



# Enterprise Planning Portfolio

Decision Lens Training

Maintaining your Portfolio

**Strategy and Investment Management (SIM)**  
**Office of Information Technology**

 **Ohio** | Department of  
Administrative Services

# Training Agenda

- Introduction
- Enterprise Planning Process (EPP) Overview
- Decision Lens Overview
- Maintaining Your Portfolio

# Enterprise Planning Portfolio (EPP)

- The Strategy and Investment Management Division within the Office of Information Technology (OIT) facilitates the EPP process
- The State of Ohio EPP contains 30 separate agency portfolios
- Information submitted by the agencies is used to support statewide strategic alignment

# EPP Process Overview

- Collect agency initiatives at the beginning of every Fiscal Year and Quarterly Portfolio updates
- Perform analysis to identify opportunities for **shared services, agency collaboration, standardization & volume purchases**
- Integration with Agency, DAS & OBM Governance processes

# Decision Making Framework

- Provides guidance to the agency to determine which initiatives should be added to the Portfolio
- Covers a wide range coverage of initiatives from agency specific, mission critical to business transformation, technology innovation, and integration with enterprise services

# Decision Lens

- Decision Lens is the technology enabler for the State of Ohio EPP process
- Beyond Strategic Planning, this tool enables prioritizing initiatives for critical decision making as part of the agency governance process

# Decision Lens Software





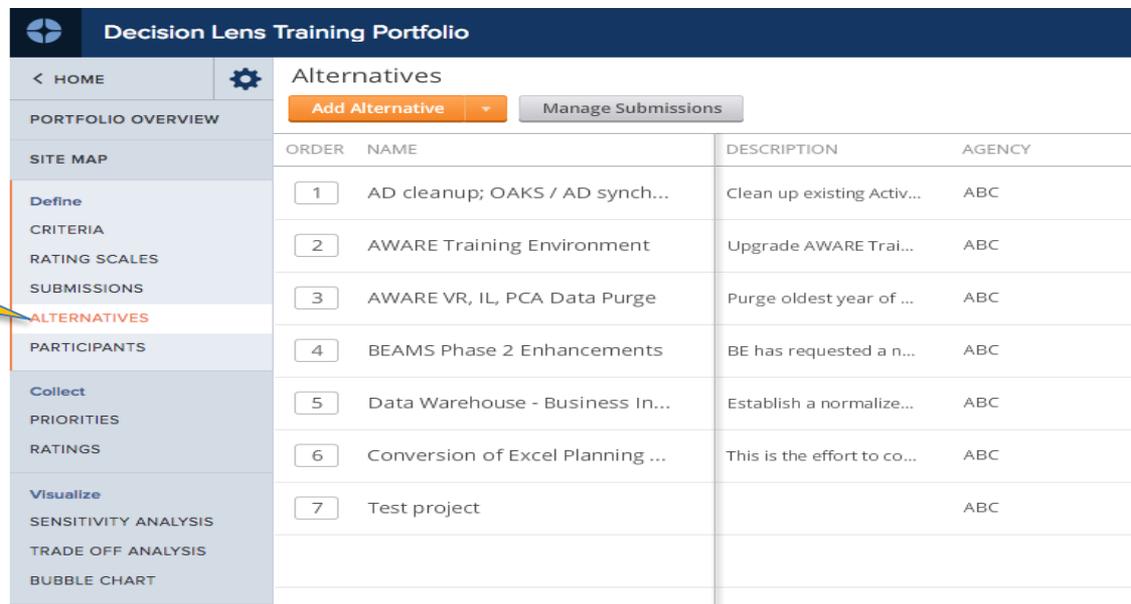
# Maintaining Your Portfolio

# Log In to Decision Lens

- Use your state email and password that you setup:  
<https://ohocio-dl3.decisionlens.com>
- Email Strategy and Investment Team if you have problems:  
[DAS.State.ITPlanning.Manager@das.ohio.gov](mailto:DAS.State.ITPlanning.Manager@das.ohio.gov)

# Add New Initiative

- Access the Alternatives screen in your Portfolio: after the Agency POC logs in, navigate to the Alternatives screen.



