



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

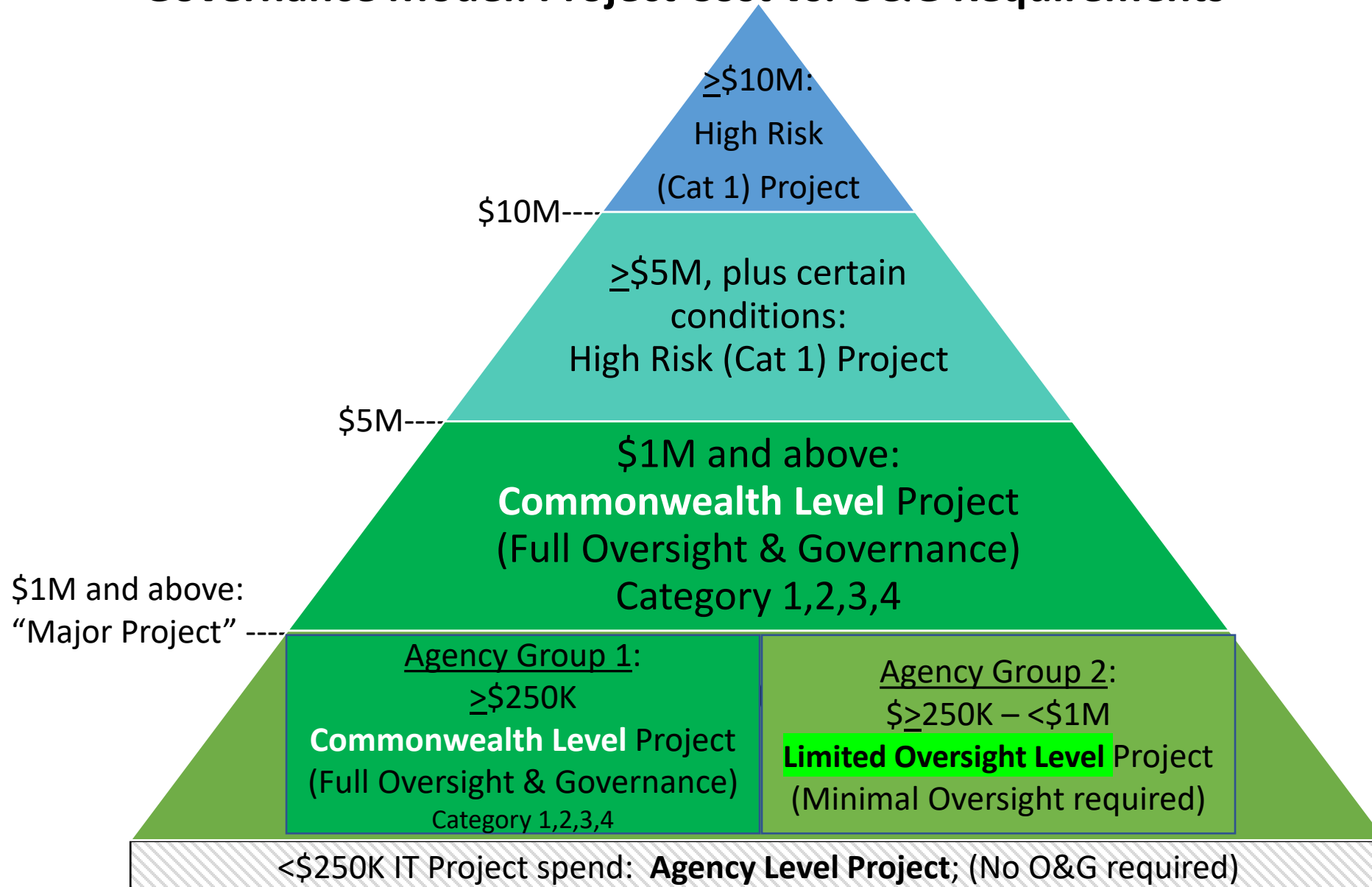
CTP E1 Orientation

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 | <ul style="list-style-type: none">• Project Manager (PM)• Agency IT Representative (AITR)• Business Sponsor (Bus. Spon.)• Agency Head / representative (Agcy. Hd.)• Secretariat Oversight Committee (SOC) |
| OVERSIGHT & GOVERNANCE | <ul style="list-style-type: none">• 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 \geq \$250K: **Commonwealth Level** Project: (Full Oversight & Governance)
- IT Projects $<$ \$250K: **Agency Level** Project: (No Oversight & Governance)

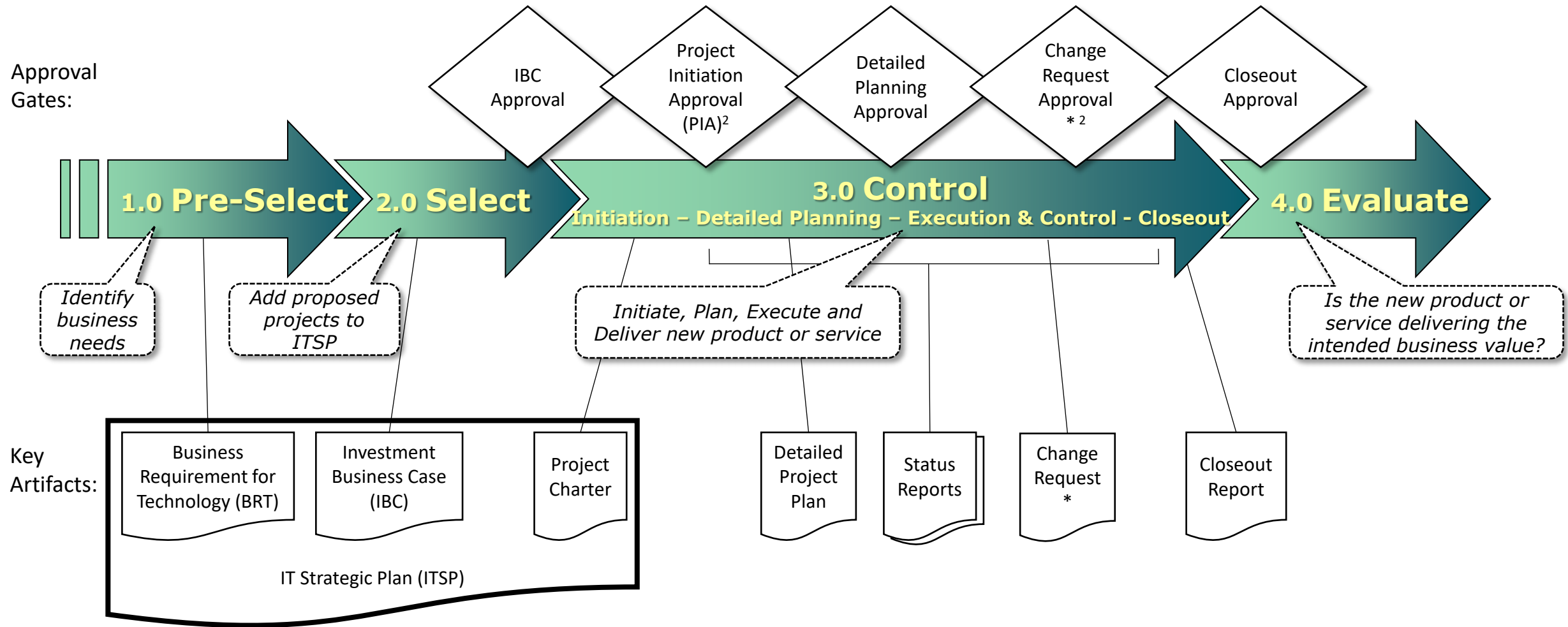
Agency Group 2:

- IT Projects \geq \$1M: **Commonwealth Level** Project: (Full Oversight & Governance)
- IT Projects \geq \$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

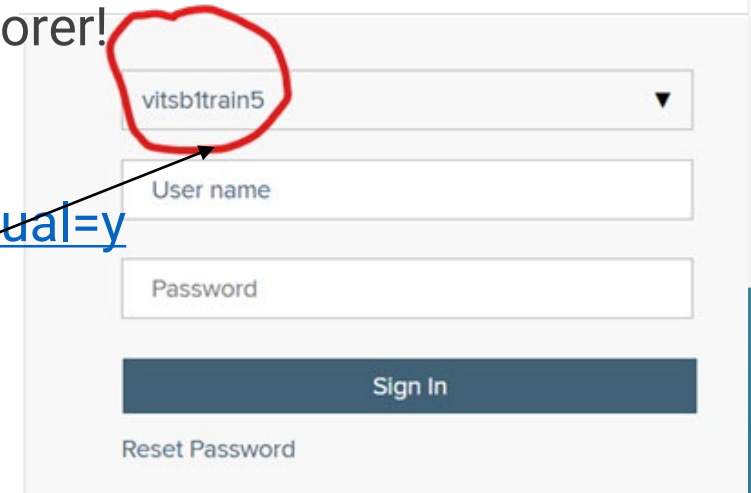
- A. Primary Navigation Bar: “Banner”
- B. My Overview: ...is all about YOU
- C. Work View
 - i. Tabs, Ribbon, Tiles

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: VITSB1TRAIN5 (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.)



The screenshot shows a login interface with the following elements:

- A dropdown menu for Environment, currently showing "vitsb1train5".
- A text input field labeled "User name".
- A text input field labeled "Password".
- A dark blue button labeled "Sign In".
- A link labeled "Reset Password" below the Sign In button.

A red circle highlights the Environment dropdown, and an arrow points from the text "VITSB1TRAIN5" in the instructions to this dropdown.

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”

The screenshot shows the CTP E1 Banner / My Overview page. The banner is a dark blue bar at the top containing menu items. The 'My Overview' menu item is highlighted with a light blue underline. The banner also contains a search bar and a 'My Account' link. Below the banner is a ribbon with various tiles, including 'Active Lifecycle Steps', 'My Scheduled Assignments', 'MY24 - My Assignments', 'Active Roles & LC Roles', 'My Action Items', 'My Active Change Requests', 'My Active Issues', 'My Active Risks', 'Next PGR Number to use', and 'more ...'. The 'Active Lifecycle Steps' tile is highlighted with a yellow box. Below the ribbon is a table titled 'My Active Lifecycle Steps' with columns: Status, Lifecycle Step, Entity, Type, View Lifecycle, User Responsible, Lifecycle Role, Activated On, Rejected Step, Escalated Step, and Hover for Help Text. The first row of the table is highlighted with a yellow box. Annotations include: 'Active Tile' pointing to the 'Active Lifecycle Steps' tile; 'Tiles' pointing to the ribbon; 'Search' pointing to the search bar; 'My Account' pointing to the 'My Account' link; '...banner...' pointing to the banner; 'ribbon' pointing to the ribbon; 'Lifecycle Step' pointing to the 'Lifecycle Step' column; 'Work Item' pointing to the 'Entity' column; and 'View Lifecycle' pointing to the 'View Lifecycle' column.

