VIRGINIA IT AGENCY

Commonwealth Technology Portfolio (CTP)

CTP Training for IT Project Managers

Pat Reynolds

VITA Project Management Division

Version 7.2

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 <u>built into the tool</u>.

2. CTP is <u>mostly</u> 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 <u>satisfies</u> 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)

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

Pre-Select → Select → Control → Evaluate

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

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

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CTP E1 Basic Navigation

1. Highlights

2. Login

3. Basic Navigation

    A.   Primary Navigation Bar

    B.   My Overview

    C.   Work View

        i.   Ribbon, Tiles
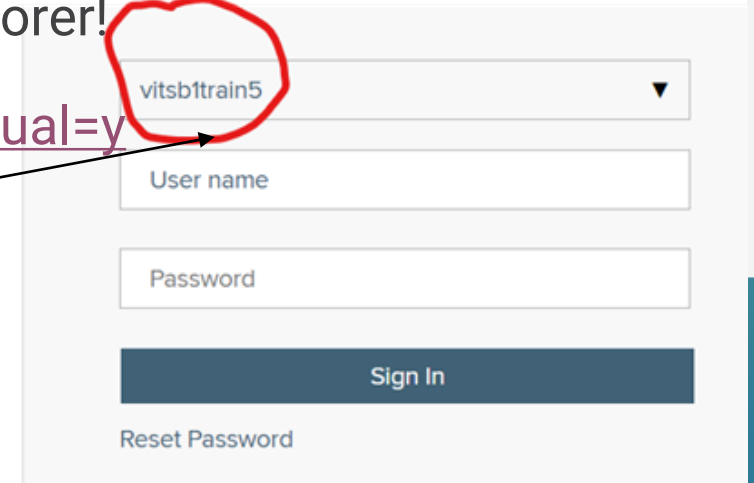
       ii.   Sub – menu

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 <u>Chrome</u> or <u>Edge</u> only - - NOT Internet Explorer!

2. https://covactp-sb.pvcloud.com/testing/login/body.asp?manual=y

3. Environment: VITSB1TRAIN**5**   (aka "<u>TRAIN5</u>")

4. User name: <u>Student01</u>, Student02, Student03, ….etc.

5. Password: <u>train01</u>   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.)

vitsb1train5

User name

Password

Sign In

Reset Password

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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"

Active Tile
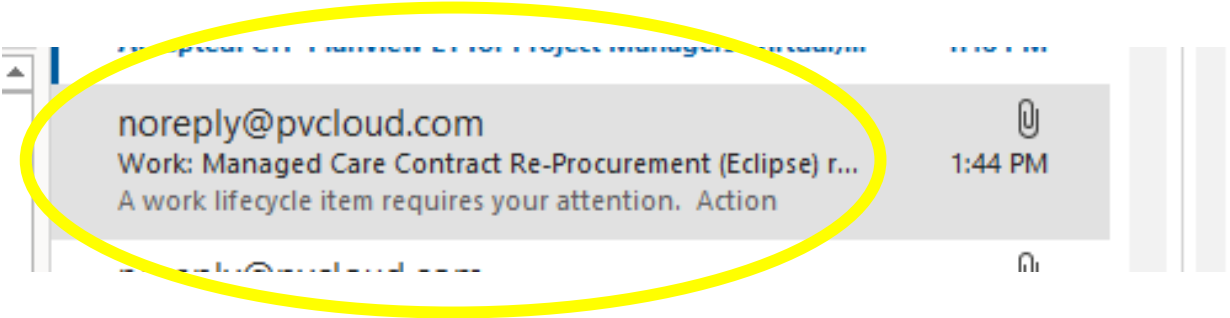
Tiles

Search

My Account

...banner...

ribbon...

Lifecycle Step

Entity

View Lifecycle

Email Notification

noreply@pvcloud.com
Work: Managed Care Contract Re-Procurement (Eclipse) r...
A work lifecycle item requires your attention. Action

1:44 PM

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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

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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
IBC - Scope for Class Project

Save as Draft   Save and Complete   Cancel   Review Lifecycle Step   *Required Fields   Collapse All
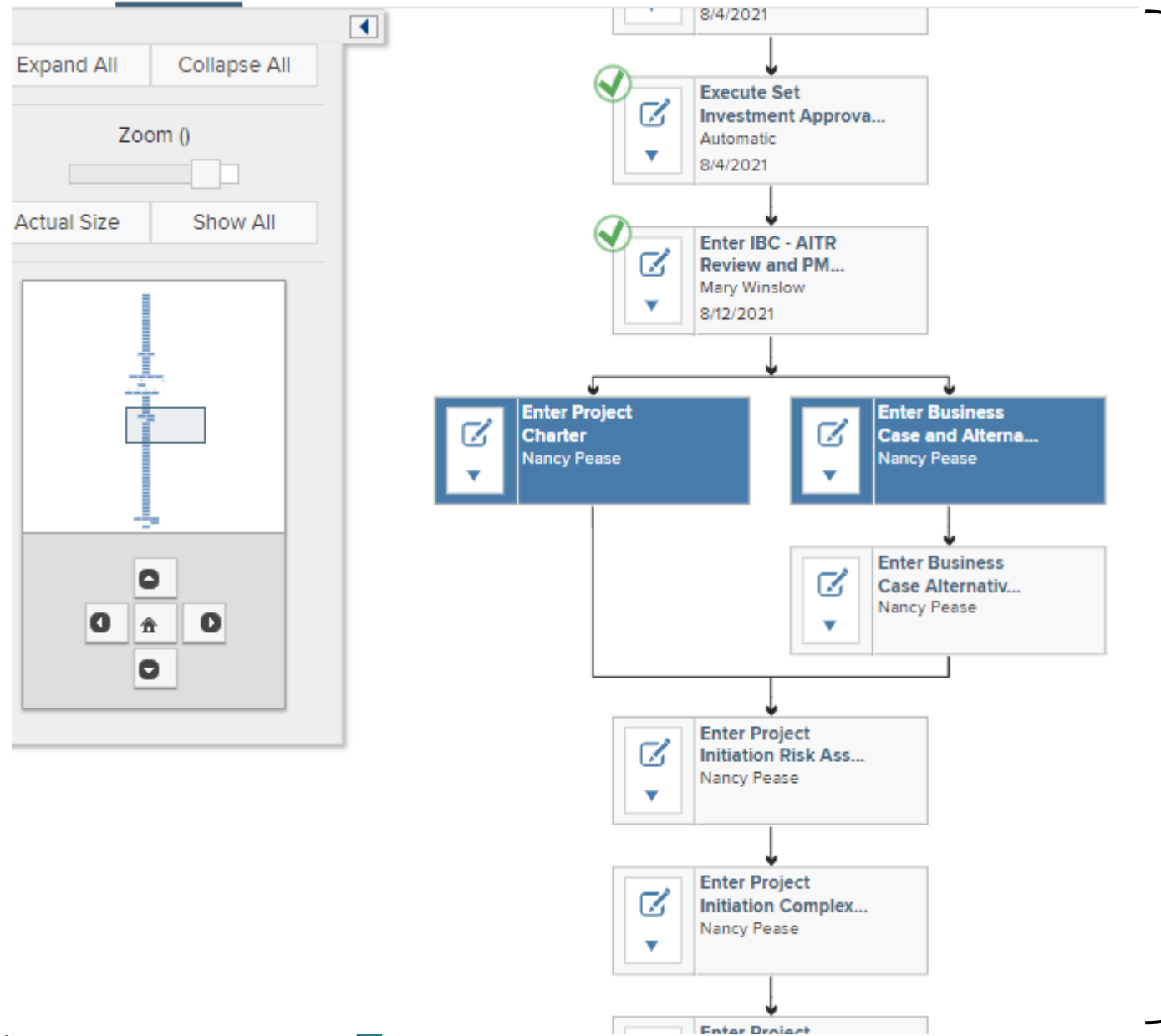
Scope

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.

