Application Lifecycle and Projects System (ALPS)
Agency User Manual

Updated: April 21, 2014

Revision History

Date	Description	Author
6/21/13	• Created document.	Vicki Craig
01/2014	• Updated ALPS Title throughout • Updated Project-Application Association section to reflect interim modifications • General corrections	Michelle S. Walton
02/2014	• Made changes relevant to rewritten functionality: o Application Resource Plan (APR) o Project Planned Value (PPV)	Michelle S. Walton
03/2014	• Completed APR and PPV updates • Updated DAS Logo	Michelle S. Walton
04/2014	• Added documentation of newly released ALPS feature: Application to Application Associations • Updated Agency Review section to include alternate to email	Michelle S. Walton

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Understanding IT ALPS

Historically, an agency's IT Plan was reviewed and approved by OIT's Strategy & Investment Management (SIM) group as part of a biennium budget planning exercise. Over the years, IT planning data has been captured in various systems.

Moving forward, OIT SIM wants to support your agency's business needs through the creation of an IT Business Plan. The IT Business Plan, driven out of the agency's IT Portfolio, will be tied directly to supporting the agency's business needs and assisting in fiscally sound technology decisions.

To accomplish this goal, OIT has developed IT ALPS, the Information Technology Applications Lifecycle Planning System. IT ALPS is a critical part of a large enterprise change in how we will look at IT planning and procurement. As an enterprise we are focusing on long-term planning in support of the agency's business plan. IT ALPS is a tool that will help us to make this change in focus.

With IT ALPS, each agency will be able to forecast their IT needs for years to come. In IT ALPS, an agency's IT Portfolio contains the agency's applications and the application's supporting projects. The IT Portfolio is a living and breathing portfolio that changes with the business. This is not a biennium budgeting exercise that gets tucked on the shelf.

IT ALPS provides the following advantages/benefits:

- Creates a comprehensive IT business plan based on the Agency portfolio which contains an Agency's applications and supporting projects.
- Changes with the Agency's business—the portfolio is a living and breathing IT investment inventory—no longer a biennium based budgeting exercise.
- Assists the agencies in incorporating their IT Investment Plans into their future OBM biennium budget proposals.
- Promotes decisions being made based on Agency mission, goals and constraints.
- Accelerates the Release & Permit (R&P) process.

The realization of the benefits of IT ALPS lays with the agency users. The detail and accuracy of the information and data you enter correlates directly to the level of benefit your agency receives. The more accurate, more detailed and complete the information entered into IT ALPS is the more benefits your agency will receive. With thorough vetting of IT projects in IT ALPS, agencies should see expedited procurements, as planned expenditures will be understood and anticipated earlier in the procurement process.

Understanding the Agency User and Agency Approver Roles

Within IT ALPS, agencies can request to have individuals setup as Agency Users or Agency Approvers.

As Agency Users, users will have the ability to enter agency information, application information, and project information.

As Agency Approvers, users will have the ability to perform all the same functions as the Agency User with the added ability to promote applications to production and to submit projects for enterprise review. Agency Approvers will have the ability to promote any application or project waiting for approval in the agency portfolio.

Agencies can determine which permissions they would like their users to have. You can email state.itplanning.manager@oit.ohio.gov. to have your permission level verified or to request a change.

Accessing the IT Application Lifecycle Planning System (IT ALPS)

IT ALPS is a web-based application. OIT's Strategy & Investment Management (SIM) team administers IT ALPS and maintains the list of users who have permission to access the application.

The IT ALPS application uses the features and benefits of Microsoft Active Directory (AD). AD administers the security rights, and authenticates the user and their computer in the background.

If your agency does not use Department of Administrative Services (DAS) Active Directory service, you may require a separate user ID and password to access IT ALPS.

Requesting Access

SIM worked with agencies to create the initial base group of users to be granted access to IT ALPS. As staffing changes occur, should you need to request access to the application, contact the IT ALPS administrator at the following email address: state.itplanning.manager@oit.ohio.gov. Your request must include the following information:

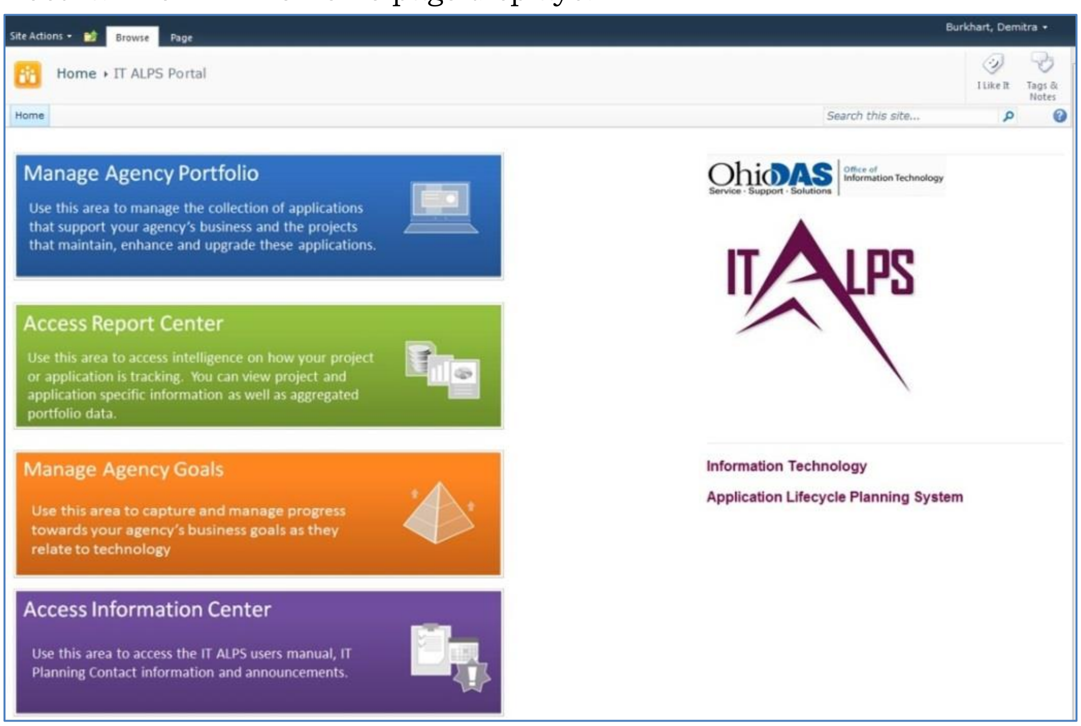
- Name
- Agency
- Email address
- Phone number
- Role (Agency User or Agency Approver)

If you are unsure of your status or if your agency does not use the AD directory service, contact the IT ALPS administrator at the following email address: state.itplanning.manager@oit.ohio.gov.

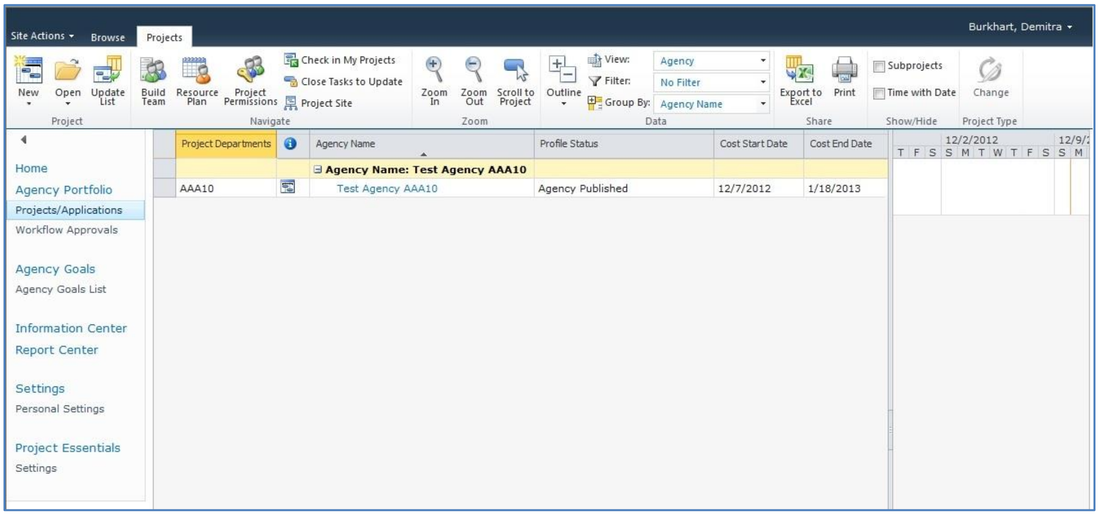
Accessing IT ALPS

Follow the steps below to access IT ALPS:

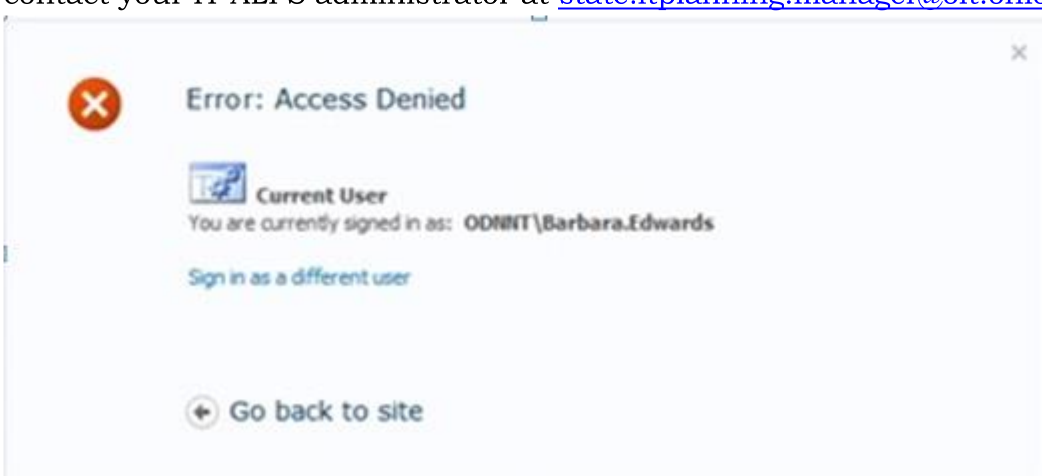
1. From the desktop, open an Internet web browser.
2. Navigate to the URL: https://IT ALPS.sp.ohio.gov/SitePages/IT ALPS%20Portal.aspx.
   Result: The IT ALPS home page displays.



3. Click **Manage Agency Portfolio**.
   Result: The system displays the agency work center. This verifies that you have successfully accessed IT ALPS. You can move to the section *Navigating IT ALPS* for information on how to navigate the IT ALPS application.

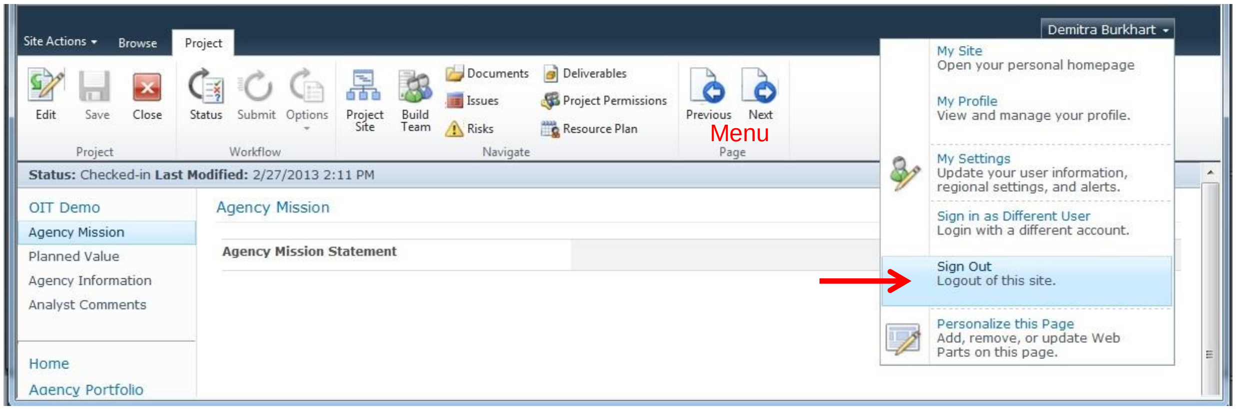


Note: If the agency work center did not display and instead you received an error message similar to the one shown below when attempting to access IT ALPS, contact your IT ALPS administrator at state.itplanning.manager@oit.ohio.gov.

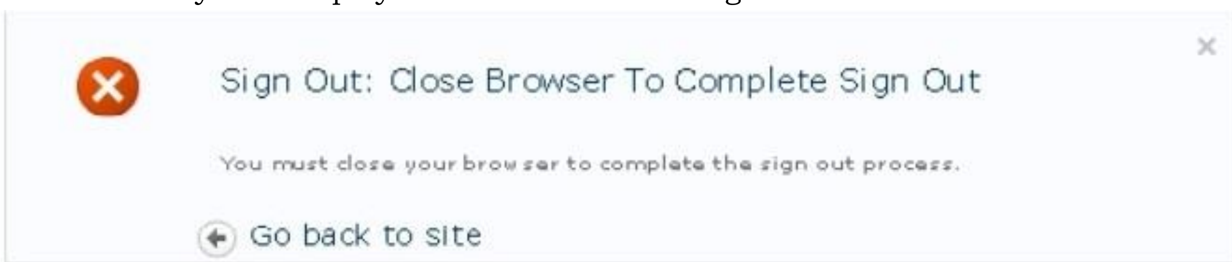


Exiting ALPS

1. Select the arrow icon displayed beside your name, and select **Sign Out** from the drop-down list.



Result: The system displays a confirmation message.



2. Close the web browser.

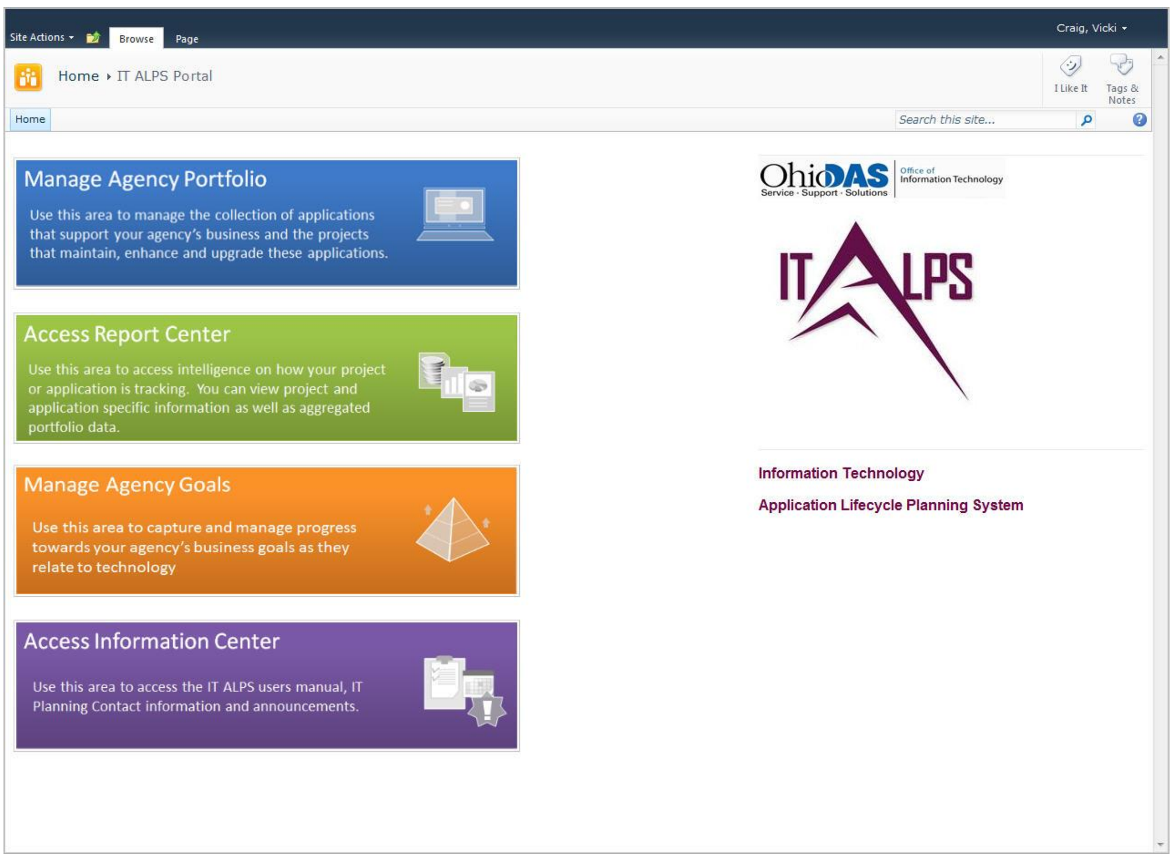
Navigating IT ALPS

IT ALPS is a Microsoft (MS) application that is based on MS SharePoint and MS Project. Therefore, some of the navigation and functionality will seem familiar if you have used those programs.

To navigate through IT ALPS, you will need to have an understanding of the various areas within the application and the terminology used to describe various screen elements. This section walks you through common navigation elements within IT ALPS.

Navigating the Home Page

The following shows the IT ALPS home page, which is displayed when you initially access the application and whenever you click on the Home link within IT ALPS.



The home page contains four areas:

- **Manage Agency Portfolio**—this area contains the agency's applications and projects along with the agency background information such as the agency's mission and planned value.

- **Access Report Center**—this area enables you to access reports on your agency's application and project information.

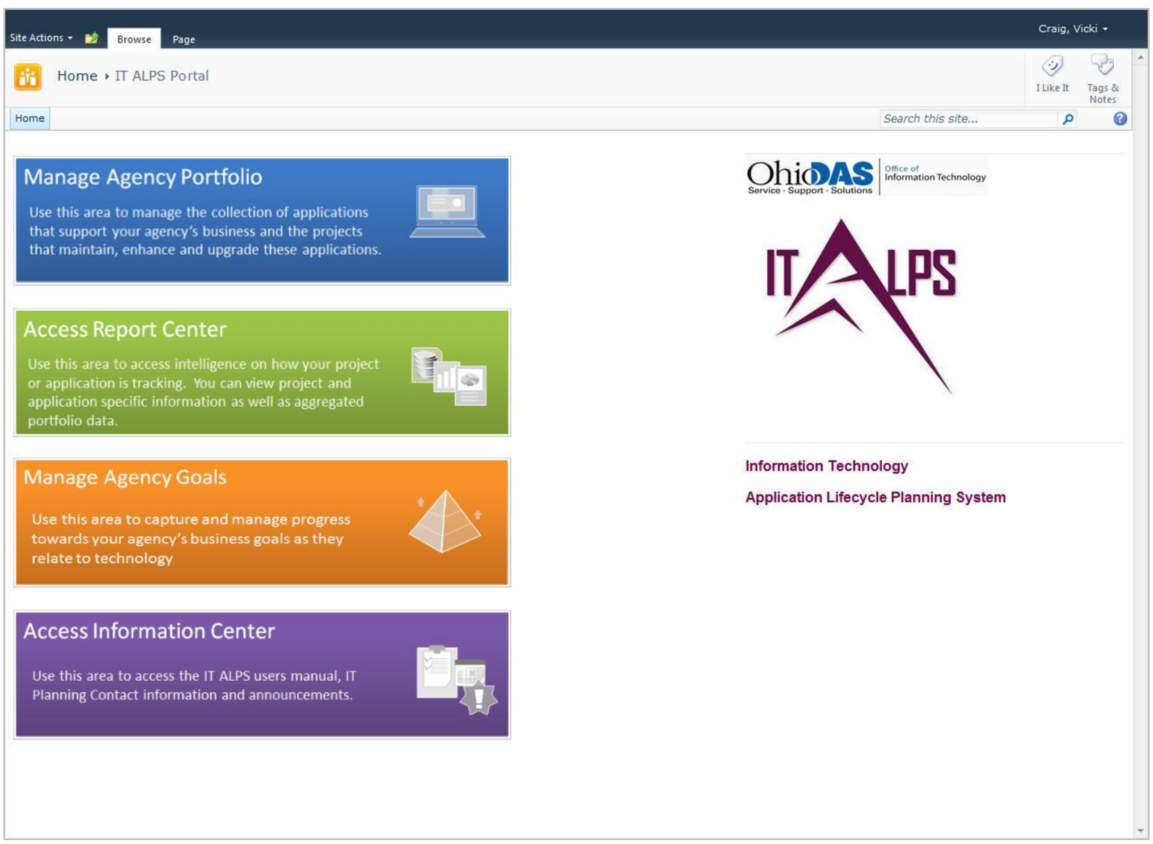
- **Manage Agency Goals**—this area enables you to capture and manage progress towards your agency's business goals as they relate to information technology. *Note:* This feature has not been released for agency use at this time. It will be available in a future release and will be discussed at that time.

- **Access Information Center**—this area provides access to the IT ALPS user information, IT Planning contact information and announcements.

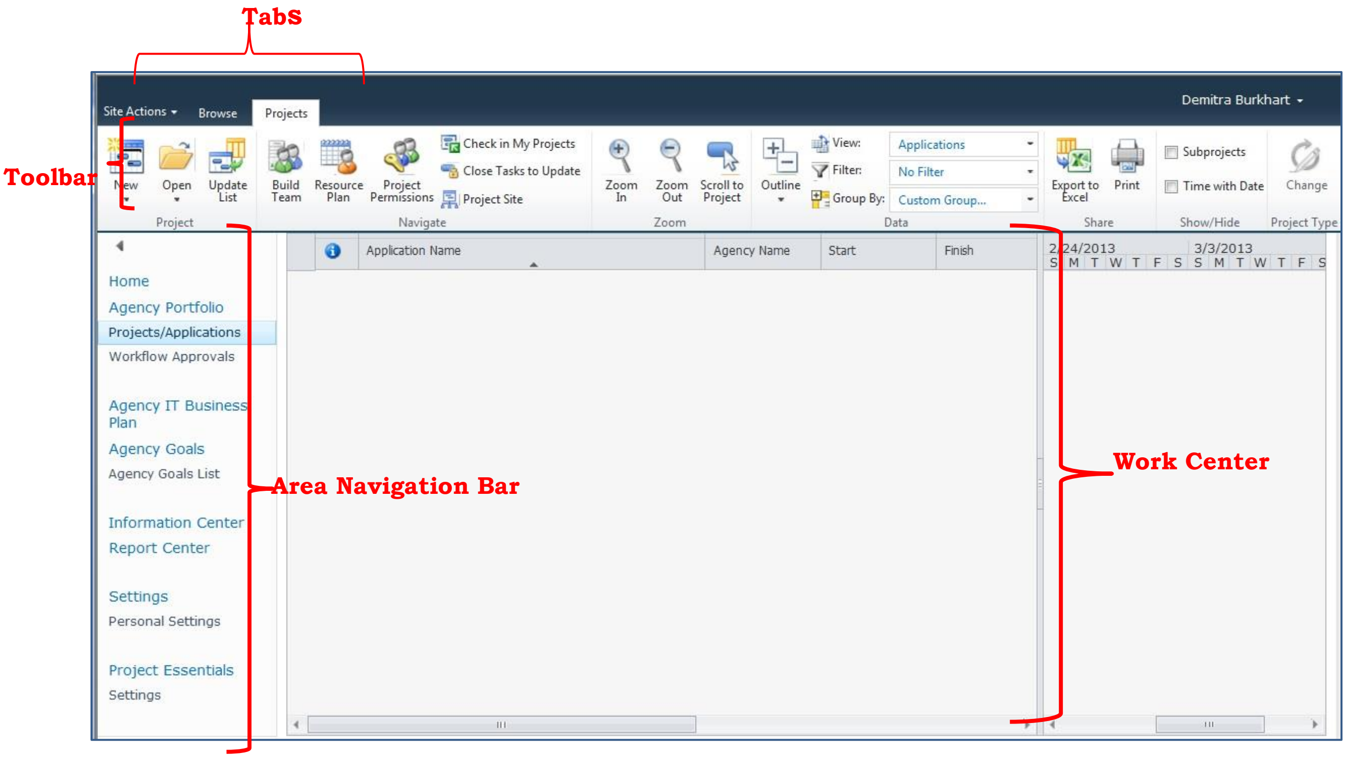
Navigating the Agency Portfolio Area

The Agency Portfolio is the area where you can manage your agency's portfolio of applications and projects, as well as record your agency's mission and IT planned value (IT budget).

To access the Agency Portfolio area, on the Home page, click on **Manage Agency Portfolio**.



Result: The Agency Portfolio area displays the work center page. The work center page below shows common screen elements and terminology used for them.



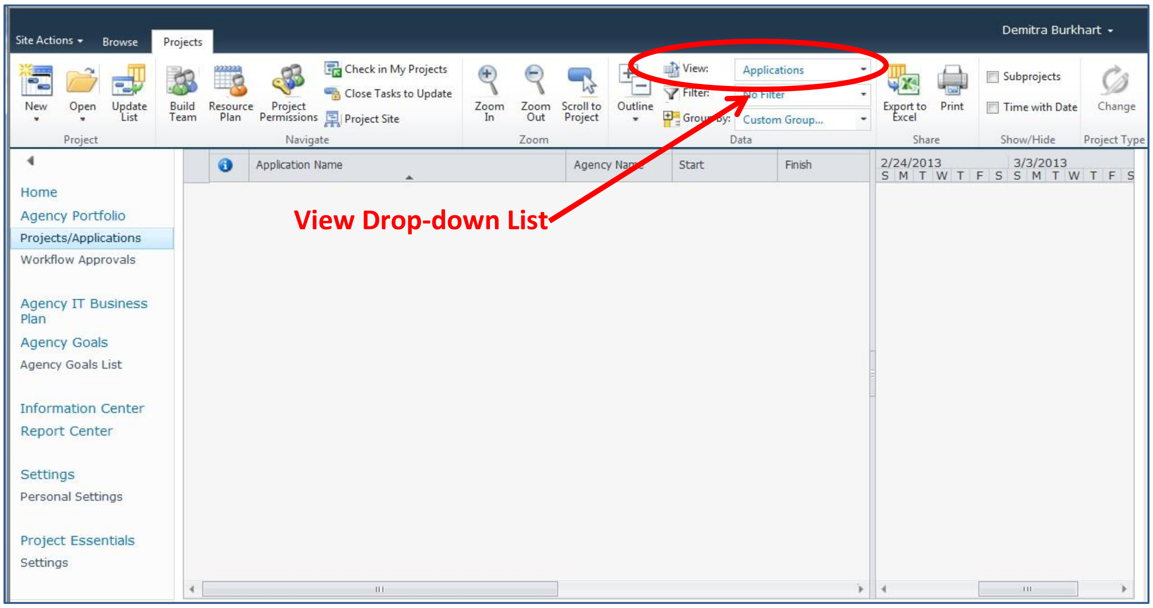
The table below provides a description of the components on the Agency Portfolio screen.

Component	Description
Area Navigation Bar	The Area Navigation bar is shown throughout IT ALPS. The Area Navigation bar serves as your main menu for navigating between the four areas within IT ALPS. The Area Navigation bar contains the following options: • **Home**—this selection takes you back to the IT ALPS home page. • **Agency Portfolio: Project/Applications**—this selection takes you to the page where you can manage your agency's projects and applications. • **Agency Portfolio: Workflow Approvals**—this selection takes you to the page where you can view the items that are in the workflow. • **Agency Goals: Agency Goals List**—this section takes you to the page where you can add, delete, and modify agency goals. *Note:* This feature is not currently being used. • **Information Center**—this selection takes you to the page where you can access the training labs, user documentation, and announcements from SIM. • **Report Center**—this selection takes you to the page where you can run reports for projects, applications, goals, and optimization.
Toolbar	The toolbar contains all of the actions that can be taken relative to the page displayed. The toolbar will change based on where you are in IT ALPS and what actions can be performed at that time.
Tabs	Tabs enable you to switch between related pages within an IT ALPS area. The Tabs area will change and display editing tools if you are entering text into a text field.

Component	Description
Work Center	Throughout IT ALPS, data will be displayed to you in a table format. Selections made on the toolbar will govern what is displayed in the table.

Understanding the View Setting

Within the agency work center, the View setting governs the information displayed. This setting also determines the options available to you on the Area Navigation bar.



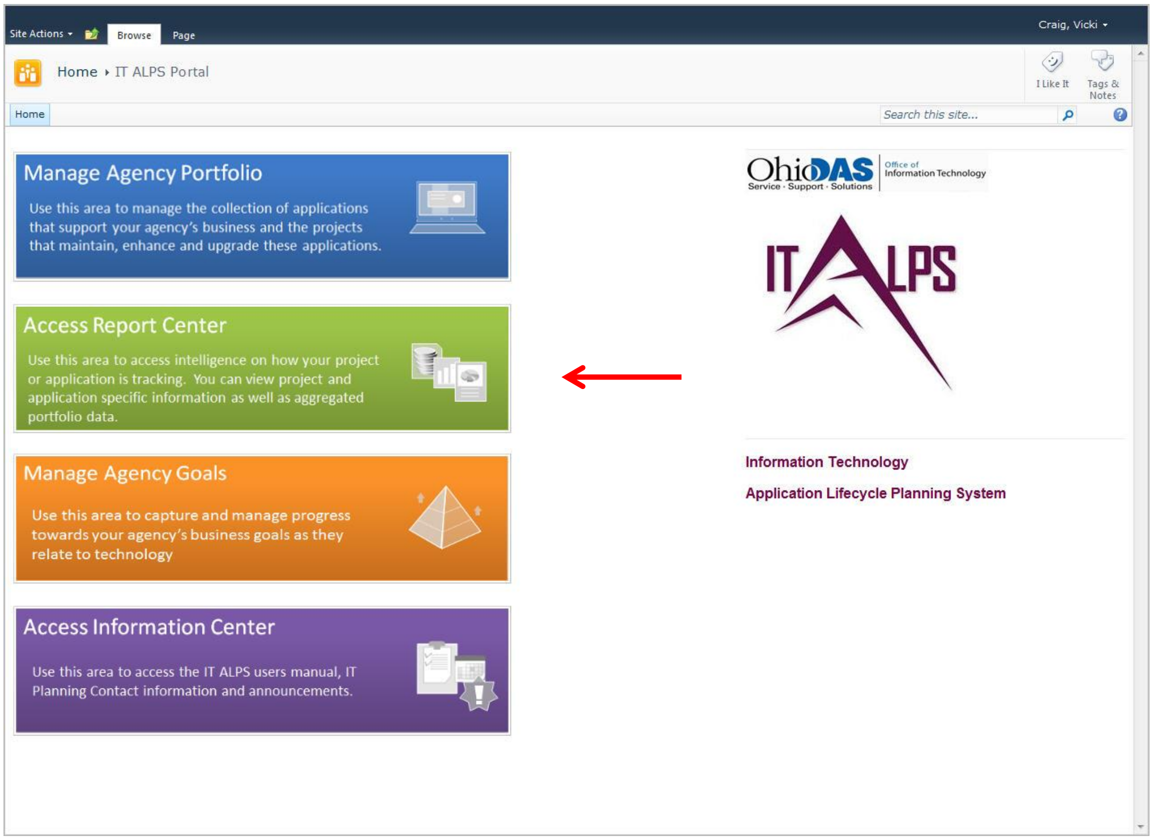
When you click the View drop-down list, you will have the following options:

- **Agency**—this option is to view information relevant to your agency.
- **Applications**—this option is to view information relevant to your agency's applications.
- **Monitoring & Control**—this feature has not been rolled out yet.
- **Projects**—this option is to view information relevant to your agency's projects.
- **Projects in Approval**—this feature has not been rolled out yet.

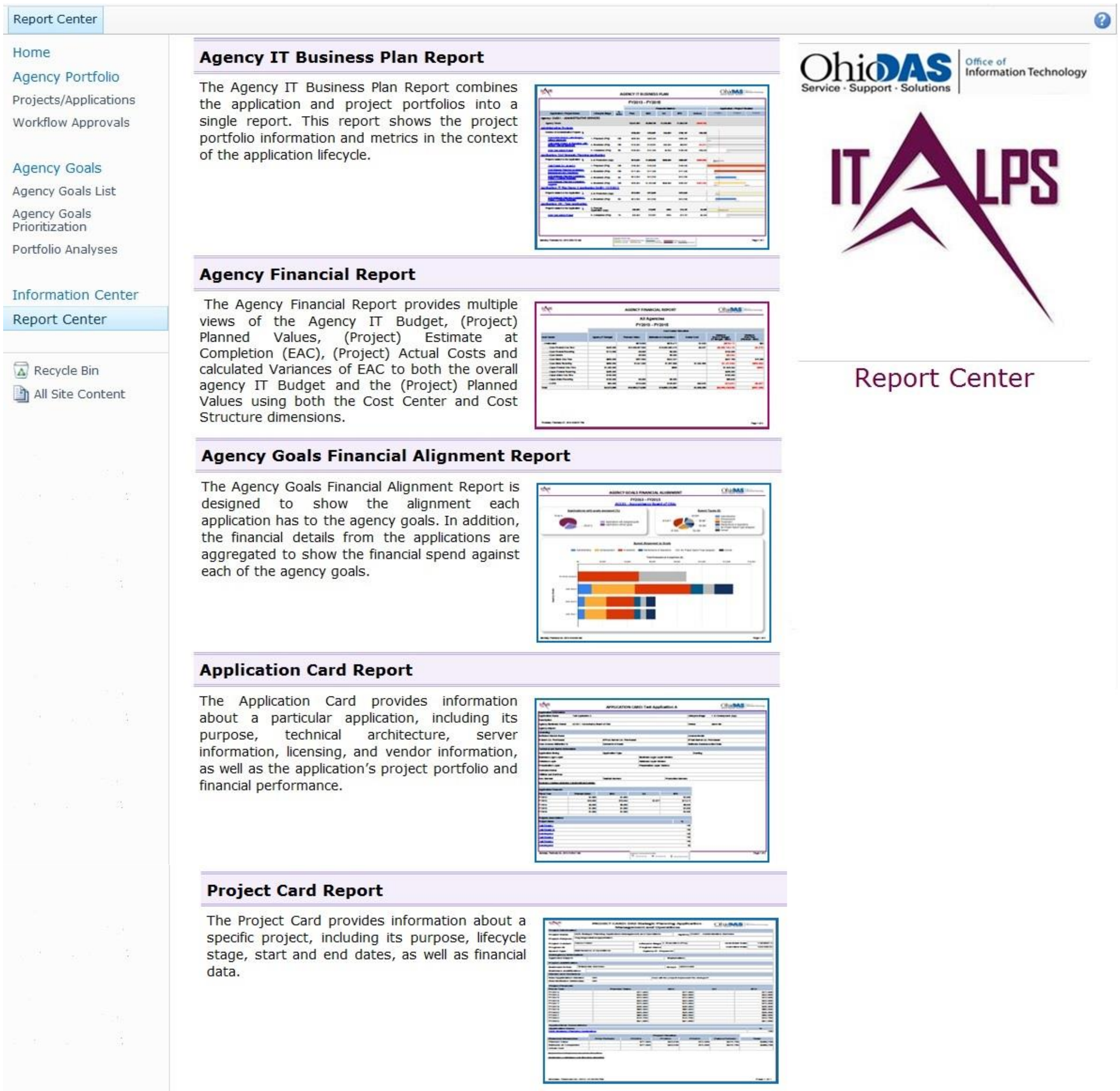
Navigating the Report Center

The Report Center is the area within IT ALPS where you can access the reports that have been created to help you manage your agency's projects and applications.

To access the Report Center area, click on **Access Report Center** from the home page.



Result: The Report Center area displays the reports available to you.



Accessing the Reports

To access a report, click on the thumbnail image of the report and the report will display.

The following lists the five reports available and a description of each report:

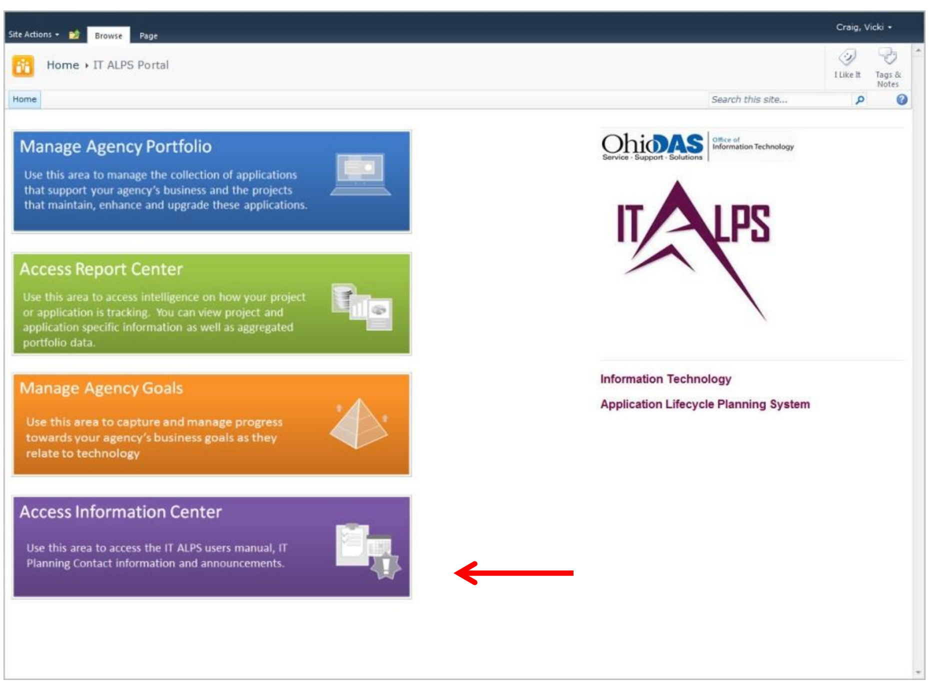
- **Agency IT Business Plan Report**—The Agency IT Business Plan Report combines the application and project portfolios into a single report. This report shows the project portfolio information and metrics in the context of the application lifecycle.

- **Agency Financial Report**—The Agency Financial Report provides multiple views of the Agency Planned Value (Budget), Project Planned Values, (Project) Estimate at Completion (EAC), (Project) Actual Costs and calculated Variances of EAC to both the overall agency IT Budget and the Project Planned Values using both the Cost Center and Cost Structure dimensions.
- **Agency Goals Financial Alignment Report**—The Agency Goals Financial Alignment Report is currently not being used and will be reviewed at a later time.
- **Application Card Report**—The Application Card provides information about a particular application, including its purpose, technical architecture, server information, and licensing information, as well as the application's project portfolio and financial performance.
- **Project Card Report**—The Project Card provides information about a specific project, including its purpose, lifecycle stage, start and end dates, as well as financial data.

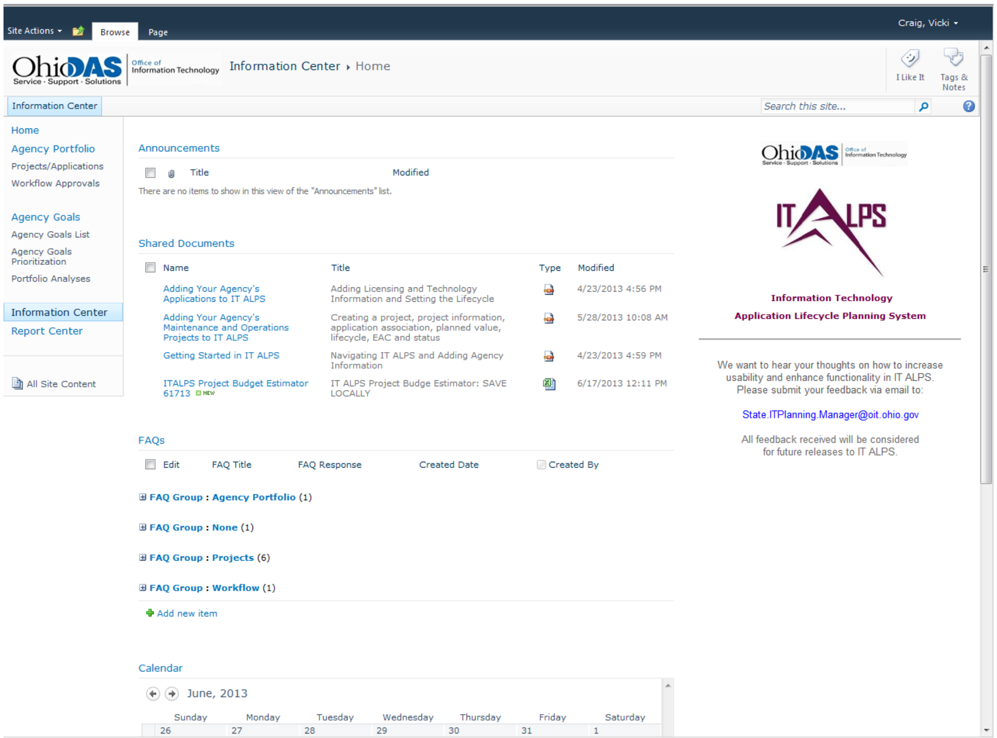
Navigating the Information Center

The Information Center is the area within IT ALPS where you can access documentation and contact information to help you use the IT ALPS tool and understand the process milestones.

To access the Information Center area, click on **Access Information Center** from the home page.



Result: The Information Center area displays.



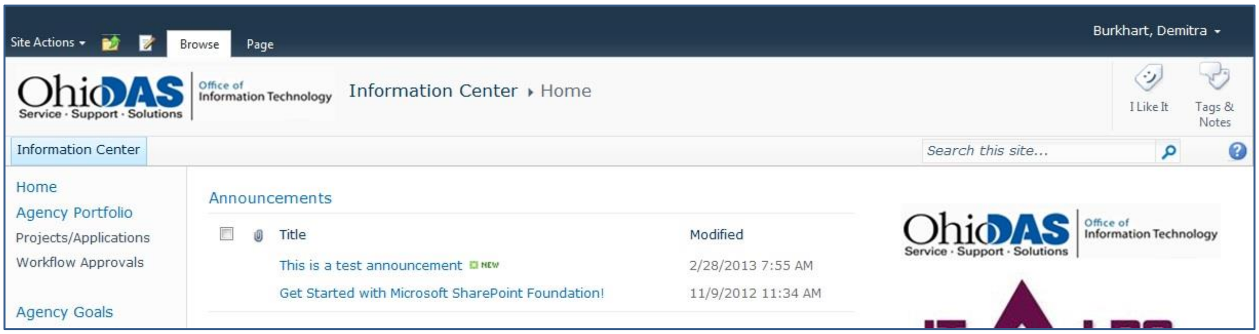
This page is divided into four sections:

- **Announcements**—This section contains information regarding upcoming events, process milestones, or other announcements that the IT planning staff wants to share with you.
- **Shared Documents**—This section contains documentation such as this IT ALPS Users Guide and a listing of the OIT Analysts assigned to each agency.
- **FAQs**—This section contains frequently asked questions and their answers broken into category groups.
- **Calendar**—This section contains a calendar of upcoming events and milestones with regard to IT Planning.

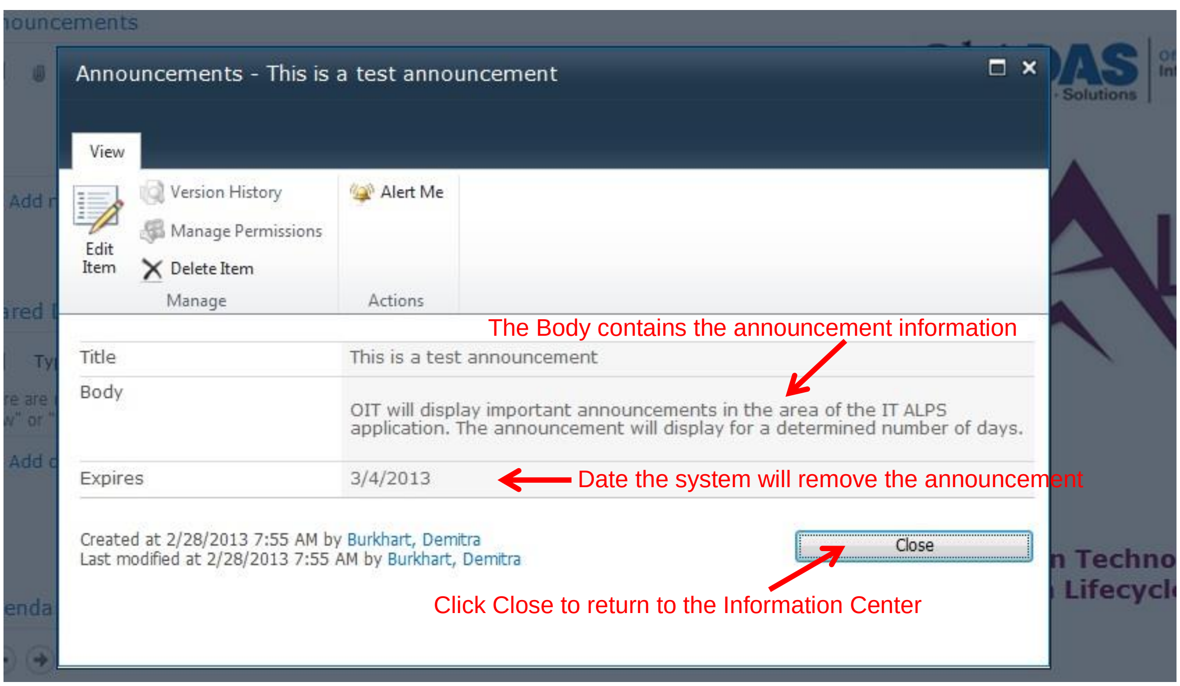
Accessing Announcements

SIM will display important information concerning IT Planning in the Announcements area.