Active Tile

Tiles

Search

My Account

...banner...

ribbon

2 Active Lifecycle Steps

1 My Scheduled Assignments

MY24 - My Assignments

Active Roles & LC Roles

My Action Items

My Active Change Requests

My Active Issues

My Active Risks

Next PGR Number to use

more ...

Analyze

My Active Lifecycle Steps

| Status | Lifecycle Step | Entity | Type | View Lifecycle | User Responsible | Lifecycle Role | Activated On | Rejected Step | Escalated Step | Hover for Help Text |
|--------|--|-------------------|------|----------------|------------------|----------------|----------------------|---------------|----------------|---------------------|
| | Enter Procurement Governance Request (PGR) | Class Procurement | Work | | Pat Reynolds | | 10/5/2022 1:22:50 PM | . | | |
| | Enter Scope | Class Project | Work | | Pat Reynolds | | 2/9/2022 10:24:38 AM | . | | |

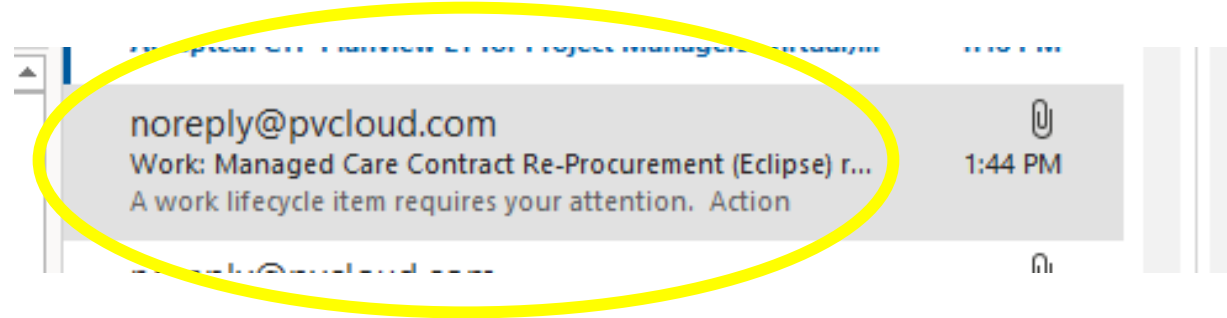
RPM Tile: T105 - My Planview > Active Lifecycle Steps

Lifecycle Step

Work Item

View Lifecycle

Email Notification



Email Notification

Work: Managed Care Contract Re-Procurement (Eclipse) requires your attention



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 \(Eclipse\)](#)



[Customer Success Center](#) | [Email Settings](#)

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 IRC - Scope for Class Project

Save as Draft Save and Complete Cancel Review Lifecycle Step

* Required Fields Collapse All

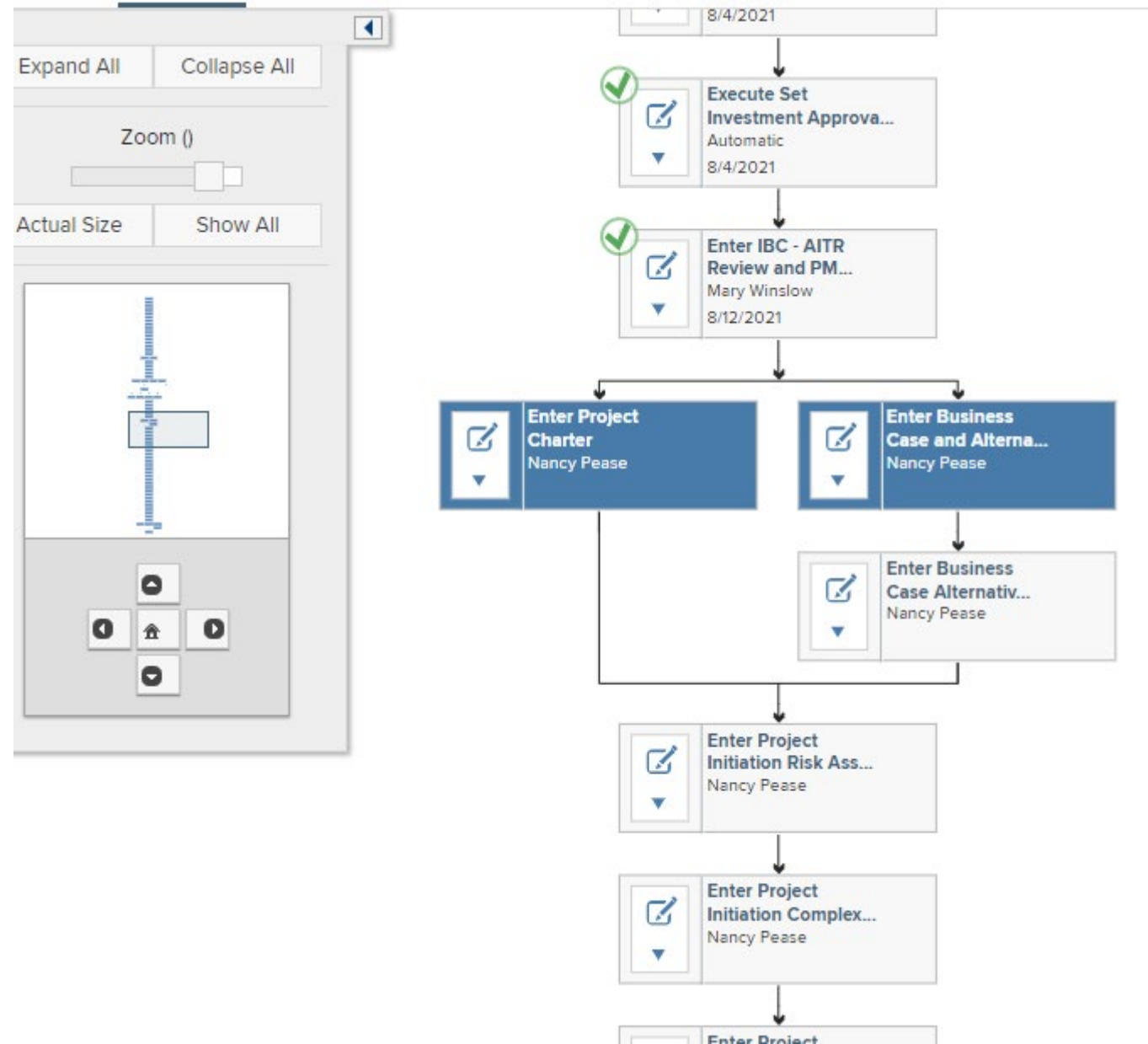
Scope

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.

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

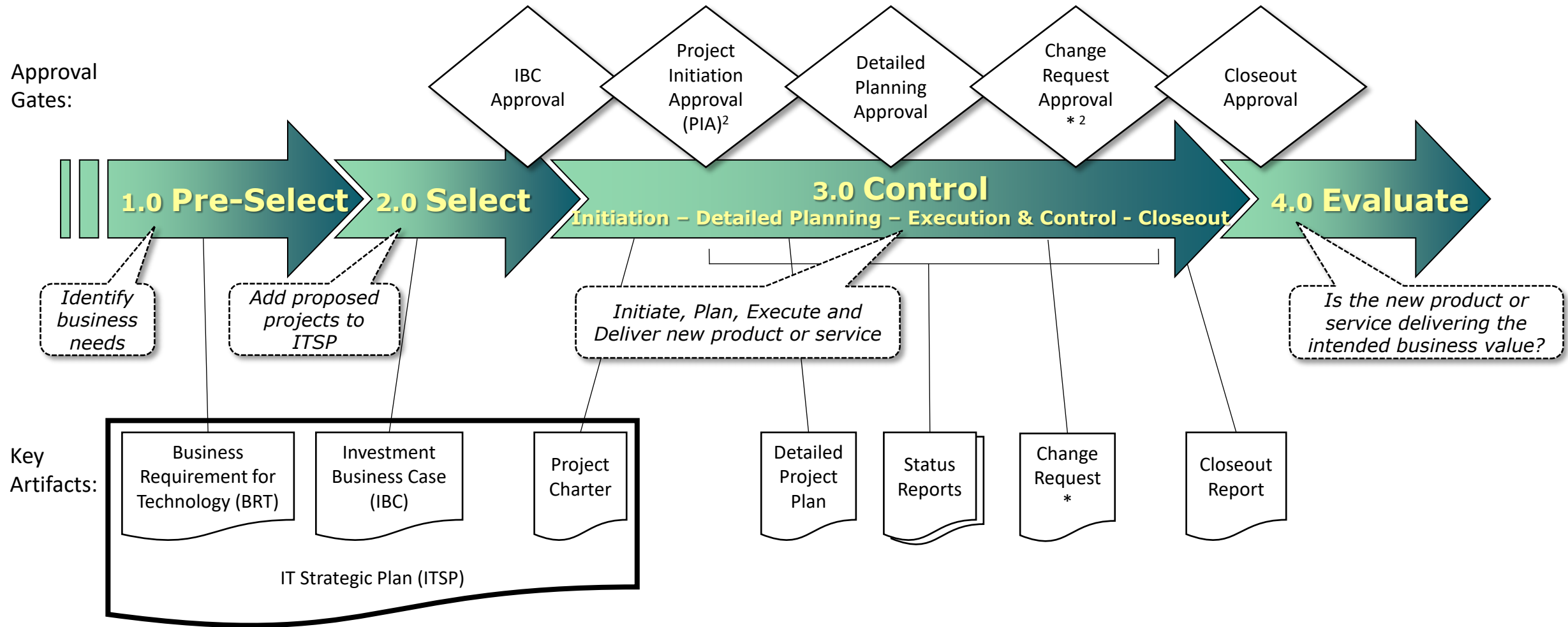
- Shows current steps in the item Lifecycle.
- Work View > Active Lifecycle Steps (tile)

The screenshot displays the Planview Portfolios interface. At the top, the 'Menu Work' and 'Work Class Project' dropdowns are highlighted with yellow circles. Below the navigation bar, the 'Work View' tab is selected and highlighted with a yellow circle. The main dashboard features several tiles: 'Work Detail', 'Active Lifecycle Steps' (highlighted with a yellow circle and showing a count of 1), 'In Progress Timesheets' (showing 0), 'Unprogressed Timesheets', and 'COVA Monthly Project Status'. Below the tiles, a table titled 'Active Lifecycle Steps' is visible, showing a single entry with a red status icon, the step 'Enter Scope', entity 'Class Project', type 'Work', and a refresh icon. The footer of the table indicates 'RPM Tile: T106 - Portfolio > Active Lifecycle Steps'.

