Division of Administration

Office of Information Technology

IT REQUEST WORKFLOW SYSTEM

USER MANUAL

Version 6.7 – November 10, 2011

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Overview

The Office of Information Technology (OIT), within the Division of Administration, and under the authority of R.S. 39:15.1, et. seq., is responsible for reviewing, coordinating, and standardizing information technology procurement, information technology budgeting, and information technology personnel and training.

To fulfill this obligation, OIT designed a set of IT Request forms (called the IT-10 and the IT-0) that provide agencies a standardized method to submit IT plans for OIT review. The types of IT initiatives that require OIT review and approval (and thus the use of these procedures), can be found on the OIT web site at Criteria for Submittal of an IT Request. Initiatives which meet these criteria for submittal of an IT request must obtain OIT approval prior to Procurement Support Team (PST) review and prior to any associated procurements or contracts.

Originally, IT Request forms were designed using Word and Excel and submitted to OIT via email. Beginning in 2007, OIT designed the web-based workflow tool which is the subject of this document, the IT Request Workflow system, to automate submittal of Information Technology (IT) and telecommunications related initiatives to OIT for review and approval.

The IT-Request Workflow system allows agencies to:

1. Manage the IDs and roles of the users in their agency.
2. Draft IT requests online and route internally to their agency IT Director, budget analyst, and Undersecretary for review and approval prior to routing to OIT for review.
3. Search for IT requests using log numbers, status, or key words.
4. Track the status of submitted items with automated tracking tools.
5. Review the history of current and past IT requests.
6. Create forms/reports using agency IT request data.

The IT Request Workflow System contains historical records dating back to FY05-06. All approved IT requests from FY05-06, FY06-07 and FY07-08 are stored in the IT Request Workflow System. (IT requests for FY05-06, FY06-07 and FY07-08 that were not approved are not stored in the system.) Beginning in FY08-09, all IT requests are stored in the IT-10 workflow system, regardless of approval status.

The Review and Approval Process

There are two different types of IT-10 request:

The ***Budget Request*** IT-10 was designed to document IT initiatives submitted as part of the agency's annual budget package. Ideally, significant IT requests should be anticipated in advance, coincide with an IT strategic plan, and be submitted as part of an agency's budget package at budget preparation time (usually in November). IT requests submitted this way are reviewed as a group.

The ***Mid-Year*** IT request process was designed to process initiatives that were not anticipated in time to be included in the annual budget process as a Budget Request. Mid-Year requests are reviewed on an individual basis, and follow a slightly different routing process.

See the flowcharts on the following pages to understand how the routing of Budget requests differ from the routing of Mid-Year requests.

Technical Requirements

- ✓ The only browser supported by the Workflow System is MS Internet Explorer.
    - o If popup blocker is enabled, the following must be input as an allowed site for the System to work: *.bpm.doa.la.gov
- ✓ Adobe Reader and MS Excel are needed to view reports.

Budget IT Request Process Flowchart

Submission of Budget IT Requests typically coincides with submission of Agency budgets to the Office of Planning and Budget. IT Requests are typically due to OIT by November 1 each year, unless indicated otherwise by OIT.

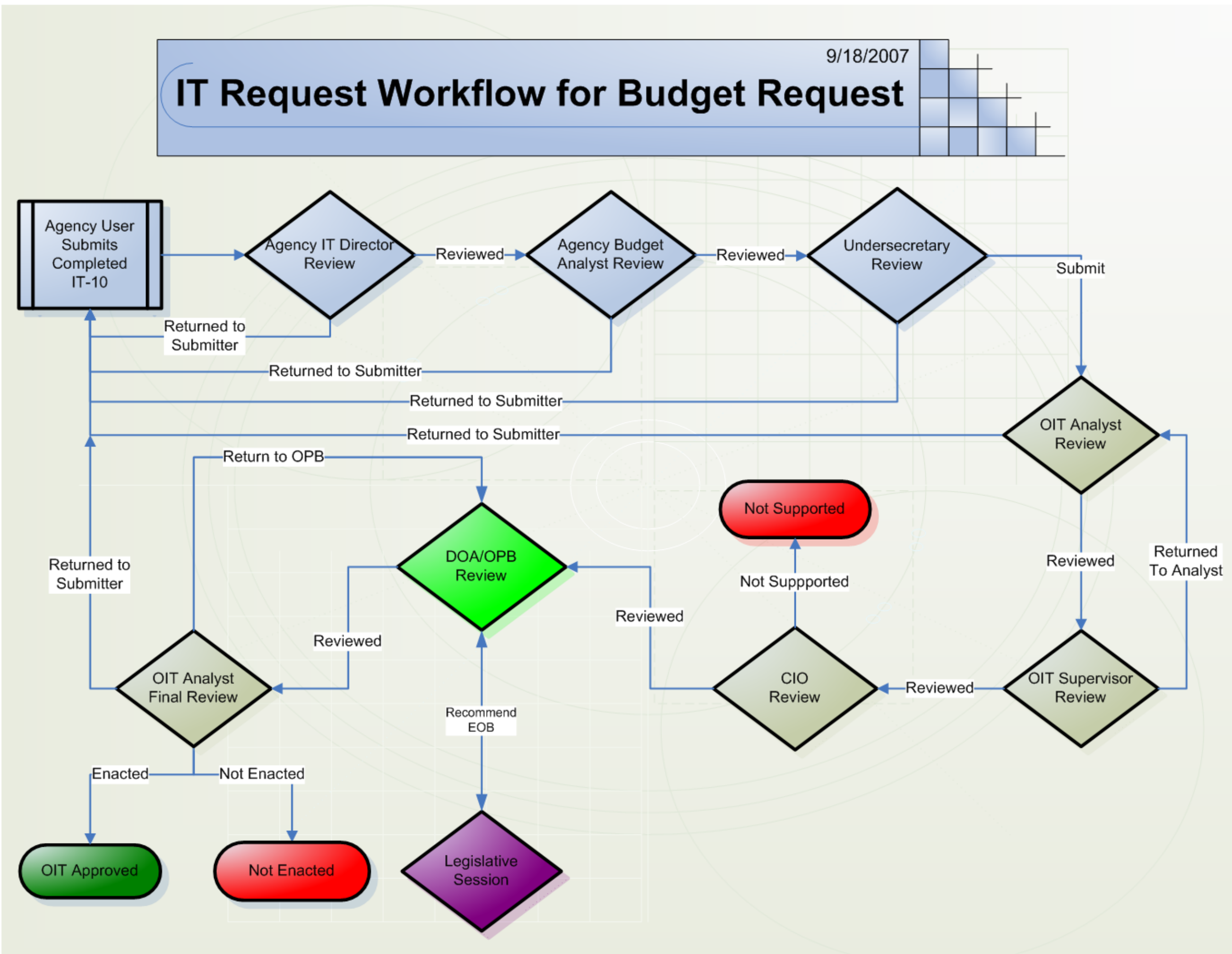


Figure 1: IT Request Workflow Diagram for Budget Process

Mid-Year IT Request Process Flowchart

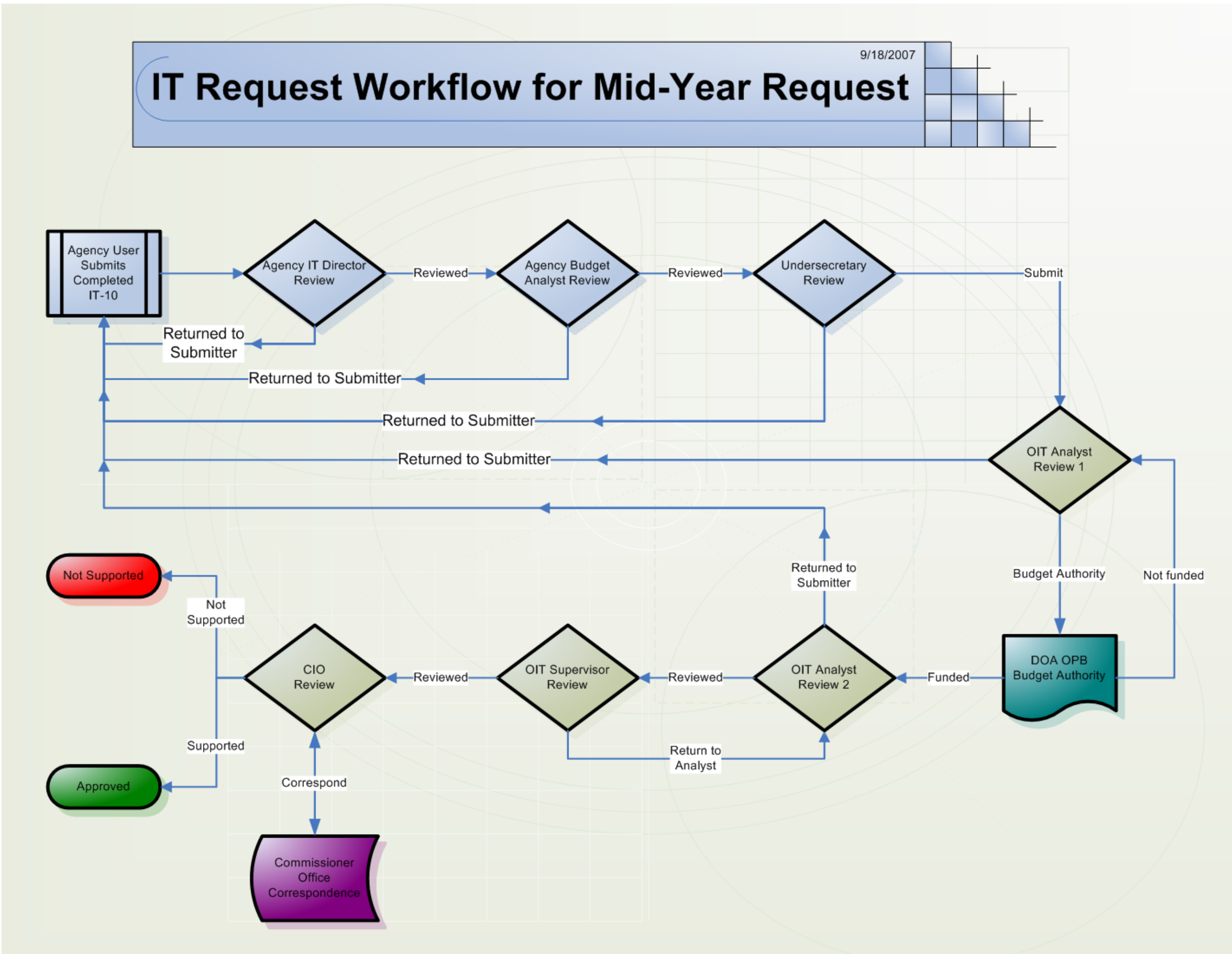


Figure 2: IT Request Workflow Diagram for Mid-Year Process

User Setup

In order to use the web-based IT Request Workflow system, each organization must decide who in their organization will participate in the administration, submittal, and review process for IT requests. Agency participants will require User IDs and passwords, and each user will be designated to perform one or more roles on behalf of the organization during the IT review process.

To start, each organization should assign one person to serve as Department Administrator. The Department Administrator will be the primary point of contact with OIT for the initial setup of users for the organization, and will be trained to perform ongoing coordination and support on behalf of their organization.

The following section provides an overview of the various roles and duties of each participant in the IT Request review process.

User IDs and roles must be predefined ***before*** an organization can submit their first IT Request for processing**.**

Roles Overview

Agency Roles:

Department Administrator - The Department Administrator serves as liaison between the organization and OIT for the initial setup of user IDs, and ongoing maintenance of IDs and roles. Responsibilities include Manage User Roles and Manage User Profile.

Submitter - A submitter has the lowest level of rights for a person in an organization. By default, registered users whose access has been approved by the Department Administrator are designated with the role of Submitter. A Submitter's authority is limited to managing their own ID, creating/updating an IT Request, and tracking their own requests. In order for a Submitter to be granted additional rights, the Department Administrator must assign them to additional roles.

IT Director - The IT Director is responsible for reviewing the request which was drafted by a Submitter, including technical aspects, adherence to OIT and departmental policies and standards, and making sure that the request aligns with one or more objectives in the IT Strategic Plan for the organization. The IT Director role may be granted to any registered user by a Departmental Administrator. Multiple registered users may share the role of IT Director, but only one user will be considered "primary" and only the primary IT Director has the authority to approve an IT Request. All other users will be considered backups without the authority to approve an IT Request. When an IT Request is created and submitted for approval, the IT Director is notified via email and is the first person in the agency review process. For a more detailed explanation of the Departmental IT Director functionality, see IT Director Review.

Budget Analyst - The Budget Analyst is responsible for assuring that funding for the IT Request is identified and accurately reflected in the means of financing portion of the request. The Budget Analyst role may be granted to any user registered by a Departmental Administrator. Multiple registered users may share the role of Budget Analyst, but only one user will be considered primary and only the primary Budget Analyst has the authority to approve an IT Request. All other Budget Analysts will be considered backups without the authority to approve an IT Request. After an IT Request is approved by the IT Director, the Budget Analyst is notified via email and is the second review step in the IT Request approval process. For a more detailed explanation of the Budget Analyst functionality, see Budget Analyst Review.

Undersecretary - The Undersecretary is responsible for ensuring that an IT Request has the approval of executive management and the request is aligned with the objectives of the agency's strategic plan. The Undersecretary role may be granted to any registered user by a Departmental Administrator. Multiple registered users may share the role of Undersecretary, but only one will be considered primary and have the authority to approve an IT Request. All other Undersecretaries will be considered backups without the authority to approve an IT Request. After an IT Request is approved by the Budget Analyst, the Undersecretary is notified via email and is the third review step in the IT Request approval process. Undersecretary approval is the final step in the agency review process. Once an Undersecretary approves an IT Request, it is routed to OIT for review. For a more detailed explanation of the Departmental Undersecretary functionality, see Undersecretary Review.

Once the agency has decided who will perform each of the above roles, the Department Administrator should complete an Agency Roles Registration Form and e-mail the form to ITRequest@la.gov . OIT will assist in setting up an initial set of users and roles in the workflow system. Thereafter, additional agency users can self-register (see User Registration) and users will be administered by their organization's Department Administrator.

Division of Administration Roles:

OIT Analyst - The OIT Analyst is responsible for reviewing all technical and business aspects of an IT Request for cost, compliance with policies and standards, procurement laws, and adherence to short and long-range strategic plans for the state. The OIT Analyst must be a registered user of the Division of Administration and is set up by an OIT Administrator. Each organization is assigned an OIT Analyst as an IT Request Reviewer and as a liaison for all other interaction with OIT (see OIT Departmental Assignments.) For a more detailed explanation of the OIT Analyst functionality, see OIT Analyst Review.

OIT Supervisor - The OIT Supervisor is responsible for quality assurance and enterprise oversight of all IT Requests before they are forwarded to the CIO for review. The OIT Supervisor must be a registered user of the Division of Administration and is set up by an OIT Administrator. For a more detailed explanation of the OIT Supervisor functionality, see OIT Supervisor Review.

CIO - The state's Chief Information Officer (CIO) has the ultimate authority to approve or reject an IT Request. The CIO must be a registered user of the Division of Administration and is set up by an OIT Administrator. For a more detailed explanation of the CIO functionality, see CIO Review.