When a new announcement is added, the system displays the title of the announcement, the date of the announcement, and a New icon (NEW). The system displays a list of the announcements in order of their release date. An example of a new announcement is below.



To open an announcement, simply click on the title of the announcement. The page displays the message and the date the message will expire (be removed from the system).



After you have read the message, simply click **Close** to return to the Information Center area.

You will want to check the Information Center on a regular basis to ensure that you do not miss important announcements.

Accessing Shared Documents

This area contains support documentation to help you navigate the IT ALPS application.

When a new document is added, the system displays the title of the document, the date the document was added, and a New icon (NEW). The system displays a list of the documents in order of their release date.

To access a document, follow the steps below:

1. Click the drop-down arrow next to the title of the document.
2. From the drop-down list, select **Send To** and **Download a Copy**.
   Result: You will be prompted to save the document.
3. Click **Save**.
   Result: A message will display stating the document has downloaded and prompting you to open it.
4. Click **Open**.
   Result: The document will display.

Accessing FAQs

This area contains frequently asked questions and their answers organized into category groupings.

To access an FAQ, follow the steps below:

Click the **+** next to the FAQ Group name that is closest to the topic you have a question on.
Result: The grouping will expand and all of the questions and answers will be displayed.

Viewing the Calendar

This area contains a calendar that is maintained by SIM staff and contains the dates of all upcoming agency events as they relate to IT ALPS.

Understanding Records in IT ALPS

To update agency, application, or project information, IT ALPS requires users to 'check-out' the associated record. When a record is checked out:

- Other users can access a read-only view of the page.
- Other users cannot modify the information on the page.

When you complete the updates, it is important to remember to check-in the file so that others have the opportunity to access the most current information.

Checking Out a Record in IT ALPS

Follow the steps below to check-out a record in IT ALPS.

1. Navigate to the page you wish to update.
2. On the toolbar, select **Edit** to check-out the file.
   Result: The **Status** changes to show the file is checked-out and the fields are now active.
3. Make any necessary updates to the record.
4. When you are ready to save and/or check-in the record, continue with *Checking in a Record in IT ALPS*.

Checking In a Record in IT ALPS

IT ALPS provides the flexibility to update a record, save the changes, and keep the record checked out. The system also provides the capability to save the changes and check-in a record in one-step.

To ensure others have access to the most current information, save and check-in the record after completing the updates.

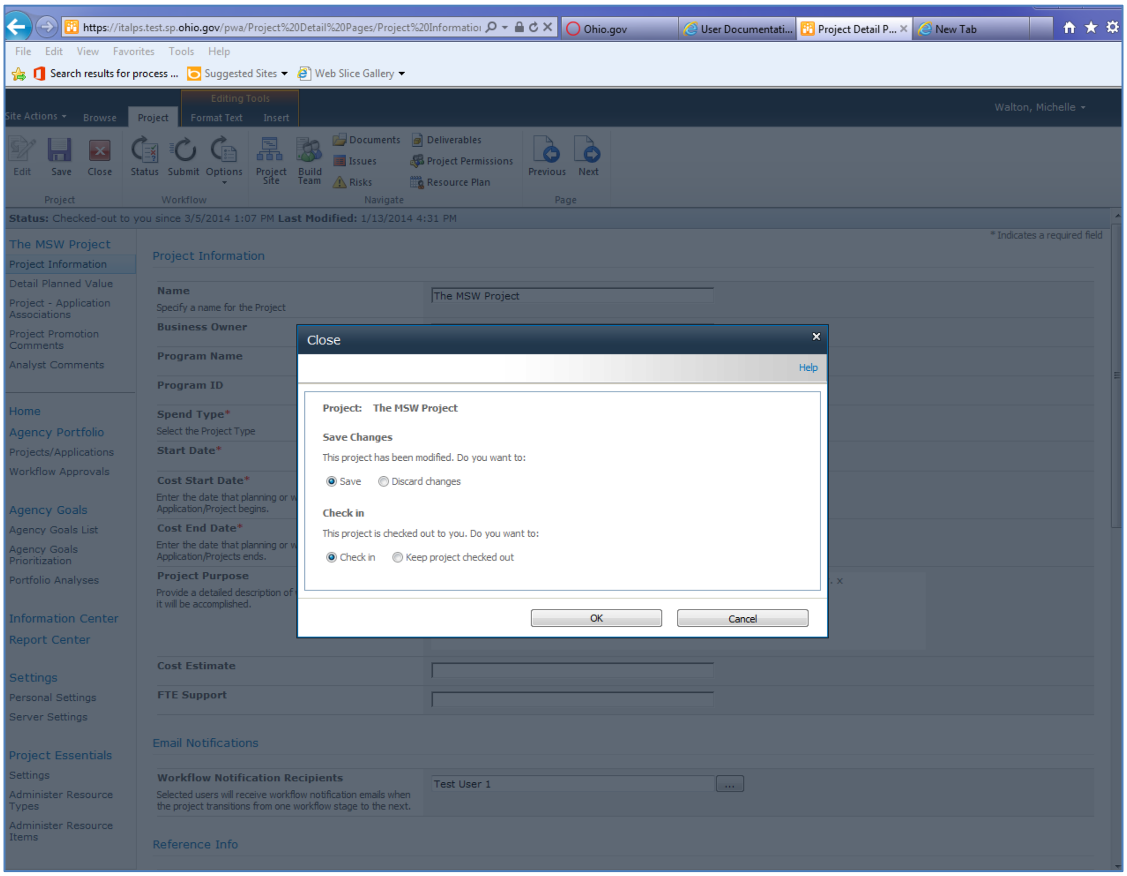
Saving Changes to a Record

To save changes made to a record, on the toolbar, click **Save** .
Result: The system processes the request and displays a confirmation message. The information is saved in IT ALPS; however, the file is still checked-out, and all of the fields are still active.

Saving Changes and Checking In a Record

Follow the steps below to save and check-in a record in one-step.

1. After updating the record, on the toolbar, click **Close** .
   Result: The system displays a **Close** dialog box with two questions.

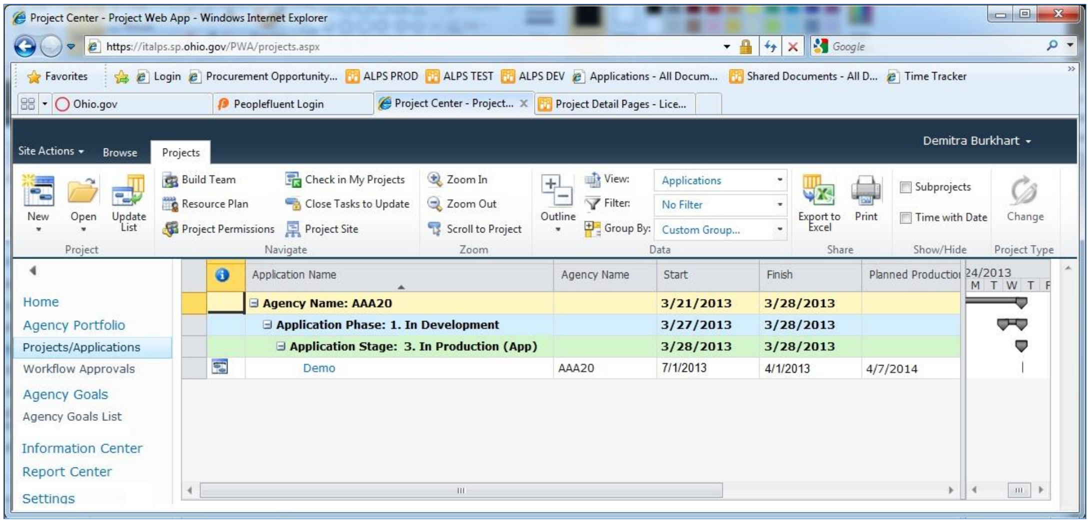


2. In the **Save Changes** section, select **Save** to update the file with the changes you made.

3. In the **Check in** section, select **Check in** to check the file back in to the system.

4. Click **OK**.
   Result: The system displays confirmation messages as it processes the request, saves the information, and checks-in the file. The system closes the page and

navigates back to the agency work center.



Managing Your Agency's Profile

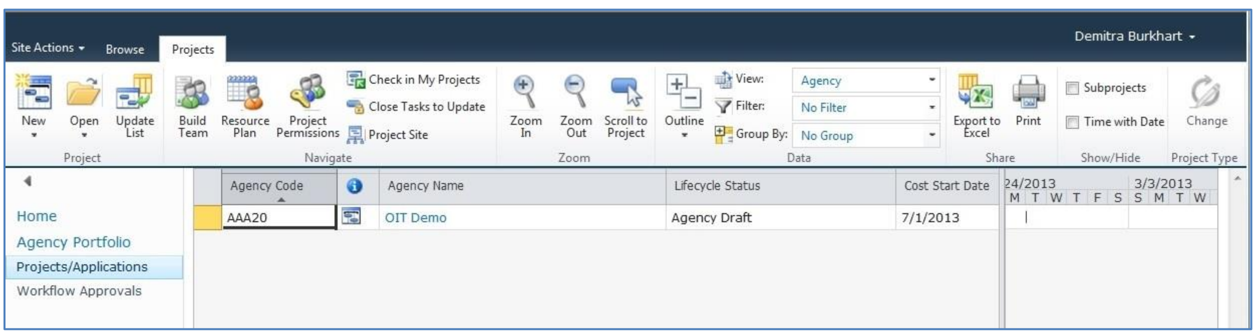
Each Agency's profile or base information has been entered into IT ALPS, Agency Users and Agency Approvers have the ability to enter additional information regarding their agency, such as the agency's mission statement and agency's budget (planned value).

Adding Your Agency's Mission Statement

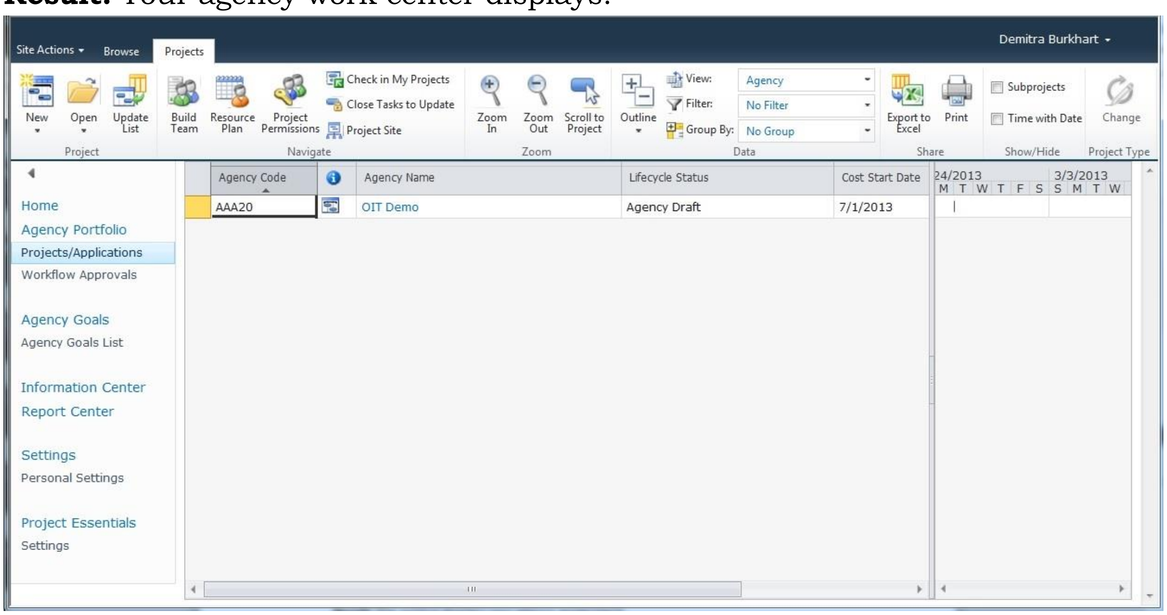
Each agency has a mission statement which captures the agency's business mission or purpose. IT ALPS enables you to capture your agency's mission statement.

To add your agency's mission statement, follow the steps below.

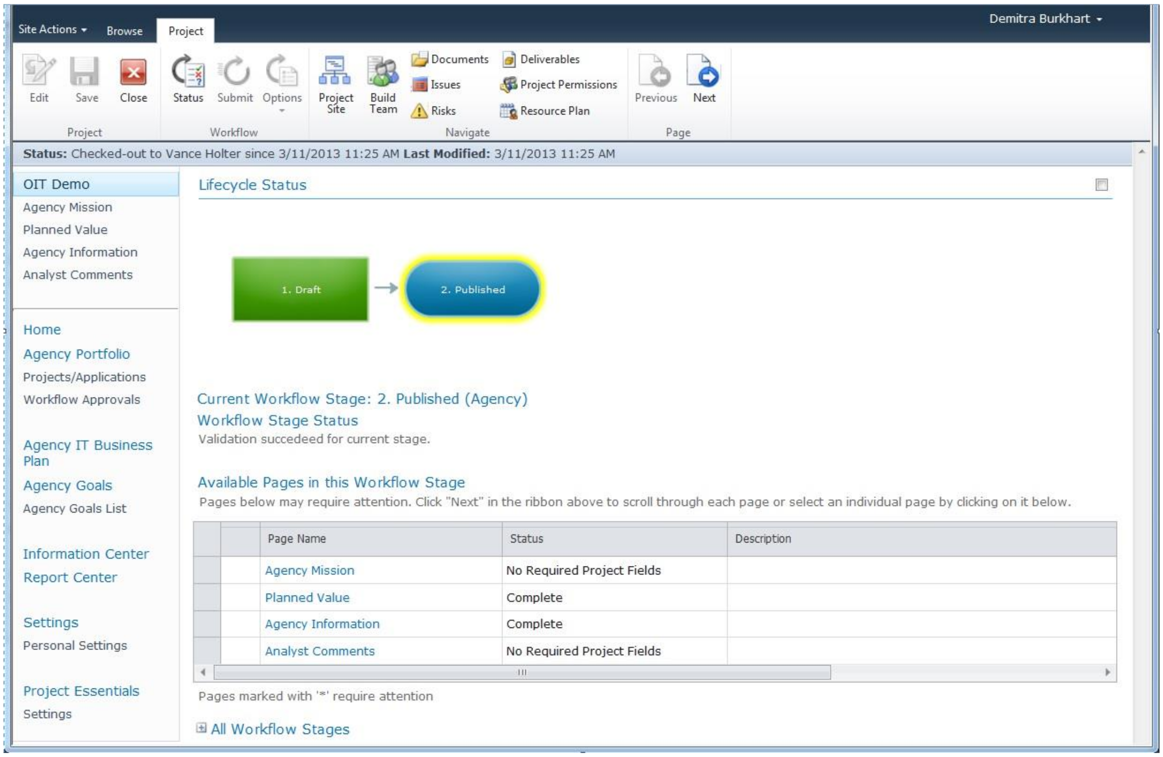
1. From the IT ALPS home page, click **Manage Agency Portfolio.**
   Result: The Agency work center displays.
2. On the toolbar, click the **View** drop-down list and select **Agency**.



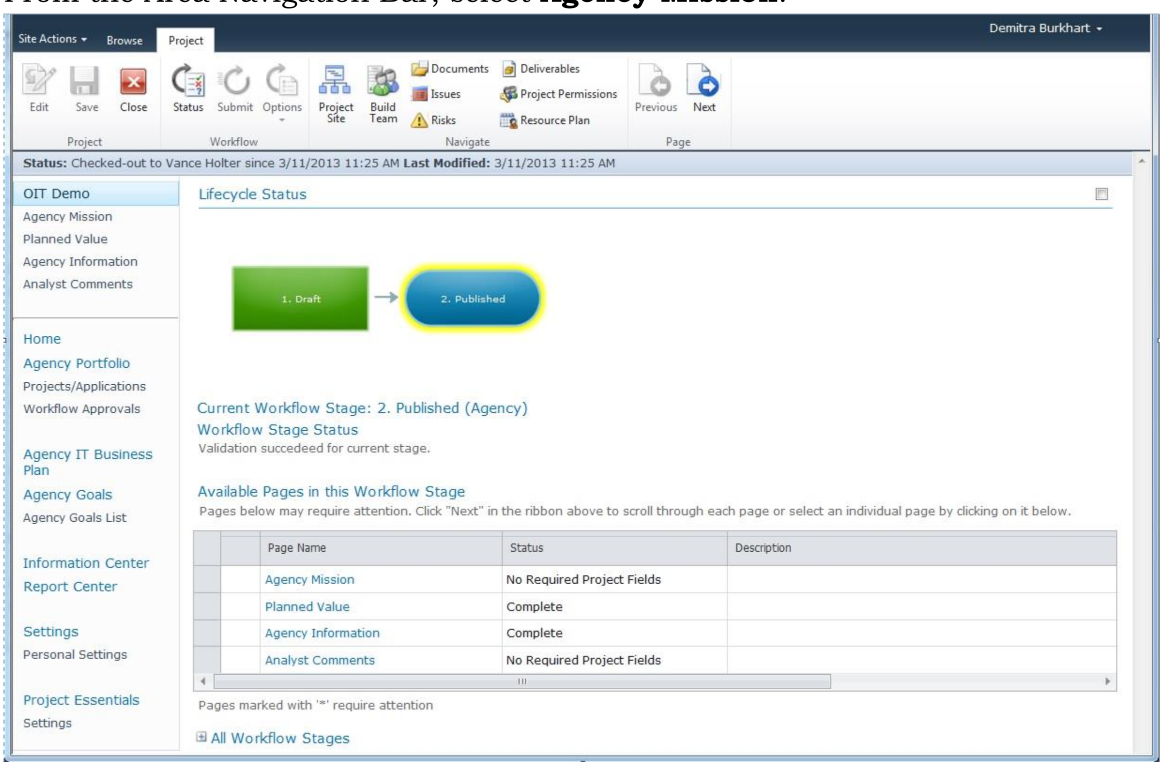
Result: Your agency work center displays.



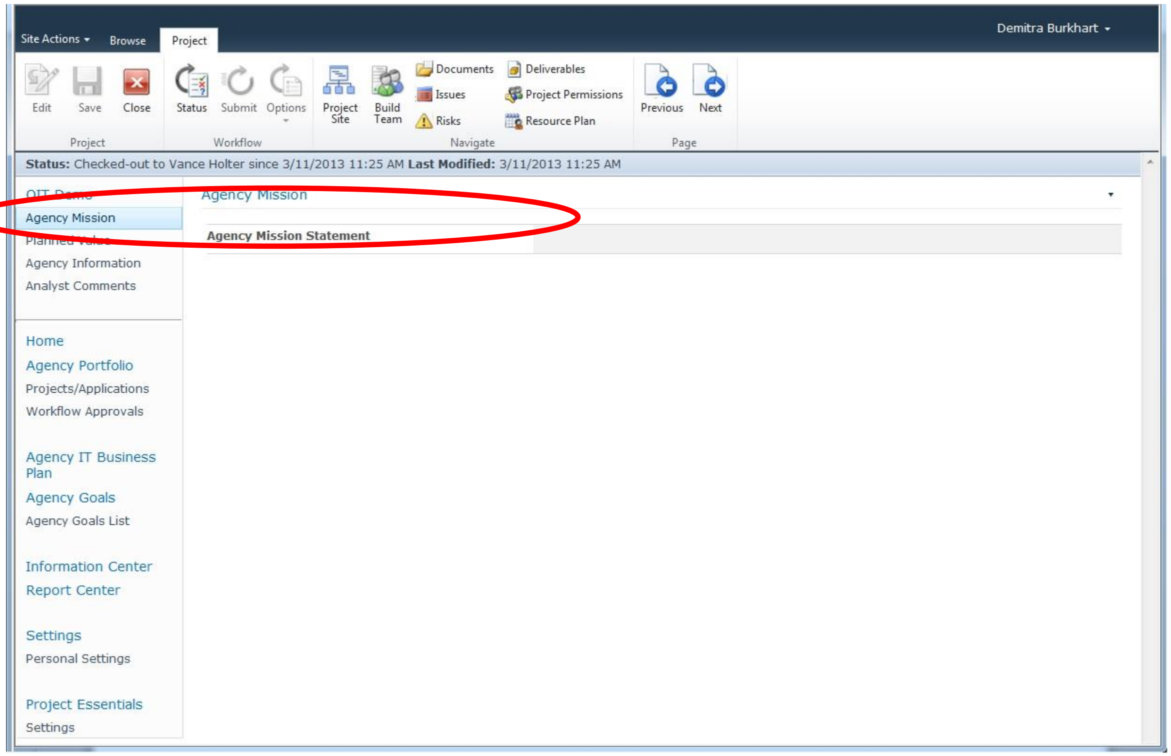
3. Select the name of your agency, in the **Agency Name** column.
   Result: Your **Agency Lifecycle Status** page displays.



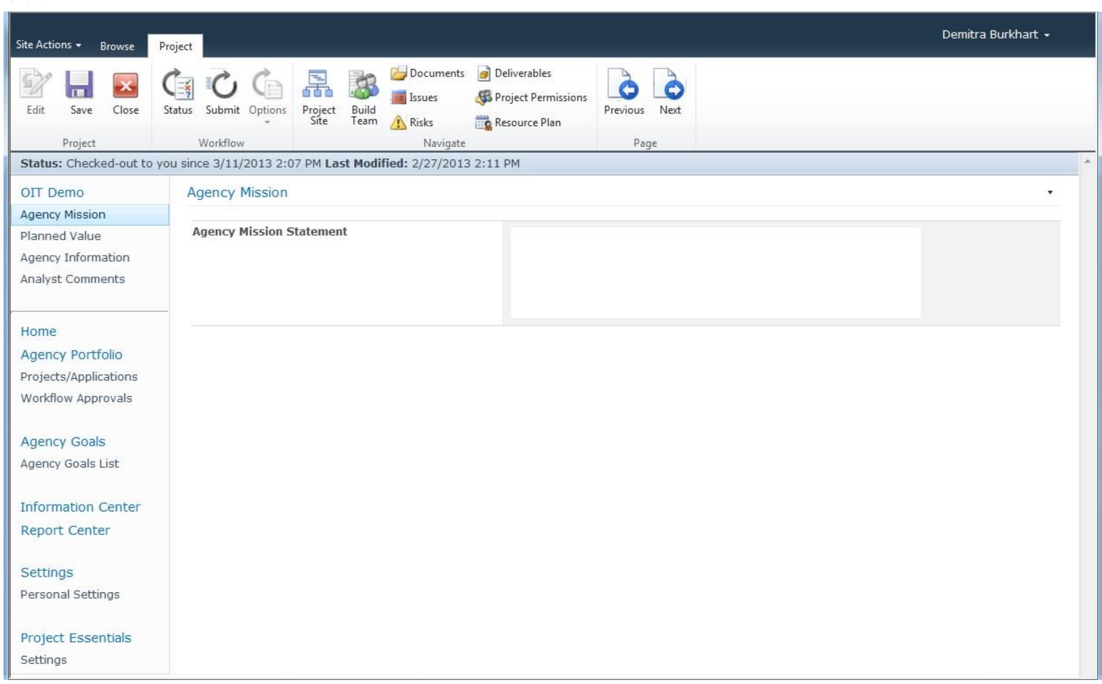
4. From the Area Navigation Bar, select **Agency Mission**.



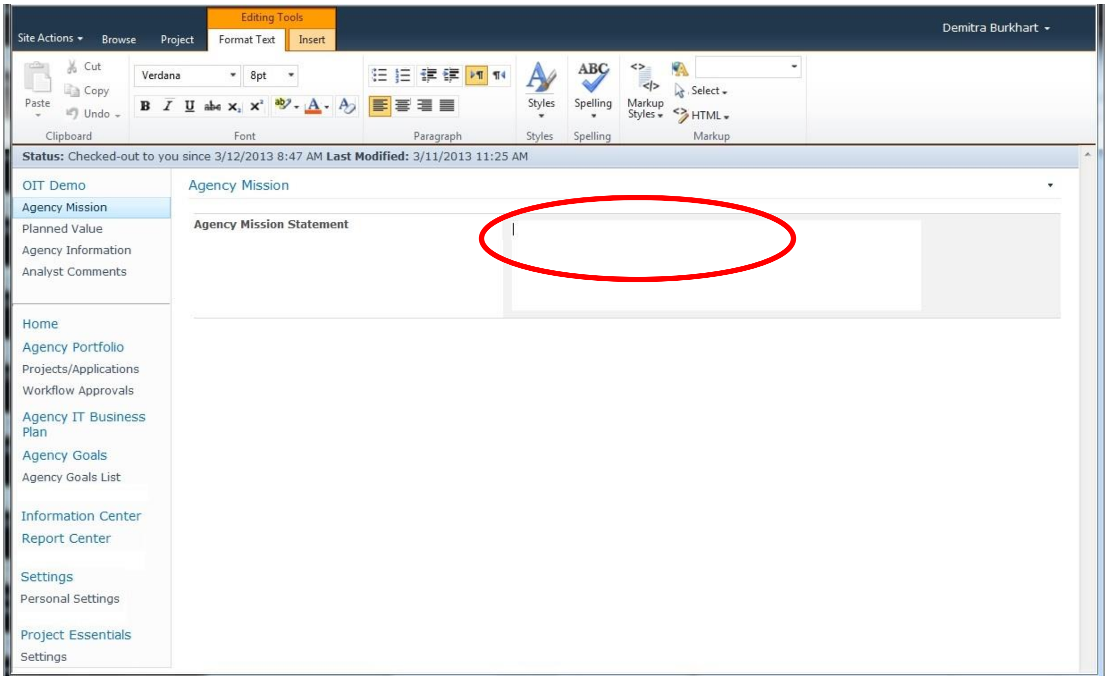
Result: The system displays the **Agency Mission** page.



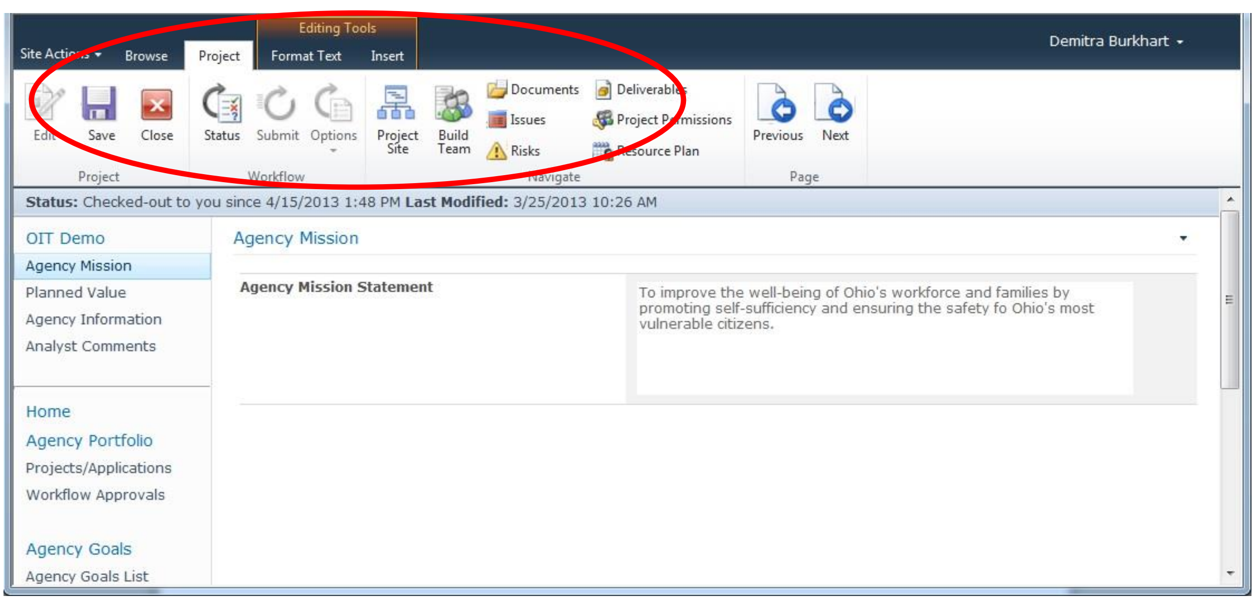
5. To begin adding the mission statement, click the **Edit** button  on the toolbar to check out the agency record.
   Result: A status message displays indicating that the agency record is checked-out.



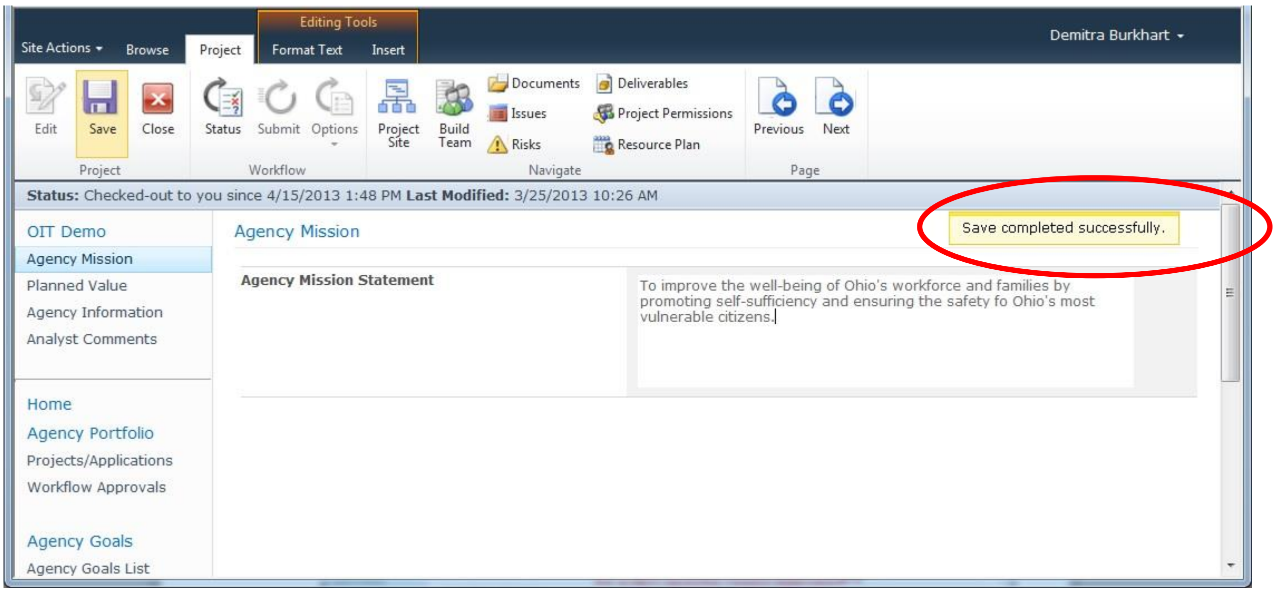
6. In the **Agency Mission Statement** text field, enter your agency's mission statement.
   Note: When you click in the Agency Mission Statement field, the Editing Tools tabs will become active, and you can enter your agency's mission statement and format the text as needed.



7. After you have entered your agency's mission statement, click the **Project** tab, above the toolbar.
   Result: The system closes the Editing Tools and activates the icons to save and check-in the mission statement.



8. On the toolbar, click **Save** to save the mission statement to your agency's record.
   Result: A confirmation message displays.



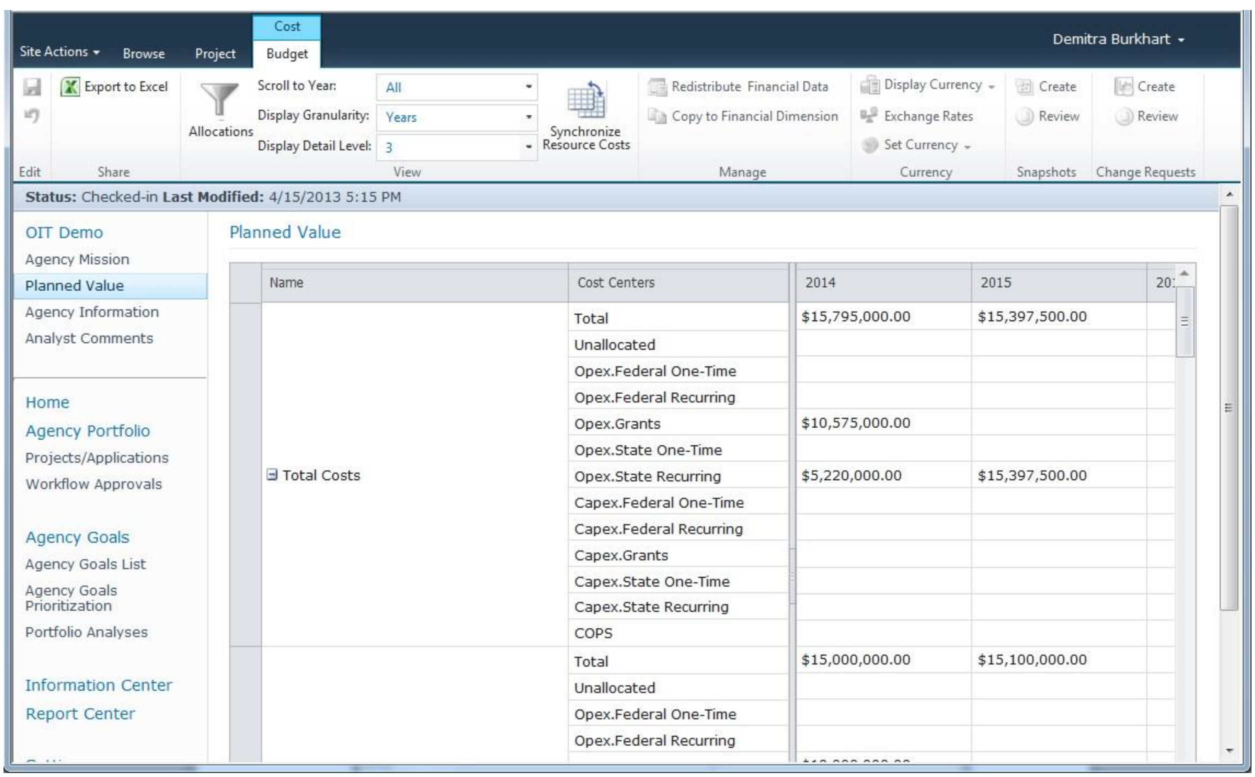
9. On the toolbar, click **Close** to check in your agency record.

Adding Your Agency's IT Planned Value

The Agency Planned Value captures the agency's IT budget. The budget is entered by state fiscal year.

To enter your agency's IT budget, follow the steps below:

1. From the IT ALPS home page, click **Manage Agency Portfolio.**
   Result: The Agency work center displays.
2. On the toolbar, click the **View** drop-down list and select **Agency**.
   Result: Your agency work center displays.
3. Select the name of your agency, in the **Agency Name** column.
   Result: Your **Agency Lifecycle Status** page displays.
4. From the Area Navigation Bar, select **Agency Planned Value**.
   Result: The system displays the **Agency Planned Value** page.



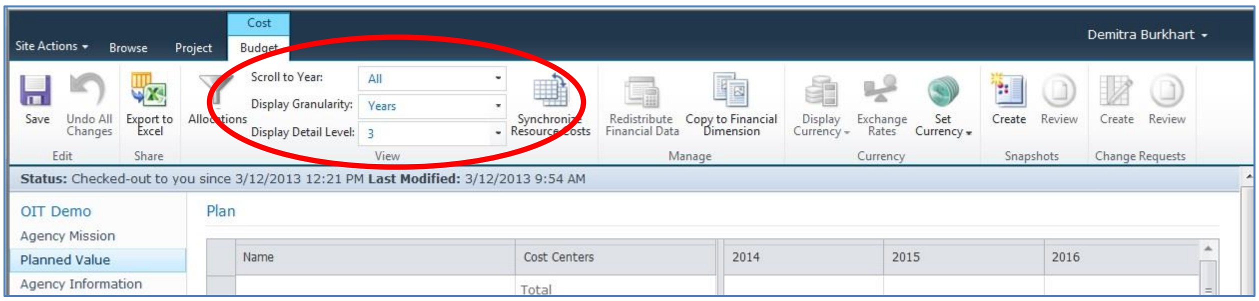
5. On the toolbar, use the **View** drop-down lists to specify how your Agency Planned Value information is displayed.

   - From the **Scroll to Year** drop-down list, select which fiscal year you would like to enter the planned value for or select All.

- From the **Display Granularity** drop-down list, select whether you would like to view the budget information by years, semesters, quarters or months.
  Note: Years is the preferred setting.

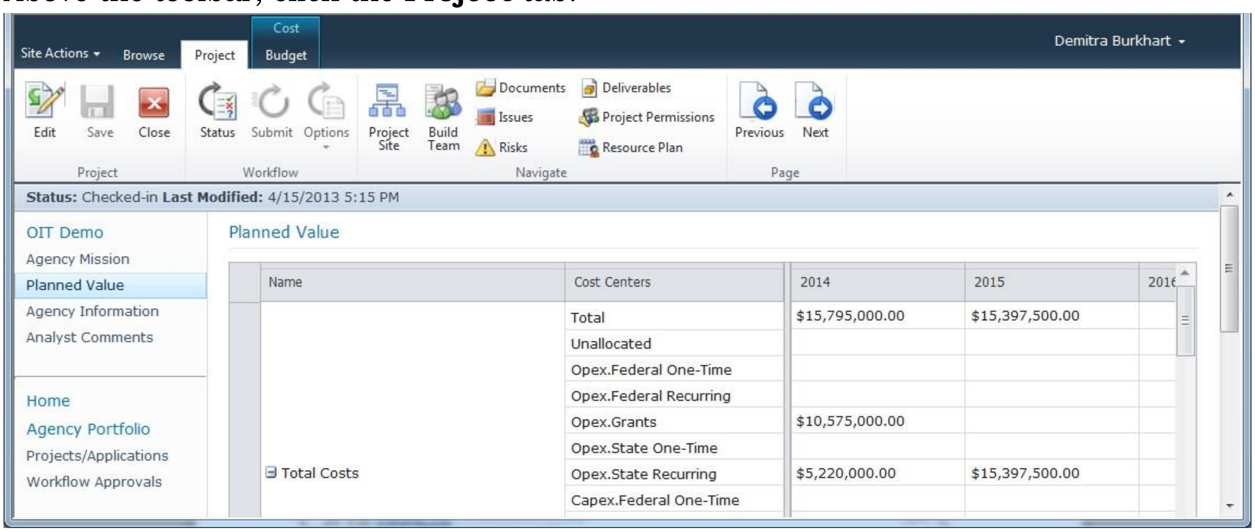
- From the **Display Detail Level** drop-down list, select the detail level at which you would like to view your budget information. The choices are numbered from 1 to 2; level 1 represents the total and level 2 represents the detail.

  Note: Level 3 is no longer in use. It will be removed from the drop-down in a future release.



Result: The system displays the budget information at the detail level specified.

6. Above the toolbar, click the **Project** tab.

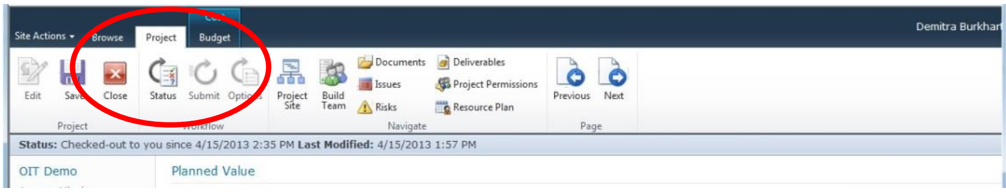


7. On the toolbar, click **Edit** to check-out the **Agency Planned Value** record.
   Result: The **Status** bar displays the record as checked-out.

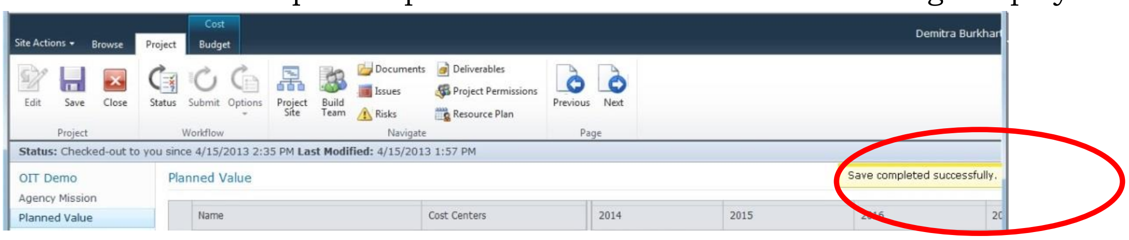
8. To edit your agency's budget information, scroll to the appropriate cost center fields, and enter the desired dollar amounts.
   Note: IT ALPS auto formats the amounts entered. When entering a whole number, you do not need to enter $s, commas, or decimal points. For example, enter 1000000 and the system will display $1,000,000.00. If entering less than a whole number, enter the decimal point. For example, enter 1000000.50 and the system

will auto format the amount and display $1,000,000.50.
Result: As you enter budget numbers, the system rolls the amounts up to the highest level, **Total Costs**.

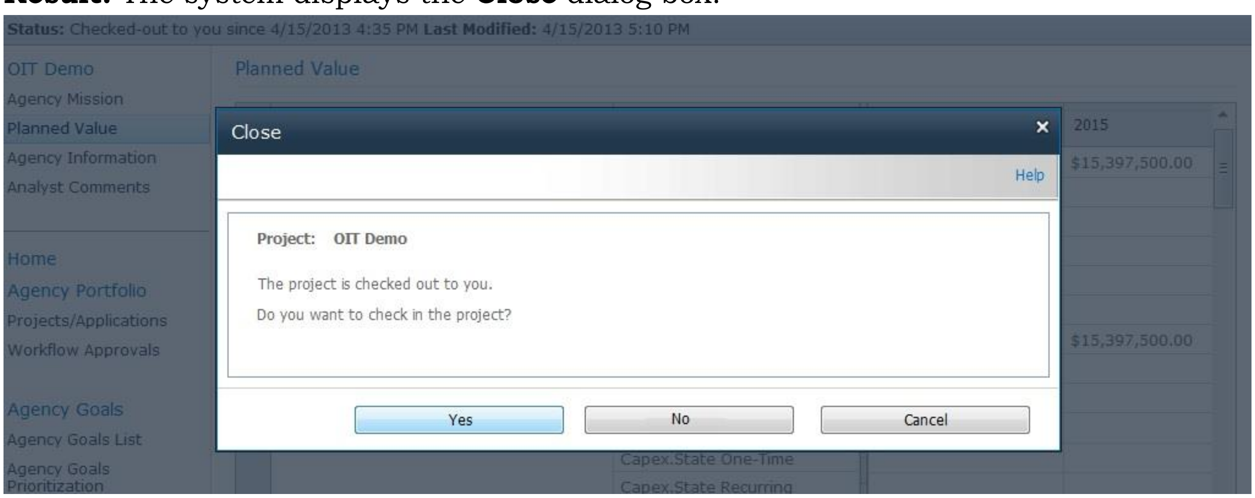
9. After you have modified all the desired budget information in the appropriate cost center fields, select the **Project** tab above the toolbar.



10. On the toolbar, click **Save** to save the agency **Planned Value** information entered.
Result: The save request is processed and a confirmation message displays.



11. If you have finished entering your planned value information, from the toolbar, click **Close** to check-in the Planned Value record.
Result: The system displays the **Close** dialog box.



12. Click **Yes** to check-in the file.
Result: The save request is processed and a confirmation message is displayed. When the check-in request is completed, the **Planned Value** page closes and the agency work center is displayed.

Managing Your Agency's Application Portfolio

Each Agency has applications which support its missions and goals. A crucial part of Application Planning is to identify and plan for the Resources that will support an Application. This is accomplished by creating one Application Resource Plan – in Fiscal Year increments - for each Application.

