



State of Indiana

Call for IT Projects and Procurements Portal User Reference Guide

Section 4 Create and Manage a CFPP Operating Plan Line Item

**October 10, 2017
Version 1.0**

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Create and Manage a CFPP Operating Plan Line Item

4.1 Process Overview

An Operating Plan submitted for a particular fiscal year must include all the Operating Plan Line Items that are estimated to exceed \$75,000 in acquisition, development, implementation, and/or maintenance costs. The Operating Plan Line Item provides the detail information for two types of activities that comprise an Operating Plan: Ongoing Operations and Projects.

Note that while an Operating Plan must include all the Operating Plan Line Items that meet the reporting criteria, each Operating Plan Line Item is reviewed and evaluated independently in the CFPP.

4.2 Reporting Requirements

For the purpose of reporting IT project and procurement planning information, the Operating Plan includes the following elements, or activity types:

- **Ongoing Operations** – this activity type supports maintenance and operations of an agency’s information technology environment. The procurements and resources included in this category are limited to providing continuation of services necessary to maintain current levels of service. Activities vary based on the organizational structure and size of the agency. For example, technical support may be administered through a help desk that is dedicated to one program within an agency. In this circumstance, an agency should create an ongoing operations activity, title Program X Help Desk.
- **Project** – this activity type encompasses development, deployment, or delivery of new functionality through systems or application development, procurement, or other IT solutions and service delivery methods. A project is distinct from ongoing operations in that it is unique and not a routine operation. A project is temporary, has a defined beginning and end time, and is defined by the scope, resources, and schedule to accomplish a singular goal.

4.3 Operating Plan Review Process

After initial submission of the Operating Plan, each Operating Plan Line Item is reviewed, evaluated, and acted on (through approval, additional information request, etc.) by IOT, IDOA, and the agency. If additional information is required to conduct the review, the Operating Plan Line Item must be resubmitted, and the 30-day review period is reset for that line item at the time that it is resubmitted.

Review of each Operating Plan Line Item occurs within a 30-day period of the Operating Plan's submission. If an agency has not received notification from IOT within 30 days after submitting its Operating Plan, the agency may initiate project activities, including procurement actions, subject to applicable policies and procedures for the particular Operating Plan Line Item. If this circumstance occurs, the agency will receive notification from the CFPP portal that the Operating Plan Line Item is approved, and that the review window is closed.

If approved, the Operating Plan Line Item is managed as an independent activity. While associated with the particular Operating Plan, the line item is defined by the parameters (scope, schedule, budget) of the activity that it represents. If additional CFPP deliverables are required for that line item, the submission of those items can occur at any time in the fiscal year as required by the activity.

4.4 CFPP Operating Plan Line Item Features

This section provides screen shots of the CFPP Operating Plan Line Item activities and describes the steps to create, manage, and update Operating Plan Line Items to include in the submission of an Operating Plan.

4.4.1 Create a New Operating Plan Line Item

IN.gov

Sandbox: UAT

Search... Search

Roberta Smith

My Agency Contacts Operating Plans **Operating Plan Line Items** Project Profiles Project Profiles

Operating Plan Line Items Home

View: 1. Draft Go!

Note 1

*All Operating Plan Line Items

1. Draft
2. Review
3. Returned to Agency for More Info
4. Deferred - Enterprise or Agency Sol.
5. Denied
6. Closed - No further action needed
7. Approved - IT Project Profile Req'd
8. Approved - No Add'l Review Required
9. Approved - Review Window Closed

Create New Operating Plan Line Item

Recently Viewed

ID	Agency	Activity Name	Activity Type	Status	Line Item Submitted Date	Review Days Remaining
99999-18-1	CFPP Test Agency	Network Expansion	Ongoing Operations	Draft		

Steps

1. To add a new line item, select Create New Operating Plan Line Item.
2. To modify an existing line item, select the Operating Plan Line Item ID.

Notes

1. The View filter enables you to display all operating plan line item by their status. For example, select 1. Draft for all operating plan line items in draft status and click on the Go! button.

4.4.2 Select Ongoing Operations Activity Type

Note 1

Select an Activity type for the new Operating plan line item.

