

# **Commonwealth of Virginia**

## **Agency Head Training for Primavera Portfolios**

**Version 1, Primavera Portfolios 7.5 SP2**

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## **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:

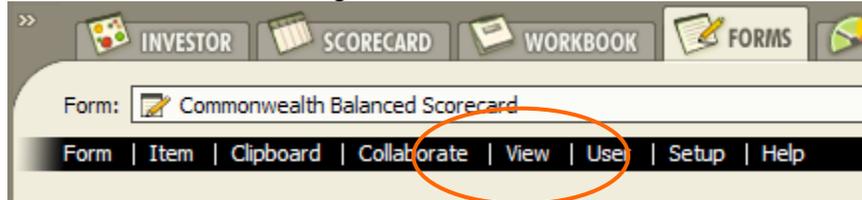
Complete the following steps to create a new project:

#### Step 1: Access

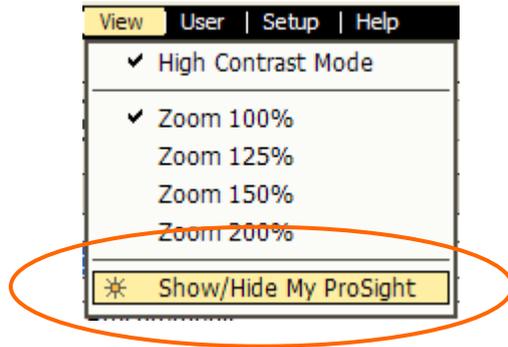
Instructions to Access a Project Business Alignment Form

**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



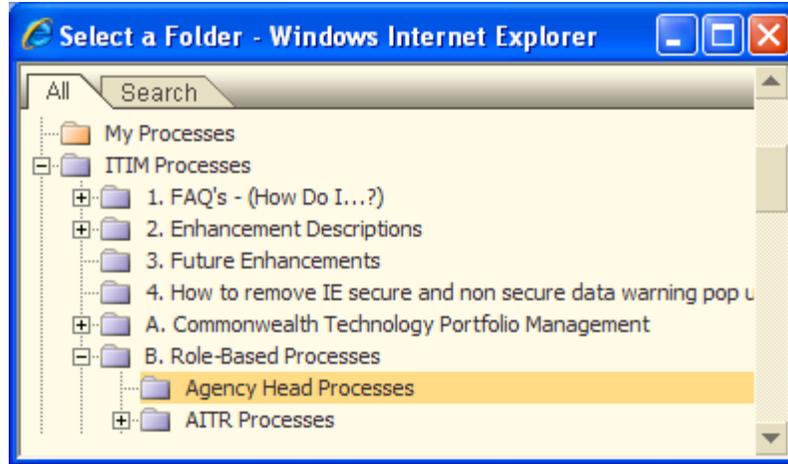
**Access Project Business Alignment Form:**

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

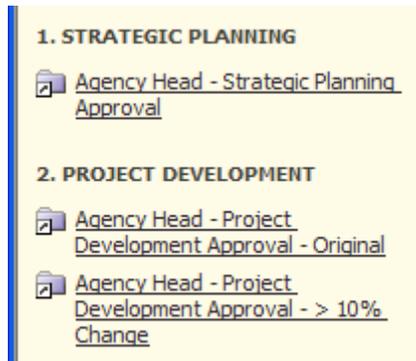


- From the drop-box select the following:
- Navigate to the following and select the highlighted option

## AITR Training – My Processes



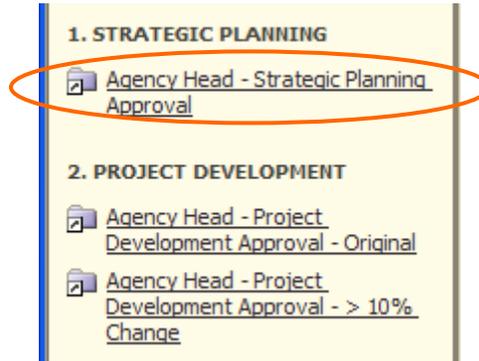
- You are now looking at the top level location for all the Agency Head processes.