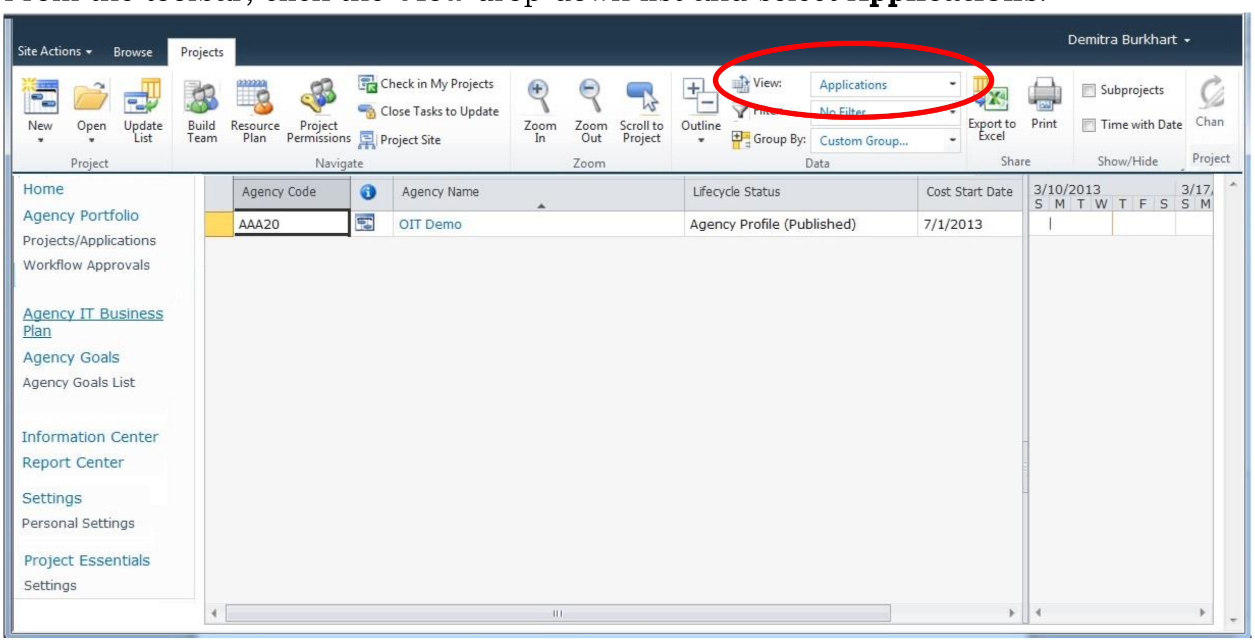
Resources are identified in four Classes: Labor, Hardware, Software and Enterprise Services. Application Resource Plans allow an Agency to identify and plan for the Resources it will need to support an Application over the Application's lifetime.

There are no dollar amounts associated with an Application Resource Plan. The Application Resource Plan helps you record the expected resources. Later, when you create Projects to support this Application, you will use the Resource Plan as a guide to plan project resources. The monetary costs will be included in the Project Planned Value (budget) of your individual projects.

This section steps you through adding an Application and its Resource Plan, as well as setting the Application's lifecycle stage.

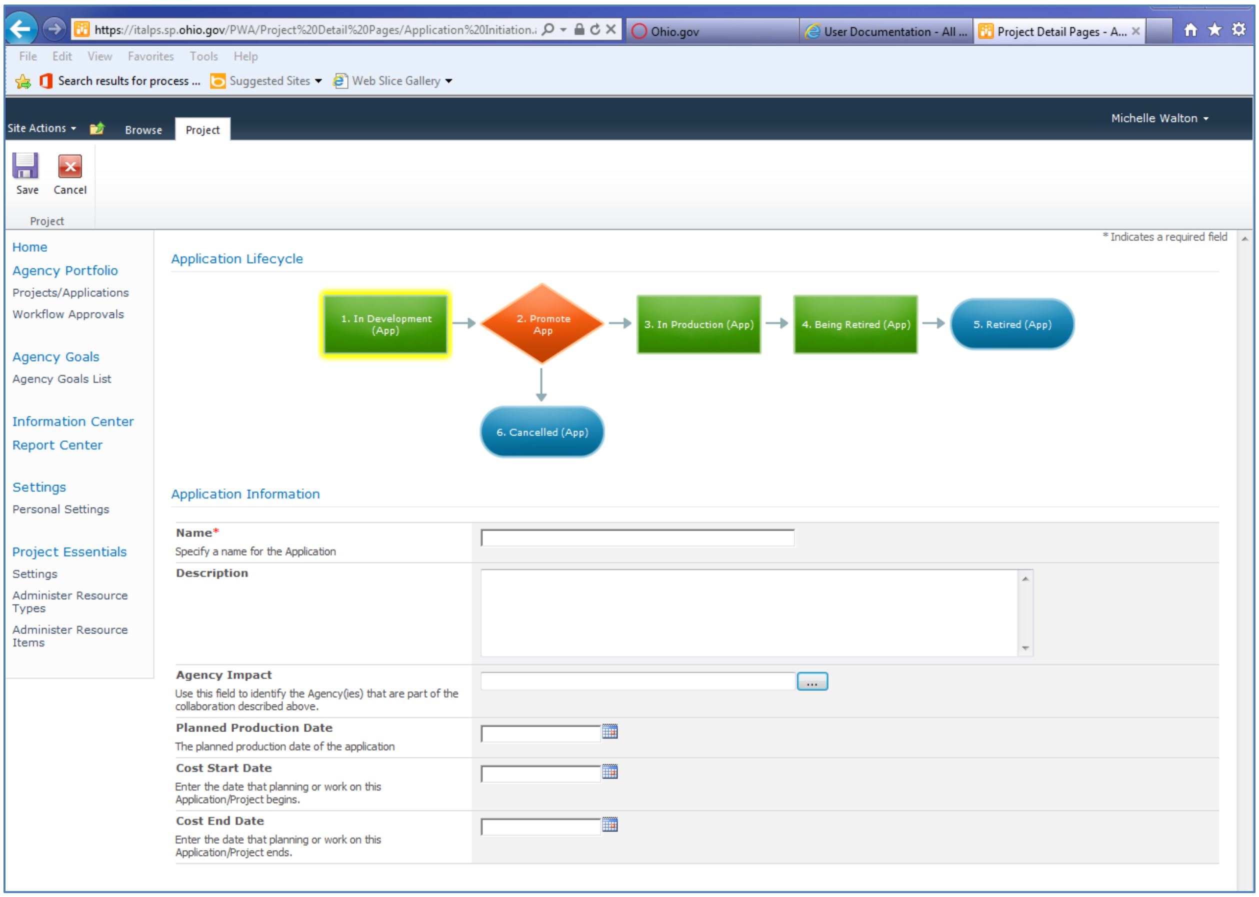
Adding an Application

1. From the IT ALPS home page, click **Manage Agency Portfolio**.
   Result: Your agency work center displays.
2. From the toolbar, click the **View** drop-down list and select **Applications**.



   Result: The system displays the application work center.

3. From the toolbar, click **New** and select **Application** from the drop-down list.
   Result: The system displays the Application Lifecycle page.



4. In the **Name** field, enter the name of your application using the convention below: XXX-ApplicationName, where XXX equals the agency's three letter OAKSID. A dash (-) should be entered between the OAKSID and the application name.

5. In the **Description** field, enter a text description of the application.

6. The **Agency Impact** field is not currently used for Applications.

7. If this Application is still in development, use the **Planned Production Date** field to record the date that you expect it to go into production. You may enter the date directly into the field or use the calendar icon to select the date. If the application is already in production, or you don't yet have a projected date, you may leave this field blank. You will have the opportunity to enter an actual production date on the next page.

8. In the **Cost Start Date** field, record the earliest date that you will plan resources and work for this application. You may enter the date directly into the field or use the calendar icon to select the date.

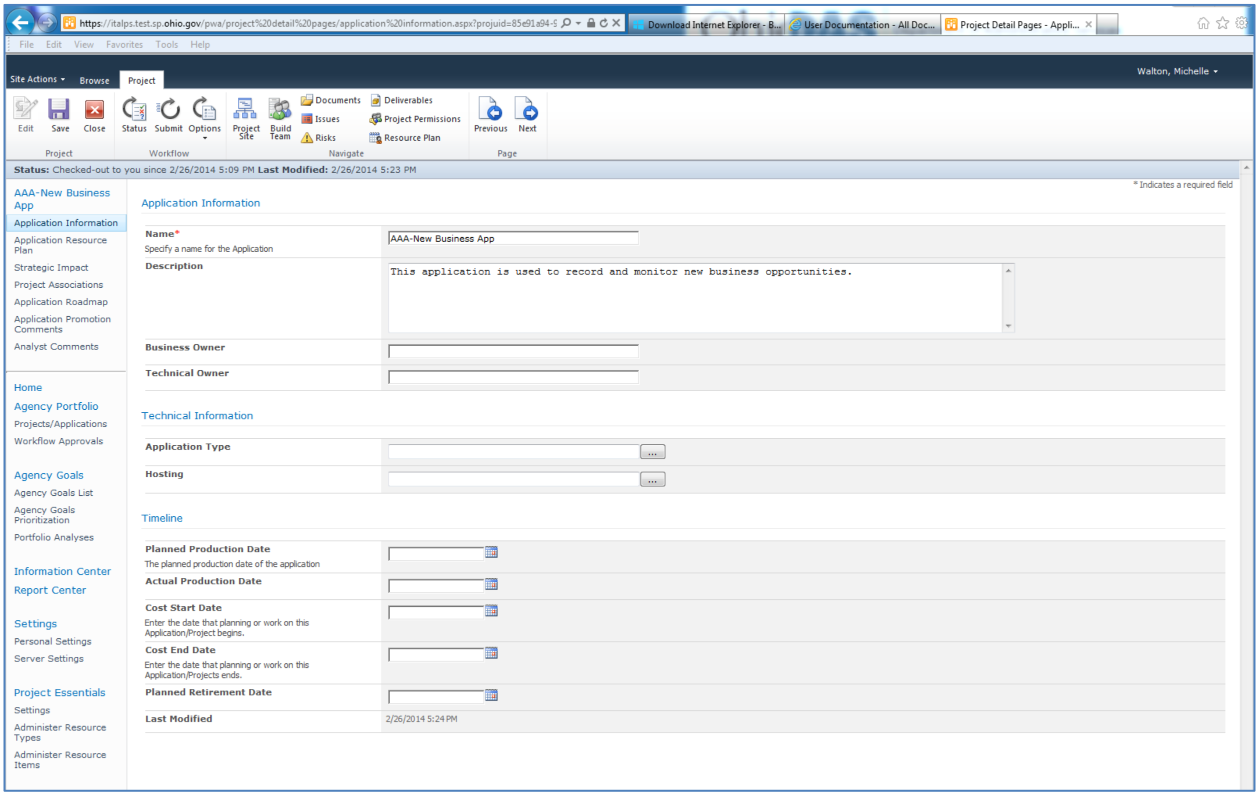
   Note: You can leave this field blank initially, but you will not be able to create your Application Resource Plan until it is completed with a valid date that is earlier than the **Cost End Date**.

9. In the **Cost End Date** field, record latest date that you will plan resources and work for this application – essentially the end of the period that you expect the application to remain in production. You may enter the date directly into the field or use the calendar icon to select the date.

   Note: You can leave this field blank initially, but you will not be able to create your Application Resource Plan until it is completed with a valid date that is later than the **Cost Start Date**. You can also change this field later if you extend or shorten the life of the application.

10. On the toolbar, click **Save** to save the application information.
    Result: The system processes the request and displays a confirmation message. The system will then display the **Application Lifecycle Status** page.

11. From the **Application Lifecycle Status** page, select **Application Information** from the Area Navigation Bar.
    Result: The system opens the **Application Information** page.
    Note: Some of the fields on this page are pre-populated from information entered on the **Application Lifecycle** page.



12. In the **Business Owner** field, enter name of the individual who represents the business authority for the application.

13. In the **Technical Owner** field, enter name of the individual who represents the Information Technology authority for the application.

14. In the **Application Type** field, click the icon and select the option which best describes the application type from the drop-down list.
CAUTION: Do not press the Backspace key in this field. Doing so will cause the values in the drop down lists on the screen to no longer display. If this inadvertently occurs, press F5 to refresh the page The values will reappear when you click the icon again.

15. In the **Hosting** field, click the icon and select the option which best reflects how the application is being hosted.
CAUTION: Do not press the Backspace key in this field. Doing so will cause the values in the drop down lists on the screen to no longer display. If this inadvertently occurs, press F5 to refresh the page. The values will reappear when you click the icon again.

16. The **Planned Production Date** field may be populated if you entered it on the intitial new application page. If the field is blank or if you wish to change it, you

may do so by entering the date directly into the field or using the calendar icon to select the date.

17. If this Application is already in production, use the **Actual Production Date** field to record the date that it went into production. Enter the actual date, even if it was in production before you began using ALPS. You may enter the date directly into the field or use the calendar icon to select the date.

18. The **Cost Start Date** field may be populated if you entered it on the intitial new application page. This field is used to record the earliest date that you will plan resources and work for this application. If the field is blank or if you wish to change it, you may do so by entering the date directly into the field or using the calendar icon to select the date.

    Note: You can leave this field blank initially, but you will not be able to create your Application Resource Plan until it is completed with a valid date that is earlier than the **Cost End Date**.

    Note: You may change the **Cost Start Date** and/or the **Cost End Date** after your Application Resource Plan is built. If your changes cause an increase in the fiscal years covered by the application, the additional fiscal year(s) will be added to the Application Resource Plan. If your changes cause a decrease in the fiscal years covered by the application, the eliminated fiscal year(s) and all associated Resources will be deleted from the Application Resource Plan.

19. The **Cost End Date** field may be populated if you entered it on the intitial new application page. This field is used to record the latest date that you expect to plan resources and work for this application – essentially the end of the period that you expect the application to remain in production. If the field is blank or if you wish to change it, you may do so by entering the date directly into the field or using the calendar icon to select the date.

    Note: You can leave this field blank initially, but you will not be able to create your Application Resource Plan until it is completed with a valid date that is later than the **Cost Start Date**. You can also change this field later if you extend or shorten the life of the application.

    Note: You may change the **Cost Start Date** and/or the **Cost End Date** after your Application Resource Plan is built. If your changes cause an increase in the fiscal years covered by the application, the additional fiscal year(s) will be added to the Application Resource Plan. If your changes cause a decrease in the fiscal years covered by the application, the eliminated fiscal year(s) and all associated Resources will be deleted from the Application Resource Plan.

20. In the **Planned Retirement Date** field, enter the date you expect the application to be retired and removed from production. You may enter the date directly into the field or use the calendar icon to select the date.

Note: You can change this field later if you extend or shorten the life of the application.

21. The **Last Modified** field is a display field that shows you the last time changes were saved to this page.

22. On the toolbar, click **Save** to save the application information.
Result: The system processes the request and displays a confirmation message.

23. On the toolbar, click **Close** to check in the file.
Result: The system displays the **Close** dialog box.

24. In the Close dialog box, click **Yes** to check in the file.
Result: The system processes the request and displays a confirmation message.

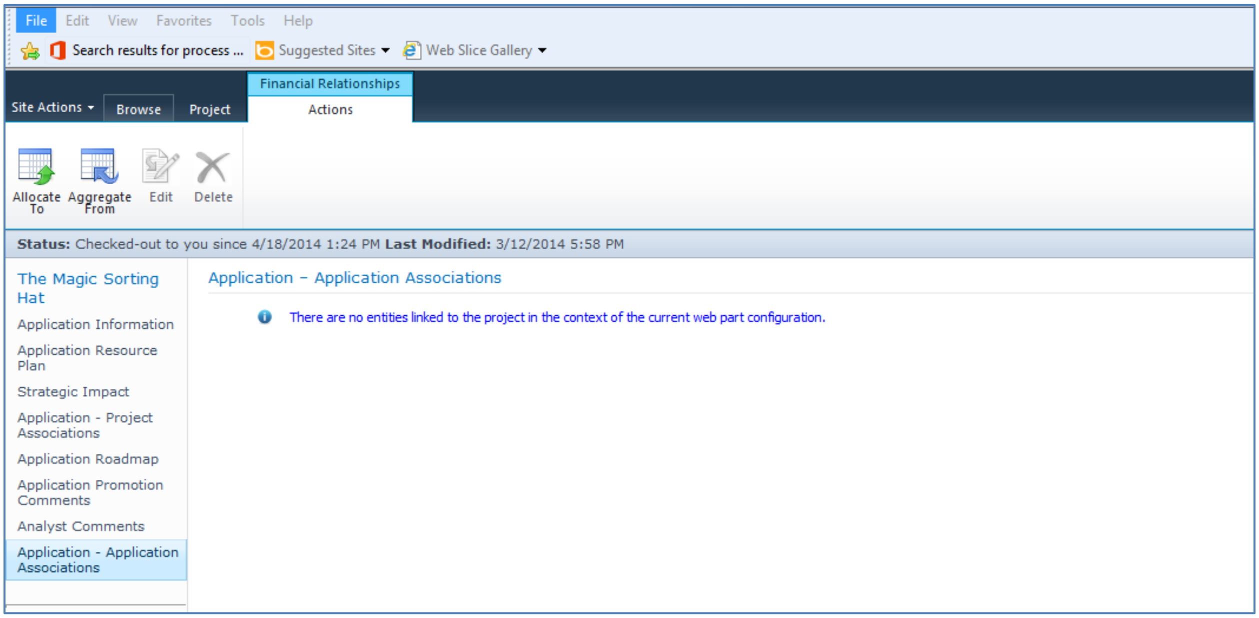
Associating Applications

An Agency may wish to record that an Application is related to one or more other Applications. Some situations that might trigger Application Associations are:

- A primary Application and independent modules of that Application that work together
- Applications that share some or all resources
- Applications that work together but support different user constituencies (for instance, a primary application used by internal agency users and a public-facing application allows the public to access a subset of the internal data.

- *Note:* This section outlines the steps to associate one application to another. It assumes that you have your application open and checked out to you.

1. From the Area Navigation Bar, select **Application-Application Associations**.
Result: The system displays the **Application-Application Associations** page. When you open this page before there are any associated Applications, the page will display the message "There are no entities linked to the project in the context of the current web part configuration."



2. Determine the relationship of the Application you wish to associate to the one you have open. If the associated Application is subordinate to (a child of) the open Application, then select the **Aggregate From** icon from the toolbar. If the associated Application is Primary to (a parent of) the open Application, then select the **Allocate To** icon from the toolbar.

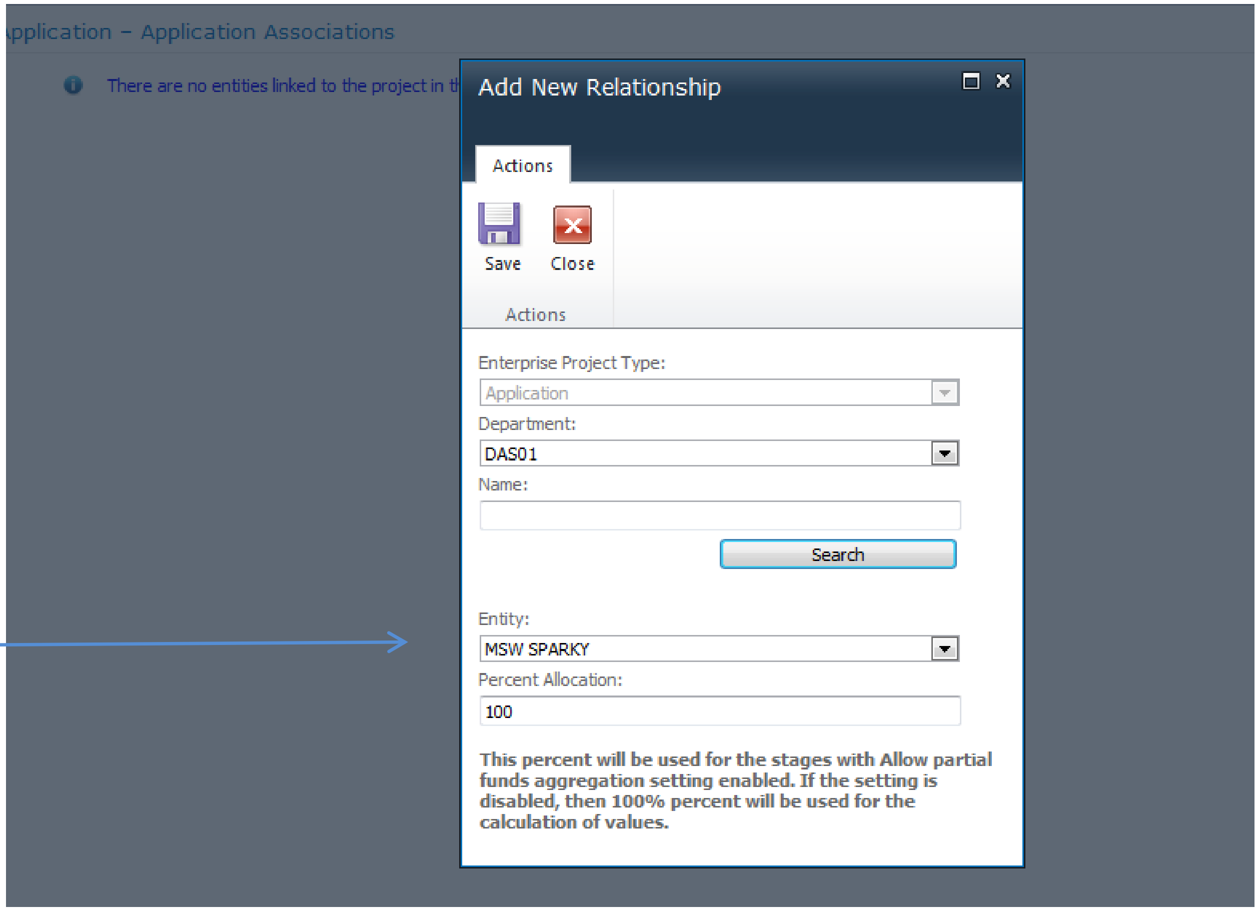
   Note: If the **Allocate To** and **Aggregate From** icons are not enabled, you need to check out the Application. Select the Project tab (above the toolbar) and then select Edit  to check out the Application.

To associate the open Application to a Primary Application

3. Select the **Allocate To** icon.

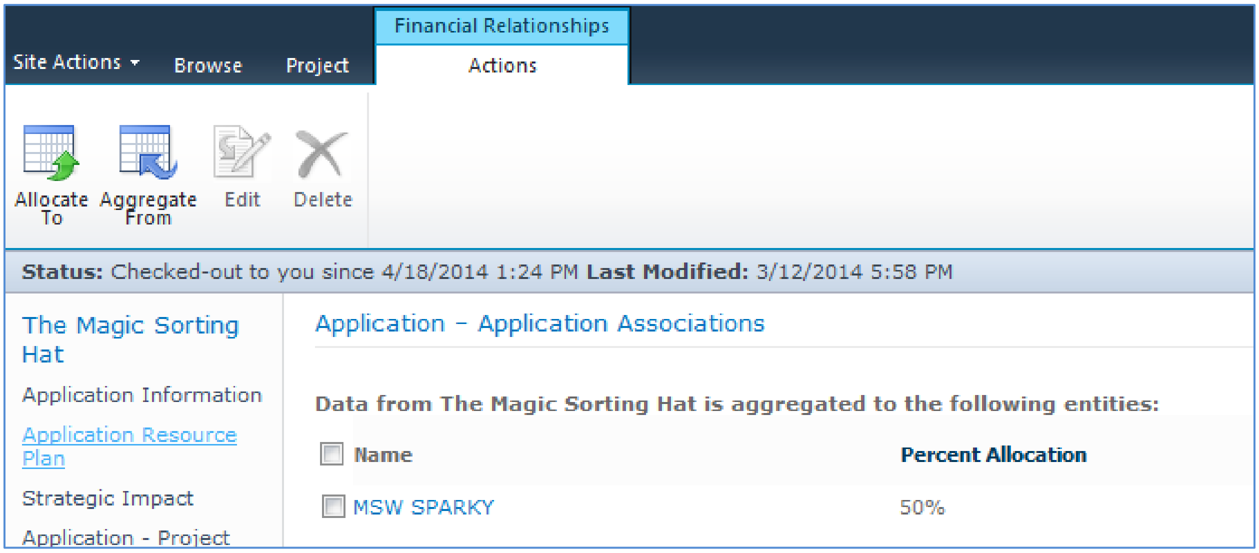
   Result: The system displays the Add New Relationship window.

   Note: The **Enterprise Project Type** field is auto-populated with **Application**. The Department field is auto-populated with your Agency's Agency ID.



4. In the **Entity** field, select the dropdown arrow to display a list of your Agency's Applications. Select the Application that is Primary to the Application you are editing.
5. The **Percent Allocation** field defaults to 100. If the open Application is 100% associated to the Primary Application you selected in the **Entity** field, then leave this field alone. If you wish to lower the allocation %, type over the 100 to enter the appropriate %.
6. Click the Save  button at the top of the window.

   Result: The system displays the Primary Application to which the open Application is associated under the heading "Data from <the name of the open Application> is aggregated to the following entities.

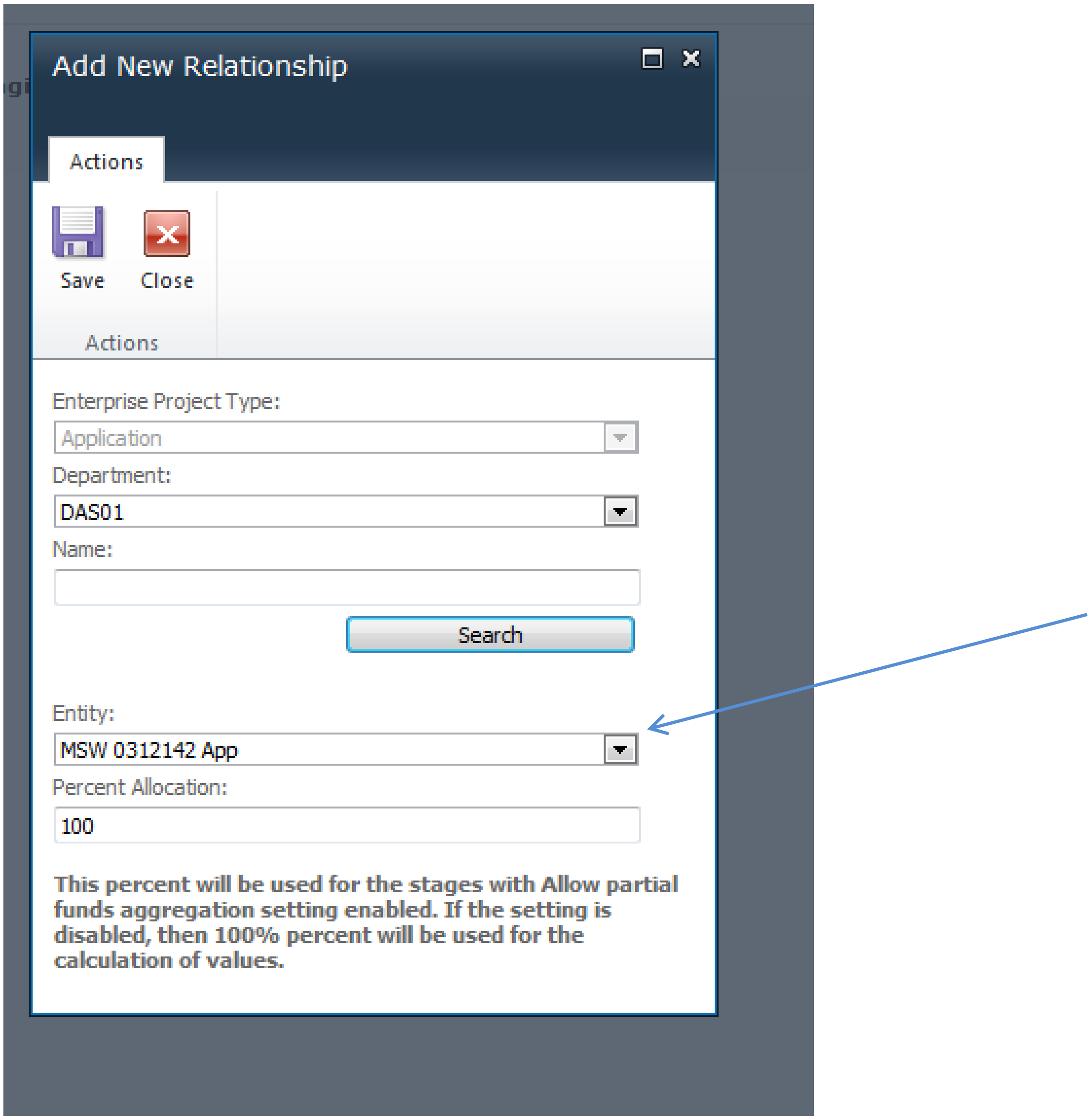


To associate a subordinate Application to the open Application

1. Select the **Aggregate From** icon.

   Result: The system displays the Add New Relationship window.

   Note: The **Enterprise Project Type** field is auto-populated with **Application**. The Department field is auto-populated with your Agency's Agency ID.



2. In the **Entity** field, select the dropdown arrow to display a list of your Agency's Applications. Select the Application that is Subordinate to the Application you are editing.

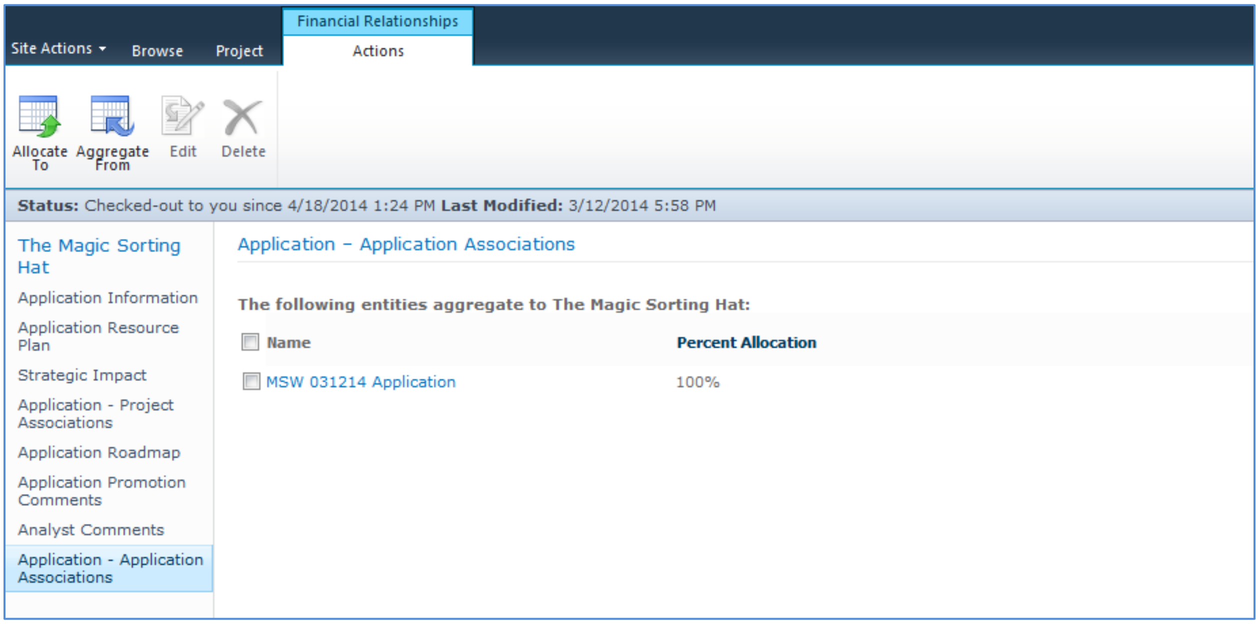
   Note: Make sure that the subordinate Application is not already 100% allocated to another Application. If it is, you must open the subordinate Application and change the %s from there.

3. The **Percent Allocation** field defaults to 100. If the subordinate Application is 100% associated to the open Application, then leave this field alone. If you wish to lower the allocation %, type over the 100 to enter the appropriate %.

4. Click the Save 

 button at the top of the window.

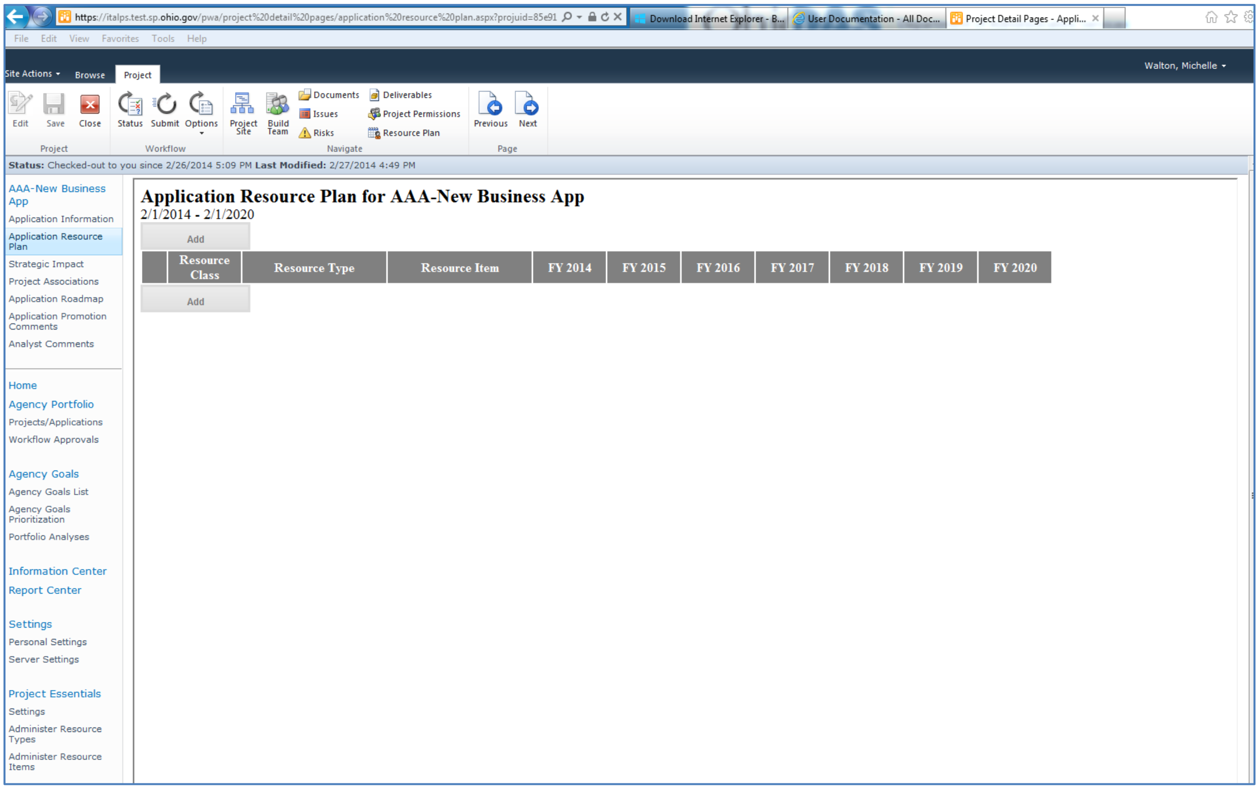
Result: The system displays the subordinate Application under the heading “The following entities aggregate to <the name of the open Application>.



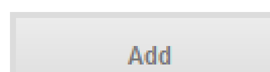
Adding an Application Resource Plan

Open your Application Resource Plan

25. From the Area Navigation Bar, select **Application Resource Plan.**
Result: The Application Resource Plan page displays the **Application Name**, the **Cost Start Date**, the **Cost End Date** and one column for each fiscal year included in the **Cost Start Date** to **Cost End Date** range.

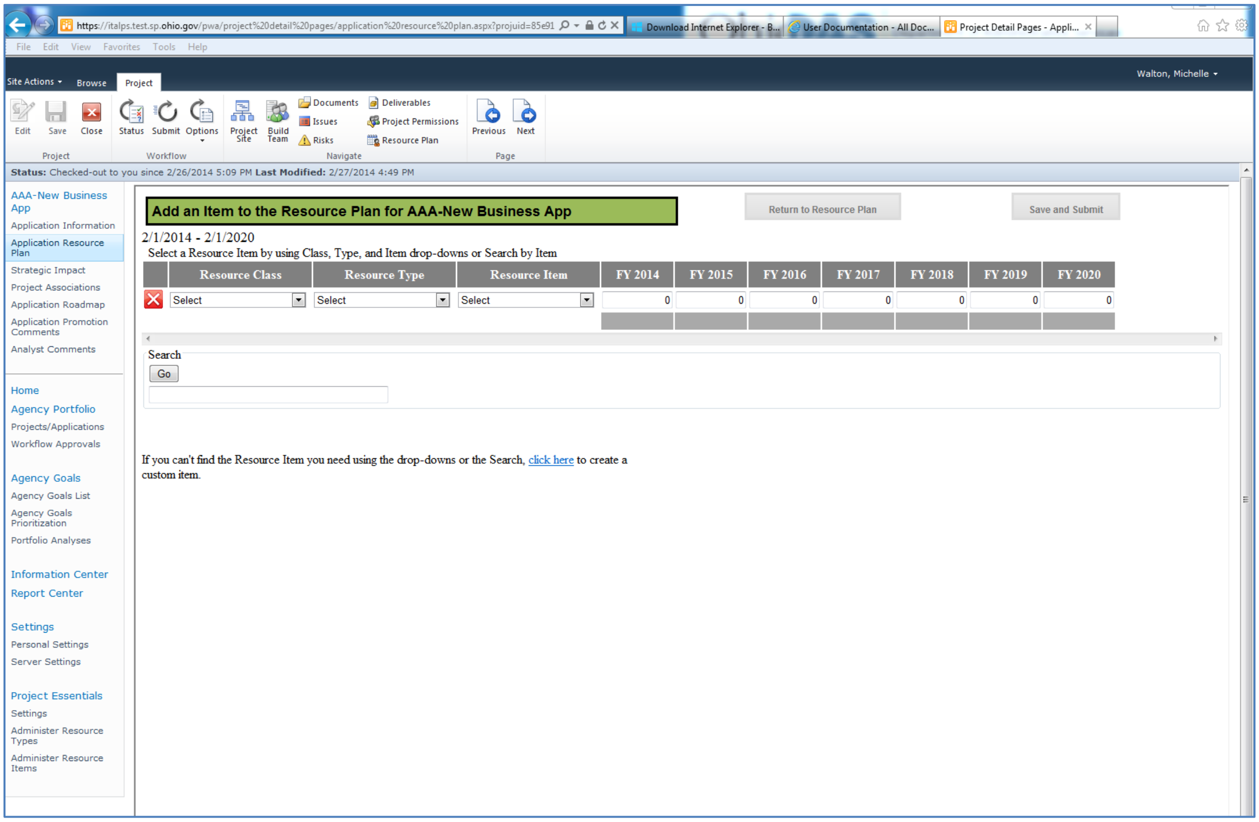


Note: If you have not yet completed the **Cost Start Date** and **Cost End Date** on the Application Information page, the **Application Resource Plan** page will open and display the following message: To enter a Resource Plan, you must first enter valid Cost Start and Cost End Dates.

26. From the **Application Resource Plan** page, click the  button.

Note: The Add button appears twice: at the top and bottom of the page. Because there are no items in your plan when you first enter the page, these buttons appear very close together.

Result: The **Add an Item**… page is displayed.



Add items to your Application Resource Plan

The **Add an Item**… page allows you to plan for the use and quantity of one resource item across the lifecycle of the Application. You can modify these values as plans change for current and future fiscal years. You will always be able to view previous fiscal years if they exist on the Application, but you will not be able to make changes to previous fiscal years.

There are 3 ways to select an item to add to your Resource Plan. This section will walk you through all three.

Select an item from the drop-downs

27. In the **Resource Class** field, click the drop-down arrow.

    Result: The drop-down list displays the available classes: Labor, Software, Hardware and Enterprise Services.

28. Click on your choice from the drop-down list.

Result: The class you selected is displayed in the Resource Class field and the quantity description labels are completed below each fiscal year column. These descriptions vary by class as follows:

When the Resource Class is **Labor:** The quantity is represented by (Full-Time Equivalent) **FTE Months.** In the **FTE Months** field enter the number of labor months you plan to use for this resource during the fiscal year you are building. This number represents the total number of labor months; it is not restricted by the number of people or the duration. For example, an entry of 12 FTE Months can represent any of the following:

a. One full-time person for 1 year
b. 2 full-time people for 6 months each (concurrent or consecutive)
c. ½-time person for 12 months
d. 12 full-time people for one month each (concurrent or consecutive)

You may enter more than 12 months in this field. For example, you might enter 36 months to represent 3 full-time people.

- When the Resource Class is **Software:** The quantity is represented by **Units**.
- When the Resource Class is **Hardware:** The quantity is represented by **Units**. When the Resource Class is **Enterprise Services:** The field label says **Use** and the quantity field changes from an entry field to a check box. This is because services can't be represented by quantities; simply record whether or not you plan to purchase this service during the fiscal year represented by the column.

29. In the **Resource Type** field, click the drop-down arrow.

    Result: The drop-down list displays the available Types in the Resource Class you previously selected. For example, if you selected Resource Class = Labor, the available types displayed will be Internal Labor and External Labor. Grouping the items by Type allows you to drill down to a manageable list of items in the next field.

30. Click on your choice from the drop-down list.

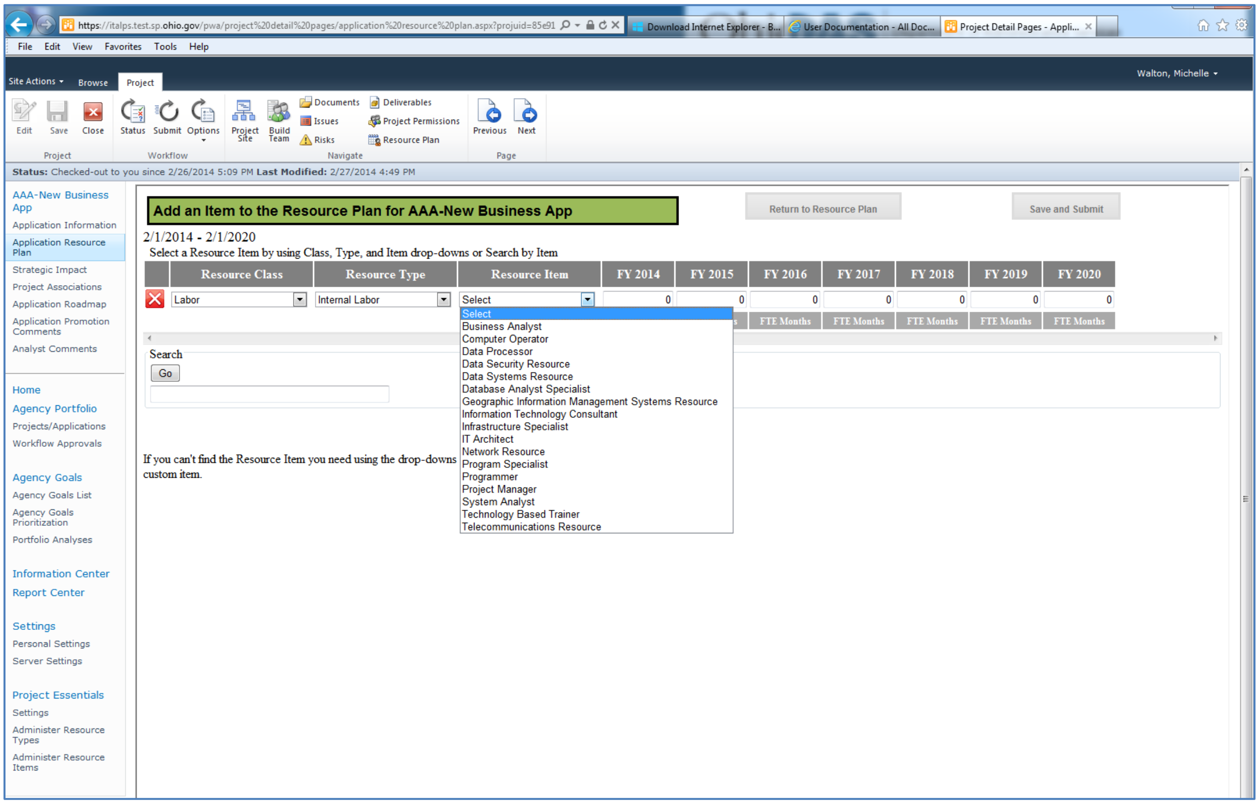
    Result: The type you selected is displayed in the **Resource Type** field.

31. In the **Resource Item** field, click the drop-down arrow.

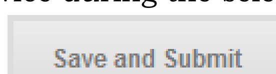
    Result: The drop-down list displays the available items in the Resource Class and Type you previously selected. Items that have already been added to your Resource Plan will not appear in the drop-down.

32. Click on your choice from the drop-down list.

Result: The type you selected is displayed in the Resource Item field.

