VIRGINIA
IT AGENCY

Commonwealth Technology Portfolio (CTP)

CTP Training for IT Project Managers

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VITA Project Management Division

Version 9.0

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

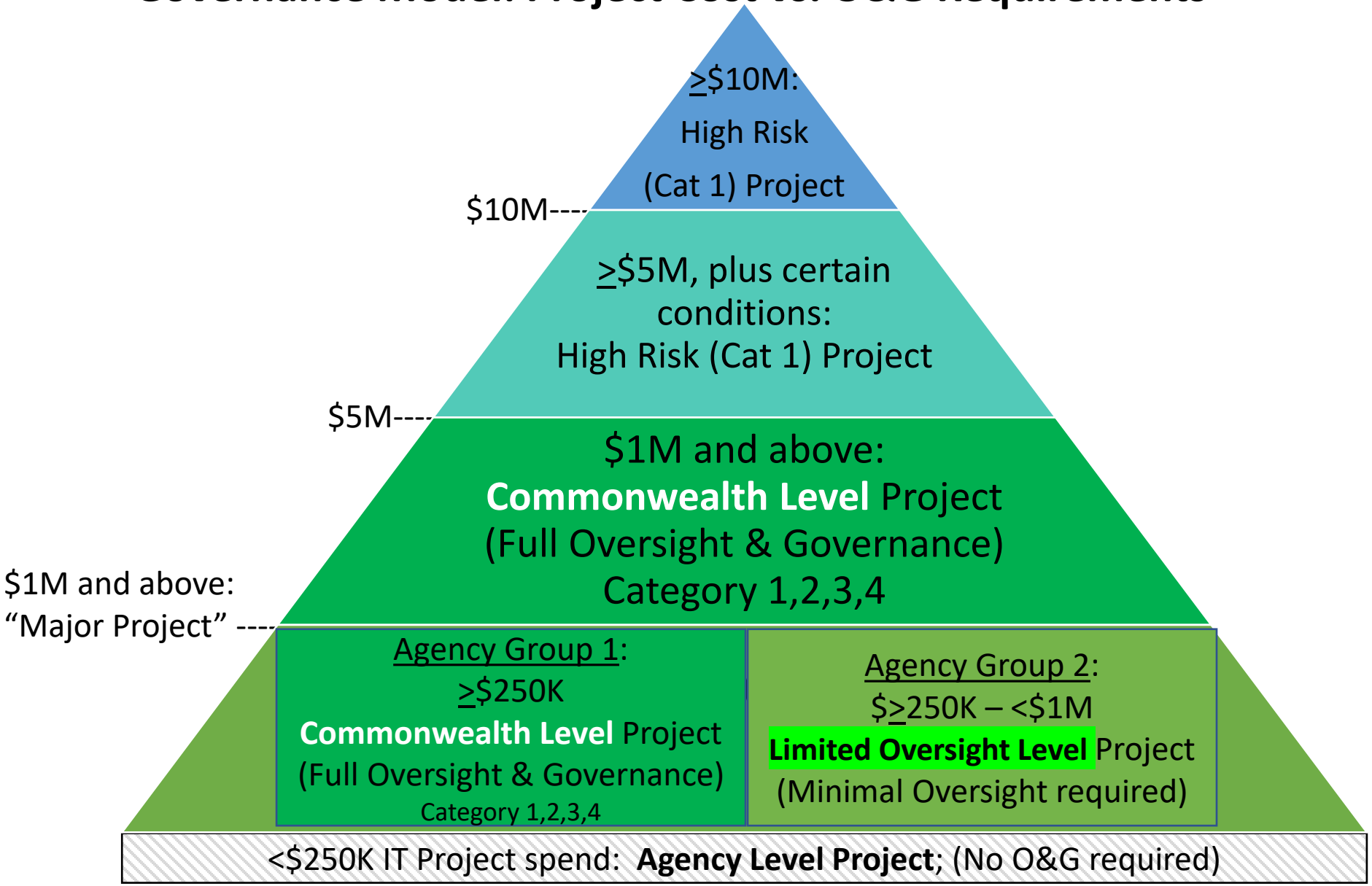
CTP E1 Orientation

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)

Governance Model: Project Cost vs. O&G Requirements



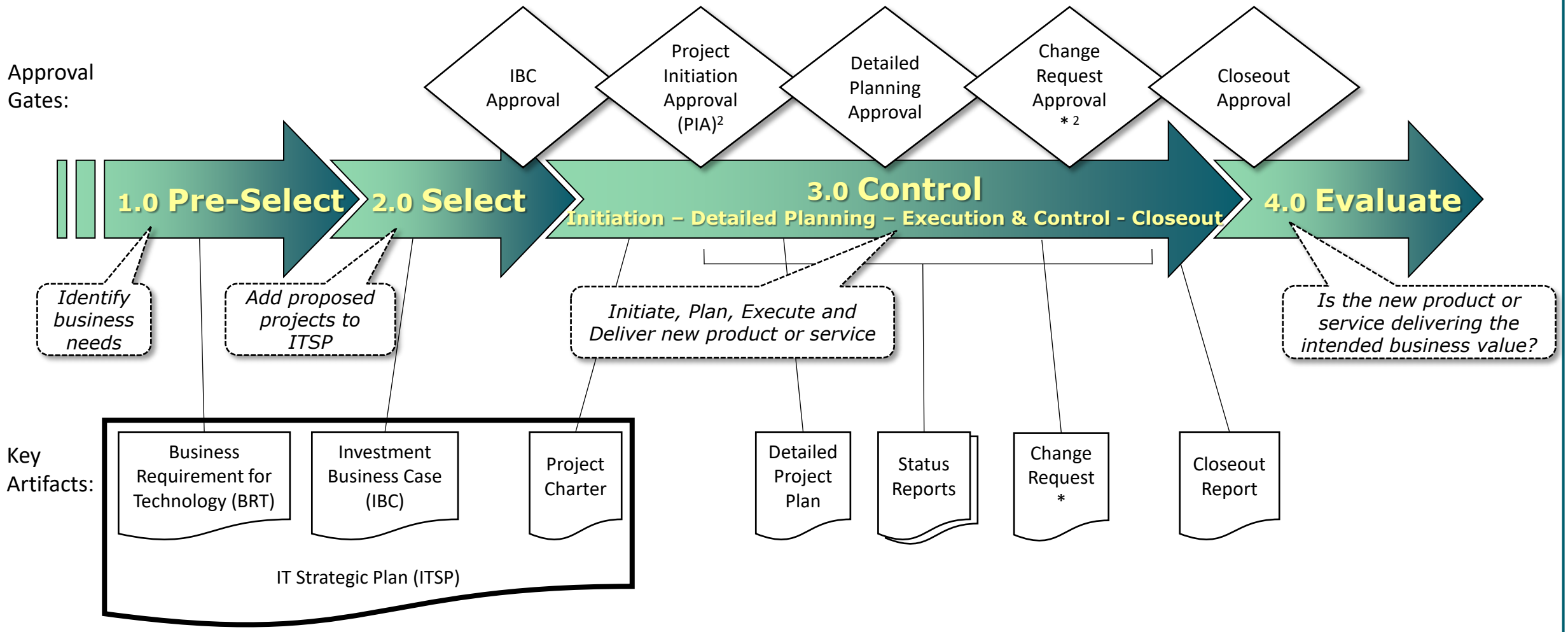
Governance Model: Agency Group

Agency Group
Agency Group 1:
• IT Projects ≥ $250K: **Commonwealth Level** Project: (**Full** Oversight & Governance)
• IT Projects < $250K: **Agency Level** Project: (**No** Oversight & Governance)
Agency Group 2:
• IT Projects ≥ $1M: **Commonwealth Level** Project: (**Full** Oversight & Governance)
• IT Projects ≥ $250K < $1M: **Limited Oversight Level** Project: (**Limited** Oversight & Governance)
• IT Projects < $250K: **Agency Level** Project: (**No** Oversight & Governance)

Project Categories: 1 – 4

Commonwealth Level Project Categories 1-4				
		Complexity:		
		High	Med	Low
Risk:	**High**	**1**	**1**	**1**
	Med	2	2	3
	Low	3	4	4
Limited Oversight & Agency Level Project:		n/a	n/a	n/a

IT Project Lifecycle: Key Approval Gates and Documentation

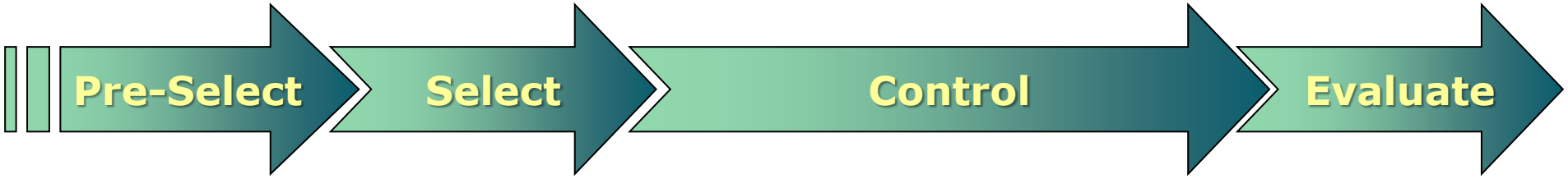


[2] Category 1-2 projects: SOC approval required

* Change Request if needed

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

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

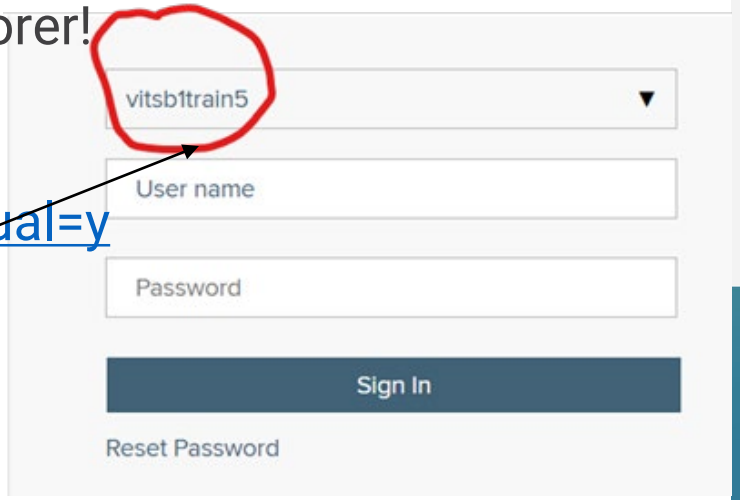
CTP E1 Basic Navigation – cont'd

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

Log into the Training Environment

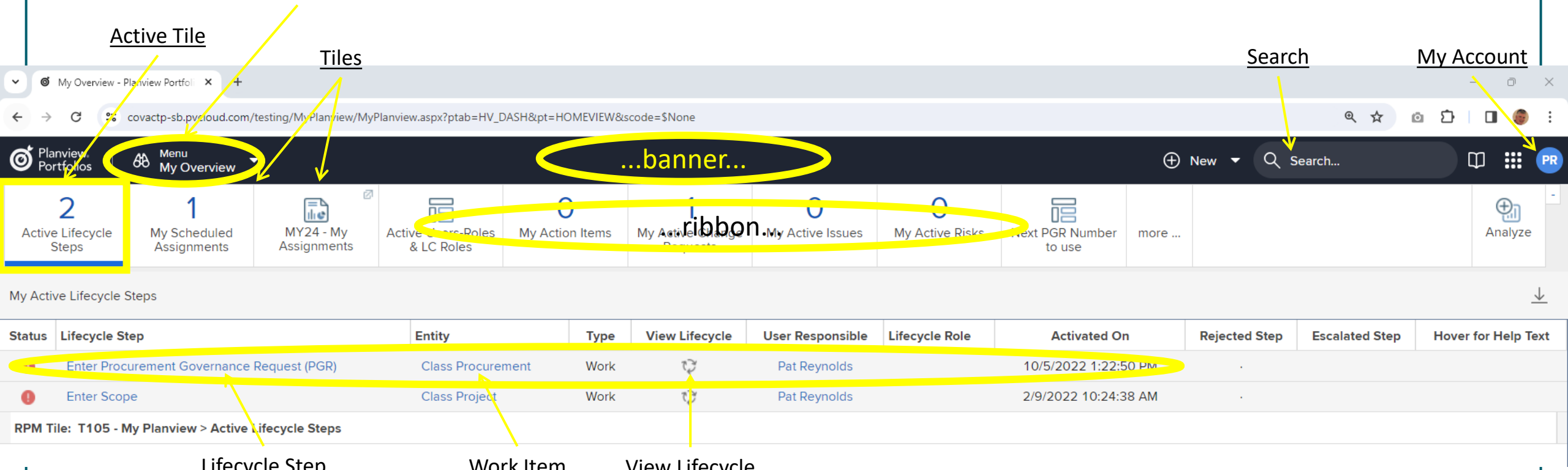
1. Open browser: Use Chrome or Edge only - - NOT Internet Explorer!
    1. (VPN not recommended.)
2. https://covactp-sb.pvcloud.com/testing/login/body.asp?manual=y
3. Environment: VITSB1TRAIN**5** (aka "TRAIN5")
4. User name: Student01, Student02, Student03, ….etc.
5. Password: train01 train02 train03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

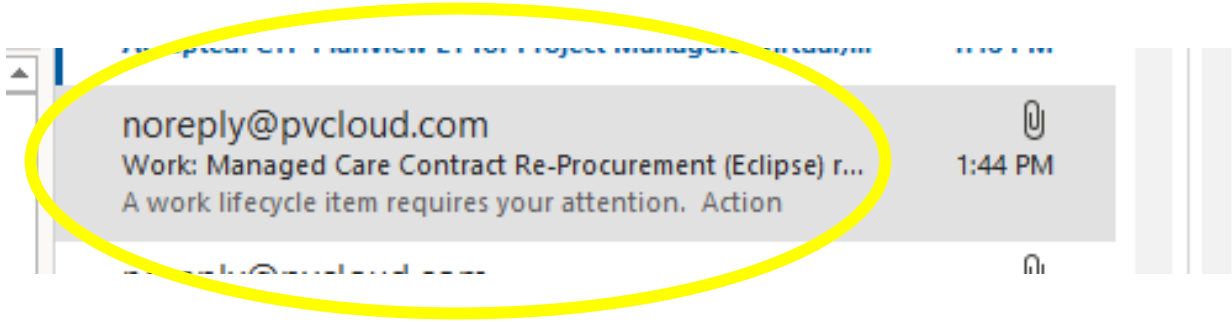


CTP E1 Navigation: Banner / My Overview

- 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

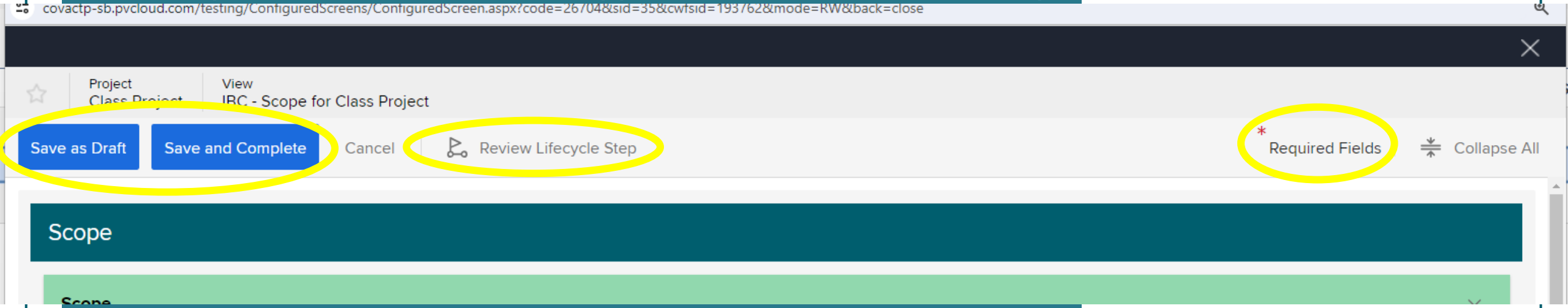
Other actions
Work details: Managed Care Contract Re-Procurement (Eclipse)
Lifecycle diagram: Managed Care Contract Re-Procurement (Eclipse)