OIT Administrator - OIT Administrator user authority may be given to any registered user of the Division of Administration by another OIT Administrator. OIT Administrators can perform most administrative functions.

OPB Analyst - The Office of Planning and Budget (OPB) Analyst is responsible for verifying that the funding requested by an agency is consistent with the agency's approved budget. The OPB Analyst role must be a registered user of the Division of Administration and is set up by the DOA OPB Administrator. For a more detailed explanation of the OPB Analyst functionality, see DOA/OPB Budget Analyst Review.

OPB Administrator - OPB Administrator user authority may be given to any registered user of the Division of Administrator by an OIT Administrator to assign OPB Analysts to specific agencies for the purpose of reviewing agency requests.

New User Registration

To set up a new user ID for access to the IT Request Workflow System, click on the ***Click here to become a registered user*** link located at the top right of the Welcome Screen .

Figure 3: OIT – IT Request Workflow System Login Page

As shown in Figure 44 below, a user registration form will appear.

1. **Complete the form:**

Note: Fields marked with an asterisk (*) are required fields and must be completed before the form can be submitted.

Organization*	Select the appropriate organization that you are affiliated with. User editable until registration is approved.
First Name * **Last Name ***	
Title	Applicant's Job Title
Address	Enter the applicant's work address, city, state, zip code, and country where the address is located.
E-Mail *	Enter a valid email address. This email address will be used for routing requests, workflow correspondence, and approvals.
Phone Number *	Enter the area code and work phone number.
Username *	Enter a username that will be used to log into the system. The username may ONLY consist of characters a-z, 0-9 and underscores.
Password *	Enter a password to be used to log into the system. password must: – Consists of ONLY the characters a-z, 0-9 and underscores

- Have 5 characters or more
- Contain at least 1 number

To ensure that you have entered the password correctly, re-enter the password in the next field.

2. **Review and Agree to the Terms of Service:**
   To agree to the terms of service and submit the form, press the ***I Agree*** button at the bottom of the page. Otherwise, click the ***Cancel*** button to cancel the registration and return to the Login Page.

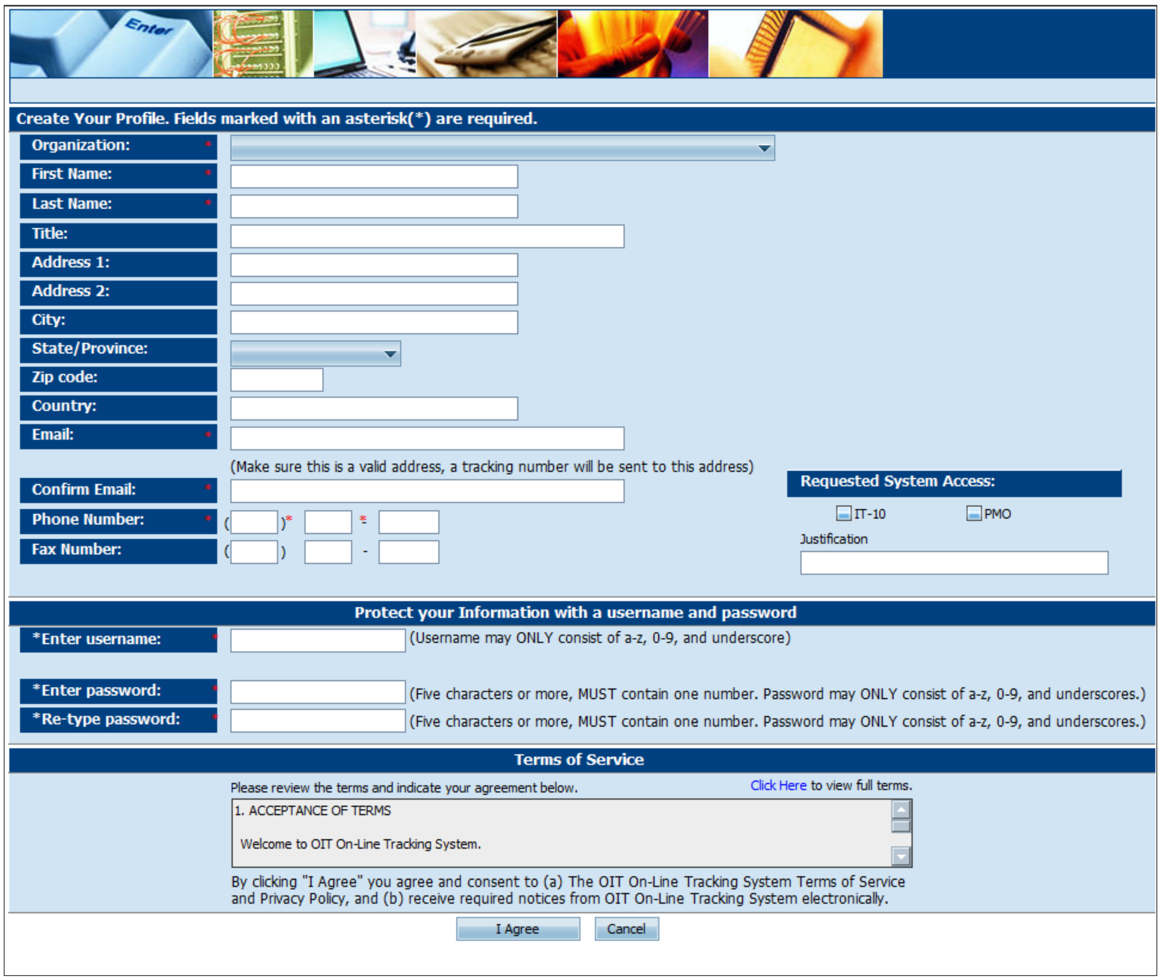


Figure 4: New User Registration

3. **Registration Request is Placed in Pending Status Until Approved**

   All registration requests for new user IDs are placed in a pending status until approved by a Department Administrator for the organization. The Department Administrator will receive email notification when a new user requests registration. Once a pending user is approved for access to the IT Request Workflow System, an email is sent to notify the user of the approval.

If the new user changes Agency affiliation, an email will be sent to the previous organization notifying them of the change and a new notification will be sent to the newly selected agency.

If the Department Administrator has not responded to a registration request in a reasonable amount of time, you may call OIT at 225.342.9470 to request that OIT coordinate assistance.

Manage Your User Account

Once a user ID has been created, to change or update user account information, such as organization, name, address, e-mail address, phone number, and password, go to the Welcome Screen (Figure 3), Logon with user ID and password, then click the ***My User Profile*** button as seen in Figure 5 below.

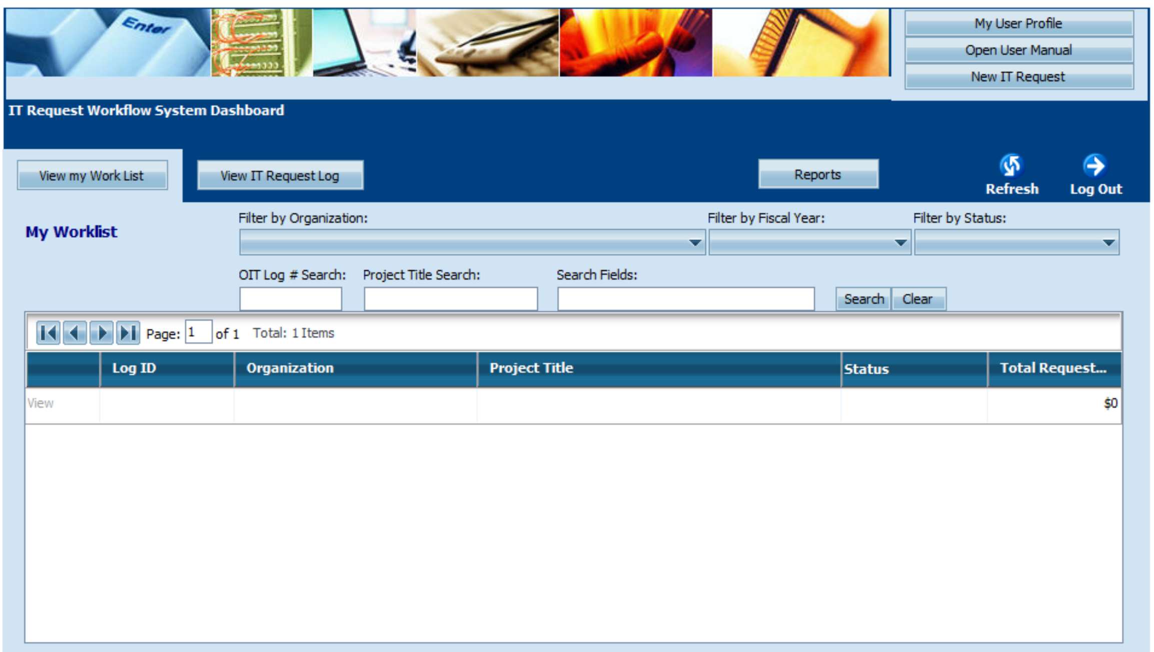
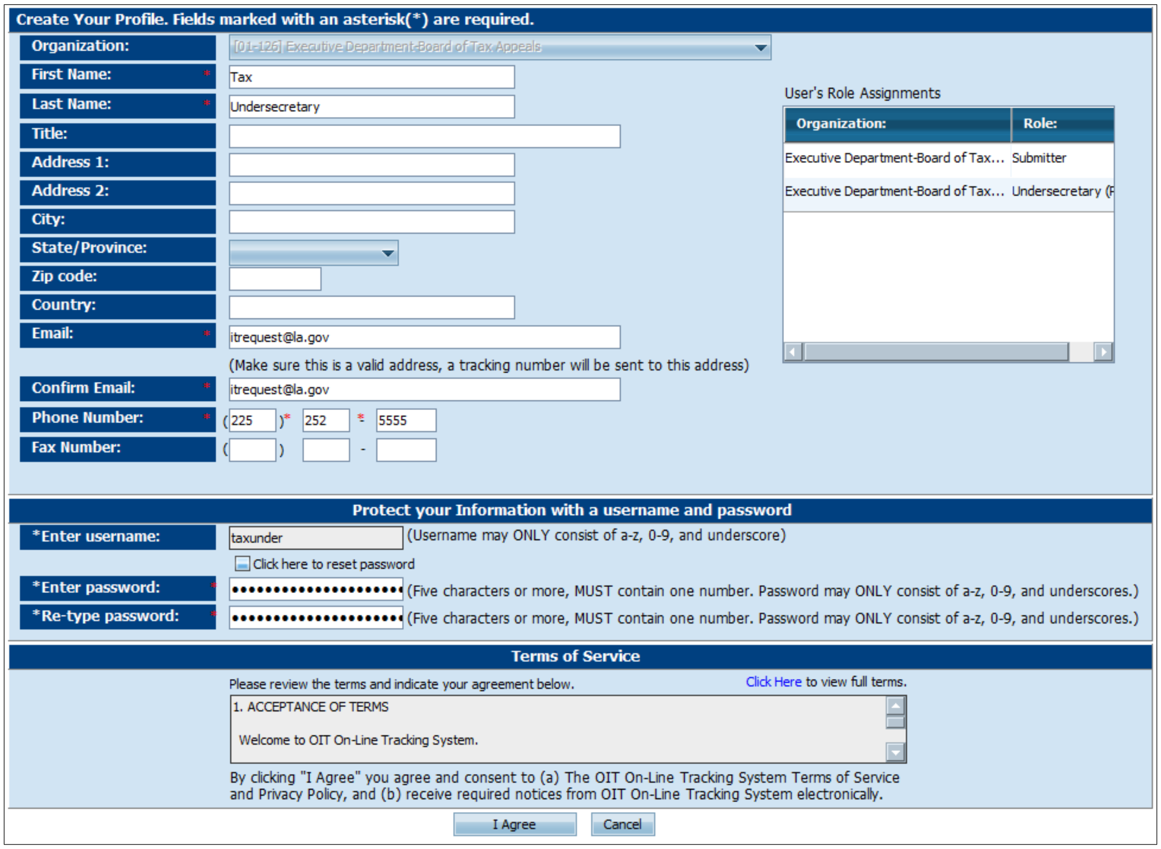


Figure 5: IT Request Workflow System Dashboard



Create Your Profile. Fields marked with an asterisk(*) are required.

Organization:	[01-126] Executive Department-Board of Tax Appeals
First Name: *	Tax
Last Name: *	Undersecretary
Title:	
Address 1:	
Address 2:	
City:	
State/Province:	
Zip code:	
Country:	
Email: *	itrequest@la.gov (Make sure this is a valid address, a tracking number will be sent to this address)
Confirm Email: *	itrequest@la.gov
Phone Number: *	(225)* 252 * 5555
Fax Number:	( ) -

User's Role Assignments

Organization:	Role:
Executive Department-Board of Tax...	Submitter
Executive Department-Board of Tax...	Undersecretary (F

Protect your Information with a username and password

*Enter username:	taxunder (Username may ONLY consist of a-z, 0-9, and underscore)
	Click here to reset password
*Enter password: *	•••••••••••••••••••• (Five characters or more, MUST contain one number. Password may ONLY consist of a-z, 0-9, and underscores.)
*Re-type password: *	•••••••••••••••••••• (Five characters or more, MUST contain one number. Password may ONLY consist of a-z, 0-9, and underscores.)

Terms of Service

Please review the terms and indicate your agreement below. Click Here to view full terms.

1. ACCEPTANCE OF TERMS

Welcome to OIT On-Line Tracking System.

By clicking "I Agree" you agree and consent to (a) The OIT On-Line Tracking System Terms of Service and Privacy Policy, and (b) receive required notices from OIT On-Line Tracking System electronically.

I Agree Cancel

Figure 6: My User Profile

Update information as required, then click on ***I Agree*** to save changes.

For more information about data on this page, please see the User Registration section of this manual.

Administrative Functions

Administrative functions are tasks that can only be performed by a Department Administrator, OPB Administrator, or OIT Administrator.

1. Department Administrator
   - Manage User Roles
   - Manage User Profile
2. OPB Administrator
   - Assign Analyst to Department
3. OIT Administrator
   - Manage User Roles
   - Assign Analyst to Department
   - Manage Code Tables
   - Assign Analyst to Department

Manage User Roles

From the Dashboard, select the ***Manage Users*** button to access the ***User Management Screen*** where you can assign roles to users within your organization. Any number of users can be created for an organization, and any number can be assigned a given role. However, there can be only ONE primary user for each role. Only the primary user will receive email notifications regarding an IT Request. Only the primary user will be able to act on the IT Request from within their Worklist.