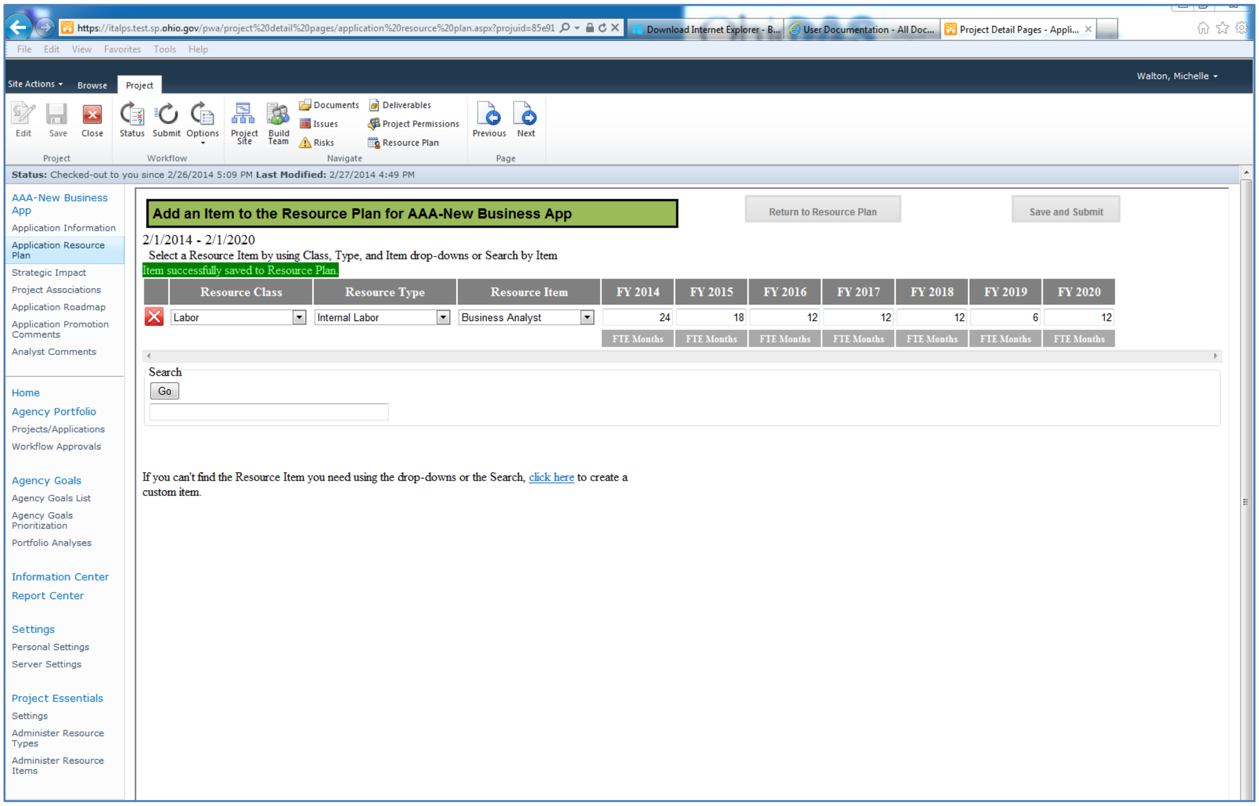


33. In each Fiscal Year column, indicate the quantity of the selected item that you plan to use in that fiscal year. When your item is in the Enterprise Services class, click in the check-box to indicate that you plan to use that service during the selected fiscal year.

34. When you have finished adding this item, click the 

button.

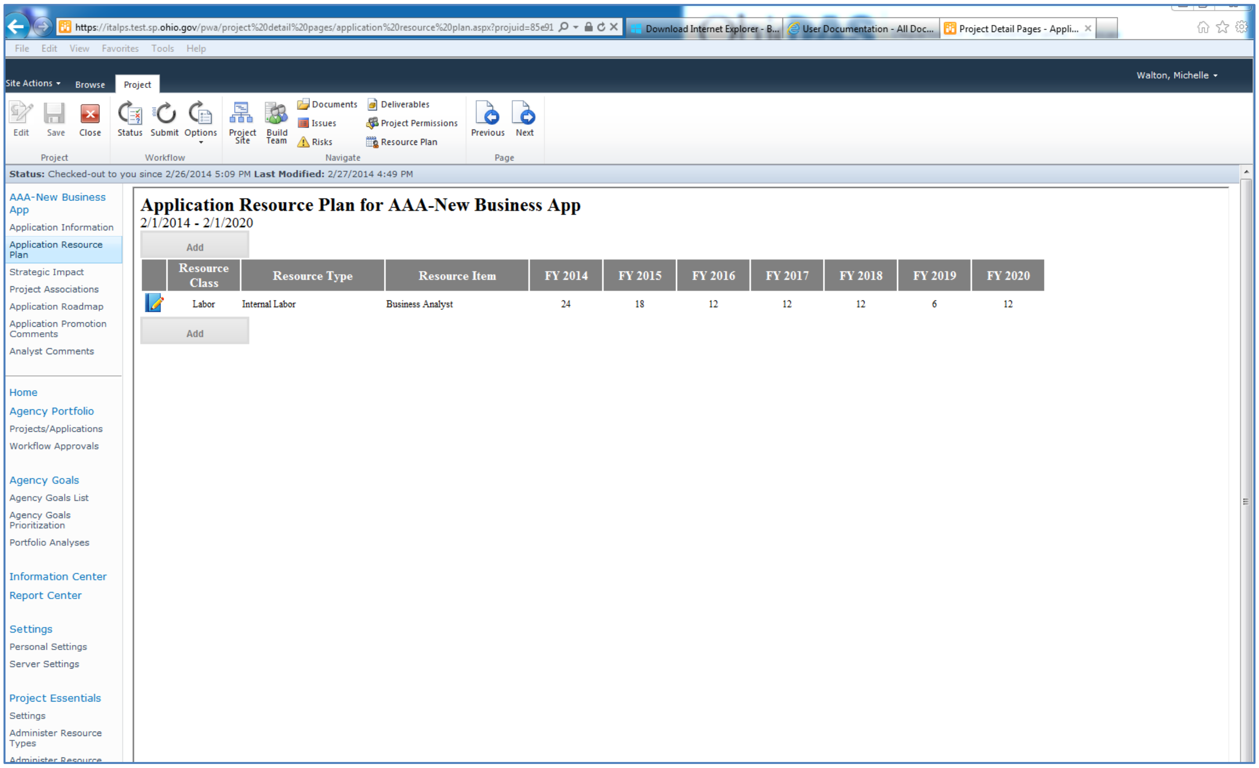
Result: The system displays a confirmation message, highlighted in green.



35. Click the **Return to Resource Plan** button.

Result: The system displays the **Application Resource Plan** page, which now includes the item you just added.

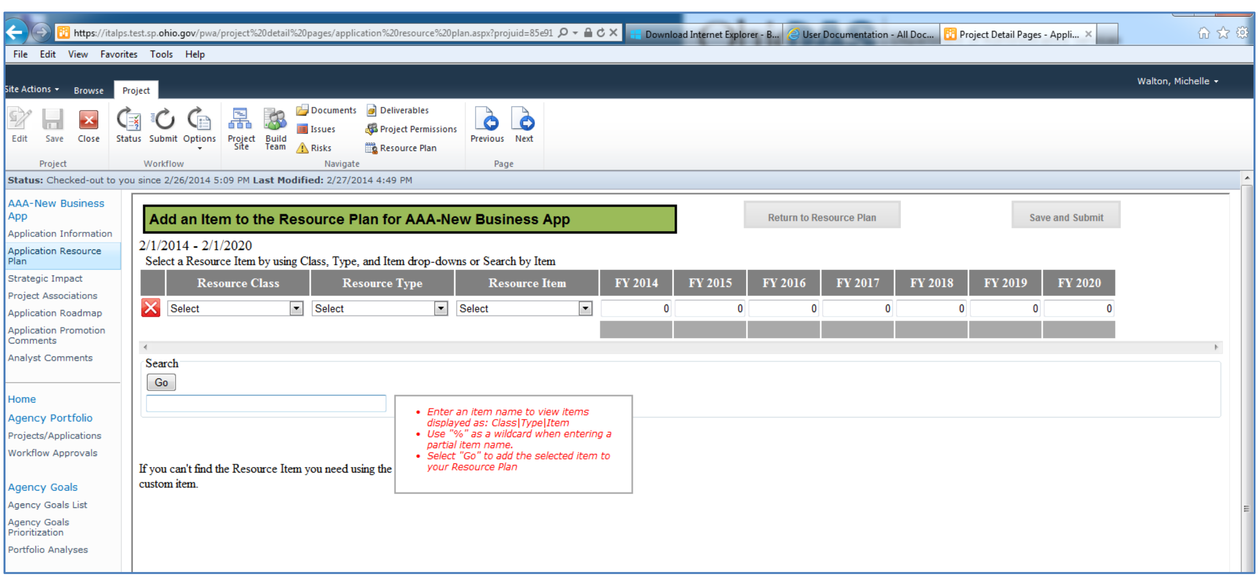
Caution: You **must** return to the main **Application Resource Plan** page after adding each item.



Select an item from the Search box

If you do not know the Resource Class of the item you wish to add, or if you prefer not to use the drop-downs, you may also add items using the search functionality.

36. From the **Add an Item…** page, hover your cursor over the text entry box in the Search section.

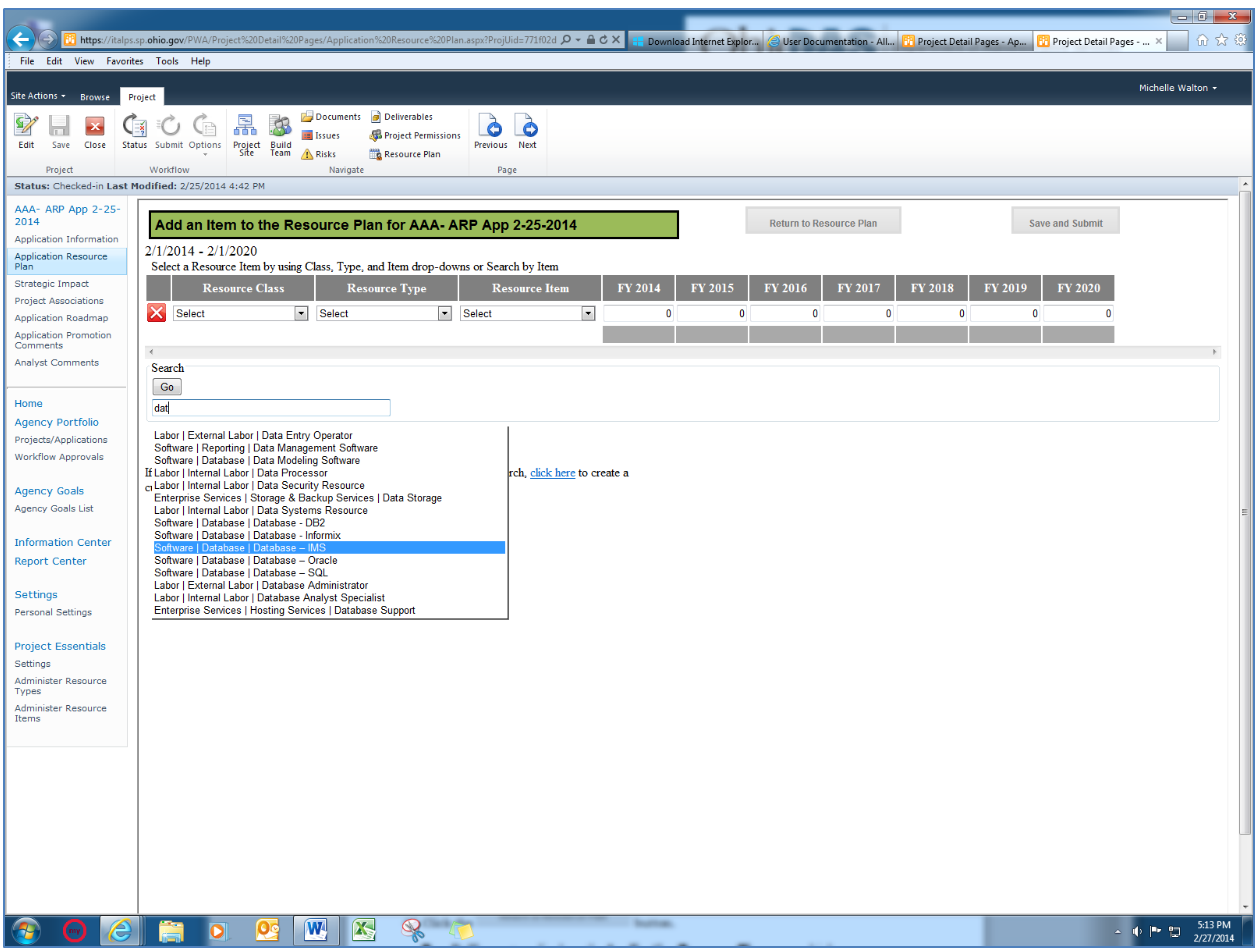


Result: The system displays instructions about how to use the search:

- Enter an item name to view items displayed as Class|Type|Item
- Use "%" as a wildcard when entering a partial item name
- Select "Go" to add the selected item to your Resource Plan.

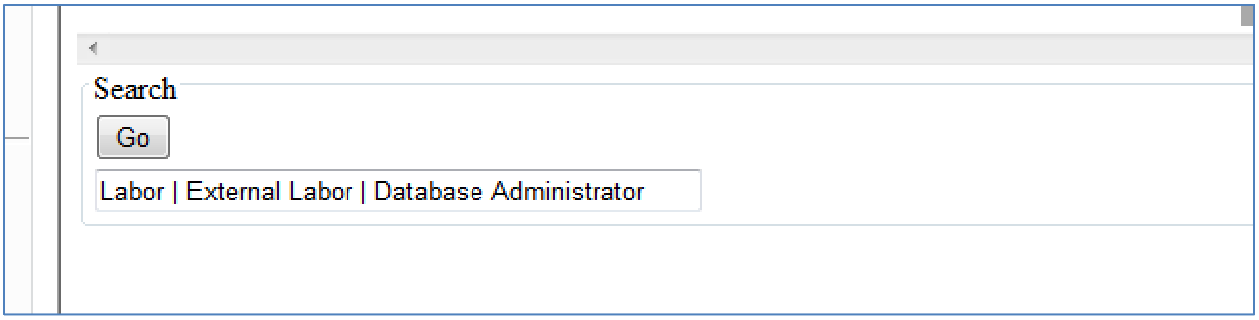
37. In the text entry box, begin typing the name of the Resource Item you wish to add.

Result: The system displays items in the following format: **Resource Class|Resource Type|Resource Item**. Although the Class and Type are displayed, the system is searching only on the **Resource Type**. This will allow you to see if an item is available in more than one Class and Type, allowing you to select the one appropriate for you Application Resource Plan. As you continue to type, the system adds or removes items from the display to match your search criteria.



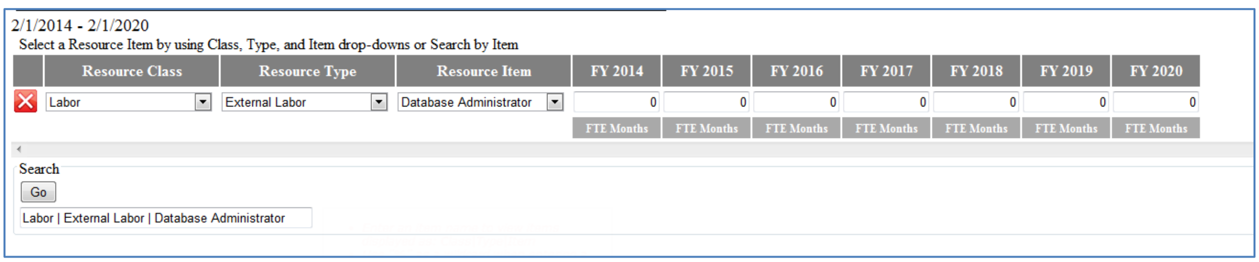
38. When you see the item you wish to select, click on it.

Result: The system displays the **Resource Class|Resource Type|Resource Item** you selected in the text entry box.



39. Verify that the system is displaying the item you want, then click Go.

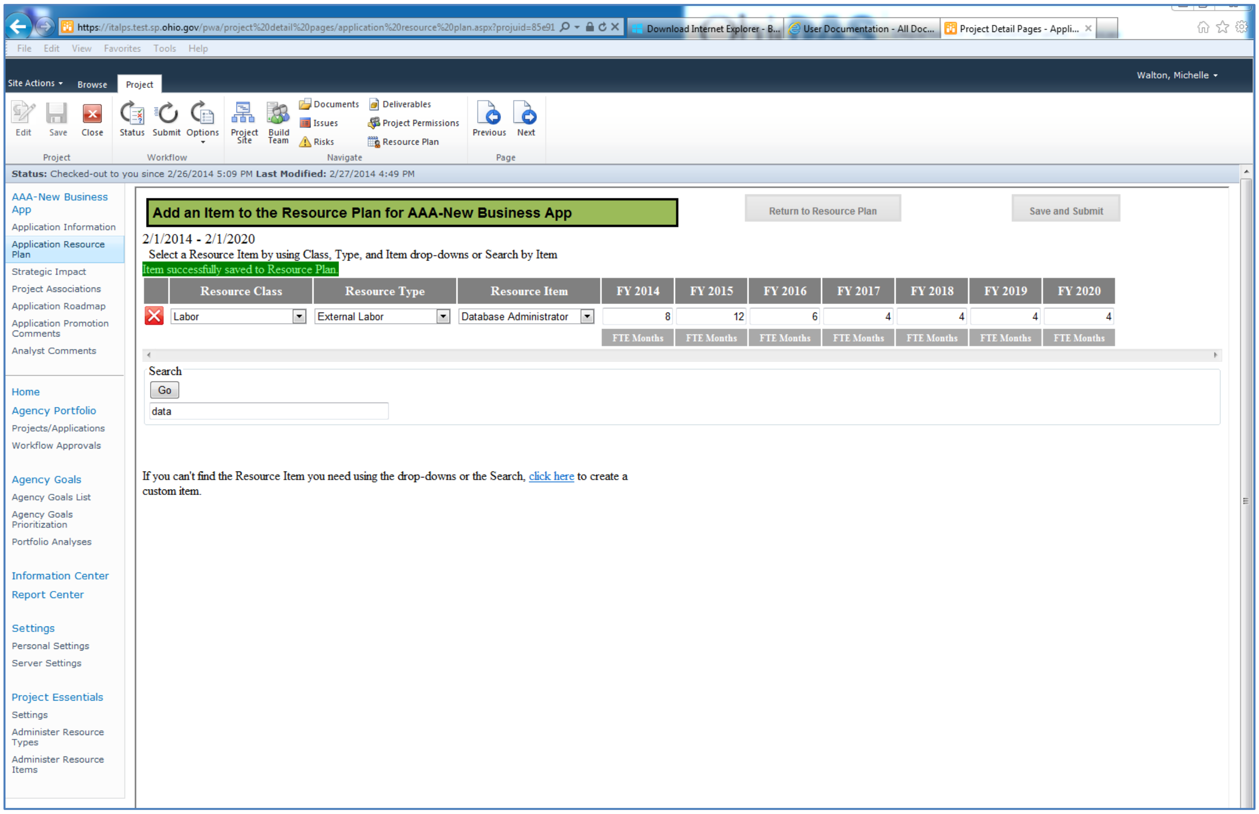
Result: The system displays the **Resource Class|Resource Type|Resource Item** you selected in the corresponding drop-down columns above.



40. In each Fiscal Year column, indicate the quantity of the selected item that you plan to use in that fiscal year. When your item is in the Enterprise Services class, click in the check-box to indicate that you plan to use that service during the selected fiscal year.

41. When you have finished adding this item, click the Save and Submit button.

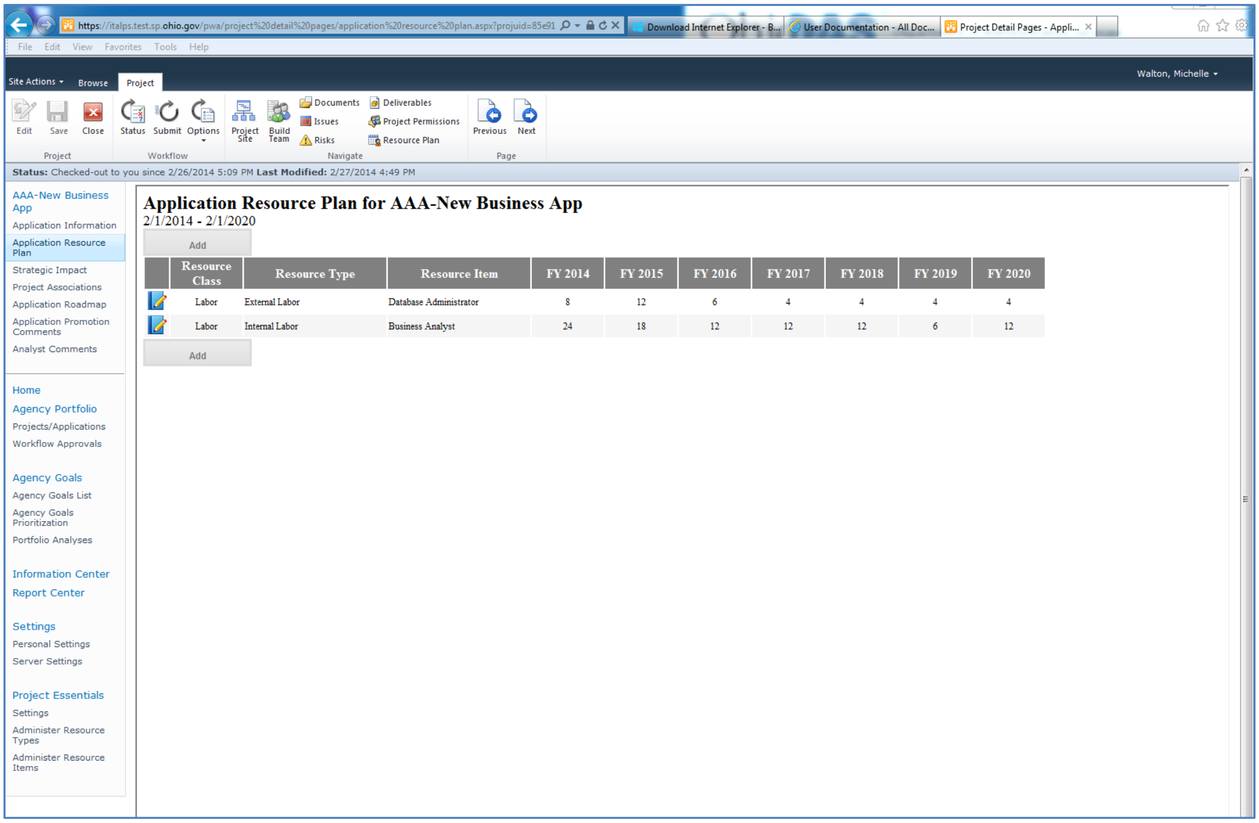
Result: The system displays a confirmation message, highlighted in green.



42. Click the **Return to Resource Plan** button.

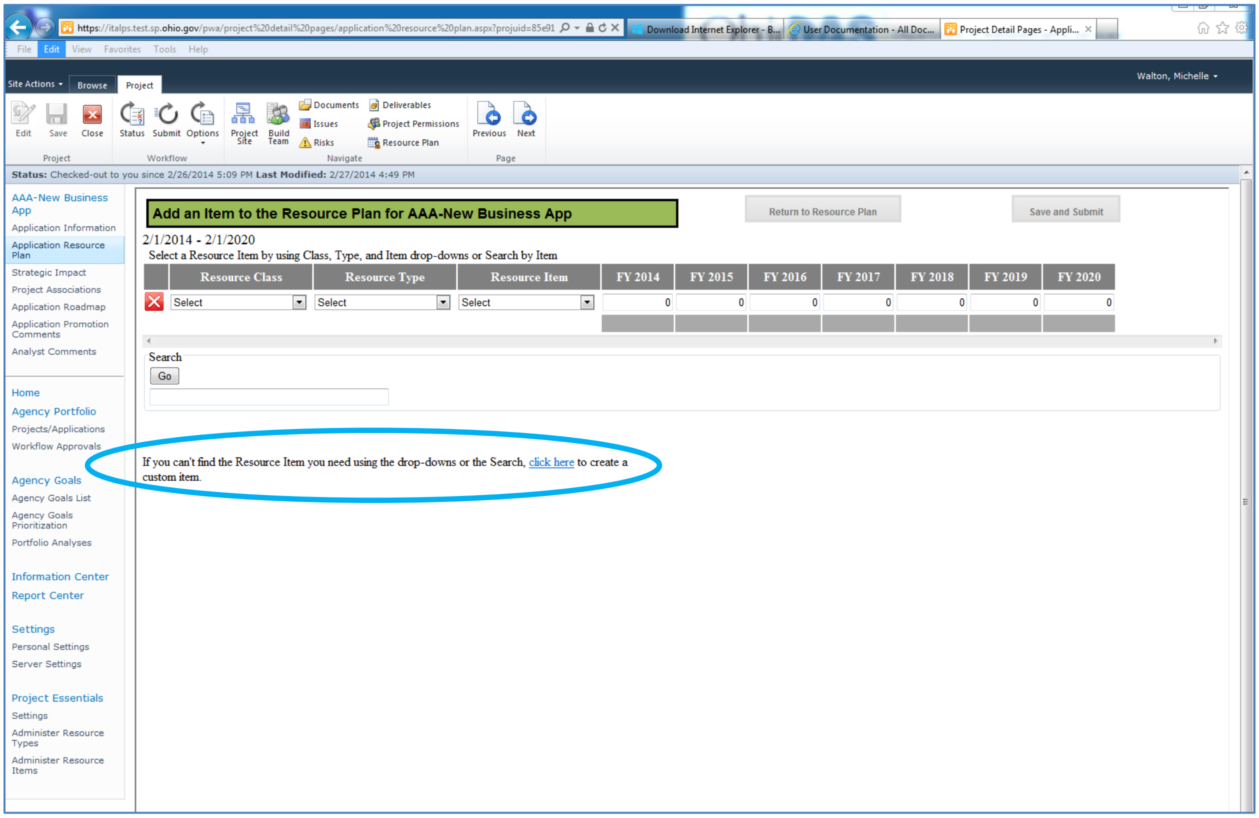
Result: The system displays the **Application Resource Plan** page, which now includes the item you just added.

Caution: You **must** return to the main **Application Resource Plan** page after adding each item.



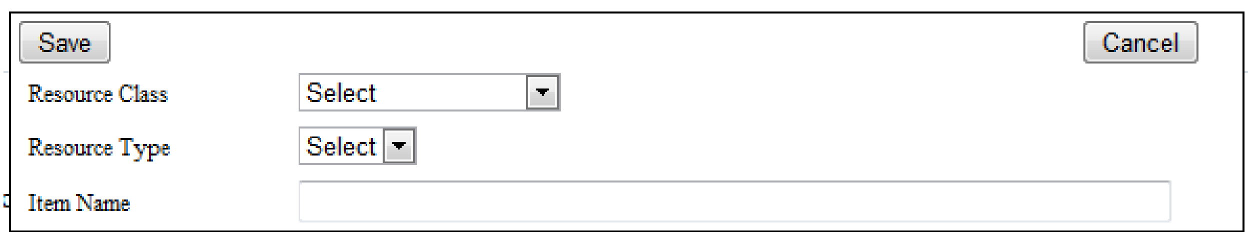
Add a custom item

In the event that you cannot locate an item you need for your Resource Plan, you can add a custom item to the Labor, Software or Hardware class. Do not enter a custom item in the Enterprise Services Class, as you may only use Enterprise Services that are offered by OIT. If you plan to use an outside service, select that item under the appropriate Class. A custom item will be saved only to this Resource Plan. You may also use the custom item as a place holder, that is, you may add it now and later delete it and replace it with an item selected from the Resource Table.



43. From the **Add an Item…** page, click on the click here link.

Result: The system displays a pop-up box.



44. In the **Resource Class** field in the pop-up, click the drop-down arrow.

Result: The drop-down list displays the available classes: Labor, Software, Hardware and Enterprise Services.

45. Click on your choice from the drop-down list.

Result: The class you selected is displayed in the Resource Class field of the pop-up.

46. In the **Resource Type** field in the pop-up, click the drop-down arrow.

    Result: The drop-down list displays the available Types in the Resource Class you previously selected. For example, if you selected Resource Class = Labor, the available types displayed will be Internal Labor and External Labor.

47. Click on your choice from the drop-down list.

    Result: The type you selected is displayed in the **Resource Type** field of the pop-up.

48. In the **Item Name** field, enter the name of your custom item.
49. Click the Save button.

    Result: The system displays the **Resource Class** and **Resource Type** you selected and the **Resource Item** you entered in the corresponding drop-down columns above.

50. In each Fiscal Year column, indicate the quantity of the selected item that you plan to use in that fiscal year. When your item is in the Enterprise Services class, click in the check-box to indicate that you plan to use that service during the selected fiscal year.
51. When you have finished adding this item, click the Save and Submit button.

    Result: The system displays a confirmation message, highlighted in green.

52. Click the Return to Resource Plan button.

    Result: The system displays the **Application Resource Plan** page, which now includes the item you just added.

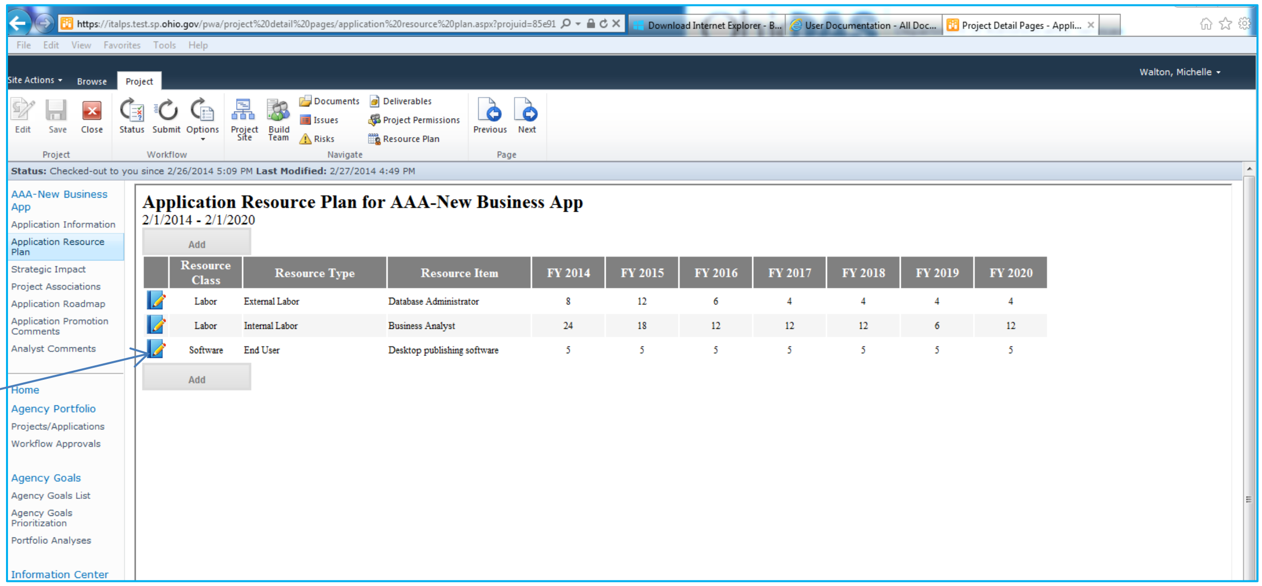
    Caution: You **must** return to the main **Application Resource Plan** page after adding each item.

Edit or delete an existing item in your Resource Plan

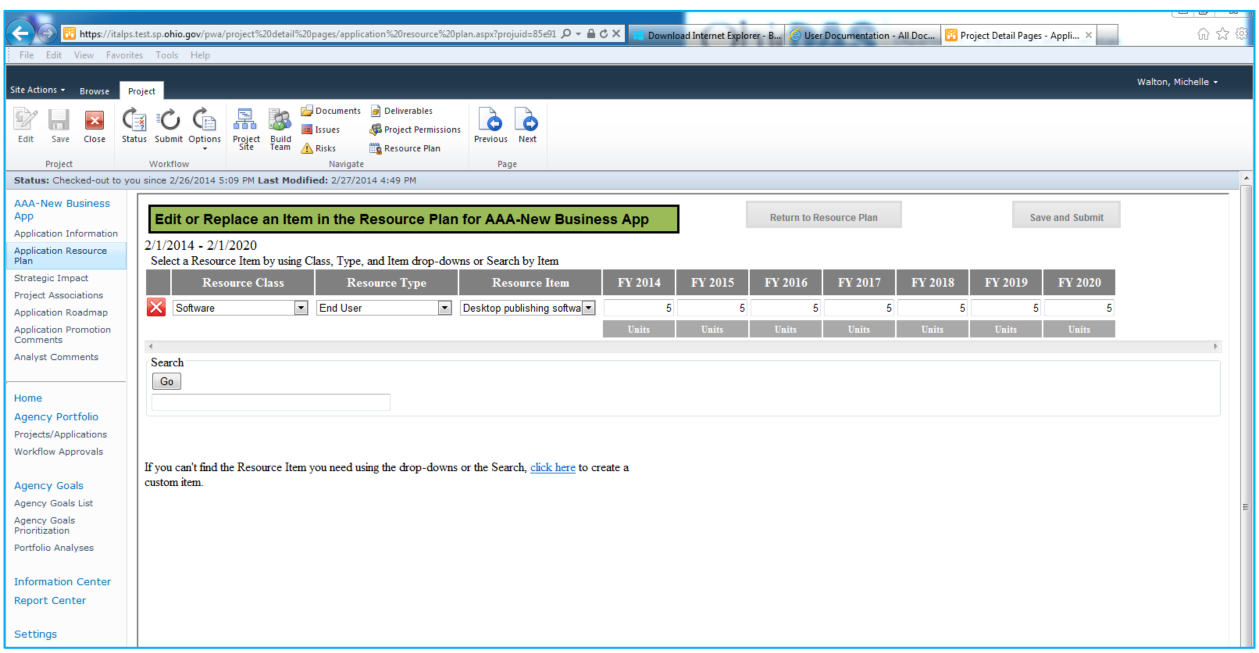
While building your Application Resource Plan or later as your plans change and grow, you may edit the Application Resource Plan.

You can add or decrease the quantity of any item in your plan in the current or future fiscal years. Once a fiscal year is in the past, you may view the quantity, but you may not change it.

You may also remove an item completely from your Resource Plan as long as it does not have any quantities in past fiscal years.



53. From the **Application Resource Plan** page, click the  button on the line item that you wish to change or delete.
Result: The **Edit or Replace an Item in the Resource Plan…** page displays the item you selected with its existing values. From here you may either delete or edit the item.



To delete the item

54. Click the button to delete the item from the Resource Plan.

    Result: The system displays a dialog box verifying that you want to delete the item.

    Note: If the selected item had an entry in a fiscal year that is now in the past, you cannot delete the item. In this case, enter 0 in the quantity for the current and future fiscal years (or uncheck the Use box if it is an Enterprise Services item.)

55. Click the OK button in the dialog box to confirm the deletion.

    Result: The system deletes the item and returns you to the **Application Resource Plan** page.

To edit the item

56. To edit the item, change the quantities (or check / uncheck **Use** boxes in the fiscal year columns.

57. When you have finished editing this item, click the Save and Submit button.

    Result: The system displays a confirmation message, highlighted in green.

    Caution: Do not select a new Resource Class, Resource Type or Resource Item from the drop-downs. If you do, you will delete the existing item and replace it with the new selection. The quantities will from your old item will remain unless you edit them as well. If you actually want to replace an item, the recommended practice is to delete the item you don't want, and add the new item.

58. Click the Return to Resource Plan button.

    Result: The system displays the **Application Resource Plan** page, which now includes changes you just made.

    Caution: You **must** return to the main **Application Resource Plan** page after adding each item.

You have now entered all the available application information. You can now promote your application within the application lifecycle.

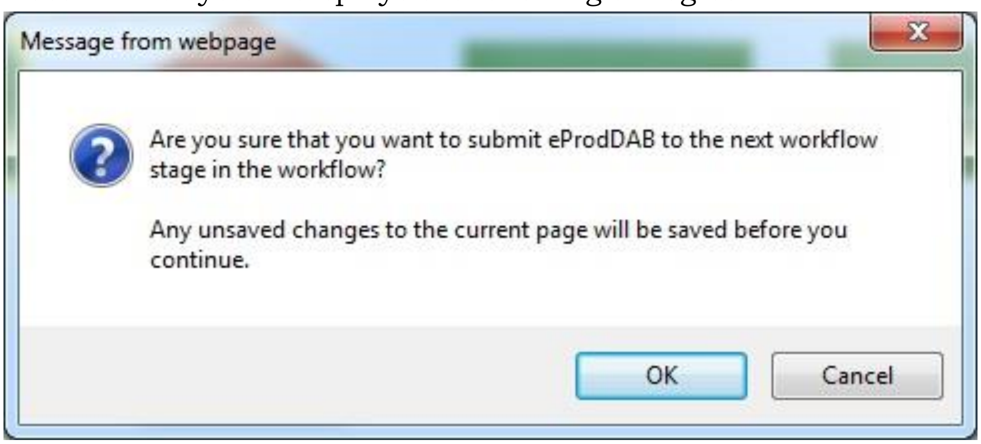
Setting the Lifecycle Stage for an Application

After you have added information about your application, you are ready to identify the lifecycle stage of the application.

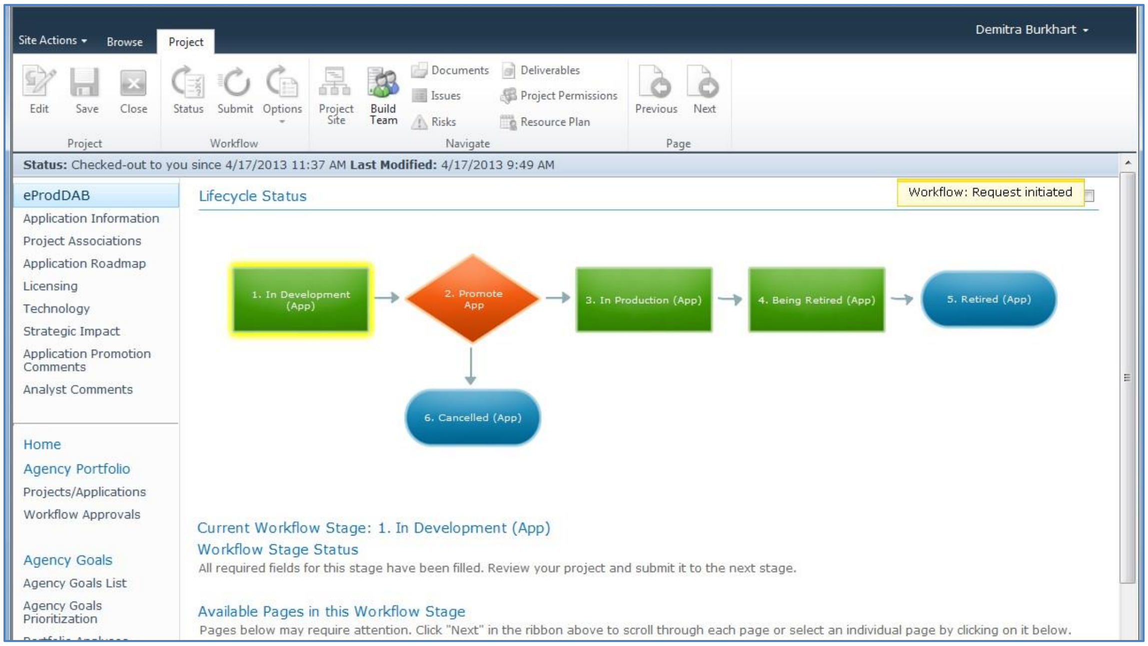
IT ALPS supports five application lifecycle stages, as described in the table below.

Lifecycle Stage	Description
In Development	Specifies the first stage in the application's lifecycle, the design stage. Requirements are gathered, code is written, and testing is performed. Projects that support this stage of the lifecycle are referred to as *Investment* projects.
In Production	The application passes customer acceptance and is placed into the production environment. Projects that support this stage may be *Enhancements*, routine *Maintenance and Operations*, or *Administrative* projects.
Being Retired	The application is scheduled to be removed from the production environment possibly because the business has grown or the software no longer meets the customer's needs. Projects that support this stage may be *Sunset* projects.
Retired	The application is removed from the production environment. Activities for the application focus on migrating data from the retiring application and shutting it down. Projects that support this stage may be *Administrative* projects.
Cancelled	The work stops. The project was dedicated to the development of a new application, however, plans changed and the application is cancelled. Projects related to the application must also be in a cancelled state.

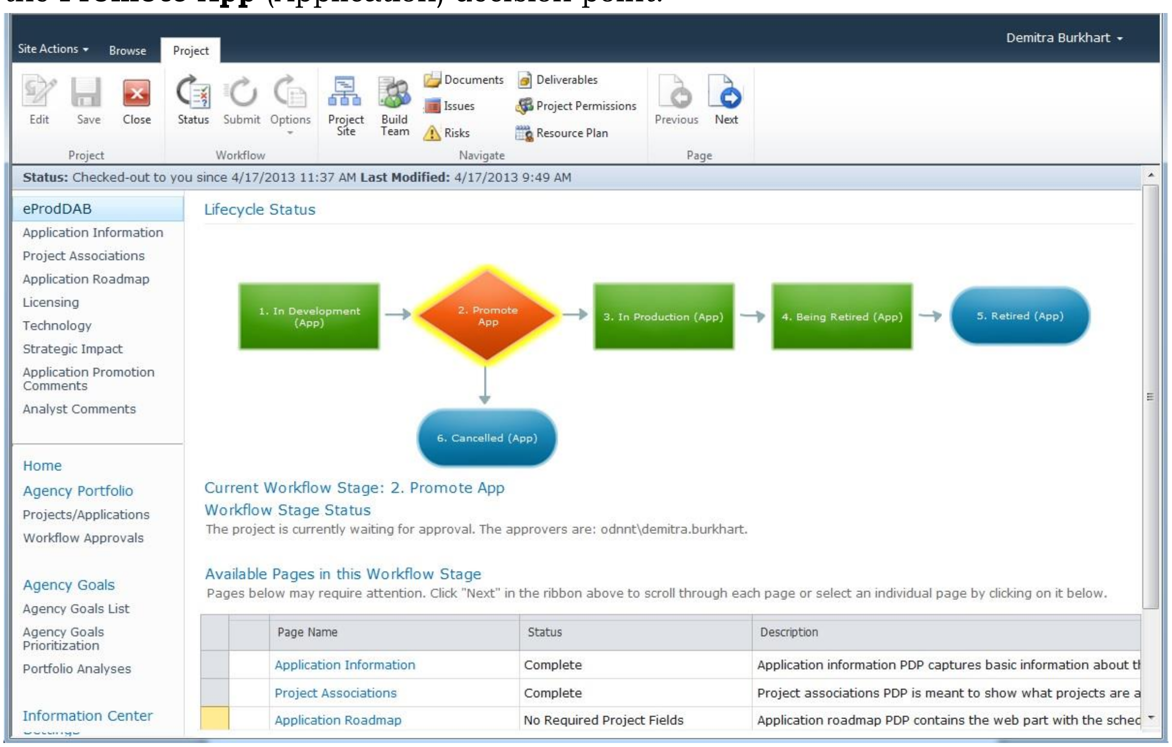
1. From the **Application Lifecycle Status** page, on the toolbar, select **Submit** .
   Result: The system displays the following dialog box.



2. Click **OK**.
   Result: The system initiates a simple workflow approval process.

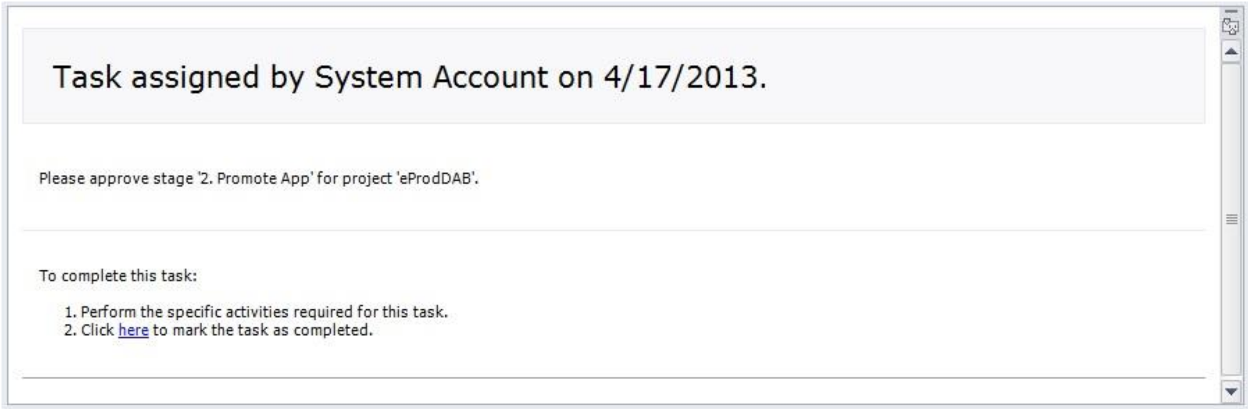


The system refreshes the **Application Lifecycle Status** page and now highlights the **Promote App** (Application) decision point.