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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.

Expand All   Collapse All

Zoom ()

Actual Size   Show All

8/4/2021

✓ **Execute Set Investment Approva...**
Automatic
8/4/2021

✓ **Enter IBC - AITR Review and PM...**
Mary Winslow
8/12/2021

Enter Project Charter
Nancy Pease

Enter Business Case and Alterna...
Nancy Pease

Enter Business Case Alternativ...
Nancy Pease

Enter Project Initiation Risk Ass...
Nancy Pease

Enter Project Initiation Complex...
Nancy Pease

Enter Project

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

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Top Tip: Active Lifecycle Steps

- Shows current steps in the item Lifecycle.

- Work View > Active Lifecycle Steps (tile)

IT Investment Management (ITIM) Lifecycle: IT Project >$250,000

Identify business needs

Add proposed projects to Wish List

Choose 1 from Wish List to move forward

Initiate, Plan, Execute and Deliver new product or service

How well is the new product or service working out?

1.0 Pre-Select | **2.0 Select** | **3.0 Control** | **4.0 Evaluate**

Key Artifacts:

- Business Requirement for Technology (BRT)
- Investment Business Case (IBC)
- Project Charter
- Detailed Project Plan
- Status Reports
- Closeout Report
- Post Implementation Review (PIR)

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ITIM Lifecycle: 2.0 Select

1. 2.0 Select: Investment Business Case: *This is how we establish a Proposed Project*

2. <u>Demonstration</u>: 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. <u>Student Exercise</u>: IBC

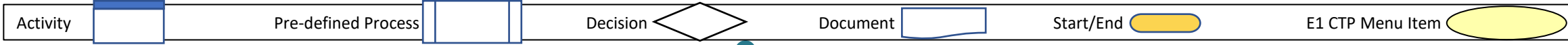   A. Student01 - - -> Student 01 Project; Agency 000; Secretariat 000; AITR & Agency Head: "**Training Admin**"

1.0 Pre-Select

2.0 Select

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GOVERNANCE & OVERSIGHT

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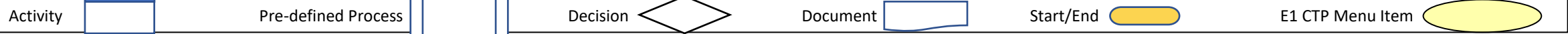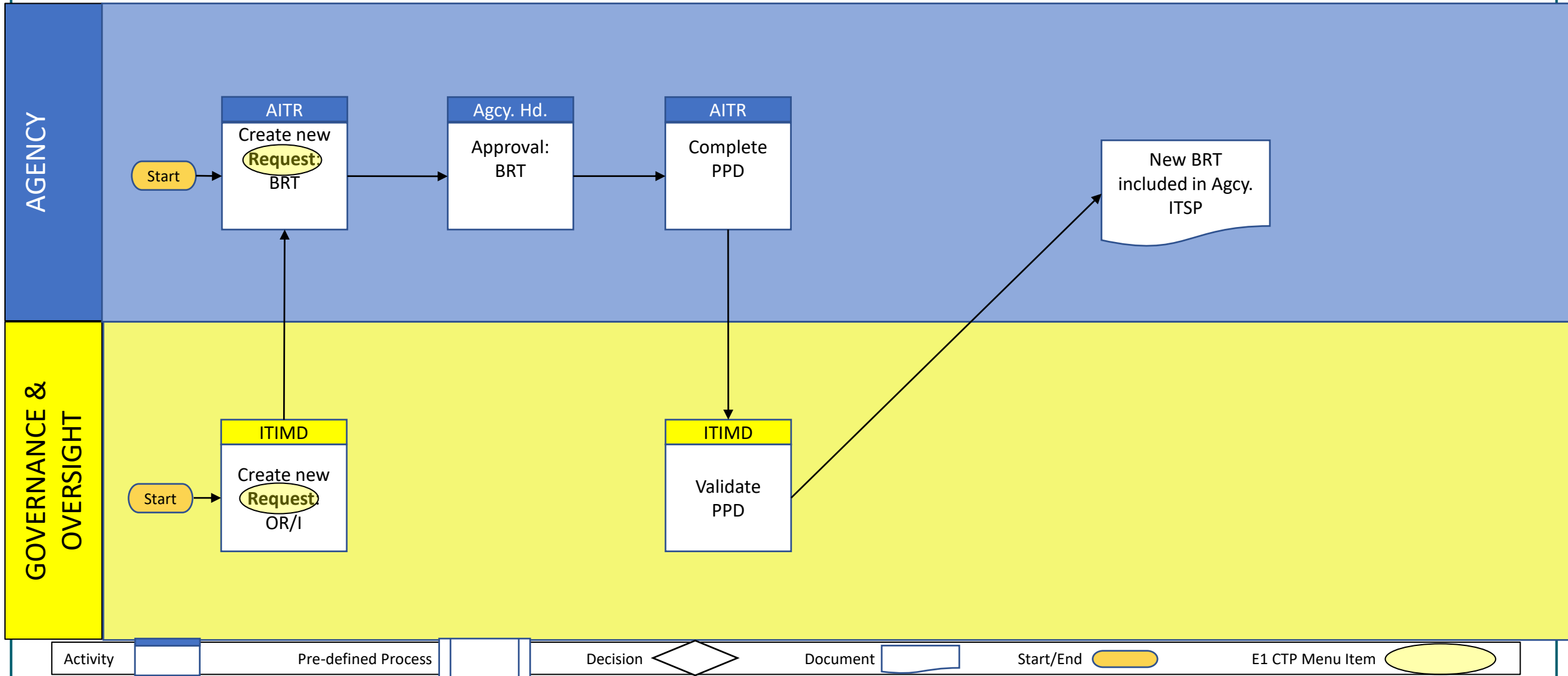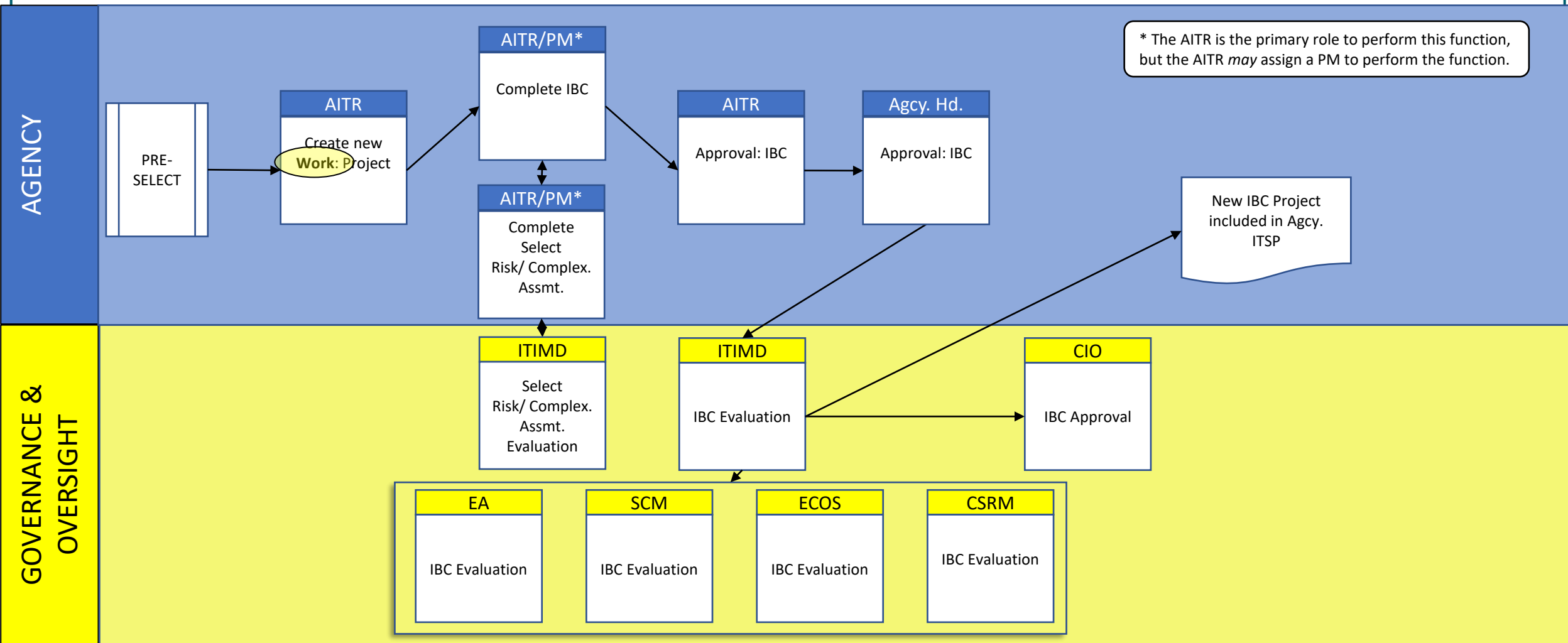
* The AITR is the primary role to perform this function, but the AITR *may* assign a PM to perform the function.