| Status | Lifecycle Step | Entity | Type | View Lifecycle | User |
|--------|----------------|---------------|------|----------------|------|
| ! | Enter Scope | Class Project | Work | ↻ | Pat |

RPM Tile: T106 - Portfolio > Active Lifecycle Steps

IT Project Lifecycle: Key Approval Gates and Documentation



² Category 1-2 projects: SOC approval required

* Change Request if needed

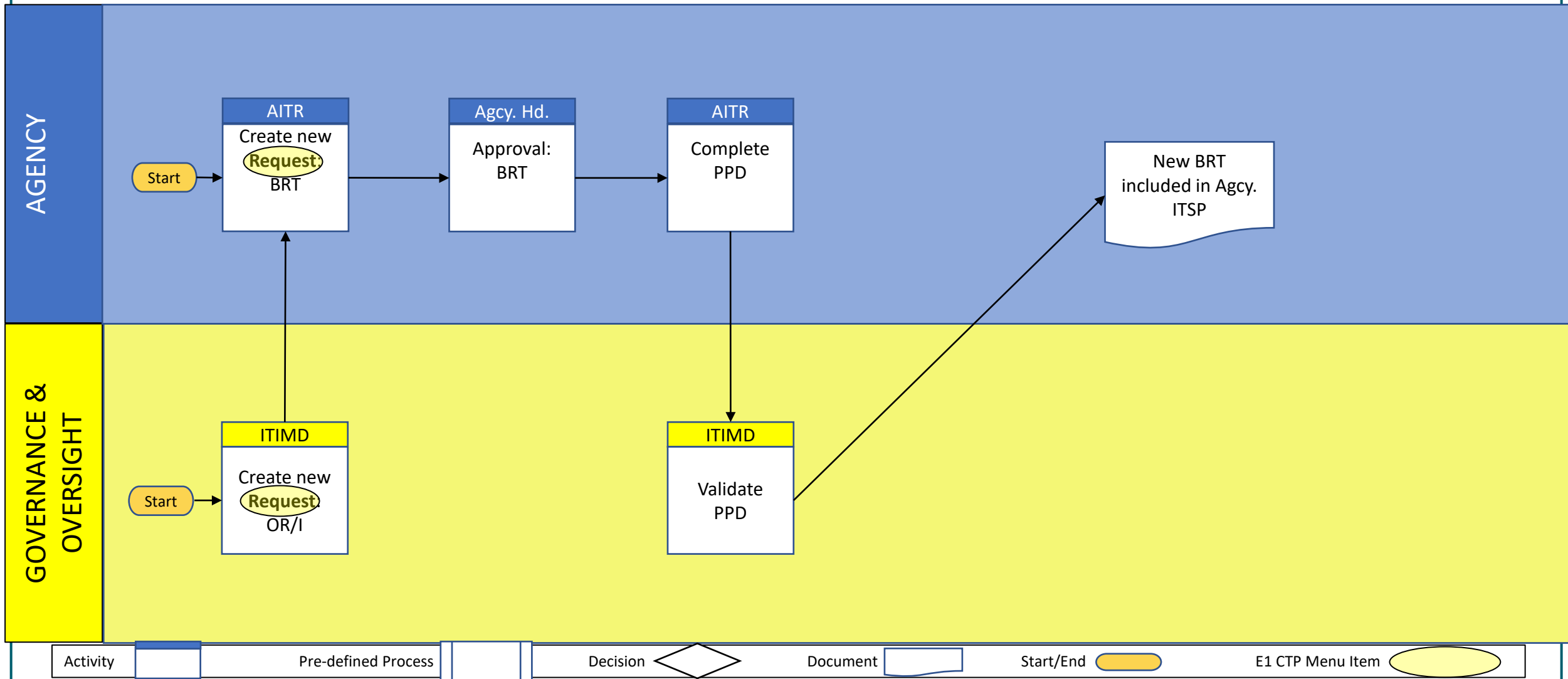
Key Approval Gates and Documentation reside in the Commonwealth Technology Portfolio (CTP)

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”**

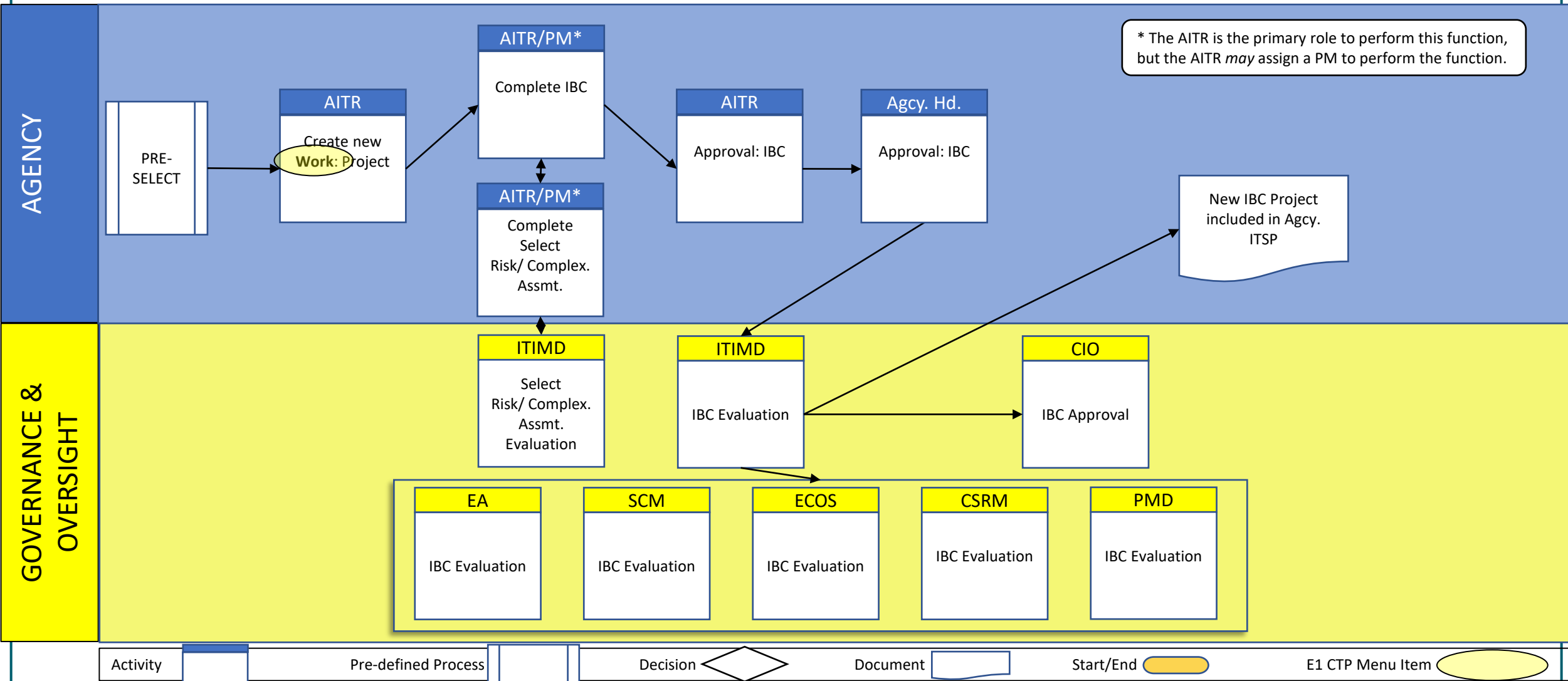
1.0 Pre-Select

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2.0 Select

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

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

▼ Agency Approvals




AITR

Training Admin



Agency Head

Training Admin



▼ Initial Cost Estimate

Find your Work Item

- Click on:
- Planview Portfolio
- Menu > Work
- Work > Student 01 Project
- ...or do a keyword search

The screenshot shows the Planview Work Class Project interface. The top navigation bar includes the Planview logo (circled in yellow), a 'Menu Work' dropdown (circled in yellow), and a 'Work Class Project' dropdown (circled in yellow). On the right, there is a 'New' button and a search bar (circled in yellow) with a magnifying glass icon and the text 'Search'. Below the navigation bar, the main content area is divided into sections. The '2.0 Select' section is highlighted in dark teal. Below it, the 'General Information' section is highlighted in light green. This section contains the following details:

- Planned Initiation Start Date:** 2/9/2022
- Planned Completion Date:** 2/24/2022
- AITR:** Training Admin

A dropdown menu is open from the 'Work Class Project' dropdown, showing a list of 'RECENTLY VIEWED PORTFOLIOS' and 'RECENTLY VIEWED WORK'. The 'Class Project' item under 'RECENTLY VIEWED WORK' is highlighted with a blue box and a yellow circle.

RECENTLY VIEWED PORTFOLIOS

- Training Portfolio (Shared)
- PR - DMAS Procurements
- Program Review-Monthly Category 1 - 2
- Program Review-Quarterly Category 1 - 3
- PR - DMAS projects: ALL
- See All Work Portfolios (19)

RECENTLY VIEWED WORK

- Class Project**
- Class Procurement
- Student 01 Project

Tabs

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- Typical Tab menu items:

Planview Portfolios | Menu Work > Work Class Project

Work View Plan Dependencies Financials Attribute History Lifecycle Changes Risks Issues Associated Strategies Associated Requests 2.0 Select 3.0 Control

Work Detail Active Lifecycle Steps In Progress Timesheets Unprogressed Timesheets COVA Monthly Project Status Agency Project Status Report Financial Analysis (WRK31) Financial Burndown Comparison

Active Lifecycle Steps

| Status | Lifecycle Step | Entity | Type | View Lifecycle | User Responsible | Lifecycle Role | Activated On | Rejected |
|--------|----------------|---------------|------|----------------|------------------|----------------|----------------------|----------|
| ! | Enter Scope | Class Project | Work | | Pat Reynolds | | 3/28/2024 2:05:35 PM | |

RPM Tile: T106 - Portfolio > Active Lifecycle Steps

COV Project Status Summary

IBC Approval Notification

Lessons Learned

PMD Billing Data

PMD Clear Data

PMD Configuration

Prepare for Closure

Project CIO Approval Status

Project Status Help

Sponsor Status Approval

VITA Approvals

Document Repository

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The screenshot shows the Planview Portfolios interface. The top navigation bar includes 'Planview Portfolios', a 'Menu Work' dropdown, and a 'Work Class Project' dropdown. Below this, a secondary navigation bar contains 'Work View', 'Plan', 'Dependencies', 'Staffing', and 'Financials'. The 'Work View' tab is active, and its dropdown menu is open, with the 'Documentation' option highlighted by a yellow circle. Other options in the dropdown include 'Export as PowerPoint Timeline'. Below the navigation bar, there is a section for 'Active Lifecycle Steps' with a table showing the status of various steps.