Select Operating Plan Line Item Activity Type

Activity Type of new record: ☒ Project ☐ Ongoing Operations

2 → Continue Cancel

Available Operating Plan Line Item Activity Types

Activity Type	Description
Ongoing Operations	Procurements that Support Maintenance, Including Growth and Expansion of Existing Technology Suite
Project	New Development, Procurement, or Solutions Delivery Projects

Note 2

Steps

1. Select from the drop-down list the type of activity for this Operating Plan Line Item (Project or Ongoing Operations).
2. Click on the Continue button.

Notes

1. The **Project** activity type includes projects that deliver new functionality through systems or application development, procurement, or other IT solutions and services delivery method.
2. The **Ongoing Operations** activity type includes all other products and services that are not linked to a specific project. This activity reflects operational activities that deliver existing capability.
3. Refer to Section 2.3 of the Call for IT Projects and Procurements Reference Guide for more information on content requirements of both activity types.

4.4.3 Enter Ongoing Operations Activity Information



Search...
Search

Sandbox: UAT

Roberta Smith

My Agency | Contacts | Operating Plans | **Operating Plan Line Items** | Project Profiles | Procurement Profiles | Reports

Operating Plan Line Item Edit

Save | Save & New | Cancel

4

Operating Plan Line Item Edit

Autogenerated ID

Operating Plan

Note 1

Information

1

Note 2

Activity Name

Network Expansion

Business Area Support

Agency

Identify the agency business unit or area for which this project or ongoing operations activity is planned. Indicate "Agency" if agency-wide.

IT Project/Ongoing Operations Support

Available

Maintain or enhance existing applications and systems
Deploy new applications or systems
Expand network infrastructure

Chosen

Maintain or enhance existing network infrastructure

Note 3

Note 4

Describe

Contact Information

2

Main Contact

Stella Luna

Budget Information

3

Is the Activity Budgeted?

Yes

Source of Funds

General Revenue

Note 3

Note 4

Describe

--None--
General Revenue
Appropriated Receipts
Federal Funds
Grant - Federal
Grant - State
Grant - Other
Other

Steps

1. Enter general information, including the name of the Ongoing Operations activity, the business unit supported by the activity and the technology resources that are planned to support the activity.
2. Enter the agency contract for the activity.
3. Enter budget information for the activity.
4. Click on the Save button to save the record. Once the activity type is saved, you can enter the resources (hardware, software, and services) that support the activity.

Notes

1. Unique auto-numbering feature for Operating Plan Line Item is associated with Operating Plan ID.
2. Field label descriptions can be displayed when you hover over the ? icon adjacent to the field label.
3. Many of the Operating Plan Line Item fields have multi-selection or drop-down list box to facilitate data entry.
4. If “Other” is selected from a multi-selection or drop-down list box, you must describe the item in the text box provided.

4.4.4 Edit Ongoing Operations Activity or Add Activity Resource

 Sandbox: UAT Search Roberta Smith

[My Agency](#) [Contacts](#) [Operating Plans](#) **[Operating Plan Line Items](#)** [Project Profiles](#) [Procurement Profiles](#) [Reports](#)

 **Operating Plan Line Item** Printable View
99999-18-1

[Show Feed](#)

✓ Operating Plan Line Item has been saved.
[Back to List: Agencies](#)

Activity Resources (0)

Operating Plan Line Item Detail 1  [Edit](#) [Delete](#) [Change Activity Type](#) [Submit](#)

ID	99999-18-1	Status	Draft
Owner	 Roberta Smith	Status Explanation	
Operating Plan	99999-18	Line Item Submitted Date	
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

IOT/DOA Review Information

Is an Advanced Review Required? ☐

Additional comments 

IOT/DOA Preferred Method of Procurement 

Additional comments 

Is Reporting or Monitoring Required? ☐

Additional comments 

Note 2

System Information

Created By [Roberta Smith](#), 6/1/2017 2:29 PM

Last Modified By [Roberta Smith](#), 6/1/2017 2:29 PM

[Edit](#) [Delete](#) [Change Activity Type](#) [Submit](#)



Activity Resources

[New Activity Resource](#)

2

No records to display

Steps

1. Select Edit to revise any of the draft information entered for the activity.
2. Select New Activity Resource to add information on planned IT procurements (hardware, software, and services) or IOT services that are required to support the activity.

Notes

1. Status is Draft until all activity types are entered into an operating plan for a particular fiscal year and the operating plan is submitted to IOT for review.
2. The IOT/IDOA Review Information block is reserved for IOT and IDOA reviewers. Information related to an operating plan line item is communicated to the agency, including whether an advanced review (project profile is required [for projects], review comments, preferred method of procurement, and whether additional reporting or monitoring is required.