## Strategic Planning

### ***Process 1: Strategic Planning Approval***

Select the option as shown below.



**Step 1 - Select the Agency Head Approval Scorecard**

 [Agency Head Approval Scorecard](#)

Click on the above link to access the scorecard and review the investments for strategic plan approval.

**Select Agency Head Approval Portfolio**

In the portfolio drop-down menu, select the portfolio called "Agency Head Approval for Strategic Plans" for your Agency

Example: 136 VITA Agency Head for Strategic Plans is the correct portfolio for VITA Agency Head Strategic Plan Approvals

Project / Procurements documentation is available for review

**Step 2 - Review Corresponding Investment Forms**

>> Highlight the Investment (Project or Procurement) on the Agency Head Strategic Plan Approval Scorecard  
>> Based on the (Project or Procurement) "Type" indicated on the scorecard use the following corresponding links:  
>> For Projects go to Step 3  
>> For Procurements go to Step 4

**Step 3 - Review and Approve Project Investment Business Case**

**Click on the following links to review Project Documentation**

 [Project Business Alignment](#)

This is a link to the data entry form (open form)

 [Project Business Alignment 06-08 Biennium Funding](#)

 [Project Business Alignment 08-10 Biennium Funding](#)

 [Project Business Alignment 10-12 Biennium Funding](#)

 [Project Business Alignment 12-14 Biennium Funding](#)

 [Project Business Alignment 14-16 Biennium Funding](#)

 [Project Business Alignment 16-18 Biennium Funding](#)

These are links to the data entry forms related to funding (open form(s)).

## 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.

[Investment Business Case](#)  
This is a link to the data entry form (open form)

**Project Background Information / Previous Approved Versions**

[Project Business Alignment - Original Approved](#)  
This is a read-only link to the information originally approved.

[Project Business Alignment - Original Approved - 06-08 Biennium Funding](#)

[Project Business Alignment - Original Approved - 08-10 Biennium Funding](#)

[Project Business Alignment - Original Approved - 10-12 Biennium Funding](#)

[Project Business Alignment - Original Approved - 12-14 Biennium Funding](#)

[Project Business Alignment - Original Approved - 14-16 Biennium Funding](#)

[Project Business Alignment - Original Approved - 16-18 Biennium Funding](#)  
These are read-only links to the information originally approved.

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[Project Business Alignment - Latest Approved](#)  
This is a read-only link to the latest approved information.

[Project Business Alignment - Latest Approved - 06-08 Biennium Funding](#)

[Project Business Alignment - Latest Approved - 08-10 Biennium Funding](#)

[Project Business Alignment - Latest Approved - 10-12 Biennium Funding](#)

[Project Business Alignment - Latest Approved - 12-14 Biennium Funding](#)

[Project Business Alignment - Latest Approved - 14-16 Biennium Funding](#)

[Project Business Alignment - Latest Approved - 16-18 Biennium Funding](#)  
These are read-only links to the latest approved information.

### Step 3 cont: Review the Investment

Use the links provided to review the selected project.

 [Investment Business Case - Original Approved](#)  
This is a read-only link to the information originally approved.

 [Investment Business Case - Latest Approved](#)  
This is a read-only link to the latest approved information.

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**Approve Project Investment Business Case**

 [Approval - Project Investment Business Case](#)  
This link will take you to the form and tab for entering approval information.

Complete the Agency Head Approval fields and then click on the "Submit" button

**PROCUREMENT APPROVALS**

**Step 4 - Review and Approve Procurement Business Alignment and/or Procurement Initiation (APR)**

Click on the following links to review Procurements

 [Procurement Business Alignment and Initiation \(APR\)](#)  
This is a link to the data entry form (open form)

**Procurement Background Information / Previous Approved Versions**

 [Procurement Business Alignment and Initiation \(APR\) - Original Approved](#)  
This is a read-only link to the information originally approved.