| Status | Lifecycle Step | Entity | Type |
|--------|----------------|---------------|------|
| | Enter Scope | Class Project | Work |

RPM Tile: T106 - Portfolio > Active Lifecycle Steps

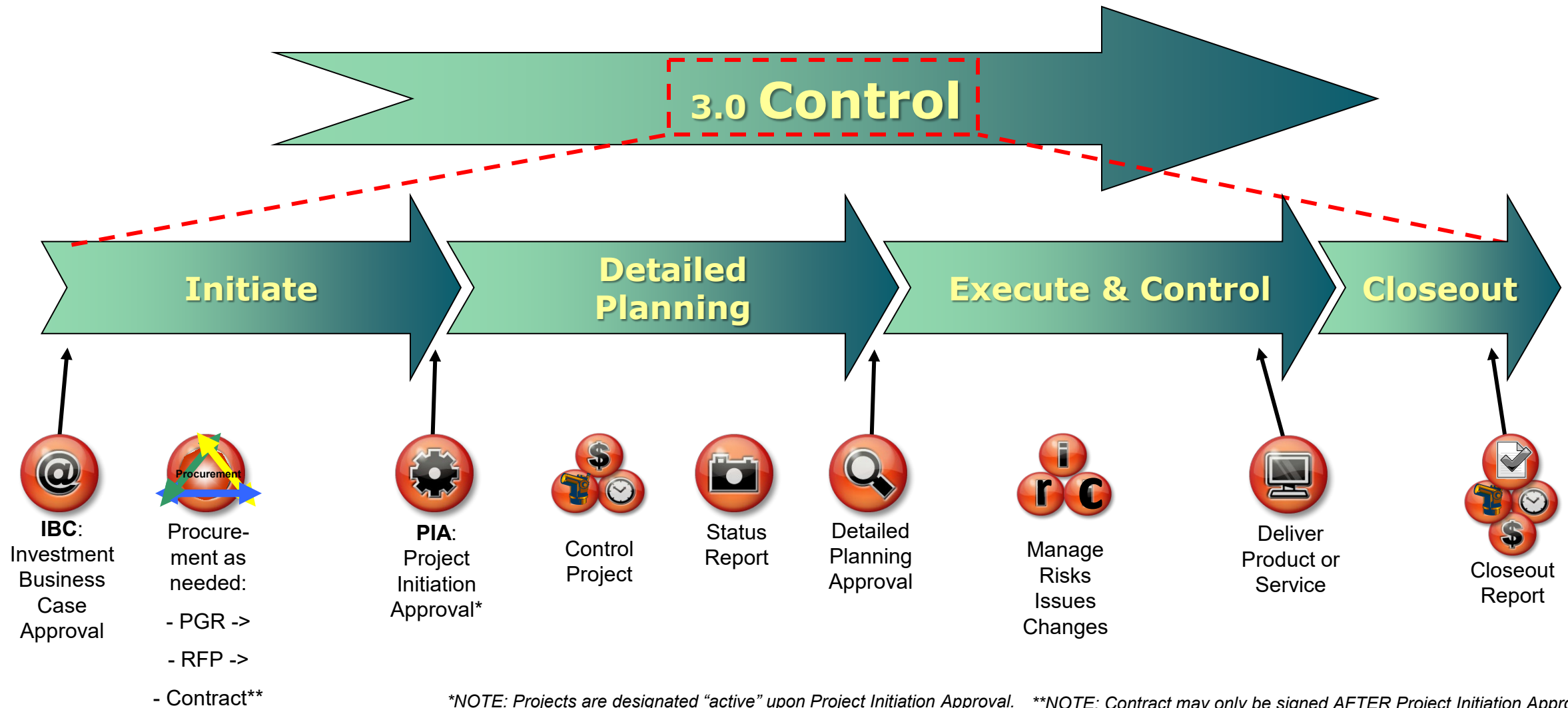
The screenshot shows the 'Review Content for Class Project' page. The page has a header 'Review Content for Class Project' and navigation links 'Top' and 'Parent'. Below this, there is a list of links: 'Global Documents', 'Document Templates', and 'Project: Class Project'. To the right of this list, there is a section with a yellow circle highlighting the 'Document URL' link. Below this, there is a table with a header 'Title' and a row with a checkmark and a link icon.

| Document URL |
|--------------|
| Title |

ITIM Lifecycle: 3.0 Control: Initiation

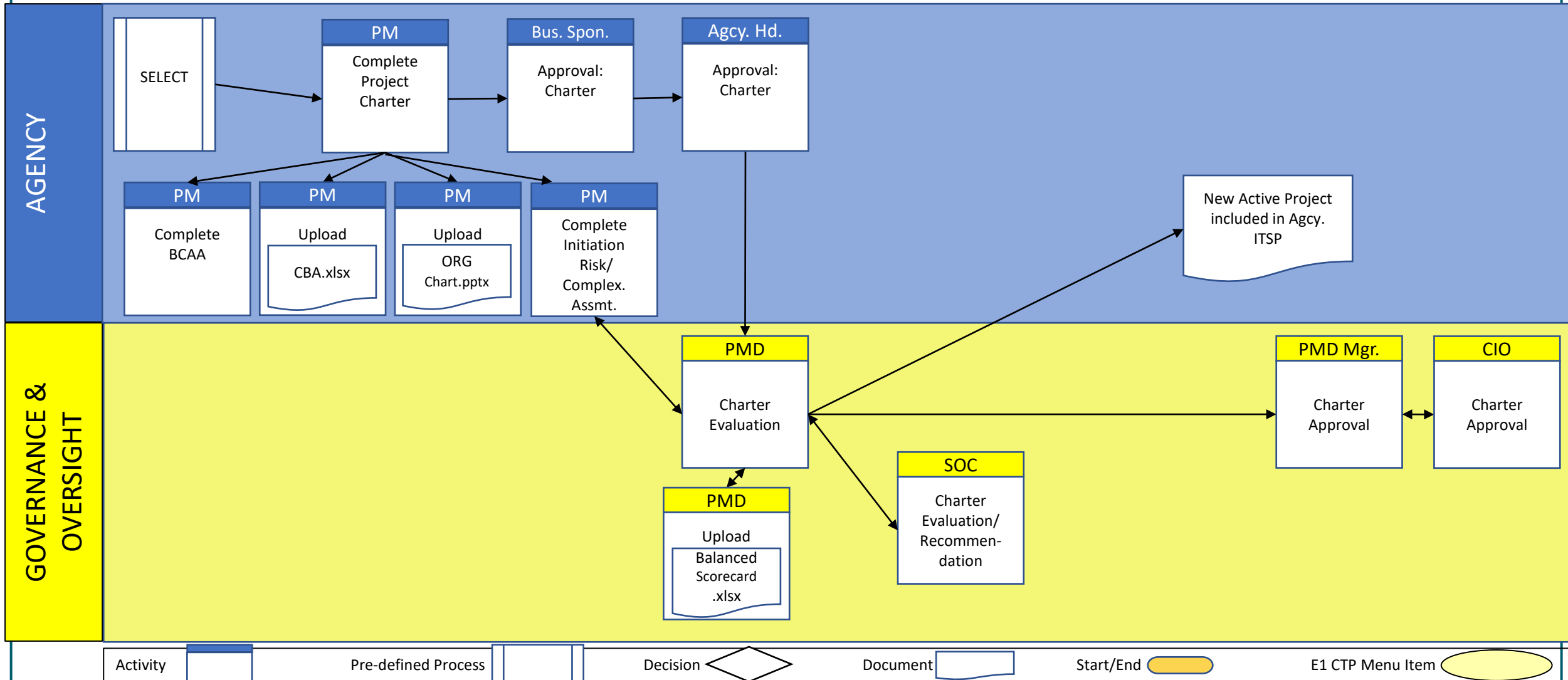
1. 3.0 Control: Initiation Phase: This is how we get to “Project Initiation Approval” (PIA)
2. Business Case & Alternatives Analysis (BCAA)
3. Cost-Benefit Analysis (CBA)
4. Project Charter
5. Plan (Schedule)
6. Financials
7. Student Exercise: Project Initiation: Build upon ‘Student 01’ Project...

CPM Methodology Within The ITIM Lifecycle



3.0 Control/Initiation (Project)

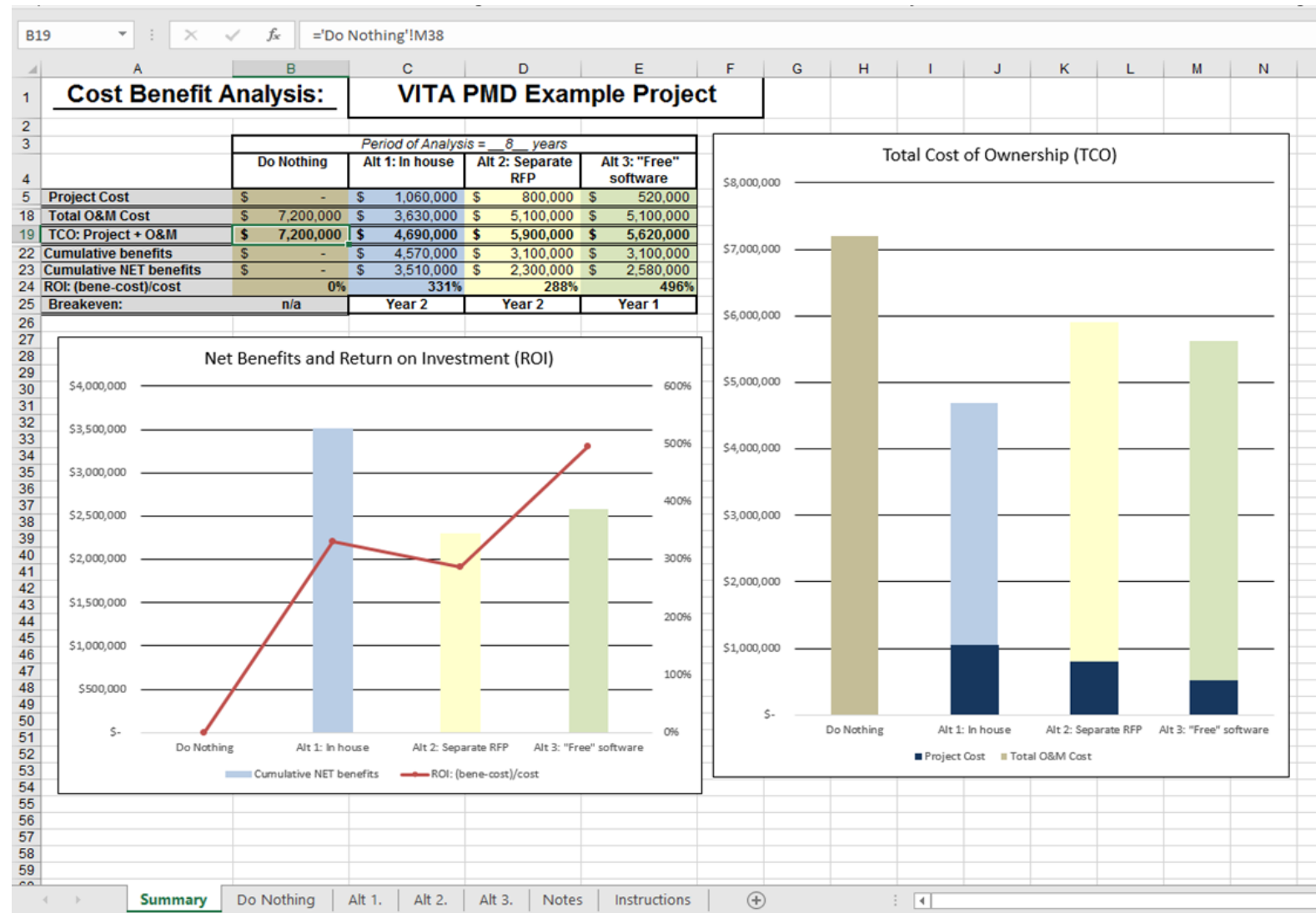
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Initiation: Differences by Project Category