4.4.5 Enter Ongoing Operations Activity Resource Information

Sandbox: UAT

Roberta Smith

▼

My Agency

Contacts

Operating Plans

Operating Plan Line Items

Project Profiles

Procurement Profiles

Reports

Activity Resource Edit

New Activity Resource

Activity Resource Edit

Save

Save & New

Cancel

Information

Operating Plan Line Item

99999-18-1

▼

--None--

Application Systems

Database Systems

Hardware

Software

Telecommunications

Web

Speciality Products

Services

Other

Resource Information

Resource Category

--None--

Resource Sub-Category

--None--

Resource Description

▼

--None--

LAN/WAN Infrastructure

Mainframe/Server Infrastructure

PC Purchases, Peripherals

Public Safety Radios, Systems

Storage Area Network Devices

All Other Hardware

Estimate of Initial and Recurring Costs

FY 2017 Initial Cost

▼

FY 2018 Initial Cost

▼

FY 2019 Initial Cost

▼

FY 2020 Initial Cost

▼

FY 2021 Initial Cost

▼

Has Agency's HPA Reviewed Procurement?

--None--

If No, When is HPA Review Planned?

▼

FY 2017 Recurring Cost

▼

FY 2018 Recurring Cost

▼

FY 2019 Recurring Cost

▼

FY 2020 Recurring Cost

▼

FY 2021 Recurring Cost

▼

Project Resource Justification

Justification

▼

Save

Save & New

Cancel

Note 1

Procurement Method

--None--

Specify Contract No. If Existing

Explain Need for Special Procurement

Describe

--None--

IOT Services

Existing QPA/Contract

Existing Agency Contract

Request for Proposal

Procurement Card

Special Procurement

Other (Describe)

= Required Information

Steps

1. Enter resource information from drop down lists provided, including the resource category, sub-category, and a description of the resource.
Enter the planned procurement method and provide further information if Existing QPA/Contract, Special Procurement, or Other is selected.
2. Enter an estimate of initial and recurring cost for each fiscal year. Note that annually recurring costs associated with IOT services or other operating expenses that are renewed annually should be reflected as a recurring cost.
Indicate whether your agency's head procurement agent has reviewed the planned resource.
3. Enter a justification for all resources over \$25,000.
4. Click on the Save button to save the record or Save & New button to save and add a new record.

Notes

1. The Resource Category and Resource Sub-Category fields are linked and are grouped in a manner that is generally related to service areas and product types outlined in the IOT Service Catalog.

4.4.6 Add New or Edit Existing Activity Resource

INGOV Search... Sandbox: UAT

rsmith@cfpp.in.gov

My Agency | Contacts | Operating Plans | **Operating Plan Line Items** | Project Profiles | Procurement Profiles | Reports

Operating Plan Line Item 99999-18-1 Printable View

[Show Feed](#)

[Back to List: Agencies](#)

Activity Resources Activity Resources [1]

Action	Project Resource ID	Resource Category	Resource Sub-Category
Edit Del	PR-355	Hardware	LAN/WAN Infrastructure

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

Describe

Contact Information

Main Contact: Stella Luna

Main Contact Email Address: sluna@cfpp.in.gov

Main Contact Phone Number

Budget Information

Is the Activity Budgeted?: Yes

Source of Funds: General Revenue

Describe

Summary of Activity Resource Cost Estimates

FY 17 Initial and Recurring Cost	\$20,000.00
FY 18 Initial and Recurring Cost	\$20,000.00
FY 19 Initial and Recurring Cost	\$20,000.00
FY 20 Initial and Recurring Cost	\$20,000.00
FY 21 Initial and Recurring Cost	\$20,000.00
Activity Resource Cost Summary	\$100,000.00

My Agency | Contacts | Operating Plans | Operating Plan Line Items | Project Profiles | Procurement Profiles | Reports

Activity Resource **PR-355** Printable View

✓ Activity Resource has been saved.