Planview Portfolios

Customer Success Center | Email Settings

Email Notification: Lifecycle Item

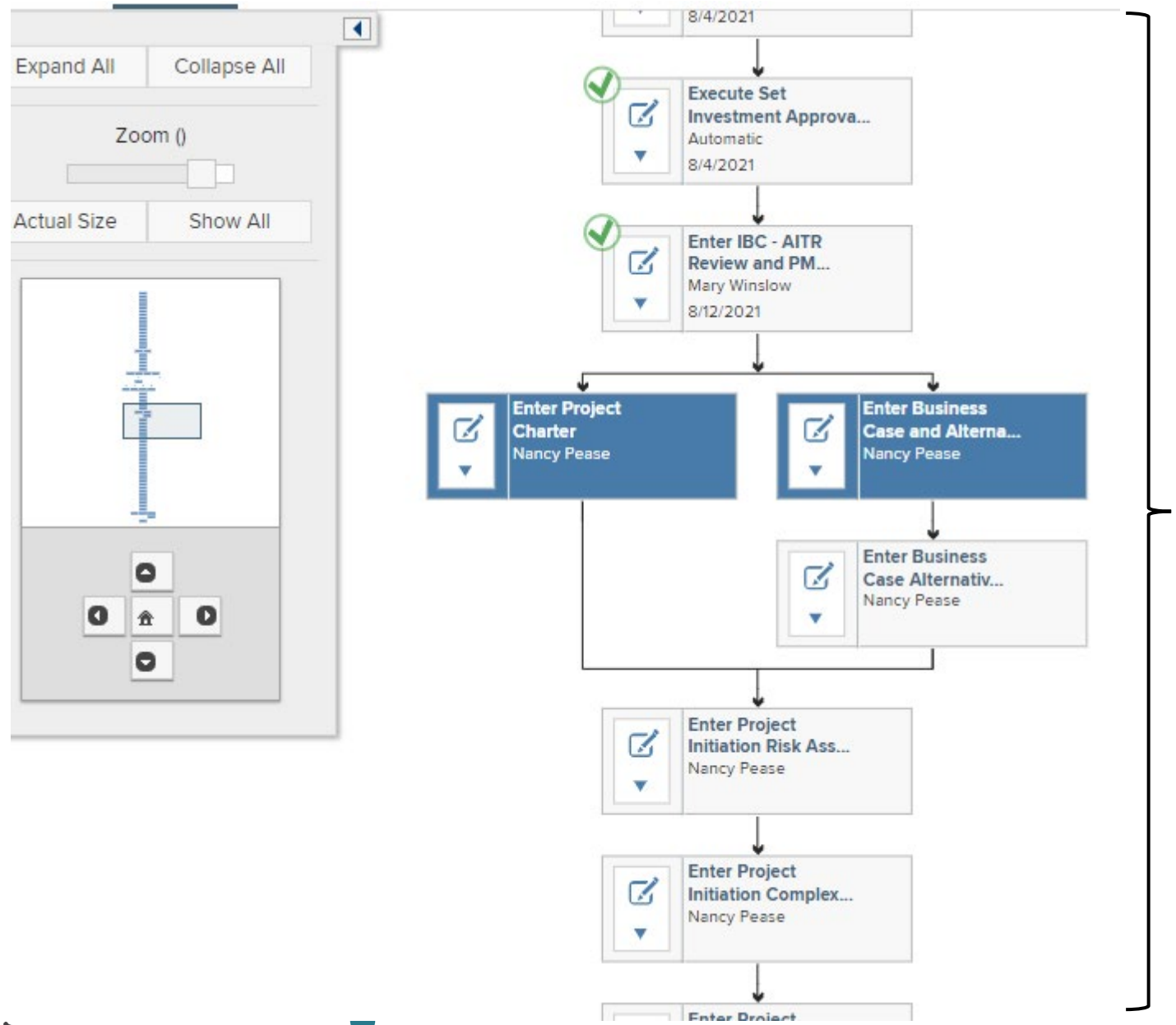
- Review Item
- Complete the action, such as: Approval checkbox + date stamp



- "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"

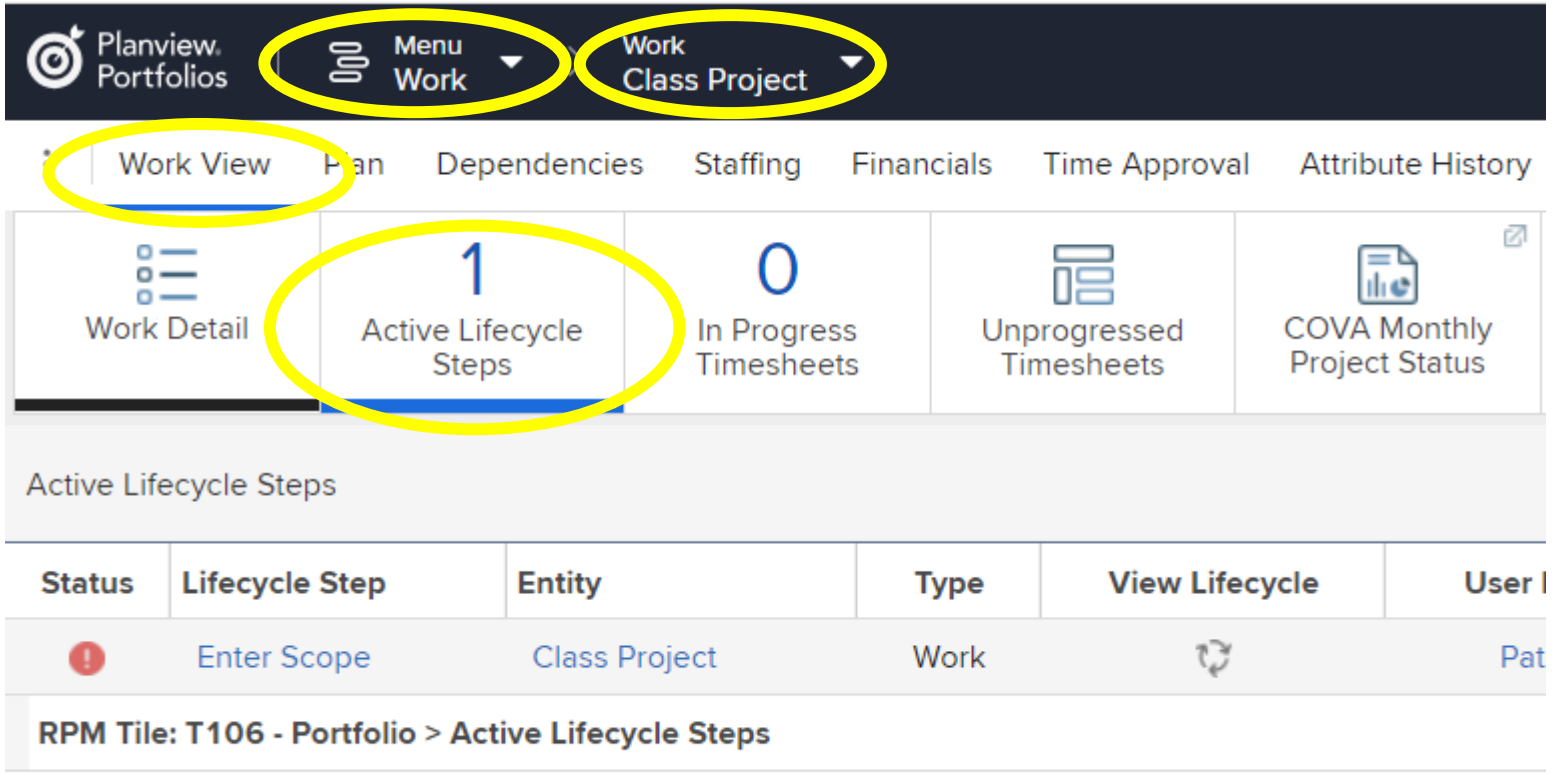
- Individuals (roles) will receive email notification when they need to complete an Active Lifecycle Step.
- Upon completion of the Active Lifecycle Step, the next task in sequence will become Active, and the User Responsible will receive email notification.



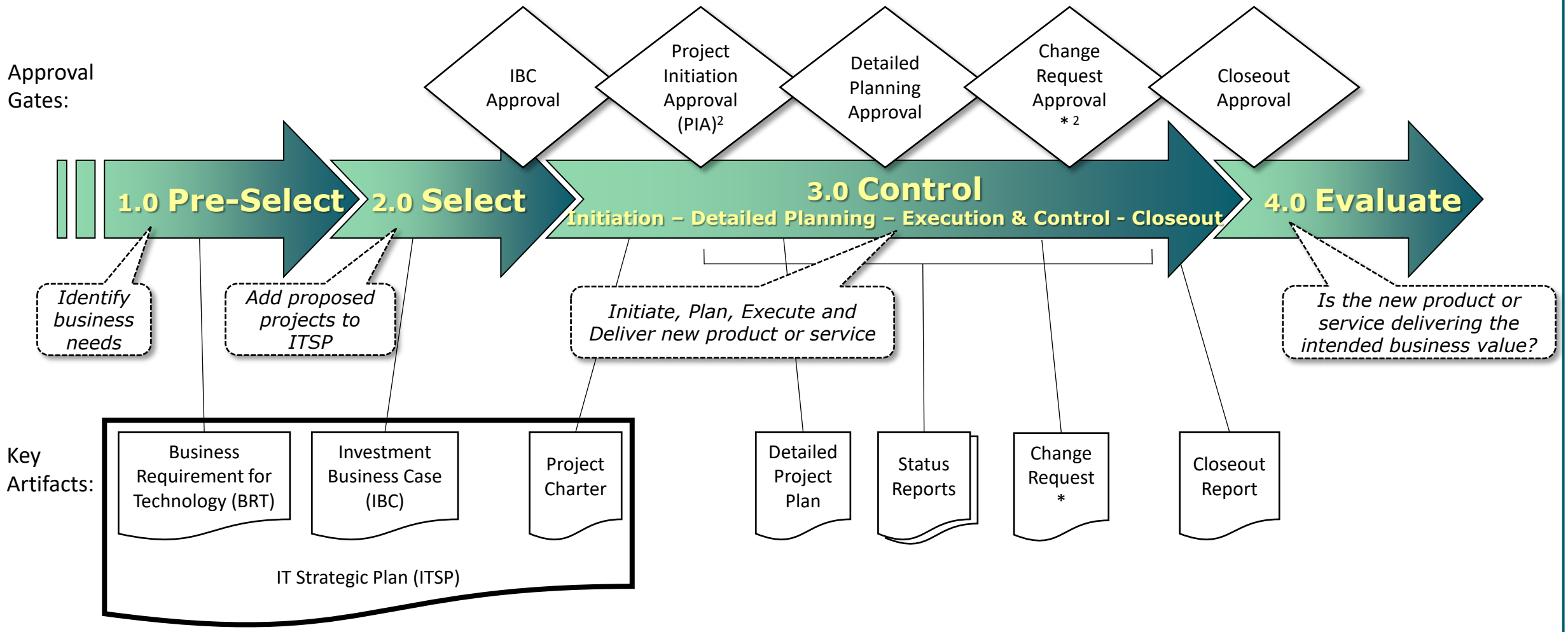
Example CTP E1 Lifecycle for Investment Business Case (IBC) approval, moving into Initiation phase.

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 1-2 projects: SOC approval required

* Change Request if needed

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

ITIM Lifecycle: 1.0 Pre-Select; 2.0 Select

1. 1.0 Pre-Select: Business Requirement for Technology: *This is the first step to a Proposed Project (or Proposed Procurement)*

2. 2.0 Select: Investment Business Case: *This is how the AITR establishes a Proposed Project*

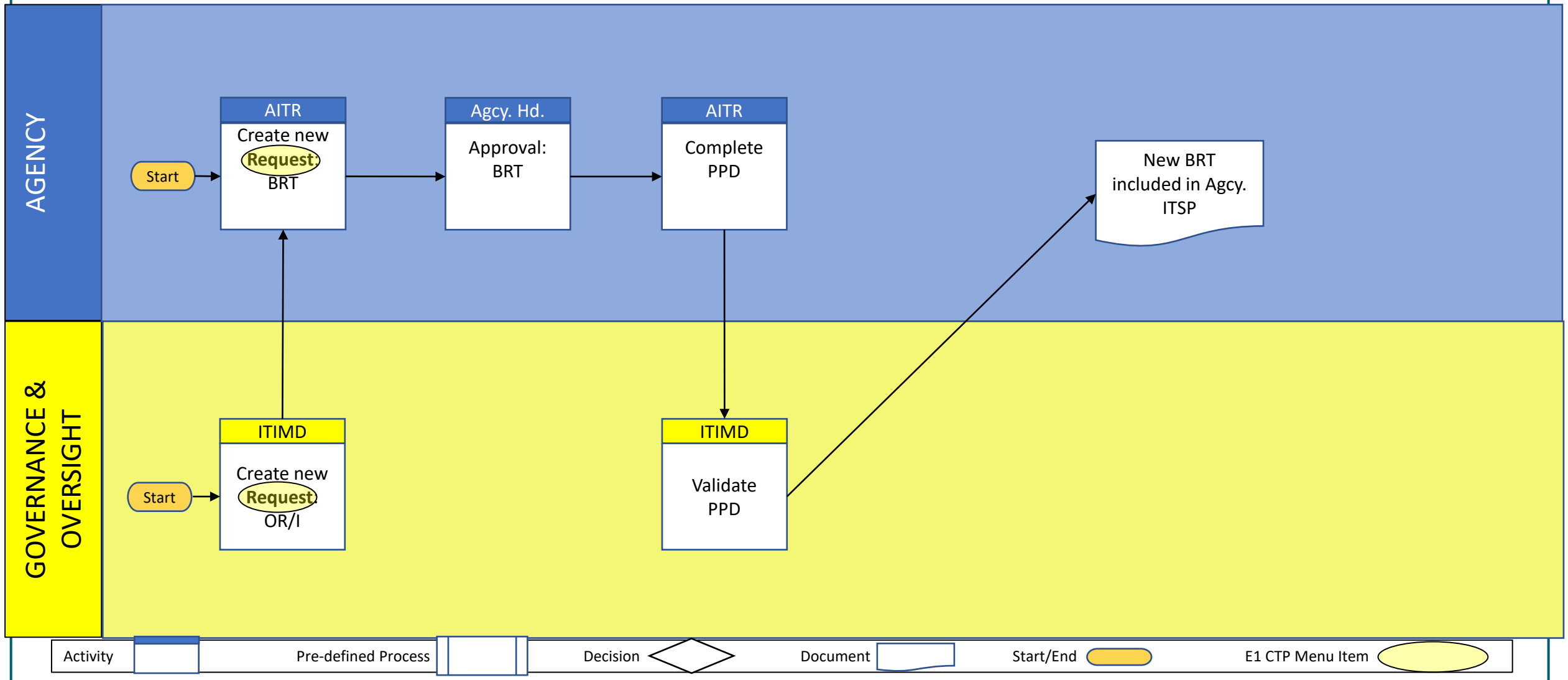
3. Student01 - - -> Student 01 Project;