| 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 |
| <i>Full-Time Project Manager</i> | 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 |
| <i>Internal Agency Oversight Committee? (IAOC)</i> | Required, with PMD | Required, with PMD | Required, with PMD | None; Agcy. PM Team only |
| <i>(PMD): Balanced Scorecard</i> | Required, delphi | Required, delphi | Required, delphi | Not required |
| <i>Project Initiation Approval Path:</i> | Sponsor > Agcy Hd > SOC > PMD > CIO | Sponsor > Agcy Hd > SOC > PMD > CIO | Sponsor > Agcy Hd > PMD > CIO | Sponsor > Agcy Hd |

Cost-Benefit Analysis (CBA)

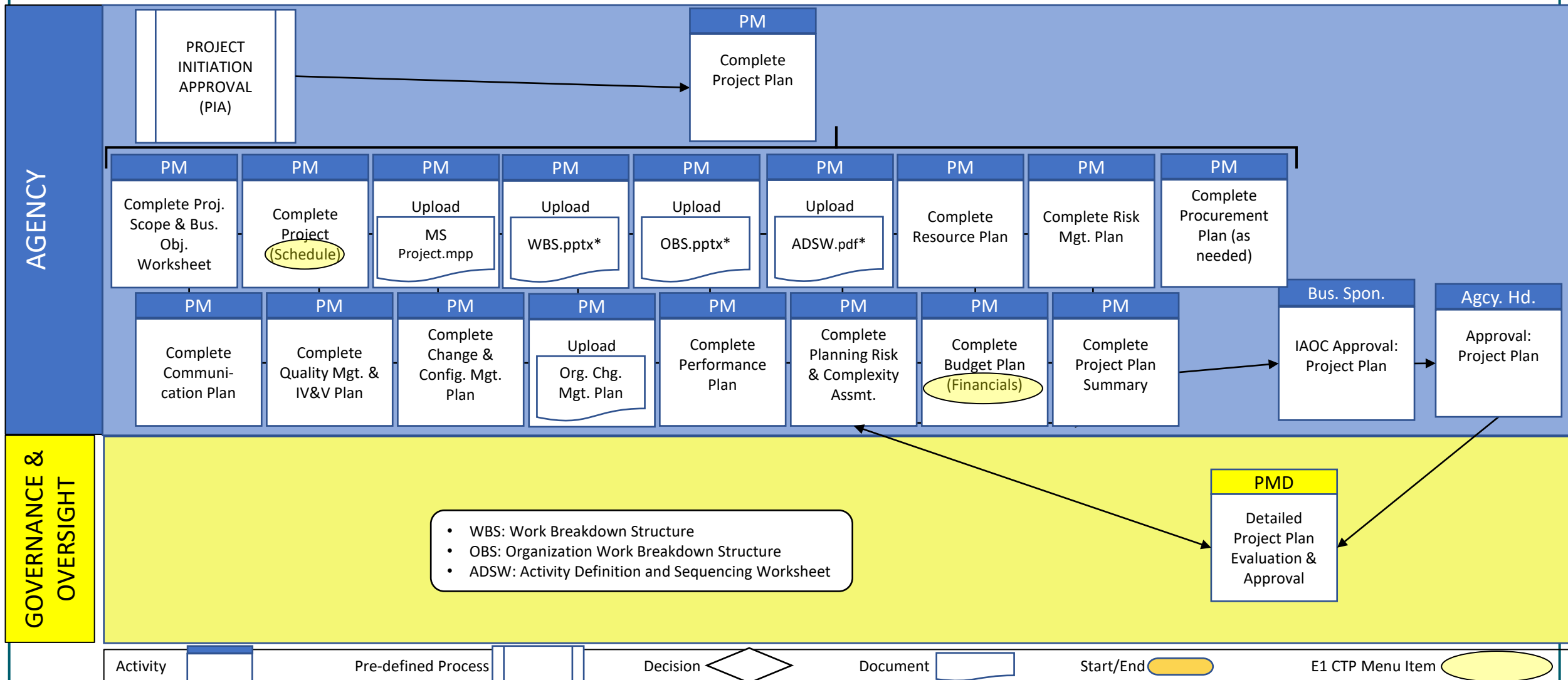


ITIM Lifecycle: 3.0 Control: Detailed Planning

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)

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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: "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)

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| 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 |
| <i>Organization Change Management Plan</i> | 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

- Reveal / Hide Columns

The screenshot shows a project schedule table with columns: Line #, Name, Work Status, and Schedule Start. A right-click context menu is open over the 'Work Status' column, showing options to select or deselect columns. The 'Work Status' column is circled in yellow, and the context menu is also circled in yellow. A red box labeled 'Right Click' points to the context menu, and another red box labeled 'Select Columns' points to the 'Work Status' option in the menu.

| Line # | Name | Work Status | Schedule Start |
|--------|----------------------------------|-------------|----------------|
| 1 | Project: Class Example - Project | Requested | |
| 2 | >: Kickoff | Requested | |

Right Click

Select Columns

Work Status

Schedule Start

Line #

Name

Work Status

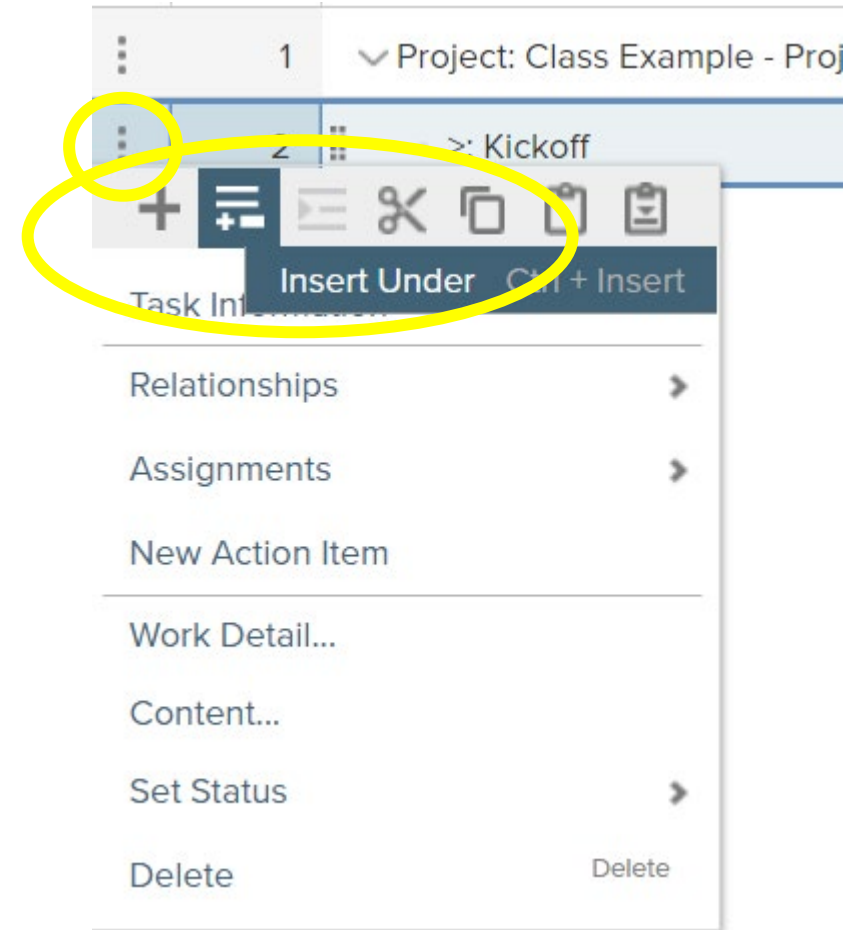
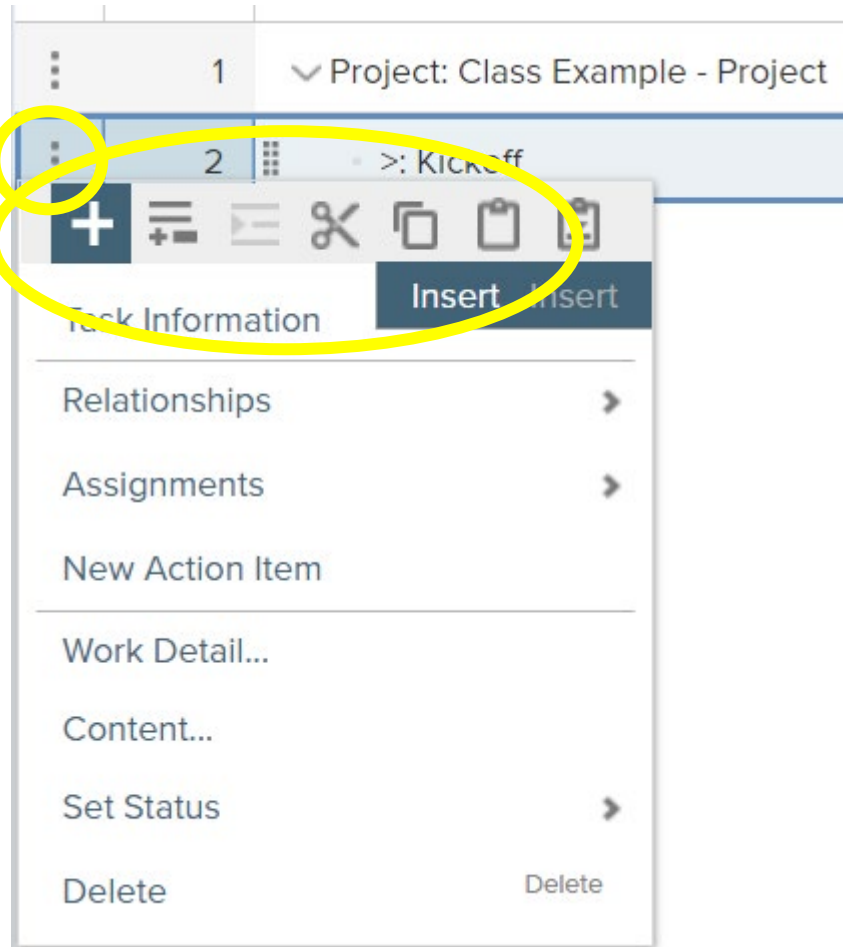
Schedule Start