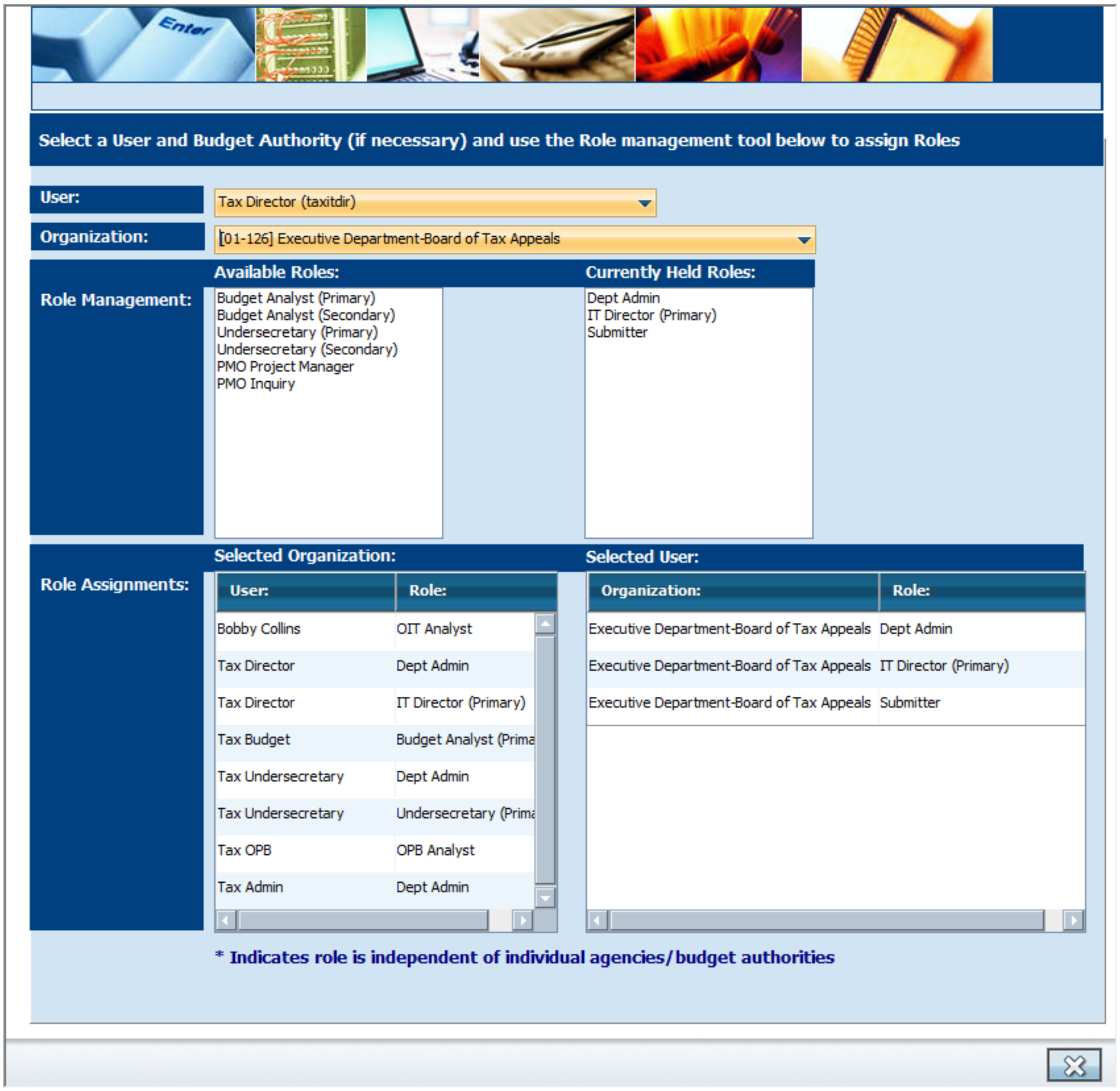


Figure 7: Manage User Roles

See Agency Roles to review the duties for each role. There can only be one Primary reviewer for each role. Only the Primary can approve a request.

To assign a role to the displayed user:

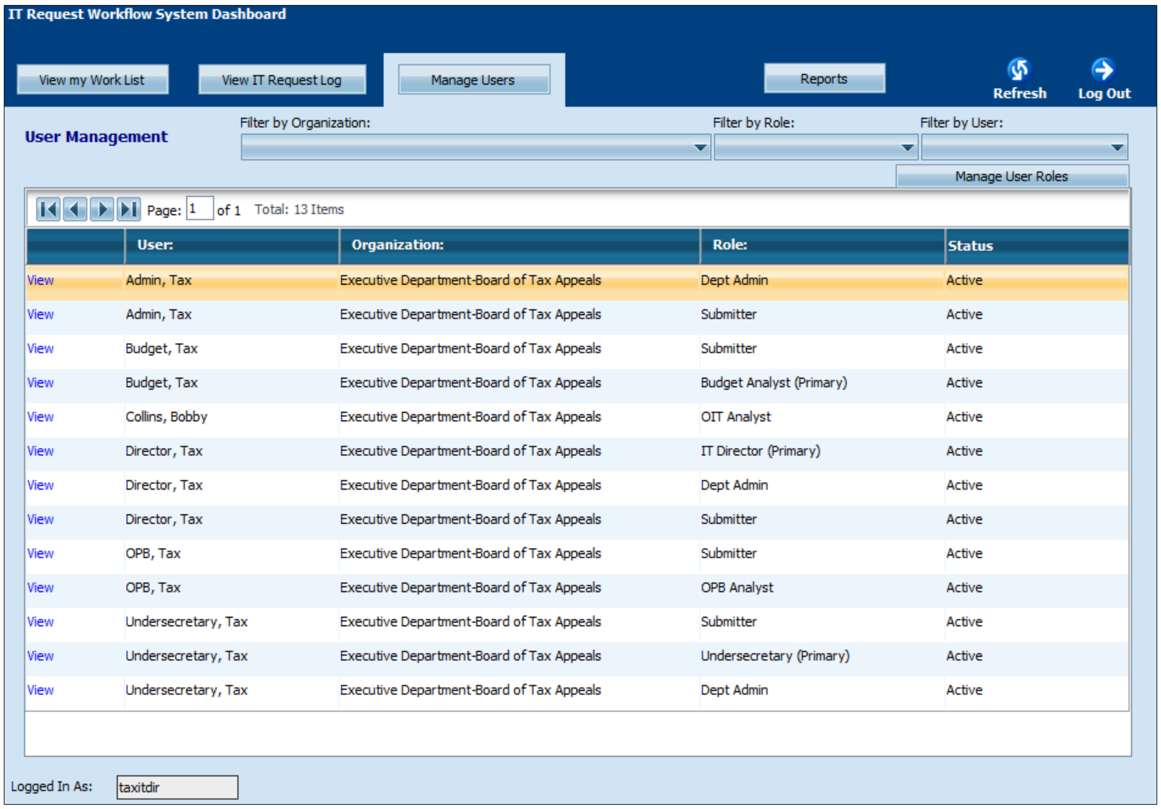
> Select the desired role from the ***Available Roles*** list and use the **“>”** button to add the role to ***Currently Held Roles***.

To remove a user role:

> Select the desired role from the ***Currently Held Roles*** list and use the **“<”** button to remove.

Manage User Profile

Manage User Profile is accessed from the Dashboard using the ***Manage Users*** button. The ***User Management*** table is displayed and provides a listing of existing users with their roles and security status for the organization. The Profile for a user is accessed by clicking on ***View*** in any row which contains their name.



	User:	Organization:	Role:	Status
View	Admin, Tax	Executive Department-Board of Tax Appeals	Dept Admin	Active
View	Admin, Tax	Executive Department-Board of Tax Appeals	Submitter	Active
View	Budget, Tax	Executive Department-Board of Tax Appeals	Submitter	Active
View	Budget, Tax	Executive Department-Board of Tax Appeals	Budget Analyst (Primary)	Active
View	Collins, Bobby	Executive Department-Board of Tax Appeals	OIT Analyst	Active
View	Director, Tax	Executive Department-Board of Tax Appeals	IT Director (Primary)	Active
View	Director, Tax	Executive Department-Board of Tax Appeals	Dept Admin	Active
View	Director, Tax	Executive Department-Board of Tax Appeals	Submitter	Active
View	OPB, Tax	Executive Department-Board of Tax Appeals	Submitter	Active
View	OPB, Tax	Executive Department-Board of Tax Appeals	OPB Analyst	Active
View	Undersecretary, Tax	Executive Department-Board of Tax Appeals	Submitter	Active
View	Undersecretary, Tax	Executive Department-Board of Tax Appeals	Undersecretary (Primary)	Active
View	Undersecretary, Tax	Executive Department-Board of Tax Appeals	Dept Admin	Active

Figure 8: User Management Table

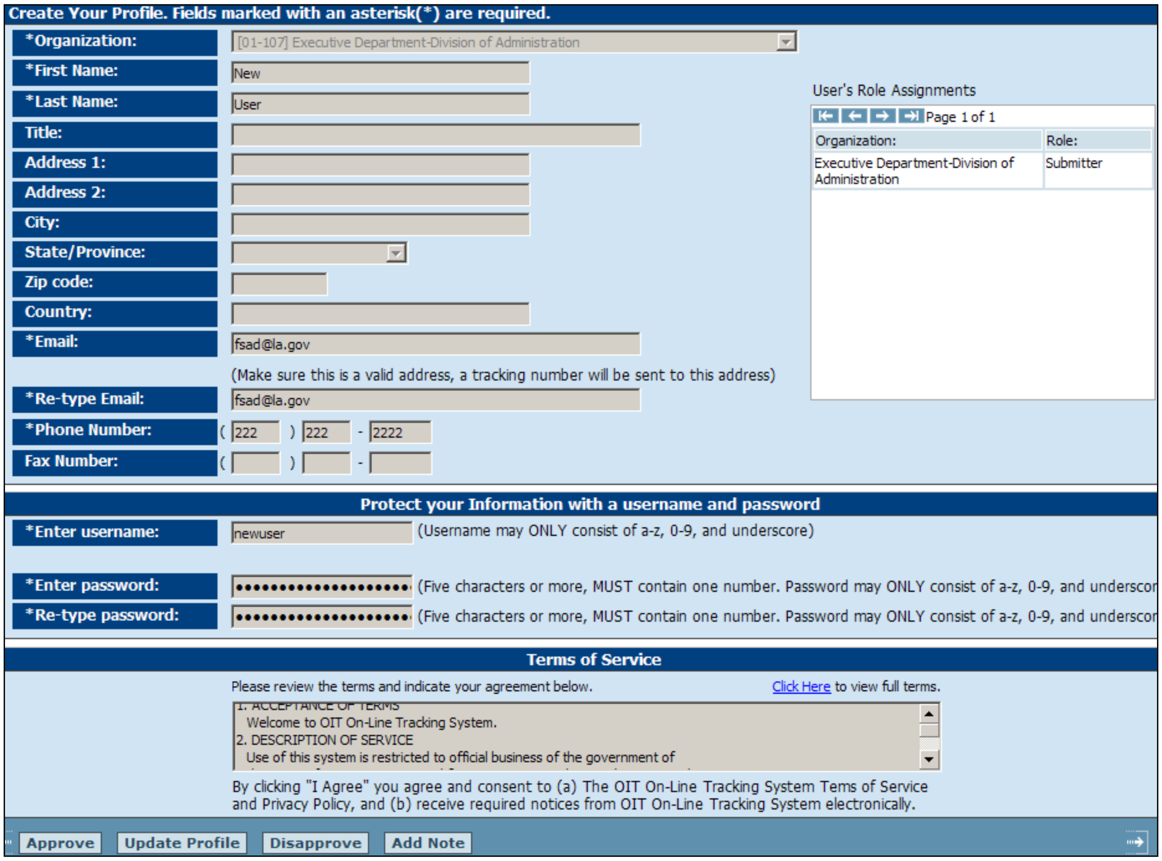


Figure 9: Manage User Profile

For newly registered users, the Department Administrator has the option to ***Approve*** or ***Disapprove*** a user's registration request. Only approved users are granted access to the system.

Department Administrators can change passwords and unlock the accounts of users within the organization they administer by selecting the ***Update Profile*** button at the bottom of the *Manage User Profile* screen. Users with OIT security permission can change the passwords and unlock the accounts of any user in any organization. A user's account will lock automatically if a user enters the wrong password ten (10) times.

Assign Analyst to Department

From the Dashboard, select the ***Manage Users*** button to access the User Management Screen.

Scroll to find the name of the Analyst and click on **View**.

Click on the ***Manage User Roles*** button.

Use the ***Organization*** drop down to select the desired organization assignment.

Assign the ***Role*** of Analyst.

Manage Code Tables

This function is limited to OIT Administrators.

On the Dashboard screen, select ***Manage Code Tables.***

Update data for Organization Codes, Object Codes and Tangible Benefit Categories.

Accessing the IT Request Workflow System

To access the IT Request Workflow System with a registered ID, use the following link: OIT - IT Request Workflow System.

Figure 3: OIT – IT Request Workflow System Login Page

To log in, go to the blue box on the right side of the Login Page and enter the ***Username*** (ID) and ***password*** you selected during registration (or one that was provided to you by your Department Administrator).

Press ***Click to login*** button (or press the enter key on your keyboard) and you will be taken to the IT Request Workflow System Dashboard as seen in Figure 5 on the next page.

Note: A user's account will lock automatically after ten (10) failed attempts.

Create/Modify an IT Request

To access the IT Request Workflow System with a registered user ID, use the following link: OIT - IT Request Workflow System.   (See Figure 3.)

To log in, go to the blue box on the right side of the Login Page and enter the ***Username*** (ID) and ***password*** you selected during registration (or one that was provided to you by your Department Administrator).

Press ***Click to login*** (or press the enter key on your keyboard) and you will be taken to the IT Request Workflow System Dashboard as seen in Figure 10.

Note: A user's account will lock automatically after ten (10) failed attempts.

To initiate a new IT request, select the ***New IT Request*** button at the top, right portion of the screen. Fill in the information as requested on the form as described in Complete the IT Request Form Steps.

To view or modify an existing request, click on the ***View*** link for the specific request. Edit the information you wish to modify on the form as described later in this manual in Complete the IT Request Form Steps.