    1. Agency 000;

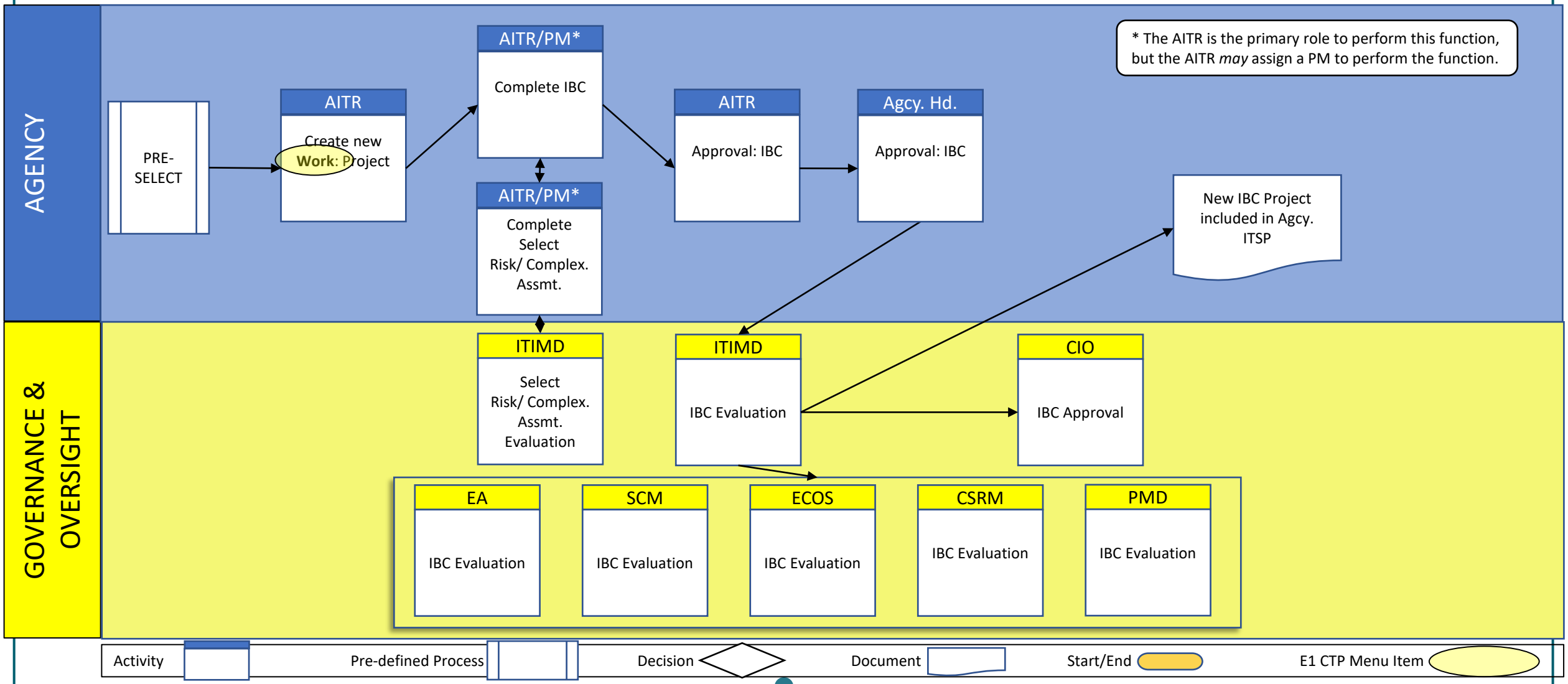
    2. Secretariat 000;

    3. AITR & Agency Head: “**Training Admin**”

1.0 Pre-Select



2.0 Select

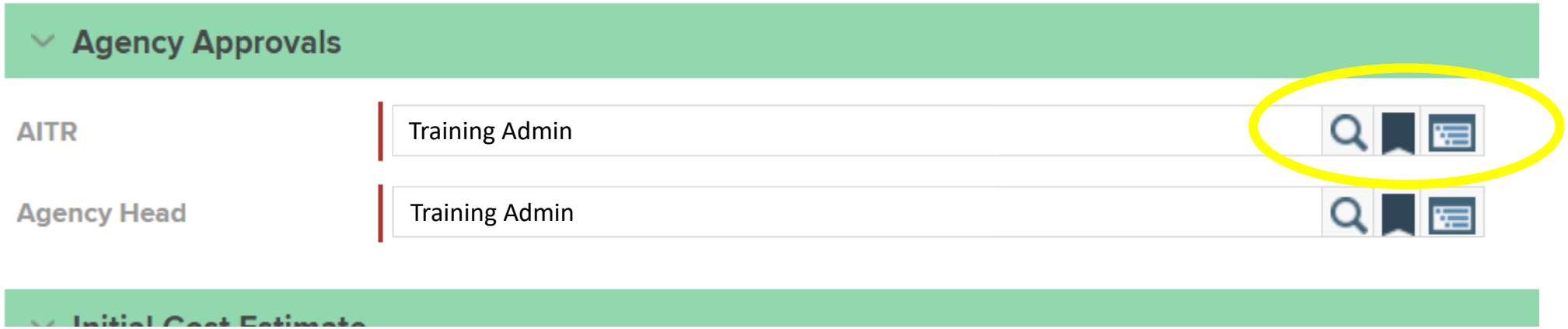

AGENCY
GOVERNANCE & OVERSIGHT
* The AITR is the primary role to perform this function, but the AITR *may* assign a PM to perform the function.
PRE-SELECT
AITR
Create new Work: Project
AITR/PM*
Complete IBC
AITR/PM*
Complete Select Risk/ Complex. Assmt.
AITR
Approval: IBC
Agcy. Hd.
Approval: IBC
New IBC 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

Pre-Select, Select & Initiation: Differences by Project Category

REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
Business Requirement for Technology (BRT)	Required	Required	Required	Required
Investment Business Case (IBC)	Required	Required	Required	Required
Business Case & Alternatives Analysis	Required	Required	Required	Required
Project Initiation Risk / Complexity Assessment	Required	Required	Required	Required
Cost Benefit Analysis	Required	Required	Required	Optional
Charter, with Project Team Organization Chart	Required	Required	Required	Required

Data Picker

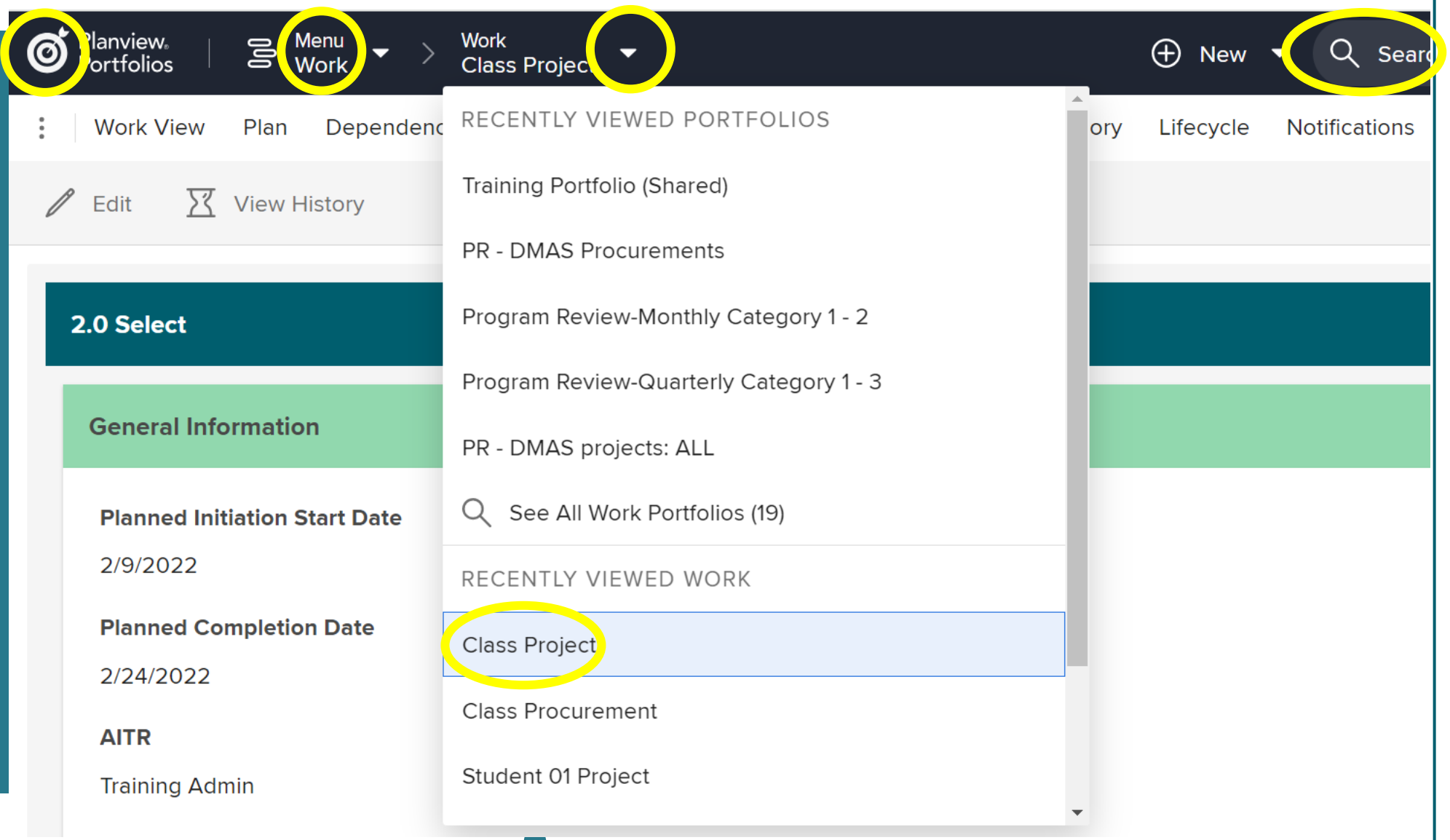
- Allows only valid values



Find your Work Item

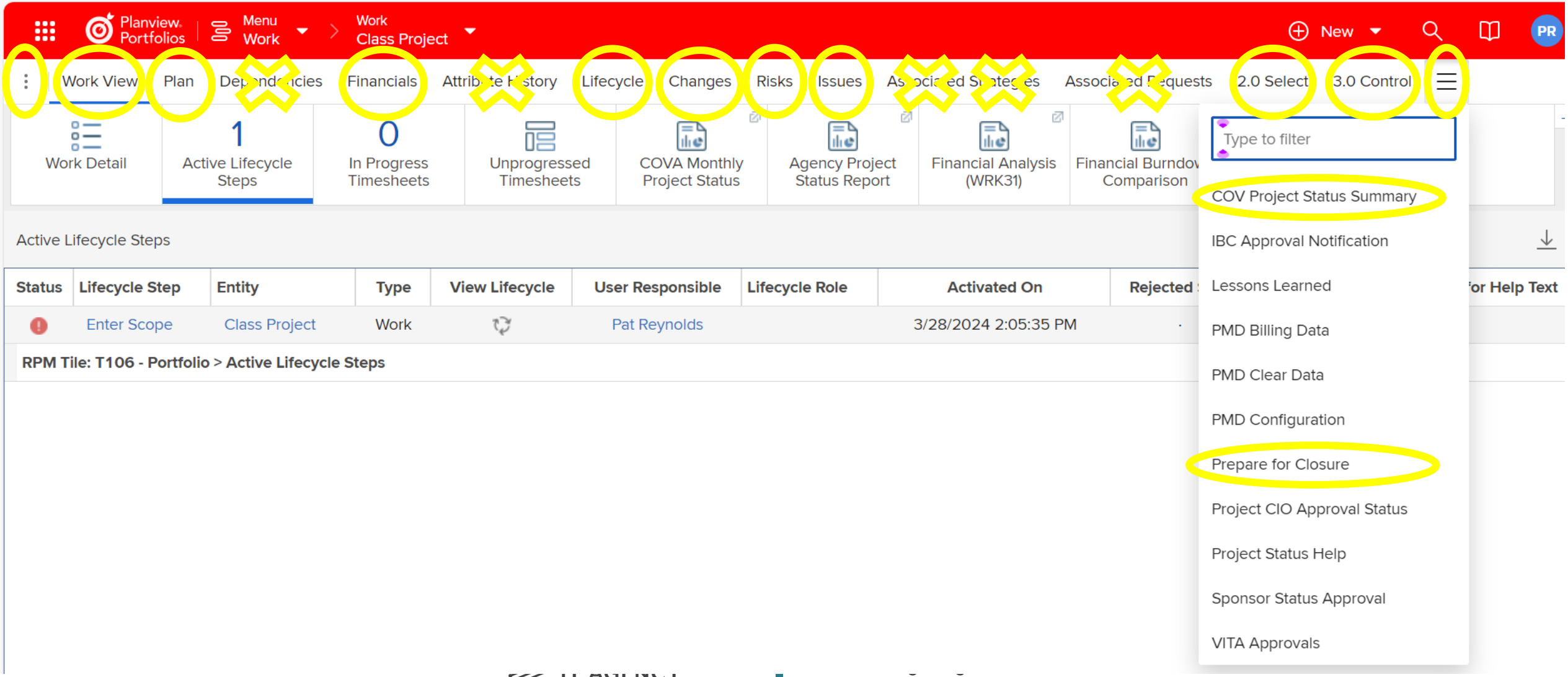
- Click on:
- Planview Portfolio
- Menu > Work
- Work > Student 01 Project

