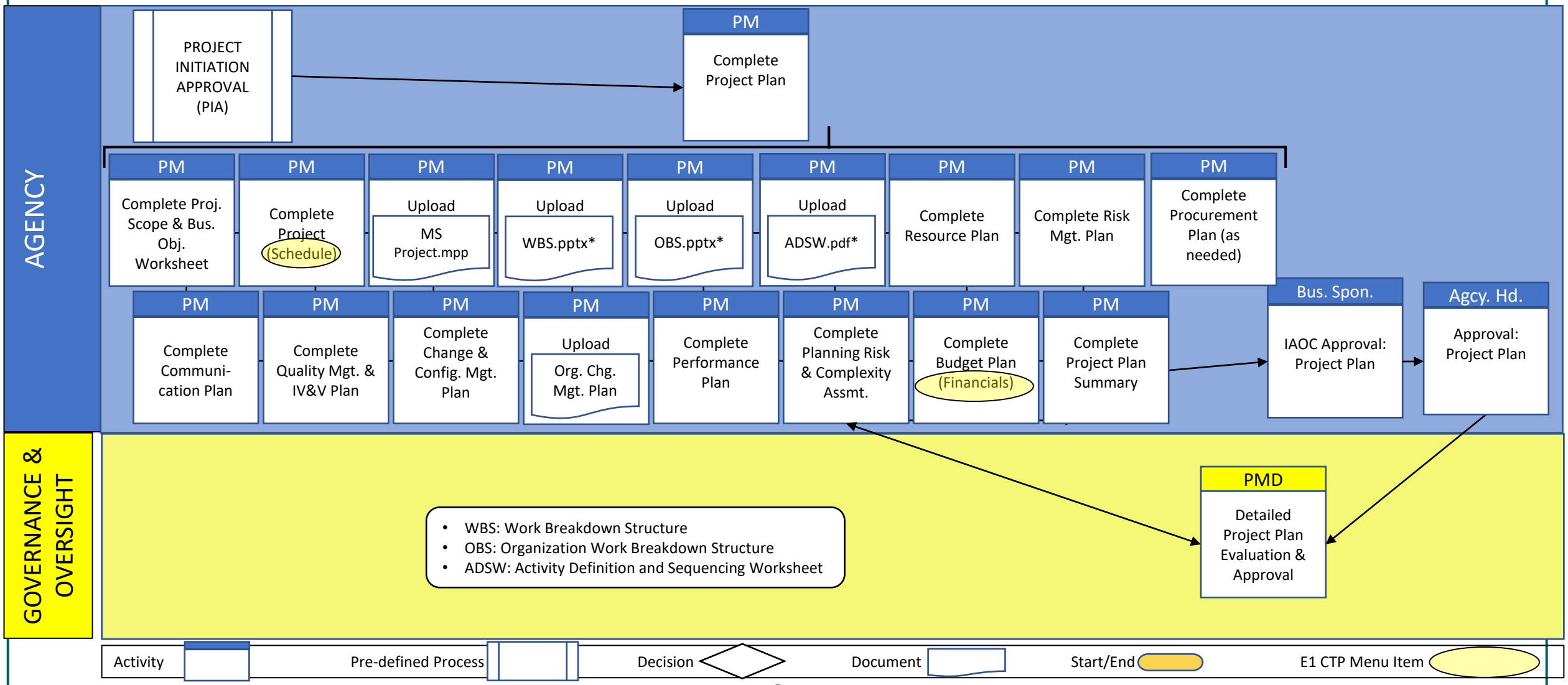




ITIM Lifecycle: 3.0 Control: Detailed Planning

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)



