Commonwealth of Virginia

Agency Head Training for Primavera Portfolios

Version 1, Primavera Portfolios 7.5 SP2

Executive Summary

This document will walk the Agency Head through the various processes he or she will make use of as part of their daily business operations. The intent is to show the user how the documented processes and various Forms and Scorecards interact to facilitate the operations of both your Agency and the Project Management Division (PMD) operations, supporting the Portfolio Management Code of Virginia legislation. This document consists of textual information and figures, working together to show the user the location, context, or placement of the various buttons, dropdowns, and links that are the focus of our attention. For complete process detail, see AITR training.

Process 1.1 Agency Head:

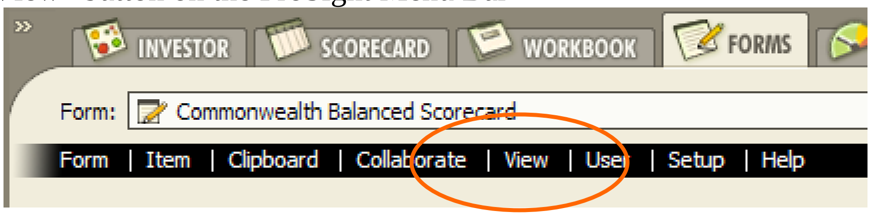
Complete the following steps to create a new project:

Step 1: Access

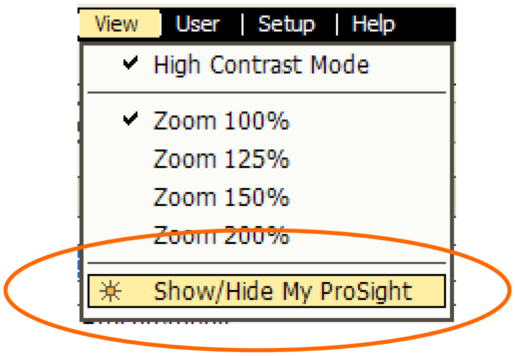
Instructions to Access a Project Business Alignment Form

Access :

- Click on "View" button on the ProSight Menu Bar

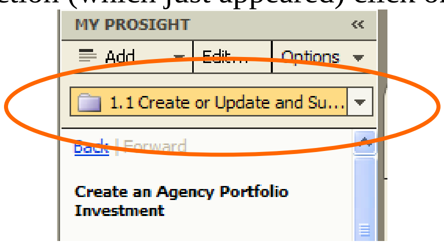


- Click on "Show/Hide " from the Menu List "" will be displayed on the left-hand side of the Screen

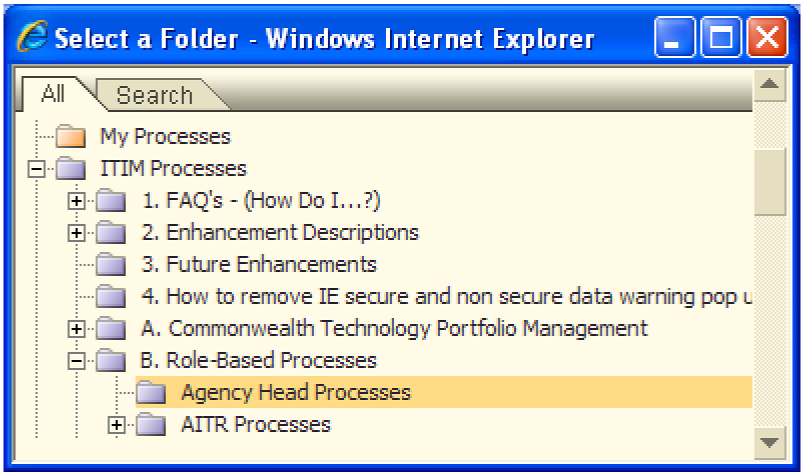


Access Project Business Alignment Form:

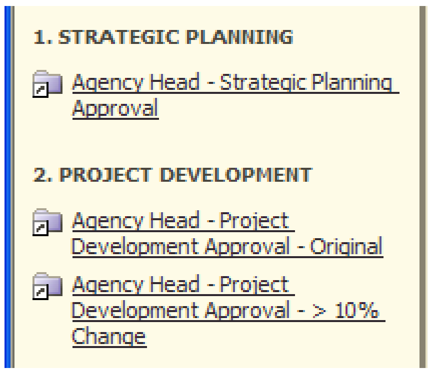
- In My Portfolios Section (which just appeared) click on the drop- box option