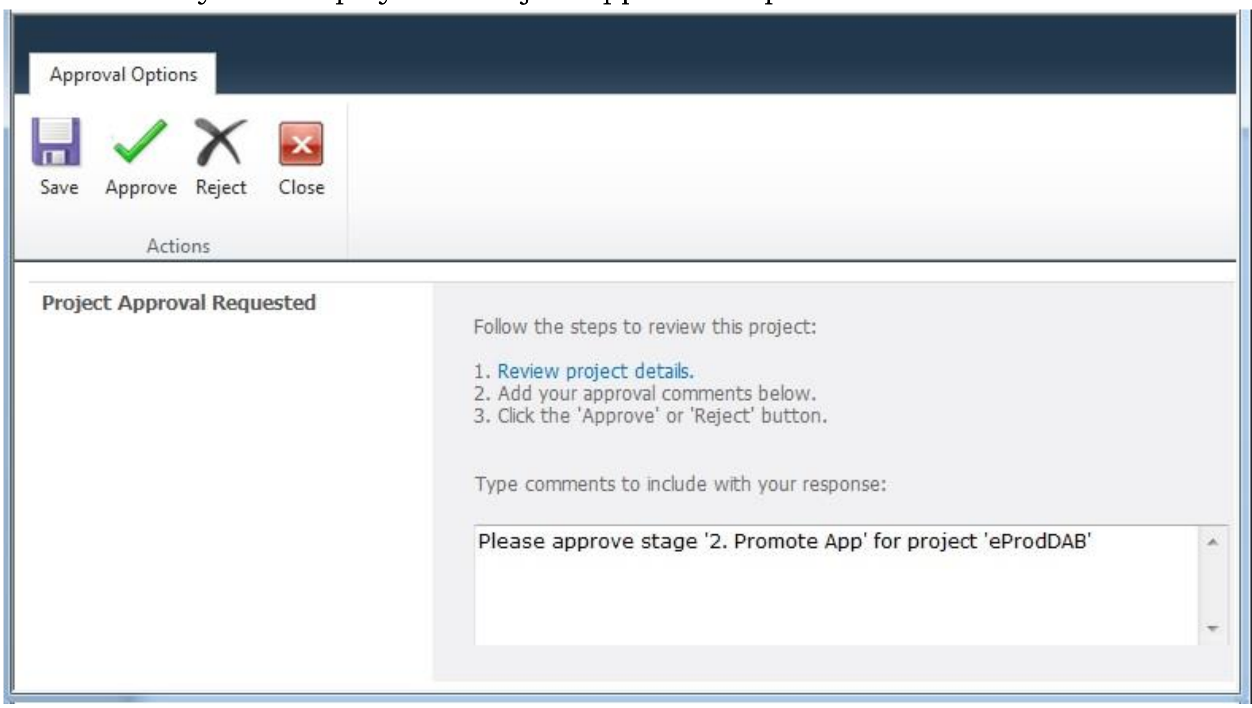


The system generates and sends the Agency Approver an email.

3. If you are the Agency Approver, go to your email and open the message from the SharePoint administrator.

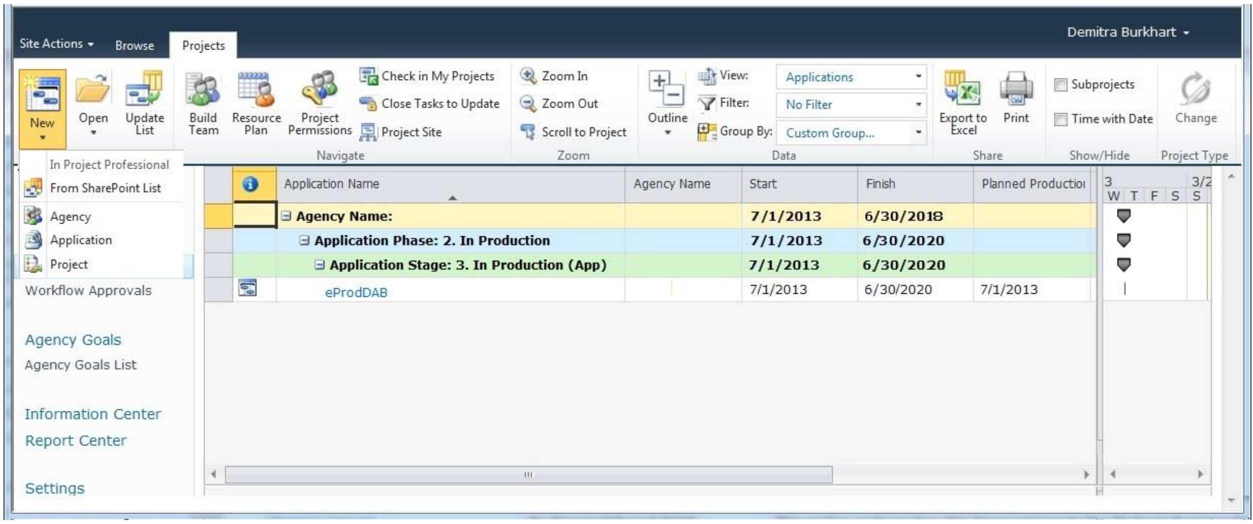


4. Click the link in step 2 of the email message.
Result: The system displays the Project Approval Requested window.

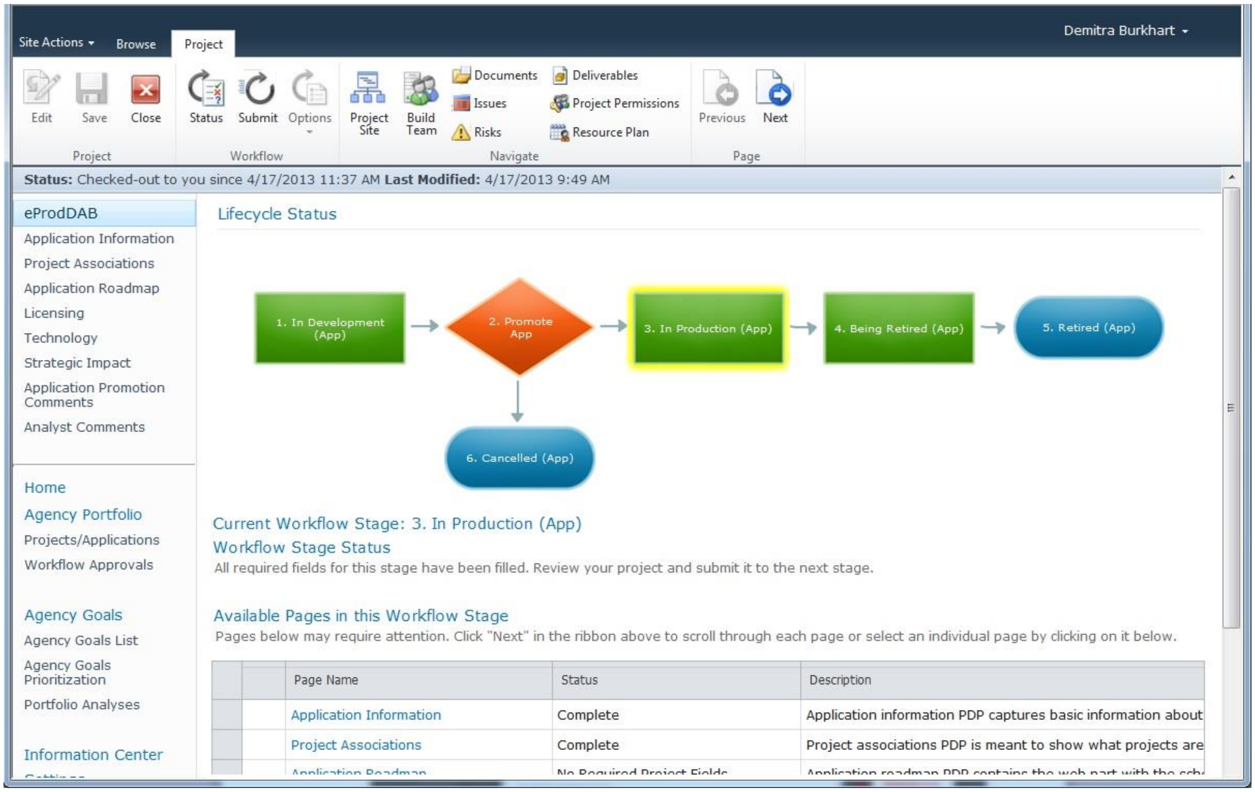


5. Click **Approve** ✓ to approve the request.
Note: Agency Approvers can also click on "Review project details" to access the application's information.
Result: The system closes the Project Approval Requested window and navigates back to the Application Work Center page. The application displays a status of **In**

Production.

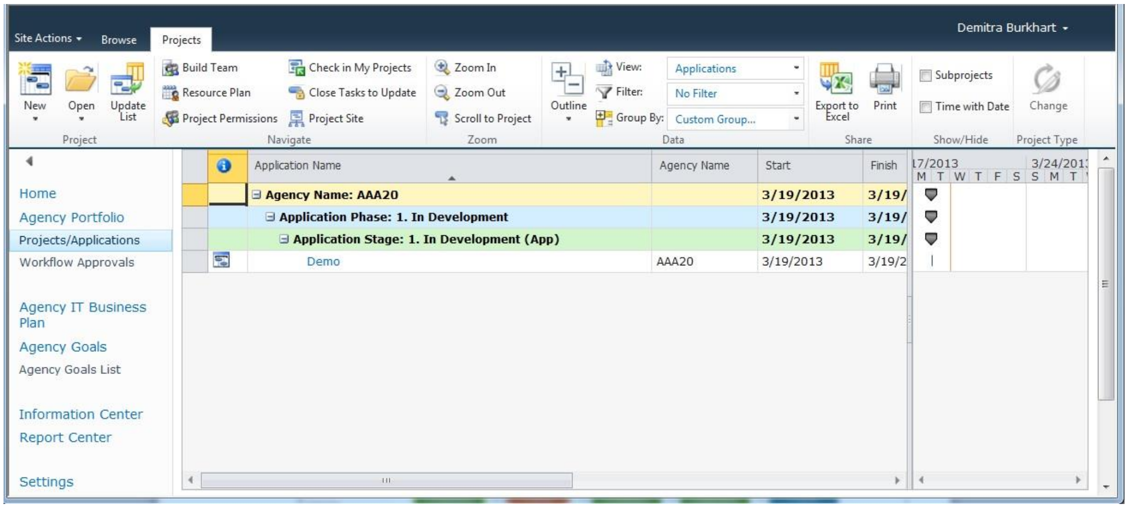

Site Actions
Browse
Projects
Demitra Burkhart
New
Open
Update List
Build Team
Resource Plan
Project Permissions
Check in My Projects
Close Tasks to Update
Project Site
Navigate
Zoom In
Zoom Out
Scroll to Project
Zoom
Outline
View: Applications
Filter: No Filter
Group By: Custom Group...
Data
Export to Excel
Print
Share
Subprojects
Time with Date
Show/Hide
Change
Project Type
In Project Professional
From SharePoint List
Agency
Application
Project
Workflow Approvals
Agency Goals
Agency Goals List
Information Center
Report Center
Settings
Application Name
Agency Name
Start
Finish
Planned Productio
Agency Name:
7/1/2013
6/30/2018
Application Phase: 2. In Production
7/1/2013
6/30/2020
Application Stage: 3. In Production (App)
7/1/2013
6/30/2020
eProdDAB
7/1/2013
6/30/2020
7/1/2013

6. From the agency work center, click on the name of the application.
   Result: The system displays the **Application Lifecycle Status** page. **In Production** is highlighted.



7. On the toolbar, click **Close** to check in the application.
   Result: The system displays a dialog box prompting you to check in.

8. Click **Yes** to check in the file.
   Result: The system processes the request and displays a confirmation message. The system closes the **Application Lifecycle Status** page and returns to the application work center page.



Managing Your Agency's Project Portfolio

An Agency's applications are supported by groups of projects. Projects represent the costs of the application and are divided into spend types. With the exception of Administrative projects, projects should be associated to an application. This enables the Agency to have full visibility into the cost of running the application, from development to maintenance to retirement.

This section steps you through adding a project, creating a project estimate, associating a project to an application, and moving a project through the project lifecycle.

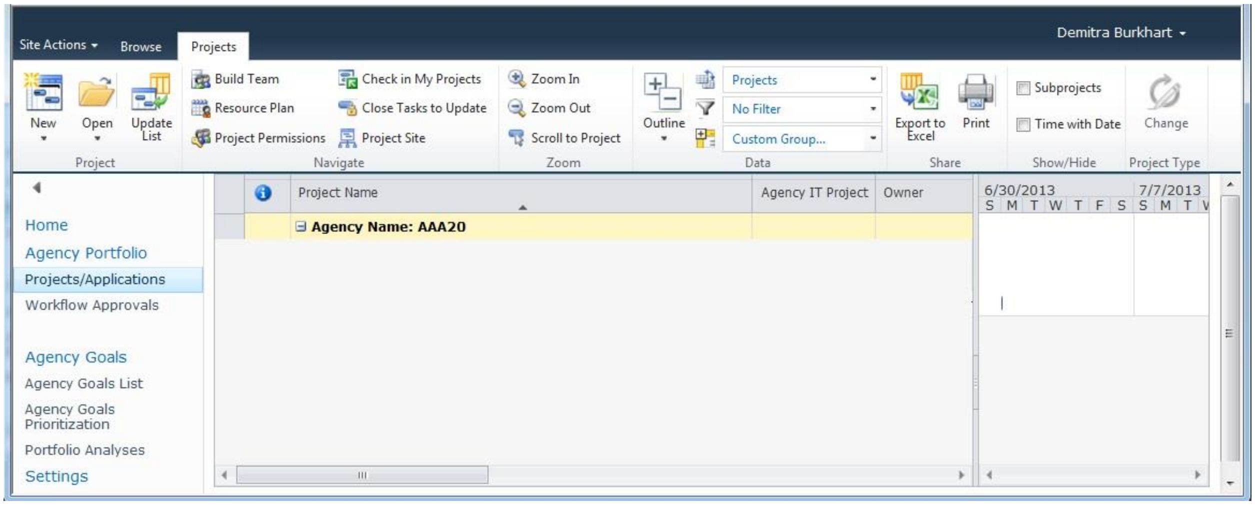
Adding a Project

This section steps you through adding a project, including entering an estimated budget, submitting the project for approval to execute, and identifying key pieces of information about the project, including:

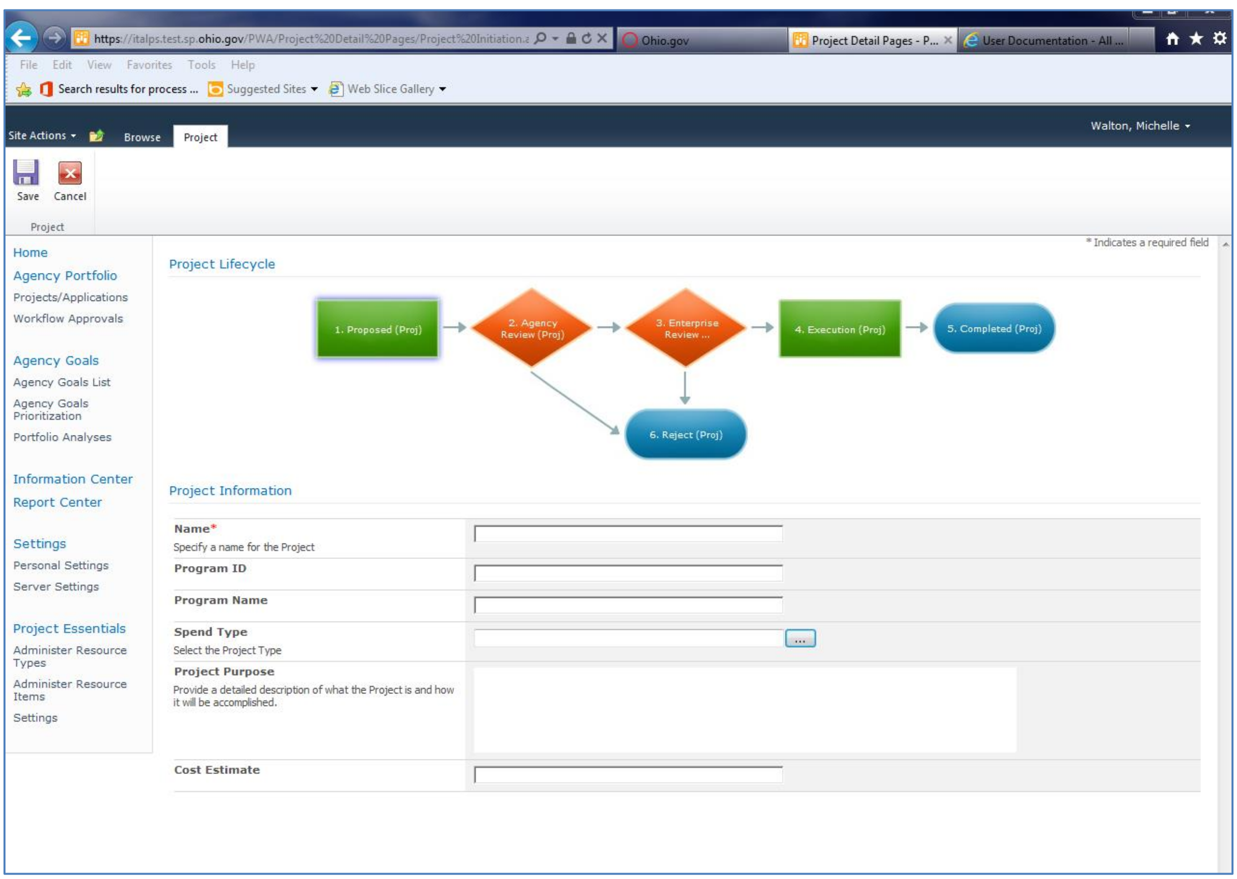
- Project Information—identify cost start and end dates, business justification, and collaboration efforts with other agencies
- Project Planned Value—including an estimate of the cost for personnel (labor), hardware, software, and Enterprise Services resources needed to execute the project
- Application Associations—identify the application(s) the project is supporting and assign a percentage to reflect the amount of support the project will provide
- Estimate at Completion—an optional opportunity to identify a more defined budget after the budget is in the Execution lifecycle stage.

1. From the IT ALPS home page, click **Manage Agency Portfolio**.
   Result: The system displays the work center page.

2. On the toolbar, click the **View** drop-down list, and select **Projects**.
   Result: The system displays the Project Work Center.



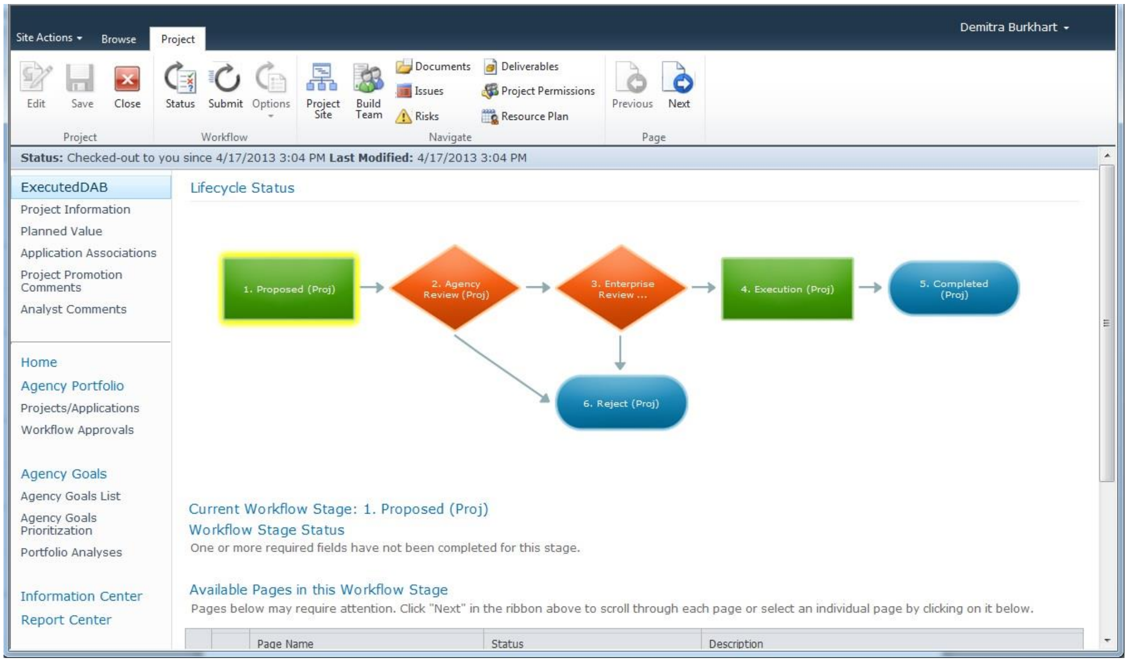
3. On the toolbar, click the **New**  drop-down list, and select **Project**.
   Result: The system displays the **Project Lifecycle** page and a sub-set of the fields on the Project Information page.



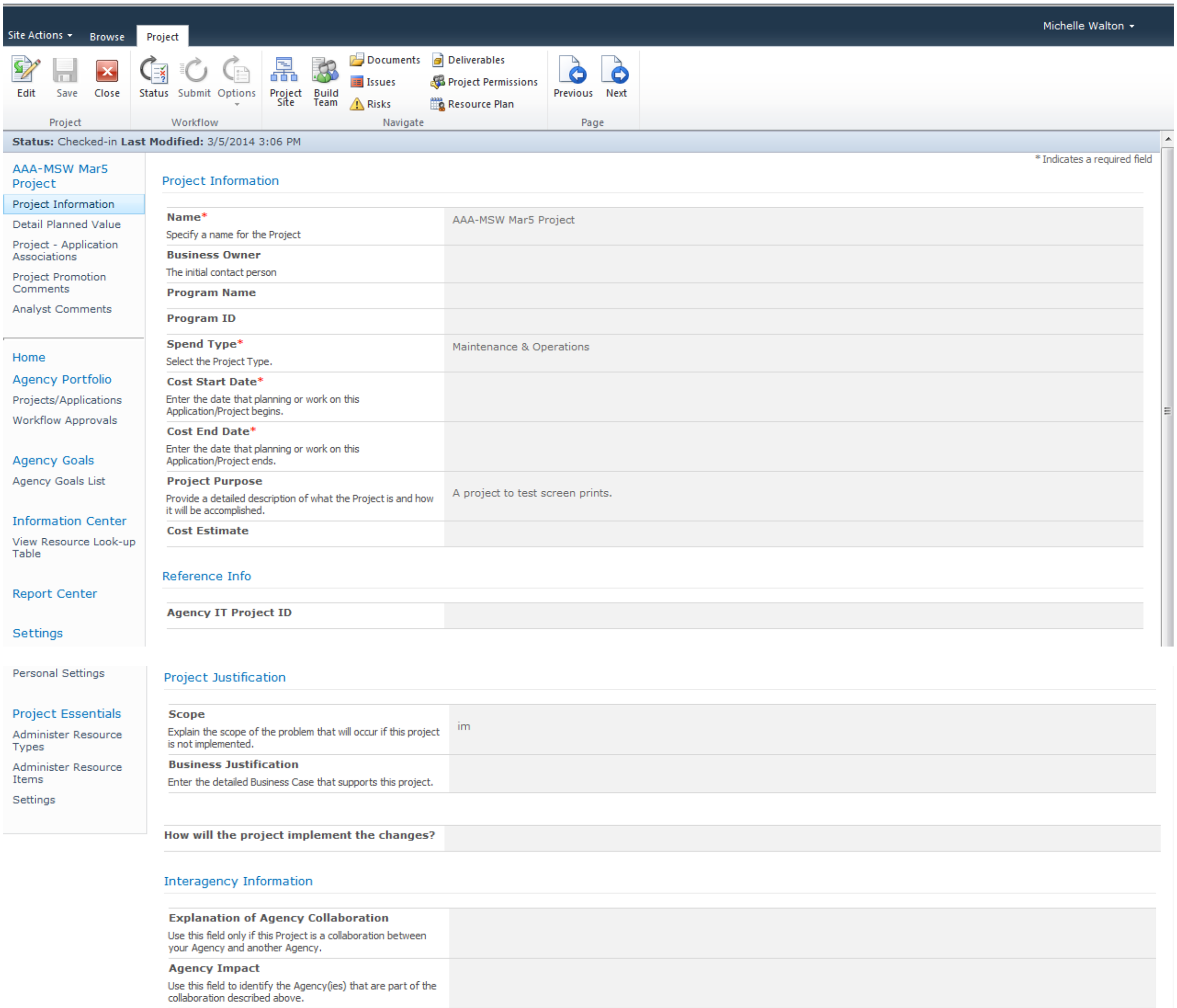
4. In the **Name** field, enter the name of your name of your project using the convention below:
   XXX-ProjectName, where XXX equals the agency's three letter OAKSID. A dash (-) should be entered between the OAKSID and the project name.
   Note: Project names must be unique. For maintenance and operations projects which only represent one fiscal year, it is recommended that FYNN be added to the end of the project name, where NN = the number of the fiscal year.
5. In the **Program ID** field, enter the OAKS program identification number to which the project is related.
6. In the **Program Name** field, enter the OAKS program name to which the project is related.
7. In the **Spend Type** field, click the [...] icon and select the appropriate project type from the drop-down list.
   CAUTION: Do not press the Backspace key in this field. Doing so will cause the values in the drop down lists on the screen to no longer display. If this inadvertently occurs, press F5 to refresh the page. The values should reappear.
   Note: The spend type relates directly to the lifecycle stage of the applications.
   - **Investment**—Projects that are for applications in development stage of the application lifecycle. For example, projects that are funds related to planning, architecture, requirements development, and infrastructure stand up.
   - **Enhancement**—Projects that support applications in production. For example, projects that include version upgrades (if significant) and new capabilities.
   - **Maintenance and Operations**—Projects that support applications in production. For example, projects that include break/fix, support staff, infrastructure costs, licensing costs, shared services costs, and minor updates.
   - **Sunset**—Projects that support applications that are being prepared for retirement. For example, projects that include planning and support for the application's retirement. It does not include replacement costs for a new application. Replacement costs belong to new investment projects associated to new applications.
   - **Administrative**—Projects that do not support an application. For example, projects that include agency technology refreshes, desktop refreshes, enterprise-wide planning initiatives, administrative office support or administrative initiatives.
8. In the **Project Purpose** field, enter a detailed description of the what the project is and how it will be accomplished.

9. Skip the **Cost Estimate** field. Do not enter this value;the system will auto-populate this field after the **Project Planned Value** page is completed and saved.

10. On the toolbar, click **Save** to save the project information.
Result: The system processes the request and displays a confirmation message. The system refreshes the **Project Lifecycle** page, the project name displays in the Bar Navigation Area, and the **Proposed** lifecycle stage is highlighted.



11. On the Area Navigation bar, click **Project Information**.
Result: The system displays the Project Information page. The **Name**, **Program ID**, **Program Name**, **Spend Type** and **Project Purpose** fields are pre-populated with values that were entered on the **Project Lifecycle Status** page when the project was created.



12. In the **Business Owner** field, enter the name of the person within your agency that should be the point of contact for the project.

13. In the Cost Start Date field, record the earliest date that you will begin planning or working on this project. You may enter the date directly into the field or use the calendar icon to select the date.

Note: You can leave this field blank initially, but you will not be able to create your Project Planned Value (budget) until it is completed with a valid date that is earlier than the **Cost End Date**.

14. In the Cost End Date field, record latest date that you will devote effort to this project. You may enter the date directly into the field or use the calendar icon to select the date.

    Note: You can leave this field blank initially, but you will not be able to create your Project Planned Value (budget) until it is completed with a valid date that is later than the **Cost Start Date**. You can also change this field later if you extend or shorten the life of the application.

15. Skip the **Cost Estimate** field. You do not need to enter this value because the system will auto populate this field after the **Planned Value** page is completed and saved.
16. The **FTE Support** field is no longer in use. It will be removed in a future release.
17. In the **Agency IT Project ID** field, enter your agency's IT project identification. *Note:* This field is provided as an option for your agency to enter their own project ID number.

The **Business Driver** field is no longer in use. It will be removed in a future release.

18. In the **Scope** field, explain the scope of the risk involved if the project is not implemented.
19. In the **Business Justification** field, enter the detailed Business Case that supports this project.
20. The **New Application Version** field is no longer in use. It will be removed in a future release.
21. The **New Software Version(s)** is no longer in use. It will be removed in a future release.
22. In the **How will the project implement the changes?** field, click the icon and select the value which best describes the implementation.
23. In the **Explanation of Agency Collaboration** field, enter a description of the collaboration between your Agency and any other Agency for this project. If your Agency is the only Agency working on this Project, leave this field blank.
24. In the **Agency Impact** field, click the icon and select the agencies that are part of the collaboration described in the **Explanation of Agency Collaboration** field above. If your Agency is the only Agency working on this Project, leave this field blank.

CAUTION: Do not press the Backspace key in this field. Doing so will cause the values in the drop down lists on the screen to no longer display. If this inadvertently occurs, press F5 to refresh the page. The values should reappear.

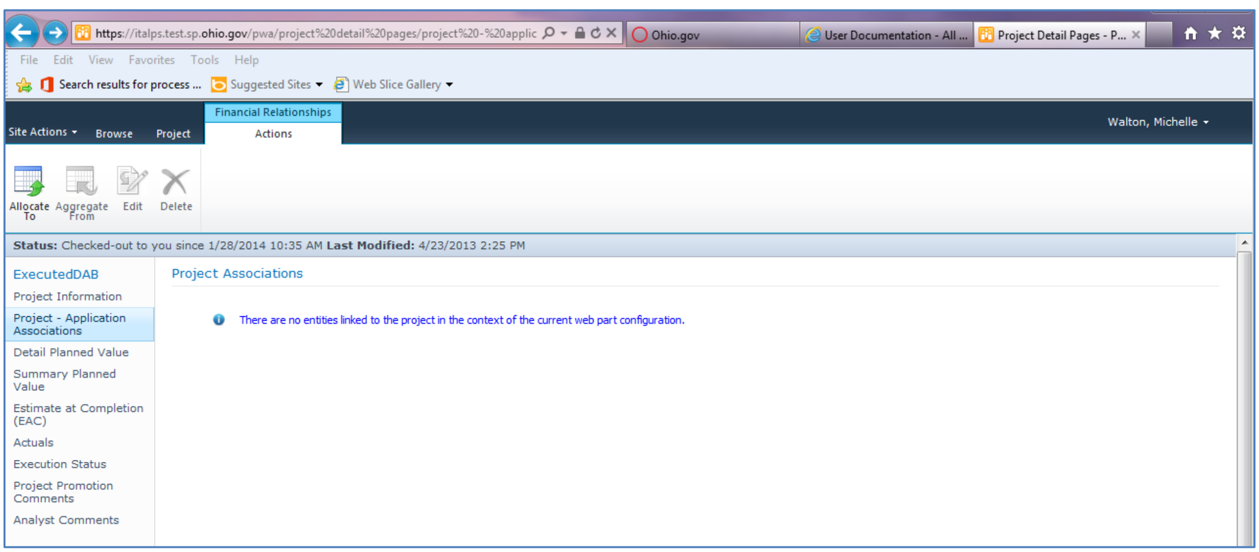
25. On the toolbar, click **Save** to save the data.
Result: The system processes the request and displays a confirmation message.

Associating a Project to an Application

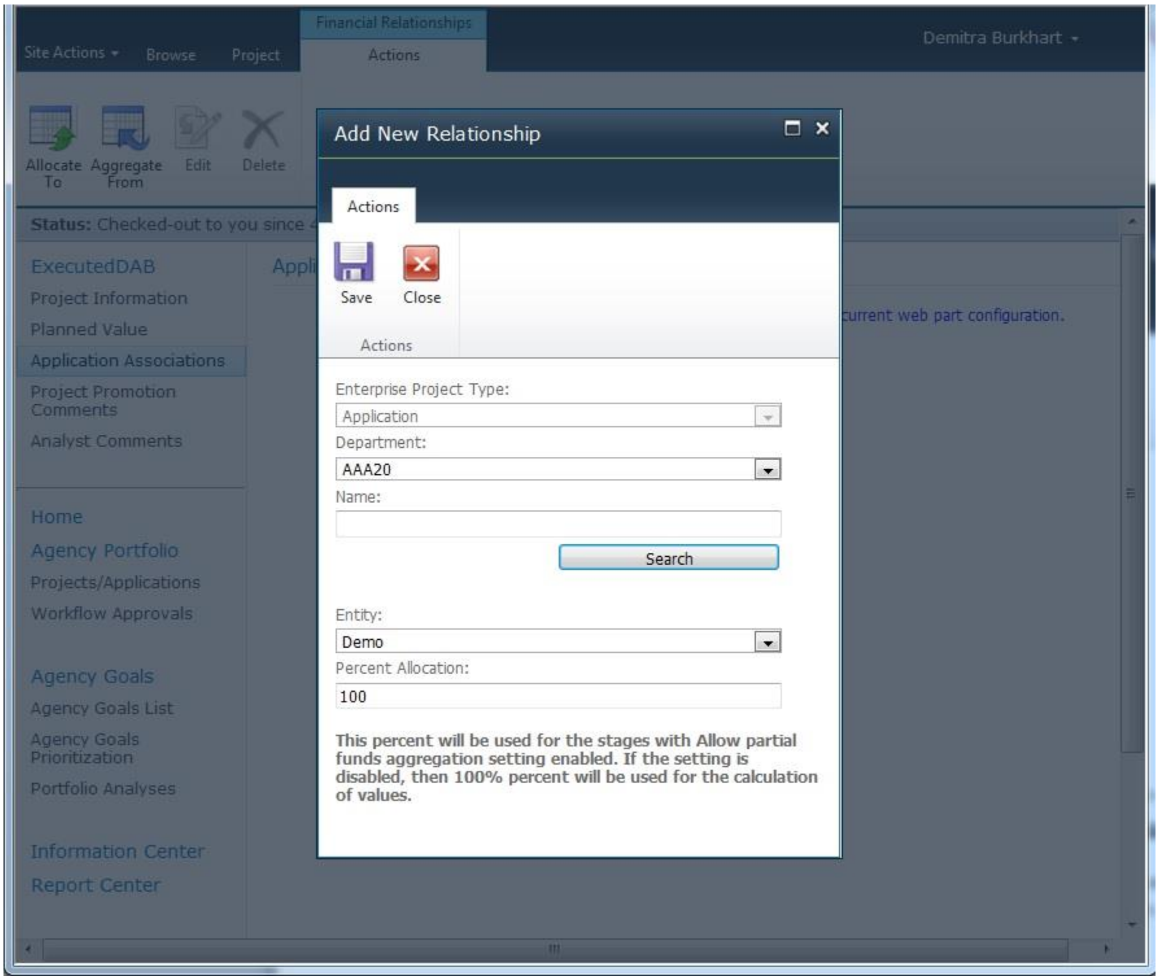
With the exception of Administrative type projects, projects are created to support agency applications. As such the relationship between a project and the application that it supports must be created in IT ALPS. This relationship enables an agency to have full costing information for an application by viewing all of the project costs that support it.

Note: This section outlines the steps to associate an application to your project. It assumes that you have your project open and checked out to you.

5. From the Area Navigation Bar, select Project-**Application Associations**.
Result: The system displays the **Project Associations** page. When you first display this page, the message below will display.



6. To initiate associating the project to the application, on the toolbar click **Allocate To** .
   Result: The system displays the **Add New Relationship** window.
   Note: The **Enterprise Project Type** field is auto-populated with **Application**. This is the default value and is read-only because we are at the project level, and are associating to an application.
   The **Department** field is auto-populated with your agency's acronym. No action is required.



7. Skip the **Name** field; no action is required.
8. Click the **Entity** field's drop-down list to display the list of your agency's applications, and select the application that you want to associate to this project.
9. In the **Percent Allocation** field, enter the percentage amount of this project that should be associated to the selected application.

10. In the **Add New Relationship** window, click **Save** to save the data.
    Result: The system closes the **Add New Relationship** window and the system processes the request and displays a confirmation message.

Adding Your Project's Planned Value

This section walks you through entering your project's planned value (budget). The IT ALPS Project Planned Value functionality enables you to build a bottoms-up budget where you can estimate planned spending by Resource Class, funding source and time period. The following Resource Classes are provided in IT ALPS:

- Labor
- Software
- Hardware
- Enterprise Services

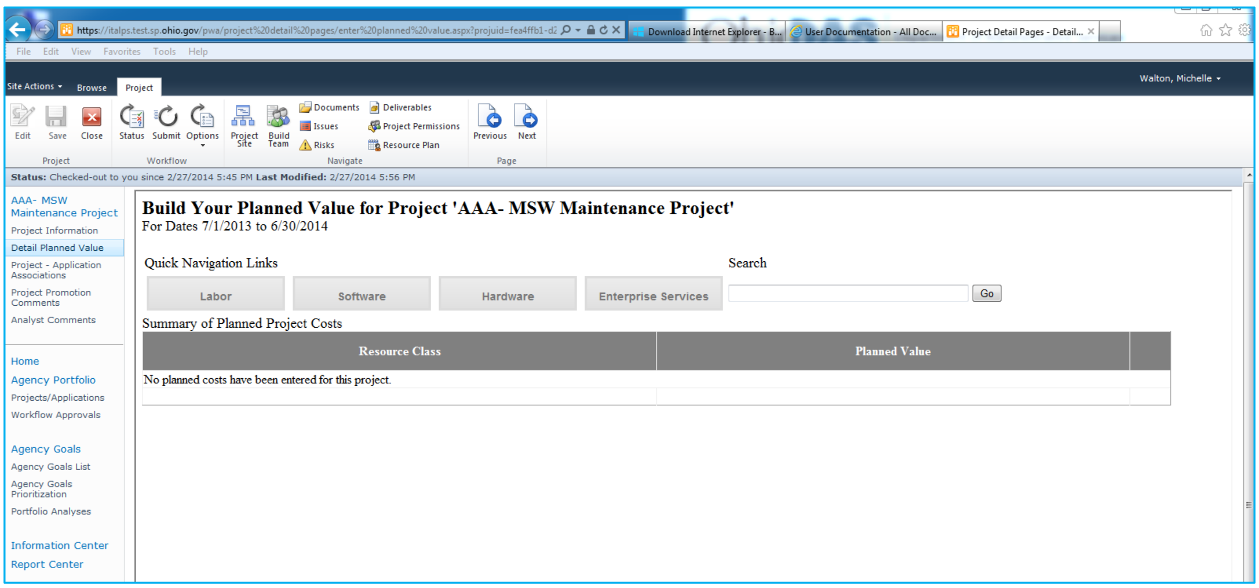
Each Resource Class is further defined by grouping Resource Items into Resource Types. For example, the Labor Class is further defined by two Types: Internal Labor and External Labor. Within each Resource Type are multiple Resource Items.

The Project Planned Value functionality allows you to build a detailed Project budget by planning the resources you will use in each Resource Class, planning the years in which these funds will be spent and then identifying the funding source for these planned expenses. You may use ALPS to manage Projects and Project Planned Value long before the you actually implement the projects. While Projects are in the Proposed stage, it is perfectly acceptable for your total project budget to exceed your Agency budget. This allows you to plan multiple projects and use that detailed data to help determine which Projects provide the most value within your Agency budget in any given fiscal year. Once you have selected those projects, they are the only ones you implement (promote to Enterprise Review.)

The Project Planned Value functionality provides dollar value estimates for Labor, Hardware and Software resources. These estimates are based on actual rate values that have been blended and averaged by OIT staff to give the Agency a reasonable average cost for the resource. For example, the External Labor resource costs are based on averages of CAI resource rates and the Internal Labor resource costs are based on averages of blended State employee rates. Because of the varied usage and customization of Enterprise Services, it is not possible to determine a relevant average cost.When you select an Enterprise Services resource in the Project Planned Value, the system will display $0.01 and allow you to enter an estimate relevant to your Agency and Project.

Build Your Planned Value for a Project

1. From the Area Navigation Bar, select Detail Planned Value.
   Result: The system displays the **Build Your Planned Value** page for the project you are viewing. The page is titled **Build Your Planned Value for Project <your project name>**. Below the title, the system displays **For Dates <your project's Cost Start Date> to <your project's Cost End Date>**. If you have not yet defined the Project Cost Start and End dates for your project, the page will open with a message instructing you to enter Project Cost Start and End Dates prior to entering Project Planned Value.



2. The system displays one button for each of the four Resource Classes:
   - Labor
   - Software
   - Hardware
   - Enterprise Services

   You will select these buttons one at a time in order to build your Project Planned Value for each Resource Class.

3. After you have added resources to your Project Planned Value, the **Resource Class** and **Planned Value** columns in the middle of the page will display the total, by Class, of Planned Value added for this project.

<insert screen print>

Note: Wondering about the Search feature located on this page? See the ***Alternate ways to add an item to the Detailed Planned Value for a Project*** section following the ***Build Detailed Planned Value for a Project by Resource Class*** section.

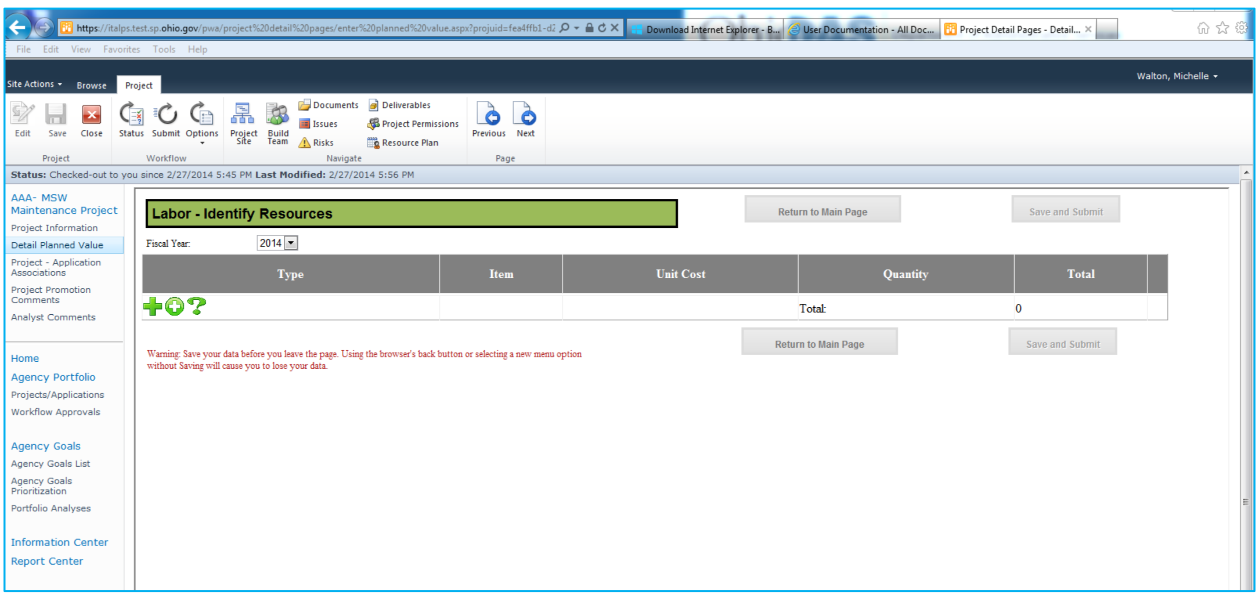
Build Detailed Planned Value for a Project by Resource Class

Add Labor

You will build the detailed Planned Value for your project by Resource Class. The Detail Planned Value page has slight variations by Class. This section will guide you through each one.

1. From the **Build Your Planned Value** page, click the **Labor** button.

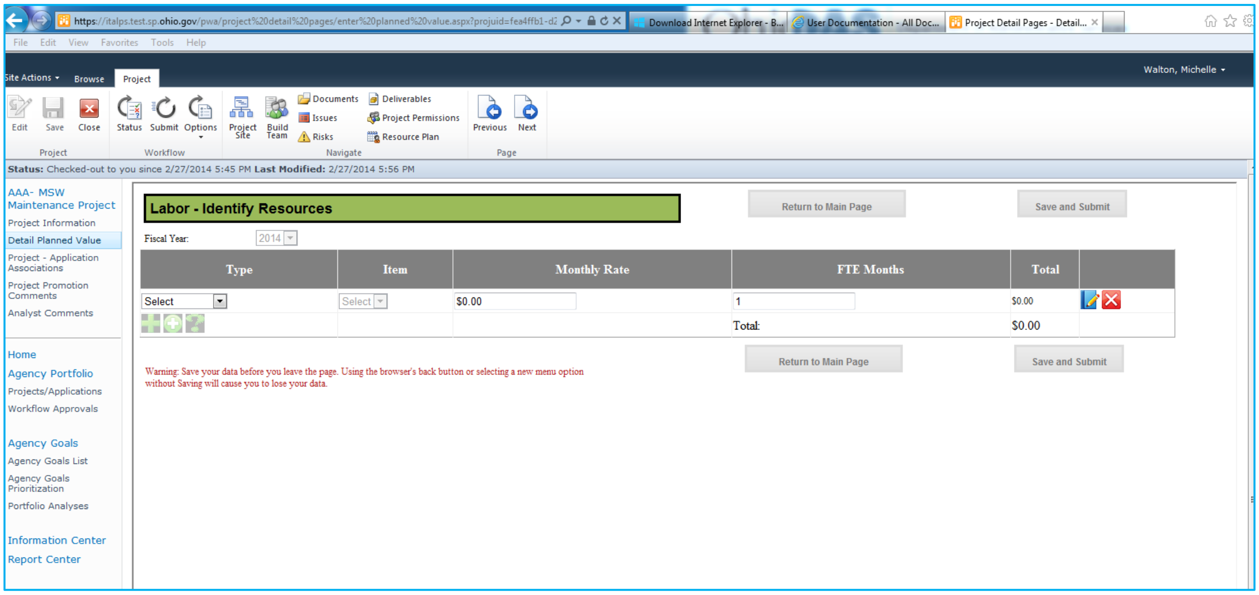
   Result: The **Labor – Identify Resources** page is displayed.



2. In the **Fiscal Year** field, click the drop-down arrow and select the Fiscal Year for which you want to add Labor Resources.

