SIA Business Process
Enterprise Planning Portfolio (EPP) Analysis

The frequency of process activities listed is **Quarterly**

Preconditions:

- Access to Decision Lens https://ohocio-dlx.decisionlens.com
- Access to Enterprise Portfolio Analysis SharePoint https://ohiodas.sharepoint.com/sites/DSAIM/
- Access to Tableau
  - Test: https://analytics.test.das.ohio.gov
  - Production: https://analytics.das.ohio.gov

Process Activity — Agency Fundamentals

Step 1:

I. Become familiar with Agencies
II. Review Agency mission, goals, objectives on the Agency websites
III. Review Agency Table of Organization
IV. Understand the Agency culture, e.g., how does the agency approach strategic planning, what is the relationship between IT and Business areas
V. Does the Agency have a "formal" business and/or strategic plan
VI. Identify the Agency's internal planning participants (i.e., investment, procurement, PPM, CIO, BRM, etc.).

Process Activity – Update Decision Lens Initiatives in Enterprise Portfolio Analysis SharePoint (EPP Analysis SP) - Bulk Load

Step 1:

I. Generate Activity Log Report from Decision Lens
   a) Log in to Decision Lens
   b) Choose the Portfolio (Agency) to review
   c) Review the Activity Log details for any updates or additions.
   d) If updates or additions are present, download the Activity Log to excel
   e) Delete all activities which are currently within EPP Analysis SP
II. Generate Alternatives Report from Decision Lens
   a) Choose the Portfolio (Agency) to review
   b) Choose Alternatives to view all Agency initiatives
   c) Download details to Excel utilizing the Generate Report button in the top right-hand corner
   d) Delete all Agency Initiatives which have already been entered in the EPP Analysis SP by comparing the data with the additions visible in the Activity Log download generated in **Step 1.I.**

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III. Open the Decision Lens to SharePoint template https://ohiodas.sharepoint.com/:x:/r/sites/DSAIM/Business%20Processes/Decision%20Lens%20to%20SharePoint%20template.xls and copy and paste the new initiatives from the Decision Lens report
   a) Remove all previous Decision Lens data from the template except for the column headings.
   b) Copy and paste the new Agency Initiative data from the Decision Lens report to the corresponding columns in the Decision Lens to SharePoint template.
   c) Review the updated initiative data in the Decision Lens to SharePoint template to ensure accuracy and correct column heading alignment.

IV. Transfer the new Agency Initiatives in the Decision Lens to SharePoint template to EPP Analysis SP
   a) Open SharePoint and choose Quick Edit
   b) Scroll to the very end of the initial page of records.
   c) In the Decision Lens to SharePoint template, highlight and copy rows of data which contain the new Agency Initiatives
   d) Paste this in the EPP Analysis SP site by clicking in the empty row at the bottom of the page and paste (ctrl V).
   e) Review new data in EPP Analysis SP for accuracy and correct column heading alignment.
   f) Add the required field details as needed (i.e., Line of Business, Budget, Dates, etc.)
   g) Exit Quick Edit to Save

Alternatively, the data can be transferred manually from Decision Lens to EPP SharePoint

Process Activity – Review Agency initiatives in EPP Analysis SharePoint

Step 1:

I. Log into EPP Analysis SharePoint
II. Filter on the Agency to review
III. Choose an individual Investment Name to populate a specific initiative and perform updates
IV. Review Investment Name and Description for details
   a) Update the Technology Advisory Group (TAG) – Align the technology to be utilized for the initiative with the appropriate TAG

      NOTE: General Salesforce initiatives do not align with any TAG. If use cases align with a TAG, then the initiative should reflect that for the TAG.

   b) Validate major project criteria with Agency based upon Major Project Governance Policy IT-16.
   c) Update the Enterprise/Agency field to reflect:
      1) Agency – Investment is specific to a particular agency
      2) Agency Collaboration – Collaboration across multiple agencies is possible

3) Enterprise – Specific to OIT Shared Services

d) Update the Clients/Customers field to reflect who is impacted by the initiative:
   1) Citizen
   2) Business
   3) Work Force
e) Update the Business Capabilities field with core business capabilities that are implemented as part of this project.
f) Strategic Priorities – What State priorities does this effort align with (if any)?