- From the drop-box select the following:
- Navigate to the following and select the highlighted option



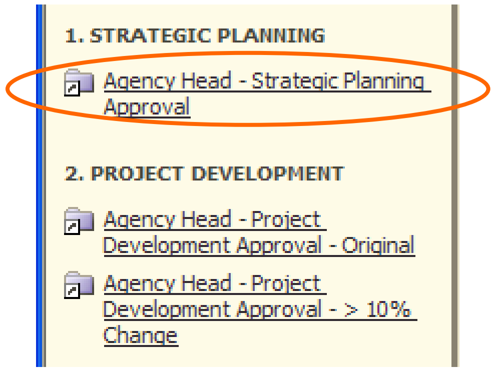
- You are now looking at the top level location for all the Agency Head processes.

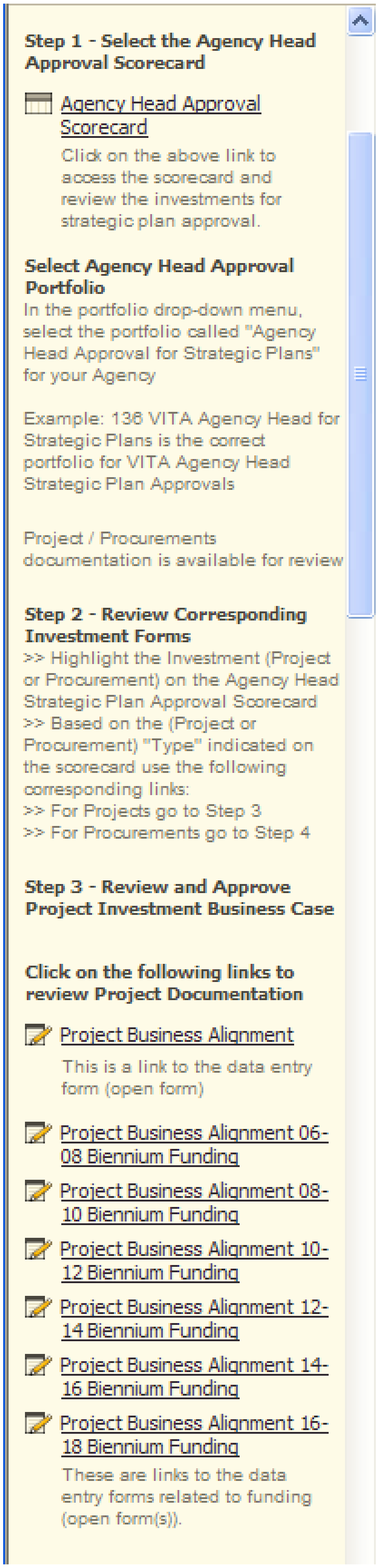


Strategic Planning

Process 1: Strategic Planning Approval

Select the option as shown below.





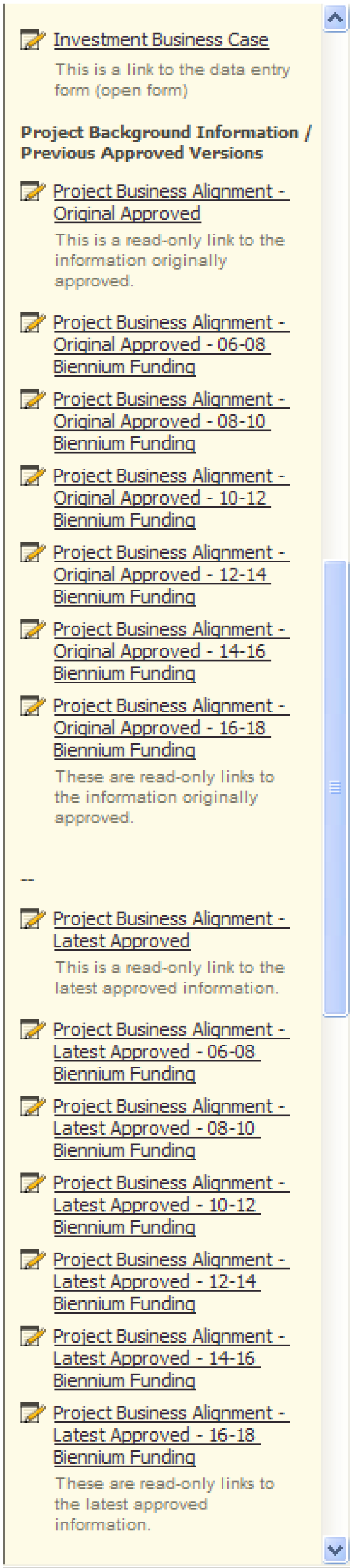
Step 1: Select the Agency Head Development Approval Scorecard

