

Information Technology Policy

Integrated Project and Portfolio Management System (iPPMS)

ITP Number ITP-EPM001	Effective Date May 26, 2006
Category Project Management	Supersedes None
Contact RA-ITCentral@pa.gov	Scheduled Review Annual

1. Purpose

The purpose of this ITP is to establish enterprise-wide standards and provide guidance for the use of enterprise project, portfolio and program management technology. The purpose of the Integrated Project and Portfolio Management System (iPPMS) is to:

- improve project delivery, so projects can be completed successfully, meeting or exceeding customer expectations on time and within budget
- improve the ability of agencies and the enterprise to align IT spending with strategic goals and initiate projects that have the lowest total cost of ownership
- standardize project management processes and terminology, so employees and vendors from different organizations can collaborate effectively on projects
- standardize technology to achieve cost savings from economies of scale and efficient administration of the system

2. Scope

This Information Technology Policy (ITP) applies to all departments, boards, commissions and councils under the Governor's jurisdiction. Agencies not under the Governor's jurisdiction are strongly encouraged to follow this ITP to ensure they develop and implement applications that facilitate enterprise-wide interoperability and standardization.

3. Background

The iPPMS provides functionality in several areas, including project management, resource management, financial management, and portfolio and program management. This wide array of integrated features automates work in most every aspect of the Enterprise Project Management Methodology, and will support the efforts of agencies to track and manage groups of projects in project or program management offices or from more traditional IT organizations. In this respect it is different from software that automates one – or a few – functions, such as work plans and requirements management, among others.

The iPPMS will simplify and enhance the ability of project managers and other users to better:

- manage individual projects by enforcing the use of the standardized Enterprise Project Management Methodology (EPMM) and associated development methodologies by using automated tools to:
 - create project work plans and monitor project status;
 - develop and manage project budgets, in part using real time spending data from the Commonwealth's SAP system to compare actual spending against budget;

- create and manage resource pools that enable project managers to identify and provision staff to tasks in projects based on their skills and availability;
- collaborate and manage workload in part through automatically notifying team members of work that moves through defined business processes;
- track the time employees and vendors spend on projects;
- define, review, approve and prioritize projects based on business goals, at the agency and enterprise level through the portfolio management process known at the enterprise level as the Communities of Practice process.
- track and manage groups of projects at the agency and enterprise levels using reporting tools, such as executive dashboards, to view task, time, financial and other data; this approach is known as program management.

The technology is generally comprised of a database that captures data that users input into pre-formatted template forms, from which reports are provided. It is integrated with a workflow engine, the Commonwealth’s e-mail and financial management systems, and the existing single-sign on system, so authorized users can simply turn it on to perform work routed to them in their queue, without switching from one system to another.

4. Policy

All current IT projects will be subject to review for compliance with this standard through the Procurement Review Process.

The Office of Administration, Office for Information Technology (OA-OIT) will define a baseline enterprise configuration for the iPPMS system. This baseline enterprise configuration details the enterprise project and portfolio management standards.

OA-OIT will have full authority to administer the system and baseline enterprise configuration under this standard, although it may delegate or share some of this administrative authority to individual agencies on a case by case determination. No agency may alter or delete any part of the baseline enterprise configuration of the system.

All new IT projects integrating the iPPMS technology are required to use the standards and best practices defined by this document and the iPPMS enterprise configuration defined by OA-OIT. Individual agencies may configure the system to help manage other types of projects, or add or delete agency-specific business processes and tools, insofar as such changes to the system do not adversely affect the configuration and administration of the system across the enterprise or other agencies.

Agencies may continue to procure and use single-function project management software that can integrate with the iPPMS, such as MS Project, not specifically referenced in this or any other applicable ITP.

CURRENT STANDARDS

(These technologies meet the requirements of the current architecture and are recommended for use.)

Technology	Platforms	Category	Technology Classification
Clarity – IT Governance Solution	All	--	Current
Approved, compatible scheduler tools to be used in conjunction with Clarity <ul style="list-style-type: none"> ● Microsoft (MS) Project ● Open Workbench 	All	--	Current

CONTAIN

(These technologies no longer meet the requirements of the current architecture and are not recommended for use. They are to be phased out over time. No date has been set for their discontinuance.)

Technology	Platforms	Category	Technology Classification
Microsoft Project Server (integrated suite of MS products)	All	--	Contain

RETIRE

(These technologies are being phased out. Plans are to be developed for their replacement, especially if there is risk involved, such as lack of vendor support. A date for retirement has been set.)

Technology	Platforms	Category	Technology Classification
N/A	--	--	Retire by mm/dd/yy

EMERGING / RESEARCH

(Emerging / research technologies have the potential to become current standards. At the present time, they are to be used only in pilot or test environments where they can be evaluated. Use of these technologies is restricted to a limited production mode, and requires approval of a waiver request.)

Technology	Platforms	Category	Technology Classification
N/A	--	--	Emerging / Research

5. Related ITPs/Other References

N/A

6. Authority

[Executive Order 2011-05](#), Enterprise Information Technology Governance

7. Publication Version Control

It is the user’s responsibility to ensure they have the latest version of this publication, which appears on <https://itcentral.pa.gov>. Questions regarding this publication are to be directed to RA-ITCentral@pa.gov.

8. Exemption from This Policy

In the event an agency chooses to seek an exemption, for reasons such as the need to comply with requirements for a federally mandated system, a request for waiver may be submitted via the Commonwealth of PA Procurement and Architectural Review (COPPAR) process. Requests are to be entered into the COPPAR Tool located at <http://coppa.oa.pa.gov/>. Agency CIO approval is required.

This chart contains a history of this publication’s revisions:

Version	Date	Purpose of Revision
Original	05/26/2006	Base Document
Revision	11/18/2010	Refresh
Revision	01/30/2015	Reformat to ITP standard Merged STD-EPM001A into ITP