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

Activity   Pre-defined Process   Decision   Document   Start/End   E1 CTP Menu Item

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Data Picker

- Allows only <u>valid values</u>

Find your Work Item

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

- ...or do a keyword search

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Sub-menu

- Typical menu items:

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Document Repository

Financials

- Clean up your view

Project
Class Example - Project

View
Financial Planning Detail

| Detail ▾ | All Available Account Lines ▾ | Currency | Effort | FTLs | 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…
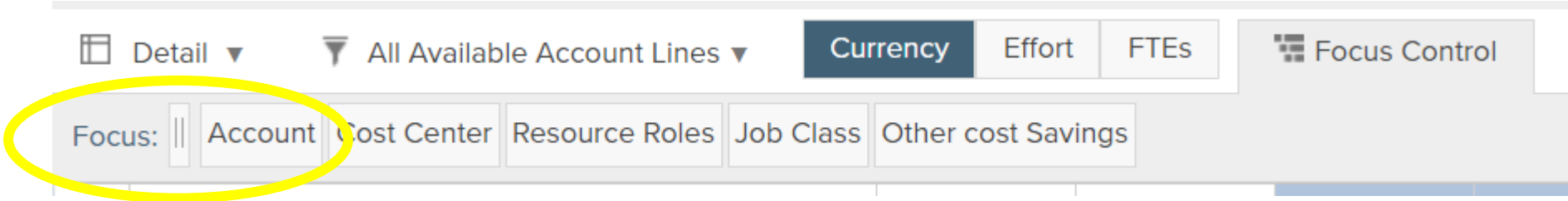
  - To this…
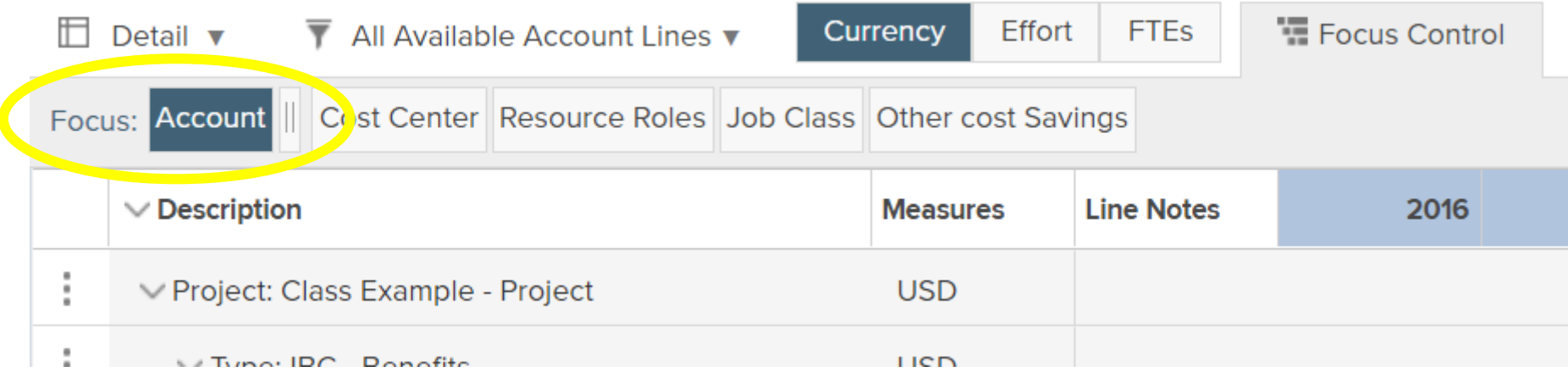
Financials

- Display Preferences

  - From this…

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

Version
Actual/Forecast (forecast) ▾

Enter text to filter grid   Months ▾   ⚙   ⬇ ▾

| 18 | 2019 | 2020 | 2021 | 2022 | 2023 | 2024 |

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

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Financials

- Display Preferences
  - To this…

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

Version
Actual/Forecast (forec

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 <u>impacted</u> by the "Custom periods" <u>date range</u>;
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.

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Financials

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

- From this...

- To this...

- To this...

Financials

- ## Major IT Project, General Funds

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		222,222.0(	222,222.0(	.44,444.00
> Other	USD				
> Type: Funding Need	USD				

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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

Initiate

Detailed Planning

Execute & Control

Closeout

IBC: Investment Business Case Approval

Procure-ment as needed:

- PGR ->

- RFP ->

- Contract**

PIA: Project Initiation Approval*

Control Project

Status Report

Detailed Planning Approval

Manage Risks Issues Changes

Deliver Product or Service

Closeout Report

*NOTE: Projects are designated "active" upon Project Initiation Approval.   **NOTE: Contract may only be signed AFTER Project Initiation Approval.

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3.0 Control/Initiation (Project)

AGENCY

- SELECT
- PM — Complete Project Charter
- Bus. Spon. — Approval: Charter
- Agcy. Hd. — Approval: Charter
- PM — Complete BCAA
- PM — Upload CBA.xlsx
- PM — Upload ORG Chart.pptx
- PM — Complete Initiation Risk/ Complex. Assmt.
- New Active Project included in Agcy. ITSP

GOVERNANCE & OVERSIGHT

- PMD — Charter Evaluation
- PMD — Upload Balanced Scorecard .xlsx
- SOC — Charter Evaluation/ Recommen-dation
- PMD Mgr. — Charter Approval
- CIO — Charter Approval

Legend: Activity | Pre-defined Process | Decision | Document | Start/End | E1 CTP Menu Item

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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
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