Step 2: Select Agency Head Approval Portfolio

Select your agency, then right click on the project of your choice to select it.

Step 3: Review the Investment

Use the links provided to review the selected investment.



Step 3 cont: Review the Investment

Use the links provided to review the selected project.

Step 3 cont: Review the Investment

Use the links provided to review the selected investment.

Step 4: Review and Approve Procurement

Use the links provided to review the selected procurement.

Process: Certify Major Projects

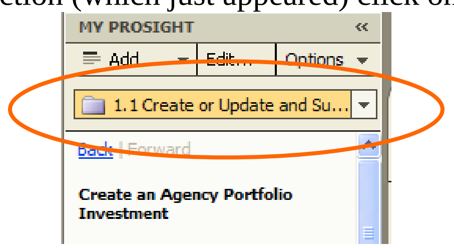
Agency Head (or their designated representative) MUST Certify Major Projects.
Each year Agency Heads or their designated representative MUST certify Major IT Project Information for their Agency within the Commonwealth Technology Portfolio. The Certification is done at the portfolio level.
As AITR, review the list of major projects and inform the Agency Head (or designee) to proceed with the certification.

Agency Head (or their designated representative) MUST Certify Strategic Plan Information

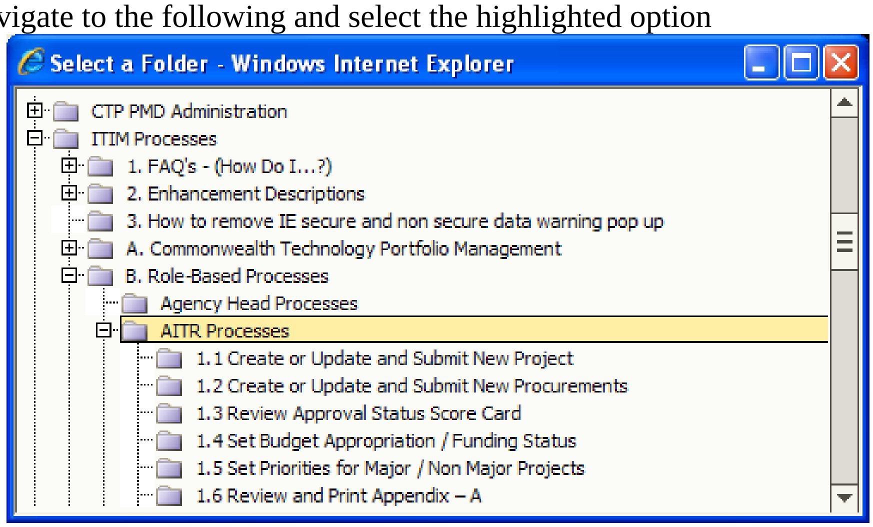
Each year Agency Heads or their designated representative MUST certify IT Strategic Planning Information for their Agency within the Commonwealth Technology Portfolio. The Certification is done at the portfolio level.