Duration

Schedule Finish



Plan

- Tasks: Insert, Insert Under



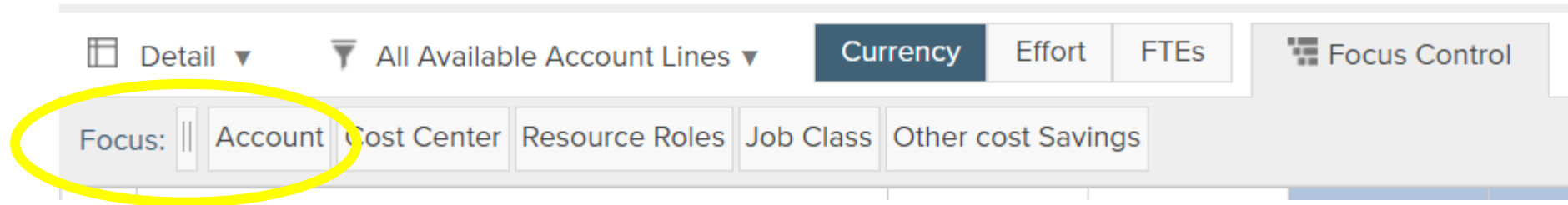
Financials

- Clean up your view: Focus Control

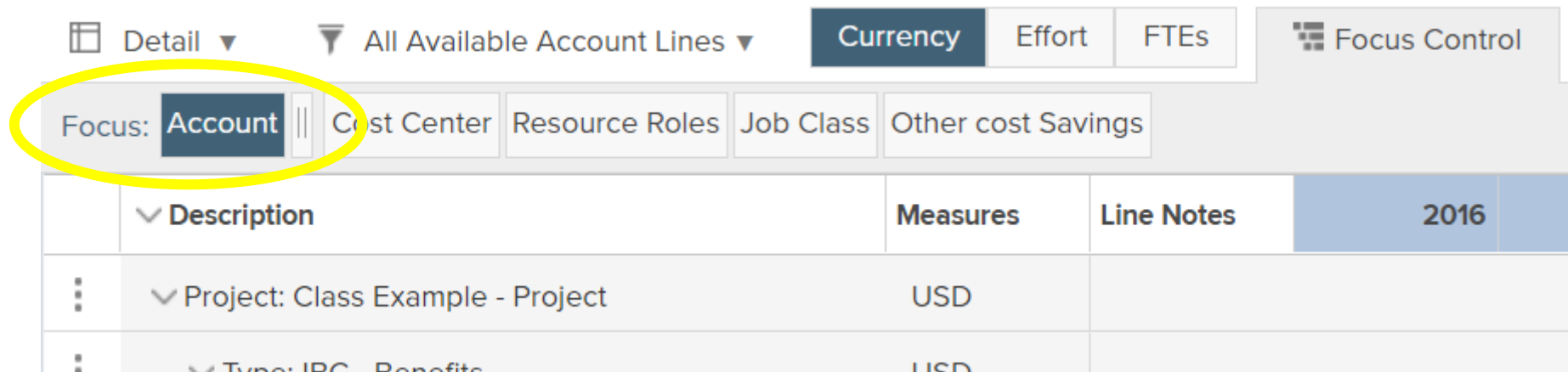
| Project Class Example - Project | | View Financial Planning Detail | | | | | | | | |
|--|---|-----------------------------------|------------|------|---------------|------|------------|------|---------------------------|-----|
|  Detail ▼ |  All Available Account Lines ▼ | Currency | Effort | FTEs | 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 ▼

2018 2019 2020 2021 2022 2023 2024 2025

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

Financials

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

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

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
☐ Actual/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...

| es | Line Notes | 2022 | 2023 | Total |
|----|------------|--------|------|-------|
| | | Expand | | |

- To this...

| Q1 2022 | Q2 2022 | Q3 2022 | Q4 2022 | 2022 | 2023 |
|---------|---------|---------|---------|------|------|
| | | | Expand | | |

- To this...

| | | | | | | | | |
|-----|------------|---------|----------|----------|----------|------------|----------|--|
| rol | Add a Line | | | | | Enter text | Collapse | |
| | Q2 2022 | Q3 2022 | Apr 2022 | May 2022 | Jun 2022 | Q4 2022 | 2022 | |
| | | | | | | | | |

Financials

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- Project Budget

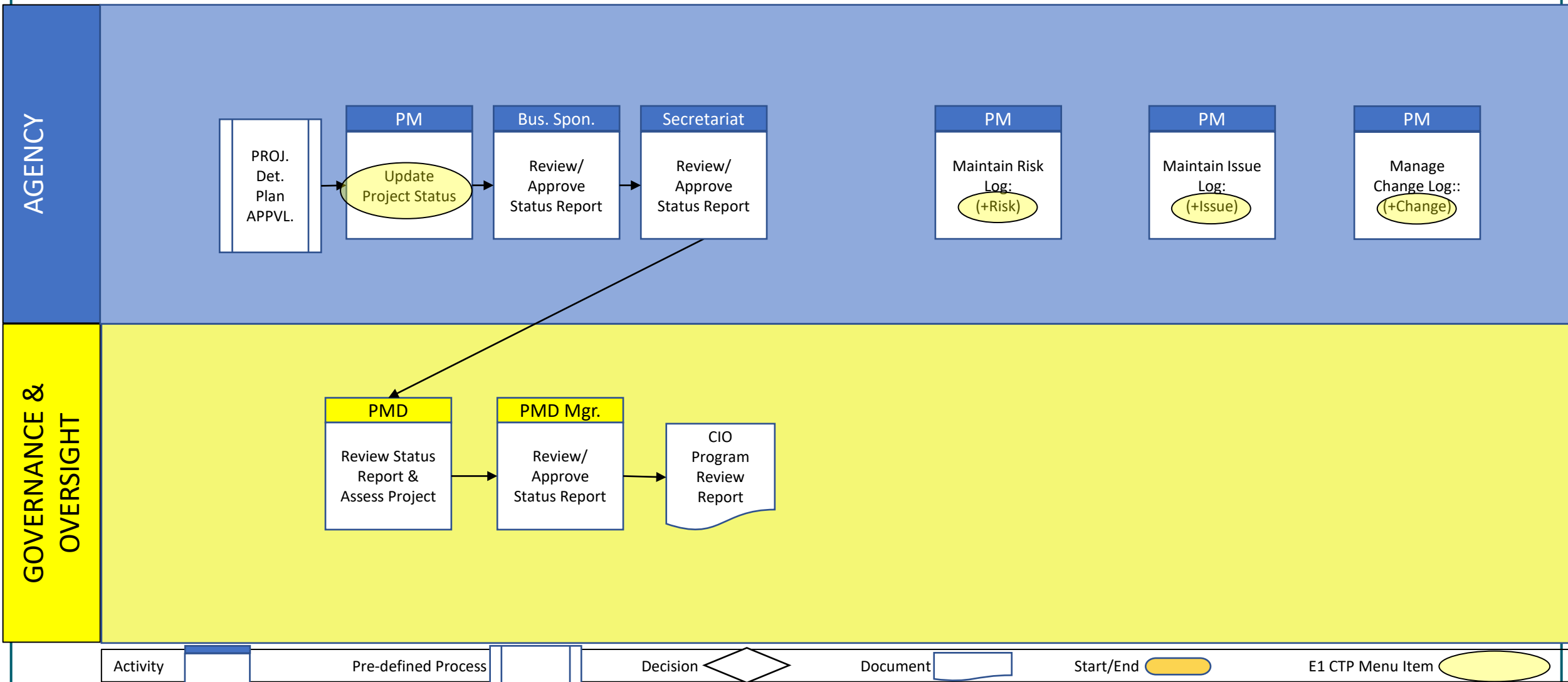
| | | | | |
|-----------------------------|-----|------------|------------|------------|
| ▼ Type: Budget Plan - Costs | USD | 358,023.00 | 222,344.00 | 580,367.00 |
| > Internal Staff Labor | USD | 123,456.00 | 78,900.00 | 202,356.00 |
| > Services | USD | 234,567.00 | 123,444.00 | 358,011.00 |
| > 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)

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Execute & Control, Closeout: Differences by Project Category