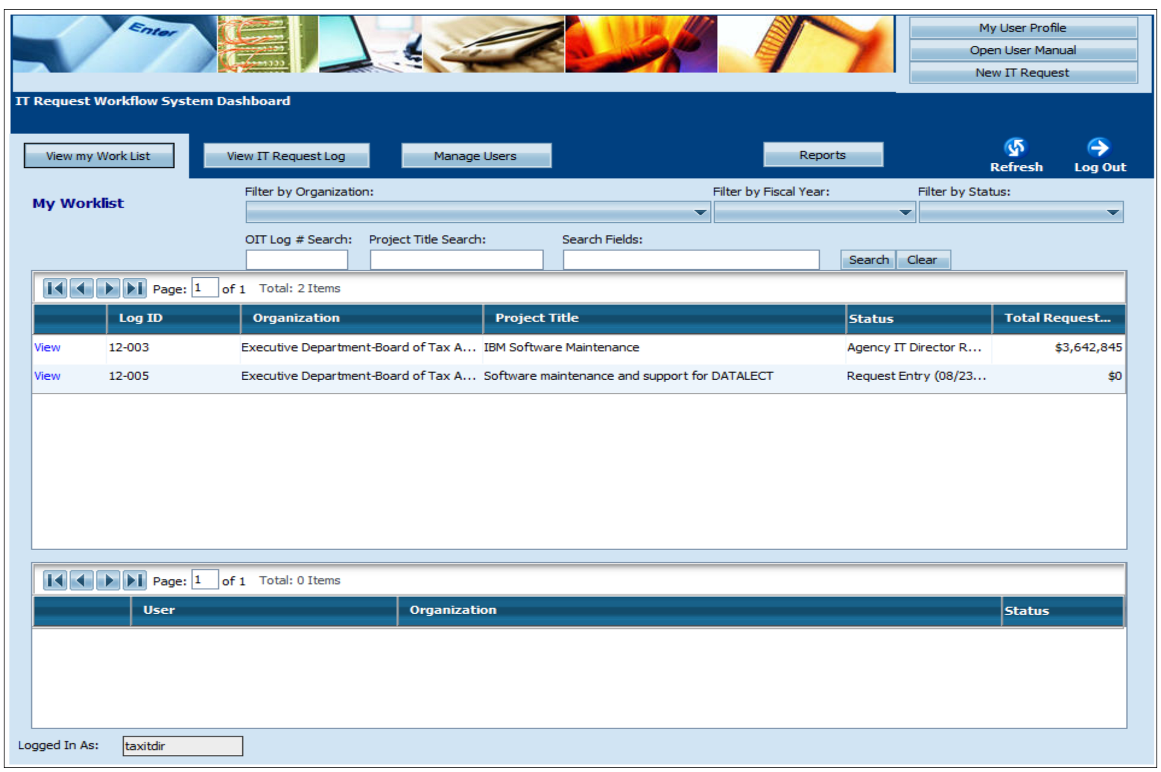


Figure 10: Dashboard

Complete the IT Request Form Steps

Overview - Navigating Through Form Steps

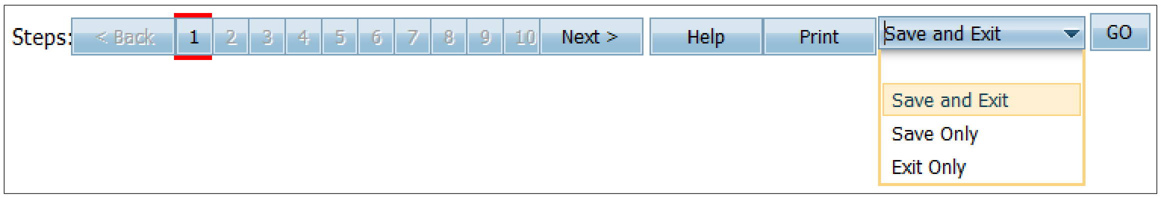


Figure 11: IT Request Step Navigation

Form Steps: Use the steps at the bottom of the screen to navigate through the pages of your form. Each portion of the IT-10 form is represented by a step number. The form step icons allow you to easily navigate from section to section of the form. To see what information is included in each step of the form, use your mouse to hover over the number.

Each time you move from one step to another or hit the **Next** button on any step, the system performs an automatic save.

Help: Click on the help button to view this user manual.

Save/Exit Options: Select the option you wish to choose from the drop down box and then press the ***Go*** button.

- ***Save Only***: Saves the information you have entered without exiting the form.

- ***Save & Exit***: Saves the information you have entered and exits the form.

- ***Exit Only***: Exit the form without saving the changes made since the form was last saved.

Print: Click on the Print button to create a system-generated ITRequest in PDF format. Once the form is displayed, press the Print icon to send to your printer. For a sample IT Request PDF Report see [Sample IT Request.](#)

Step 1: Identifying Information

- ***Organization*** is a required field and must be selected from the drop down list. If the drop down list is empty, the workflow roles for your organization have not been completed correctly. Contact your Department Administrator.
- The ***Agency*** field is optional and can be used for any purpose.
- ***Contact Information*** is system-generated, based on the information from the User Profile of the Submitter's user ID.
- ***Technical and Business Contact Information*** are optional.
- ***IT Request Information Title*** is a descriptive title that is required.
- ***Starting Fiscal Year*** is selected from a drop down list. Choose the first fiscal year in which the project will incur costs.
- ***Request Type*** is system-generated based on starting fiscal year. It governs the path of the review and approval process as Budget or Mid-year.
- ***Development / Implementation Project*** indicates the project scope.

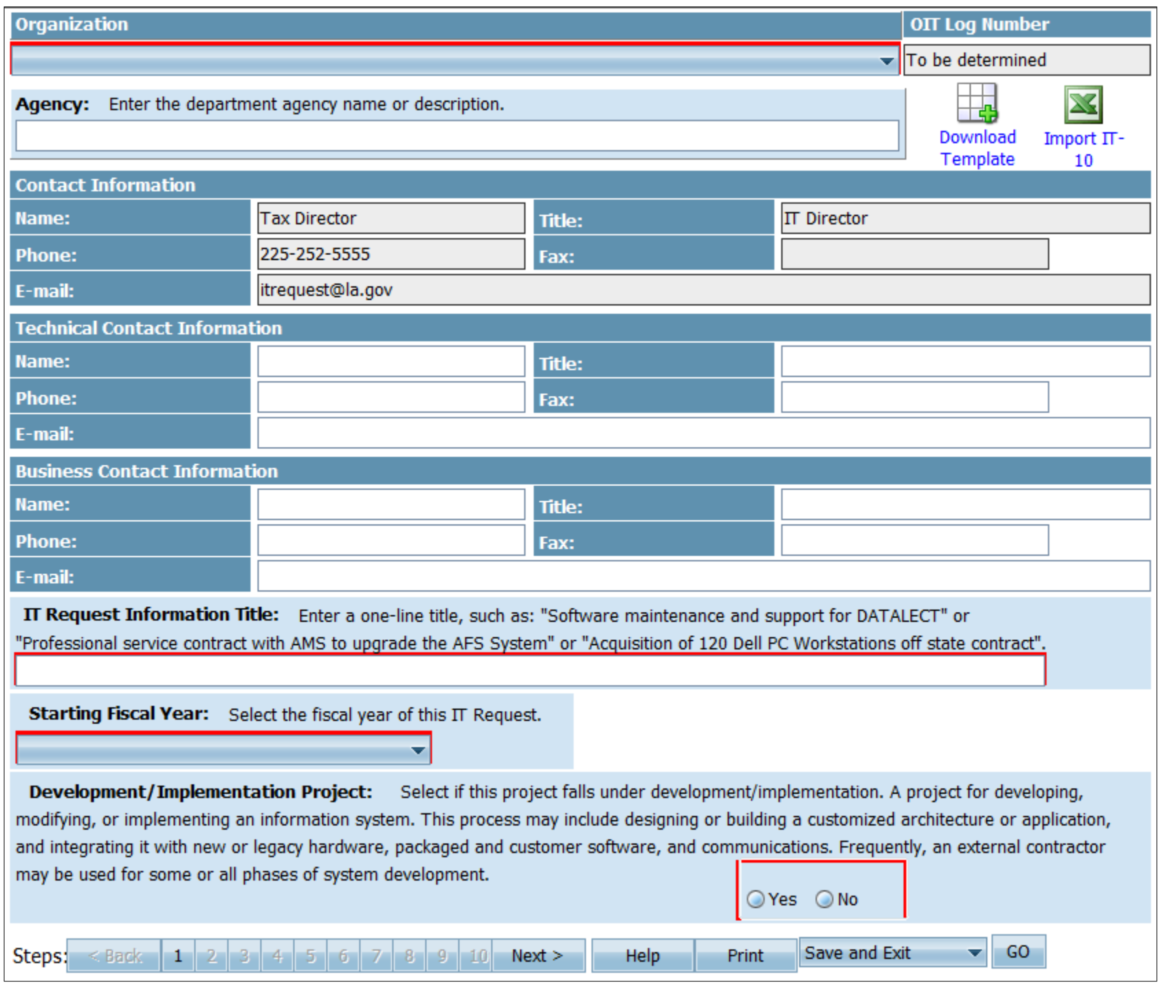


Figure 12: Step 1 Identifying Information

When creating a new IT Request, a unique ***IT Request Log number*** will be assigned when all required information has been input on Step 1 and the ***Next*** button is clicked. The first two numbers of the log number indicate the applicable fiscal year. For example, 12-219 is a request with costs that begin in fiscal year 12.

Upload Offline IT-10 Template

In some cases, the information necessary to compile an IT request for submission to OIT is gathered from a number of different people in an organization. Since there can only be one "Submitter" for a request, it may be helpful to first collect all of the information outside the IT Request system. This can be accomplished by downloading an Offline IT-10 Template (Excel Spreadsheet) and emailing it among staff for input. To download the template, press the ***Download Template*** icon in the top, right corner of ***Step 1: Identifying Information***.

Once all the data is collected in the spreadsheet, data from the Offline IT-10 Template can be uploaded into the IT-Request System using the ***Import IT-10*** icon in the top, right corner of ***Step 1: Identifying Information***. The user is prompted to select a saved template through the standard MS Windows Browse Dialogue Box.

Once the template is uploaded, all text fields from the template will automatically populate the online workflow screens and the request can be completed and submitted to OIT.

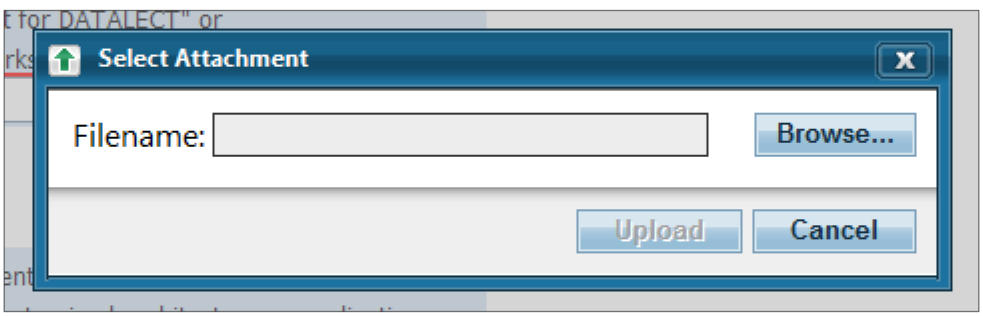


Figure 13: Import Offline IT-10 Template

Note: To assure that the system uploads the template as expected, press ***Save and Exit***, then ***Print*** to compare data content.

Step 2: IT Request Description

The information in Step 2 is required for all IT Requests.

Text fields are limited to 4,000 characters. If your detailed descriptions exceed 4,000 characters or if the descriptions are already saved in a standard electronic format (MS Office or PDF document), type "See Attached" into the text field and click on the ***paperclip icon*** to attach the supporting documentation.

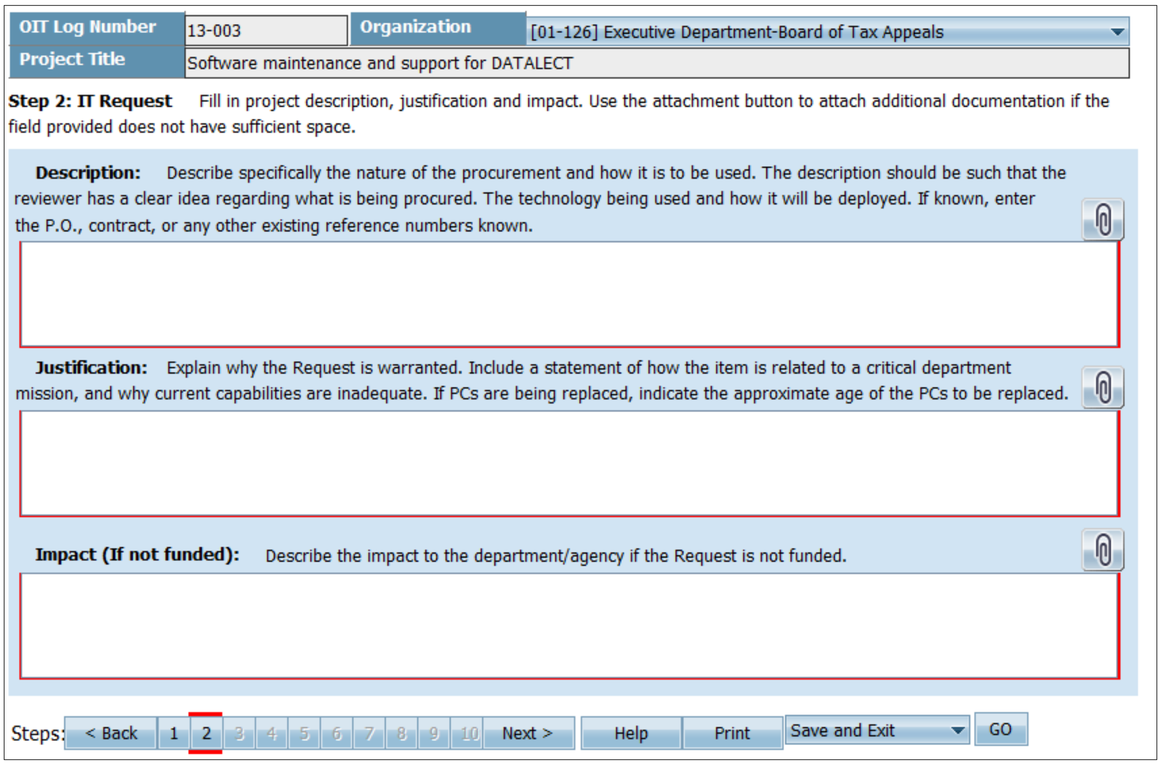


Figure 14: Step 2 IT Request Description

Note: Every time the ***Next*** button is clicked or any time the user changes Steps using the Step Navigation, an automatic save is performed by the system.

Step 3: Cost Worksheet

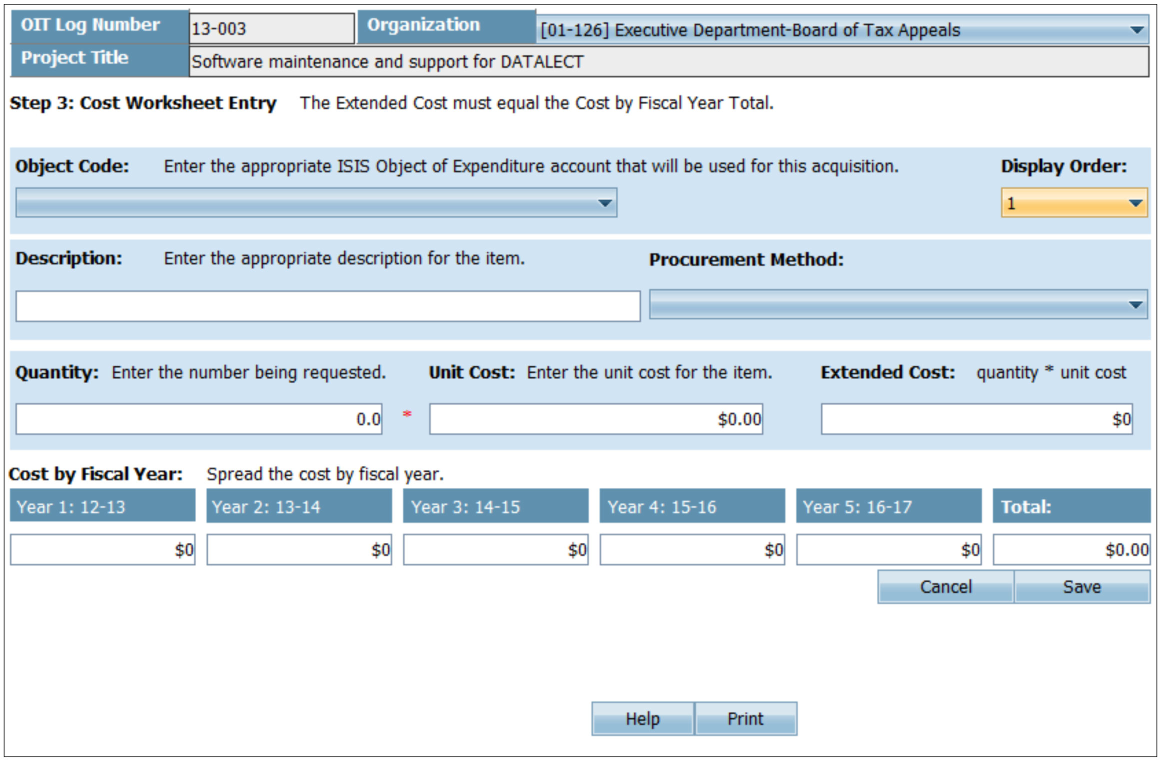


Figure 15: Step 3 Cost Worksheet Entry

Every IT Request requires at least one Cost Worksheet entry, as seen in Figure 15.

