



State of Indiana

Call for IT Projects and Procurements Portal User Reference Guide

Section 2 Overview of the CFPP Portal

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Overview of the CFPP Portal

2.1 CFPP Portal Structure

All agency Operating Plans, Operating Plan Line Items, Project Profiles, and Procurement Profiles can be accessed from the group of tabs in the ribbon present on all pages.

The screenshots illustrate the portal's structure and navigation. The top navigation bar includes a search bar, a user profile (Roberta Smith), and a ribbon of tabs: My Agency, Contacts, Operating Plans, Operating Plan Line Items, Project Profiles, Procurement Profiles, and Reports. The left sidebar contains a 'Show Feed' button and a 'Back to List: Agencies' link. The main content area displays the details of the selected item.

Operating Plan Detail (99999-18)

Operating Plan Line Item Detail (99999-18-2)

Project Profile Detail (99999-18-2-1)

Project Profile Detail Data:

Field	Value
Project Profile ID	99999-18-2-1
Operating Plan Line Item	99999-18-2
Agency	CFPP Test Agency
Owner	Stella Luna
Status	Review
Status Explanation	
Project Profile Submitted Date	6/24/2017
Request an IOT Project Manager?	Yes
Estimated Duration	8 months

General Project Information:

Field	Value
Project Name	Immunization Information System (Registry) Modernization Needs Assessment
Main Contact	Stella Luna

2.2 CFPP Page Layout

The CFPP portal allows a user to drill down from the home page to create, enter, access and update information in an Operating Plan. From an Operating Plan page a user can create, enter, access and update information in an Operating Plan Line Item, Project Profile, and Procurement Profile.

Home Page: The top navigation bar includes links for My Agency, Contacts, Operating Plans, Operating Plan Line Items, Project Profiles, Procurement Profiles, and Reports. The Operating Plans tab is highlighted. A search bar and user profile (Roberta Smith) are in the top right.

Operating Plans Page: This page shows a list of recent operating plans. The first entry is highlighted with the ID 99999-18. A note indicates: "One Operating Plan each fiscal year".

Operating Plan Detail Page: This page provides information for the selected operating plan (99999-18). It includes:

- Agency Information:** Owner (Tom Morrow), Operating Plan ID (99999-18), Agency (CFPP Test Agency).
- Submission Information:** Status (Submitted).
- Operating Plan Line Items:** A table listing activities associated with the plan.

Action	ID	Agency Name	Activity Type	Activity Name
Edit Del	99999-18-1	CFPP Test Agency	Ongoing Operations	Network Expansion
Edit Del	99999-18-2	CFPP Test Agency	Project	Immunization Information

Operating Plan Line Item Detail Page: This page provides detailed information for a specific line item (99999-18-1). It includes:

- Operating Plan Line Item Detail:** ID (99999-18-1), Owner (Tom Morrow), Operating Plan (99999-18), Agency (CFPP Test Agency).
- Operating Plan Information:** Activity Type (Ongoing Operations), Activity Name (Network Expansion), Business Area Support (Agency), IT Project/Ongoing Operations Support (Maintain or enhance existing network infrastructure).
- Contact Information:** Main Contact (Stella Luna), Main Contact Email Address (mousseseu@civilianinitatives.com), Main Contact Phone Number.
- Budget Information:** Is the Activity Budgeted? (Yes), Source of Funds (General Revenue).

Annotations:

- "Each tab accesses a web page to enter data" points to the Operating Plans tab in the top navigation bar.
- "Operating Plan Detail includes agency information, status information and a list of the activities - Ongoing Operations and Projects that are associated with the Operating Plan" points to the Operating Plan Detail page.
- "Operating Plan Line Item includes an ongoing operations or project (activity) that is planned to exceed \$75k in acquisition, development, implementation, and/or maintenance costs" points to the Operating Plan Line Item Detail page.
- "Agency Code-Fiscal Year (YY)-Number (in sequence)" points to the ID field in the Operating Plan Line Items table.

2.3 CFPP User Profiles

There are five user profiles defined in the CFPP Portal. These include the Agency Lead, Agency User, IOT Project Success Center, IOT Business Reviewer, and IDOA Procurement Reviewer.

State Agency Profiles

CFPP Deliverable Assign, Create, Update, Submit

- Agency Lead – Can assign ownership, create and update records, submit an operating plan, operating plan line items, project profiles, procurement profiles
- Agency User – Can create and update records, submit operating plan line items, project profiles, procurement profiles, for which the user is the designated owner

A default convention is to establish one Agency Lead per agency. The Agency Lead can create a new contact and enable that contact as a user and assign ownership rights, as applicable.

Reviewer Profiles

Operating Plan and Project Profile Review

- IOT Project Success Center – Can update fields in all of the review sections, including the Status and Status Explanation fields
- IOT Business Reviewer – Can update specific fields contained in the IOT Business Review section
- IDOA Procurement Reviewer – Can update specific records contained in the IDOA Review section

Procurement Profile Review

- IDOA Procurement Reviewer – Can update fields in all of the review sections, including the Status and Status Explanation fields
- IOT Business Reviewer, including IOT Project Success Center – Can update specific fields contained in the IOT Business Review section

The table on the following page depicts the access privileges assigned within these profiles.

IOT/IDOA Profiles	Profile	
	Agency Lead	Agency User
Assign Owner	X	
Create Operating Plan	X	
Update Operating Plan	X	X
Submit Operating Plan	X	Only if assigned as Owner
Create Operating Plan Line Item	X	X
Update Operating Plan Line Item	X	X
Submit Operating Plan Line Item	X	Only if assigned as Owner
Create Project Profile	X	X
Update Project Profile	X	X
Submit Project Profile	X	Only if assigned as Owner
Create Procurement Profile	X	X
Update Procurement Profile	X	X
Submit Procurement Profile	X	Only if assigned as Owner

IOT/IDOA Profiles	Profile		
	PSC Reviewer	IOT Reviewer	IDOA Reviewer
Change review status of Operating Plan Line Item	X		
Enter/update status explanation for Operating Plan Line Item	X		
Enter/update Operating Plan Line Item review comments in IOT Business Review section	X	X	

Action	PSC Reviewer	IOT Reviewer	IDOA Reviewer
Enter/update Operating Plan Line Item review comments in IDOA Review section	X		X
Enter/update Operating Plan Line Item review in comments IOT/IDOA Review Information section	X		
Change review status of Project Profile	X		
Enter/update status explanation for Project Profile	X		
Enter/update Project Profile review comments in IOT Business Review section	X	X	
Enter/update Project Profile review comments in IDOA Review section	X		X
Enter/update Project Profile review comments in IOT/IDOA Review Information section	X		
Change review status of Procurement Profile Line Item	X		X
Enter/update status explanation for Procurement Profile	X		X
Enter/update Procurement Profile review comments in IOT Business Review section	X	X	
Enter/update Procurement Profile review comments in IDOA Review section	X		X
Enter/update Procurement Profile review comments in IOT/IDOA Review Information section	X		X