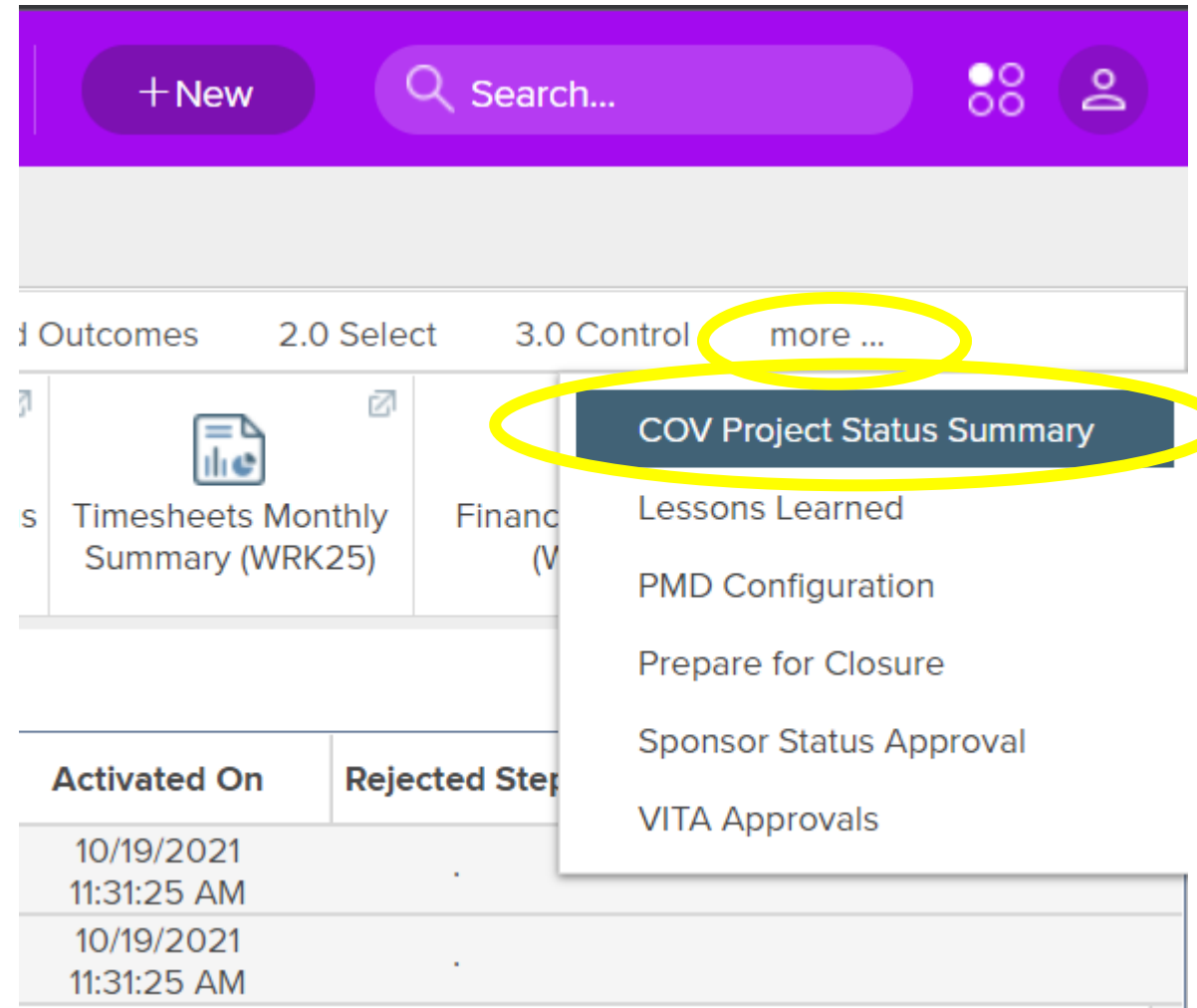
| REQUIREMENT | CATEGORY 1 | CATEGORY 2 | CATEGORY 3 | CATEGORY 4 |
|---|--|--|--|--|
| In-Progress IV&V; to coincide with project phases | Required within 6 mo. of Planning Approval... | ...then annual if project > 12 mo. duration. | Optional | None |
| Risk Log | Required | Required | Required | Optional |
| 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 \leq 24 mo. duration | +20%, or 4 mo., if project is \leq 24 mo. duration | +25%, or 4 mo., if project is \leq 24 mo. duration | +35%, or 4 mo., if project is \leq 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

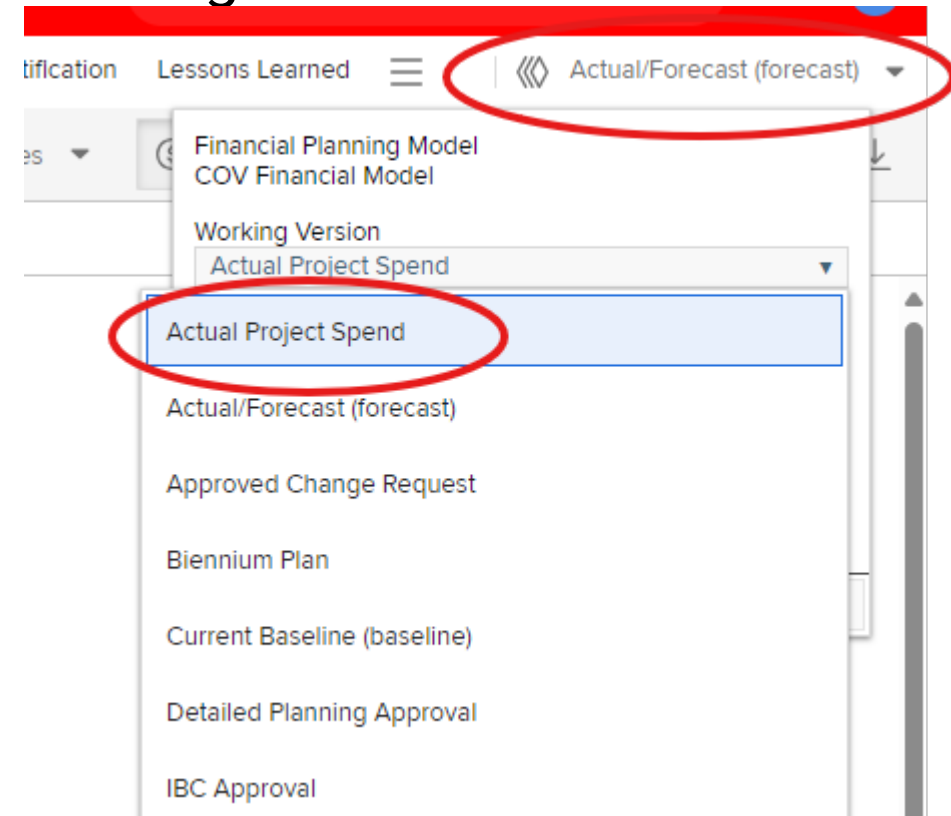
Update fields on the Form:

- 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.



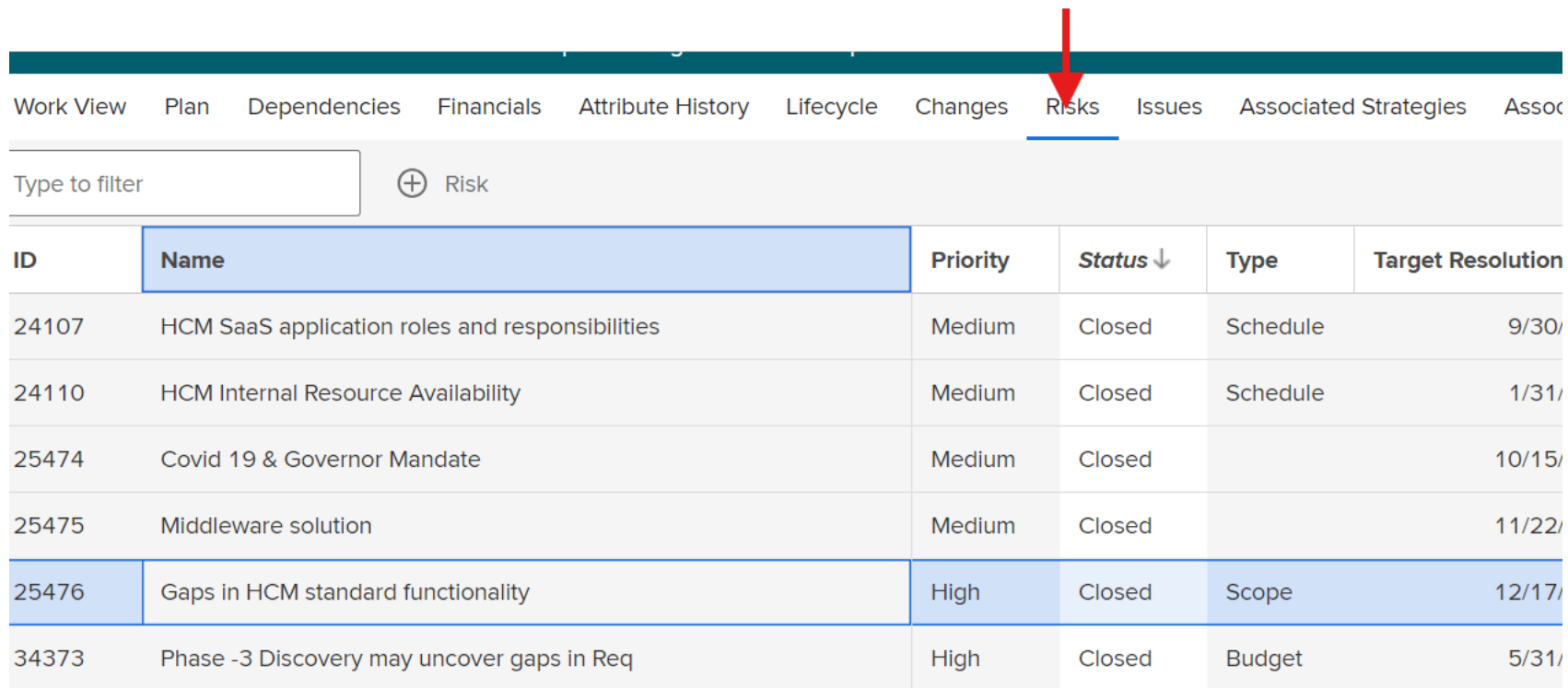
Project Status: Financials

- 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 | | | | | | | | | | | |
| 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: Top Five Risks

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



| 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 Commonwealth Level 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

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Project Class Example - Project view Work View

Overview Lifecycle Notifications Work Effort **Changes** Risks Issues

+ Change

| ID | Name | Priority | Status |
|----|------|----------|--------|
|----|------|----------|--------|

