

## Project Lifecycle Exercises

Your role is Project Manager (PM); the trainer will perform other roles, such as AITR, Agency Head, etc.

Color Key:

**+ New** (green): CTP Enterprise One menu item / button / action / column header

**General Information** (blue): CTP Enterprise One screen / window / form

**|** = required field

*The italicized steps have already been completed to set up your exercise.*

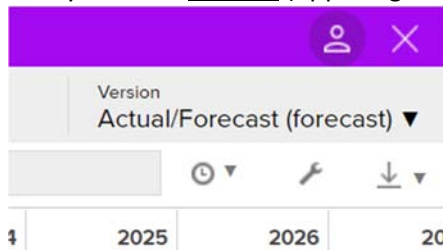
### 1. Investment Business Case (IBC) Exercise

1. AITR: **+ New** > *New Work*
  - a. *Fill out required fields (“Commonwealth Project”)*
  - b. *Continue; exit out of window*
2. AITR: The next **Lifecycle Step** is presented to you: (**IBC - General Information**)
  - a. *Fill out required fields*
  - b. *Note that the “Service Areas” section requires you to choose from a pre-defined list. Click “Maintain Selections” button; use Data Picker to select one or more Service Area for your project. Click OK to exit the Data Picker.*
  - c. **Save & Complete**. *This will trigger the next step, which belongs to the AITR.*
3. AITR: *Allocate to Strategy*
  - a. **Save & Complete**. *This will trigger the next step, which belongs to the PM.*
4. AITR: *Assign PM (in Lifecycle view) the next eight subsequent Lifecycle steps.*
5. PM: Look in My Overview for next step. Click on Lifecycle Step. (**Enter Scope**)
  - a. *Fill out required fields.*
  - b. *Save & Complete.*
  - c. *The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform that step.*
6. PM: Look in My Overview for next step. Click on Lifecycle Step. (**IBC - Benefits**)
  - a. *Fill out required fields.*
  - b. *Save & Complete.*
  - c. *The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.*
7. PM: Look in My Overview for next step. Click on Lifecycle Step. (**IBC - Technical Feasibility**)
  - a. *Fill out required fields.*
  - b. *Save & Complete.*
  - c. *The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.*

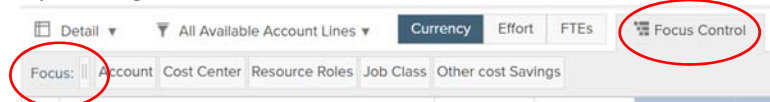
8. PM: Look in My Overview for next step. Click on Lifecycle Step. (IBC - Governance and Oversight)
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
9. PM: Look in My Overview for next step. Click on Lifecycle Step. (Select Risk Assessment)
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
10. PM: Look in My Overview for next step. Click on Lifecycle Step. (Select Complexity Assessment)
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
11. PM: Look in My Overview for next step. Click on Lifecycle Step. (Select R/C Summary)
  - a. Review, Save & Complete.
  - b. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
12. PM: Look in My Overview for next step. Click on Lifecycle Step. (IBC Funding)
  - a. Fill out required fields.
  - b. Financial Planning Detail:
    - i. Typically, AITRs take care of this, but some agencies delegate this to the Project Manager.
    - ii. At the bottom of the IBC Funding screen, click on the Financial Planning Detail button, which will open up a separate screen.

Financial Planning Detail

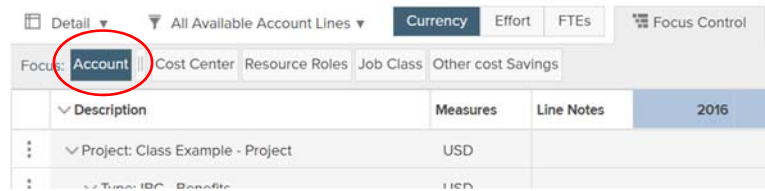
- iii. Verify that the Version (upper right of screen) is “Actual/Forecast (forecast)”



- iv. Set the Focus Control: This creates logical groupings of the rows.
- v. Note: Without Focus Control, the rows are not grouped in a helpful way.
- vi. By clicking on the Focus Control, it reveals this:



- vii. Click and drag the “Account” tile to the left of the “| |” tile; then the FPD rows will be grouped logically. You may now click on “Focus Control” to make the Focus choices disappear; you will not have to adjust this feature again.