- ...or do a keyword search

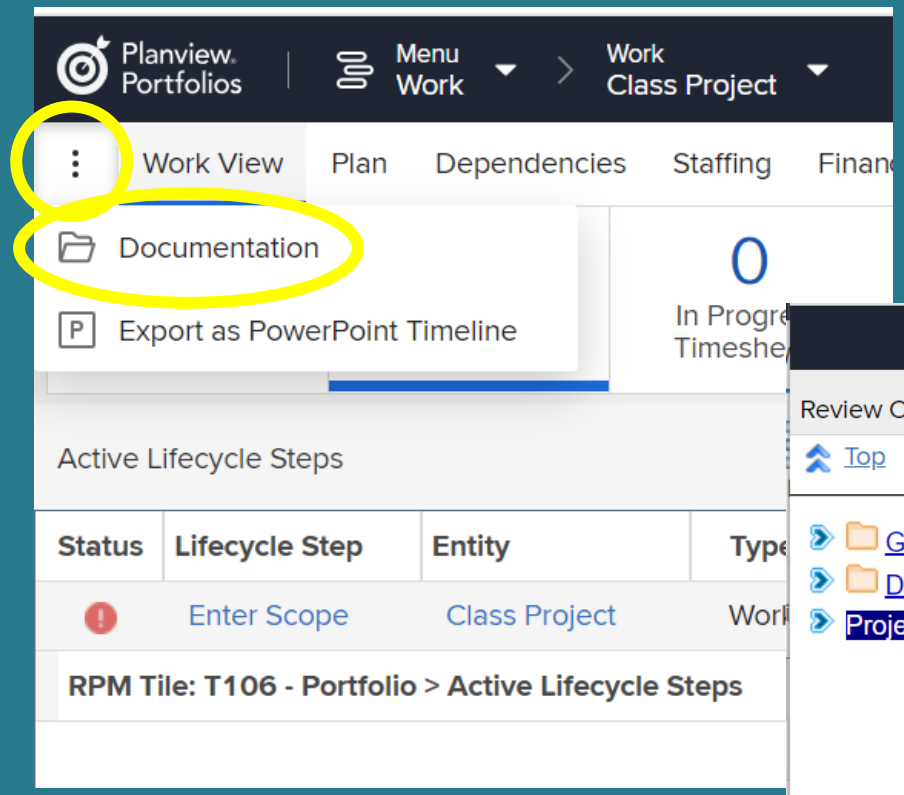


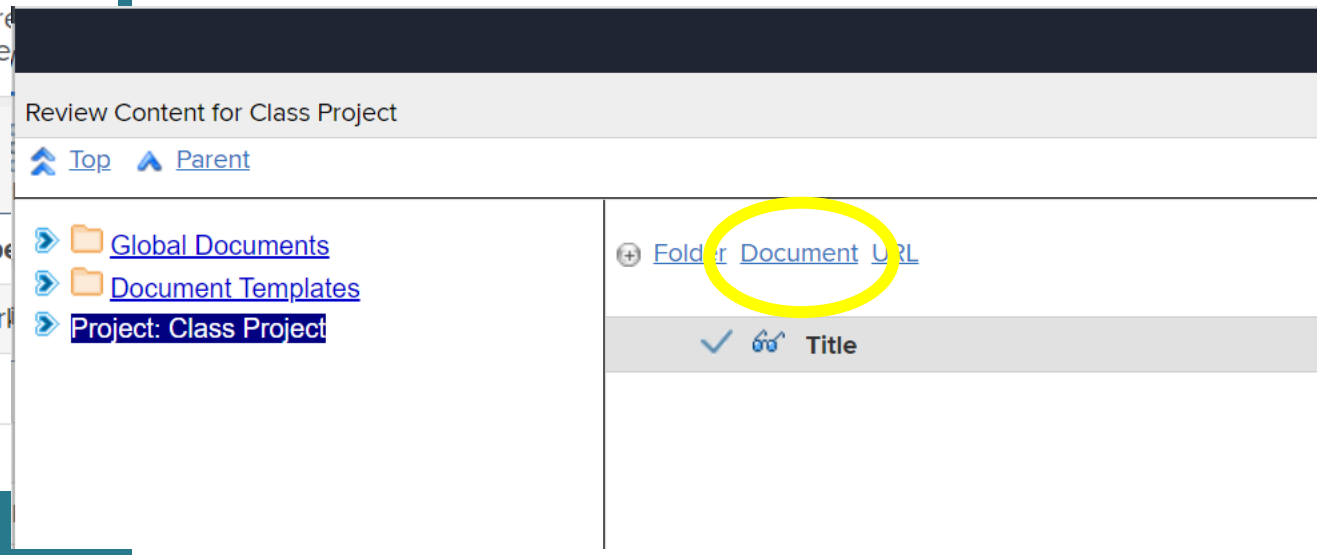
Tabs

- Typical Tab menu items:



Document Repository

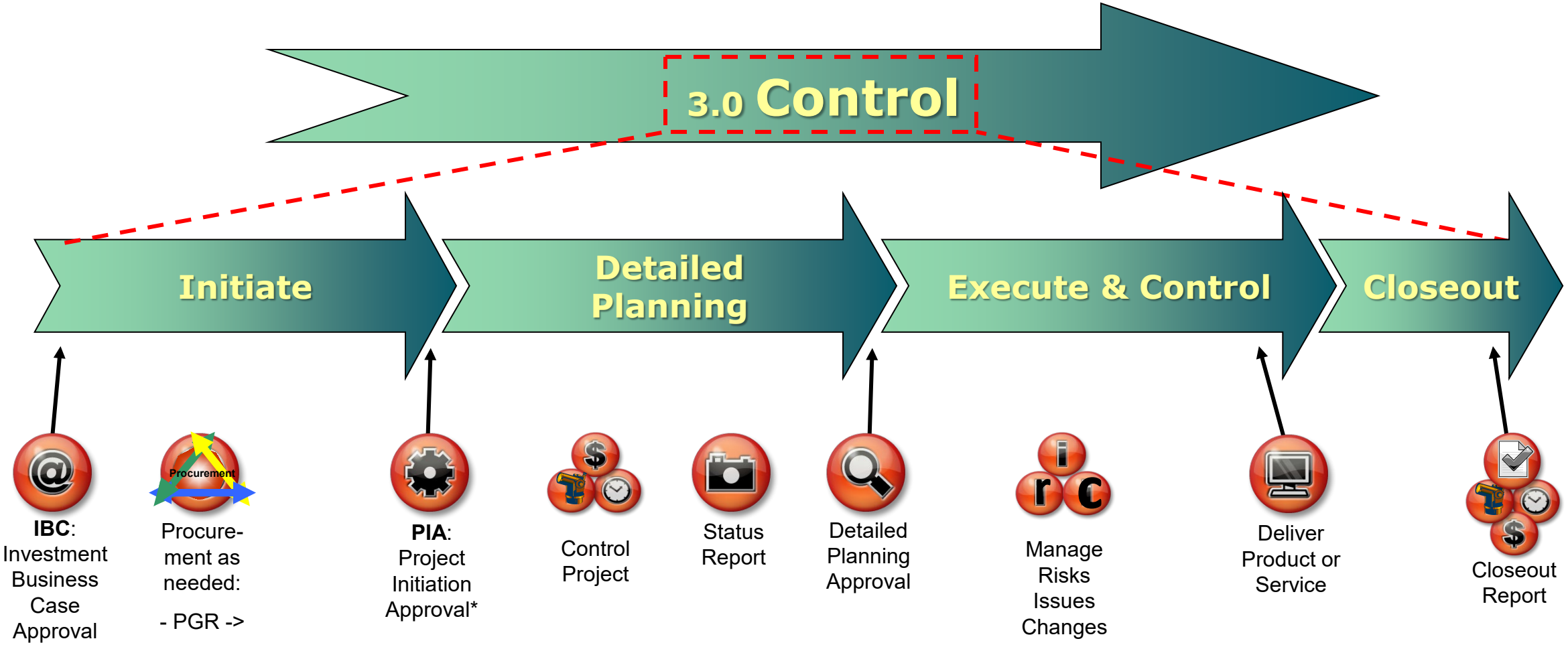




ITIM Lifecycle: 3.0 Control: Initiation

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…

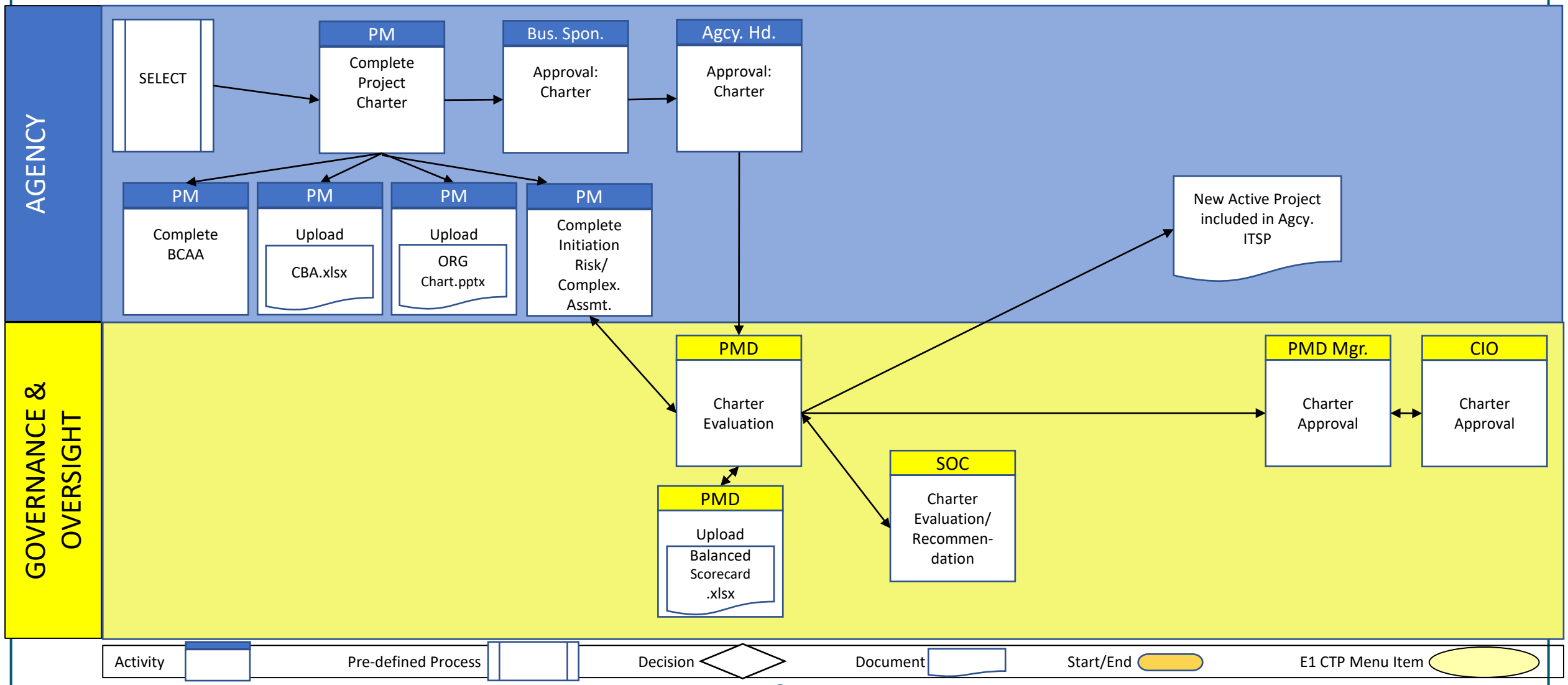
CPM Methodology Within The ITIM Lifecycle



*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 > PMD > CIO	Sponsor > Agcy Hd

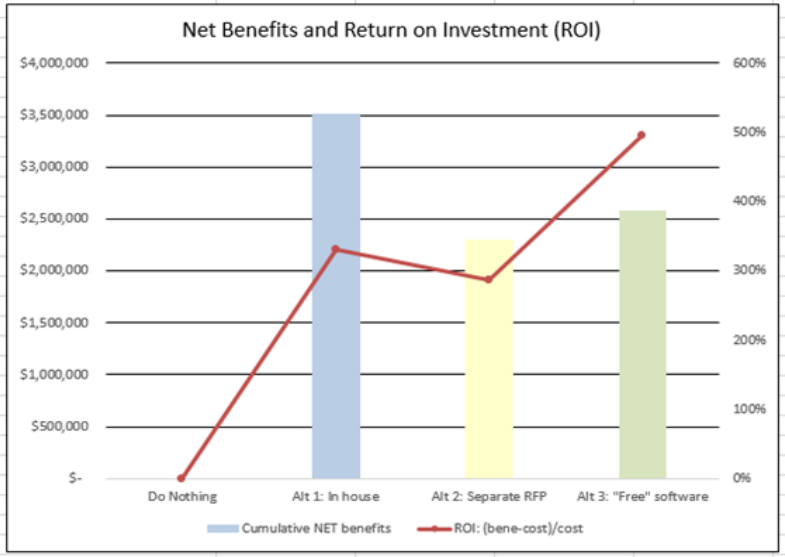
Cost-Benefit Analysis (CBA)