Fields

- ***Object Code*** selected from a drop down list of ISIS expenditure codes that is a subset of the complete ISIS chart of accounts. For a listing of object codes available in the system, see Object Codes.
- ***Display Order*** is used to manage the order that Cost Worksheet items will be displayed or printed in final form. If not specified, new items are added to the bottom of the list.
- ***Description*** is a text field to provide additional information about the object being procured.
- ***Procurement Method*** must be chosen for each Cost Worksheet Line item:
  - RFP - Request for Proposals
  - ITB – Invitation to Bid
  - IAT – Inter-Agency Transfer
  - State Contract
  - Purchased
  - Other

- ***Quantity*** is the number of units to be procured
- ***Unit Cost*** is the cost for each item counted in Quantity.
- ***Extended Cost*** is automatically calculated (Quantity x Unit Cost)
- ***Cost by Fiscal Year*** is input by the user. The Total is system generated.

The ***Save*** button will save the Cost Worksheet data and display the Cost Worksheet Summary Page (Figure 16) with items listed in the order designated by *Display Order*.

The ***Done*** button cannot be selected until the Extended Cost = Total Cost.

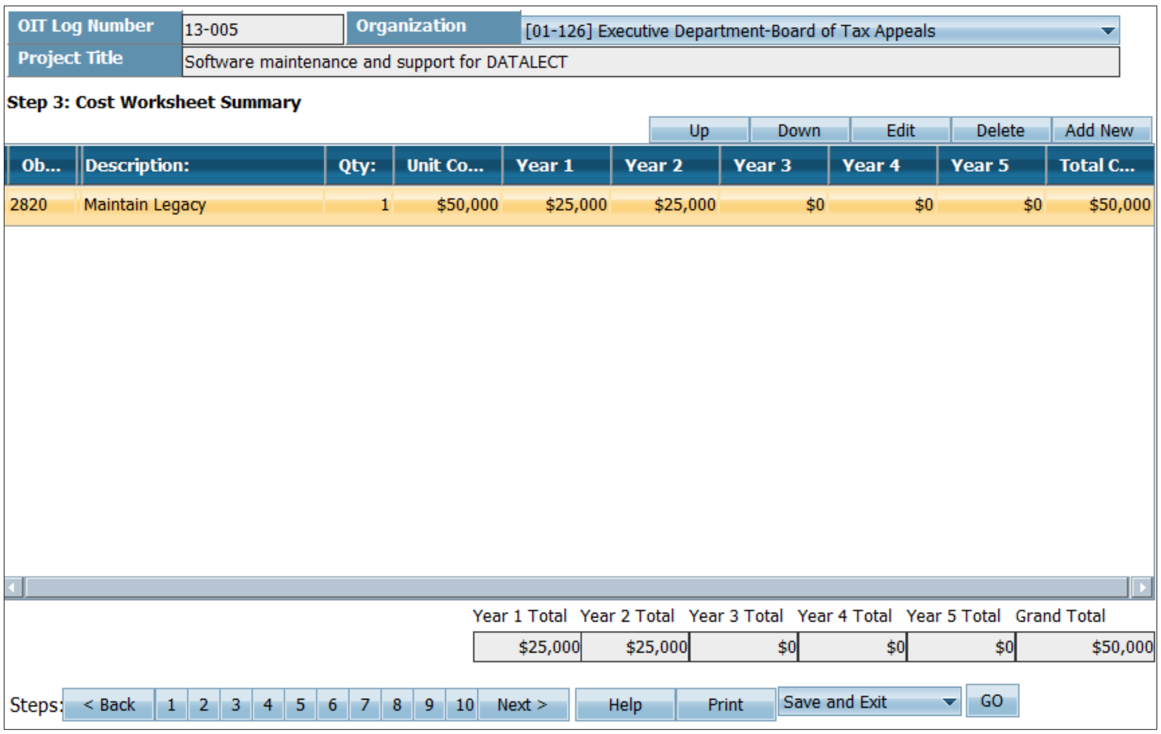


Figure 16: Cost Worksheet Summary

When updating an IT Request that was previously saved, clicking on ***Step 3*** will display the Cost Worksheet Summary.

To insert additional cost worksheet entries, click on the ***Add New*** button.

To modify or delete an existing cost worksheet line item, left click on the row and choose ***Edit*** or ***Delete***.

The ***Up*** and ***Down*** buttons can be used to change the order of the cost worksheet line items within the displayed summary and on the printed IT Request.

The ***Back*** button at the bottom of the screen takes you to Step 2 while the ***Next*** button will take you to Step 4.

Step 4: Technical Approach/Planning

Step 4 fields may be required based on data previously input into the IT Request. A red outline indicates which fields are required. The description fields are limited to 4,000 characters. If your text will not fit or if the descriptions are already saved in a standard electronic format (MS Office or PDF document), please type "See Attached" in the description field and click on the ***paperclip icon***  to attach supporting documentation.

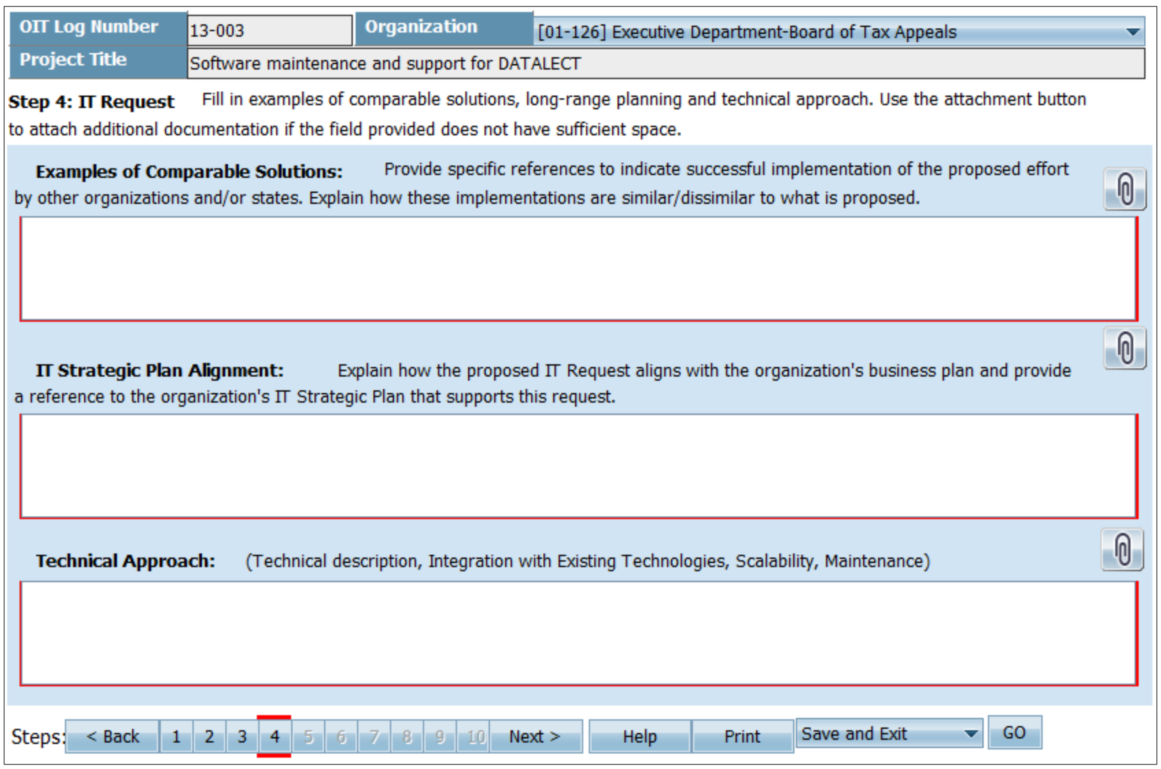


Figure 17: Step 4 Technical Approach

Step 5: Implementation Approach / Risk

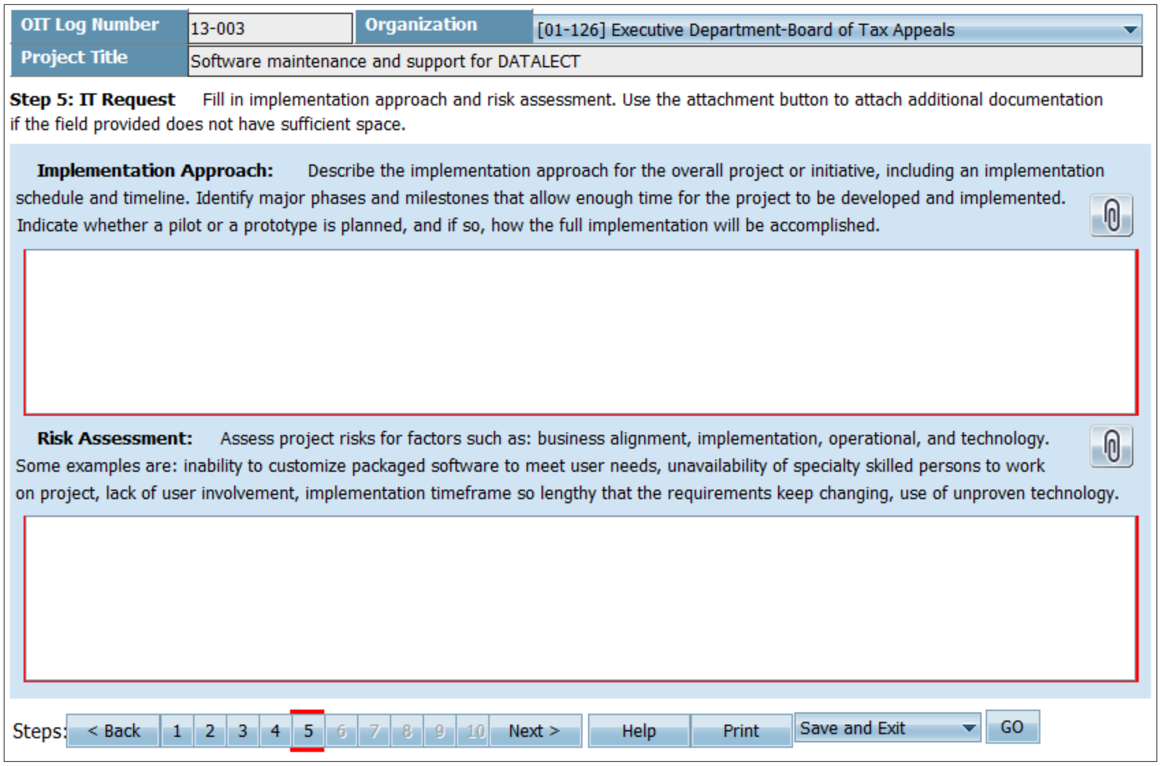


Figure 18: Step 5 Implementation Approach/Risks

Step 5 fields may be required based on data previously input into the IT Request. A red outline indicates which fields are required. The description fields are limited to 4,000 characters. If your text will not fit or if the descriptions are already saved in a standard electronic format (MS Office or PDF document), please type “See Attached” in the description field and click on the ***paperclip*** icon  to attach supporting documentation.

Click the ***Back*** button to go back to Step 4. Click the ***Next*** button to go to Step 6.

Step 6: Tangible Benefits

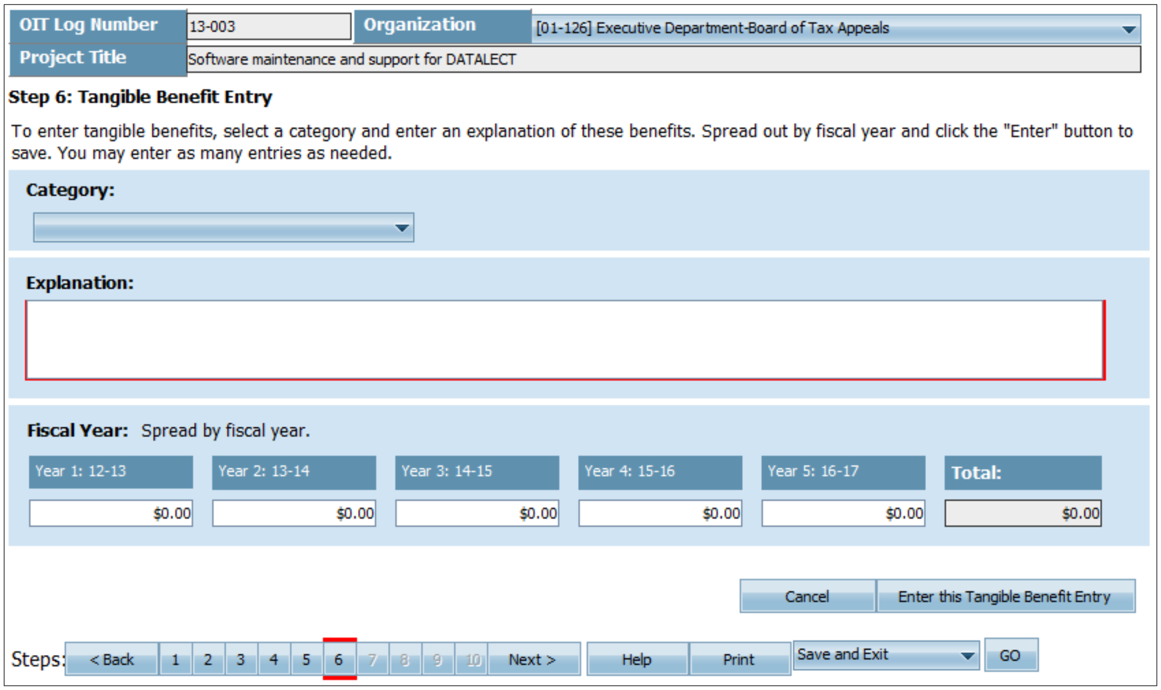


Figure 19: Step 6 Tangible Benefits

Tangible Benefits provide essential information to justify a request, especially if there is no specific mandate for the initiative.

If an amount is input in any of the Fiscal Year fields, then the Explanation is required.

Hit the ***Next*** to move to Step 7 without entering a Tangible Benefit.