Select the AITR Processes:

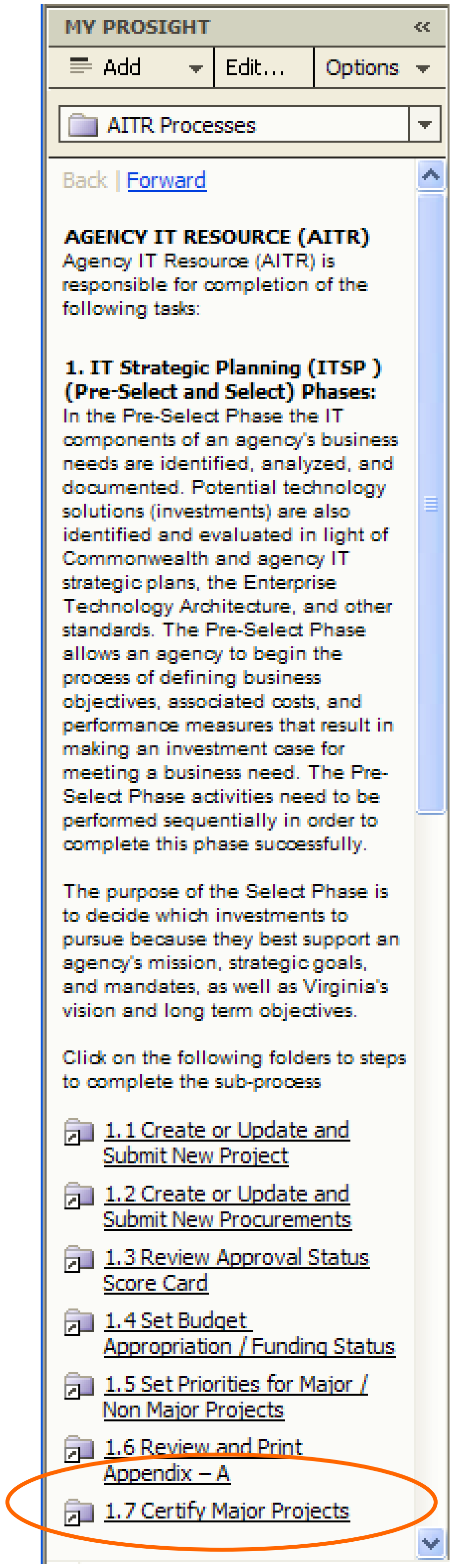
- In My Portfolios Section (which just appeared) click on the drop- box option



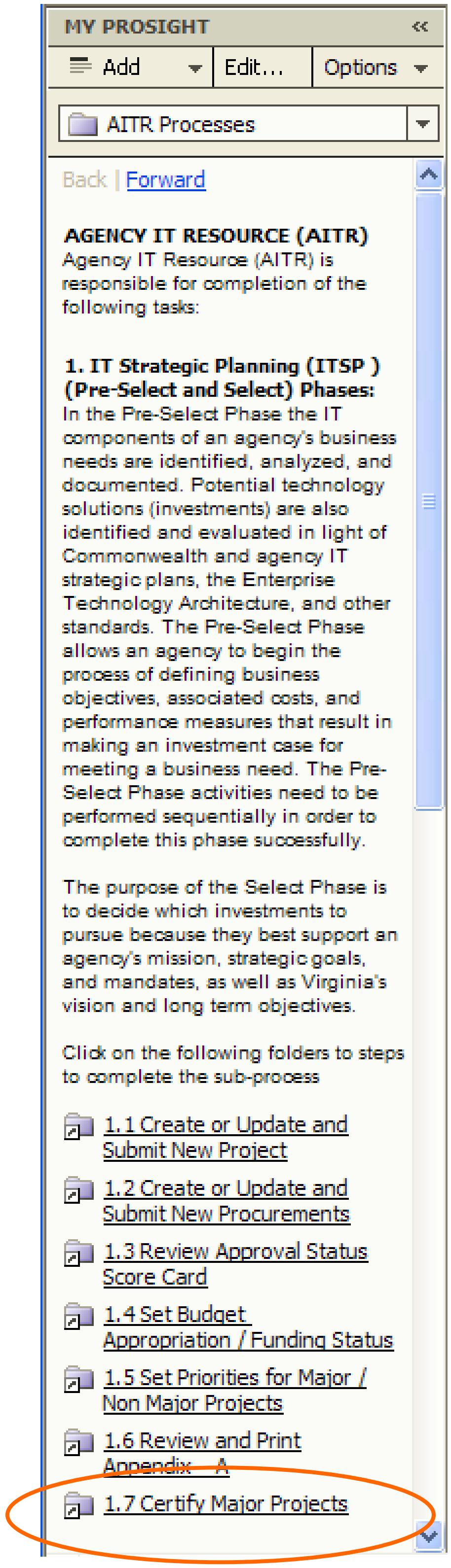
- From the drop-box select the following:
- Navigate to the following and select the highlighted option