3. Click the  icon.

   Result: The system opens a new line of fields that will allow you to add a Labor Resource.

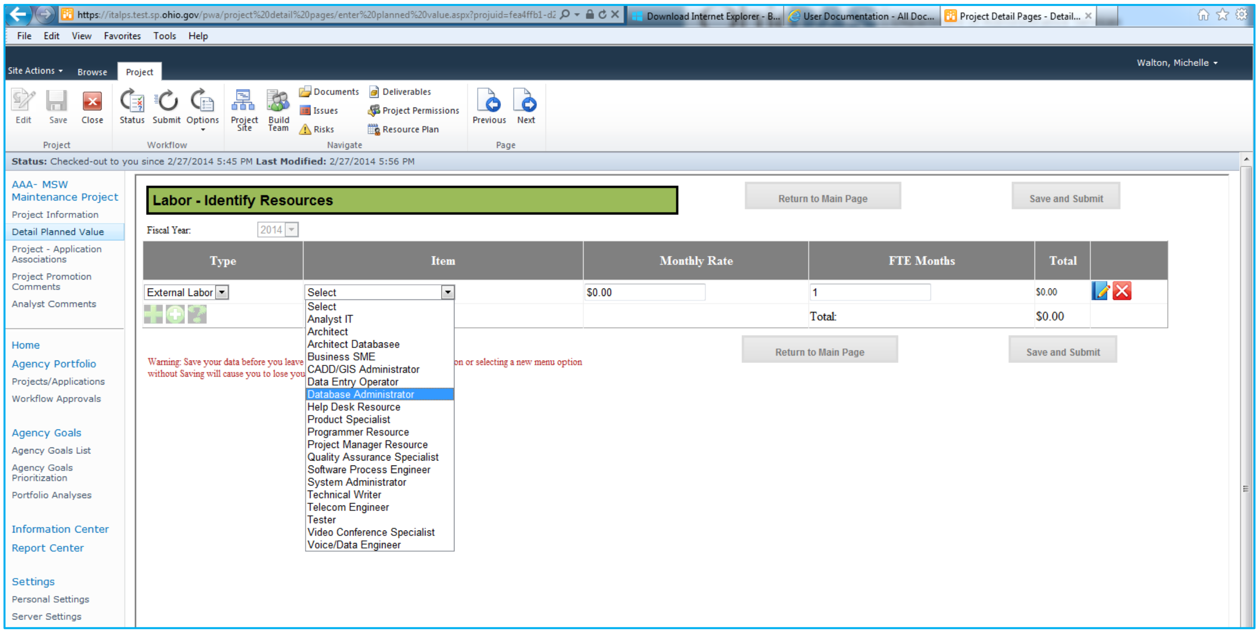


4. In the **Type** field, click the drop-down arrow.

   Result: The system displays a list of the available Resource Types in the Resource Class for which you are building your project's planned value. This drilling-down by Type will focus the list of items, making it easier for you to select an item.

5. In the **Item** field, click the drop-down arrow.

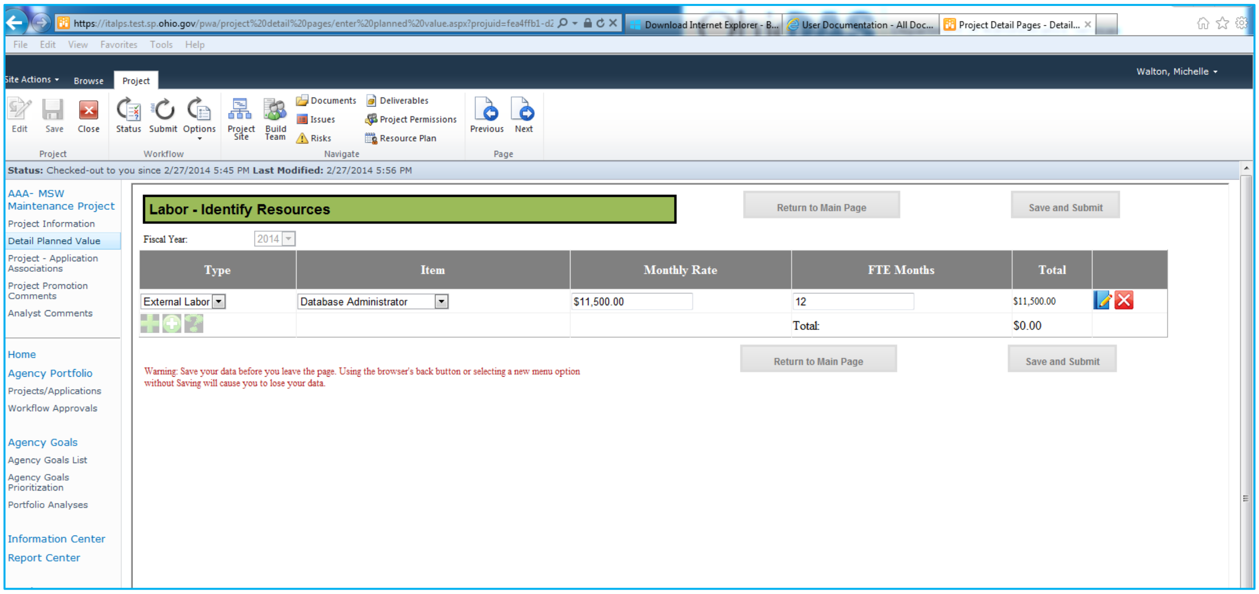
   Result: The system displays a list of standard resources of the type you selected in the **Type** field.



6. Select the Resource Item you want to add to your project's planned value.

   Result: The system populates the **Monthly Rate** with the standard monthly rate for this type of resource, as recorded in the Resource Look-up Table. If the system populates $0.01, it means there is not an established standard rate available.

   NOTE: The standard monthly rate is just a starting point to help you establish your budget. You do not have to use this rate if you have already determined an accurate rate for this resource on this project.



7. In the **Monthly Rate** field, you may either leave the system-populated amount in place, or replace it with an amount that your agency has determined appropriate for this resource.
8. In the **FTE Months** field enter the number of labor months you plan to use for this resource during the fiscal year you are building. This number represents the total number of labor months; it is not restricted by the number of people or the duration. For example, an entry of 12 FTE Months can represent any of the following:
    a. One full-time person for 1 year
    b. 2 full-time people for 6 months each (concurrent or consecutive)
    c. ½-time person for 12 months
    d. 12 full-time people for one month each (concurrent or consecutive)

    You may enter more than 12 months in this field. For example, you might enter 36 months to represent 3 full-time people.

9. After reviewing the line of the item you added, click the **Add/Edit**  button to save the line to the page. **Note:** When you are adding a new line, the hover text for this button will say 'Add'; for previously added lines, the hover text says 'Edit'.

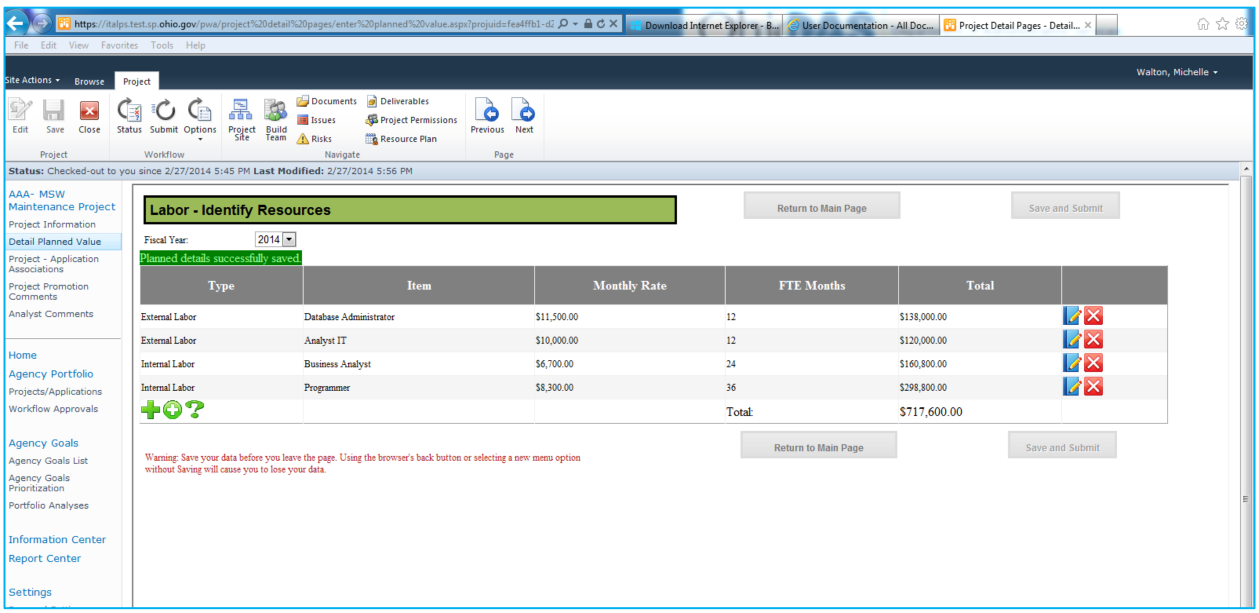
    Result: The system saves the line to the page and enables the buttons that will allow you to add an additional item:  . If these icons are not enabled, click the **Add/Edit** button a second time.

    Note: Wondering what the other two icons are? See the ***Alternate ways to add an item to the Detailed Planned Value for a Project*** section below.

CAUTION: Adding an item to a page does not save it to your Project Planned Value! Do not exit from this page in any manner without clicking the **Save and Submit** button. Even though you have saved each line to the page, the data will be erased if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of lost data.

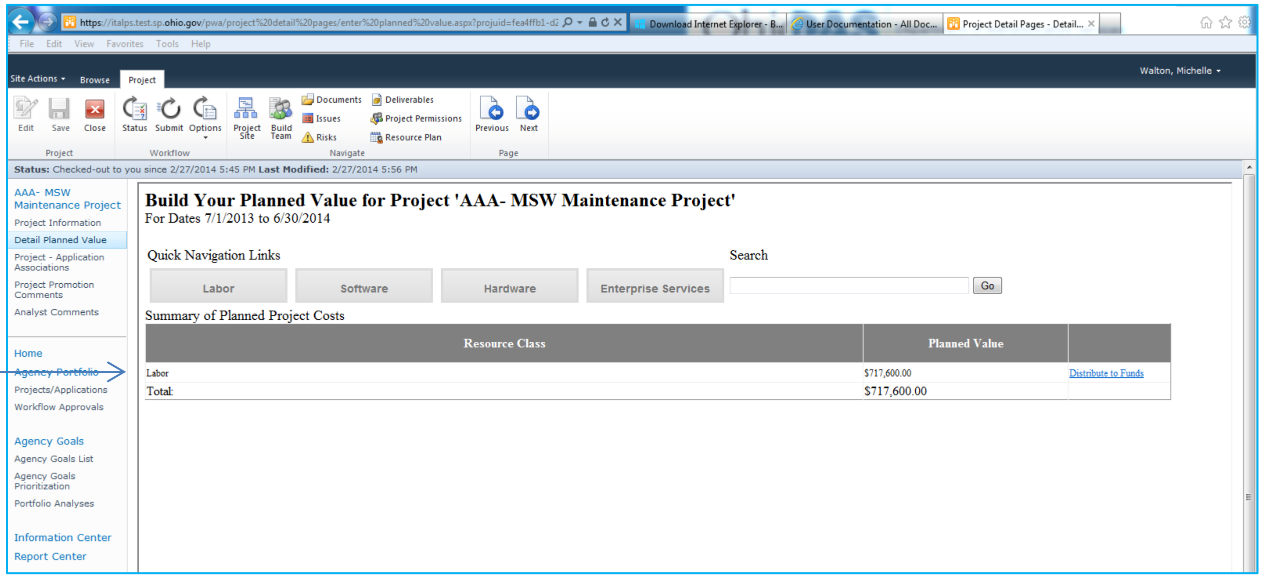
10. After you have finished adding items in this Resource Class, click the **Save and Submit** button.

    Result: The system saves all of the items on the page and displays a confirmation message.



11. Click the **Return to Main Page** button.

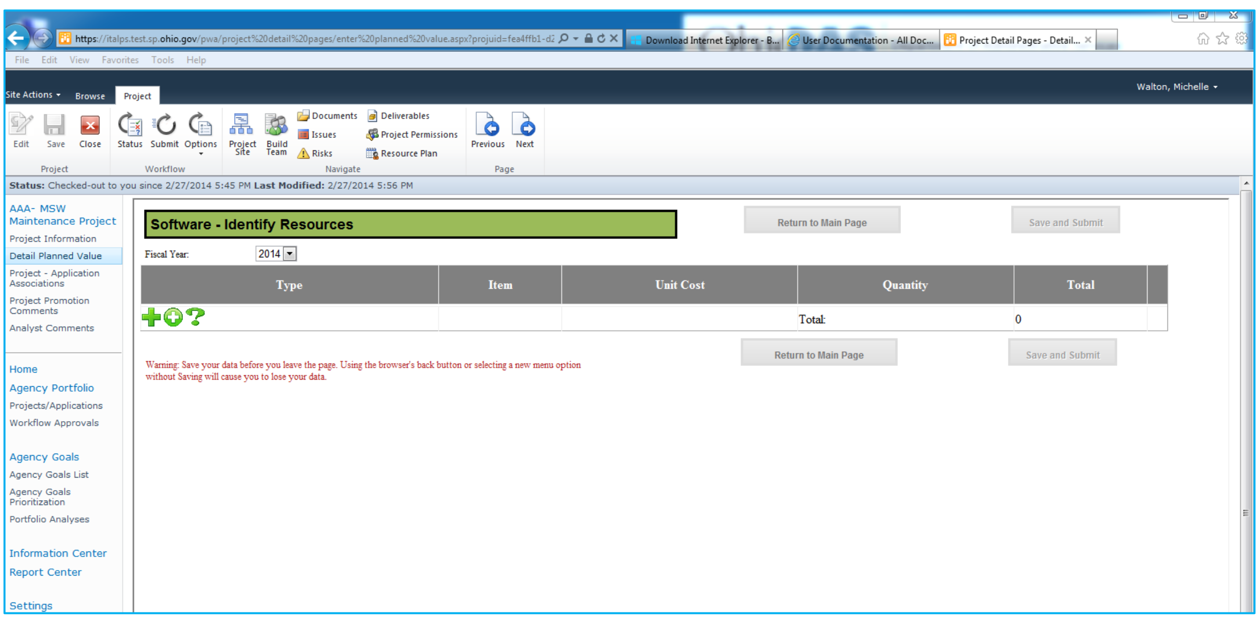
    Result: The system displays the **Build Your Planned Value** page for your project. This time, you will see a new entry in the Summary of Planned Project Costs section. The new entry will display the word Labor, along with the total of the Labor items you just entered. The Total will be updated to display the total amount of your Project Planned Value thus far.



Add Software

12. From the **Build Your Planned Value** page, click the **Software** button.

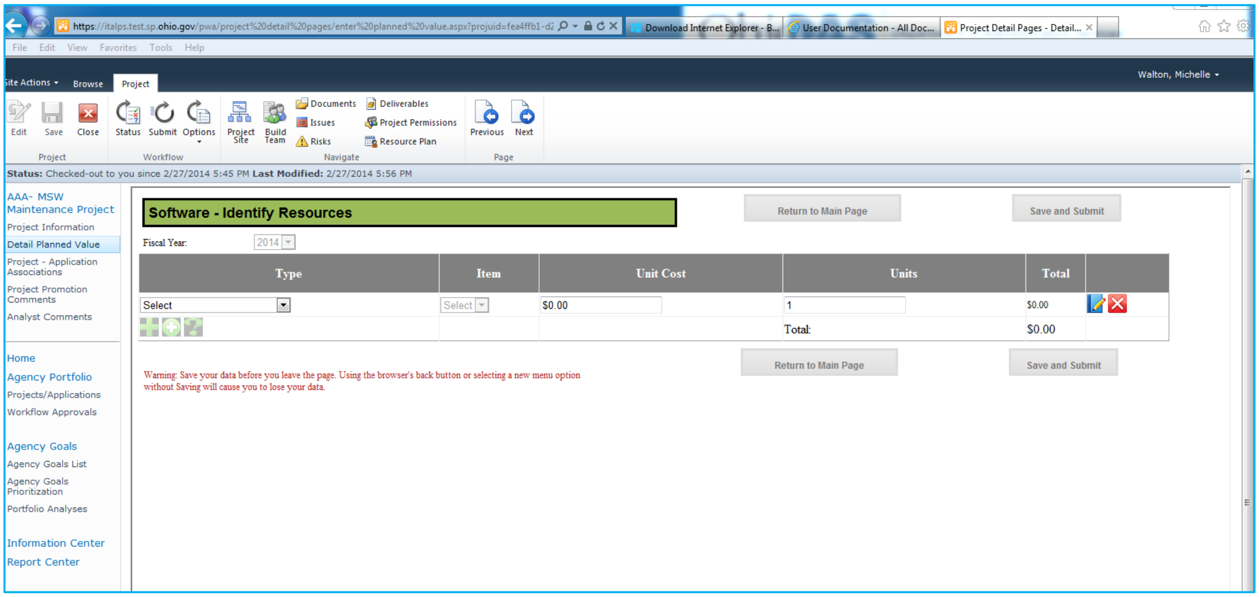
Result: The **Software – Identify Resources** page is displayed.



13. In the **Fiscal Year** field, click the drop-down arrow and select the Fiscal Year for which you want to add Software Resources.

14. Click the  icon.

Result: The system opens a new line of fields that will allow you to add a Software Resource.



15. In the **Type** field, click the drop-down arrow.

    Result: The system displays a list of the available Resource Types in the Resource Class for which you are building your project's planned value. This drilling-down by Type will focus the list of items, making it easier for you to select an item.

16. In the **Item** field, click the drop-down arrow.

    Result: The system displays a list of standard resources of the type you selected in the **Type** field.

17. Select the Resource Item you want to add to your project's planned value.

    Result: The system populates the **Unit Cost** with a standard cost for one unit of this type of resource, as recorded in the Resource Look-up Table. If the system populates $0.01, it means there is not an established standard cost available.

    NOTE: The standard unit cost is just a starting point to help you establish your budget. You do not have to use this cost if you have already determined an accurate cost for this resource on this project.

18. In the **Unit Cost** field, you may either leave the system-populated amount in place, or replace it with an amount that your agency has determined appropriate for this resource.
19. In the **Units** field enter the number of units you plan to use for this resource during the fiscal year you are building.

20. After reviewing the line of the item you added, click the **Add/Edit** button to save the line to the page. **Note:** When you are adding a new line, the hover text for this button will say ‘Add’; for previously added lines, the hover text says ‘Edit’.

    Result: The system saves the line to the page and enables the buttons that will allow you to add an additional item: . If these icons are not enabled, click the **Add/Edit** button a second time.

    Note: Wondering what the other two icons are? See the ***Alternate ways to add an item to the Detailed Planned Value for a Project*** section below.

    CAUTION: Adding an item to a page does not save it to your Project Planned Value! Do not exit from this page in any manner without clicking the

    Save and Submit button. Even though you have saved each line to the page, the data will be erased if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of lost data.

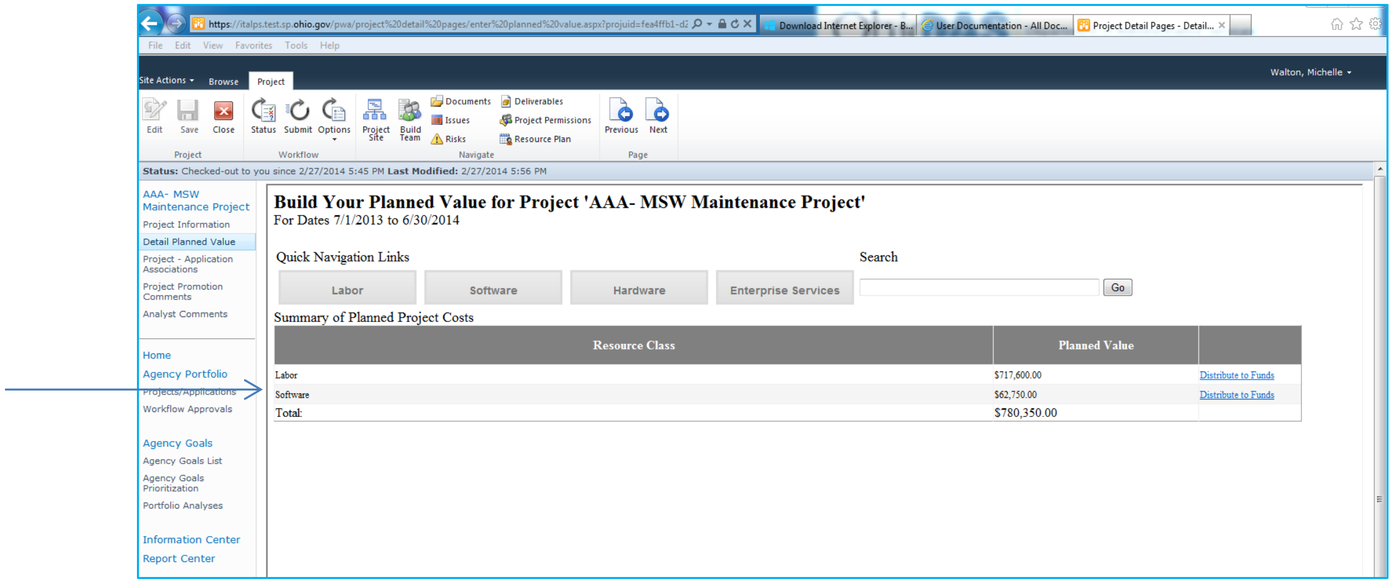
21. After you have finished adding items in this Resource Class, click the

    Save and Submit button.

    Result: The system saves all of the items on the page and displays a confirmation message.

22. Click the Return to Main Page button.

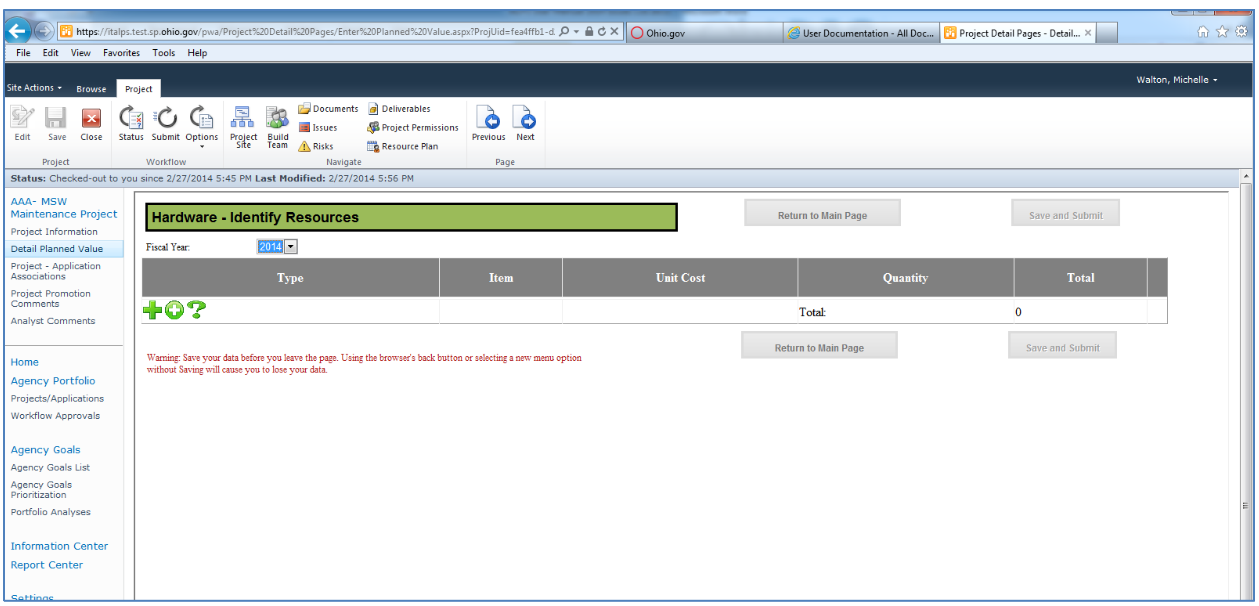
    Result: The system displays the **Build Your Planned Value** page for your project. This time, you will see a new entry in the Summary of Planned Project Costs section. The new entry will display the word Software, along with the total of the Software items you just entered. The Total will be updated to display the total amount of your Project Planned Value thus far.



Add Hardware

23. From the **Build Your Planned Value** page, click the **Hardware** button.

    Result: The **Hardware – Identify Resources** page is displayed.



24. In the **Fiscal Year** field, click the drop-down arrow and select the Fiscal Year for which you want to add Hardware Resources.

25. Click the  icon.

Result: The system opens a new line of fields that will allow you to add a Hardware Resource.

26. In the **Type** field, click the drop-down arrow.

    Result: The system displays a list of the available Resource Types in the Resource Class for which you are building your project's planned value. This drilling-down by Type will focus the list of items, making it easier for you to select an item.

27. In the **Item** field, click the drop-down arrow.

    Result: The system displays a list of standard resources of the type you selected in the **Type** field.

28. Select the Resource Item you want to add to your project's planned value.

    Result: The system populates the **Unit Cost** with a standard cost for one unit of this type of resource, as recorded in the Resource Look-up Table. If the system populates $0.01, it means there is not an established standard cost available.

    NOTE: The standard unit cost is just a starting point to help you establish your budget. You do not have to use this cost if you have already determined an accurate cost for this resource on this project.

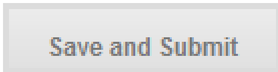
29. In the **Unit Cost** field, you may either leave the system-populated amount in place, or replace it with an amount that your agency has determined appropriate for this resource.
30. In the **Units** field enter the number of units you plan to use for this resource during the fiscal year you are building.

31. After reviewing the line of the item you added, click the **Add/Edit** button to save the line to the page. **Note:** When you are adding a new line, the hover text for this button will say 'Add'; for previously added lines, the hover text says 'Edit'.

    Result: The system saves the line to the page and enables the buttons that will allow you to add an additional item: . If these icons are not enabled, click the **Add/Edit** button a second time.

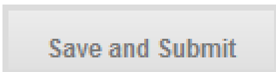
    Note: Wondering what the other two icons are? See the ***Alternate ways to add an item to the Detailed Planned Value for a Project*** section below.

    CAUTION: Adding an item to a page does not save it to your Resource Plan! Do not exit from this page in any manner without clicking the



button. Even though you have saved each line to the page, the data will be erased if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of lost data.

32. After you have finished adding items in this Resource Class, click the



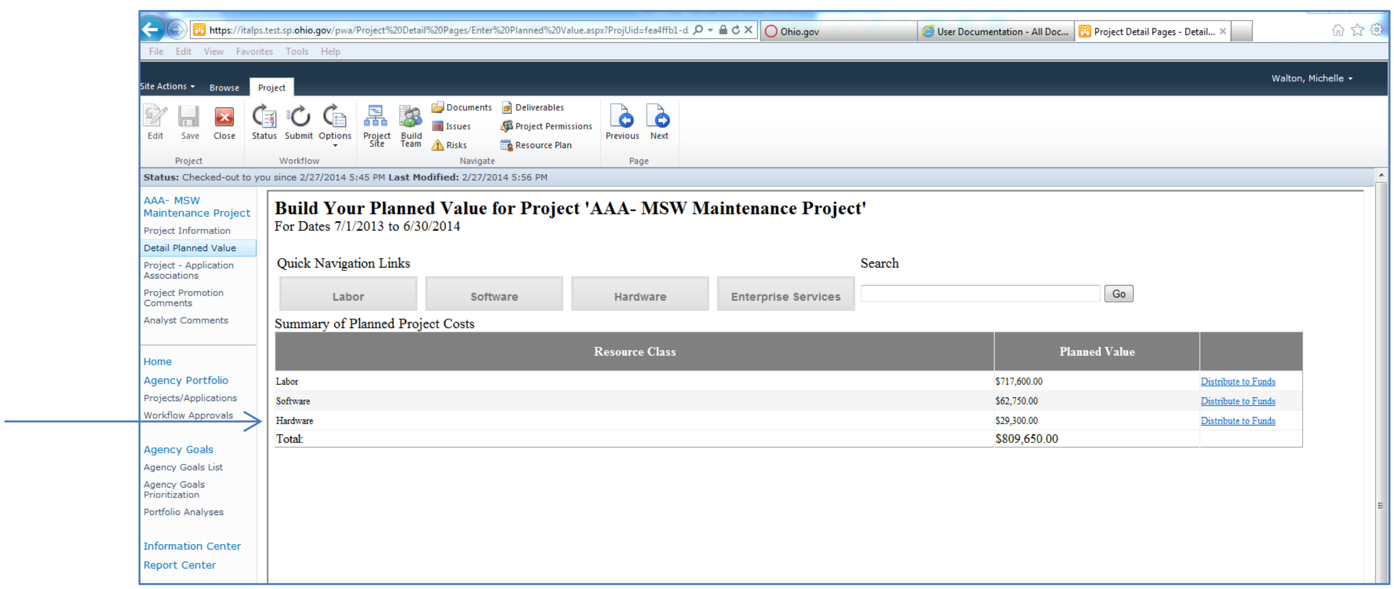
button.

Result: The system saves all of the items on the page and displays a confirmation message.

33. Click the

button.

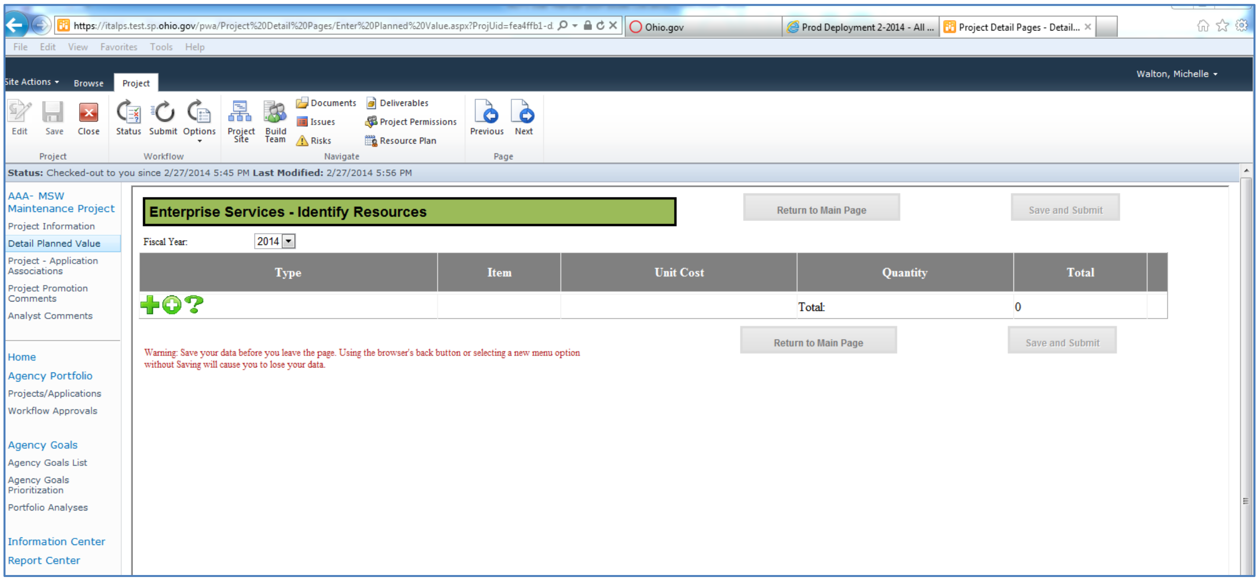
Result: The system displays the **Build Your Planned Value** page for your project. This time, you will see a new entry in the Summary of Planned Project Costs section. The new entry will display the word Hardware, along with the total of the Hardware items you just entered. The Total will be updated to display the total amount of your Project Planned Value thus far.



Add Enterprise Services

34. From the **Build Your Planned Value** page, click the **Enterprise Services** button.

Result: The **Enterprise Services – Identify Resources** page is displayed.



35. In the **Fiscal Year** field, click the drop-down arrow and select the Fiscal Year for which you want to add Enterprise Services Resources.

36. Click the  icon.

    Result: The system opens a new line of fields that will allow you to add an Enterprise Services Resource.

37. In the **Type** field, click the drop-down arrow.

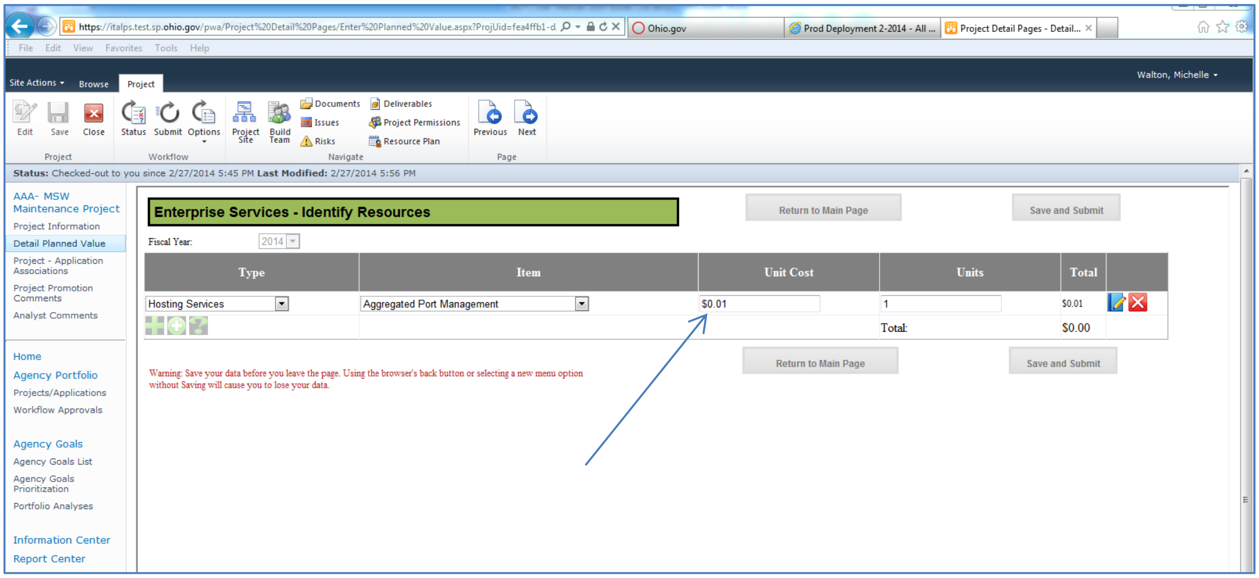
    Result: The system displays a list of the available Resource Types in the Resource Class for which you are building your project's planned value. This drilling-down by Type will focus the list of items, making it easier for you to select an item.

38. In the **Item** field, click the drop-down arrow.

    Result: The system displays a list of standard resources of the type you selected in the **Type** field.

39. Select the Resource Item you want to add to your project's planned value.

    Result: The system populates the **Unit Cost** with $0.01. With other resources, this field may be populated with a standard cost as recorded in the Resource Look-up Table. Enterprise Services are those services you purchase from OIT; the price of the service will vary based on many factors specific to your project. When you are first planning your project and building your budget, you can record the Enterprise Services you plan to use, leaving the **Unit Cost** at $0.01. Later, you can update this item when you have determined an estimate relevant to your Agency and Project.



40. In the **Unit Cost** field, you may temporarily leave the system-populated $0.01 in place, or replace it with the budgeted amount for this service.
41. In the **Units** field leave the system-populated value of 1 unit. Enterprise Services are services, so they are not counted as individual units. The cost you will eventually enter will be the total budgeted amount for this service.
42. After reviewing the line of the item you added, click the **Add/Edit** button to save the line to the page. **Note:** When you are adding a new line, the hover text for this button will say 'Add'; for previously added lines, the hover text says 'Edit'.

Result: The system saves the line to the page and enables the buttons that will allow you to add an additional item: . If these icons are not enabled, click the **Add/Edit** button a second time.

Note: Wondering what the other two icons are? See the ***Alternate ways to add an item to the Detailed Planned Value for a Project*** section below.

CAUTION: Adding an item to a page does not save it to your Project Planned Value!

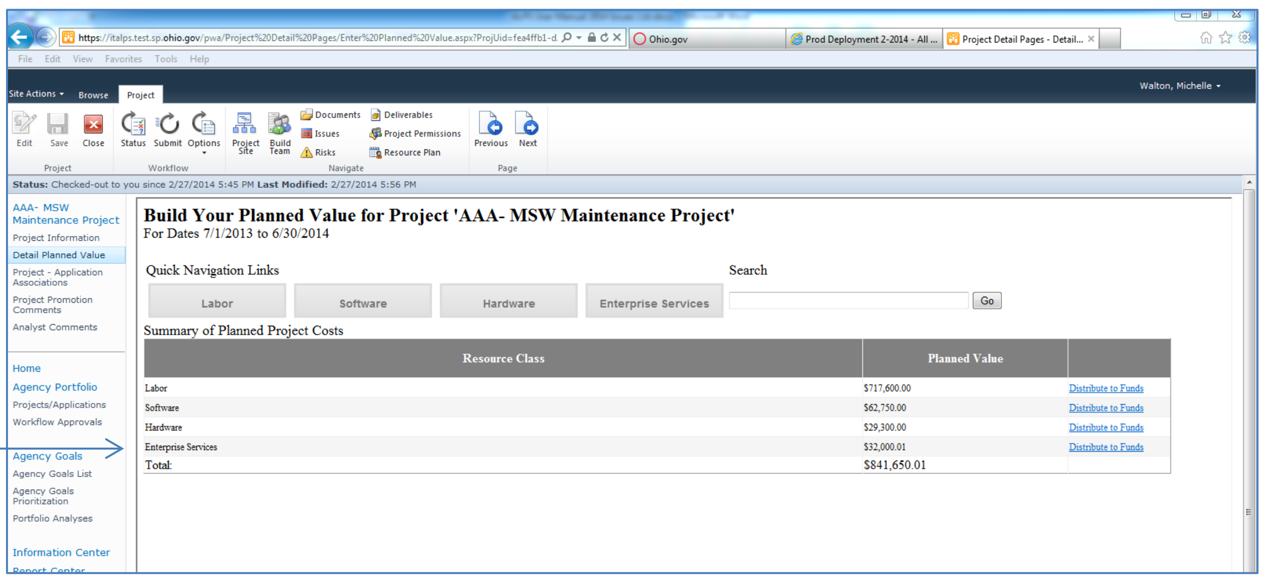
Do not exit from this page in any manner without clicking the Save and Submit button. Even though you have saved each line to the page, the data will be erased if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of lost data.

43. After you have finished adding items in this Resource Class, click the **Save and Submit** button.

    Result: The system saves all of the items on the page and displays a confirmation message.

44. Click the **Return to Main Page** button.

    Result: The system displays the **Build Your Planned Value** page for your project. This time, you will see a new entry in the Summary of Planned Project Costs section. The new entry will display the word Hardware, along with the total of the Enterprise Services you just entered. The Total will be updated to display the total amount of your Project Planned Value thus far.



Alternate ways to add an item to the Detailed Planned Value for a Project

In addition to using the Resource Type and Resource Item drop-downs to select items for your Project Planned Value, there are two additional means: the **Search** feature and the **Add a Custom Item** feature.

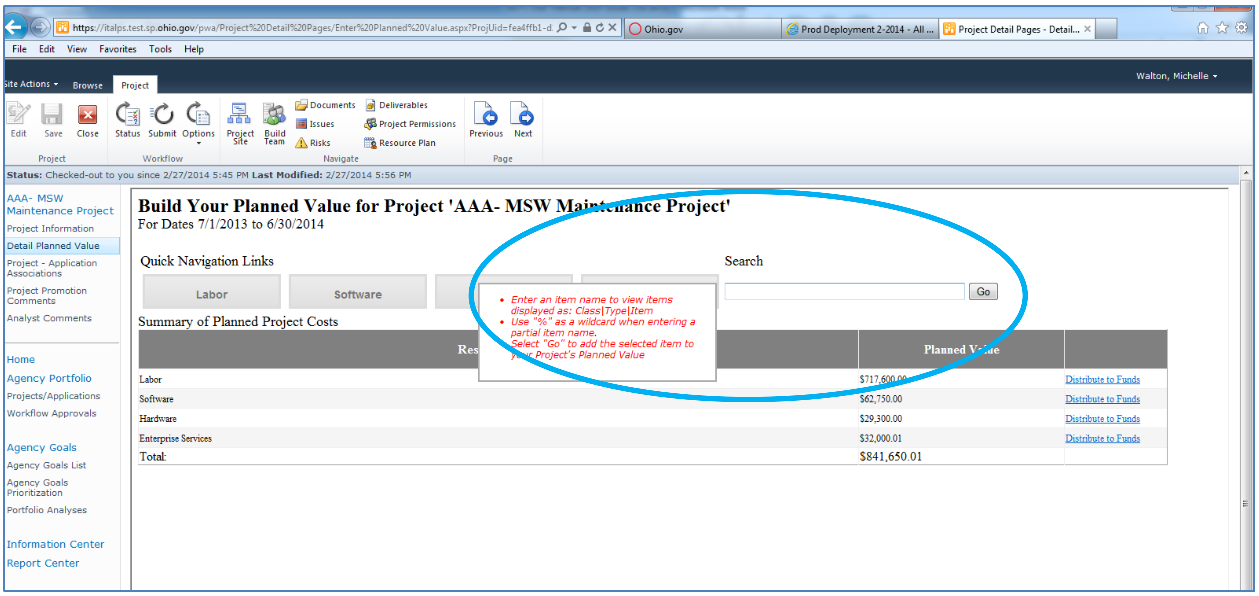
The **Search** allows you to search for an Item by Item name, without knowing the Resource Class or Resource Type. In the event that an item exists in more than one Resource Class and Type, this feature will also allow you to view all of the available options and select the one appropriate for your Project.

The **Search** feature is available from both the **Build Your Planned Value** and the **Identify Resources** (Detailed Planned Value) pages.

Search for an item from the Build Your Planned Value page

1. On the **Build Your Planned Value** page, hover your mouse over search box.

   Result: Instructions for using the search are displayed.



2. In the Search box, enter the name of an item.

   Result: As you type, items that match your entry will be displayed in this format: Resource Class|Resource Type|Resource Item. When you search from this page, the system searches through all Resource Classes and Types. For example, as you type **desk** the system will offer possiblities including

   Software|End User|Desktop publishing software

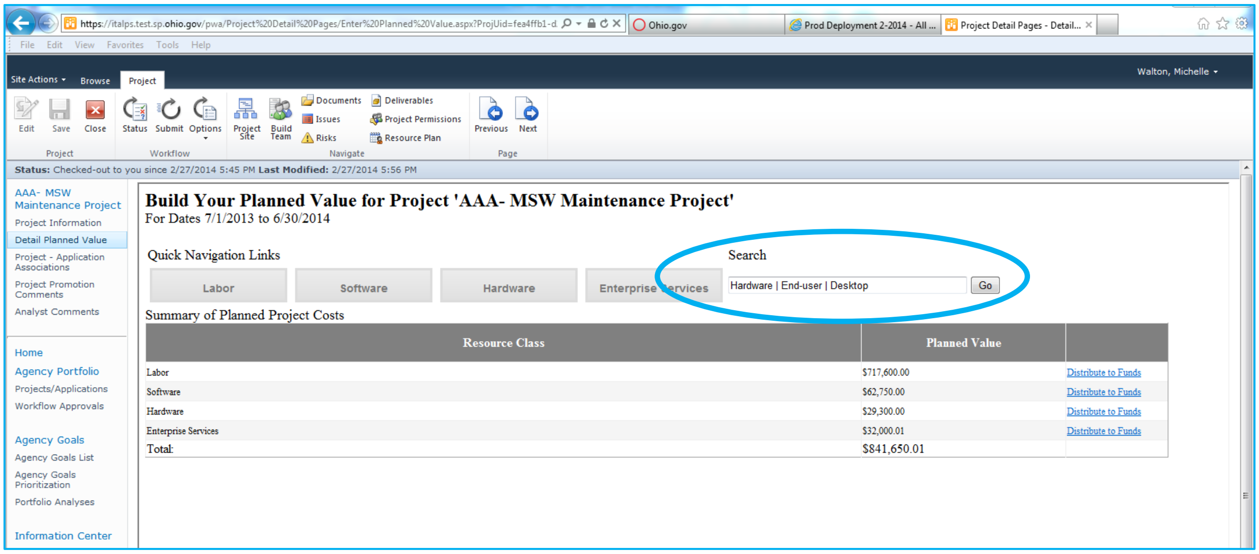
   Hardware|End User|Desktop

   Note: You may also use the percent sign % as a wildcard at the beginning or end of a word. For instance, in the example above if you entered **%desk** the system would display the items above as well as Labor|External Labor|Help Desk Resource.

   Remember: You are searching for a Resource ITEM, so an item will be displayed only when the ITEM matches your search criteria. Nothing will display if your search criteria doesn't match a Resource Item, even it does match a Resource Class or Resource Type.