Step 7: Intangible Benefits

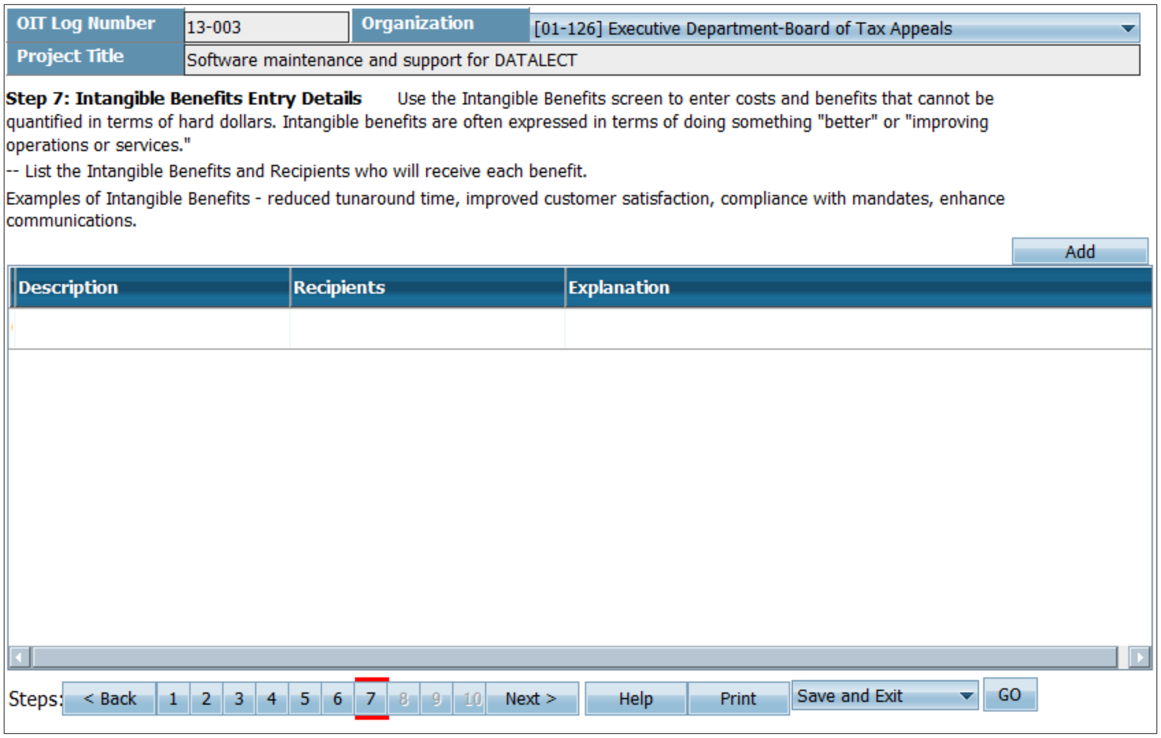
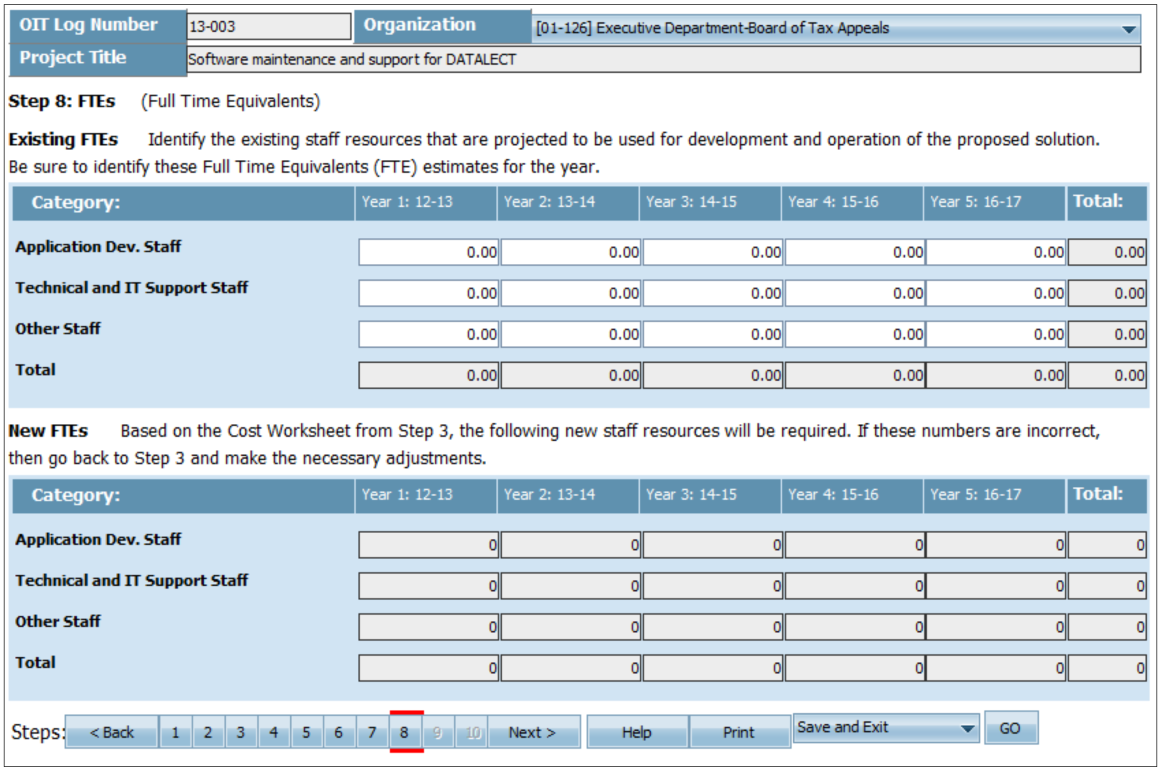


Figure 20: Step 7 Intangible Benefits

Intangible Benefits provide additional essential supporting justification for approval. If a Description is defined, then the other fields are required also.

Hit the ***Next*** to move to Step 8 without entering an Intangible Benefit.

Step 8: FTEs Dedicated to Project


OIT Log Number	13-003	Organization	[01-126] Executive Department-Board of Tax Appeals
Project Title	Software maintenance and support for DATALECT		

Step 8: FTEs (Full Time Equivalents)

Existing FTEs Identify the existing staff resources that are projected to be used for development and operation of the proposed solution. Be sure to identify these Full Time Equivalents (FTE) estimates for the year.

Category:	Year 1: 12-13	Year 2: 13-14	Year 3: 14-15	Year 4: 15-16	Year 5: 16-17	Total:
Application Dev. Staff	0.00	0.00	0.00	0.00	0.00	0.00
Technical and IT Support Staff	0.00	0.00	0.00	0.00	0.00	0.00
Other Staff	0.00	0.00	0.00	0.00	0.00	0.00
Total	0.00	0.00	0.00	0.00	0.00	0.00

New FTEs Based on the Cost Worksheet from Step 3, the following new staff resources will be required. If these numbers are incorrect, then go back to Step 3 and make the necessary adjustments.

Category:	Year 1: 12-13	Year 2: 13-14	Year 3: 14-15	Year 4: 15-16	Year 5: 16-17	Total:
Application Dev. Staff	0	0	0	0	0	0
Technical and IT Support Staff	0	0	0	0	0	0
Other Staff	0	0	0	0	0	0
Total	0	0	0	0	0	0

Steps: < Back 1 2 3 4 5 6 7 8 9 10 Next > Help Print Save and Exit GO

Figure 21: Step 8 FTEs Dedicated to Project

Step 8 is used to document all FTEs that will be working on an initiative.

Existing FTEs fields are used to document the *Application Development* and *Technical Support* Staff that will be dedicated to the project. *Other Staff* documents non-technical state resources dedicated to the project. FTEs should not include contract resources.

New FTEs are not modifiable in Step 8. This data is automatically populated based on the new FTEs requested on the Cost Worksheet in Step 3. If the new FTEs assigned to the project are not correct, go back to Step 3 to correct the information.

The ***Back*** button will traverse backwards to Step 7. The ***Next*** button will take you to Step 9.

Step 9: Upload Supporting Documentation

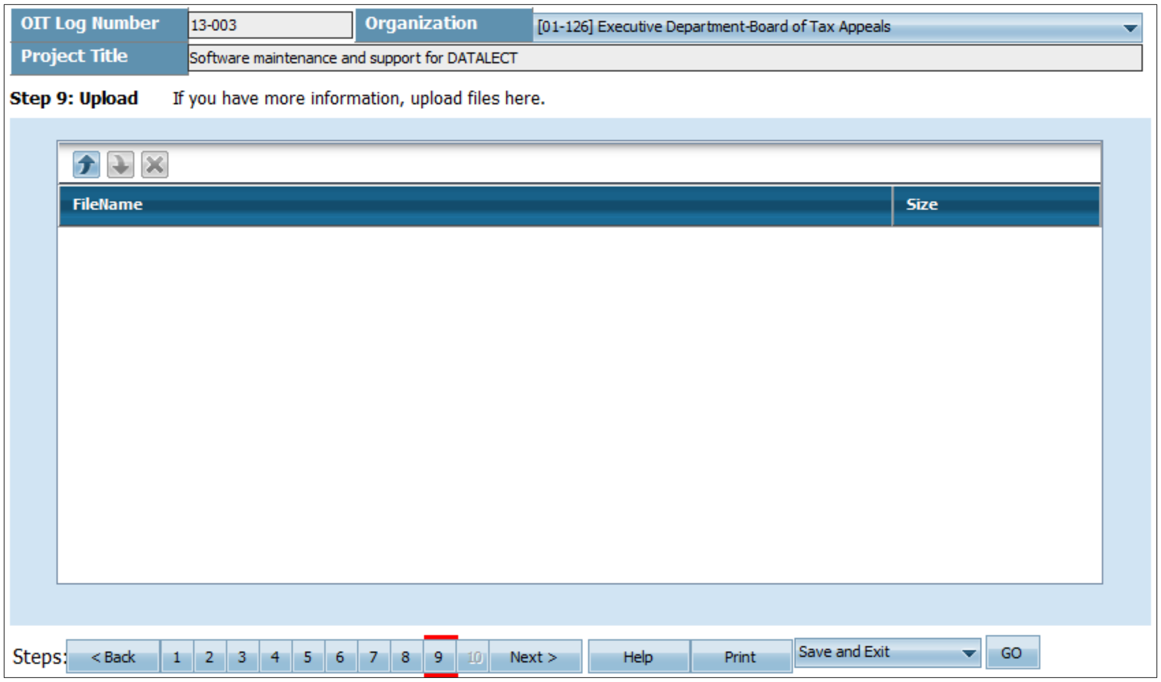


Figure 22: Step 9 Upload Supporting Documentation

Step 9 lists all supporting documentation previously uploaded and provides a way to attach additional supporting documentation.

Press the ***Up Arrow*** button to store a new document in the list:

> Special characters are not allowed in the filename.
>
> Attachment size is limited to 4 MB. Attempting to upload a file greater than 4 MB will time out and be rejected. If necessary to provide supporting documentation to OIT that is between 4 – 15 MB, please email to the appropriate OIT analyst. Documents larger than 15 MB must be provided via FTP or hardcopy.

Press the ***Down Arrow*** button to view an item in the list.

Press the ***X*** button to delete a previously uploaded file.

The ***Back*** button will traverse backwards to Step 8. The ***Next*** button will go to Step 10.

Step 10: Submit for Review

The contents of the Step 10 screen will vary based on whether the IT Request is part of the Budget or Mid-Year process.

Estimated Start Date and ***Estimated Completion Date*** for the project are always required.

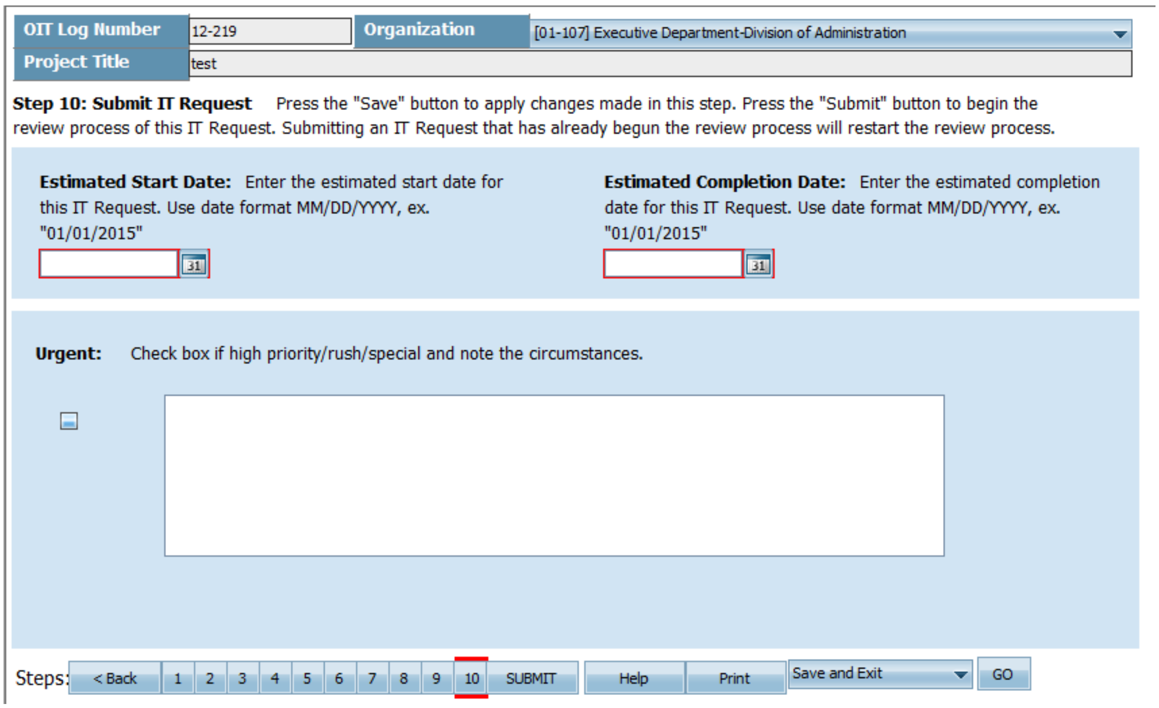


Figure 23: Step 10 Submit for Review (Mid-Year Request)

If the request is a Mid-Year IT Request, it can be marked as **Urgent** and text can be provided to document the urgency.