[Back to List: Agencies](#)

Notes & Attachments (0)

Activity Resource Detail

Project Resource ID: PR-355

Operating Plan Line Item: 99999-18-1

Resource Information

Resource Category: Hardware	Procurement Method: IOT Services
Resource Sub-Category: LAN/WAN Infrastructure	Specify Contract No. If Existing
Resource Description: Increased network utilization	Explain Need for Special Procurement
	Describe

Estimate of Initial and Recurring Costs

FY 2017 Initial Cost	FY 2017 Recurring Cost
FY 2018 Initial Cost	FY 2018 Recurring Cost
FY 2019 Initial Cost	FY 2019 Recurring Cost
FY 2020 Initial Cost	FY 2020 Recurring Cost
FY 2021 Initial Cost	FY 2021 Recurring Cost

Has Agency's HPA Reviewed Procurement Plan: Yes

If No, When is HPA Review Planned?

Steps

1. Click on the New Activity Resource button to add a new activity resource line item.
2. Click on the Edit or Delete button to edit or delete the activity resource line item.

Notes

1. The operating plan line item is displayed on all records associated with that line item.
2. A list of activity resources can be accessed from the top or bottom of the page.
3. A calculation of the total initial and recurring cost of the activity resource is displayed by fiscal year on the Operating Plan Line Item page.

4.4.7 Create a New or Edit Existing Operating Plan Line Item

Steps

1. Select Edit, Delete or Submit to manage actions.
2. Select New Operating Plan Line Item to add a new activity. Refer to Section 4 for more information on creating and managing operating plan line items.
3. Select Edit or Del to manage operating plan line items.

Notes

1. From the Operating Plan tab you can Edit, Delete, or Submit the operating plan. Additionally, you can Edit, Delete or Add new operating plan line items.
2. Only the Agency Lead or the individual designated by the Agency Lead can submit an operating plan.

4.4.8 Select Project Activity Type and Enter Information

New Operating Plan Line Item
Select Operating Plan Line Item Activity

Select an Activity type for the new Operating plan line item.

Select Operating Plan Line Item Activity Type

Activity Type of new record: **Project**

Continue

Available Operating Plan Line Item Activity Types

Activity Type	Description
Ongoing Operations	Procurements that Support Maintenance, Including Growth and Expansion
Project	New Development, Procurement, or Solutions Delivery Projects

Note 1

Operating Plan Line Item Edit

Save Save & New Cancel

ID: Autogenerated ID
Operating Plan: 99999-18

Information

Activity Name: Immunization Information
Business Area Support: Epidemiology, Vital Statistics
Business Capabilities and Applications: Case/Client Management
Describe:
IT Project/Ongoing Operations Support: Available
Maintain or enhance existing applications and systems
Expand network infrastructure
Deploy systems integrations solutions
Describe:
Contact Information
Main Contact: Tom Morrow
Budget Information
Is the Activity Budgeted? Yes
Source of Funds: Other (Describe)
Describe: Combination federal and state

Project Information

Project Description: Migrate the existing platform for the state's immunization registry to improve data exchange capabilities, improve scalability, robustness, and comply with HL-7 interoperability standards.
Agencies/Departments Impacted: Dept of Health only
Existing Systems/Technology Environment: Agency's shot scheduler system; Exchanges information (interfaces) with CDC, emergency responders, WIC, vaccine administration systems.
Project Customer(s): Epidemiology, Vital Statistics
Planned Start Date: 8/1/2017 [6/6/2017]
Planned End Date: 3/31/2017 [6/6/2017]
Project Budget (Total Estimated Cost): \$550,000

Anticipated Planning Timeline (major milestones)

Project Profile Submitted (anticipated): 9/1/2017 [6/6/2017]
Procurement Issued (anticipated): 11/1/2017 [6/6/2017]
Contract Awarded (anticipated): 12/1/2017 [6/6/2017]

Note 2

Save Save & New Cancel

Steps

1. Select from the drop-down list the Project activity type.
2. Click on the Continue button.
3. Enter general information.
4. Enter project information.
5. Enter the anticipated dates for project milestones.
6. Click on the Save button to save the record. Once the activity type is saved, you can enter the resources (hardware, software, and services) that support the activity.

Notes

1. The general information fields in the Projects activity (Step 3) are substantially the same as in the Ongoing Operations activity.
2. These are estimated dates only. One or more of these project milestones may not be applicable to the project, but this information must be entered to facilitate IOT and IDOA planning.

4.4.9 Edit Project Activity Type or Add Activity Resource

Operating Plan Line Item
99999-18-2

[Show Feed](#)

Operating Plan Line Item has been saved.