- viii. Clock icon: (Timescale): (upper right of screen) You may choose to display month, quarter or year.
- ix. Wrench: (Display Preferences): (upper right of screen) Use the radio button and select a time period (Viewable Range) which fully encompasses the relevant dates for your project.
  1. Note: For example, if your project active dates extend to December 2022, and you accidentally selected a Custom Period which extends only to, say, September 2022, your total forecasted and actual costs will reflect only until September - - and NOT all the way to December. The Oct through Dec values will be excluded in the total. Be careful!
- x. Fiscal Year Columns: Expand or Collapse columns by hovering over the column header. For Investment Business case, it is recommended that you input values in applicable Fiscal Year (not Quarters or Months).
- xi. Update Financial Planning Detail as needed:
  1. Type: IBC – Benefits
    - a. For each applicable benefit category, for example: [Cost Avoidance / Cost Savings / Increased Efficiency / Increased Revenue / Other Cost Savings] as applicable,
    - b. Enter estimated benefit for each Fiscal Year

	Description	Measures	Line Notes	2022	2023	2024	2025	2026	2027
⋮	▼ Type: IBC - Benefits	USD							
⋮	> Cost Avoidance	USD				321,321			
⋮	> Cost Savings	USD				654,654			
⋮	> Increased Efficiency	USD				7,899			
⋮	> Increased Revenues	USD				1,233,211	1,233,211	1,233,211	1,233,211
⋮	> Other cost savings	USD							

2. Type: Budget Plan - Costs
  - a. General Funds
    - i. Do Not Use GF Current IT Services
    - ii. GF Proposed IT Investments
      1. Major IT Projects (projects >\$1M)
      2. Non-Major IT Projects (projects <\$1M)
    - iii. Enter GF available/planned for each Fiscal Year

	▼ Description	Measures	Line Notes	2022	2023	Total
⋮	▼ >> GF Proposed IT Investments	USD				
⋮	>>> Major IT Projects	USD		444,444.00	333,333.00	777,777.00
⋮	>>> Non-Major IT Projects	USD				
⋮	>>> Agency-Level IT Projects	USD				
⋮	>>> Major Stand Alone IT Procurement...	USD				
⋮	>>> Non-Major Stand Alone IT Procurement...	USD				
⋮	>>> Agency-Level Stand Alone IT Procurement...	USD				
⋮	>>> Procurement Adjustment for State...	USD				

- b. Non General Funds (Note: This does not include Federal Funds)
  - i. Do Not Use NGF Current IT Services
  - ii. NGF Proposed IT Investments
    - 1. Major IT Projects (projects >\$1M)
    - 2. Non-Major IT Projects (projects <\$1M)
  - iii. Enter NGF available/planned for each Fiscal Year

	▼ Description	Measures	Line Notes	2022	2023	Total
⋮	▼ >> NGF Proposed IT Investments	USD				
⋮	>>> Major IT Projects	USD		222,222.00	111,111.00	333,333.00
⋮	>>> Non-Major IT Projects	USD				
⋮	>>> Agency-Level IT Projects	USD				
⋮	>>> Major Stand Alone IT Procurement...	USD				
⋮	>>> Non-Major Stand Alone IT Procurement...	USD				
⋮	>>> Agency-Level Stand Alone IT Procurement...	USD				
⋮	>>> Procurement Adjustment for State...	USD				

- c. Federal Funds
  - i. Enter Federal Funds available/planned for each Fiscal Year
- d. Other
  - i. Enter Other funds available/planned for each Fiscal Year
- 3. Type: Funding Need
  - a. Do not use; your AITR might use this for identifying funding gaps.
  - 4. Note: When you click to another row, the values are saved to the system; there is no 'Save' button, nor is there an "Undo" button.
  - 5. Close the window to return to the previous screen in CTP; your values are saved.
- xii. Note: The values are saved to the system when you click to another row; there is no 'Save' button, nor is there an "Undo" button.