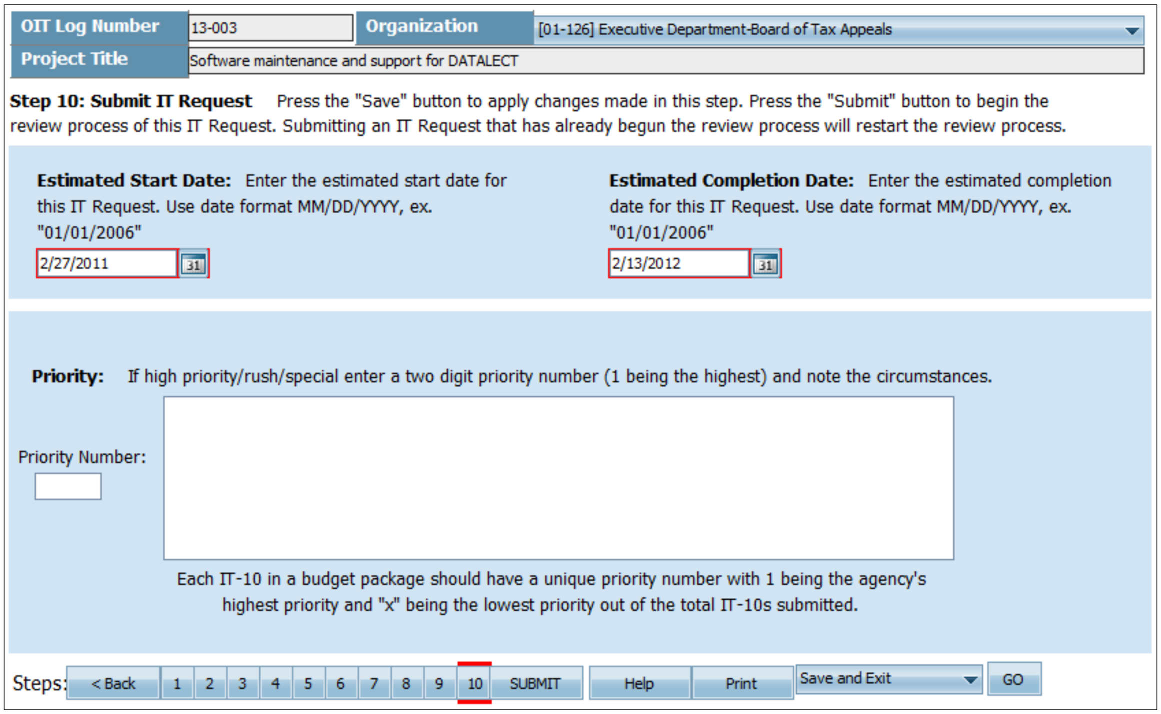


Figure 24: Step 10 Submit for Review (Budget Request)

If the request is a Budget IT Request, it is presumed that it is being submitted as part of a package of multiple IT requests. Therefore, priority information is requested. Each IT-10 in a budget package should have a unique priority number with 1 being the agency’s highest (most important) priority. A text box is provided to annotate the priority.

To route the IT-10 to OIT for review press ***SUBMIT***. Pressing the Save button at any point in the entry process does <u>not</u> submit it for OIT review.

IT Request Submission Confirmation

When an IT Request is submitted for approval, a confirmation page will display to verify that the request has been submitted successfully.

Once submitted, the assigned OIT Analyst will receive an email notification.

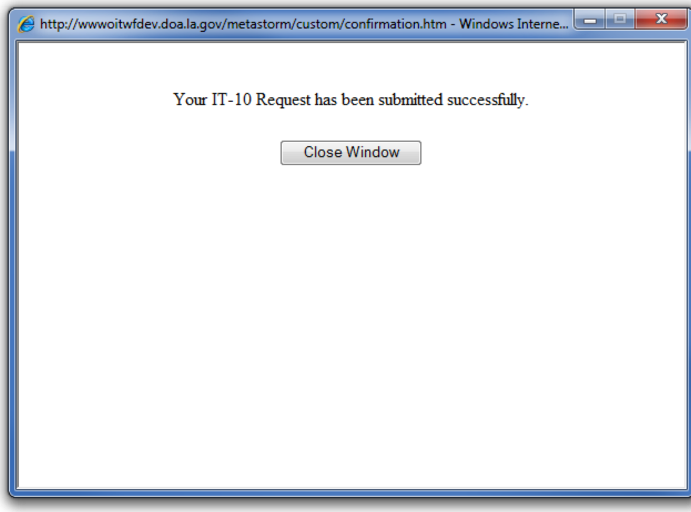


Figure 25: IT Request Submission Conformation

Request Review Process

At each review point in the workflow process, the person to whom a review is being routed will receive a notification email similar to the one in Figure 26.

Click on the ***Review Request*** link to go directly to the relevant request.

From: ITRequest@LA.GOV [mailto:ITRequest@LA.GOV]
Sent: Thursday, February 14, 2008 9:19 AM
To: Bobby Collins
Subject: IT Request 08-001 - Organization Budget Analyst Approval

IT Request Information

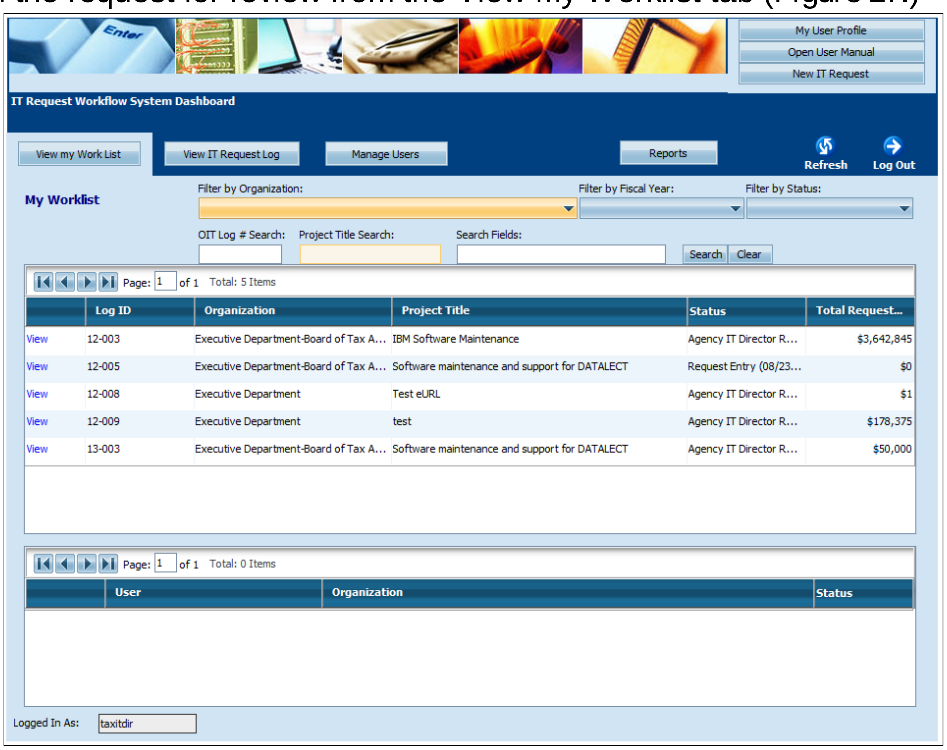
Organization: Department of Social Services-Office of the Secretary
Agency:
Project Title: OFS Customer Service Center
Amount: $7,105.00

Please review and approve the IT Request using the following link(s):

Review Request

Figure 26: Reviewer Email Notification

To review a request at any time, log into the workflow system and click on ***View*** to open the request for review from the View My Worklist tab (Figure 27.)



	Log ID	Organization	Project Title	Status	Total Request...
View	12-003	Executive Department-Board of Tax A...	IBM Software Maintenance	Agency IT Director R...	$3,642,845
View	12-005	Executive Department-Board of Tax A...	Software maintenance and support for DATALECT	Request Entry (08/23...	$0
View	12-008	Executive Department	Test eURL	Agency IT Director R...	$1
View	12-009	Executive Department	test	Agency IT Director R...	$178,375
View	13-003	Executive Department-Board of Tax A...	Software maintenance and support for DATALECT	Agency IT Director R...	$50,000

Figure 27: My Worklist

IT Director Review

Once an organization's designated Submitter completes and submits an IT Request, it will be routed to the primary IT Director. The IT Director will receive an email containing a link which will allow them to perform the review. Alternatively, the IT Director can logon to the workflow system to view all requests.

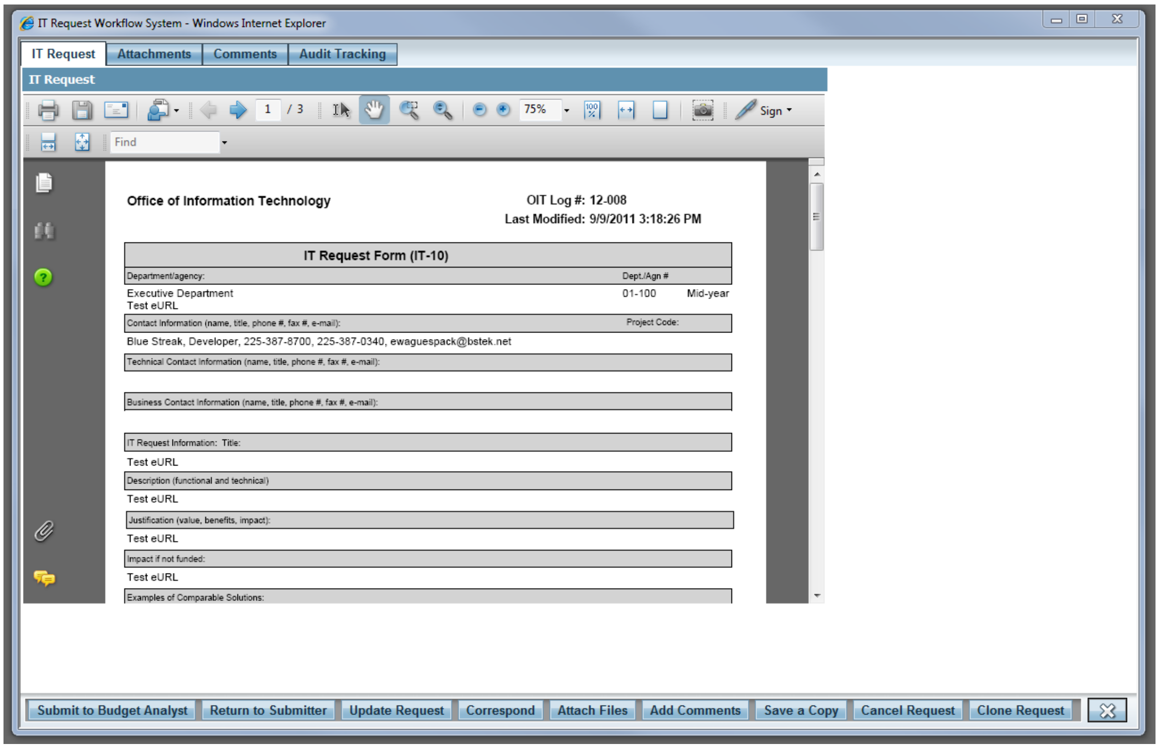


Figure 28: IT Director Review Form

The buttons at the bottom of IT Director Review screen allow the IT Director to:

- Approve the IT Request by selecting the ***Submit to Budget Analyst*** button. This will send a notification email to the Budget Analyst and direct the workflow to the Budget Analyst's Worklist for review.

- Reject the IT Request using the ***Return to Submitter*** button. This will send an email to the submitter, and direct the IT Request back to the submitter's Worklist to allow modifications.

- Modify the request by using the ***Update Request.***

- Correspond with any user in the system by selecting the ***Correspond*** button. Correspondences are stored as comments with the request.

- Attach supporting documentation to the file by selecting the ***Attach Files*** button.

- Add notes or comments by using the ***Add Comments*** button Comments can only be made while an IT Request is in a user's Worklist.

Other functions available via the tool bars and tabs on the reviewer screen include:

- ***Print*** a PDF copy of the IT Request.

- View stored ***Comments*** pertaining to the IT Request. A user can only view comments originating from their own department or, in the case of correspondence, sent to a user within their department.

- View ***Attachments*** that have been uploaded as part of the IT Request.

- View the ***Audit Tracking*** for the IT Request.

Budget Analyst Review

Once the IT Request has been approved by the IT Director it will be routed to the primary budget analyst. The primary budget analyst will receive an email containing a link which will allow them to perform their review. Alternatively, the Budget Analyst may logon to the system and view all their requests.

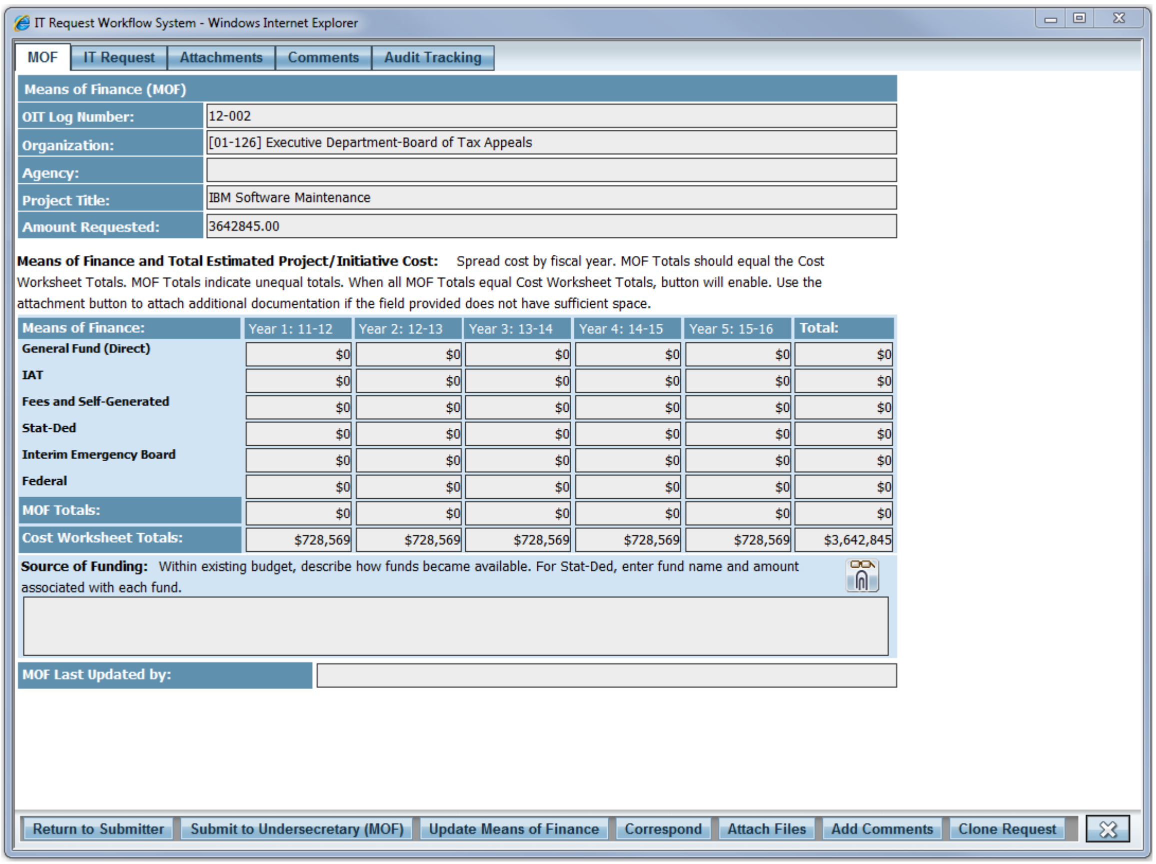


Figure 29: Budget Analyst Review Form

The budget analyst must update the ***Means of Finance*** (MOF) data before the review can be routed to the Undersecretary. On the MOF Screen, enter the dollar amounts associated with the IT Request broken out by the fiscal year in which the cost will be incurred. The ***Submit to Undersecretary*** button will be enabled only after the MOF totals balance with the data entered on the Cost Worksheet (IT Request Step 3.)

The Means of Finance screen allows the Budget Analyst to:

– Review all of the information relevant to the request by selecting the ***IT Request*** tab.

– Update and approve the IT Request by selecting the ***Submit to Undersecretary*** button. This sends an email to the Undersecretary and directs the IT Request to the Undersecretary's Worklist for review.

- Reject the IT Request using the ***Return to Submitter*** button. This sends an email to the submitter, and directs the IT Request back to the submitter to allow modifications of the IT Request.