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

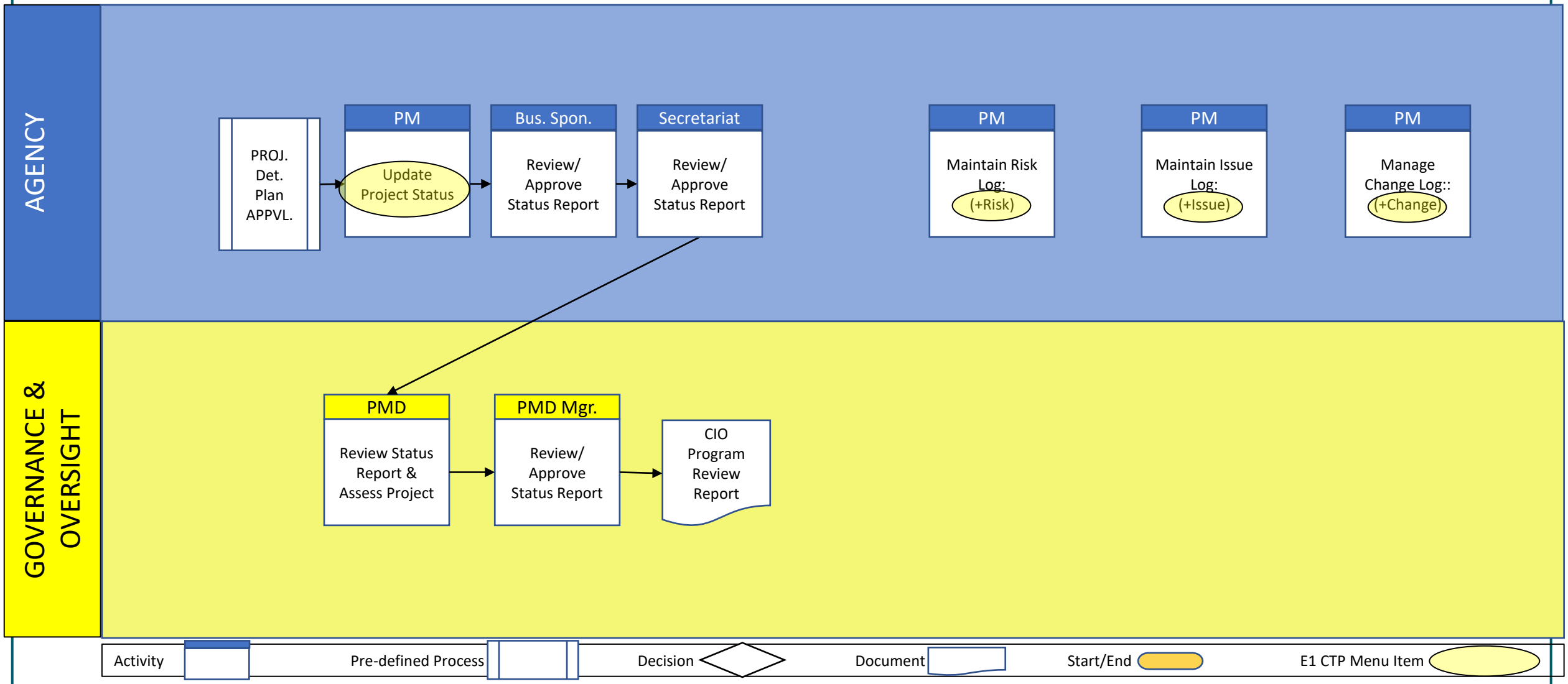
Detailed Planning: Differences by Project Category (Page 2)

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
Organization Change Management Plan	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
Detailed Planning Approval; up to +10% baseline, approved by…	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)