   NOTE: This section is utilized to pull data when generating Tableau reports
g) Opportunity Type - Agency Specific? Or does it align with an opportunity to consolidate to the center?
h) DAS Shared Services – Determine if OIT offers the service needed and select the offering that would be utilized with this initiative.
   a. Only utilize this field when the initiative states it WILL utilize an OIT Service Offering(s) or it has been validated with the Agency.

   NOTE: This section is utilized to pull data when generating Tableau reports
i) Application Re-platforming – Does this replace an existing application and if so which one?
j) Technology Classification (tags) - Using the tags drop down field, indicate the technology classification of the investment.

   Note: This field is also populated by POCs in DLX
k) Primary Technology – Choose the primary technologies for the initiative (multiple choices can be selected)

   Note: This field is also populated by POCs in DLX
l) Secondary Technology - Choose the secondary technologies for the initiative (multiple choices can be selected)

   Note: This field is also populated by POCs in DLX
m) OIT Joint Analysis comments – Update with SIA analysis comments and thoughts.
   1) Include further research criteria, follow-up, notifications, thoughts, and potential issues
   2) Include OIT teams potentially involved if not noted in previous fields: IOP OH-ID, IOP Analytics, IOP Web, Server, Cloud, OISP, OBG, WaaS, Mainframe, etc., to ensure they are aware of future projects.
   3) For VoIP, Contact center or Call center, IVR, etc., include UNS (Unified Communications).
   4) For Learning Management include OAKS
   5) For old technology that is being upgraded/replaced include Divest
   6) For initiatives which might involve the DAS PMO office include EPMO
   7) Additionally, refer to OIT SME reviewer list to identify other services during the analysis process

      NOTE: This section is utilized to pull data when generating Tableau reports so duplicate information from other fields may be necessary.

n) Review Decision Lens entry date to populate 'Reported (FY/QT)' field

V. If any updates from the Agency are incomplete or missing, work directly with the Agency contact to obtain Decision Lens updates or additional details as necessary.

Process Activity: Run Tableau Reports (EPP SharePoint Data)

Step 1: Within Tableau there are 3 SIA Analyst reports available.

I. Log in to Tableau Test
II. Choose SIM Enterprise Strategic Planning
III. Click on Enterprise_Analysis_Report to populate current reports
IV. Choose 'Home' from the Views available
   - ***Enterprise Portfolio Analysis Report option***
     a) Utilize the filters on the right-hand side of the page for specific details to be incorporated into report (i.e., Agency, FY, DAS Shared Service, TAG, Comments, etc.).
     b) Catalog opportunities for possible multi-agency collaboration
     c) Download a copy of the report once finalized with input criteria
     d) Print as needed
   - ***SIM Analysis Report option***
     a) Utilize the filters on the right-hand side of the page for specific details to be incorporated into a report (i.e., Agency, FY, Strategic Priority, Comments, etc.).
     b) Utilize the 'Report Subtitle' option below the report filters to add a Title to the new report
     c) Download a copy of the report once finalized with input criteria
     d) Print as needed

Process Activity – Joint Analysis Review

I. Catalog opportunities based upon SME Ownership
II. Conduct joint analysis review sessions with OIT SMEs to socialize Agency initiatives and collaborate on any potential opportunities.
III. Make the appropriate follow-ups with Agencies and update EPP Analysis SP as needed

Process Activity – Socialize with Senior Leadership and Agencies

I. Distribute reports to Senior Leadership and Agencies via feedback loop
II. Mediate any discrepancies between agency/service owner
III. Socialize DAS Portfolio with Agencies via established channels
IV. Work with Senior Leadership to obtain approval for collaboration/consolidation opportunities

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Version Revisions

Date Version	Description	Author	Version
February 19, 2019	Document Creation	Delania Hopper	v1
June 11, 2020	Document process updates and formatting	Delania Hopper	v2
February 14, 2022	Document process updates and formatting	Delania Hopper	v3