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Cost-Benefit Analysis (CBA)
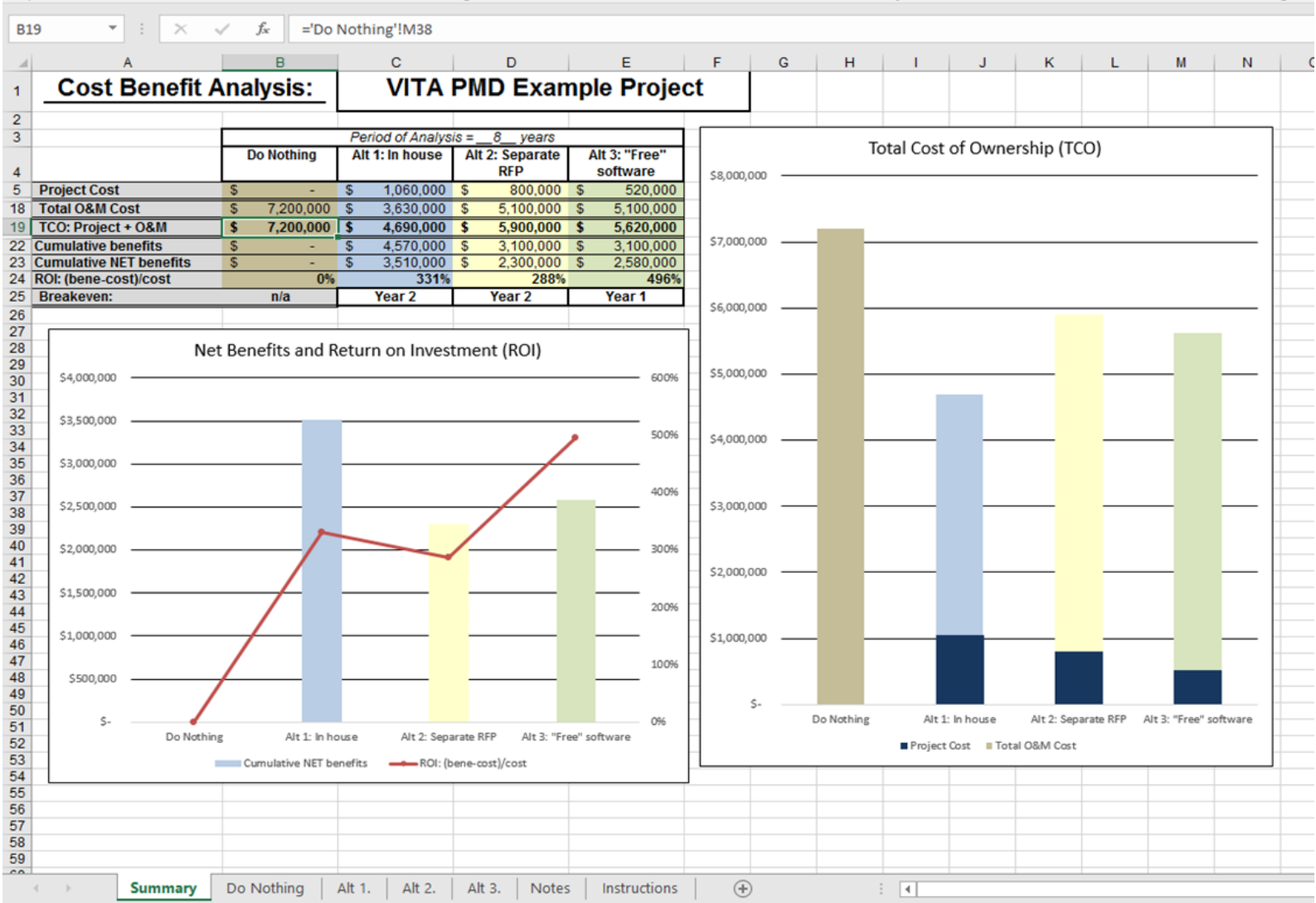
Financials

- 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			
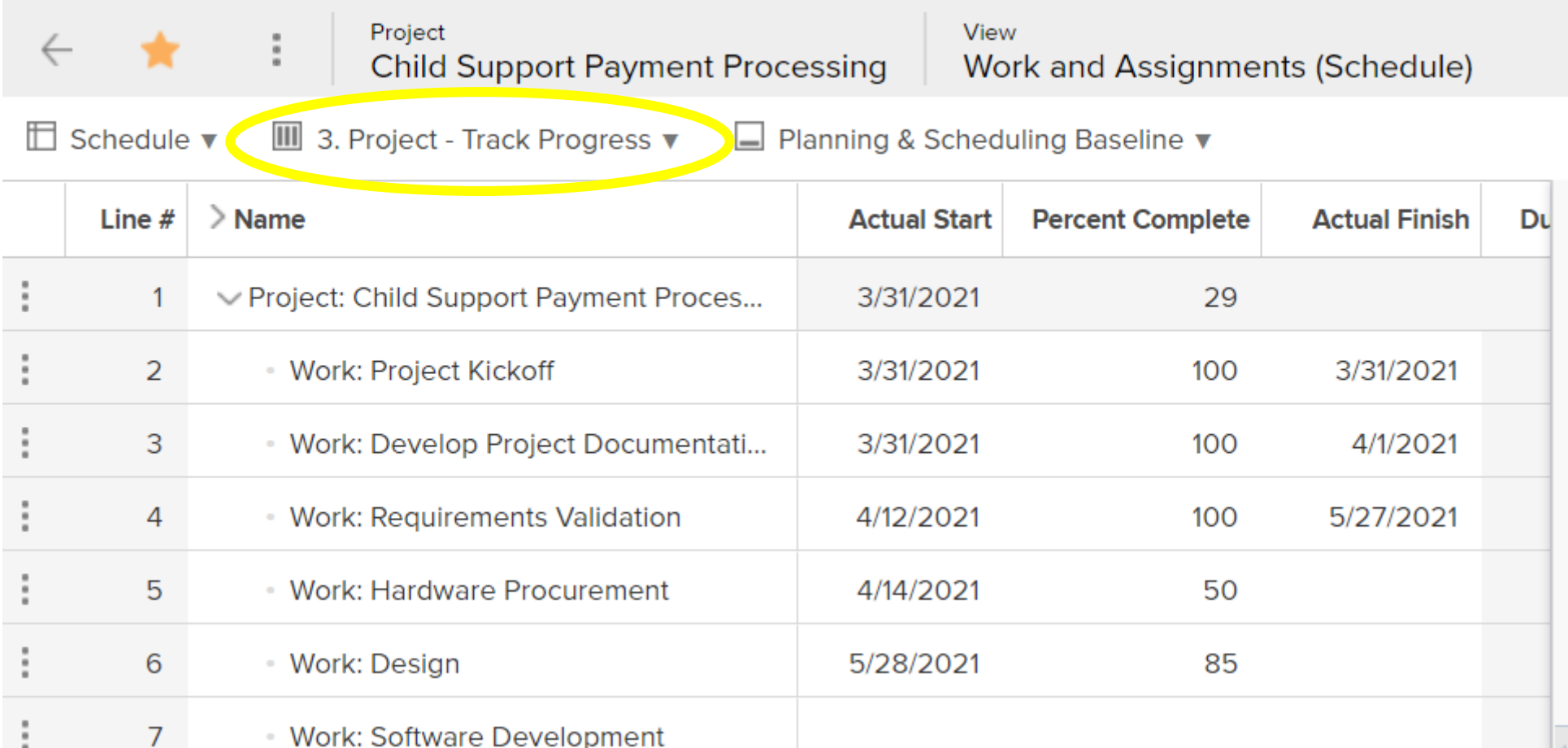
Plan

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

Project	View
Child Support Payment Processing	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