[Back to List: Operating Plans](#)

[Project Profiles \[0\]](#) | [Activity Resources \[0\]](#)

Operating Plan Line Item Detail

1

→

Edit

Delete

Change Activity Type

Submit

ID

99999-18-2

Operating Plan

99999-18

Agency

CFPP Test Agency

Owner

Roberta Smith

Information

Activity Type

Project

Activity Name

Immunization Information System (Registry)

Business Area Support

Epidemiology, Vital Statistics

Business Capabilities and Applications

Case/Client Management

Describe

IT Project/Ongoing Operations Support

Deploy new applications or systems; Maintain

Describe

Contact Information

Main Contact

Tom Morrow

Main Contact Email Address

tmorrow@cfpp.in.gov

Main Contact Phone Number

Budget Information

Is the Activity Budgeted?

Yes

Source of Funds

Other (Describe)

Describe

Combination federal and state funds

Anticipated Planning Timeline (major milestones)

Project Profile Submitted (anticipated)

9/1/2017

Procurement Issued (anticipated)

11/1/2017

Contract Awarded (anticipated)

12/1/2017

Summary of Activity Resource Cost Estimates

FY 17 Initial and Recurring Cost

FY 18 Initial and Recurring Cost

FY 19 Initial and Recurring Cost

FY 20 Initial and Recurring Cost

FY 21 Initial and Recurring Cost

Activity Resource Cost Summary

IOT/IDOA Review Information

Is an Advanced Review Required?

☒

Additional comments

IOT/IDOA Preferred Method of Procurement

Additional comments

Is Reporting or Monitoring Required?

☐

Additional comments

System Information

Created By

Roberta Smith, 6/6/2017 12:30 PM

Edit

Delete

Change Activity Type

Submit

Project Profiles

No records to display

Activity Resources

No records to display

2

→

New Activity Resource

New Activity Resource

Save

Save & New

Cancel

Activity Resource Edit

Operating Plan Line Item

99999-18-2

Resource Information

Resource Category

Services

Resource Sub-Category

RFP/RFPs Required for Contract Project Services

Resource Description

41 remaining conduct a Needs Assessment that will deliver business requirements

Procurement Method

Existing GPA/Contract

Specify Contract No. if Existing

10911

Explain Need for Special Procurement

Describe

Estimate of Initial and Recurring Costs

FY 2017 Initial Cost

FY 2018 Initial Cost

550000

FY 2019 Initial Cost

FY 2020 Initial Cost

FY 2021 Initial Cost

FY 2017 Recurring Cost

FY 2018 Recurring Cost

FY 2019 Recurring Cost

FY 2020 Recurring Cost

FY 2021 Recurring Cost

Has Agency's HPA Reviewed Procurement?

Yes

If No, When is HPA Review Planned?

Project Resource Justification

Justification

Issue an RFO or Request for Services for a qualified vendor to conduct an assessment of the business needs and current technology environment.

Save

Save & New

Cancel

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Steps

1. Select Edit to revise any of the draft information entered for the activity.
2. Select New Activity Resource to add information on planned IT procurements (hardware, software, and services) or IOT services that are required to support the activity.

Notes

1. Operating Plan line item is saved.
2. Operating Plan line item ID is shown as sequentially numbered.
3. Summary of Activity Resource Cost Estimates fields are blank until activity resources are added to the Activity.
4. IOT/IDOA Review Information block reflects a check by Is an Advanced Review Required because Project Budget (Total Estimated Cost) exceeds \$500,000.
5. New Project Profile – A Project Profile should not be created until sufficient information is known about the project.

IMPORTANT: Not all projects require a Project Profile. IOT will make a determination regarding the need for a Project Profile as a result of the IOT/IDOA review of an agency Operating Plan. Unless an advanced review is required and specified as a result of IOT/IDOA review of a project, an agency is not required to create and submit a Project Profile.

If an advanced review is required, an agency should plan to complete and submit the Project Profile prior to initiating a procurement greater than \$75,000.

4.4.10 Enter Project Activity Resource Information

Activity Resource Edit

New Activity Resource

Activity Resource Edit

SaveSave & NewCancel

Information

= Required Information

Operating Plan Line Item

99999-18-2

Resource Information

Resource Category

Services

Resource Sub-Category

RFP/RFS Required for Contract Project Services

Resource Description

conduct a Needs Assessment that will deliver business requirements

41 remaining

Procurement Method

Existing QPA/Contract

Specify Contract No. If Existing

10911

Explain Need for Special Procurement

Describe

Estimate of Initial and Recurring Costs

FY 2017 Initial Cost

FY 2018 Initial Cost

FY 2019 Initial Cost

FY 2020 Initial Cost

FY 2021 Initial Cost

Has Agency's HPA Reviewed Procurement?