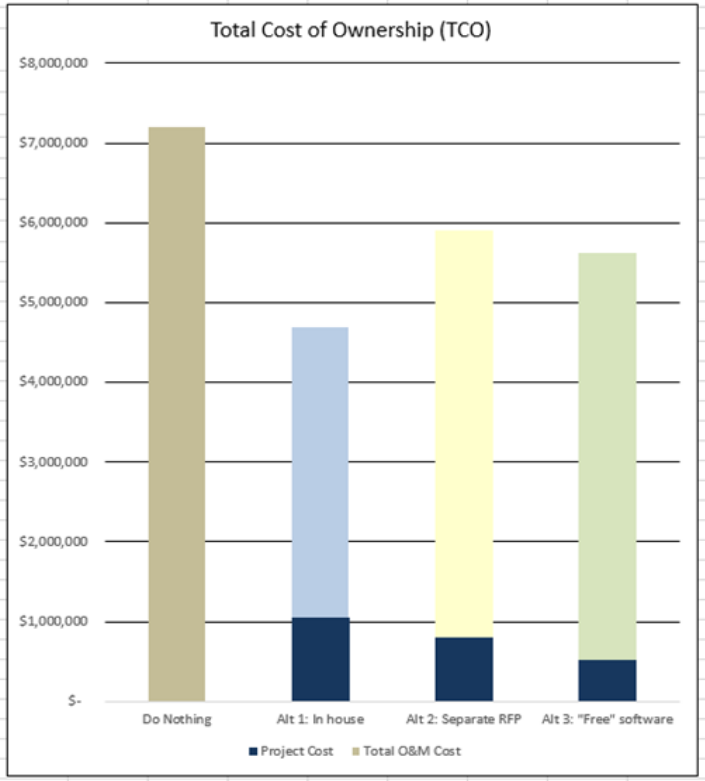
B19 ='Do Nothing'!M38

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



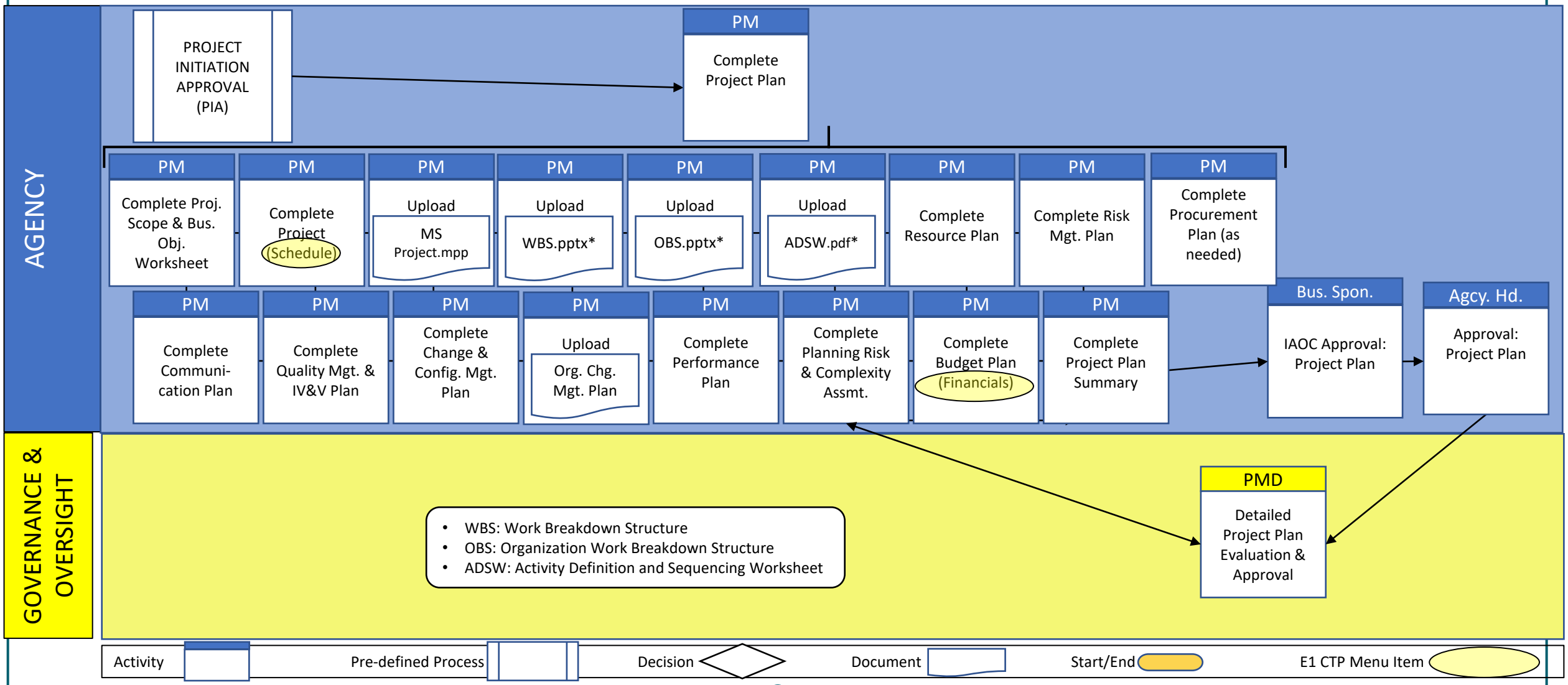


Summary | Do Nothing | Alt 1. | Alt 2. | Alt 3. | Notes | Instructions

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: “Plan”)	Required	Required	Required	Required
Risk Management Plan	Required	Required	Required	Required
Communication Plan	Required	Required	Optional	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	Optional	Optional
Change & Configuration Management Plan	Required	Required	Optional	Optional
Organization Change Management Plan	Required	Required	Optional	Optional
Performance Plan	Required	Required	Optional	Optional
Budget Plan (CTP: “Financials”)	Required	Required	Required	Required
Project Plan	Required	Required	Required	Required
Planning Risk / Complexity Assessment	Required	Required	Required	Required

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

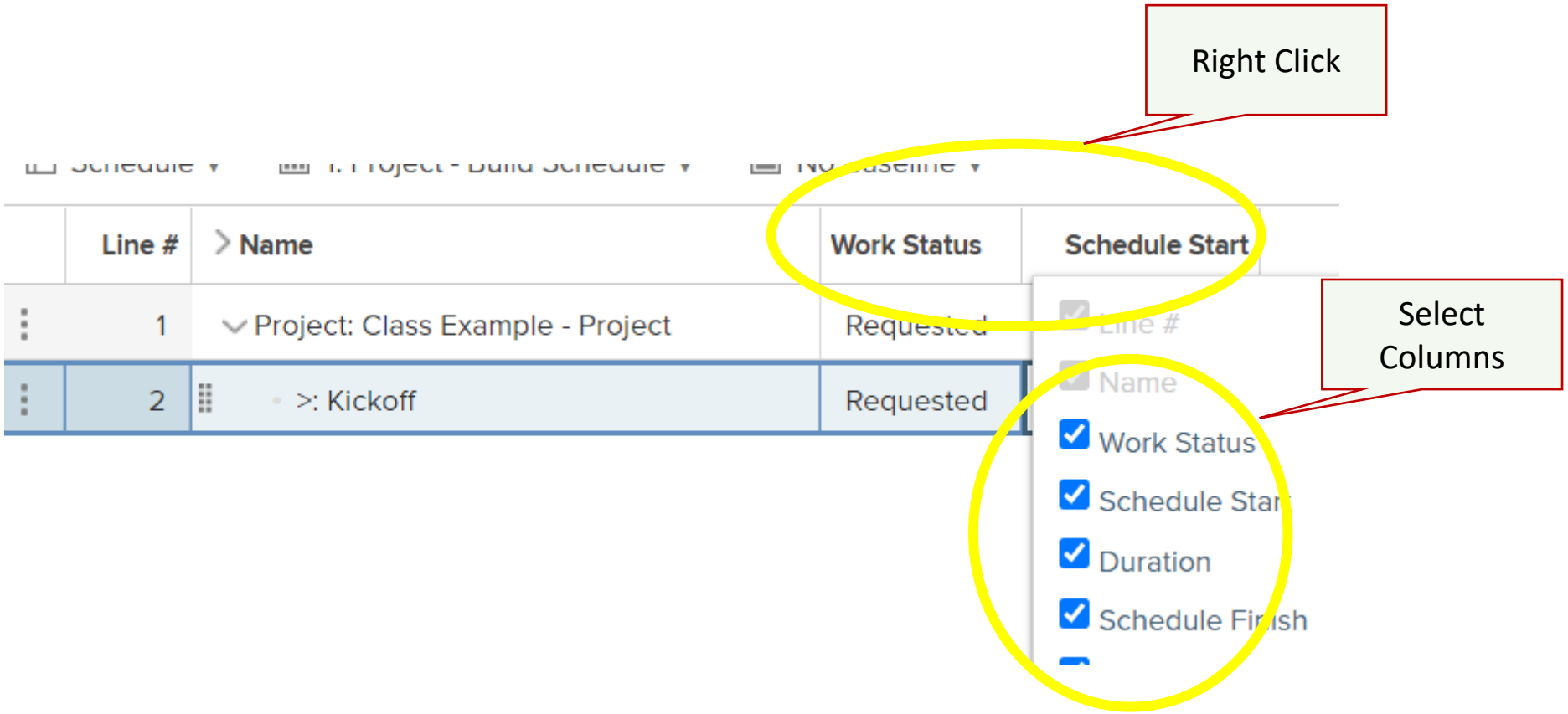
View
Work and Assignments (Schedule)