- xiii. Close the window to return to the previous screen in CTP; your values are saved.
  - c. For today's exercise, once all required fields are completed in the IBC Funding screen, Save & Complete.
  - d. This is the last step in today's exercise. The next steps in the Lifecycle belong to the AITR, Agency Head and VITA.
- 13. *AITR: IBC – AITR Approval*
- 14. *AITR: Associate to BReT/BRnT*
- 15. *Agency Head: Agency Head Approval*
- 16. *ITIMD: IBC – ITIMD Assignment*
- 17. *ITIMD: Enter ITIMD Project Evaluation*
- 18. *ITIMD and VITA do subsequent steps.*
  - a. *SCM review and recommendation.*
  - b. *EA review and recommendation.*
  - c. *ECOS review and recommendation.*
  - d. *CSRM review and recommendation.*
- 19. *CIO: IBC Approval.*

## 2. Project Initiation Approval (PIA) Exercise

1. PM: Look in **My Overview** for next step. Click on Lifecycle Step. (**Business Case and Alternatives Analysis (BCAA)**)
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
2. PM: Look in My Overview for next step. Click on Lifecycle Step. (**Business Case and Alternatives Analysis Summary**)
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
3. PM: Look in My Overview for next step. Click on Lifecycle Step. (**Project Charter**)
  - a. Fill out required fields.
  - b. Note that the "**Business Objectives**" section requires you to choose from a pre-defined list. Click "**Maintain Selections**" button; use **Data Picker** to select one or more Service Area for your project. Click OK to exit the Data Picker.
  - c. Note for the **Resources and Cost** section:
  - d. Click on the button to open the Financial Planning Detail window
    - i. Version: Actual/Forecast (forecast)
    - ii. Focus Control: click and drag "Account" to the left of the "||" bar if needed.
    - iii. Update Financial Planning Detail as follows:
    - iv. Type: Budget Plan - Costs
      1. For each of the 12 budget categories, [Internal Staff Labor / Services / Software Tools / Hardware / Maintenance / Facilities / Telecommunications / Training / IV&V / Contingency (Risk) / Pre-Project Initiation / Other Costs] as applicable,
        - a. Enter budgeted cost for each Fiscal Year
    - v. Type: O&M (Operations and Maintenance)
      1. For each of the 4 funding sources, [General Fund / Non General Fund / Federal Fund / Other] as applicable,
        - a. Enter budgeted O&M cost for six Fiscal Years, beginning with the year when the new product or service will be implemented.
    - vi. Type: Labor
      1. This is currently not used.
    - vii. Project funding available/planned (GF, NGF)
      1. This should match the project figure (i.e., \$1M project costs = \$1M from various funding sources); update the project funding if needed. (See instructions from the IBC exercise above.)
  - e. Back in the Project Charter screen: Save & Complete.

- f. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
4. PM: Look in My Overview for next step. Click on Lifecycle Step. (Project Initiation Risk Assessment).
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
5. PM: Look in My Overview for next step. Click on Lifecycle Step. (Project Initiation Complexity Assessment).
  - a. Fill out required fields.
  - b. Save & Complete.
  - c. The system will present you with the next step in the Lifecycle, since you (as the PM) are the Responsible Person to perform the step.
6. PM: Look in My Overview for next step. Click on Lifecycle Step. (Project Initiation R/C Summary).
  - a. Review, Save & Complete.
  - b. This is the last step in today's exercise. The next steps in the Lifecycle belong to the Project Sponsor, Agency Head and VITA.
7. *Project Sponsor: Charter approval.*
8. *Agency Head: Charter approval.*
9. *PMD: PIA Consultant Review*
10. *CIO: Project Initiation Approval (PIA).*