Execute & Control: Differences by Project Category

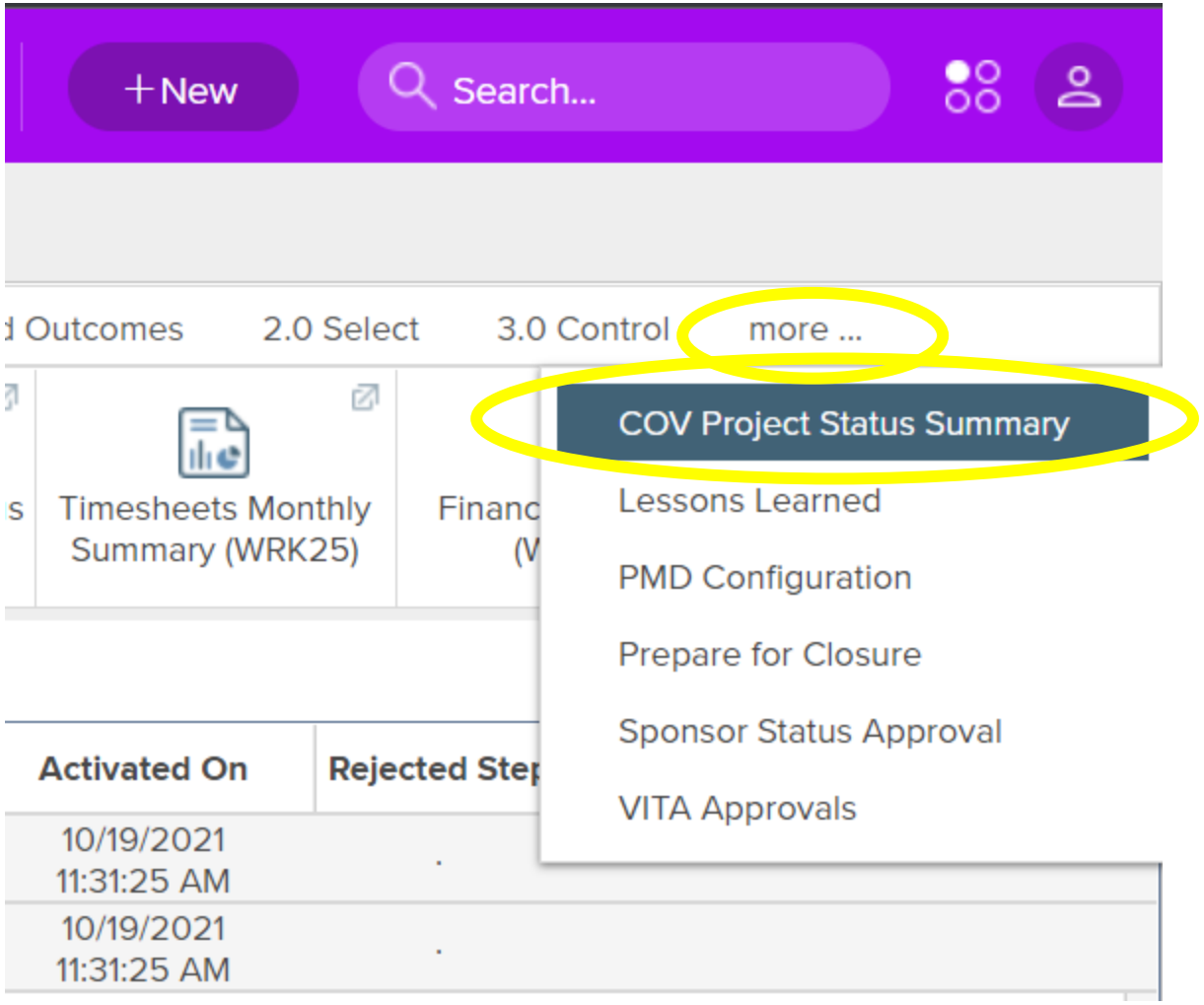
REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
IAOC Project Meetings	Monthly, w/PMD	Monthly, w/PMD	Quarterly, w/PMD	None; Agcy PM Team
In-Progress IV&V; to coincide with project phases	Required within 6 mo. of Planning Approval…	…then annual if project > 12 mo. duration.	Optional	None
Issue Log & Risk Log	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
- 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 2
Type: Budget Plan - Costs	USD	89,506	279,246	29,8
> Internal Staff Labor	USD	30,864	55,679	10,2
> Services	USD	58,642	223,567	19,5
> Software Tools	USD			

Project Status: Plan (Schedule)