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Plan

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

Plan

- Reveal / Hide Columns

Plan

- Tasks: Insert, Insert Under
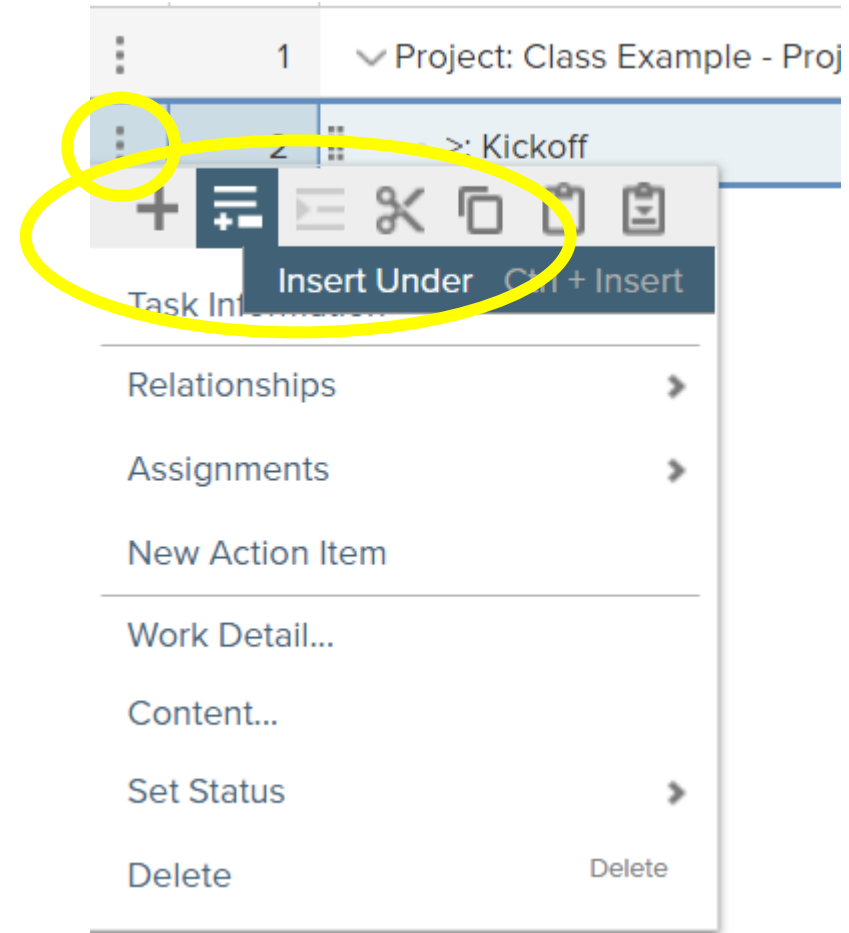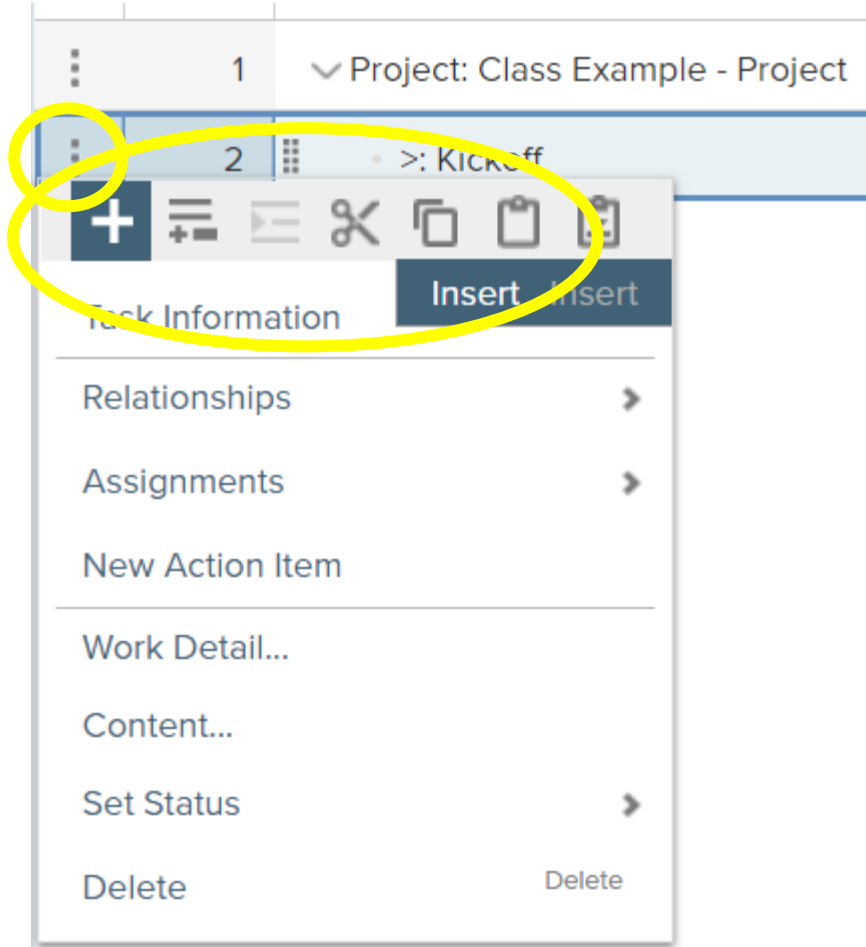
ITIM Lifecycle: 3.0 Control: Detailed Planning

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)

AGENCY

PROJECT INITIATION APPROVAL (PIA)

PM — Complete Project Plan

PM	PM	PM	PM	PM	PM	PM	PM	PM
Complete Proj. Scope & Bus. Obj. Worksheet	Complete Project (Schedule)	Upload MS Project.mpp	Upload WBS.pptx*	Upload OBS.pptx*	Upload ADSW.pdf*	Complete Resource Plan	Complete Risk Mgt. Plan	Complete Procurement Plan (as needed)

PM	PM	PM	PM	PM	PM	PM	PM	Bus. Spon.	Agcy. Hd.
Complete Communi-cation Plan	Complete Quality Mgt. & IV&V Plan	Complete Change & Config. Mgt. Plan	Upload Org. Chg. Mgt. Plan	Complete Performance Plan	Complete Planning Risk & Complexity Assmt.	Complete Budget Plan (Financials)	Complete Project Plan Summary	IAOC Approval: Project Plan	Approval: Project Plan

GOVERNANCE & OVERSIGHT

- WBS: Work Breakdown Structure
- OBS: Organization Work Breakdown Structure
- ADSW: Activity Definition and Sequencing Worksheet

PMD — Detailed Project Plan Evaluation & Approval

Activity	Pre-defined Process	Decision	Document	Start/End	E1 CTP Menu Item

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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

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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. <u>Demonstration:</u> Project Status Reporting

3. Risk Management

4. Issue Management

5. Change Control Request

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3.0 Control/Execution & Control (Project)

AGENCY

PROJ. Det. Plan APPVL.	PM	Bus. Spon.	Secretariat		PM	PM	PM
	Update Project Status	Review/ Approve Status Report	Review/ Approve Status Report		Maintain Risk Log: (+Risk)	Maintain Issue Log: (+Issue)	Manage Change Log:: (+Change)

GOVERNANCE & OVERSIGHT

PMD	PMD Mgr.	
Review Status Report & Assess Project	Review/ Approve Status Report	CIO Program Review Report

Activity	Pre-defined Process	Decision	Document	Start/End	E1 CTP Menu Item

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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