Yes

If No, When is HPA Review Planned?

FY 2017 Recurring Cost

FY 2018 Recurring Cost

FY 2019 Recurring Cost

FY 2020 Recurring Cost

FY 2021 Recurring Cost

Project Resource Justification

Justification

issue an RFO or Request for Services for a qualified vendor to conduct an assessment of the business needs and current technology environment.

SaveSave & NewCancel

4.4.11 Change Activity Type

IN.gov

Sandbox: UAT

Search...

Roberta Smith

My Agency Contacts Operating Plans **Operating Plan Line Items** Project Profiles Procurement Profiles Reports

Operating Plan Line Item 99999-18-1

Note 1

Show Feed

Back to List: Agencies

Activity Resources [1]

Operating Plan Line Item Detail

Edit Delete **Change Activity Type** Submit

ID 99999-18-1

Owner Roberta Smith

Operating Plan 99999-18

Agency CFPF Test Agency

Status Draft

Status Explanation

Line Item Submitted Date

Operating Plan Information

Activity Type Ongoing Operations

Activity Name Network Expansion

Business Area Support Agency

Note 2

My Agency Contacts Operating Plans **Operating Plan Line Items** Project Profiles Procurement Profiles Reports

New Operating Plan Line Item

Select Operating Plan Line Item Activity

Select an Activity type for the new Operating plan line item.

Select Operating Plan Line Item Activity Type

Activity Type of new record Project

Continue Cancel

Available Operating Plan Line Item Activity Types

Activity Type	Description
Ongoing Operations	Procurements that Support Maintenance, Including Growth and Expansion of Existing Technology Suite
Project	New Development, Procurement, or Solutions Delivery Projects

Steps

1. Select Change Activity Type to change the type of activity.
2. Select either Project or Ongoing Operations.
3. Select Continue.

Notes

1. From the Operating Plan Line Items tab you can Edit, Delete or Change Activity Type of the operating plan line item. Although the Submit button is displayed, the CFPP Portal will not allow a user to submit an operating plan line item if the associated operating plan is in Draft status.
2. Once created, and prior to submission, if an agency determines that the activity was incorrectly classified, it can change the activity type and retain the common data elements that are shared between the Ongoing Operations activity type and the Project activity type.

4.4.12 Edit Changed Activity Type

Operating Plan Line Item Edit

SaveSave & NewCancel

ID 99999-18-1
Operating Plan 99999-18

Note 1

Information ← 1

Activity NameNetwork Expansion

Business Area SupportAgency

Business Capabilities and Applications--None--

Describe

IT Project/Ongoing Operations Support

Available

Maintain or enhance existing applications and systems
Deploy new applications or systems
Expand network infrastructure

Chosen

Maintain or enhance existing network infrastructure

Describe

Note 2

Contact Information ← 2

Main ContactStella Luna

Budget Information ← 3

Is the Activity Budgeted?Yes

Source of FundsGeneral Revenue

Describe

Note 2

Project Information ← 4

Project Description

Agencies/Departments Impacted

 
Indiana Office of Technology
Indiana Department of Administration

21

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Steps

1. Enter new or edit existing activity information.
2. Edit contact information if applicable.
3. Edit budget information if applicable.
4. Enter all project information fields that are new for this activity type.

Notes

1. The activity type numbering sequence is retained.
2. All fields that are shared between activity types are pre-populated with the information entered and saved for that activity.

4.4.13 Review, Edit and Submit Operating Plan Line Item after Operating Plan is Submitted

Operating Plan 99999-18

[Show Feed](#)

[Back to List: Agencies](#)

[Operating Plan Line Items \(5\)](#) | [Files \(0\)](#)

Operating Plan Detail

Agency Information

Owner: [Tom Morrow](#) Agency Code: 99999
Operating Plan ID: 99999-18 Fiscal Year: 2018
Agency: [CFPP Test Agency](#)

Submission Information

Status: Submitted Submitted for Review Date: 6/16/2017

Operating Plan Line Items

[New Operating Plan Line Item](#)