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

Project
Child Support Payment Processing

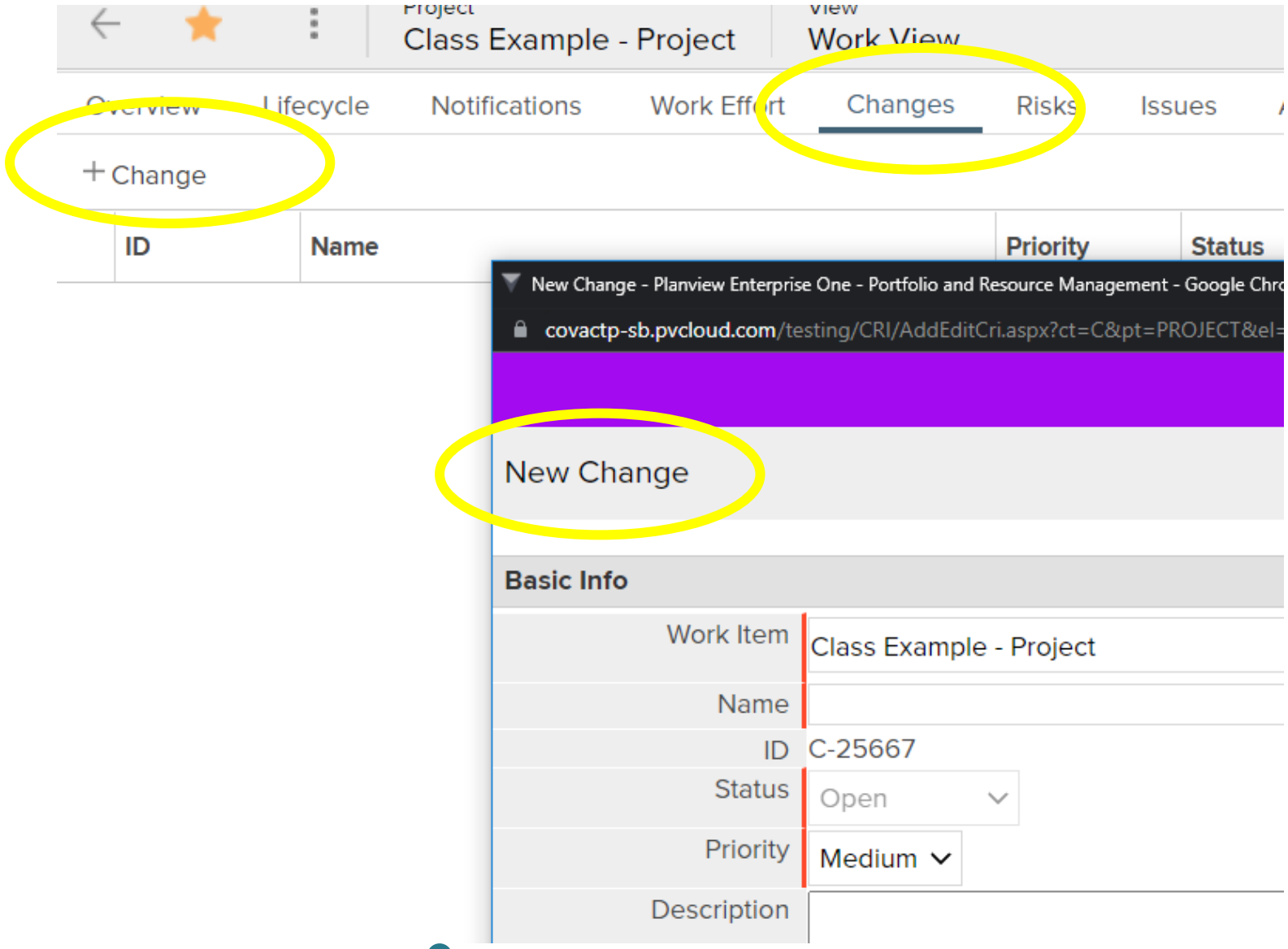
View
Work and Assignments (Schedule)

Schedule ▾ | 3. Project - Track Progress ▾ | Planning & Scheduling Baseline ▾

Line #	Name	Actual Start	Percent Complete	Actual Finish	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		

