



State of Indiana

Call for IT Projects and Procurements Portal User Reference Guide

Section 1 Getting Started

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Getting Started

1.1 Overview

The State of Indiana's Call for Projects and Procurement (CFPP) Portal provides a repository and a consistent process for planning and reporting IT projects and procurements across state agencies. The CFPP portal enables IOT and IDOA to gain visibility into agency IT project and procurement plans substantially earlier in the procurement lifecycle to strengthen the state's ability to effectively predict demand and manage its information technology investment and to ensure that existing contract vehicles or procurement strategies are collectively examined and considered early in the procurement planning process.

The CFPP portal enforces a uniform structure for collecting, analyzing and reporting on planned IT activities – projects and ongoing operations – that will facilitate

- forecasting demand on IT services and resources,
- leveraging shared services opportunities,
- assessing a PSC level of engagement, based on project risk, complexity, or priority, and
- determining whether additional information is required through an advanced review of a planned project.

The planning cycle within the CFPP produces an Operating Plan, Project Profile, and Procurement Profile, as applicable. Each of the successive points within the cycle makes use of the input and planning produced earlier by pre-populating shared data fields. For example, the initial project description provided in an Operating Plan Line Item is the basis for creating and pre-populating a Project Profile. The requirements outlined in the Project Profile are the basis for creating and pre-populating a scope of work included in the Procurement Profile. In this way, the system enables the state to establish and enforce minimum quality standards for agency project and procurement deliverables.

The CFPP Portal Reference Guide (Guide) describes the processes for creating, submitting and reviewing “deliverables” produced within the planning cycle. A CFPP deliverable includes an Operating Plan, Operating Plan Line Item, Project Profile, and Procurement Profile. The Guide is organized by section around these deliverables, in the sequence in which they are produced. Features of the portal are illustrated in each section. The Guide is intended to provide a resource for a user to navigate the system to create and submit a CFPP deliverable and to guide the user throughout the CFPP planning and review lifecycle.

1.2 Organization of the Guide

The Guide includes the following sections:

- Section 1 | Getting Started – provides an overview of the CFPP planning and reporting process
- Section 2 | Overview of the CFPP Portal – describes navigation, user profiles and general features of the CFPP portal
- Section 3 | Create and Manage a CFPP Operating Plan – describes the steps to create, update, manage, and submit an Operating Plan
- Section 4 | Create and Manage a CFPP Operating Plan Line Item – describes the steps to create, update, manage, and submit an Operating Plan Line Item
- Section 5 | Create and Manage a CFPP Project Profile – describes the steps to create, update, manage, and submit a Project Profile
- Section 6 | Create and Manage a CFPP Procurement Profile – describes the steps to create, update, manage, and submit a Procurement Profile
- Section 7 | Review of a CFPP Plan or Profile – describes the steps to conduct a review, including collaboration with the IOT Business Reviewer and IDOA Procurement Reviewer