 [Procurement Business Alignment and Initiation \(APR\) - Latest Approved](#)  
This is a read-only link to the latest approved information.

**Approve Procurement Business Alignment and/or Initiation (APR)**

 [Approval - Procurement Business Alignment and Initiation \(APR\)](#)  
Click on the above link to access the Form and Form-tab for entering approval information.

### 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

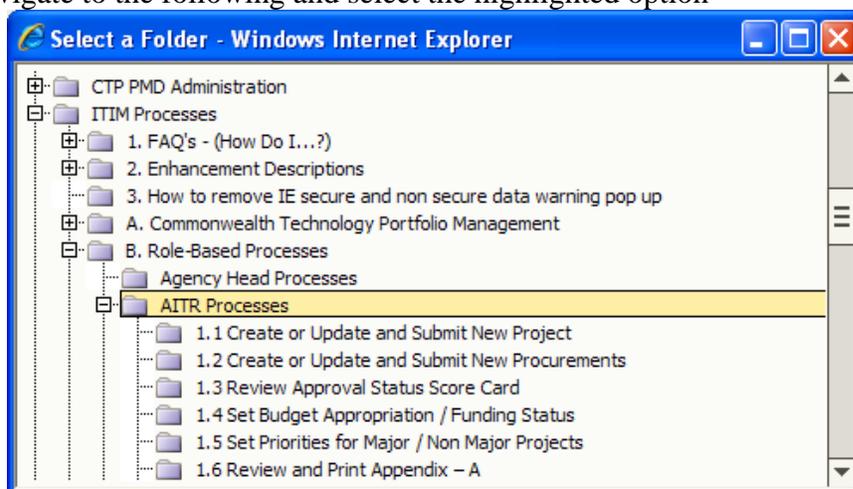
Each year Agency Heads or their designated representative **MUST** certify IT Strategic Planning Information for their Agency within the Commonwealth Technology Portfolio. The Certification is done at the portfolio level.

#### **Select the AITR Processes:**

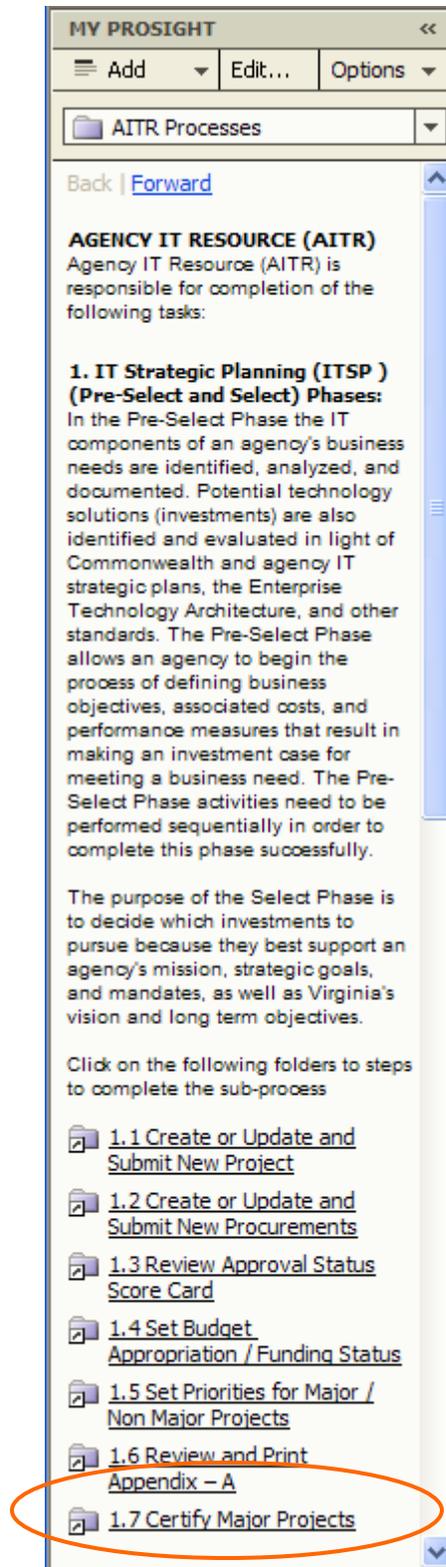
- In My Portfolios Section (which just appeared) click on the drop- box option



- 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.