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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
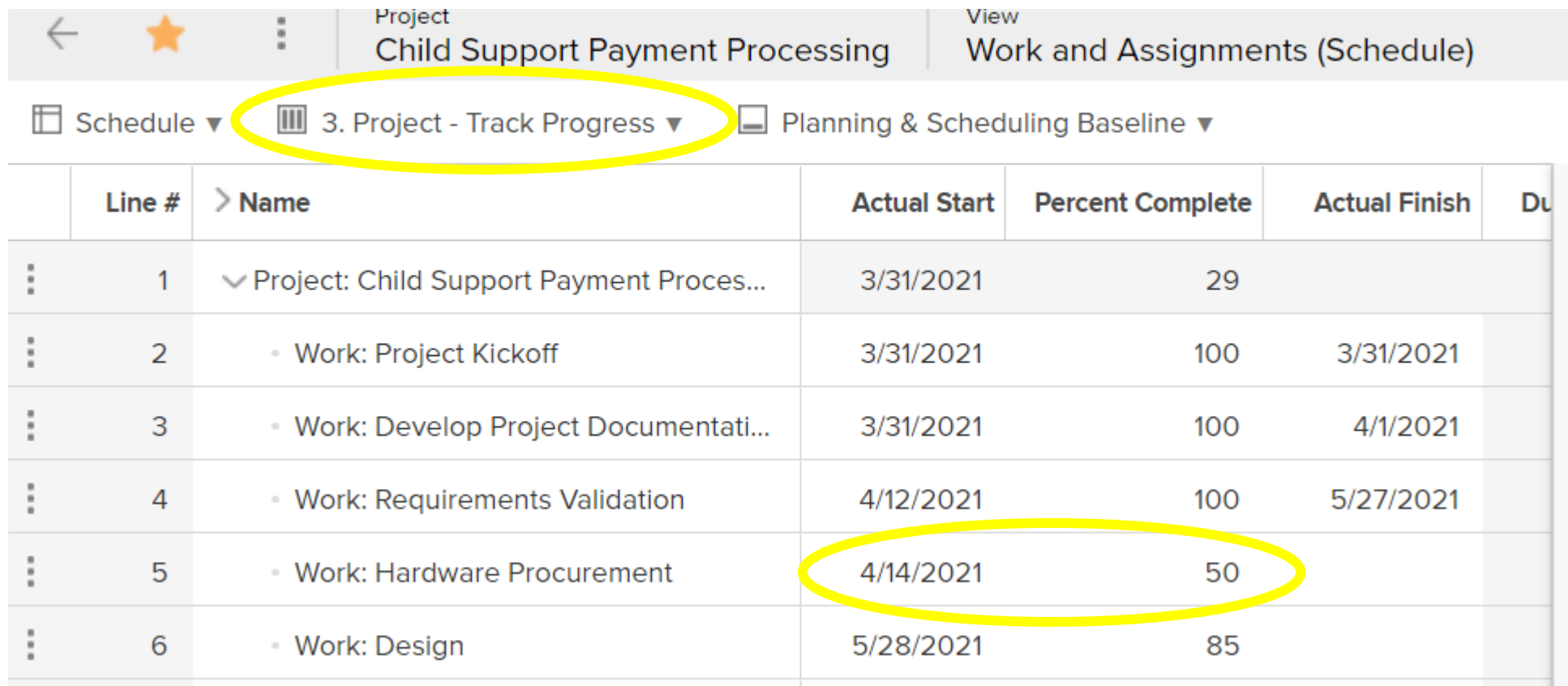- <<Project Sponsor Assessment>>
- <<Secretariat Status Assessment>>
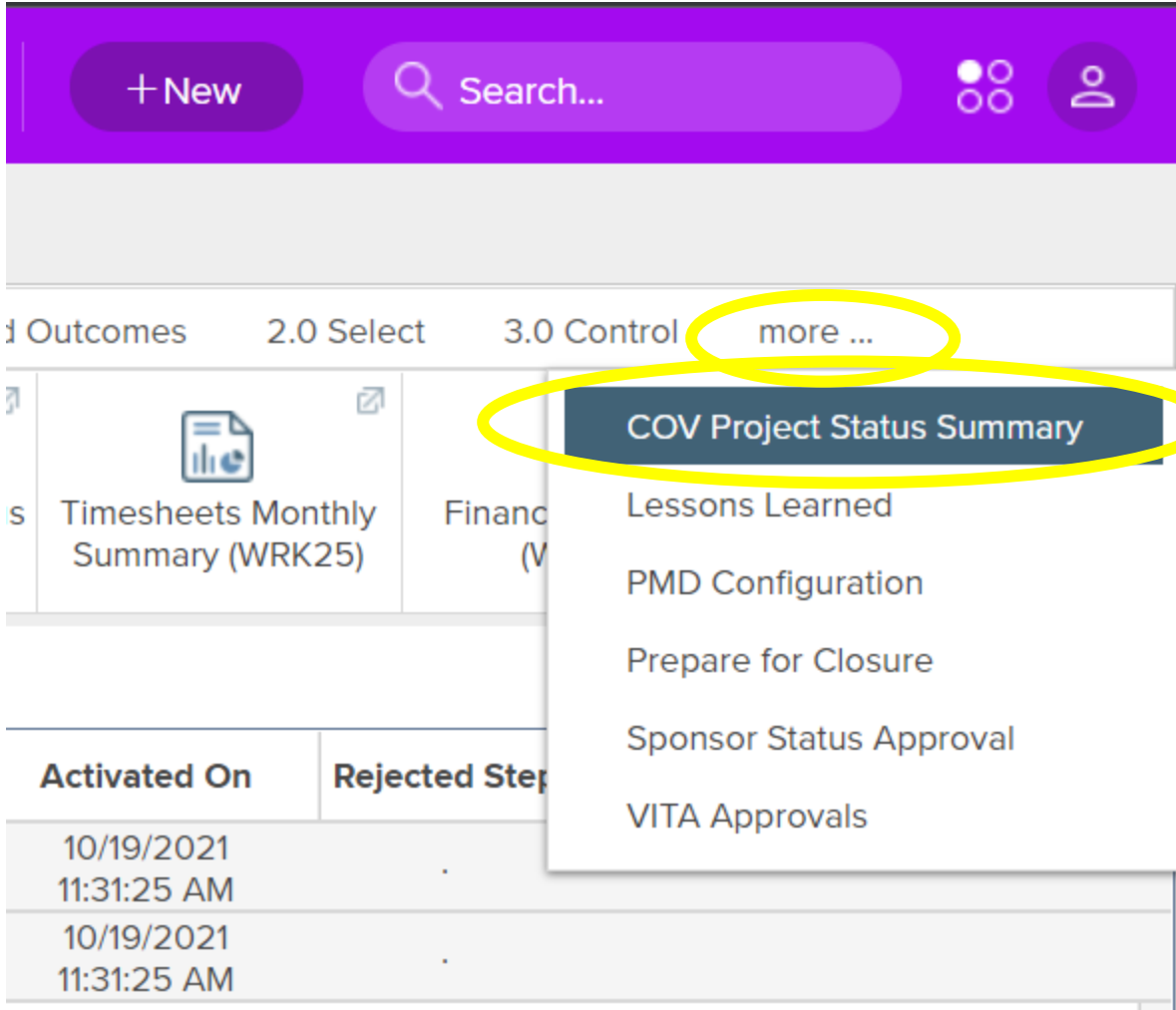
Project Status: Financials

- Use Actual/Forecast (forecast) version!
- Update each month / budget category with Actual Spend
  - •<mark>Overwrite</mark> the <mark>forecasted</mark> spend with the <mark>actual</mark> 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

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)