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				

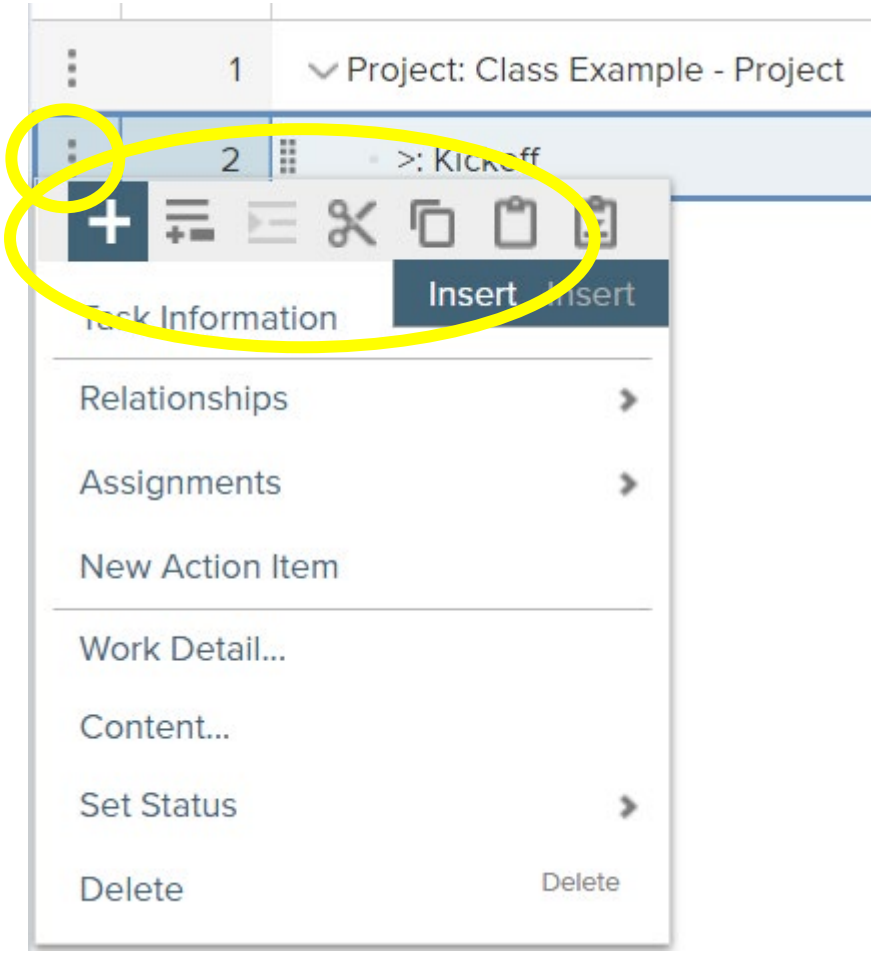
Plan

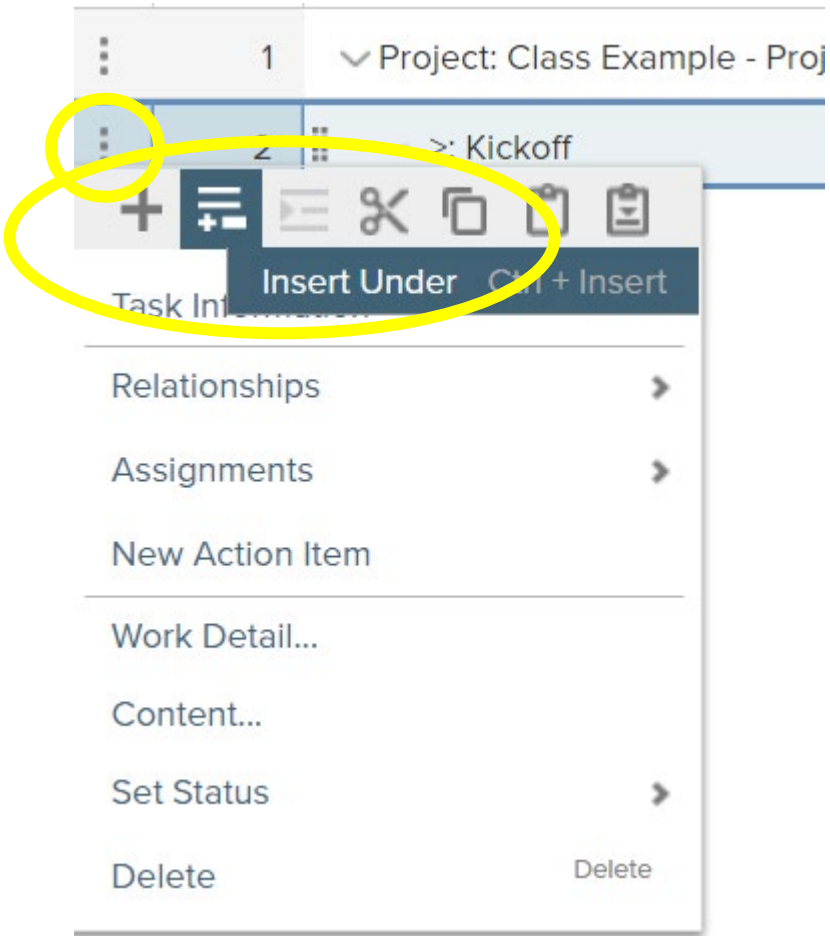
- Reveal / Hide Columns



Plan

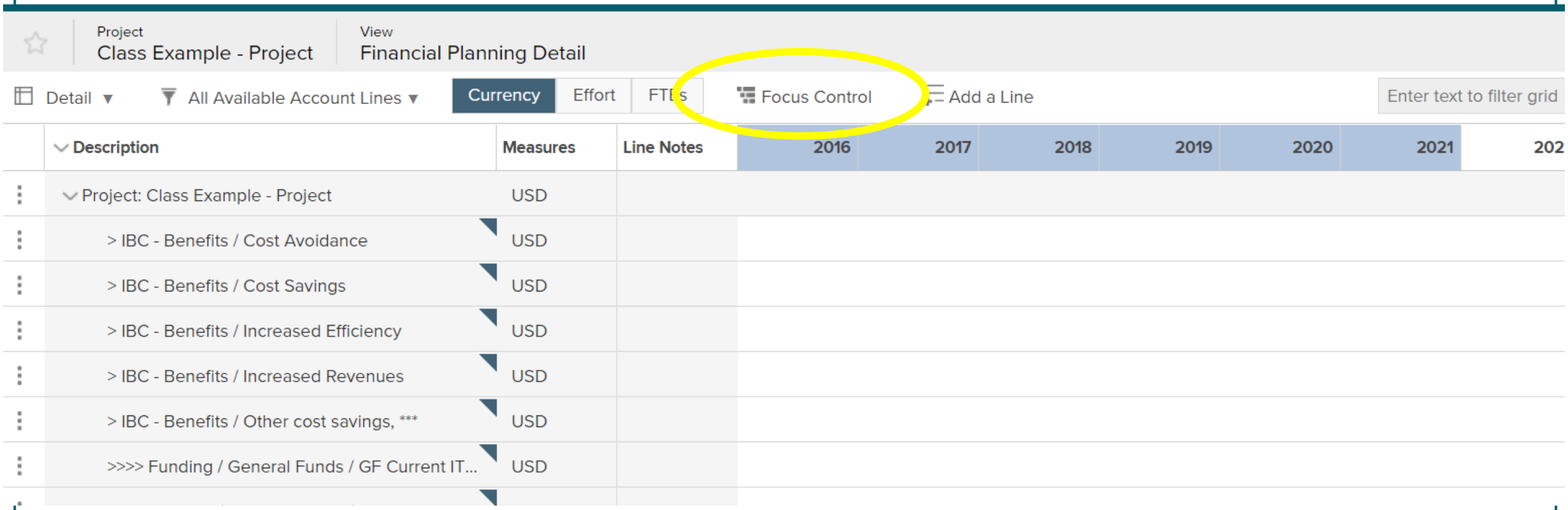
- Tasks: Insert, Insert Under





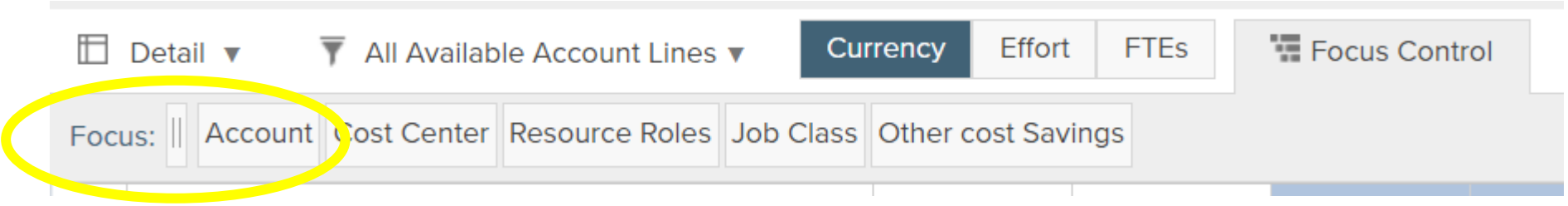
Financials

- Clean up your view: Focus Control

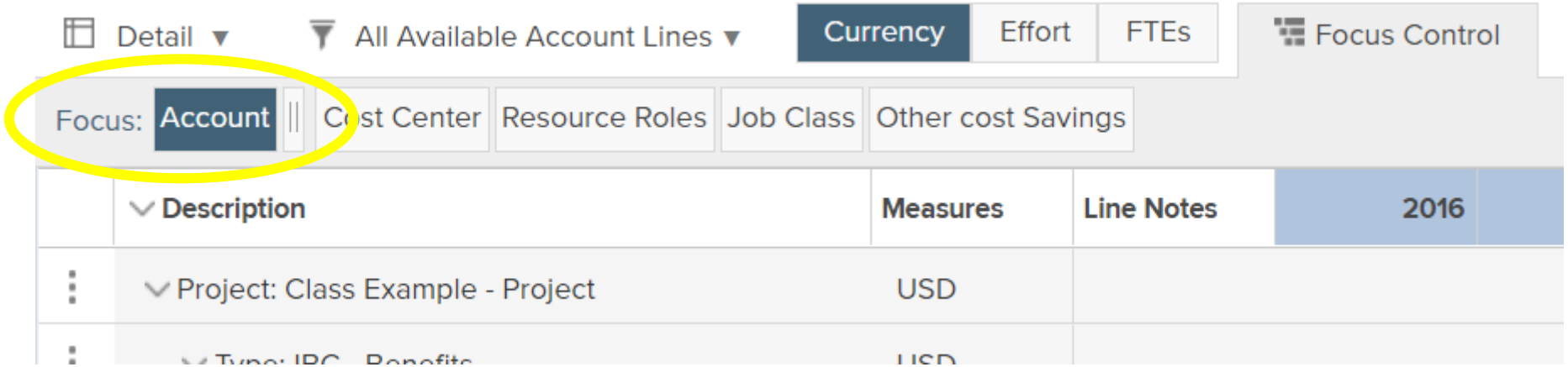


Financials

- Focus Control
  - From this…



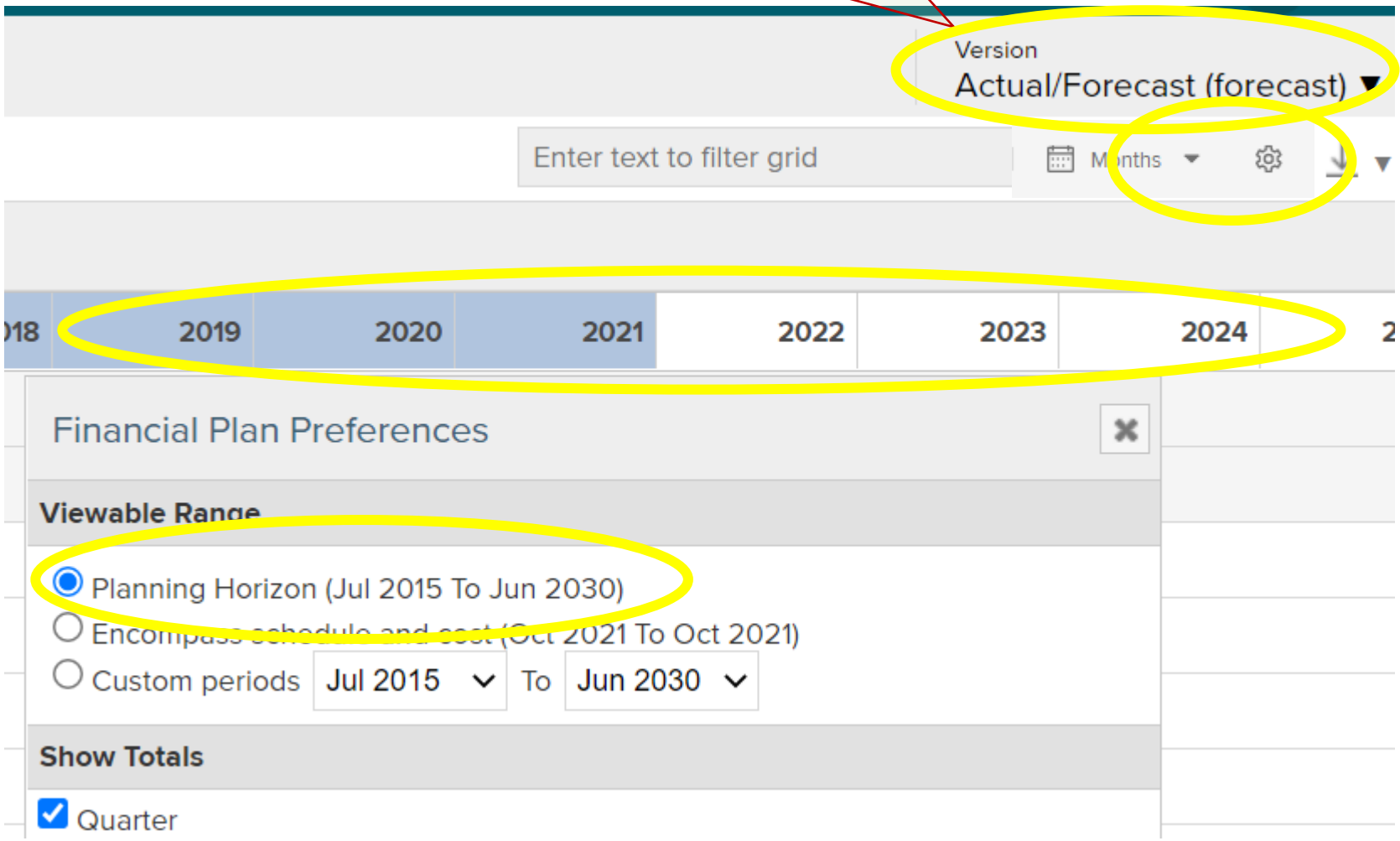
  - To this…



Financials

- Display Preferences
  - From this…

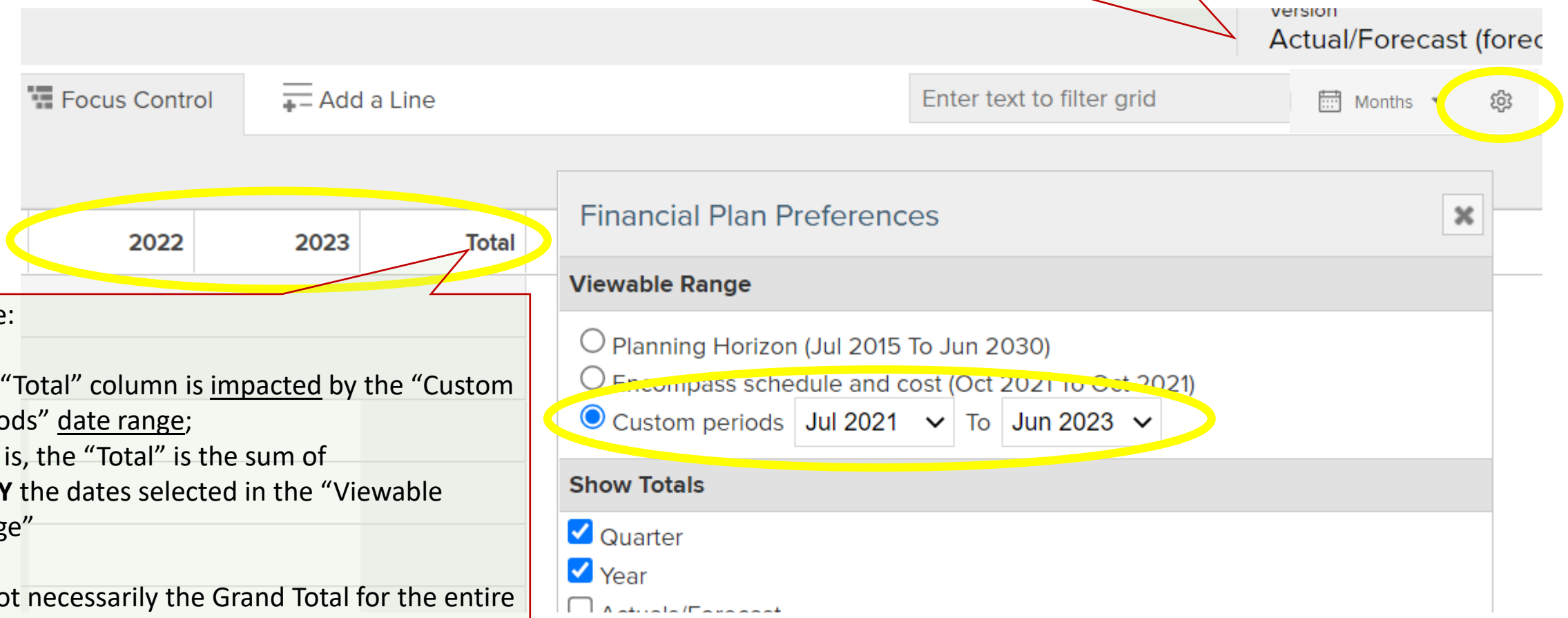
Verify that 'Version' = 'Actual/Forecast (forecast)



Financials

- Clean up your view: Viewable Range
  - To this…

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



Note:

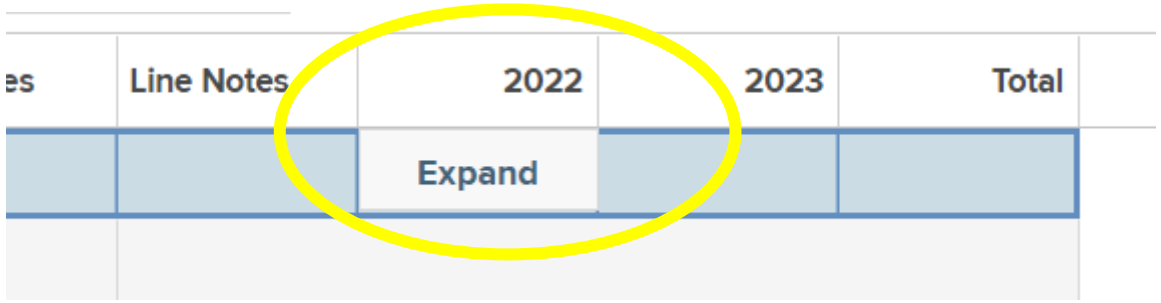
The "Total" column is impacted by the "Custom periods" date range;
that is, the "Total" is the sum of
ONLY the dates selected in the "Viewable Range"

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

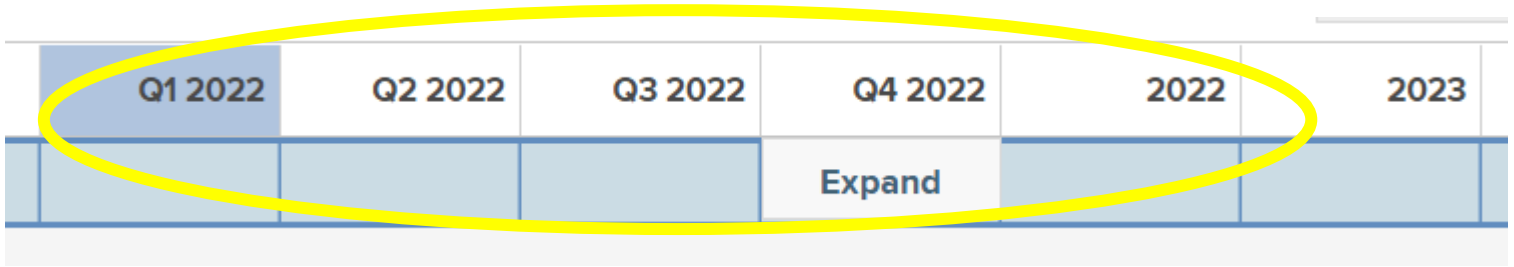
Financials

- Clean up your view: Expand / Collapse Fiscal Year, Quarter, Month
- (hover over column header)

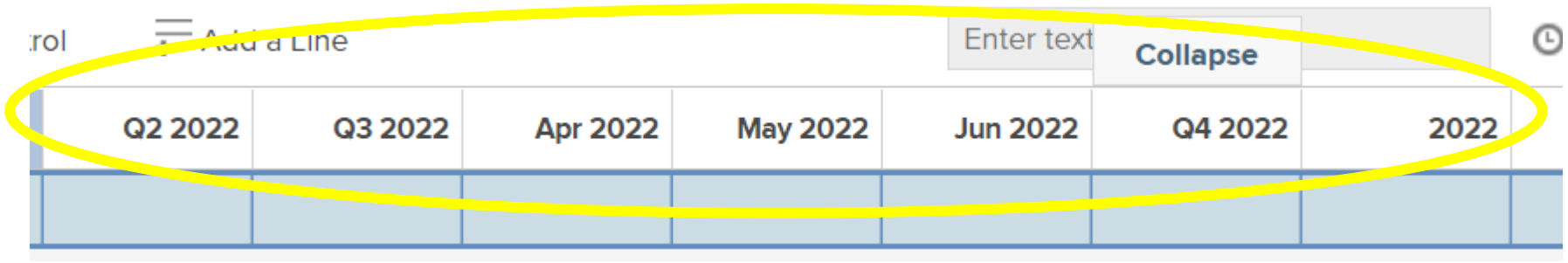
- From this…



- To this…



- To this…



Financials

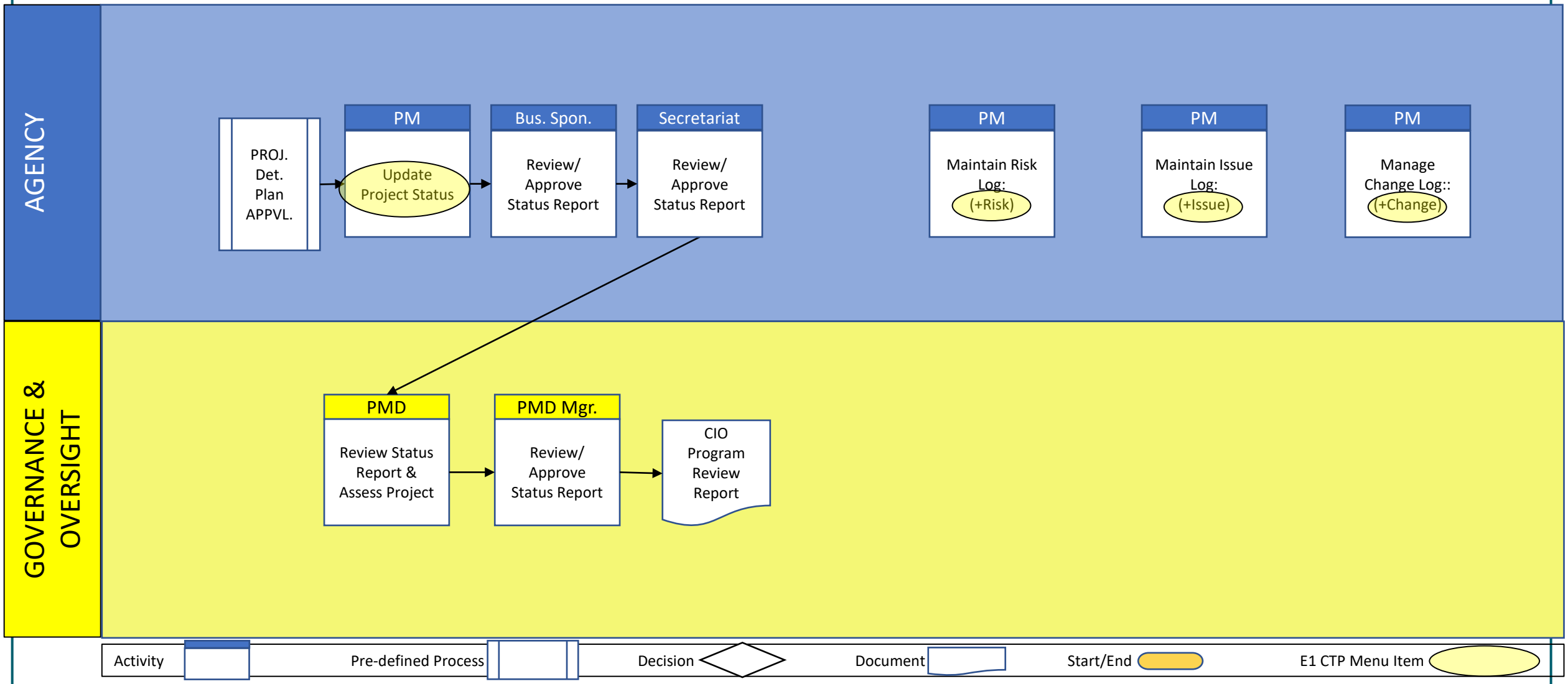
- Project Budget

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			

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, Closeout: Differences by Project Category