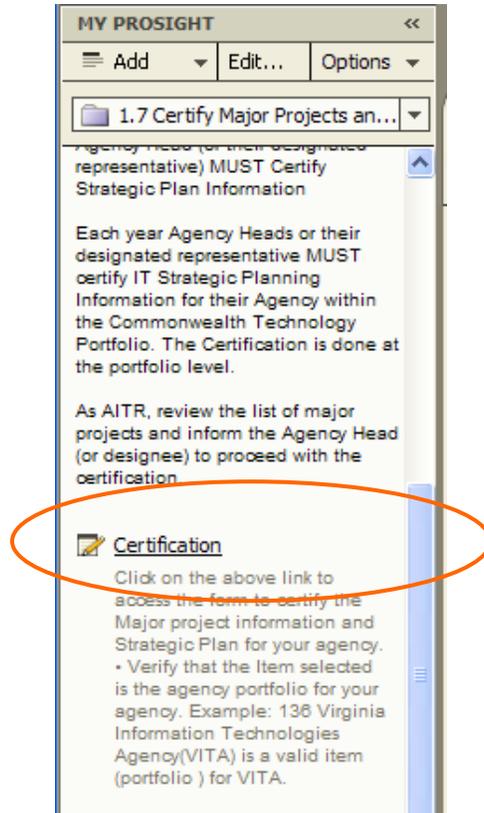
The purpose of the Select Phase is to decide which investments to pursue because they best support an agency's mission, strategic goals, and mandates, as well as Virginia's vision and long term objectives.

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](#)

## AITR Training – My Processes

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.

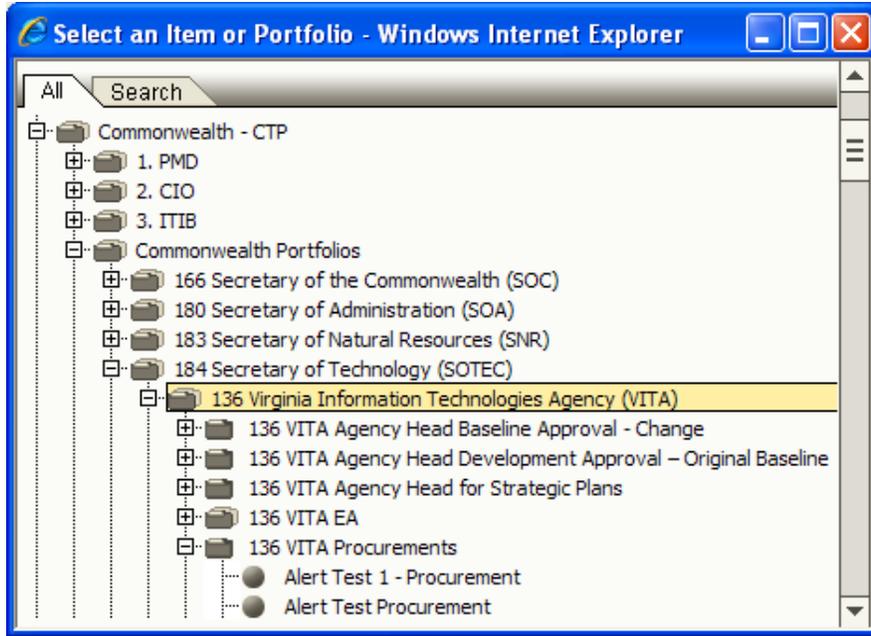


The user will need to select the correct Portfolio as the Certification is done at the portfolio level. Use the  related to the Item to select the correct Portfolio.