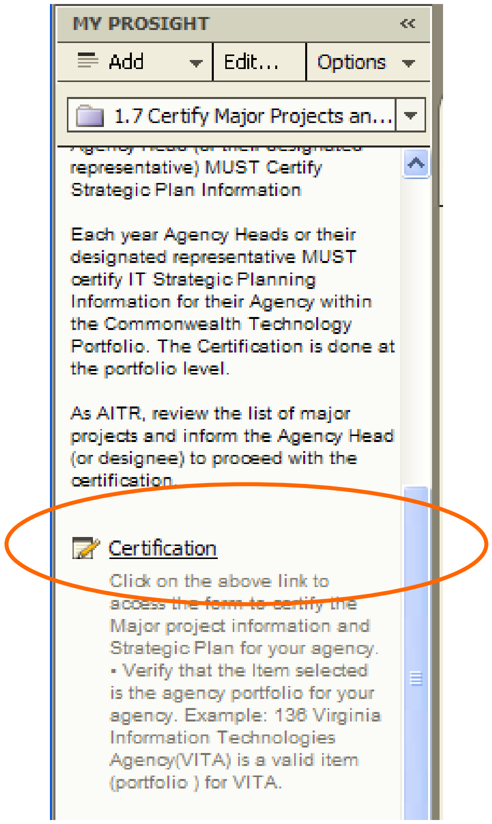
- You are now looking at the parent location for all the AITR related processes. Scroll down and select the option as shown in the figure below.



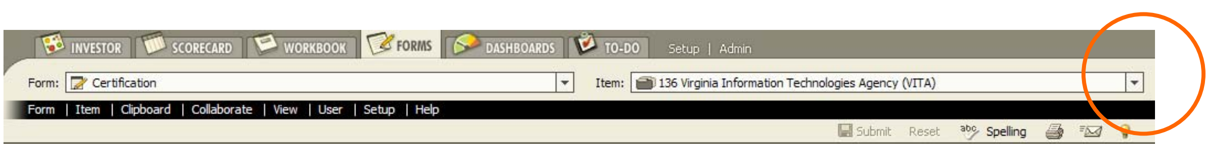
- You are now looking at the parent location for all the AITR related processes. Scroll down and select the option as shown in the figure below.


MY PROSIGHT
Add
Edit...
Options
AITR Processes
Back | Forward
AGENCY IT RESOURCE (AITR)
Agency IT Resource (AITR) is responsible for completion of the following tasks:
1. IT Strategic Planning (ITSP) (Pre-Select and Select) Phases:
In the Pre-Select Phase the IT components of an agency's business needs are identified, analyzed, and documented. Potential technology solutions (investments) are also identified and evaluated in light of Commonwealth and agency IT strategic plans, the Enterprise Technology Architecture, and other standards. The Pre-Select Phase allows an agency to begin the process of defining business objectives, associated costs, and performance measures that result in making an investment case for meeting a business need. The Pre-Select Phase activities need to be performed sequentially in order to complete this phase successfully.
The purpose of the Select Phase is to decide which investments to pursue because they best support an agency's mission, strategic goals, and mandates, as well as Virginia's vision and long term objectives.
Click on the following folders to steps to complete the sub-process
1.1 Create or Update and Submit New Project
1.2 Create or Update and Submit New Procurements
1.3 Review Approval Status Score Card
1.4 Set Budget Appropriation / Funding Status
1.5 Set Priorities for Major / Non Major Projects
1.6 Review and Print Appendix - A
1.7 Certify Major Projects