Change Control

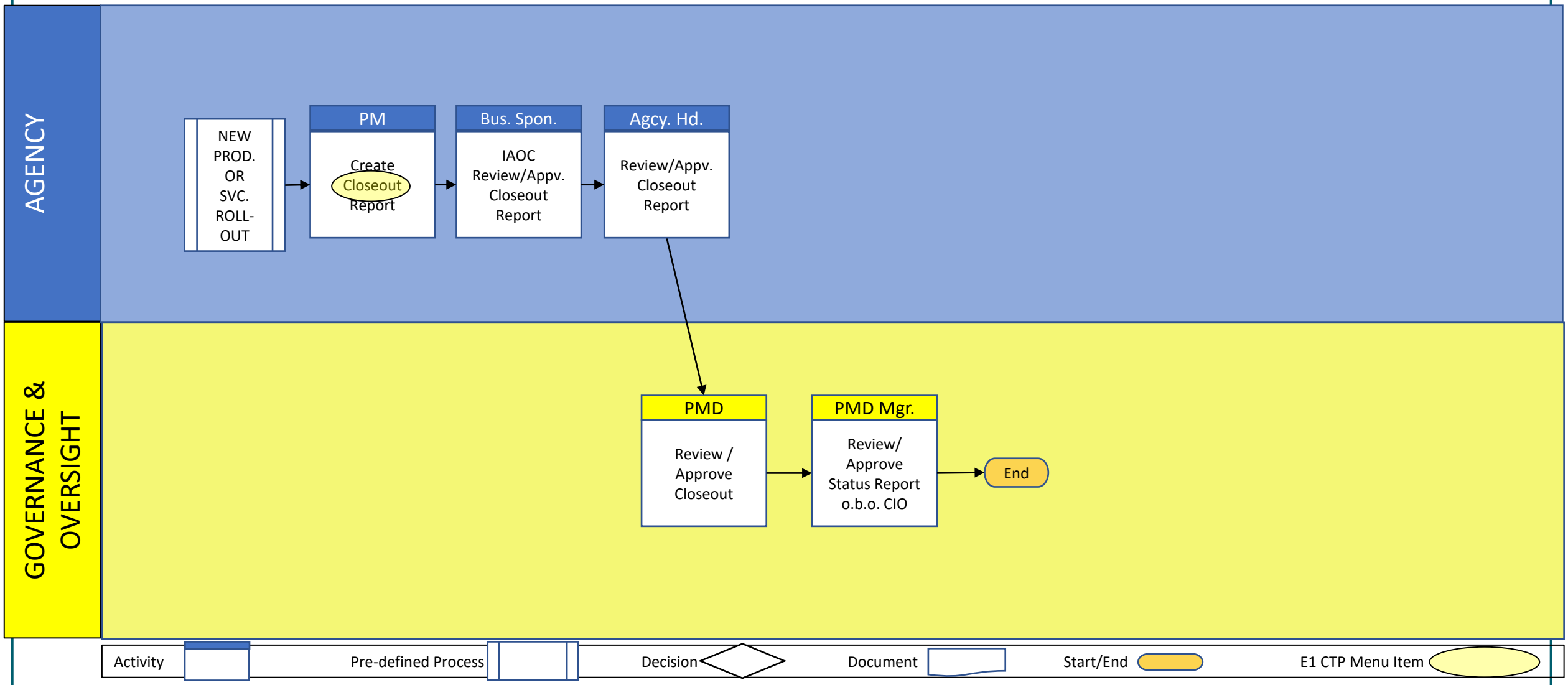
- Changes + Change



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)



Closeout: Differences by Project Category

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.

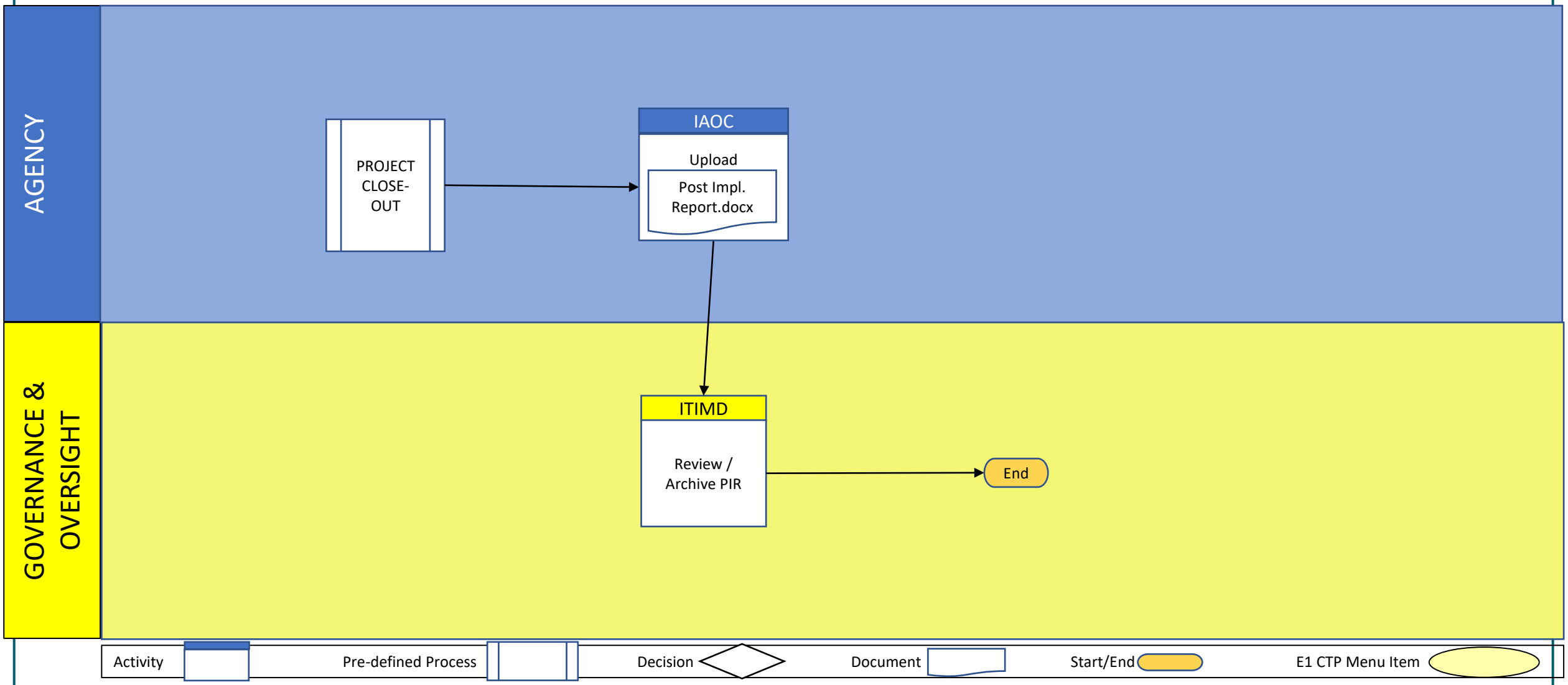
3. Evaluation phase consists of conducting Post-Implementation Review, (PIR) and uploading results into CTP.