New Change - Planview Enterprise One - Portfolio and Resource Management - Google Chrome

covactp-sb.pvcloud.com/testing/CRI/AddEditCri.aspx?ct=C&pt=PROJECT&el=

New Change

Basic Info

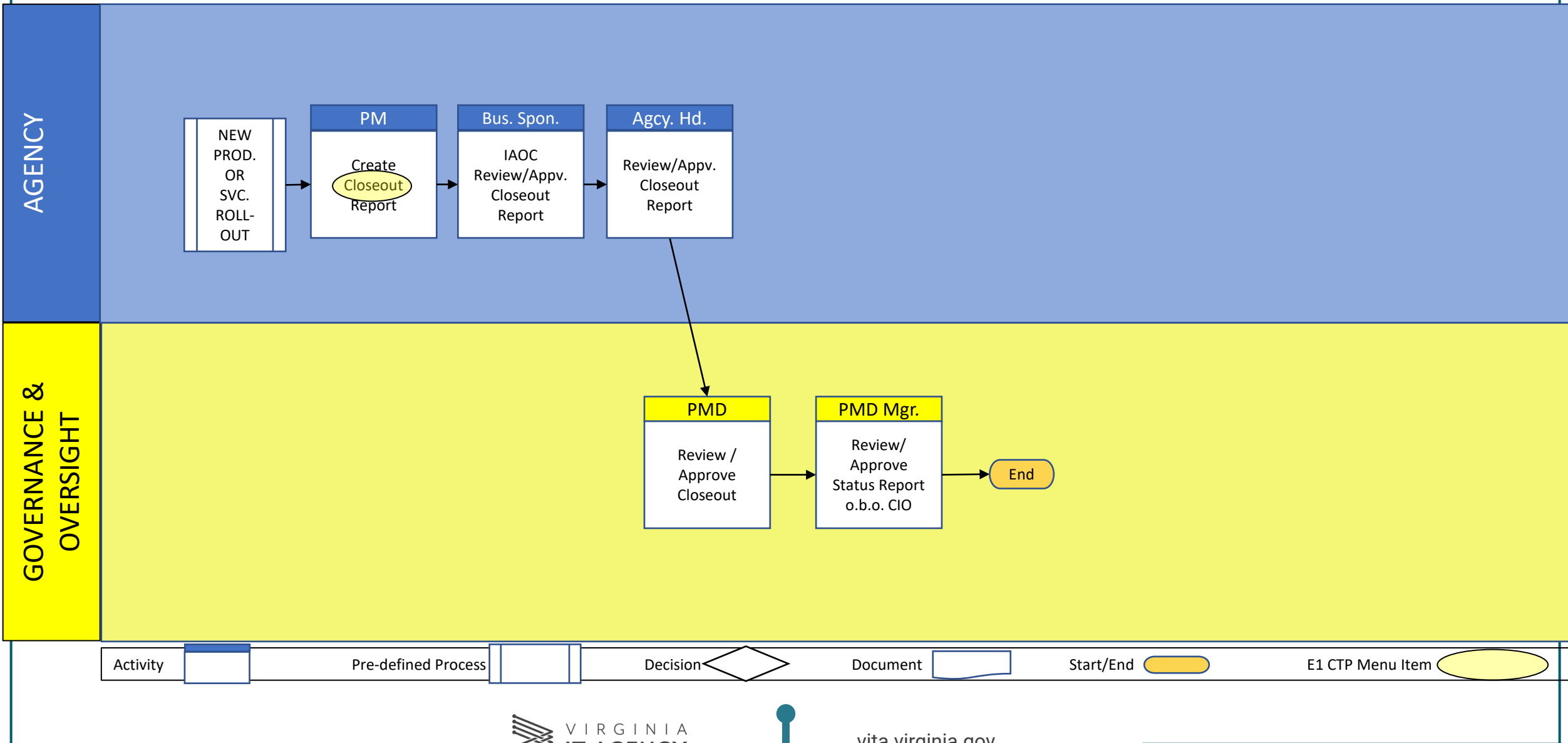
| | |
|-------------|-------------------------|
| Work Item | Class Example - Project |
| Name | |
| ID | C-25667 |
| Status | Open |
| Priority | Medium |
| Description | |

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)

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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 (\geq \$250,000)

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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: (\geq \$1M) VITA SME review, CIO approval
 4. Contract: (\geq \$1M) OAG review, VITA SME review, CIO approval
 5. SOW: (\geq \$1M) VITA SME review, CIO approval

The Process takes time!
Plan Accordingly!



Select + Control (Procurement Governance)

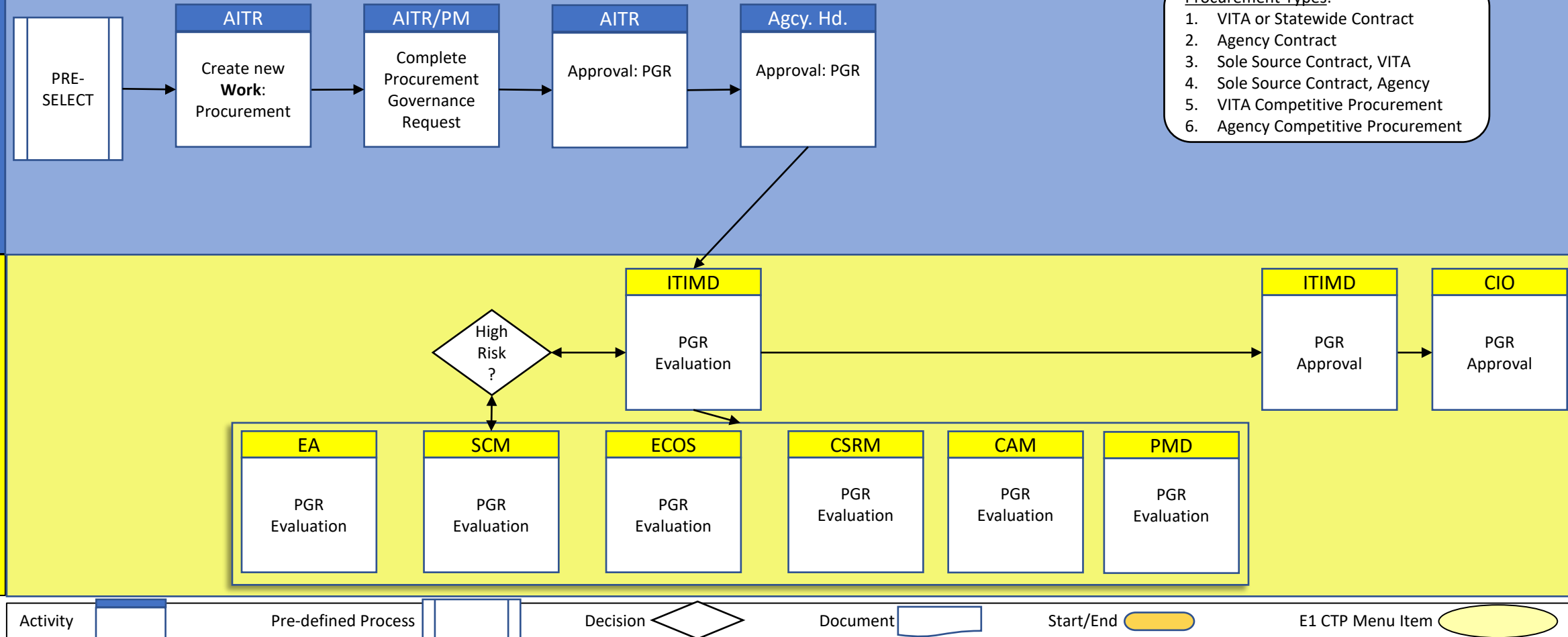
63

AGENCY

GOVERNANCE &
OVERSIGHT

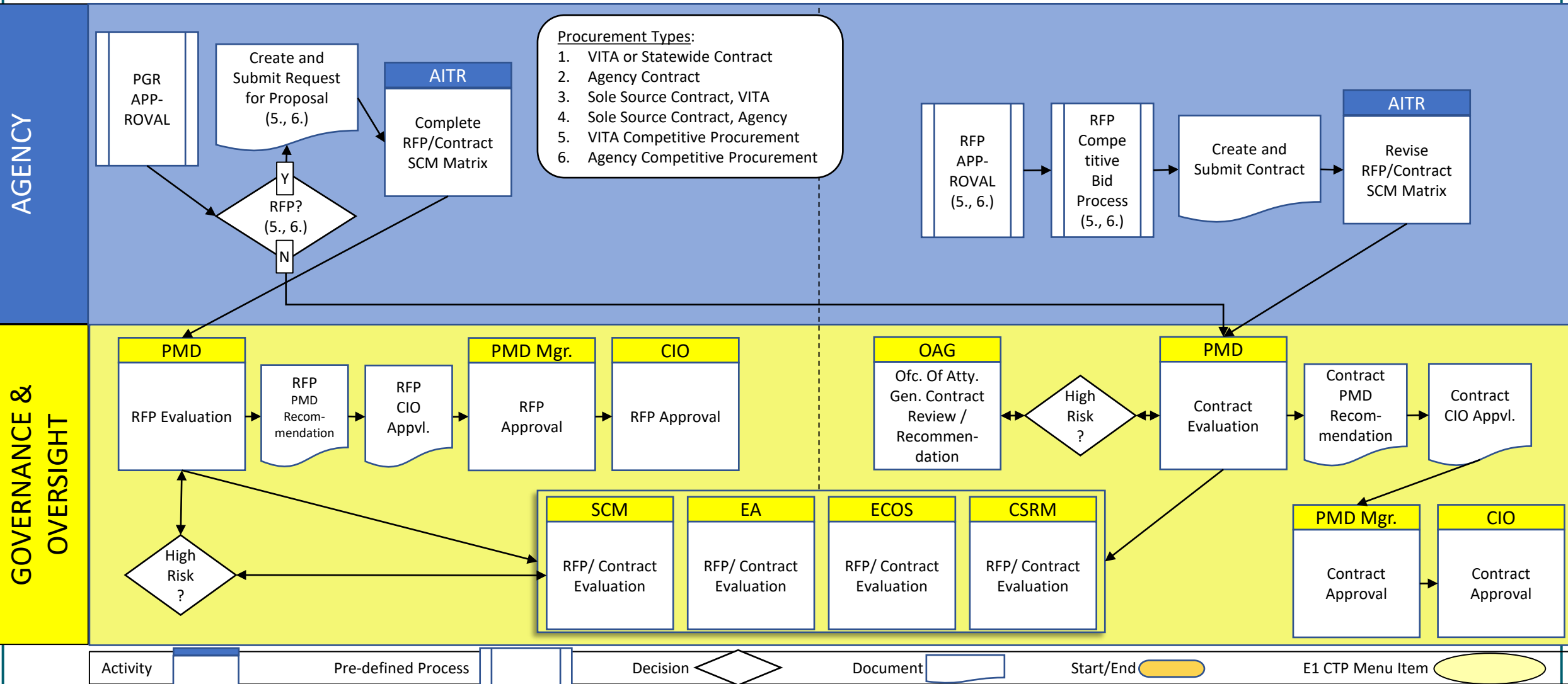
Procurement Types:

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



Control/Initiation (RFP/Contract Governance)

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Wrap-up

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1. Help resources
2. Scenarios
3. Next Steps

Single Sign-on (SSO)

- Use Chrome or Edge browser - - not IE!