AGENCY

NEW PROD. OR SVC. ROLL-OUT

PM
Create Closeout Report

Bus. Spon.
IAOC Review/Appv. Closeout Report

Agcy. Hd.
Review/Appv. Closeout Report

GOVERNANCE & OVERSIGHT

PMD
Review / Approve Closeout

PMD Mgr.
Review/ Approve Status Report o.b.o. CIO

End

Activity		Pre-defined Process		Decision	Document	Start/End	E1 CTP Menu Item
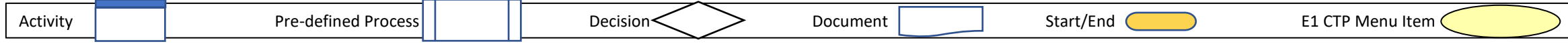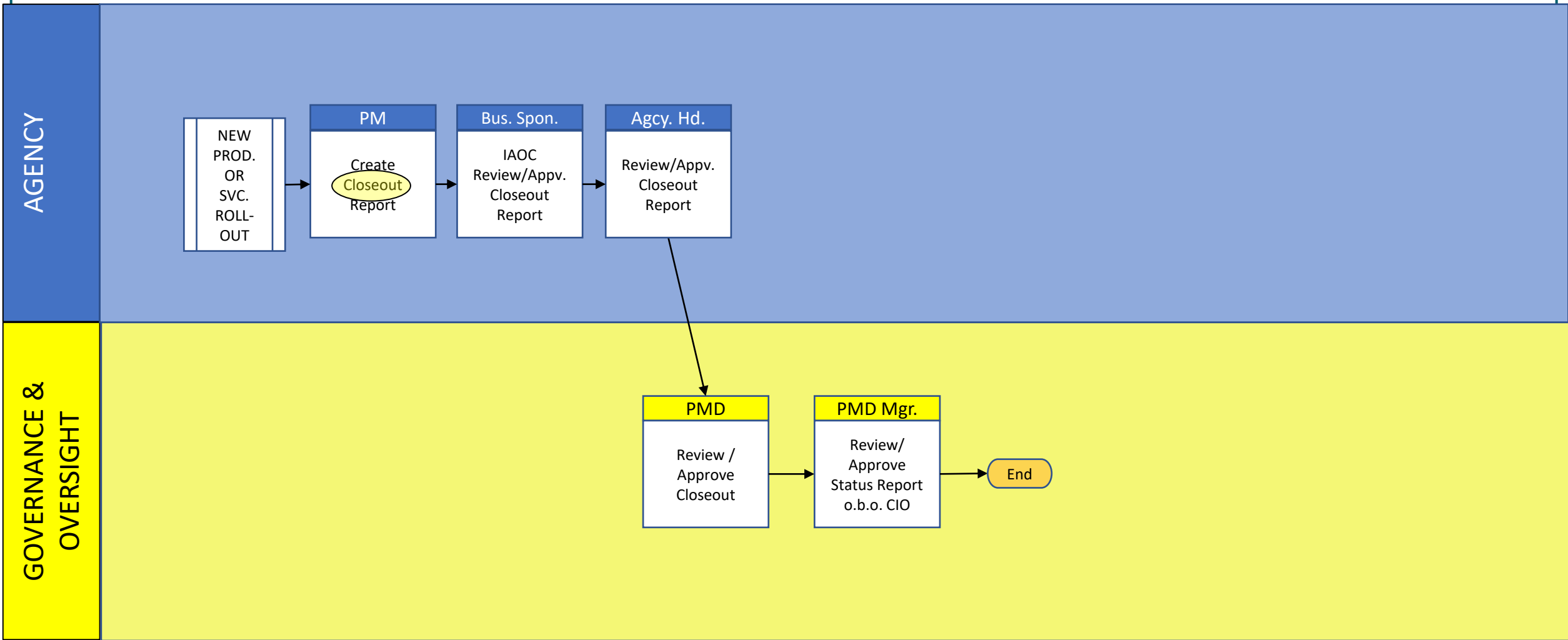
Closeout: Differences by Project Category

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)

AGENCY

PROJECT CLOSE-OUT

IAOC
Upload

Post Impl. Report.docx

GOVERNANCE & OVERSIGHT

ITIMD

Review / Archive PIR

End

Activity	Pre-defined Process	Decision	Document	Start/End	E1 CTP Menu Item

vita.virginia.gov | Virginia IT Agency

VIRGINIA IT AGENCY

vita.virginia.gov

ITIM Methodology for IT Procurements (≥$250,000)
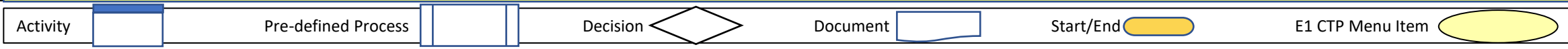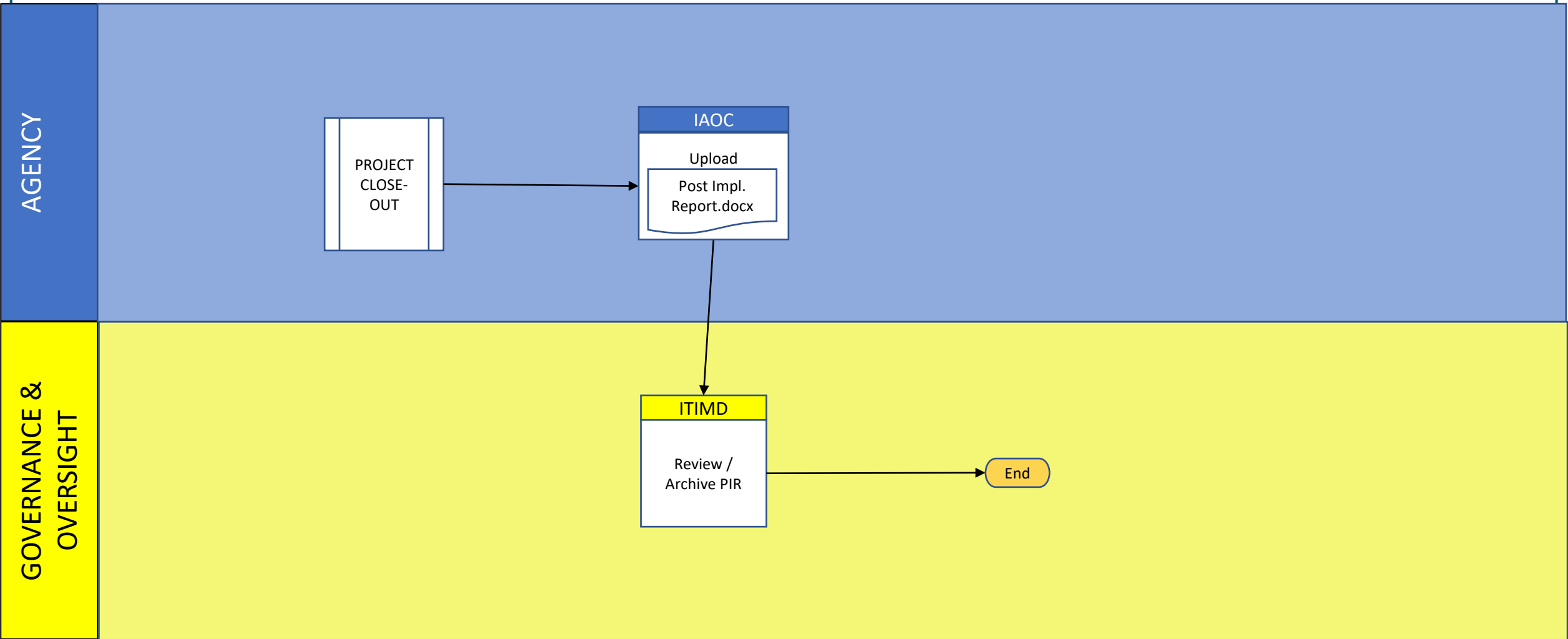
1. April 2022: Significantly consolidated, shortened IT Procurement Lifecycle!

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 >$250,000

Identify business needs

Add proposed procurements to Wish List

Choose 1 from Wish List to move forward

RFP, Contract, SOW, etc.

Pre-Select → **Select** → **Control** → **Evaluate**

Key Artifacts:

Business Requirement for Technology (BRT)

Procurement Governance Request (PGR)

RFP, Contract, SOW, etc.