Decision Lens Training Portfolio

< HOME  Alternatives

[Add Alternative](#) [Manage Submissions](#)

ORDER	NAME	DESCRIPTION	AGENCY
1	AD cleanup; OAKS / AD synch...	Clean up existing Activ...	ABC
2	AWARE Training Environment	Upgrade AWARE Trai...	ABC
3	AWARE VR, IL, PCA Data Purge	Purge oldest year of ...	ABC
4	BEAMS Phase 2 Enhancements	BE has requested a n...	ABC
5	Data Warehouse - Business In...	Establish a normalize...	ABC
6	Conversion of Excel Planning ...	This is the effort to co...	ABC
7	Test project		ABC

Access the Alternatives screen

# Add New Initiative

- From within the Alternatives screen, select “Add Alternative” from the drop-down. This will open a new, blank Alternative page.

Decision Lens Training Portfolio

Alternatives

Add Alternative Manage Submissions

ORDER	NAME	AGENCY
1	AD cleanup; OAKS / AD synchron...	Clean up existing Activ...
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7	Test project	

Add Alternative

NAME  
The name of the Agency Initiative.

DESCRIPTION  
A brief description of the initiative that includes the following:  
o-Type of technology project  
o-Purpose of the project  
o-Outcomes/Benefits.

Create Another Cancel Save

# Add New Initiative

- Enter Project Data: Populate all of the data fields. Click Save when you are done. The project will be added to the Portfolio and ready to rate during the ratings period.

**Add Alternative**

**NAME**  
*The name of the Agency Initiative.*

My New Initiative

**DESCRIPTION**  
*A brief description of the initiative that includes the following:  
o-Type of technology project  
o-Purpose of the project  
o-Outcomes/Benefits.*

This initiative delivers automated support to data reconciliation.....etc

Create Another     

**Decision Lens Training Portfolio**

**Alternatives**

ORDER	NAME	DESCRIPTION
1	AD cleanup; OAKS / AD synch...	Clean up existing Activ
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5	Data Warehouse - Business In...	Establish a normaliz.
6	Conversion of Excel Planning ...	This is the effort to co
7	Test project	
8	My New Initiative	This initiative delivers

Click "Save" to add new initiative

# Update Existing Initiative

- If you are updating data for an existing project, select the Edit (pencil) icon to the right of the project name. This will open up a sidecar editor. Updates will automatically save to the project and the sidecar will close when you close or click off the sidecar.

The screenshot displays the 'Decision Lens Training Portfolio' interface. On the left is a navigation sidebar with categories like 'PORTFOLIO OVERVIEW', 'SITE MAP', 'Define', 'Collect', 'Visualize', and 'Optimize'. The main area shows a table of 'Alternatives' with columns for 'ORDER', 'NAME', 'DESCRIPTION', and 'AGENCY'. The fourth row, 'BEAMS Phase 2 Enhancements', is highlighted in blue. A yellow callout bubble points to a pencil icon next to the project name, with the text 'Click the "Edit" icon to update project data'. To the right, a sidecar editor window is open for 'BEAMS Phase 2 Enhancements', showing fields for 'DESCRIPTION', 'AGENCY', 'OU1', and 'OU2'. A blue arrow points from the sidecar editor back to the table, and another blue arrow points from the table to the sidecar editor.

ORDER	NAME	DESCRIPTION	AGENCY
1	AD cleanup; OAKS / AD synch...	Clean up existing Activ...	ABC
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7	Test project		
8	My New Initiative		

# **Thank You from The Strategy and Investment Management Team**

# Appendix

# Strategy and Investment Management (SIM)

## Enterprise Strategic Alignment Process

### Ongoing

Agency strategic initiatives intake through Enterprise Planning Portfolio

SIM team performs initial review and seeks agency input to obtain clarifications

Map initiatives to Strategic Priorities (e.g. AI, process automation, mobile, security, cloud, etc.)

Perform analysis and document recommendations collaborating with Architecture team(s)

**Input:** Enterprise Planning Portfolio, RFPs, RTP's, R&P Requests

**Output:** Planning & Architecture analysis

### Quarterly

Conduct Joint Analysis with Service Delivery Teams and identify opportunities for:

- Shared Services
- Agency collaboration
- Technology Standardization
- Volume Purchases

Bi-directional Communication between Agencies and Service Delivery Teams

- Agency initiatives forecast to incorporate into Service Roadmaps
- New OIT initiatives in flight/roadmap to help agency planning efforts

**Communication Plan:** Portfolio Analysis Reports for Service Owners and Agencies

**Output:**

1. Updated Analysis Reports / Supporting Documentation
2. Opportunities & Analysis Recommendations

### Quarterly

#### State Leadership

SIM team will provide Collaboration Opportunity Reports & Recommendations to State CIO & Senior Leadership

#### Publish Results

Publish Collaboration Opportunity Reports to Agencies through Lines of Business and other established forums

**Input:** Opportunity Analysis & Recommendations  
**Communication Plan:** Review Collaboration Reports with State CIO & Tech Board; Upon approval, socialize in LOB and Agency feedback loop meetings.