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)

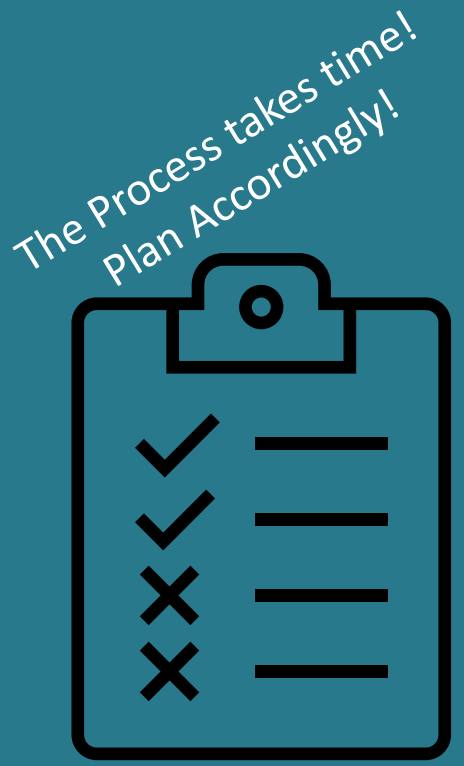


ITIM Methodology for IT Procurements (≥$250,000)

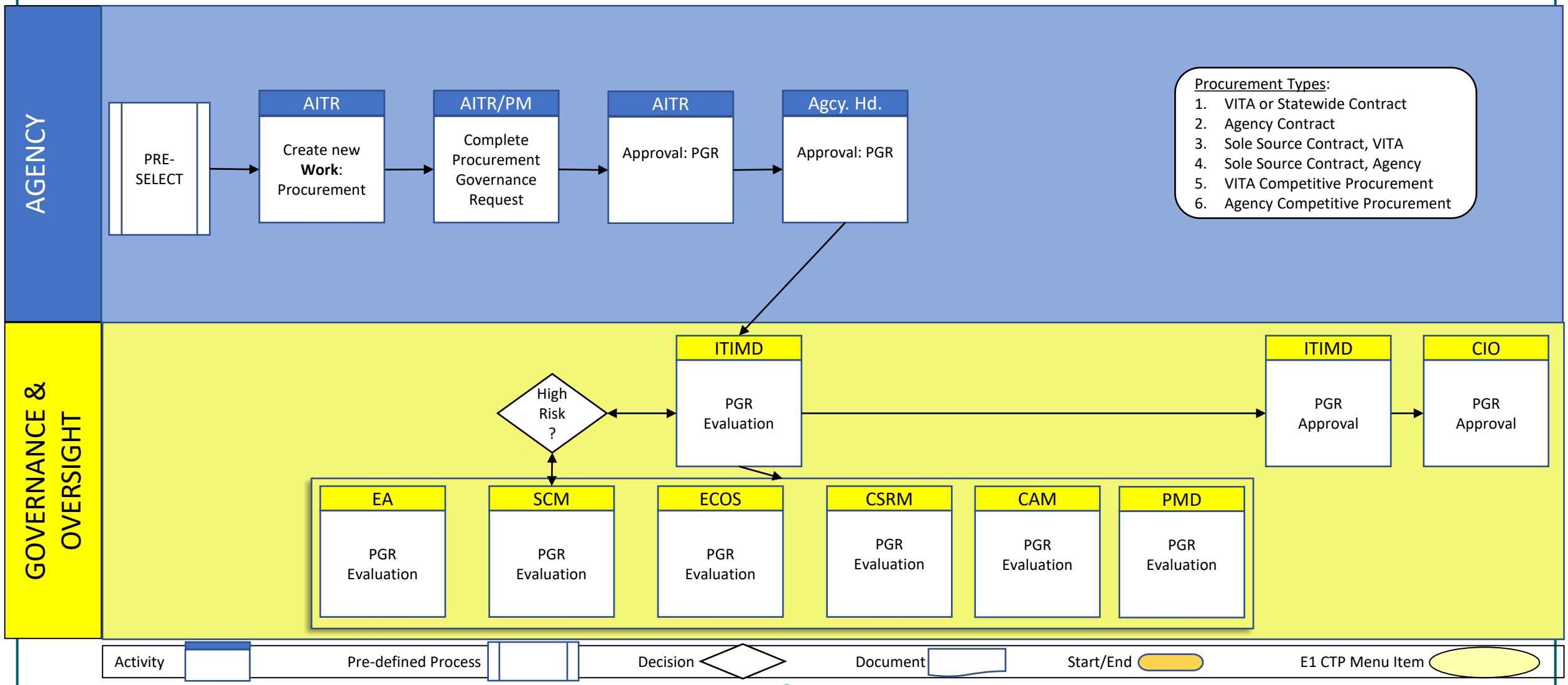
1. Just like IT Projects, IT Procurements >$250,000 require Governance & Oversight