VIRGINIA IT AGENCY
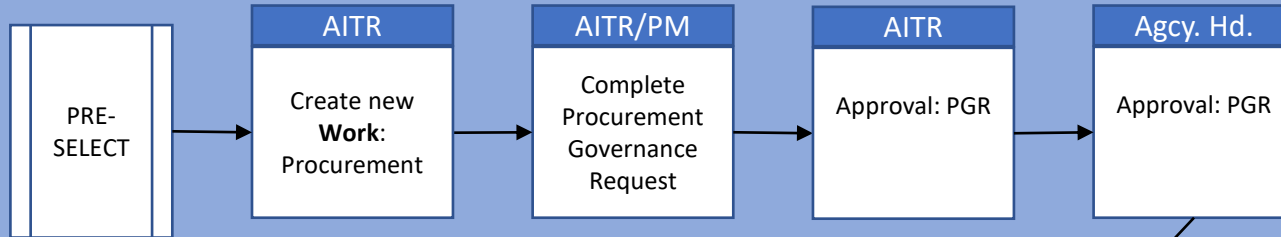
vita.virginia.gov
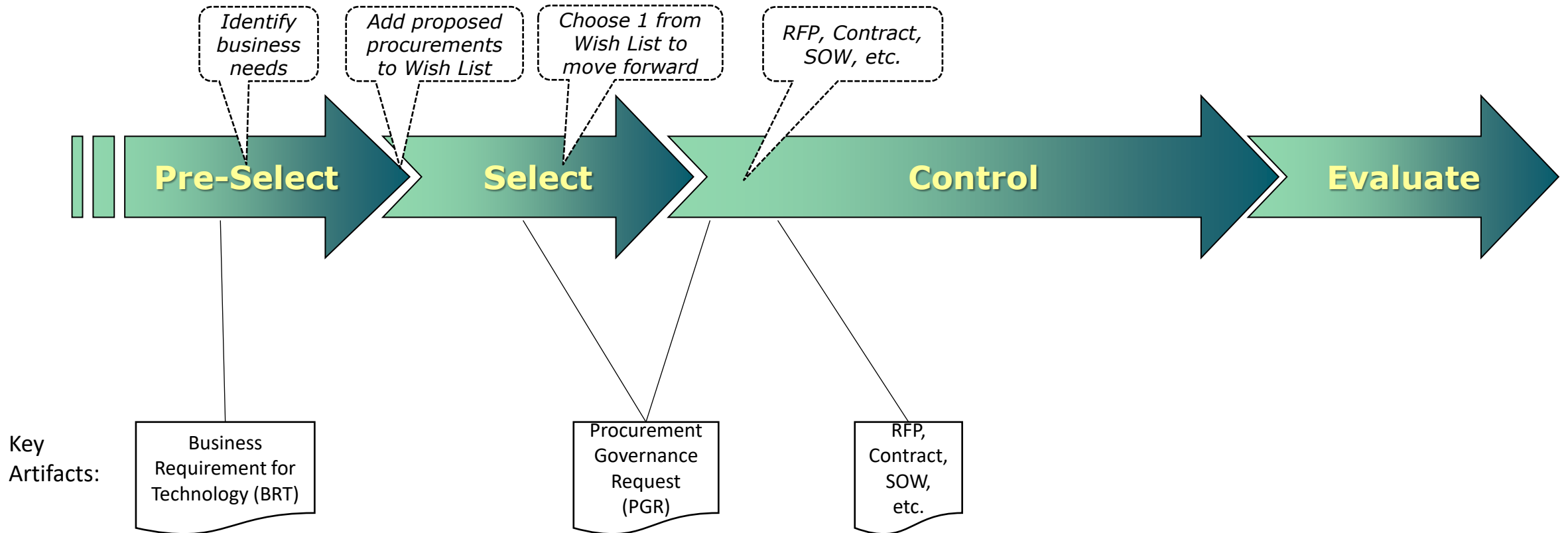
ITIM Lifecycle (Procurement): Control

1. Control: Procurement Governance Request: *Path to initiating IT Procurement activities*

2. <u>Demonstration</u>: Procurement Governance Request

3. <u>Student Exercise</u>: PGR

   A. Student 01 - - - -> Student 01 Procurement

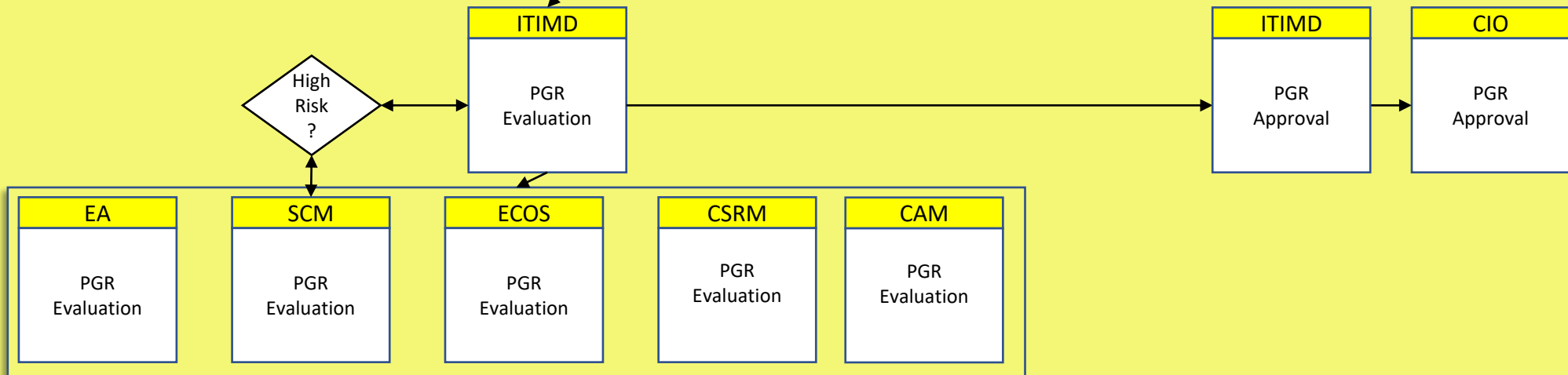4. RFP: Request for Proposal (leading to an IT Contract)

5. IT Contracts

Select + Control (Procurement Governance)

AGENCY

PRE-SELECT

AITR → Create new **Work**: Procurement

AITR/PM → Complete Procurement Governance Request

AITR → Approval: PGR

Agcy. Hd. → Approval: PGR

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

GOVERNANCE & OVERSIGHT

High Risk ?

ITIMD — PGR Evaluation

EA — PGR Evaluation

SCM — PGR Evaluation

ECOS — PGR Evaluation

CSRM — PGR Evaluation

CAM — PGR Evaluation

ITIMD — PGR Approval

CIO — PGR Approval

Activity	Pre-defined Process	Decision	Document	Start/End	E1 CTP Menu Item

Virginia IT AGENCY

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Portfolio Menu

- Work Portfolios

Portfolio: Collection of Work Items

- Click on:
- Planview Portfolio
- Menu > Work
- Work Portfolio > Training Portfolio (Shared)

Financials

- 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 Procureme…	USD		11,111.00	22,222.00	33,333.00
⋮	>>> Non-Major Stand Alone IT Procur…	USD				
⋮	>>> Agency-Level Stand Alone IT Pro…	USD				

Financials

- 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)

AGENCY

PGR APP-ROVAL

Create and Submit Request for Proposal (5., 6.)

AITR
Complete RFP/Contract SCM Matrix

RFP? (5., 6.) — Y / N

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

RFP APP-ROVAL (5., 6.)

RFP Competitive Bid Process (5., 6.)

Create and Submit Contract

AITR
Revise RFP/Contract SCM Matrix

GOVERNANCE & OVERSIGHT

PMD
RFP Evaluation

RFP Decision Paper

RFP CIO Appvl.

PMD Mgr.
RFP Approval

CIO
RFP Approval

OAG
Ofc. Of Atty. Gen. Contract Review / Recommen-dation

High Risk ?

PMD
Contract Evaluation

Contract Decision Paper

Contract CIO Appvl.

High Risk ?

SCM
RFP/ Contract Evaluation

EA
RFP/ Contract Evaluation

ECOS
RFP/ Contract Evaluation

CSRM
RFP/ Contract Evaluation

PMD Mgr.
Contract Approval

CIO
Contract Approval

Activity | Pre-defined Process | Decision | Document | Start/End | E1 CTP Menu Item

Wrap-up

1. Help resources

2. Scenarios

3. Next Steps

Single Sign-on (SSO)

- Use Chrome or Edge browser - - not IE!