**Output:** Identified Opportunities; Convey opportunities to Enterprise Architecture team to form Customer Centric working groups

# Strategy and Investment Management (SIM)

## Enterprise Planning Portfolio (EPP) Decision Making Framework

	Executive, Legislative or Federal Mandate	Agency Impact / Constituent Facing	Financial / Investment Value	Enterprise Service	Multi-Agency, Multi-Participant	IT Strategic Priority
Initiative Attributes	<p>Project/Initiative prioritized or sponsored by (any of):</p> <ul style="list-style-type: none"> <li>The Office of the Governor                             <ul style="list-style-type: none"> <li>Executive Orders</li> </ul> </li> <li>Innovate Ohio</li> <li>The Director of DAS</li> <li>The Director of OBM</li> <li>Legislation</li> </ul> <p>as a State strategic priority.</p>	<p>Initiative directly impacts public including (any one of):</p> <ul style="list-style-type: none"> <li>High Risk / Vulnerable Populations</li> <li>Public Health, Safety or Security</li> <li>Revenue Collection or Expense / Assistance Disbursement</li> <li>Enhances / Re-engineers a mission critical process or application that serves citizens, businesses or workforce</li> </ul>	<p>Initiative meets any of the following:</p> <ul style="list-style-type: none"> <li>Estimated total spend over lifespan of project is in excess of \$5M</li> <li>Contracted total spend over lifespan of project is in excess of \$5M</li> <li>Actual total spend over lifespan of project, inclusive of all contracted amendments or change orders is in excess of \$5M</li> </ul> <p>Total Spend is defined as all hardware, software, professional services and staff augmentation as to realize the project (e.g., "total cost").</p>	<p>Initiative is consuming an enterprise offering or service which is available to all Ohio Agencies, boards and commissions including (any of):</p> <ul style="list-style-type: none"> <li>Innovate Ohio Platform                             <ul style="list-style-type: none"> <li>Digital Customer Experience (Web Content /Hosting, Fraud Analysis)</li> <li>Identity Management</li> <li>Data Analytics</li> </ul> </li> <li>Shared Services</li> <li>State Wide Applications</li> <li>OAKS Functional Footprint</li> <li>Enterprise Service Catalog</li> </ul>	<p>Initiative effects or impacts other:</p> <ul style="list-style-type: none"> <li>Agencies</li> <li>Boards</li> <li>City</li> <li>Commissions</li> <li>County</li> <li>Federal</li> </ul> <p>or requires the active involvement and participation of any of these entities to be successful.</p>	<p>Initiative includes any State Strategic IT Priority as established by the State CIO or IT Tech Board, currently (FY19-21):</p> <ul style="list-style-type: none"> <li>Artificial Intelligence (Machine Learning, RPA, Facial/Speech Recognition, Intelligent Automation, etc.)</li> <li>Cloud Platform Development (IaaS, PaaS, SaaS, etc.)</li> <li>DevOps/SecDevOps</li> <li>Mobile</li> <li>Paperless Government</li> <li>Process Automation</li> <li>Security</li> </ul>
Action	Include in Portfolio	Include in Portfolio	Include in Portfolio	Include in Portfolio Select "Enterprise" factor	Include in Portfolio Select "Agency Collaboration" factor	Include in Portfolio
Major Project	If Planned Budget is >= 2.5 M, select "Major Project" factor	If Planned Budget is >= 2.5 M, select "Major Project" factor	If Planned Budget is >=5M, select "Major Project" factor	If Planned Budget is >= 2.5 M, select "Major Project" factor	If Planned Budget is >= 2.5 M, select "Major Project" factor	If Planned Budget is >= 1 M, select "Major Project" factor

\*\* Guidelines to enable Agencies to determine whether an Initiative/Idea/Project belongs in the Portfolio