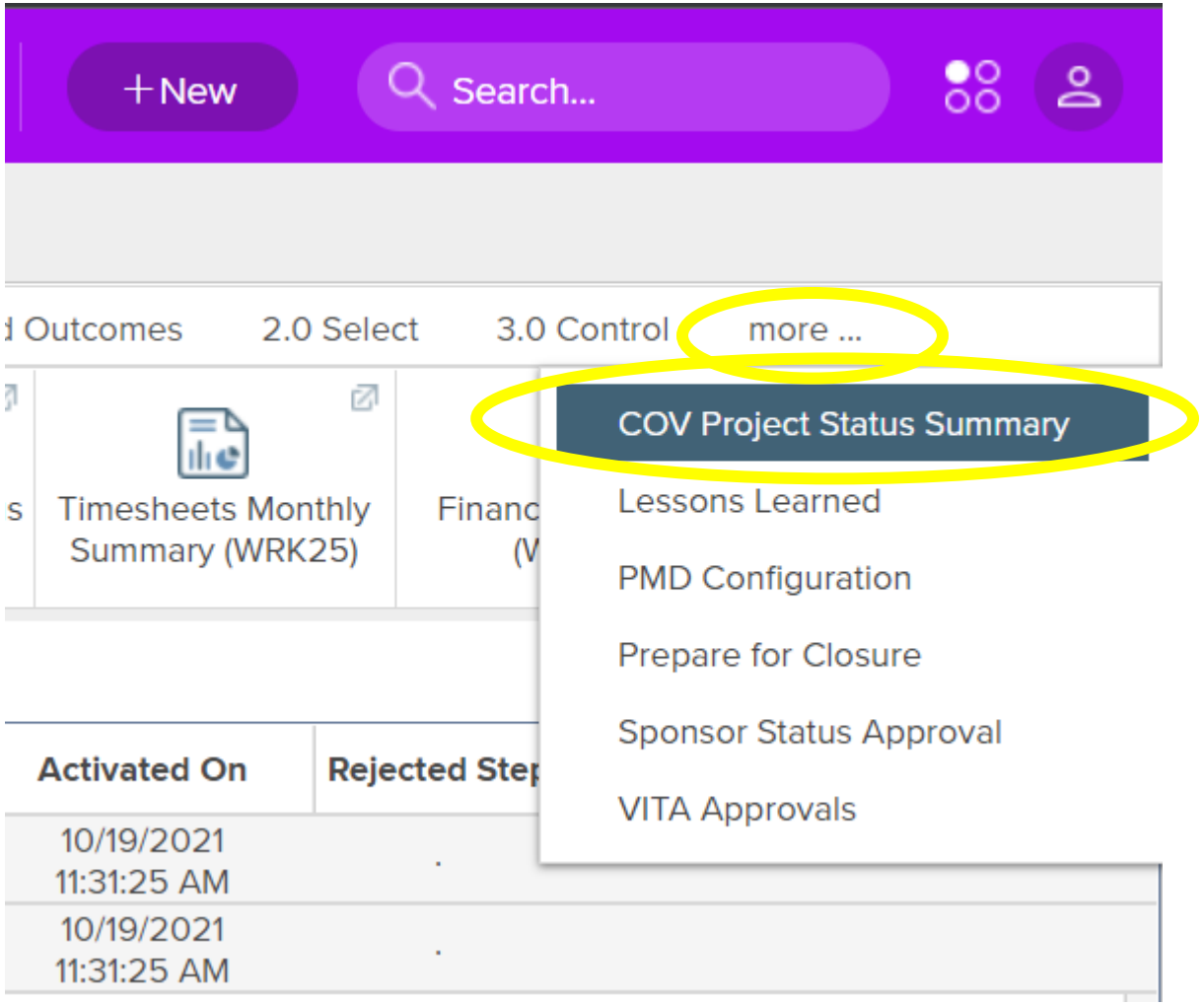
REQUIREMENT	CATEGORY 1	CATEGORY 2	CATEGORY 3	CATEGORY 4
In-Progress IV&V; to coincide with project phases	Required within 6 mo. of Planning Approval…	…then annual if project > 12 mo. duration.	Optional	None
Risk Log	Required	Required	Required	Optional
Issue Log	Required	Required	Required	Optional
Status Report in CTP	Required; monthly	Required; monthly	Required; quarterly	Required; quarterly
"Nominal" Change Control Request	+15%, or 4 mo., if project is ≤ 24 mo. duration	+20%, or 4 mo., if project is ≤ 24 mo. duration	+25%, or 4 mo., if project is ≤ 24 mo. duration	+35%, or 4 mo., if project is ≤ 24 mo. duration
"Significant" Change Control Request	>+15%	>+20%	>+25%	>+35%
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
Project Closeout Report	Required	Required	Required	Required

COV Project Status Summary

- Category 1 & 2: Monthly
- Category 3: Quarterly
- Category 4: Quarterly

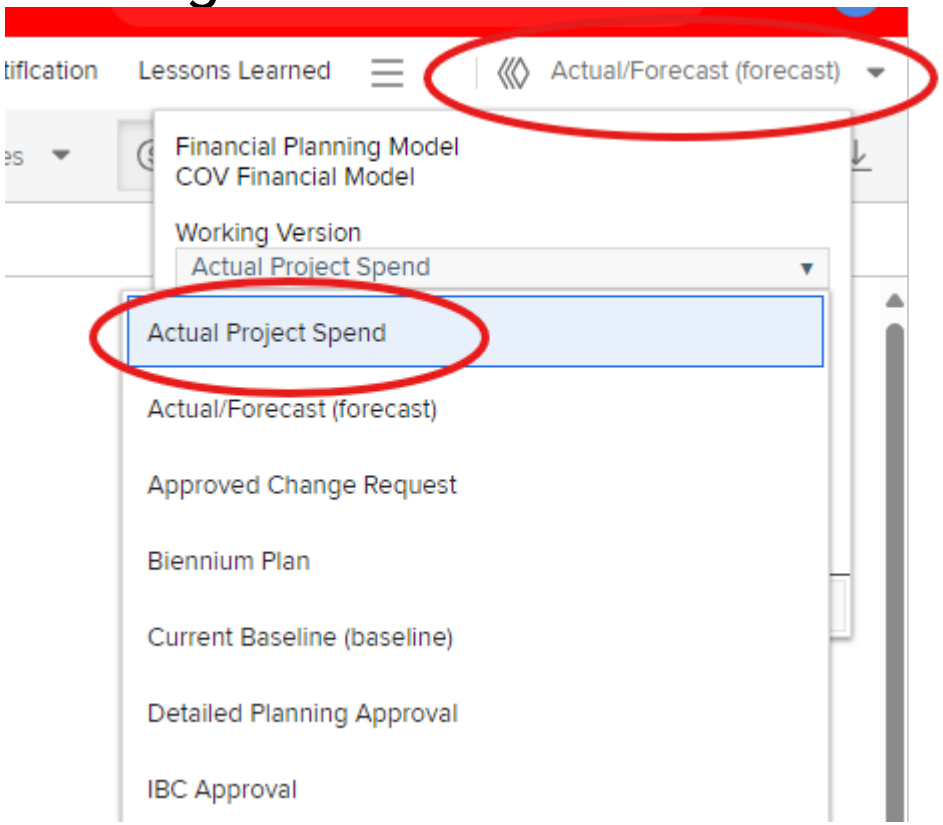
Update fields on the Form:

- 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 Project Spend version!
- Update each month / budget category with Actual Spend
  - Monthly, or Quarterly (Cat 3), or two Quarters (Cat 4)
  - Leave future (forecasted) amounts unchanged.



Project Status: Financials

- Use Actual Project Spend version!
- Update each month / budget category with Actual Spend

Work View | Plan | Dependencies | Staffing | Financials | Time Approval | Attribute History | Lifecycle | Changes | Risks | Issues | Associated Requests | 2.0 Select | 3.0 Control | COV Project Status Summary | IBC Approval Notification | Lessons Learned | Actual Project Spend

Type to filter | View Detail | Add a Line | All Available Account Lines | Focus Control | Years

Description	Measures	Line Notes	2023	Q1 2024	Q2 2024	Q3 2024	Apr 2024	May 2024	Jun 2024	Q4 2024	2024	2025	Total
Type: Funding Need	USD												
> Funding Need - General Funds	USD												
> Funding Need - Non-General Funds	USD												
Type: Budget Plan - Costs	USD								58,023	58,023	58,023		58,023
Internal Staff Labor	USD								12,345	12,345	12,345		12,345
Services	USD								45,678	45,678	45,678		45,678
> Software Tools	USD												
> Hardware	USD												
> Maintenance	USD												
> Facilities	USD												
> Telecommunications	USD												
> Training	USD												
> IV & V	USD												
> Contingency (Risk)	USD												
> Pre-Project Initiation	USD												
> Other Costs	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		

Project Status: Top Five Risks

- Using the CTP Risk tab / Risk Log:
- List / update top five risks each reporting period (monthly / quarterly)

Work View | Plan | Dependencies | Financials | Attribute History | Lifecycle | Changes | Risks | Issues | Associated Strategies | Assoc

Type to filter

Risk

ID	Name	Priority	Status	Type	Target Resolution
24107	HCM SaaS application roles and responsibilities	Medium	Closed	Schedule	9/30/
24110	HCM Internal Resource Availability	Medium	Closed	Schedule	1/31/
25474	Covid 19 & Governor Mandate	Medium	Closed		10/15/
25475	Middleware solution	Medium	Closed		11/22/
25476	Gaps in HCM standard functionality	High	Closed	Scope	12/17/
34373	Phase -3 Discovery may uncover gaps in Req	High	Closed	Budget	5/31/

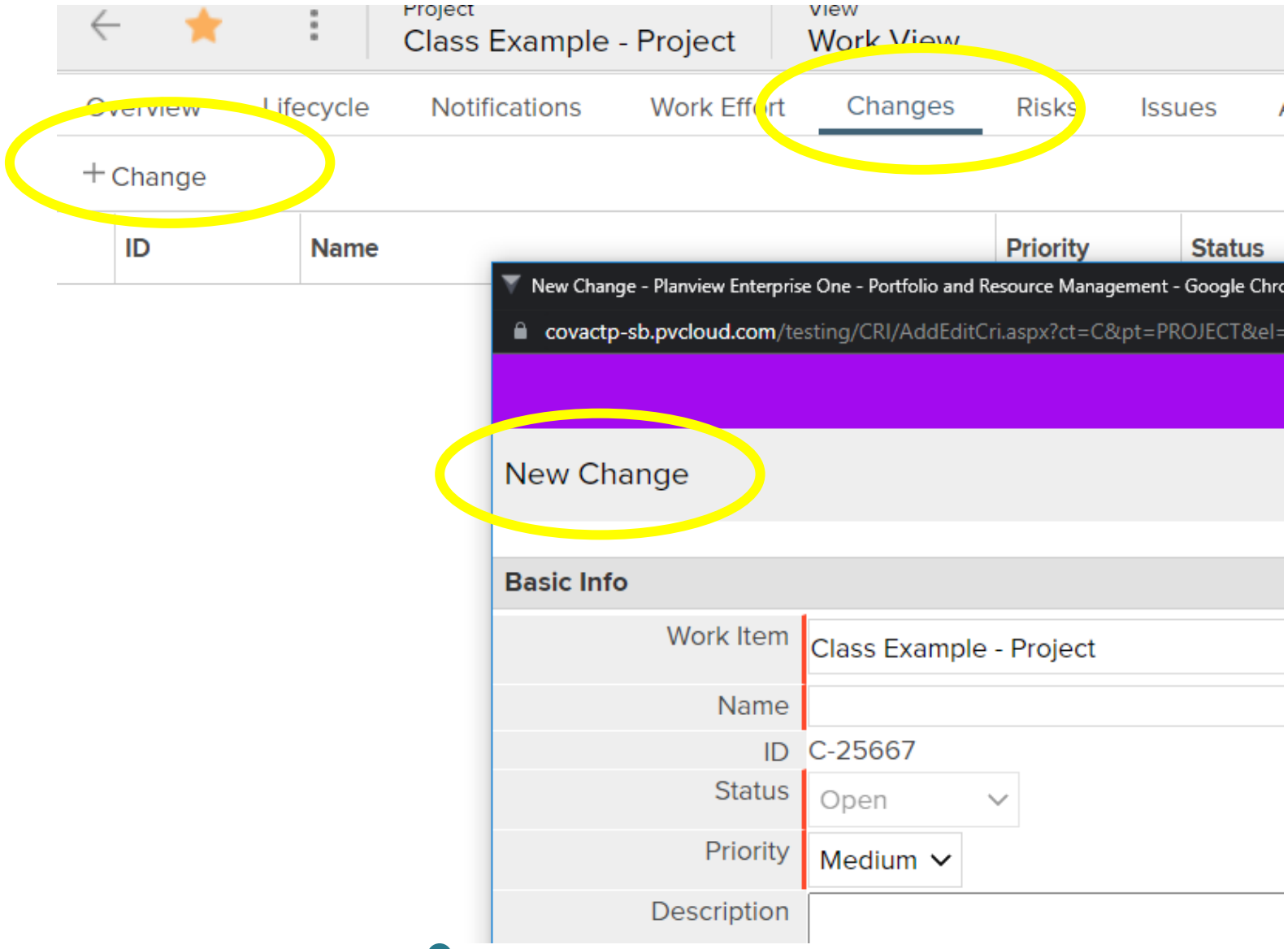
Governance Model: Risk/Complexity Categories for <u>Commonwealth Level</u> Projects