2. The ITIM Lifecycle is administered through **CTP**:

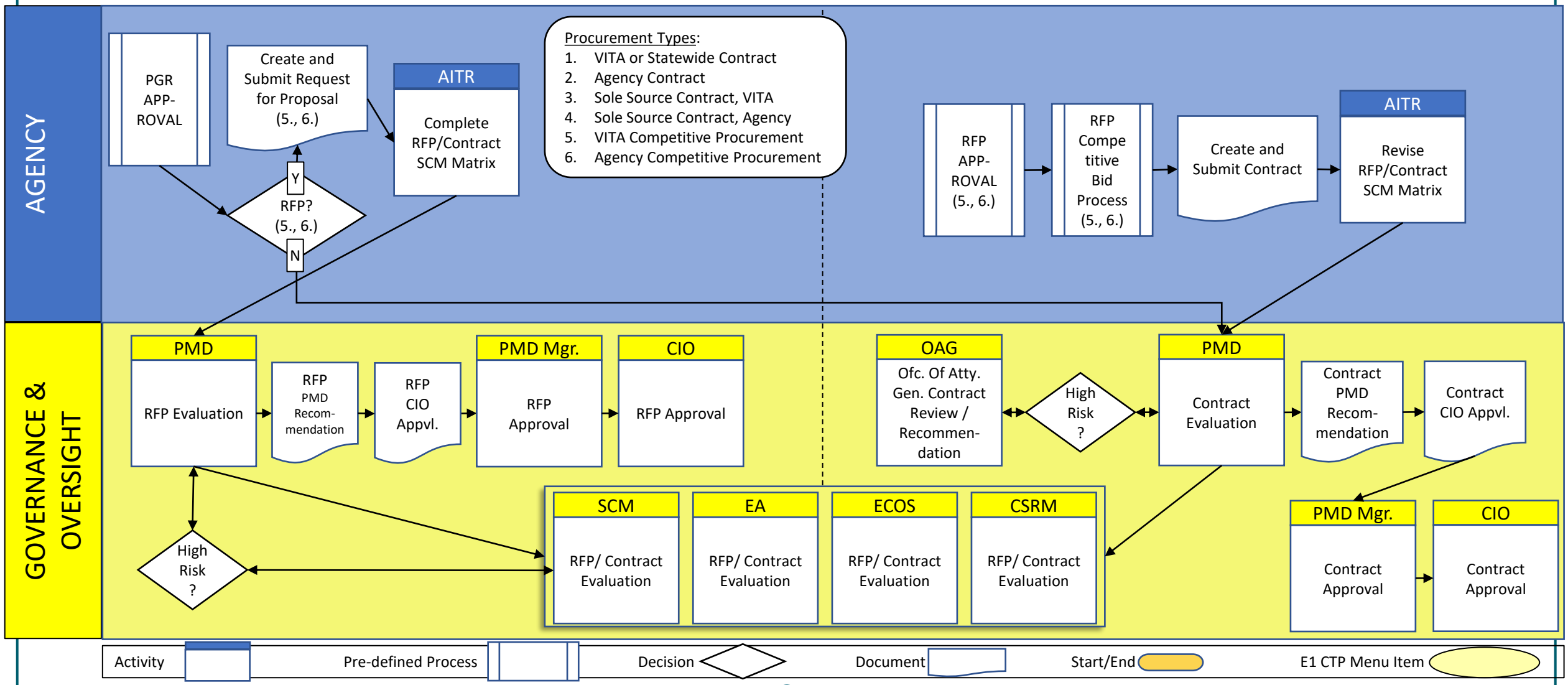
   1. **BRT**: AITR, Agency Head approval
   2. **PGR**: AITR, Agency Head approval, VITA SME review, CIO approval
   3. **RFP**: **(≥$1M)** VITA SME review, CIO approval
   4. **Contract**: **(≥$1M)** OAG review, VITA SME review, CIO approval
   5. **SOW**: **(≥$1M)** VITA SME review, CIO approval