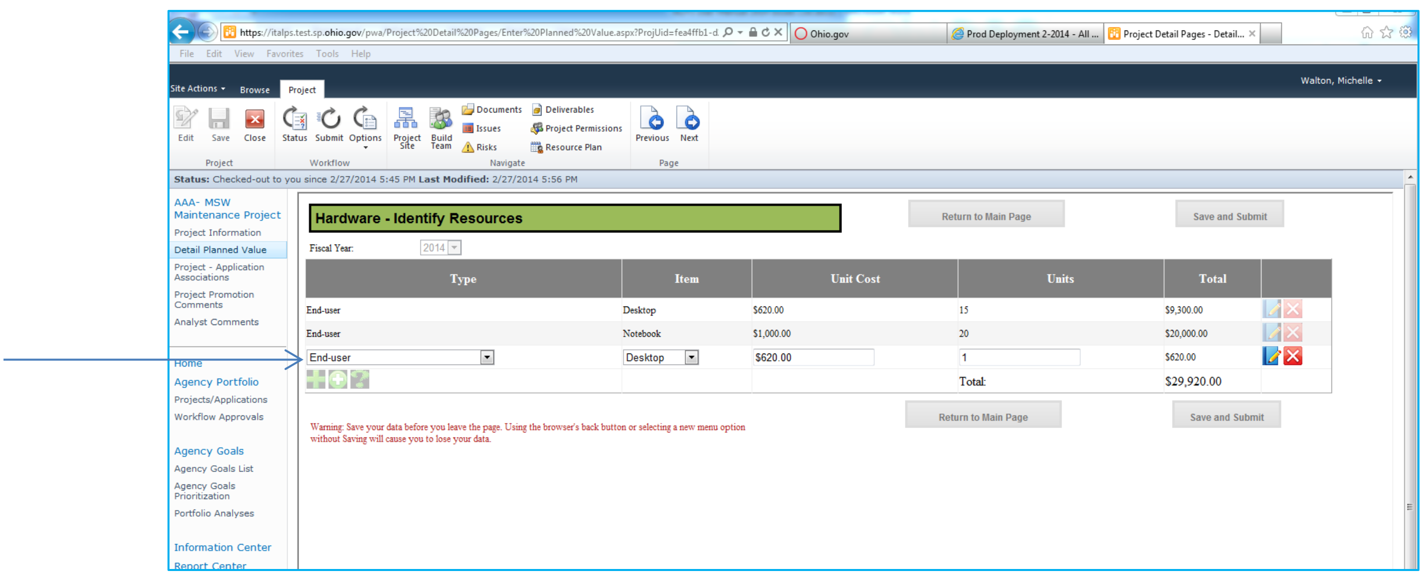
3. When you see the item you want, click on it.

Result: The item you selected is displayed in the **Search** box.



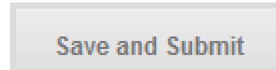
4. Click the Go button.

Result: The appropriate Identify Resources page for your item opens and inserts the item into a row on that page. For example: If you select Hardware|End User|Desktop, the **Hardware - Identify** Resources page is opened.



5. Proceed on this page as described in the ***Build Detailed Planned Value for a Project by Resource Class*** section above.

CAUTION: Adding an item to a page does not save it to your Project Planned Value!

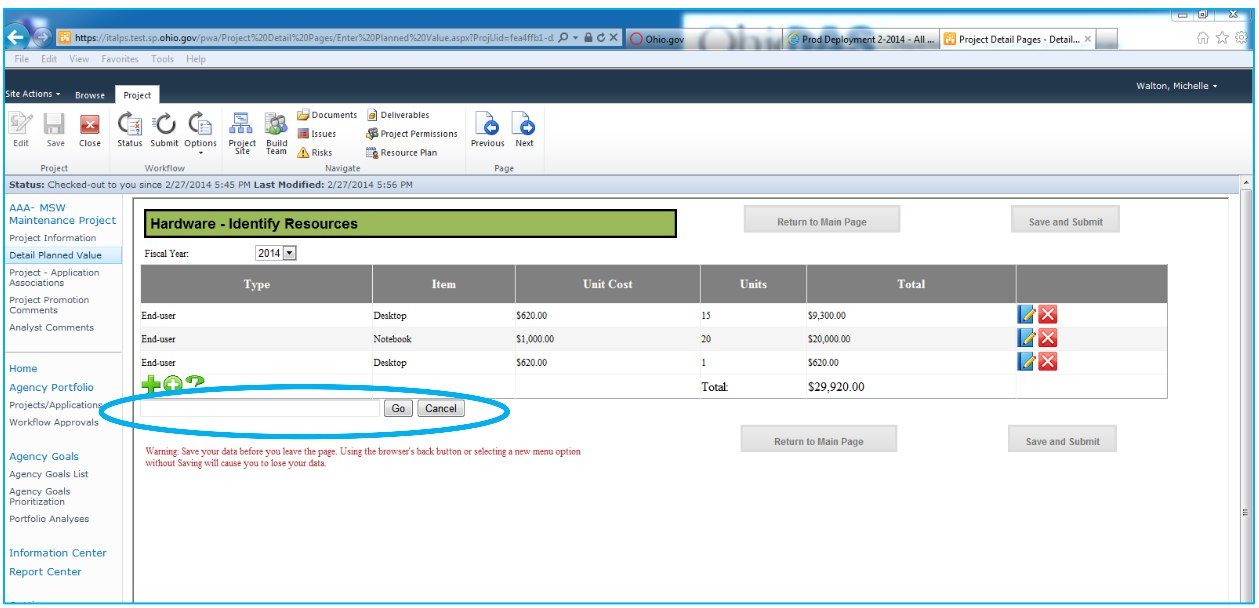
Do not exit from this page in any manner without clicking the 

button. Even though you have saved each line to the page, the data will be erased if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of lost data.

Search for an item from the Identify Resources page

1. On the **Identify Resources** page (any Resource Class), click the  to open the Search box.

   Result: The Search functionality fields are displayed.



2. In the Search box, enter the name of an item.

   Result: As you type, items that match your entry will be displayed in this format: Resource Class|Resource Type|Resource Item. When you search from this page, the system searches all Resource Types within the Resource Class of the page you are on. For example, if you are searching from the **Enterprise Services - Identify Resources** page, as you type **data** the system will offer only those items in the Enterprise Services Class. So it will find:

   Enterprise Services|Hosting Services|Database Support

   Enterprise Services|Storage & Backup Services|Data Storage

   but it will not find:

Labor|Internal Labor|Database Analyst Specialist

Note: You may also use the percent sign % as a wildcard at the beginning or end of a word. For example, if you are searching from the **Hardware - Identify Resources** page, and you type **%serv** the system will display:

Hardware|Cloud|Hybrid Cloud Services

Hardware|Cloud|PaaS(Platform-as-a-service)

Hardware|Cloud|IaaS (Infrastructure-as-a-service)

Hardware|Maintenance|Server Maintenance

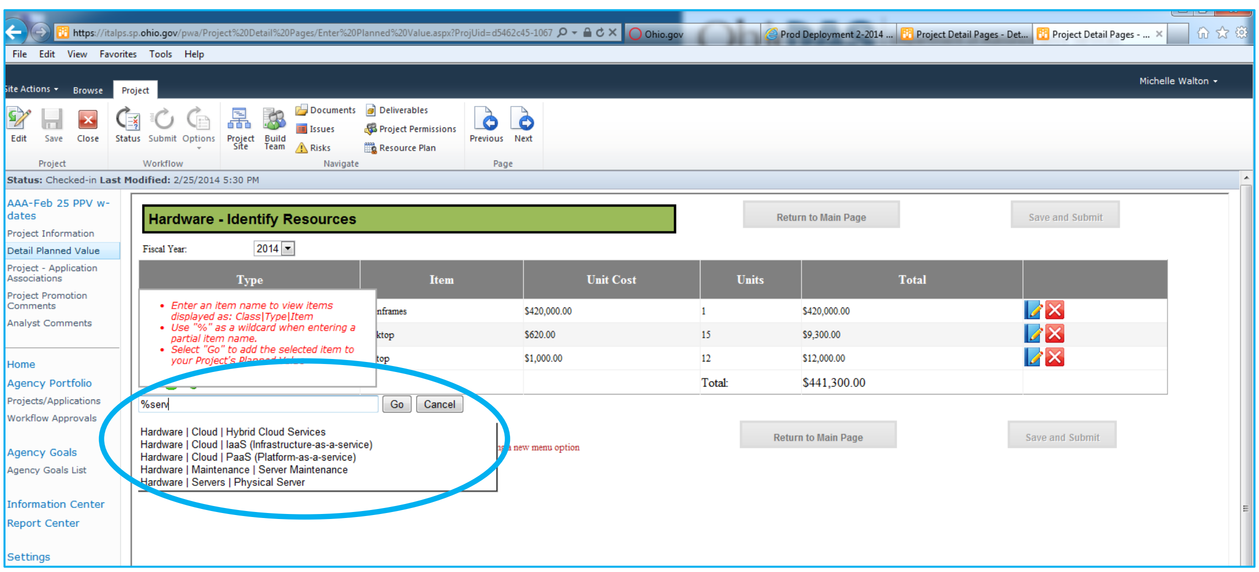
Hardware|Servers|Physical Servers

As you continue to type **%server**, the search will narrow to:

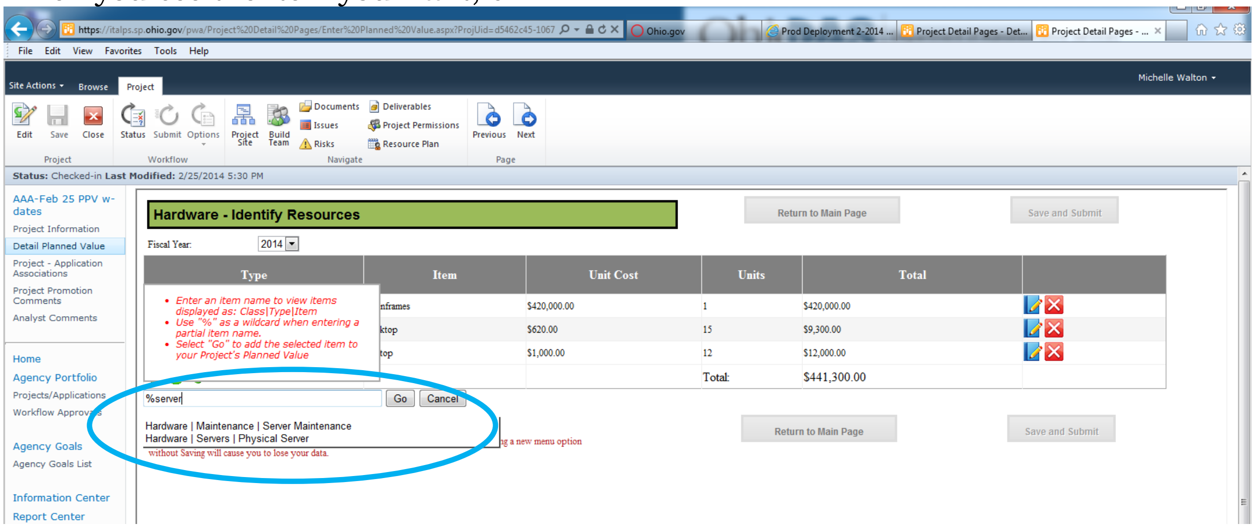
Hardware|Maintenance|Server Maintenance

Hardware|Servers|Physical Servers

Remember: You are searching for a Resource ITEM, so an item will be displayed only when the ITEM matches your search criteria. Nothing will display if your search criteria doesn't match a Resource **Item**, even it does match a Resource Class or Resource Type.

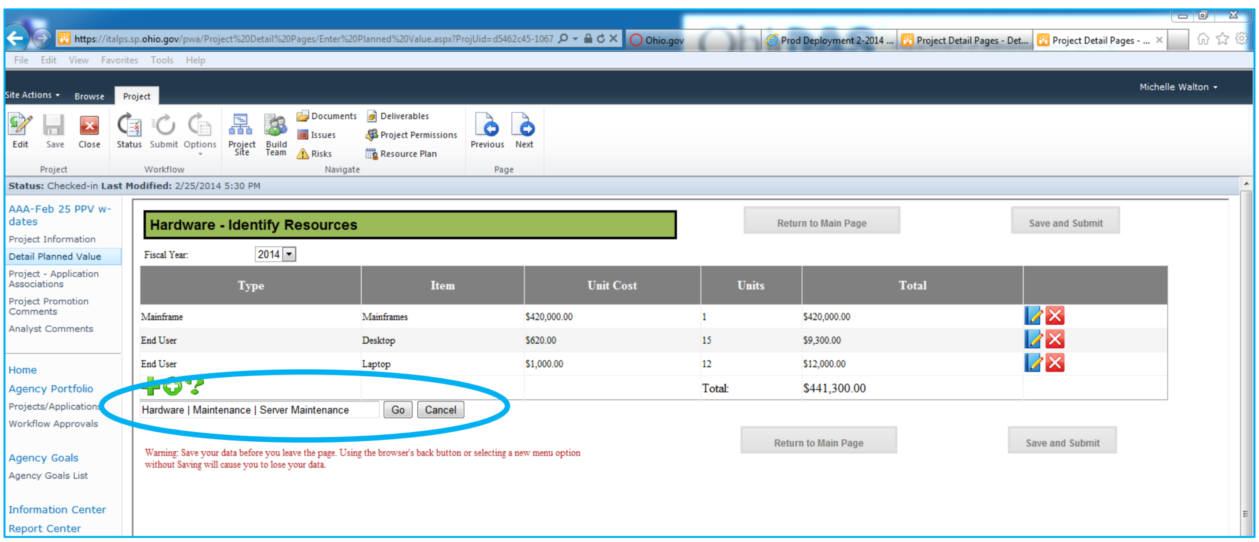


3. When you see the item you want, c



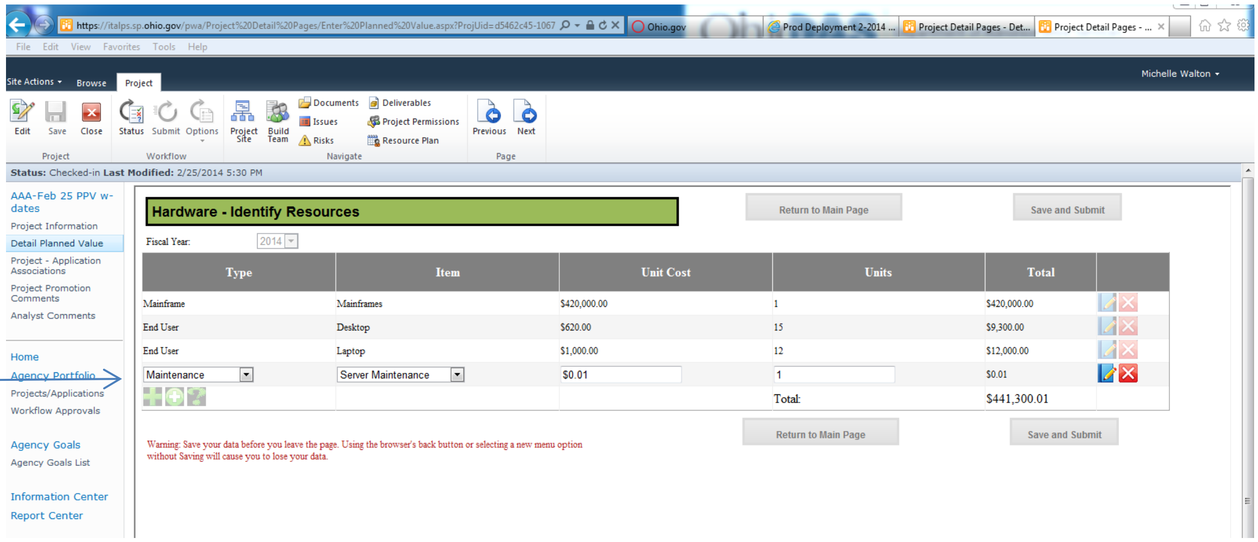
lick on it.

Result: The item you selected is displayed in the **Search** box.



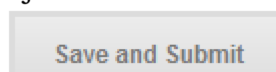
4. Click the Go button.

Result: The system inserts the item into a row on that the Planned Value page.



6. Proceed on this page as described in the ***Build Detailed Planned Value for a Project by Resource Class*** section above.

   CAUTION: Adding an item to a page does not save it to your Project Planned Value!

   Do not exit from this page in any manner without clicking the  button. Even though you have saved each line to the page, the data will be erased if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of lost data.

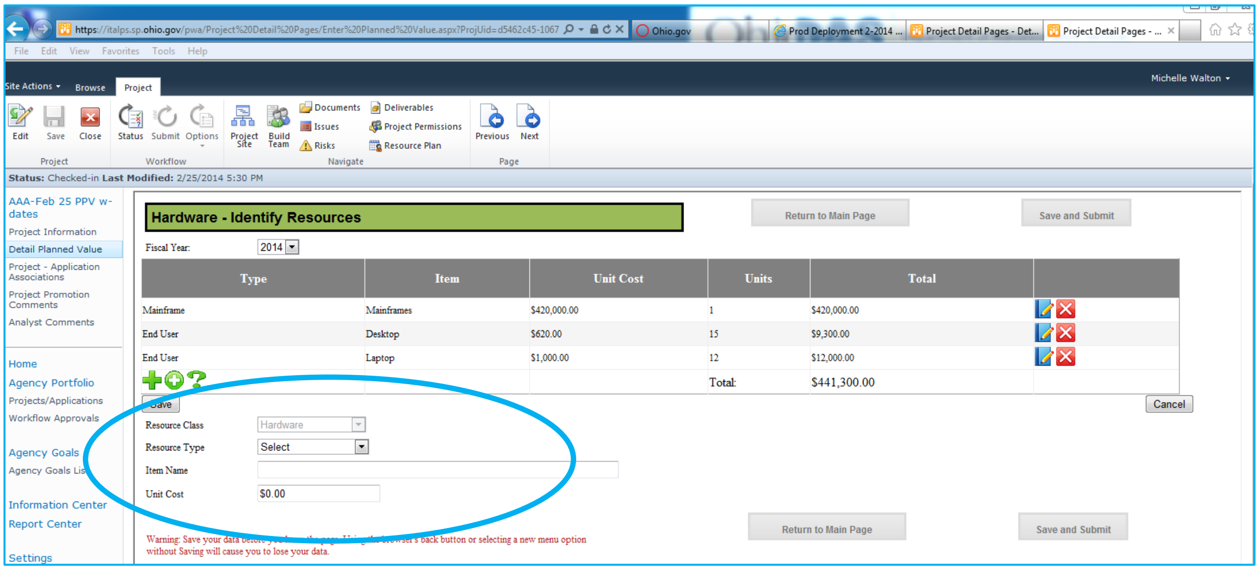
Add a custom item to your Project Planned Value

In almost every case, you should be able locate the Resource Item you need by using the drop-downs or the search to select an item from the Resource Look-up table. In the rare instance where you cannot find the right budget item, you can add a custom item. This item exists only for the Project Planned Value in which you create it. You may also use this feature to temporarily record a budget cost while the project is in the Proposed stage. Once you've determined the item you will actually purchase, you can delete the custom item and make the appropriate selection from the Resource Table.

Note: If you are finished planning your Project and your Project Planned Value still contains a custom item contact your OIT Analyst before you submit the Project to Enterprise Review. Your Analyst may be able to help you find a non-custom item that represents your item, or can help you provide enough information about the custom item so the reviewer will understand your need. If multiple agencies express the need for the same custom item, OIT may add that item to the Resource Table.

1. On the **Identify Resources** page for Labor, Software or Hardware, click the button.

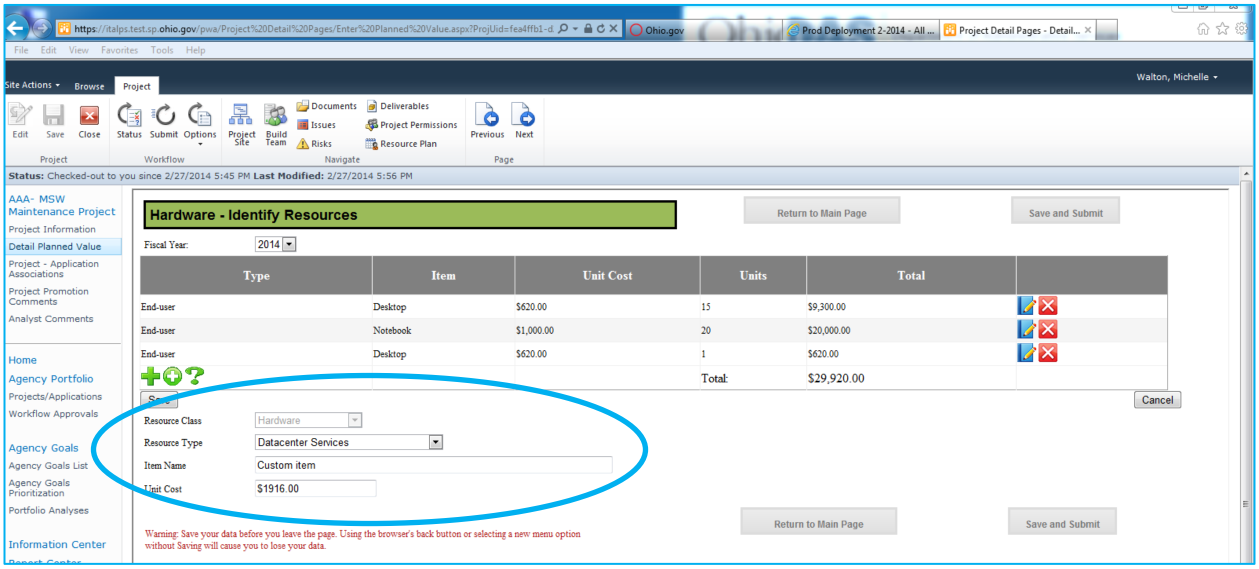
   Result: The custom item pop-up is displayed.



2. The **Resource Class** field is system-populated with the Resource Class defined by the page you are viewing. This drop-down is disabled.
3. In the **Resource Type** field, click the drop-down arrow.

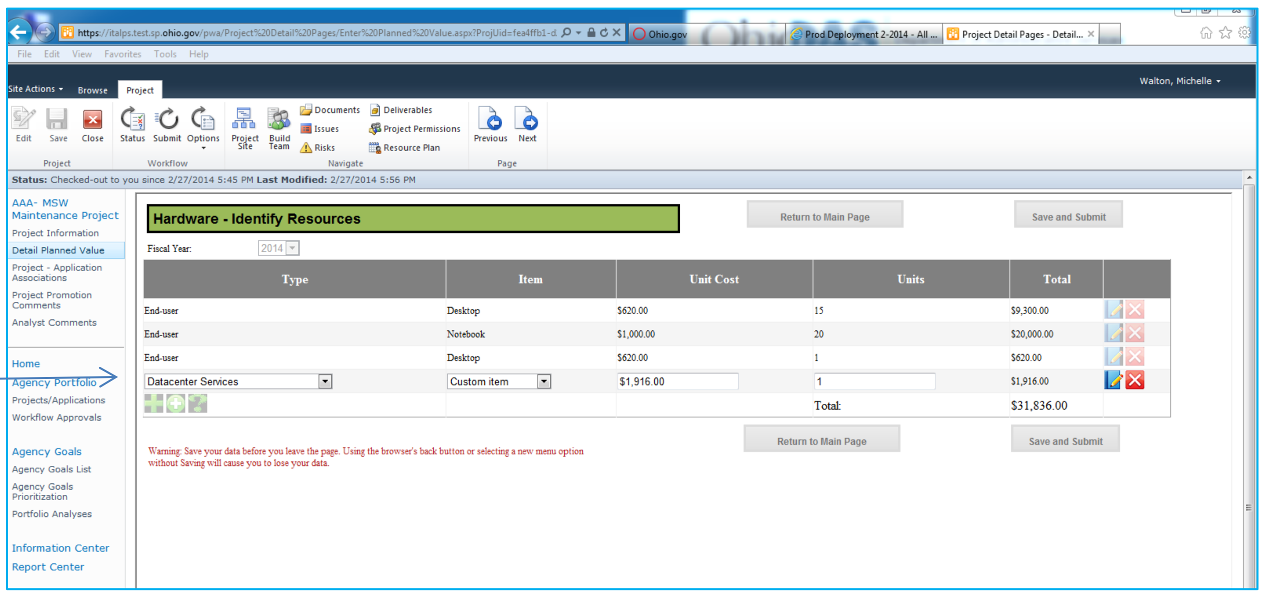
   Result: The system displays a list of the valid Resource Types associated with the Resource Class you are building.

4. Click the Resource Type for which you want to create a custom item.
5. In the **Item Name** field, enter the name of the custom item.
6. In the **Monthly Rate** (Labor) /**Unit Cost** (Software, Hardware) field, enter the amount representing the monthly rate or the cost of one unit of the custom item.



7. Click the **Save** button.

Result: The system inserts the item into a row on that the Planned Value page.



8. Proceed on this page as described in the ***Build Detailed Planned Value for a Project by Resource Class*** section above.

   Caution: Do not enter custom items in the **Enterprise Services** Resource Class. Enterprise Services are services provided by OIT; if the service you need is not an available service from OIT, you will have to obtain that service from another provider/vendor. In that case, you should either find the service in the Resource Class to which it belongs, or create a custom item under that Class.

Delete an item from the Detailed Planned Value for a Project

The Project Planned Value feature allows you to plan the budget for your project. While in the Proposed stage, you may make a number of changes to your Project Planned Value before you submit it for Enterprise Review. In addition to purposeful changes, you may occasionally need to correct an inaccurate entry.

1. On the **Identify Resources** page (any Resource Class), review the items entered there.
2. Click the delete button at the end of the row of the item you wish to delete.

   Result: The system displays a dialog box containg the message "Are you sure you want to delete this record?" , an OK button and a Cancel button.

3. Click Cancel if you do not want to delete the item; click OK if you do want to delete the item.

   Result: If you click Cancel, the dialog box goes away, and the item is not deleted. If you click OK, the screen refreshes and the row with the deleted item is no longer displayed.

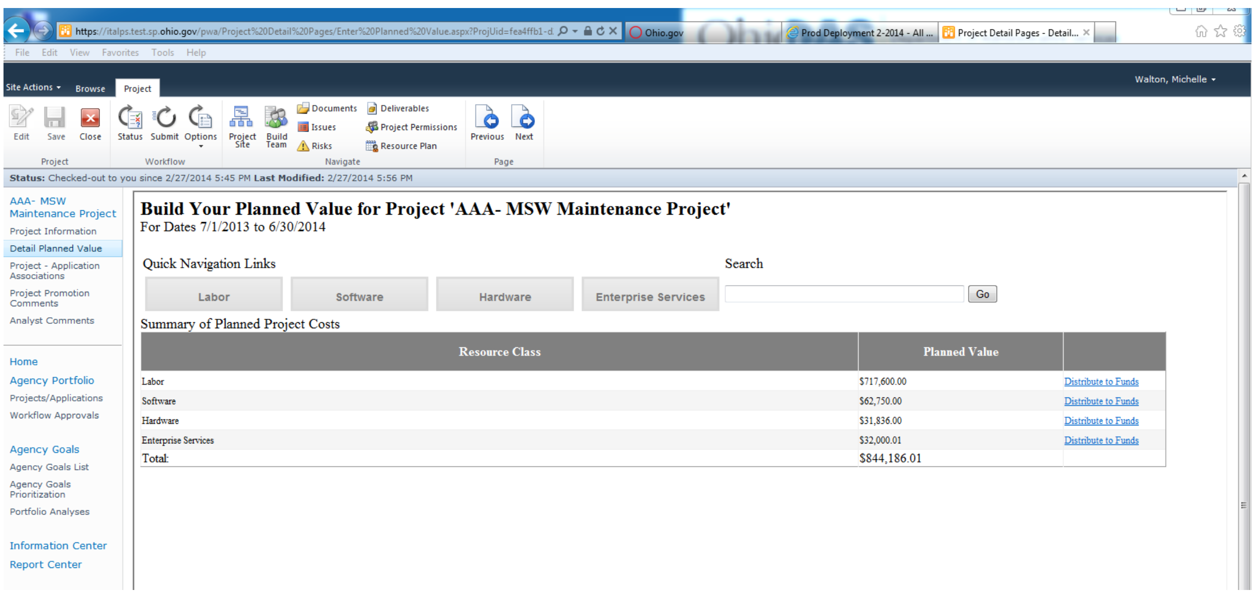
   CAUTION: Deleting an item from the page does not delete it from your Project Planned Value! Do not exit from this page in any manner without clicking the Save and Submit button. Even though you have deleted a line from the page, the data will remain if you leave the page without saving. Saving frequently while adding items to this page will minimize your risk of losing your changes.

Distributing Project Costs to Funding Sources (Cost Centers)

In addition to planning the resources you will need for a project, part of the budgeting process is to identify the funding sources for those costs. The Project Planned Value functionality allows you to distribute your planned costs across the established funding sources (Cost Centers) by Resource Class and Fiscal Year.

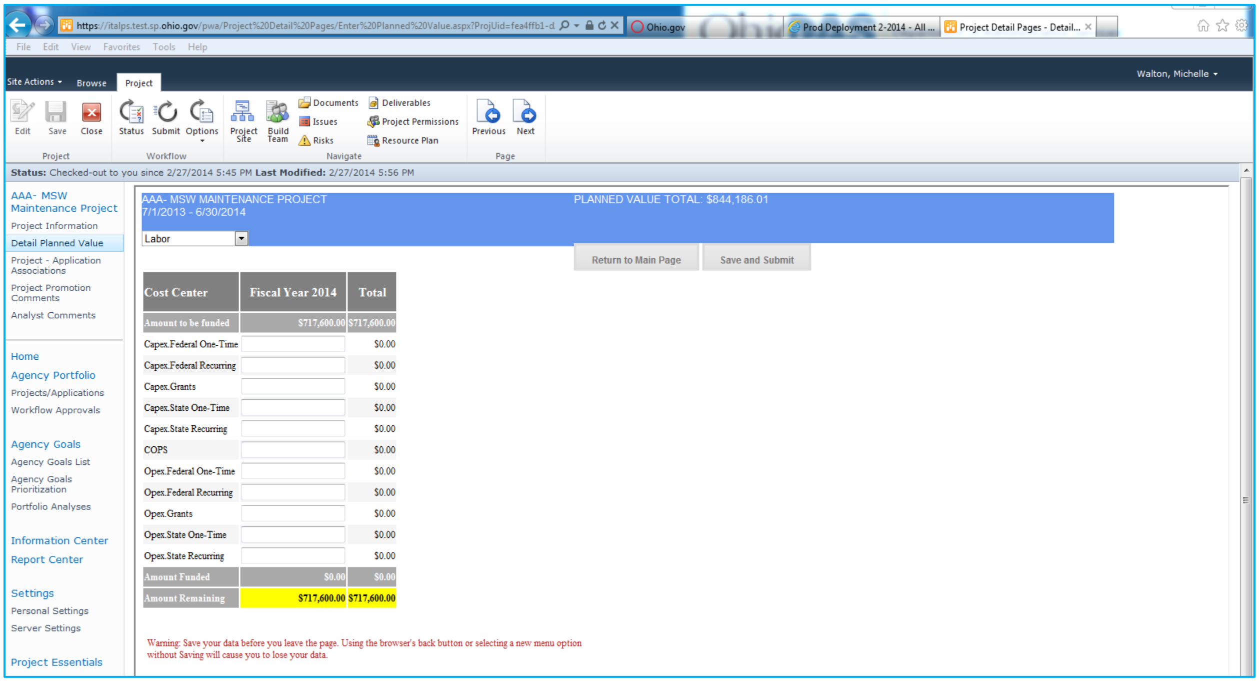
You will distribute your planned costs one Resource Class at a time. You may distribute the costs for a Resource Class as soon as you have finished building the Detailed Planned Value for that Class (see sections above) or you may build the Detailed Planned Value for all Classes and then distribute each one.

1. From the **Build Your Planned Value** page, view the Summary of Planned Project Costs.

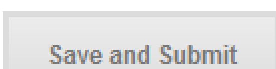


2. Determine which Resource Class (Labor, Software, Hardware or Enterprise Services) you wish to distribute, then click Distribute to Funds next to the right of the total for that Class.

   Result: The Project Planned Value Cost Distribution page is displayed. The values are populated for the Resource Class of the line you selected. For example, if you selected Distribute to Funds on the Labor line, the Labor values will be displayed.



3. The header at the top of the page displays the following:
   - The name of the current Project
   - The date range of this Project's Planned Value. This date range is created by the **Project Cost Start Date** and **Project Cost End Date** entered on the Project Information page.
   - The **Planned Value Total**, which displays the total for all the whole Project.
   - A drop-down that is pre-filled with the Resource Class currently displayed on the page.
4. Beneath the header are two navigation buttons: 

and 

. These buttons may be used at any time while you are on this page. The functionality of each is described later in this section, at the point where it is commonly used.
5. The **Cost Center** column displays the funding sources.

Funding Source	Definition
Opex.Federal One-Time	Operating funds received from the Federal Government that are not expected to be received again (specific purpose one-time funding, non-grants)
Opex.Federal Recurring	Operating Funds received from the Federal Government that are expected to be received year after year
Opex.Grants	Operating funds received from any source for specific purposes that is mutually exclusive from State and Federal (Opex One-Time or Recurring) funds and that are associated to grant agreements
Opex.State One-Time	Operating Funds received from the State once and that are not expected

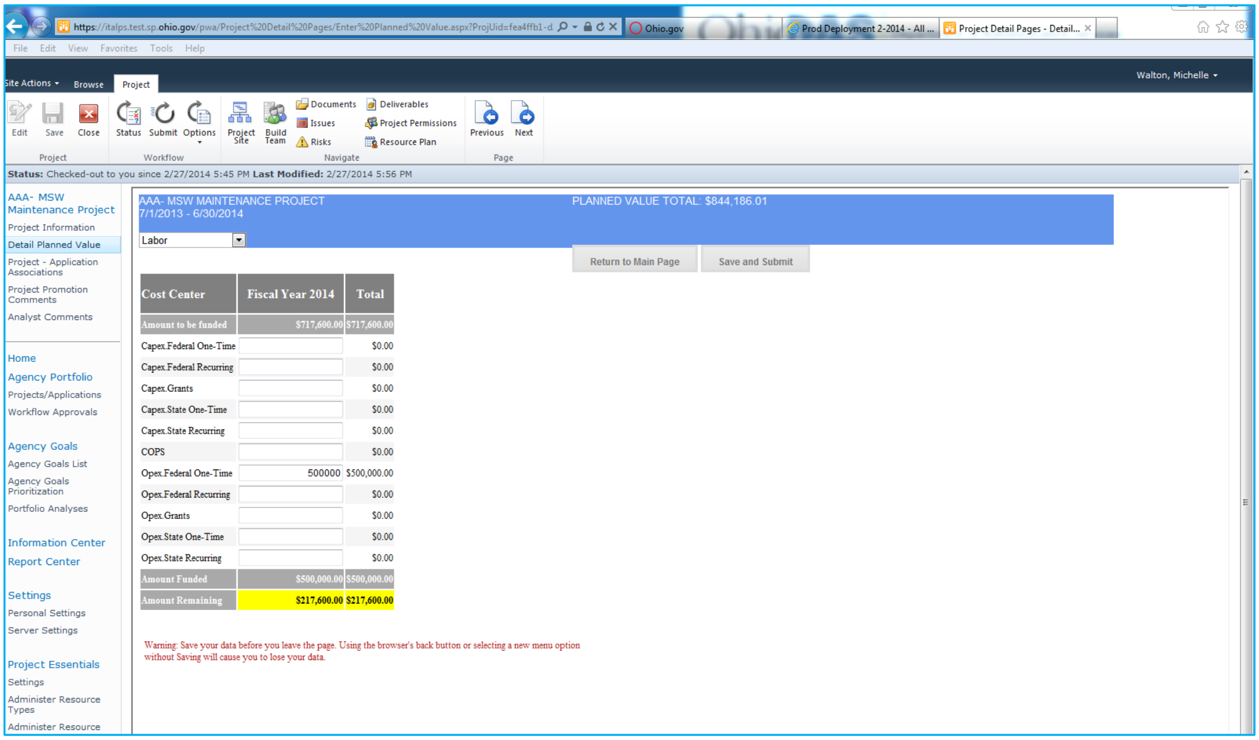
Funding Source	Definition
	again (specific purpose one-time funding, non-grants)
Opex.State Recurring	Operating Funds received from the State and that are expected to be received year after year
Capex.Federal One-Time	Capital Funds received from the Federal Government and that are not expected to be received again (specific purpose one-time funding, non-grants)
Capex.Federal Recurring	Capital Funds received from the Federal Government that are expected to be received year after year
Capex.Grants	Capital Funds received from any source for specific purposes, that are mutually exclusive from State and Federal (Capex One-Time or Recurring) funds and that are associated to grant agreements
Capex.State One-Time	Capital Funds Operating Funds received from the state once and that are not expected again (specific purpose one-time funding, non-grants)
Capex.State Recurring	Capital Funds received from the State and that are expected year after year
COPS	Certificates of Participation
Unallocated	Cost Center dimension is not earmarked. In the context of IT ALPS unallocated should always be blank or zero ($0)

6. One **Fiscal Year** column is displayed for each Fiscal Year included in the planned lifecycle of your Project. The Fiscal Years in Project are defined by the **Project Cost Start Date** and **Project Cost End Date** entered on the Project Information page. The **Fiscal Year** columns displayed will correspond to this date range, which is also displayed in the page header.

   Note: If your Project includes Fiscal Years for which you have not yet entered any Planned Value costs, the Fiscal Year columns for those years will display $0.00.

7. The **Total** column displays the sum of all fiscal year amounts for each Cost Center.
8. The **Amount to be Funded** row displays planned costs for the displayed Resource Class by Fiscal Year. The amount in the **Total** column of the **Amount to be Funded** row will match the amount displayed in the **Summary of Planned Costs** on the Build Your **Planned Value** page.
9. The **Amount Funded** row beneath the last Cost Center row (Opex.State.Recurring) displays the planned costs that you have distributed. When you enter this page for the first time, each amount in the **Amount Funded** row will be $0.00. As you distribute funds to Cost Centers, the **Amount Funded** amounts increase by the corresponding amount.
10. The **Amount Remaining** row keeps a running total of planned costs that are yet to be distributed for this Resource Class. When you enter this page for the first time, the amount in the Total column of the **Amount to be Funded** row will match the amount displayed in the **Summary of Planned Costs** on the Build Your **Planned Value** page. As you distribute funds to Cost Centers, the **Amount to be Funded** amounts decrease by the corresponding amount. While the amount is greater than $0.00, the field will be highlighted in yellow. When you have distributed all of the

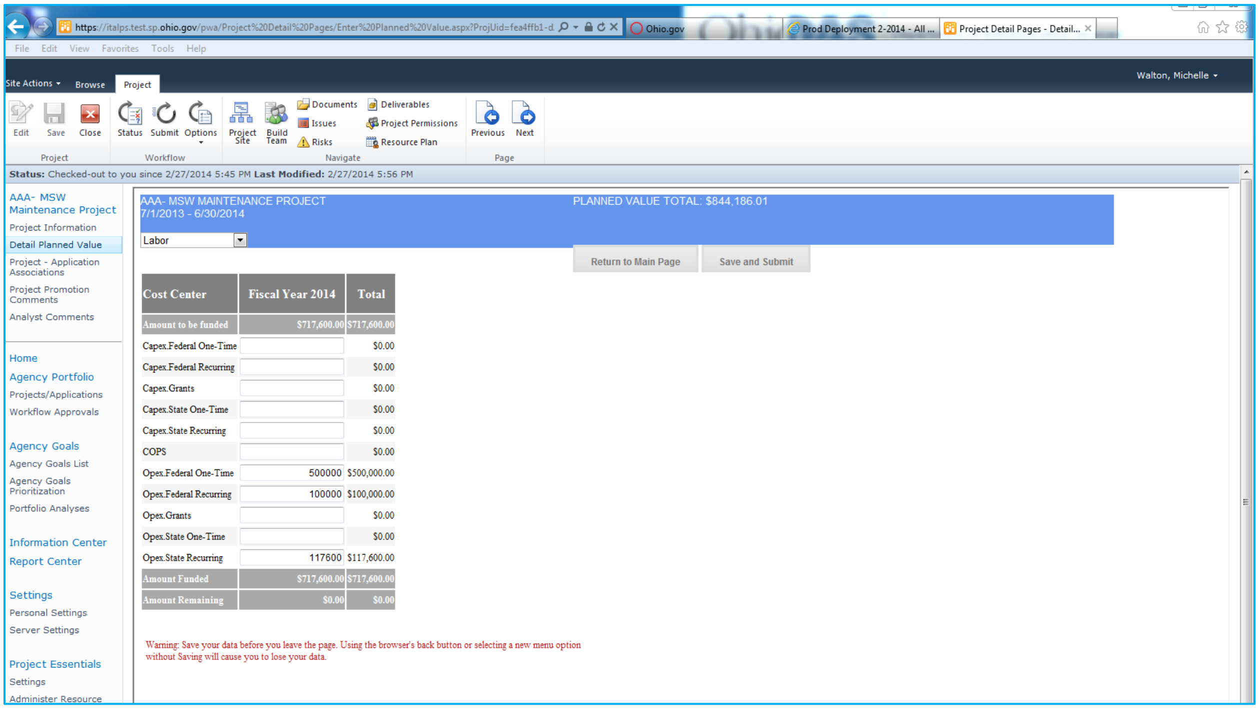
costs for this Resource Class, each amount in the **Amount to be Funded** row will be $0.00 and the field will display in gray.

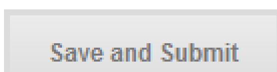


11. Allocate your planned value costs by entering the appropriate dollar amounts in the corresponding **Cost Center** / **Fiscal Year** field.

    Note: You do not need to enter the dollar sign, commas, or a decimal point to enter whole dollar amounts. The system will add the dollar sign, commas and a decimal point followed by 00 after you save and leave the page. If you wish to enter cents, you may enter a decimal point along with the appropriate two digits following it (e.g., .42). This should be used rarely, as DAS recommends that budgets (Planned Values) are maintained in whole dollars.

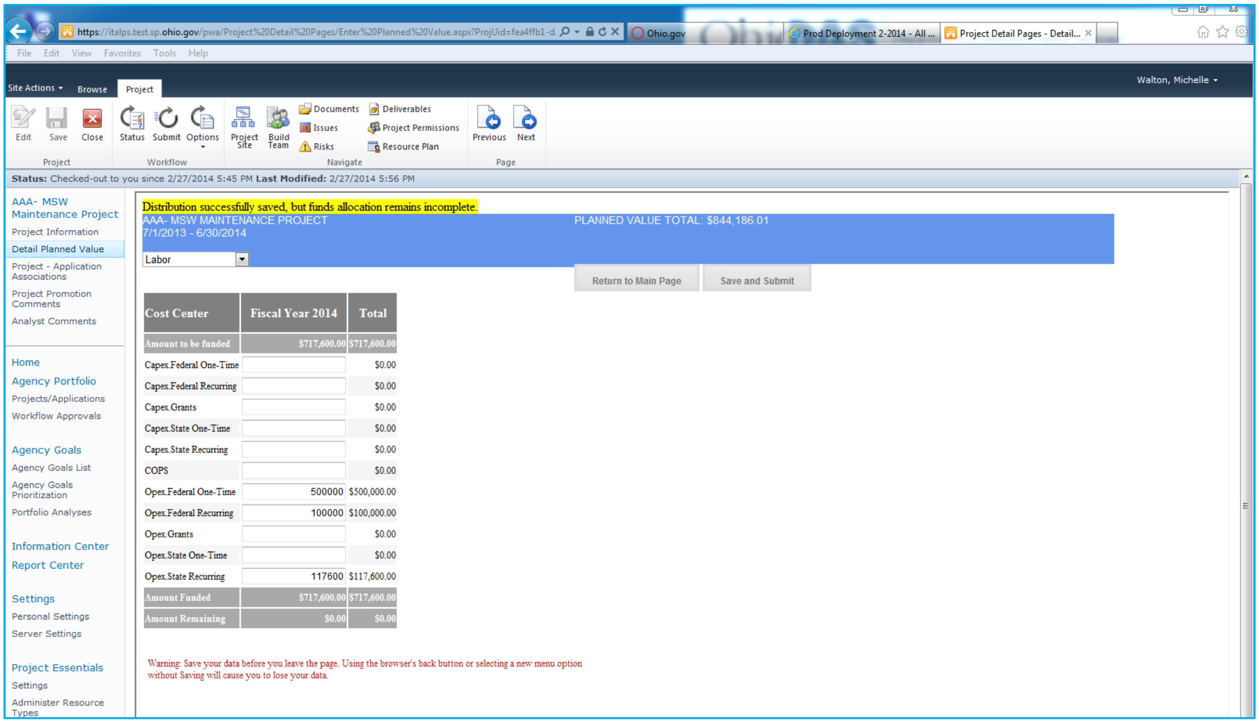
    Result: In the Fiscal Year column where you entered an amount, the **Amount Funded** increases value increases and the **Amount Remaining** decreases.