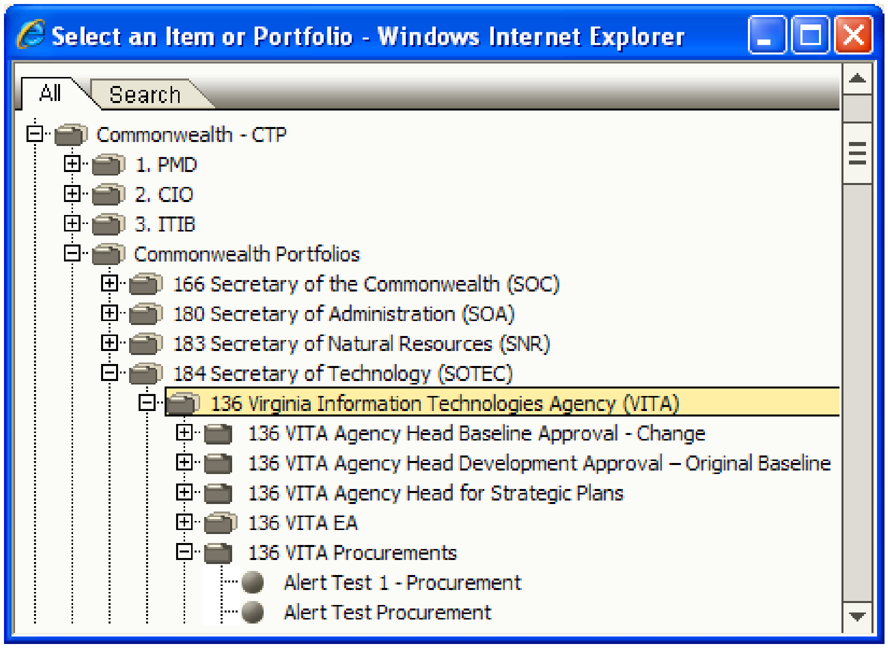
As AITR, review the list of major projects and inform the Agency Head (or designee) to proceed with the certification. The link, as shown in the figure below, will take you directly to the Certification form.



The user will need to select the correct Portfolio as the Certification is done at the portfolio level. Use the related to the Item to select the correct Portfolio.



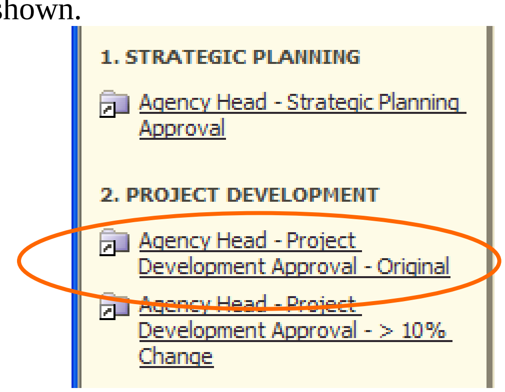
The figure below represents an example of the type of selection you will make.