Commonwealth Level Project Categories 1-4				
		Complexity:		
		High	Med	Low
Risk:	**High**	**1**	**1**	**1**
	Med	2	2	3
	Low	3	4	4
Limited Oversight & Agency Level Project:		n/a	n/a	n/a

Scope, Schedule, Cost Baseline Change Request Thresholds	
Category 1	+/- 15%
Category 2	+/- 20%
Category 3	+/- 25%
Category 4	+/- 35%

Change Control

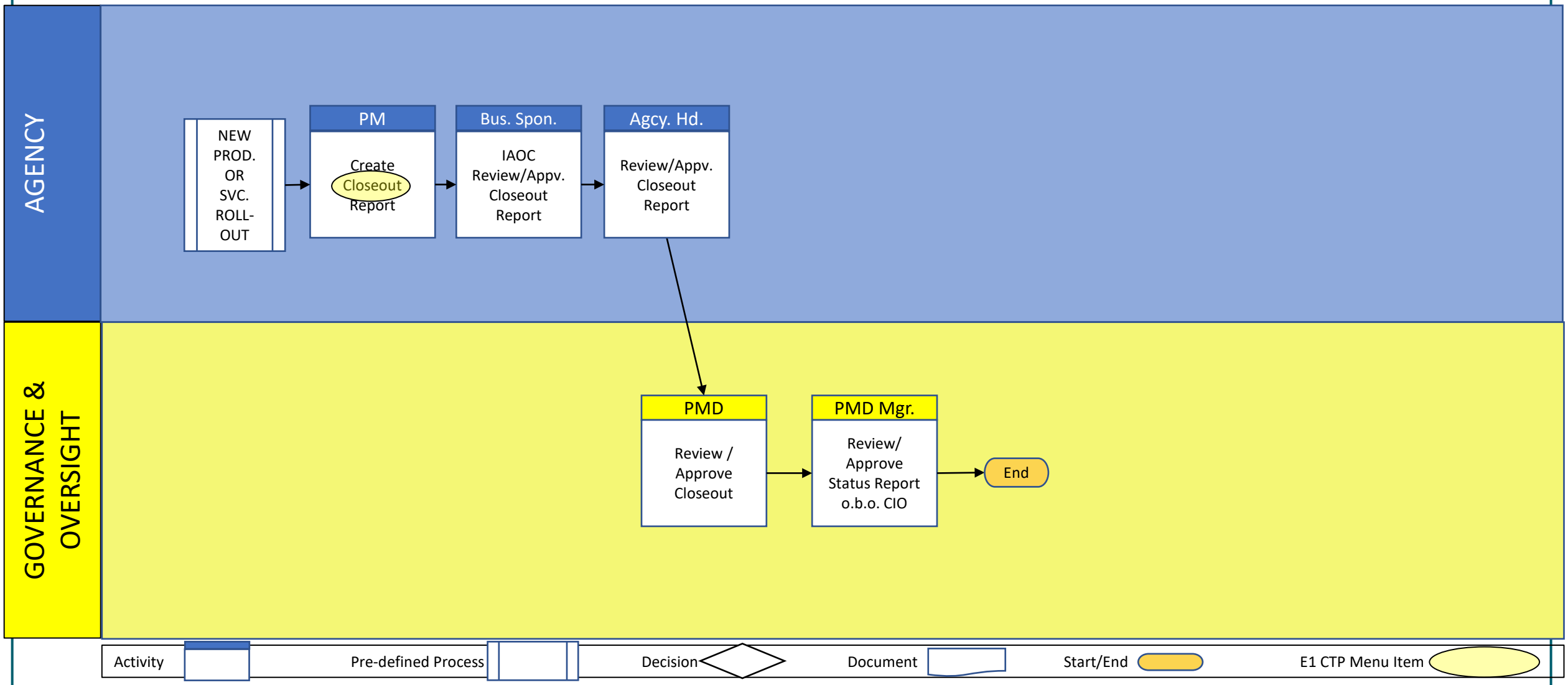
- Changes + Change



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. No longer a requirement, but it is a best practice.

3. Post-Implementation Review: 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?"*

4. May lead to opportunities for improvement

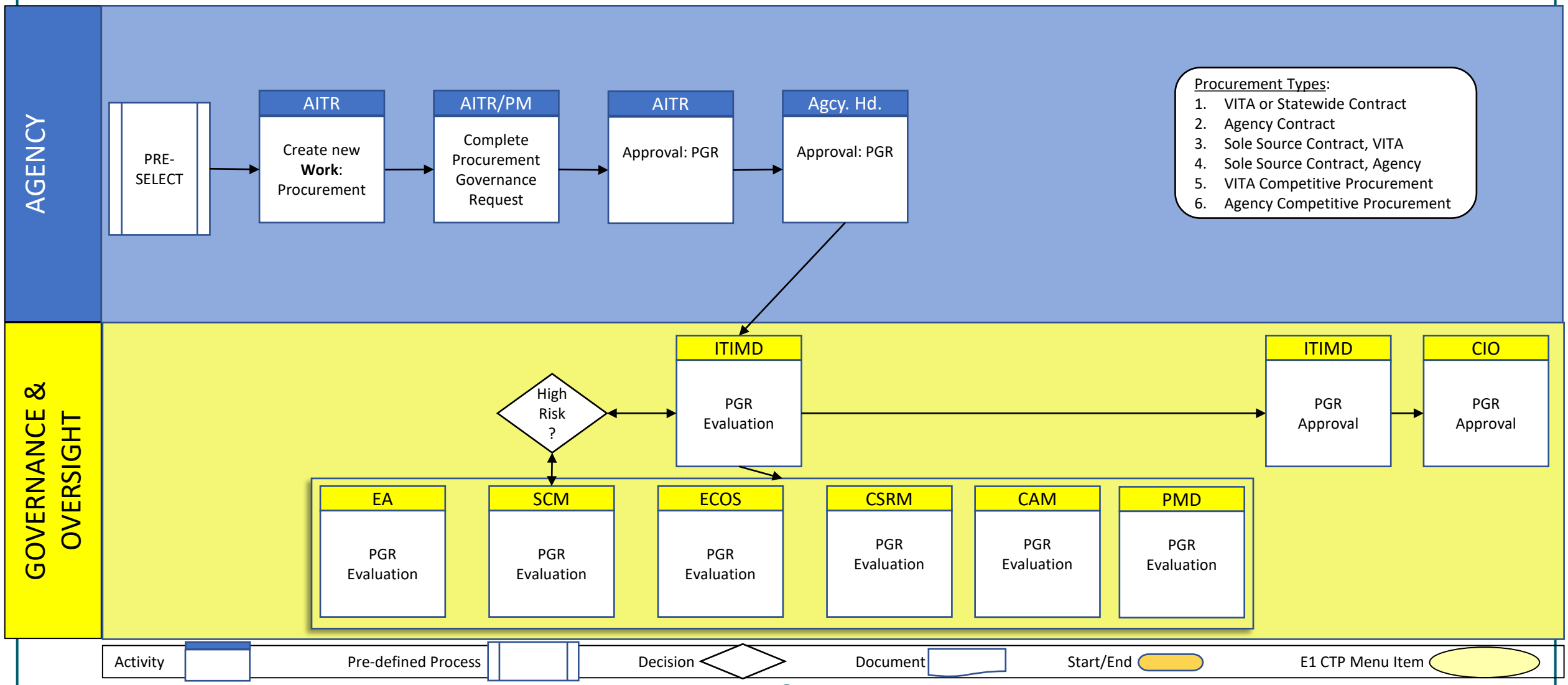
ITIM Methodology for IT Procurements (≥$250,000)

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

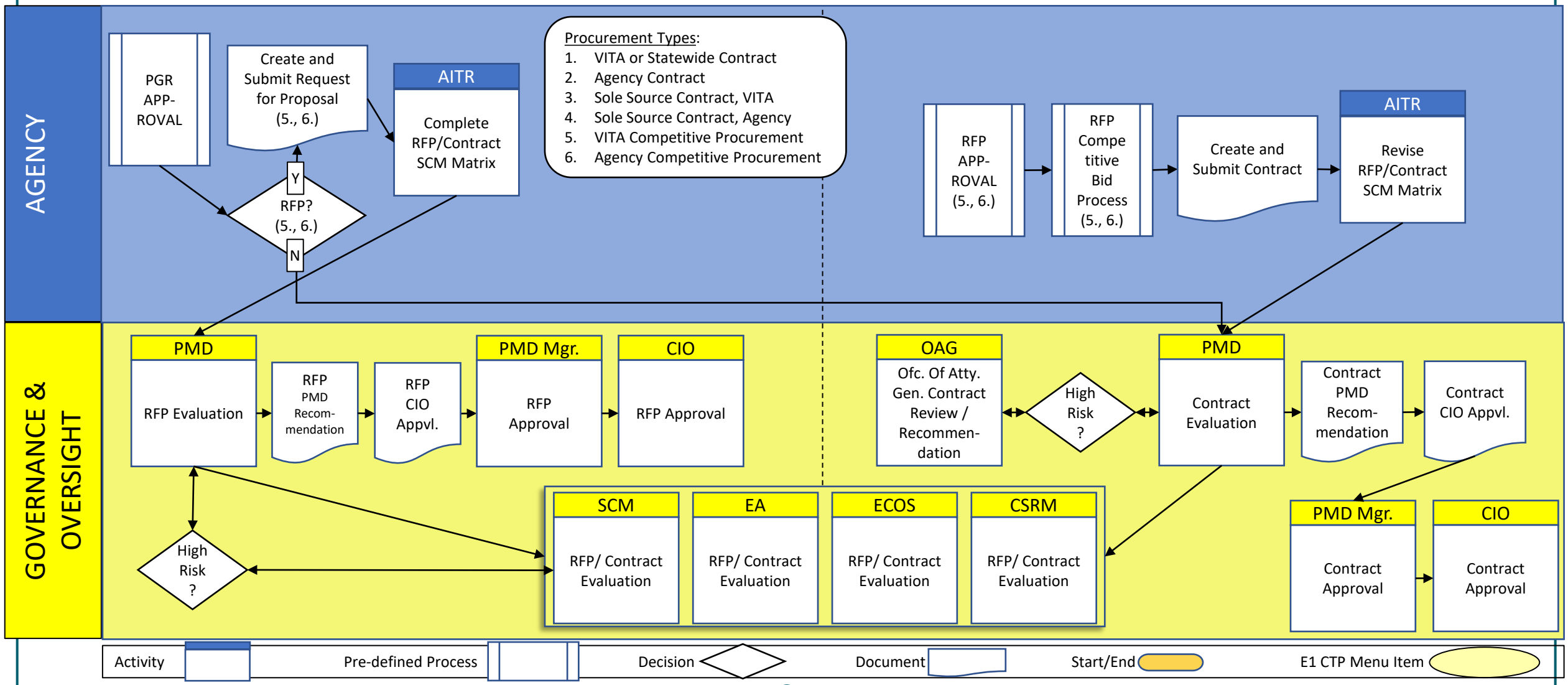
2. The ITIM Lifecycle is administered through **CTP**:

   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)

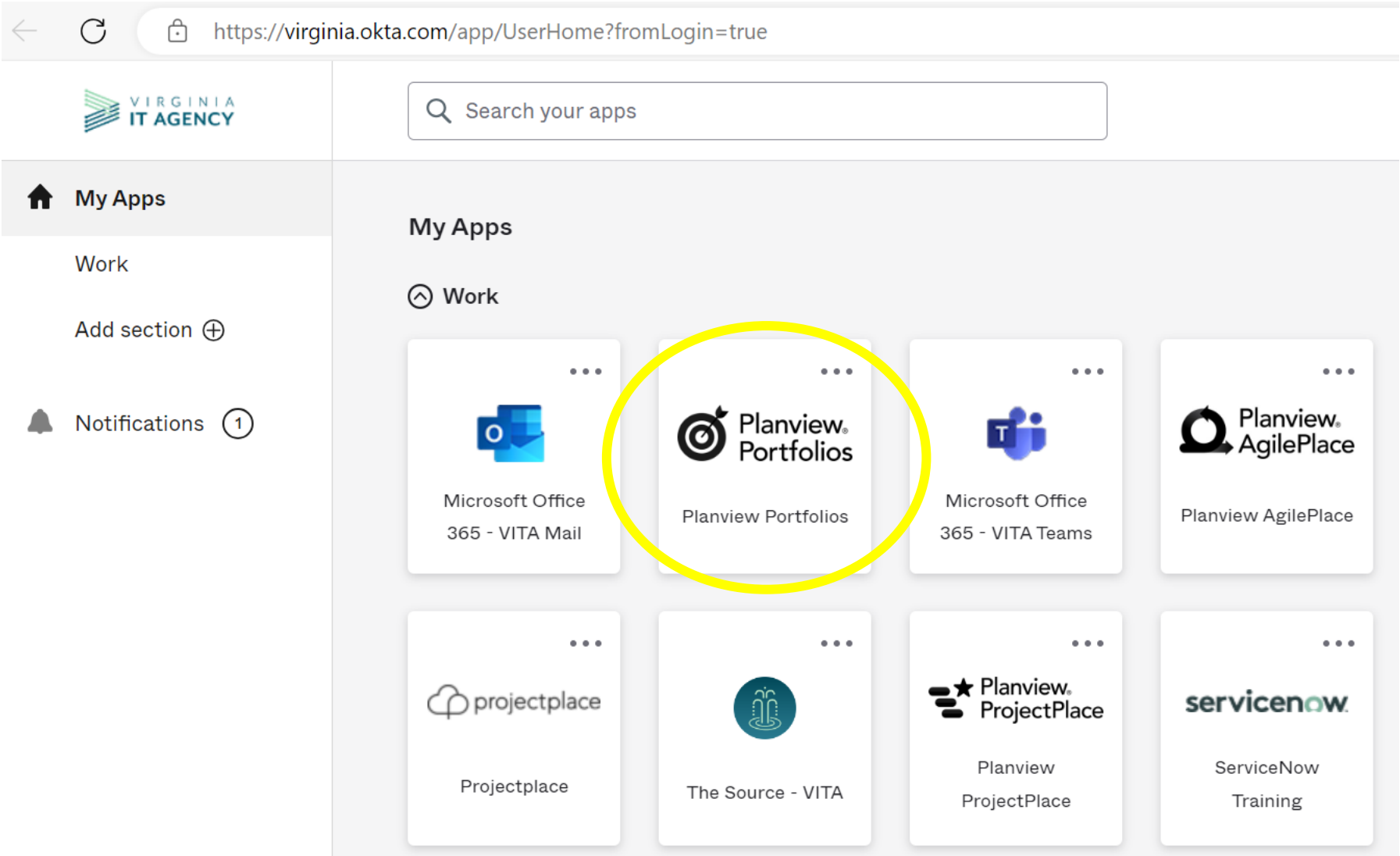


Control/Initiation (RFP/Contract Governance)



Wrap-up

1. Help resources
2. Scenarios
3. Next Steps

Single Sign-on (SSO)

- Use Chrome or Edge browser - - not IE!