Action	ID	Agency Name	Activity Type	Activity Name	Owner	Status
Edit Del	99999-18-1	CFPP Test Agency	Ongoing Operations	Network Expansion	Roberta Smith	Review
Edit Del	99999-18-2	CFPP Test Agency	Project	Immunization Information System (Registry) Modernization Needs Assessment	Stella Luna	Approved - IT Project Profile Required
Edit Del	99999-18-3	CFPP Test Agency	Project	ePermitting System	Tom Morrow	Approved - IT Project Profile Required
Edit Del	99999-18-4	CFPP Test Agency	Project	Case Management System	Roberta Smith	Draft
Edit Del	99999-18-5	CFPP Test Agency	Ongoing Operations	MS Enterprise Agreement - Enterprise Desktop - 1000 users	Roberta Smith	Draft

Steps

1. Click on New Operating Plan Line Item to create a new line item.
2. Click on the Edit or Del action button to edit or delete the Operating Plan Line Item.

IMPORTANT: The Edit action button allows editing the summary level Operating Plan Line Item information and not the activity resources associated with that line item. To access all information, click on the Operating Plan Line Item ID.

3. Click on the Operating Plan Line Item ID to edit an existing line item, including the activity resources associated with the line item.

Notes

1. Status of Operating Plan is Submitted.
2. See steps described in Sections 3.4.7 through 3.4.10 for reviewing, generating reports on, and submitting an Operating Plan for a particular fiscal year.

After the initial submission of the plan, Operating Plan Line Items may be revised (in response to an IOT request for additional information) or added or modified in response to an agency's business need, and submitted for IOT/IDOA review as needed throughout the fiscal year.

4.4.14 Update Activity Information in Response to IOT Review

Note 1

Call for Projects and Procurements
Sandbox: ACTION REQUIRED: Operating Plan Line Item 99999-18-1 Status has changed to Returned to Agency for More Information
To: tmorrow@cfpp.in.gov

Dear Tom Morrow,

IOT or IDOA have changed the Status for Operating Plan Line Item 99999-18-1 to Returned to Agency for More Information.

With this large of a capital expenditure, the Agency should describe the need for this acquisition in light of the fact that it has identified IOT Services to support its network expansion.

Please use the following link access the Project/Procurement record: <https://ind-tech.force.com/a00r0000001L8Os>

Indiana Office of Technology/IDOA

Note 2

Note 2

Note 1

IN.gov

My Agency Contacts Operating Plans **Operating Plan Line Items** Project Profiles Procurement Profiles

Operating Plan Line Item 99999-18-1

Show Feed

Back to List: Agencies

Activity Resources [1]

Operating Plan Line Item Detail

Edit Delete Change Activity Type Submit

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

Describe

Contact Information

Main Contact Stella Luna

Main Contact Email Address sluna@cfpp.in.gov

Main Contact Phone Number

Steps

1. Toggle the Show Feed/Hide Feed button to display the Chatter discussion thread.

Notes

1. IOT email notification to an agency regarding an Operating Plan Line Item review status change. In addition to an email notification, any change to the review status and explanation of status is displayed on the Operating Plan Line Item page.

IMPORTANT: If an Operating Plan Line Item is returned to an agency for more information during the 30-day IOT review period, the review period will be reset upon submission of the updated Operating Plan Line Item information.

2. The Operating Plan Line Item ID is displayed at top of page. A discussion thread started from this page is specific to the Operating Plan Line Item.
3. After the initial submission of an Operating Plan for a given fiscal year, the Operating Plan Line Items in that plan will be independently reviewed. Subsequent status notification resulting from IOT review will be directed to the Owner of the Operating Plan Line Item, not the Owner of the Operating Plan.
4. Main Contact is typically a primary agency resource for information regarding the Operating Plan Line Item.

4.4.15 Collaborate on an Operating Plan Line Item in Response to IOT Review

The screenshot shows the IN.gov Operating Plan Line Item page for item 99999-18-1. A post by @stella_luna is visible, asking for a review of FY2018 capital expense information. A response by tom_morrow is also visible. Red arrows point to the 'Followers' link and the 'Share' button. A red circle highlights the 'Indiana Procurement Management Portal' link in the email notification.

Note 1

Note 2

Note 3

Note 4

Steps

1. Enter @[name of user] to display and select a specific user name and type the message.
2. Click on the Share button when complete.

Notes

1. When the record is saved, the system displays a topic based on context-specific keywords in the message. The system provides an option to add a topic, follow a topic, etc.