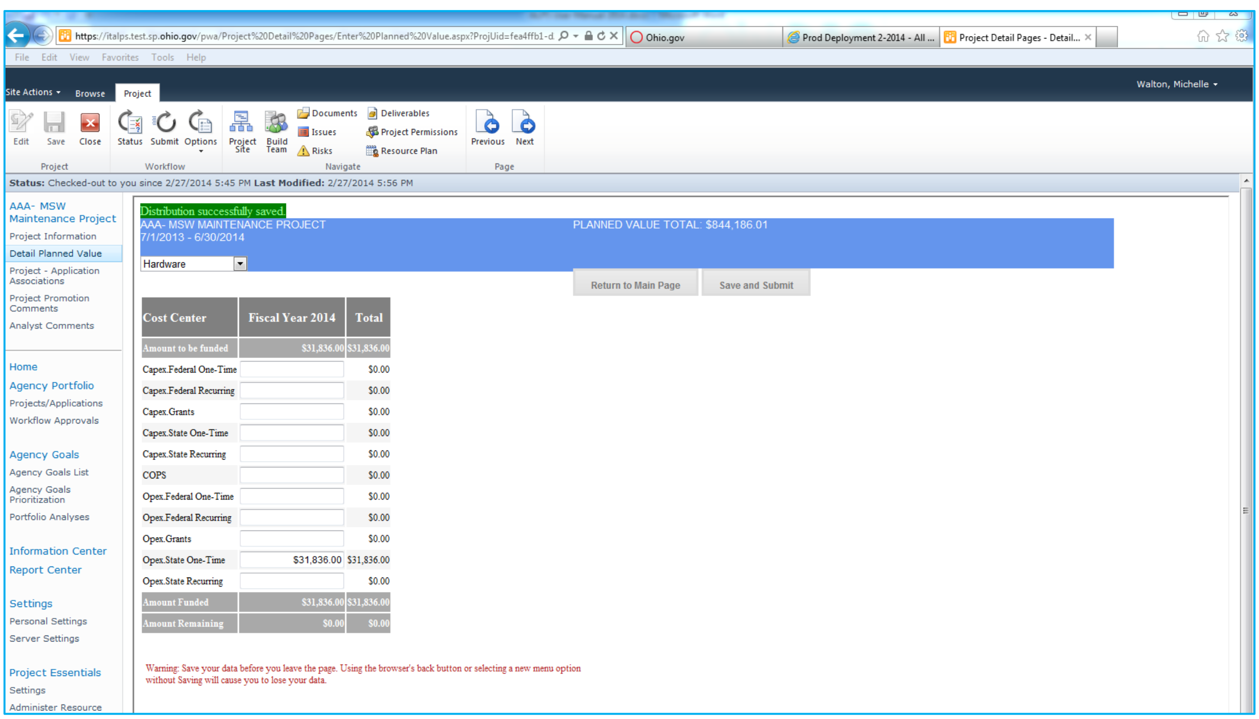
12. Click the  button.

Result: Your changes will be saved as follows:

- If you have not completely distributed the costs for this Resource Class: Your changes will be saved, but no confirmation message will be displayed.
- If you have completely distributed the costs for this Resource Class but costs in other classes of your Project Planned Value remain undistributed: Your changes will be saved. This confirmation message will be displayed: Distribution successfully saved, but funds allocation remains incomplete.



- If you have completely distributed the costs for this Resource Class as well as all other costs in this Project's Planned Value: Your changes will be saved. This confirmation message will be displayed: Distribution successfully saved.



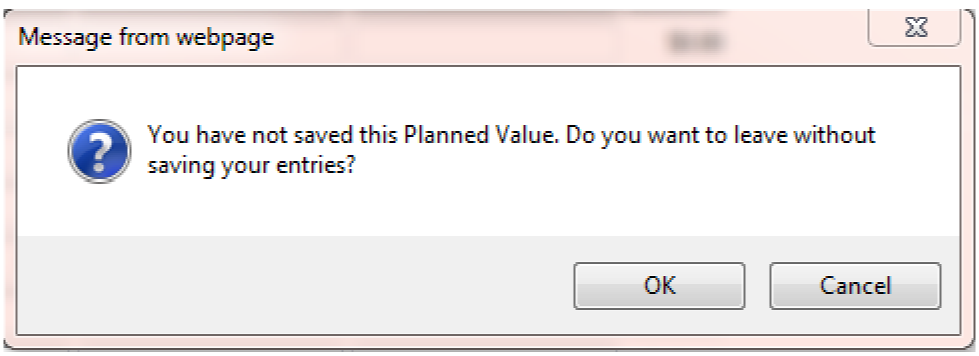
Note: You do not have to save after every entry, but we recommend that you save frequently to avoid losing your changes.

13. Return to the drop-down in the header to move on to another Resource Class. You do not need to completely distribute your funds during this session. You may save your changes and return to complete the distribution at a later date.

14. Click the **Return to Main Page** button.

Result: If all changes have been previously saved, the Build Your Planned Value page will be displayed.

If changes have not been saved, a dialog box will open to ask if you wish to continue.



15. Click **OK** to leave without saving; click **Cancel** to remain on the page and make additional changes or click **Save and Submit**.

Caution: The unsaved data dialog box is not displayed if you use your browser's back button or click on another menu option from this page. Unless you made changes that you don't want to save, DAS recommends that you always click **Save and Submit** prior to clicking **Return to Main Page**.

Promoting a Project from Proposed to Execution

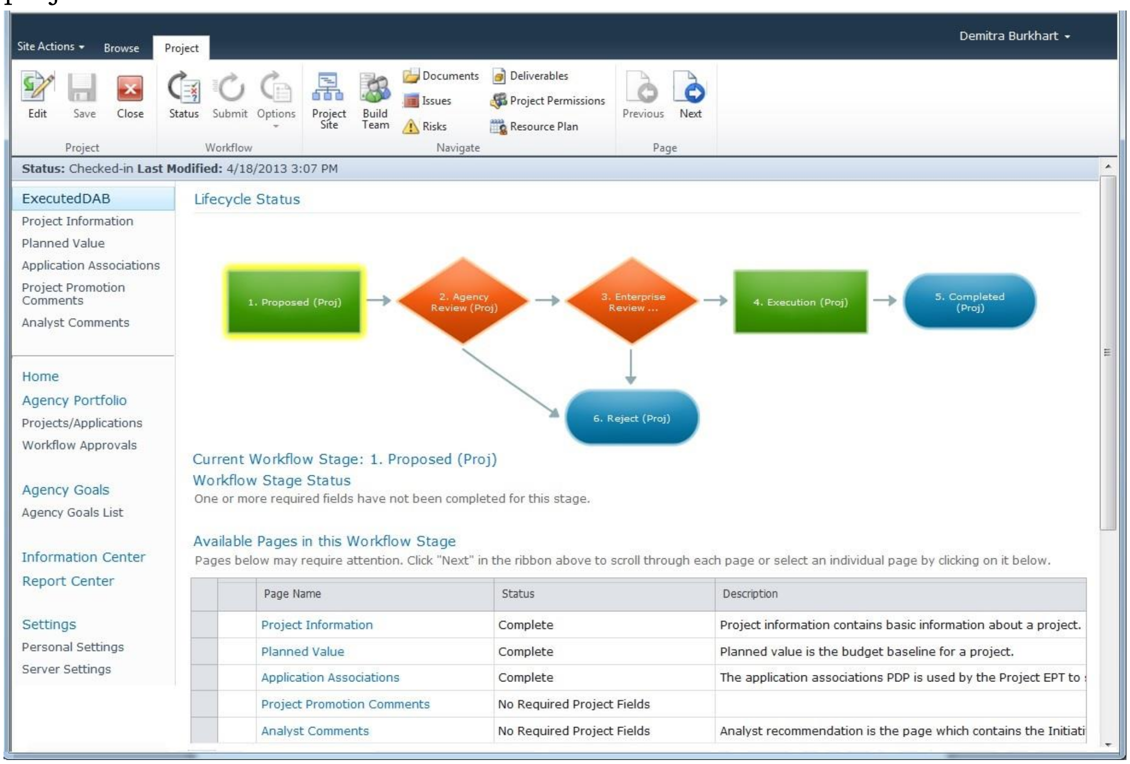
After you have entered your project's information, including the project's planned value and associated the project to an application; you should be ready to request approval of your project.

As you can see in the Project Lifecycle, projects pass through two review gates: Agency Review and Enterprise Review.

Requesting Approval at the Agency Level

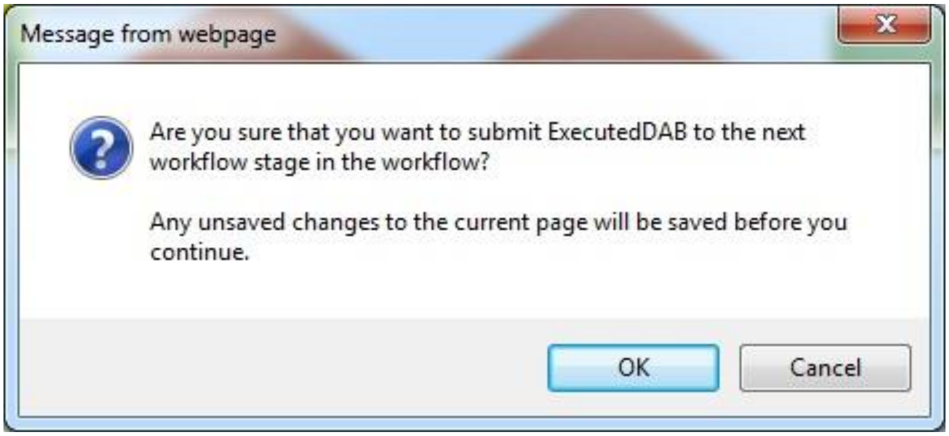
The instructions below assume that you are on the project lifecycle page for the project you would like to submit for agency review. If you are not on that page, navigate there before following the instructions below:

1. From the **Project Lifecycle** page, on the toolbar, click the **Edit**  to check-out the project.

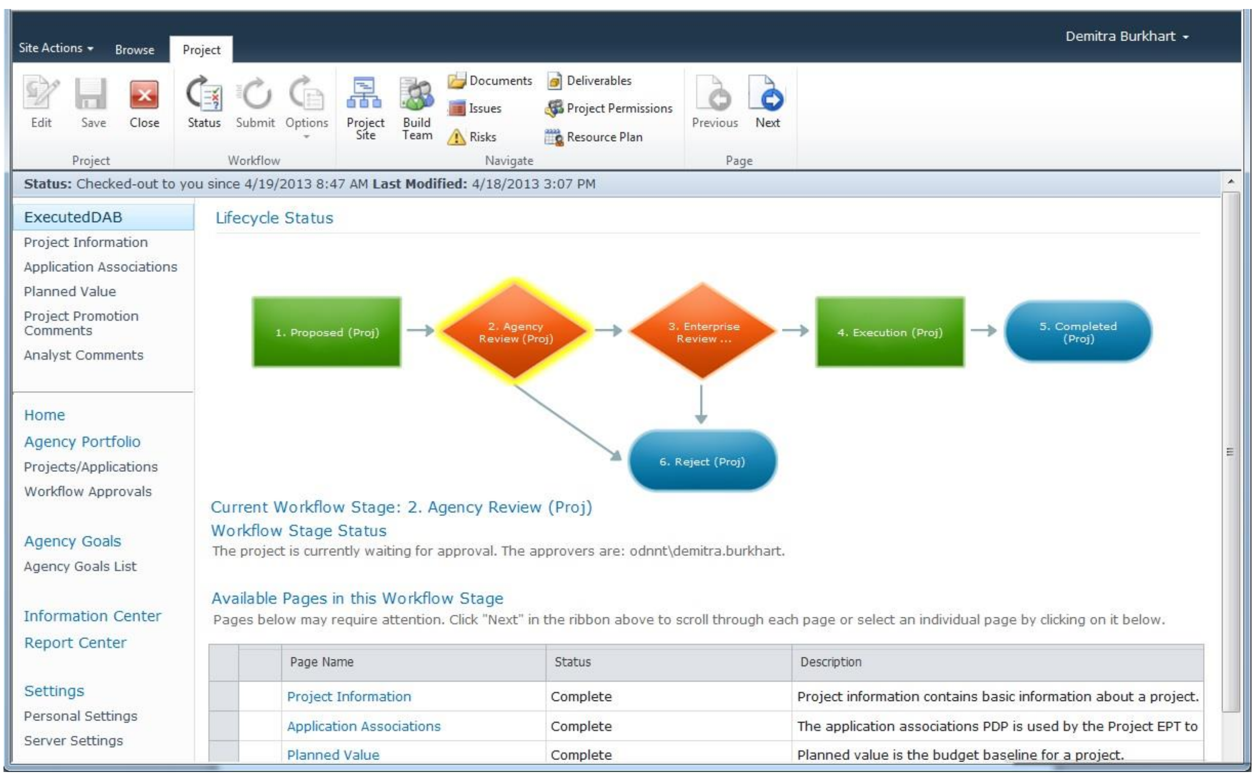


Result: The system updates the status to display the project file as checked-out.

2. On the toolbar, select **Submit** to move the project to the **Agency Review** step in the lifecycle.
   Result: The system displays a confirmation dialog box.



3. To confirm that you want to submit your project for agency review, click **OK**.
   Result: The system refreshes the **Project Lifecycle Status** page and initiates a workflow, sending an email to the agency approver requesting approval.



4. To check-in the project, click **Close**.
   Result: The system displays the **Close** dialog box.

5. Click **Yes**.
   Result: The system closes the dialog box and displays the project work center.

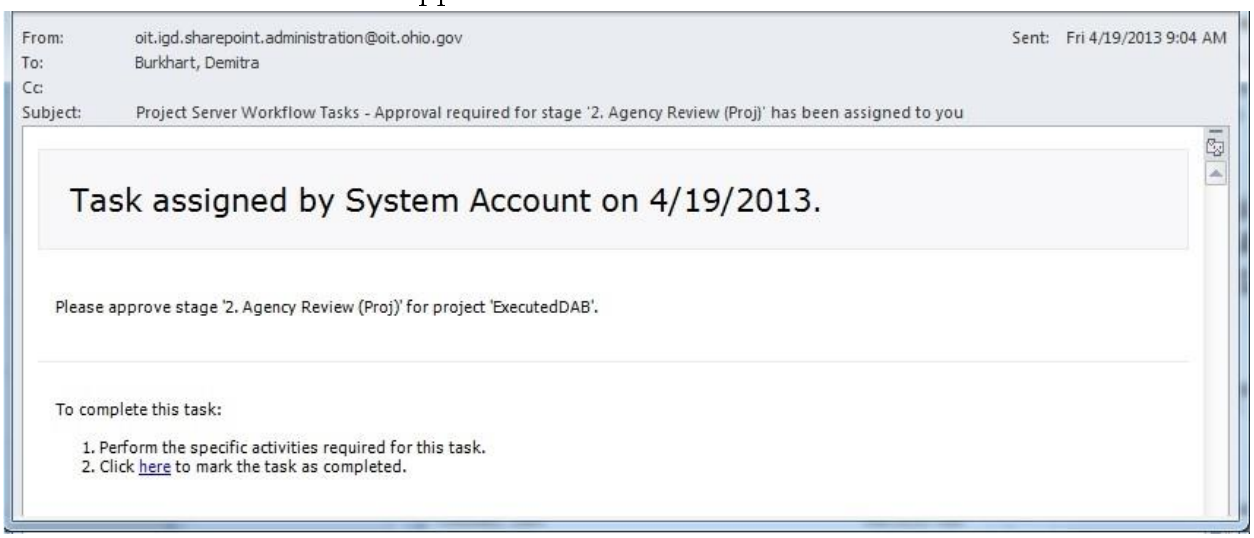
Conducting Agency Review

This section discusses how to promote a project from the Agency Review gate to the Enterprise Review gate. In order to complete the steps in this section, you will need to be setup as an Agency Approver in IT ALPS.

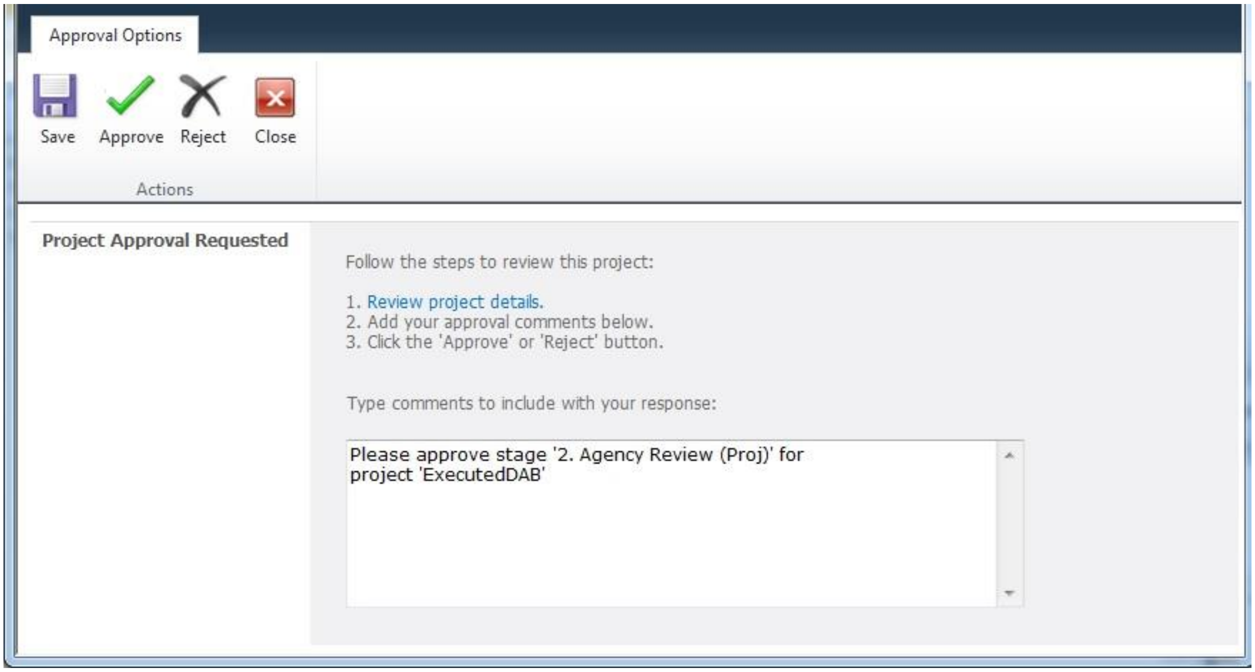
Agency Review – Approval from e-mail notification

If you are an Agency Approver, you will receive an email notification when a project has been submitted for your review/approval. The email will be from oit.igd.sharepoint.administration@oit.ohio.gov.

1. To review the project, open the email notification.
   Result: The email contains approval instructions.



2. In step 2 of the instructions in the email, click the “here” link.
   Result: The system displays the **Project Approval Requested** window.



3. To review the project’s information to make a determination of whether to promote the project for enterprise review, click “Review project details.”
   Result: The system displays the project information. Review the information as you deem necessary to make your determination of approval.

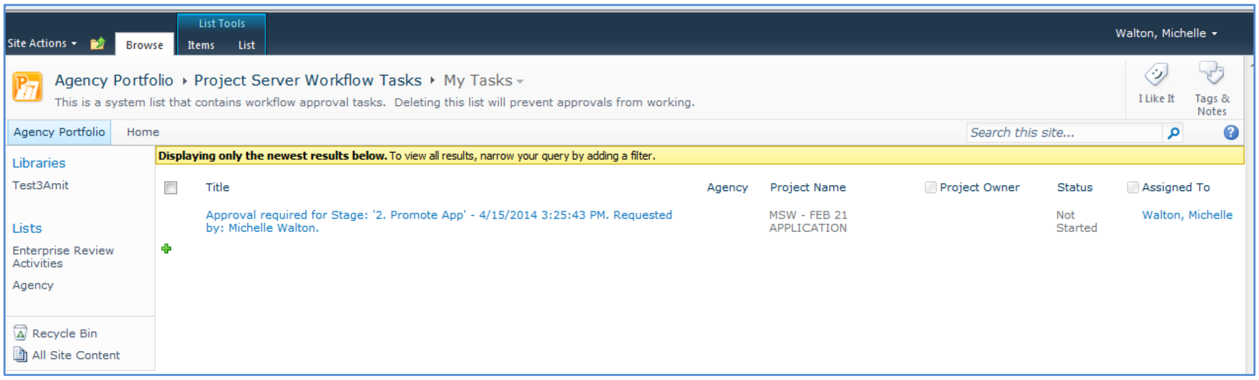
4. To approve the project, click **Approve** ✓ to move the lifecycle to the **Enterprise Review** step.
   Result: The system closes the **Project Approval Requested** window and opens the project work center page. The status displays the project at the **Enterprise Review** step.

Agency Review – Approval from within ALPS

If you are an Agency Approver and wish to approve a project without accessing your e-mail notification, you may do so from within ALPS.

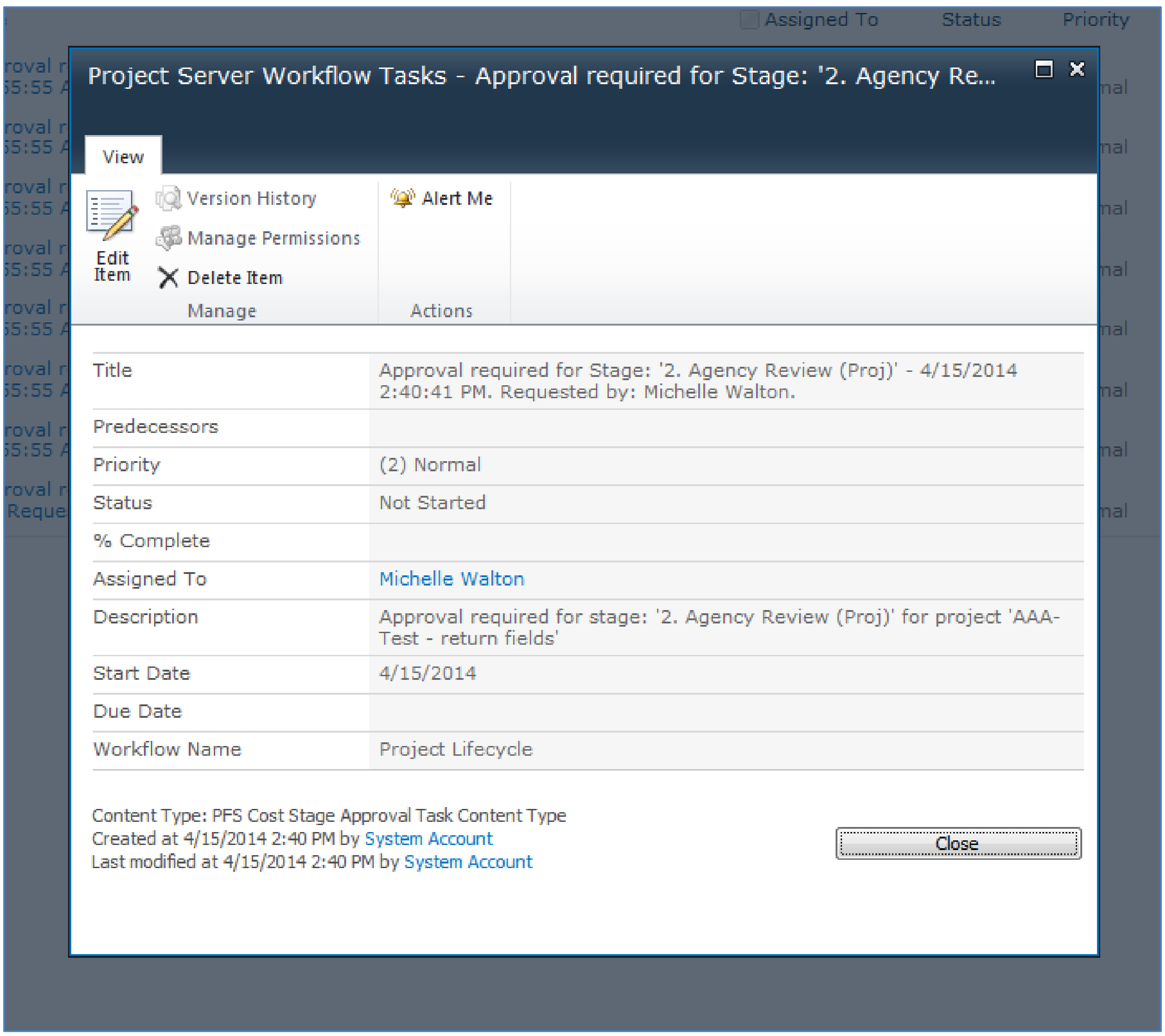
1. From the Area Navigation Bar, select **Workflow Approvals**.

   Result: The system will display a list of Workflow Tasks that are assigned to you.



2. Click on the task you wish to approve.

Result: A pop-up window displays information about the Workflow Task.



3. Click the Edit Item button 

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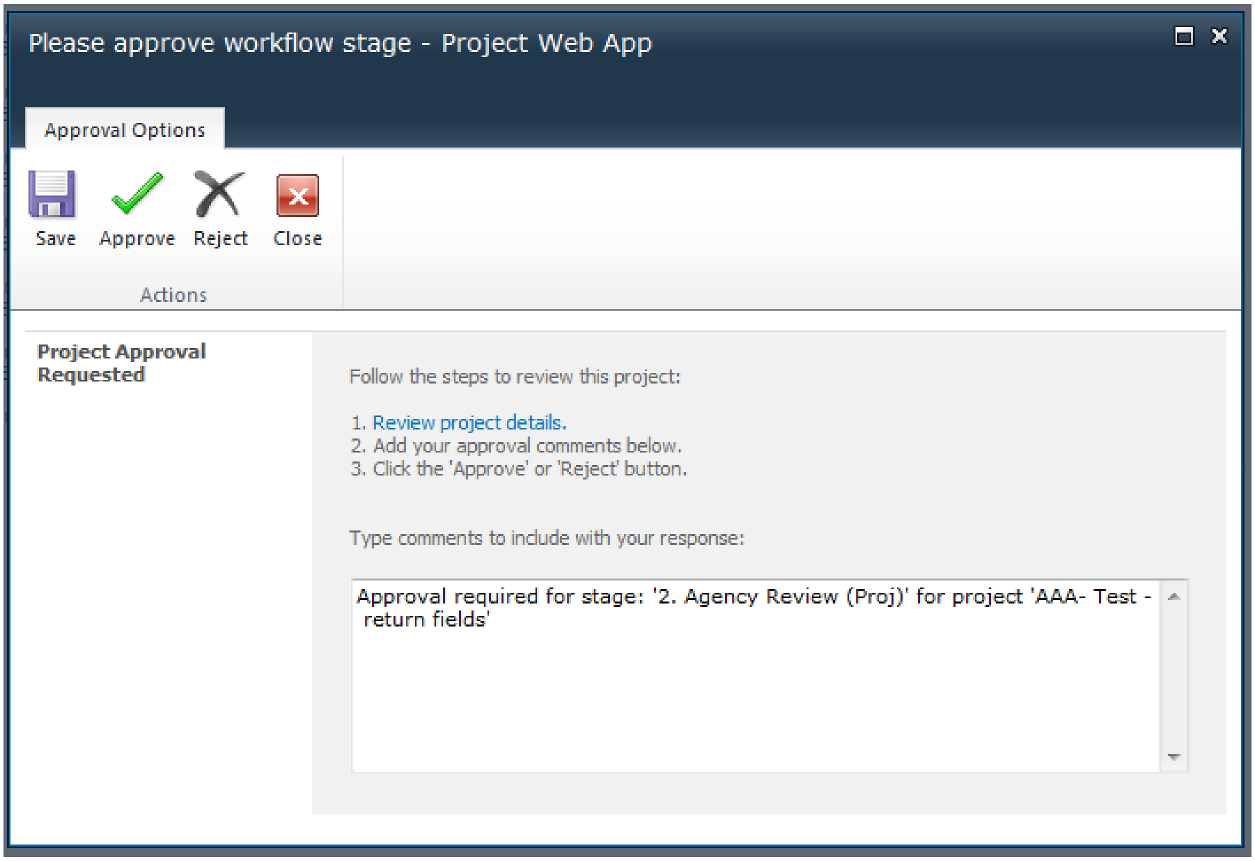
Result: The system displays the **Project Approval Requested** window, with the same options as described above in the ***Agency Review – Approval from e-mail notification*** section.



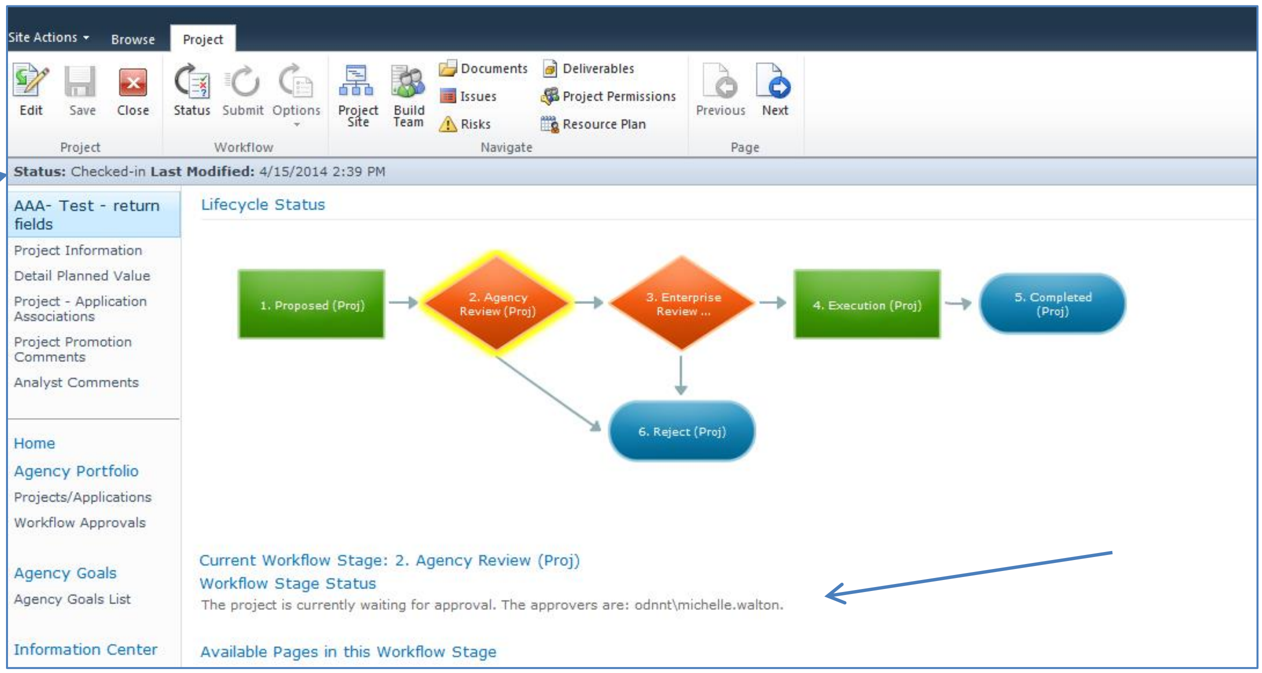
5. To review the project's information to make a determination of whether to promote the project for enterprise review, click "Review project details."
   Result: The system displays the project information. Review the information as you deem necessary to make your determination of approval.

6. To approve the project, click **Approve** ✓ to move the lifecycle to the **Enterprise Review** step.
   Result: The system closes the **Project Approval Requested** window and opens the project work center page. The status displays the project at the **Enterprise Review** step.

What is my workflow tasks don't display?

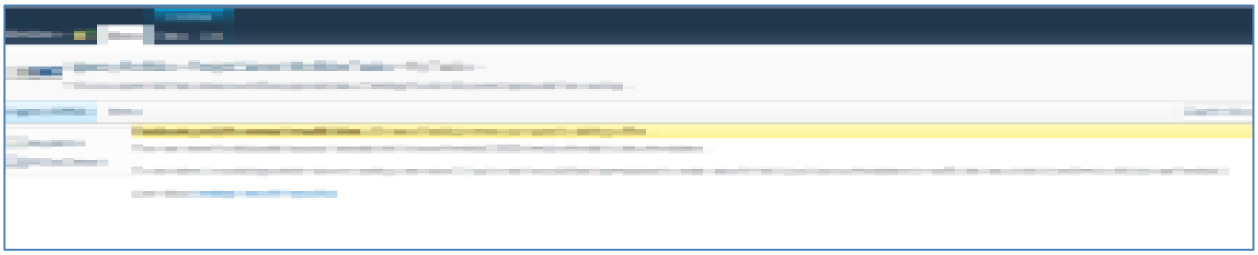
There are a number of reasons why Approval tasks may not be displayed. For troubleshooting purposes, this section describes the most common ones.

1. A common reason why you don't see an Approval task you expect to see is that the Project is not actually awaiting your review. The easiest way to check this is to go to the Project Lifecycle page of the Project you expected to review.

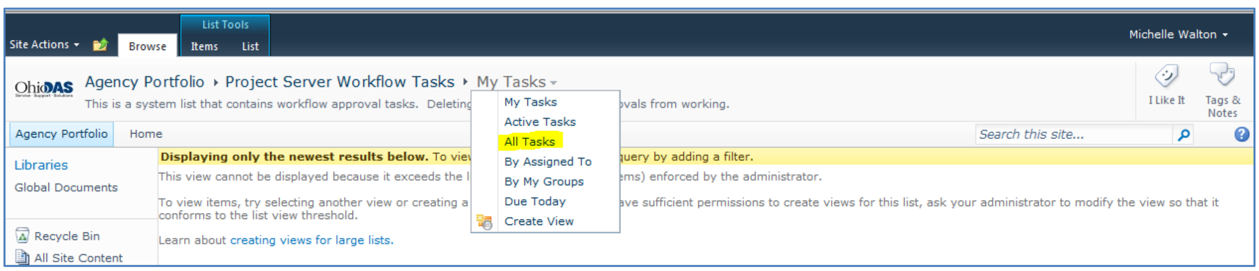


2. On this page, do as many of the following things as necessary to resolve the issue:
    a. Verify that the project is in the Agency Review stage.
        i. If the project is in the Agency Review stage, check to see which reviewer(s) have been assigned to this project. Do this by checking the Workflow Stage Status section in the middle of the page, or by expanding the All Workflow Stages section near the bottom of the page.
        ii. If the project is still in the Proposed stage, work with the appropriate user to make sure it is promoted to the Agency Review stage.
        iii. If the project has already been promoted to Enterprise Review, then another Agency Approver has already approved the project.Check the Project Promotion Comments page to see that reviewers comments.
    b. Check to see if the project is checked out to someone else. You can see this is in the Status: line below the tool bar.

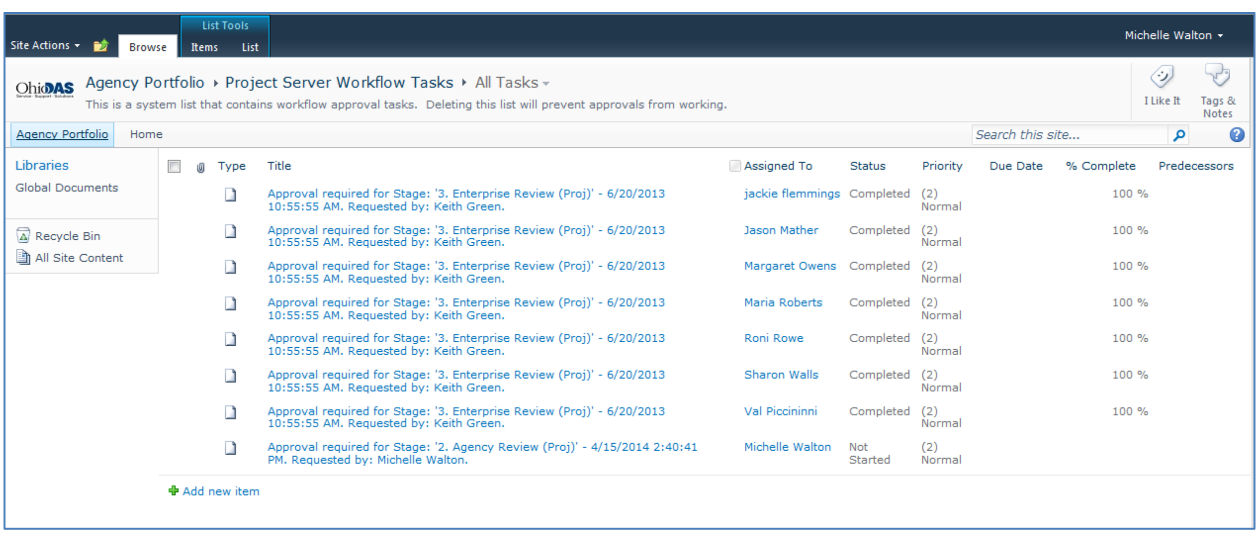
3. Another common reason that tasks don't display is a technical one: Instead of seeing your tasks, you will see the message below. If you see this message, please report it to your OIT Analyst or other OIT contact and follow the directions below to work around it.



4. Select the dropdown arrow next to the words "My Tasks" click on "All Tasks".



5. A list of tasks is displayed that includes your tasks along with those assigned to others. Because this workaroud may produce a long list and therefore make it difficult to find the task you want, this is only a temporary workaround. Following your call, DAS/OIT will correct this problem.



6. Click on the approval you wish to process.

Agency Review – What if I don't want to approve the Project?

You may review a Project and decide that you don't want to approve it. What you do next depends on whether or not you ever want to approve the Project.

Warning: Use the Reject button 

ONLY if you wish for the project to be denied completely and permanently!

If may approve the project in the future, but can't do so right now (for example, if you need more information), **do not** reject the project. A future ALPS enhancement will offer you the option to return the Project to the Proposed stage. Until this enhancement is delivered, do one of the following:

- Work with the Project Initiator and/or others in your Agency to obtain the necessary information. As an Agency Approver, you may enter that information into ALPS in the same way as the Agency User would. When you are satisfied, follow the directions for Approval in the previous sections.
- If you are unable to work directly with the Agency User, or if for any reason the Project must be returned to the Proposed stage, contact your OIT Analyst. S/He can arrange to have the project forced back to the Proposed workflow stage.

Requesting Approval at the Enterprise Level

When the project is approved at the agency level, it is automatically submitted for Enterprise Review. No additional action is needed on the part of the user to request this review.

The Strategy & Investment Management (SIM) team reviews the project information provided before making the determination to approve the project and move it to the Execution lifecycle phase.

Once the project is in Execution, you may use some of ALPS optional features to track the project's budget in smaller timeframe increments.

Adding Estimate at Completion (EAC) Information for a Project

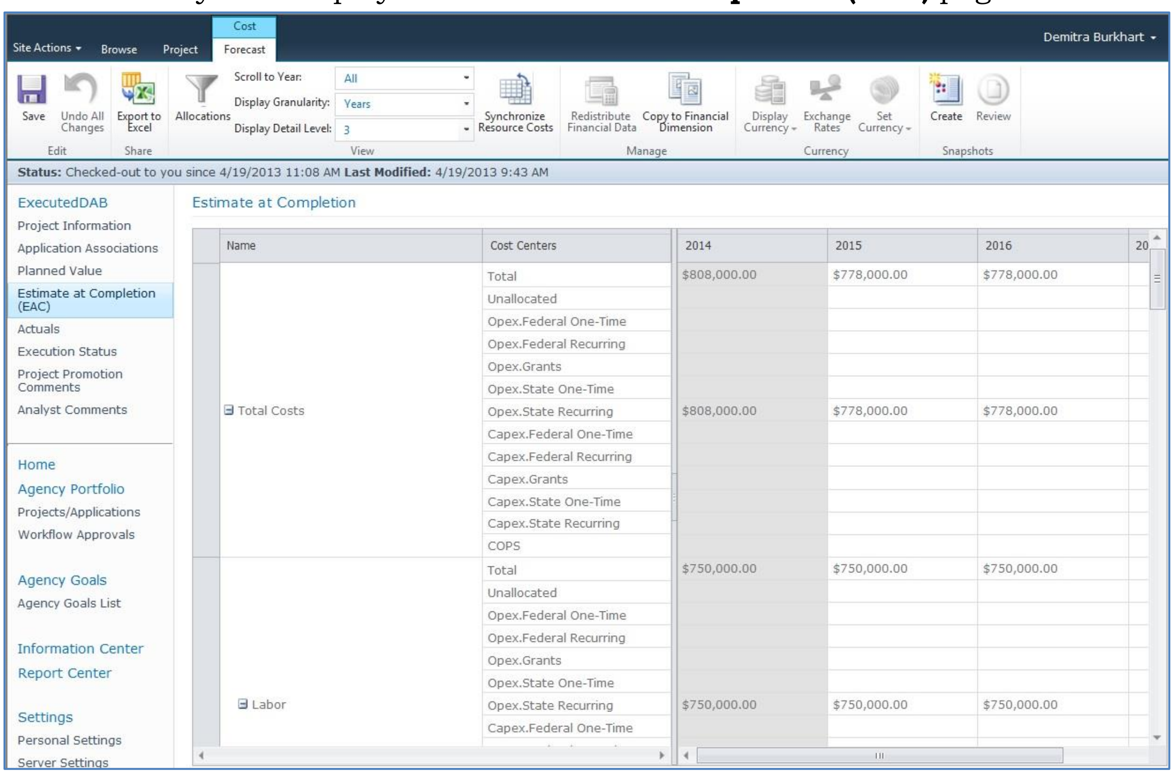
Some agencies may wish to track their budgets in smaller timeframe increments - such as monthly - after the project is in the Execution lifecycle stage. This section describes the ***Optional*** opportunity to redistribute your budgeted project costs by Semester, Quarter or Month and compare them to your actual costs. When the project was initially entered in the *Proposed* lifecycle stage, the **Project Planned Value** information entered was a budget estimate. When the project is in the *Proposed* stage, the system provides the capability to edit the **Project Planned Value**. However, once the project is in the *Execution* stage, the system locks the **Project Planned Value** and displays the information as read-only.

At the *Execution* stage, the system takes the values entered in the **Planned Value**, and breaks the budget out into a monthly view, allowing you to edit/refine the budget to reflect a more accurate display of the project costs on the Estimate At Completion (EAC) page.

In order to manually enter Estimate at Completion Information, the project needs to be in the Execution phase of its lifecycle.

Note: The steps in this section assume that you have the project lifecycle screen for the project open.

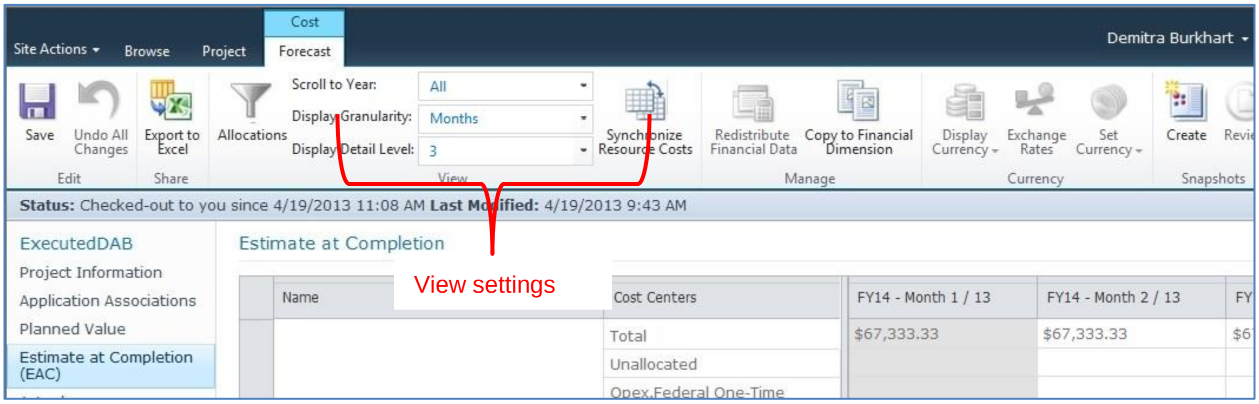
1. On the Project toolbar, click **Edit**  to check-out the project file.
   Result: The system checks the file out to you and indicates that in the Status bar.
2. From the Area Navigation Bar, select **Estimate at Completion (EAC)**.
   Result: The system displays the **Estimate at Completion (EAC)** page.



3. Select the **Cost/Forecast** tab above the Toolbar, and set the **View** settings as desired:

   - Scroll to Year: **All or individual fiscal year**

- Display Granularity: Years, Semesters, Quarters, **Months**
- Display Detail Level: **2 or 1.** Note: Level 3 is no longer in use. The option will be removed in a future release.



Result: The system breaks down the IT Planned Values (previously entered) and displays the budget in the time increments specified in your View settings.

4. In the Estimate at Completion table, scroll to the appropriate Name/Cost Centers cell and enter the forecasted budget amount in the appropriate date fields.
   Note: The system auto-formats the amount, adding dollar signs and commas. When entering a whole number, the system automatically adds the decimal points. For example, enter 50000000 and the system formats the amount to $500,000.00. If the amount is not a whole number, include the decimal point in your entry. For example, enter 500250.50, and the system will auto format the amount to $500,250.50.

5. Verify the total budget for each time period is changing appropriately.

6. After you have made all of your budget adjustments, on the toolbar, click **Save**  to save the changes made on the EAC page.
   Result: The system processes the request, displays a confirmation message, and refreshes the page.

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