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

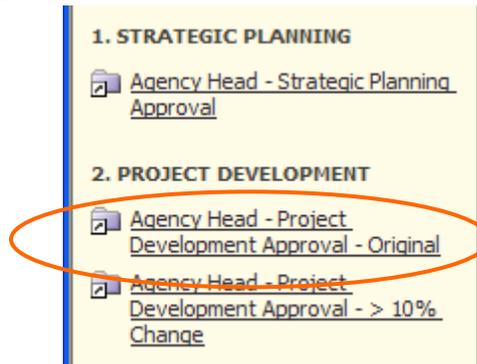
AITR Training – My Processes



## Project Development

### ***Process 2: Development Approval***

Select the options shown.



### 2.1.2 Agency Head Development Approval - Original Baseline

#### Project Review Notification

Agency Head will be notified of a project [Item] that needs review and approval for development

#### Step 1 - Select the Agency Head Development Approval Scorecard

##### [Agency Head Development Approval](#)

Click on the above link to access the scorecard and review investments for project development approval

#### Step 2 - Select Agency Head Approval Portfolio

In the portfolio drop-down menu, select the agency portfolio called "Agency Head Development Approval -Original Baseline"

Example: "138 - Agency Head Development Approval - Original Baseline" is the correct portfolio for VITA Agency Head Development Approval.

#### Step 3 - Review the Investment

Highlight the investment you want to review for development on the scorecard, and then click to review the following forms:

Click on the Project Charter link below to access the Project Charter Approval Tab and enter the approval decision.

##### [Project Proposal](#)

Click on the above link to access the form

##### [PM Qualification](#)

Click on the above link to access the form

##### [Project Charter](#)

Click on the above link to access the form and for approving the project for development

**Repeat the above steps as required to complete additional approvals**

## Step 1: Select the Agency Head Development Approval Scorecard

## Step 2: Select Agency Head Approval Portfolio

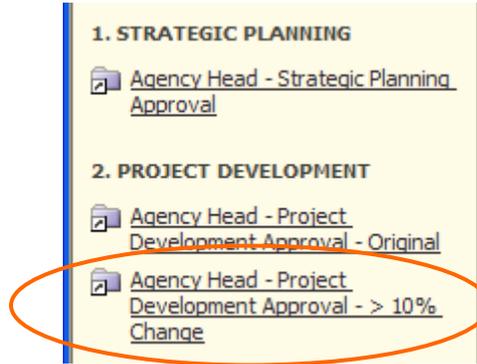
Select your agency, then right click on the project of your choice to select it.

## Step 3: Review the Investment

Use the links provided to review the selected investment.

### ***Process 3: Change Approval***

Select the options shown.



**2.2.2 Agency Head Change Approval**

**Project Review Notification**  
Agency Head will be notified via Email of a project (item) that needs change control request review and approval

**Step 1 - Select the Agency Head Approval Scorecard**

 [Agency Head Change Approval Scorecard](#)  
Click on the above link to access the scorecard to review investments for Change Control Request review and approval.

**Step 2 - Select Agency Head Approval Portfolio**  
In the portfolio drop-down menu, select the portfolio called "Agency Head Baseline Approval - Change"  
  
Example: 136 VITA Agency Head Baseline Approval - Change is the correct portfolio for VITA Agency Head Change Request Approval

**Step 3 - Review the Investment**  
Highlight the investment on the scorecard and then click on the link below to review the change request form.

 [> 10% Change Control Request Form](#)  
Click on the above link to access the Change Control Request Form.  
  
Change Control Request Form will contain the desired change information.

**Project Background Information / Previous Approved Data**

 [Project Status](#)  
Click on the above link to access the Project Status Form  
  
Select the correct project (Item) from the Item dropdown menu. (Verify that the project status form is pointing to (getting data from) the right Project (Item))

**Step 4: Approve >10% Change Control Request**

 [Change Control Request - Approval Tab](#)  
Click on the above link. This link will take you to the form and tab for entering approval information.

**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.

## AITR Training – My Processes