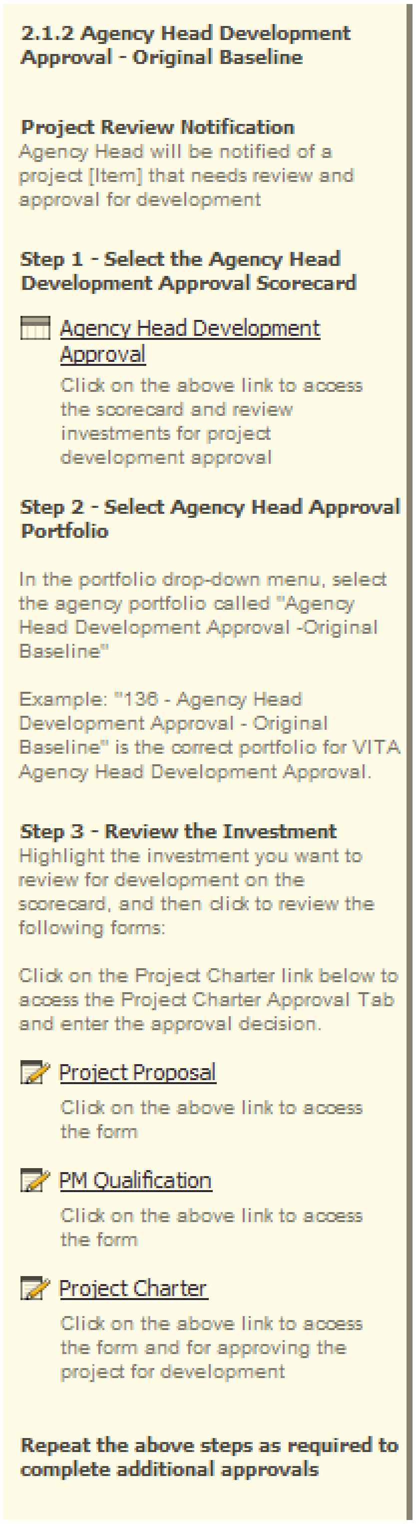

Select an Item or Portfolio - Windows Internet Explorer
All
Search
Commonwealth - CTP
1. PMD
2. CIO
3. ITIB
Commonwealth Portfolios
166 Secretary of the Commonwealth (SOC)
180 Secretary of Administration (SOA)
183 Secretary of Natural Resources (SNR)
184 Secretary of Technology (SOTEC)
136 Virginia Information Technologies Agency (VITA)
136 VITA Agency Head Baseline Approval - Change
136 VITA Agency Head Development Approval – Original Baseline
136 VITA Agency Head for Strategic Plans
136 VITA EA
136 VITA Procurements
Alert Test 1 - Procurement
Alert Test Procurement

Project Development

Process 2: Development Approval

Select the options shown.





Step 1: Select the Agency Head Development Approval Scorecard

Step 2: Select Agency Head Approval Portfolio

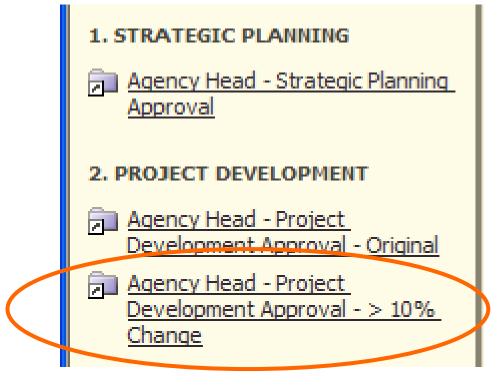
Select your agency, then right click on the project of your choice to select it.

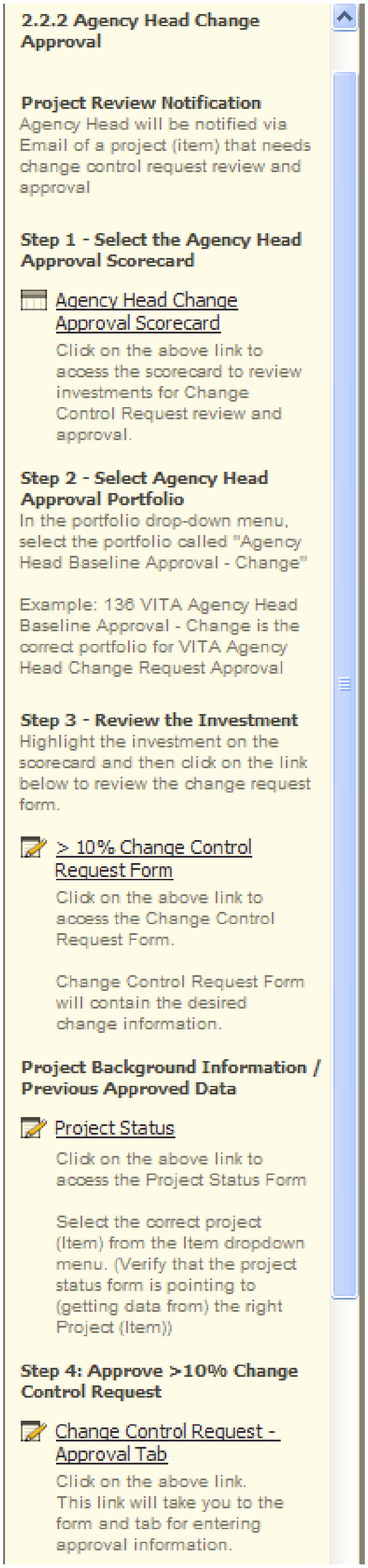
Step 3: Review the Investment

Use the links provided to review the selected investment.

Process 3: Change Approval

Select the options shown.





Step 1: Select the Agency Head Approval Scorecard

Step 2: Select Agency Head Approval Portfolio

Select your agency, then right click on the project of your choice to select it.

Step 3: Review the Investment

Use the links provided to review the selected investment.

Step 4: Approve > 10% change control request

Use the link provided to open the Change Control Request > 10% form.