Select + Control (Procurement Governance)

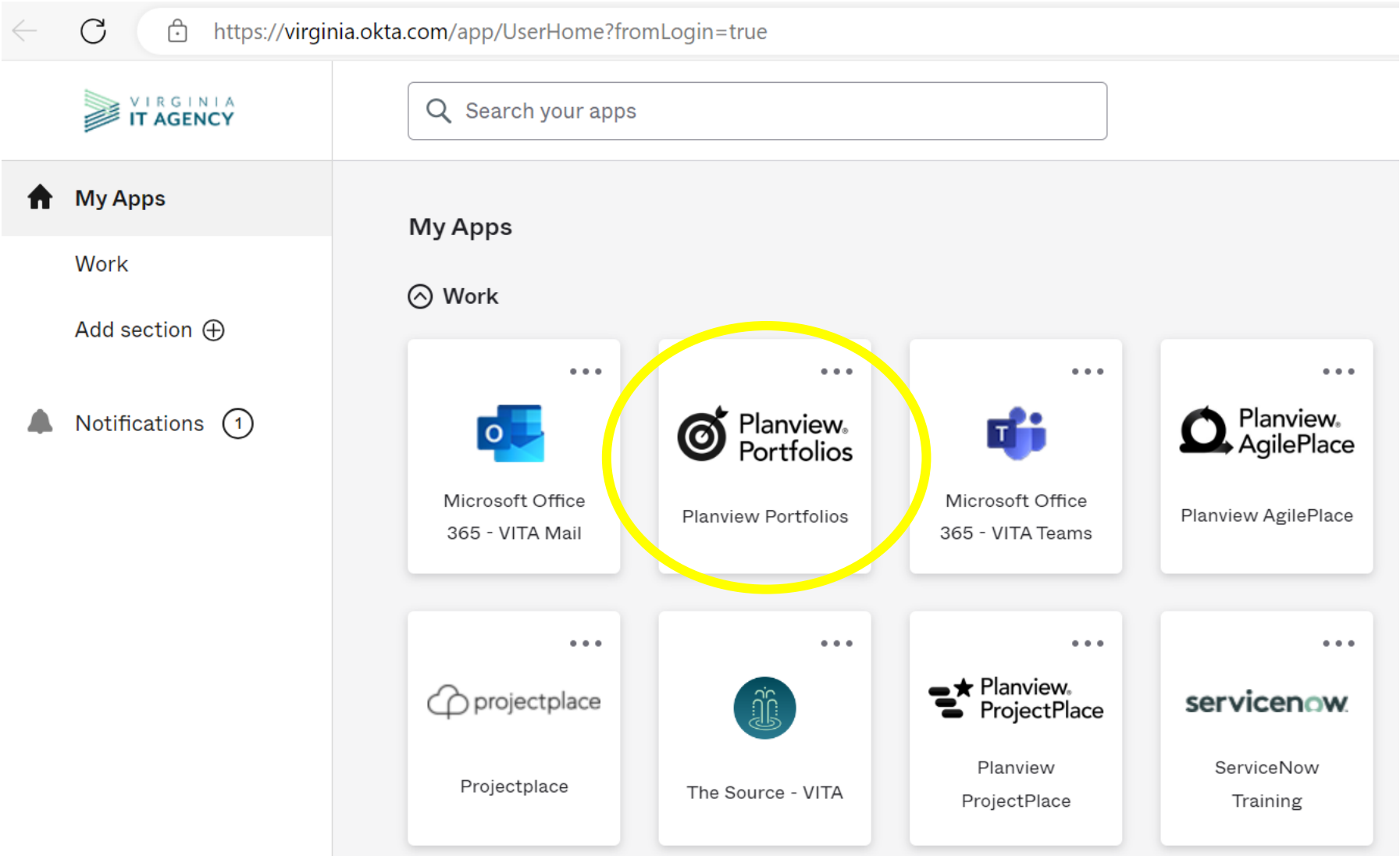


Control/Initiation (RFP/Contract Governance)



Wrap-up

1. Help resources
2. Scenarios
3. Next Steps

Single Sign-on (SSO)

- Use Chrome or Edge browser - - not IE!