- Correspond via email with any user in the system by selecting the ***Correspond*** button. Correspondences are stored as comments.

- Attach supporting documentation by selecting the ***Attach Files*** button.

- Add notes or comments by using the ***Add Comments*** button. Comments can only be made while an IT Request is in a user's Worklist.

Other functions available via the tool bars and tabs on the reviewer screen include:

  - ***Print*** a PDF copy of the IT Request.

  - View stored ***Comments*** pertaining to the IT Request. A user can only view comments originating from their own department or, in the case of correspondence, sent to a user within their department.

  - View ***Attachments*** that have been uploaded as part of the IT Request.

  - View the ***Audit Tracking*** for the IT Request.

Undersecretary Review

Once the IT Request has reviewed by the IT Director and the budget analyst, and the Means of Finance data has been completed, the IT Request will be routed to the primary Undersecretary. The Undersecretary will receive an email containing a link which will allow them to perform the review. Alternatively, the Undersecretary may logon to the system and view all their requests.

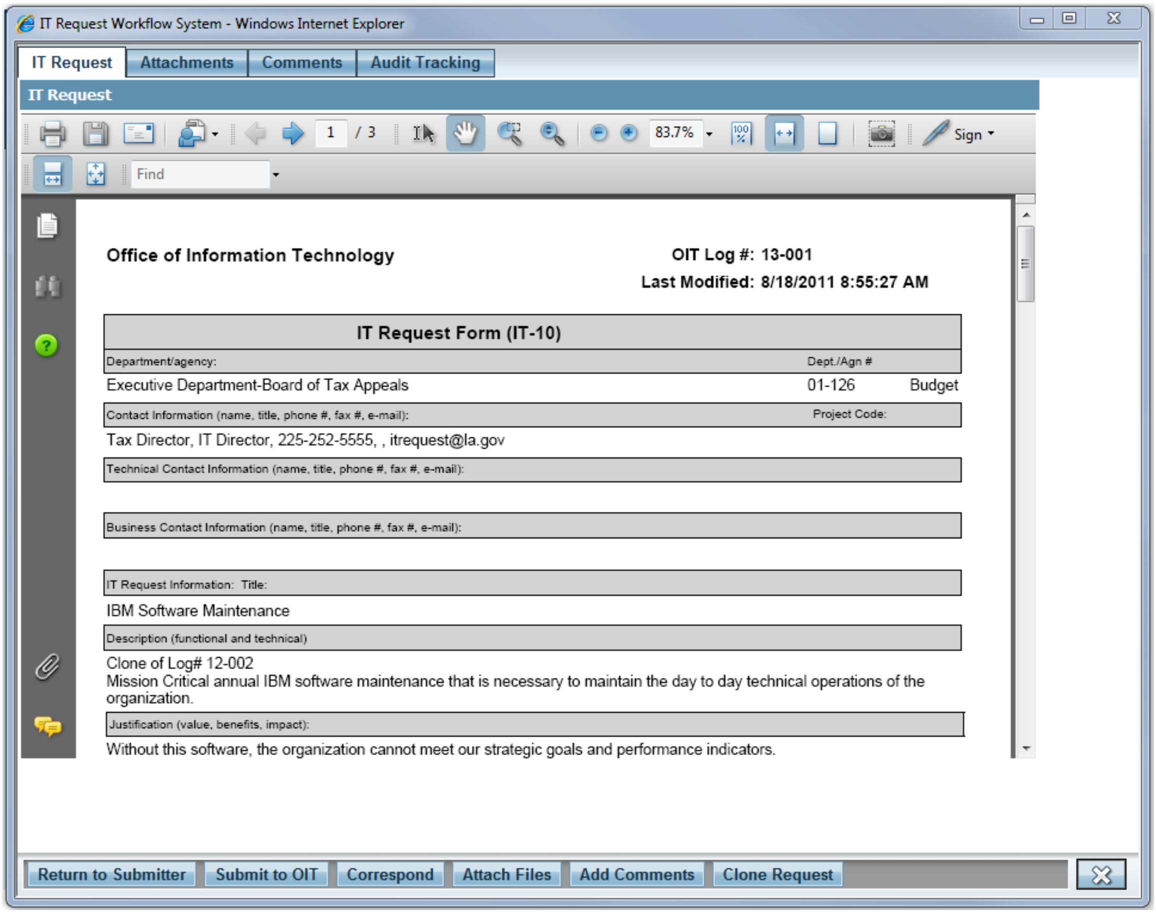


Figure 30: Undersecretary Role Review Form

The IT Request Review form allows the Undersecretary to:

- Approve the request and forward it to OIT by selecting the ***Submit to OIT*** button. This sends an email to the OIT Analyst and directs the IT Request to the Analyst's Worklist for review.

- Reject the IT Request using the ***Return to Submitter*** button. This sends an email to the submitter, and directs the IT Request back to the submitter's Worklist to allow modifications.

- Correspond via email to any user via the **Correspond** button. Correspondences are captured as comments.

- Attach supporting documentation via the ***Attach Files*** Button.

- Add notes or comments by using the ***Add Comments*** button. Comments can only be made while an IT Request is in a user's Worklist.

Other functions available via the tool bars and tabs on the reviewer screen include:

- ***Print*** a PDF copy of the IT Request.

- View stored ***Comments*** pertaining to the IT Request. A user can only view comments originating from their own department or, in the case of correspondence, sent to a user within their department.

- View ***Attachments*** that have been uploaded as part of the IT Request.

- View the ***Audit Tracking*** for the IT Request.

OIT Analyst Review

Once the Undersecretary approves an IT Request, it is automatically routed to OIT for formal review. The OIT analyst assigned to the department will receive an email containing a ***Review*** link and the OIT analyst's Worklist will also reflect the new task.

The Technical Review screen allows the OIT Analyst to document their technical review of the IT Request. Certain data fields including project title, project description, impact if not funded, and risk fields are pre-filled based on information from the IT Request. The OIT Analyst has the ability to change this information within the technical review without affecting the IT Request as originally submitted.

The OIT Analyst may recommend a total cost that differs from what was submitted by the agency.

After reviewing the request, the OIT Analyst can choose to return the form to the submitter, forward to the budget office, or save the technical review.

The Save option (designated by a Check mark) provides the OIT Analyst the ability to save the information entered on the technical review without causing any workflow related actions to take place.

Both ***Return to Submitter*** and ***Not Supported*** will cause the IT Request to be returned to the submitter.

If an IT Request is submitted as part of a Budget request, the OIT Analyst receives the request from the Undersecretary, performs the technical review of the IT Request, and then submits the request to the OIT Supervisor. The OIT Supervisor makes a recommendation and submits it to the CIO, who forwards the IT Request to the Budget Office. The Budget Office typically provides all recommendations after the state budget has been enacted at the end of June. Once the Budget Office notes their recommendations, IT-10s are returned from OPB to each OIT Analyst, at which point the OIT Analyst can make one of three recommendations: ***Agree, Disagree, or Reject.***

The ***Agree*** option means the OIT Analyst agrees with the OPB recommendation as either approved or denied. The ***Disagree*** option allows the OIT Analyst to send the IT Request back to the Budget Office for further discussion. The ***Reject*** option sends the IT Request back to the submitter at the agency.

If an IT Request is submitted as a Mid-Year Request, the OIT Analyst obtains OPB approval before submitting to the OIT Supervisor.

DOA/OPB Analyst Review

Each IT Request must be reviewed by the Budget Office (OPB) in order to validate that sufficient funding for an IT Request exists within the department's budget.

The Budget Office Analyst must enter the ***Initial Year Amount Recommended***, the ***Total Amount***, and ***Initial Year Amount Enacted***. The Budget Office Analyst can indicate that funding is available, available pending BA-7 approval, or that funding cannot be validated.

OPB review is completed by pressing the ***Submit OIT*** or ***Not Funded*** button. Successful submission will cause an alert message to appear, thanking the user for their review of the IT Request.

The following functions are also available to Budget Office reviewer:

- View the IT Request using the IT Request tab. The ***Correspond*** button may be used to correspond with any user that exists within the system. Correspondence is captured as a comment.
- The ***Attach Files*** Button may be used to attach supporting documentation.
- Comments may be entered using the ***Add Comments*** button at the bottom of the Review form. Comments can only be made while an IT Request is within the user's Worklist.
- ***Print*** a PDF copy of the IT Request.
- View any ***Comments*** submitted pertaining to the IT Request. A user can only View comments originating from their own department or, in the case of correspondence, being sent to a user within their department.
- View ***Attachments*** that have been uploaded as part of the IT Request.
- View the ***Audit Tracking*** for the IT Request.

OIT Supervisor Review

Once the OIT analyst receives a response from the DOA budget analyst and completes their review of the IT Request, it is automatically routed to the OIT Supervisor for review. The OIT Supervisor will receive an email notification containing a ***Review*** link and the Supervisor's Worklist will also reflect the new task.

The Technical Review form allows the OIT Supervisor to perform the technical review of the IT Request. The OIT Supervisor has the ability to change this information within the technical review without affecting the IT Request as originally submitted.

The OIT Supervisor has the ability to recommend an IT Request amount that differs from what was submitted by the OIT analyst.

After making a recommendation the OIT Supervisor can choose to return the form to the OIT Analyst, forward to the CIO, or save the technical review. The ***Save*** option provides the OIT Analyst the ability to save the information entered on the technical review screen without causing any workflow-related actions to take place.

The ***Return to Submitter*** and ***Forward to CIO*** options appear based on the recommendation made by the OIT Supervisor.

A recommendation of ***Not Endorsed*** will cause the IT Request to be returned to the OIT analyst.

The following functions are also available from the Technical Review:

- View the IT Request via the log number link to the IT Request PDF.
- View comments via the Comment Listing link.
- Make comments by entering information into the Comments field when ***Forward to CIO***, ***Return to Submitter***, or ***Save*** is chosen.
- Correspond with any user that exists within the system.
- View any files that have been uploaded as part of the IT Request.

CIO Review

Once the OIT Supervisor has reviewed and supported an IT Request, it is automatically routed to the CIO for review. The CIO will receive an email containing a ***Review*** link and the CIO's Worklist will also reflect the new task.

The Technical Review form allows the CIO to perform the technical review of the IT Request.

The CIO has the ability to change information within the technical review without affecting the IT Request as originally submitted.

The CIO has the ability to recommend an IT Request amount that differs from what was submitted by the OIT Supervisor.

The CIO can update the Technical Review and submit review decisions of ***Supported*** or ***Not Supported***.

The following functions are also available from the Technical Review:

- View the IT Request via the log number link to the IT Request PDF.
- View comments via the Comment Listing link.
- Make comments by entering information into the Comments field when ***Not Supported*** or ***Supported.***
- Correspond with any user that exists within the system.
- View any files that have been uploaded as part of the IT Request.

Once a mid-year request is approved by the CIO, the submitter and all approvers are so informed via email. Mid-year requests and the resulting approvals are processed year-round.

Once a budget IT request is approved by the CIO, it is routed to OPB for consideration during state budget preparation. At such time as the OPB budget analyst makes a recommendation on a request, the budget IT request is routed to the originating OIT analyst for final action and agency notification. Budget IT requests are usually submitted by November each year, and final resolution and notification occurs in late June or early July, depending upon the budget process.

View IT Request Log

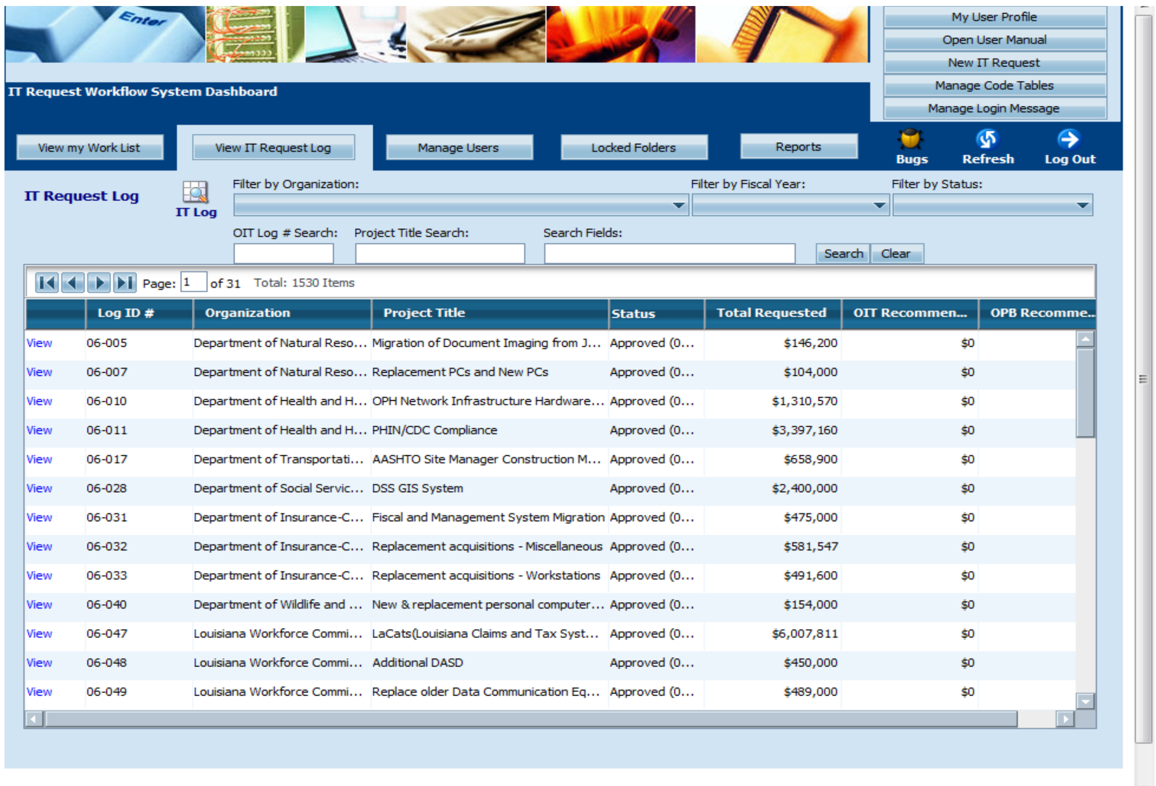


Figure 31: View IT Request Log Dashboard

To view a listing of IT Requests press the ***IT Request Log*** button.

Users are allowed access to IT Requests based upon their organization and role. Users with a role of IT Director, Agency Budget Analyst, or Undersecretary have access to the IT Requests for all organizations in which they have a defined role.

The contents of the IT Request Log screen can be adjusted by using filters. The Log may be filtered by ***Organization***, ***Fiscal Year***, and/or ***Status***. Choose the appropriate filter from the drop down list to apply the filter to the displayed log. To remove filters, click on the drop down arrow and select the blank field at the top of the drop down list.

To search for a specific Log number, project title, or text field, type the search criterion in the appropriate search field and click the ***Search*** button.

- ***OIT Log*** # search is an exact match on an IT Request log number.
- ***Project Title Search*** searches for words in the IT Request Title only.
- ***Search Fields*** searches on all text fields entered in Steps 1, 2, 4 and 5.

– To remove the search filter, use the ***Clear*** button.

IT Request Status Descriptions:

Request Entry - request is in process at the agency, not yet submitted to OIT for review.

Cancelled – request was cancelled.

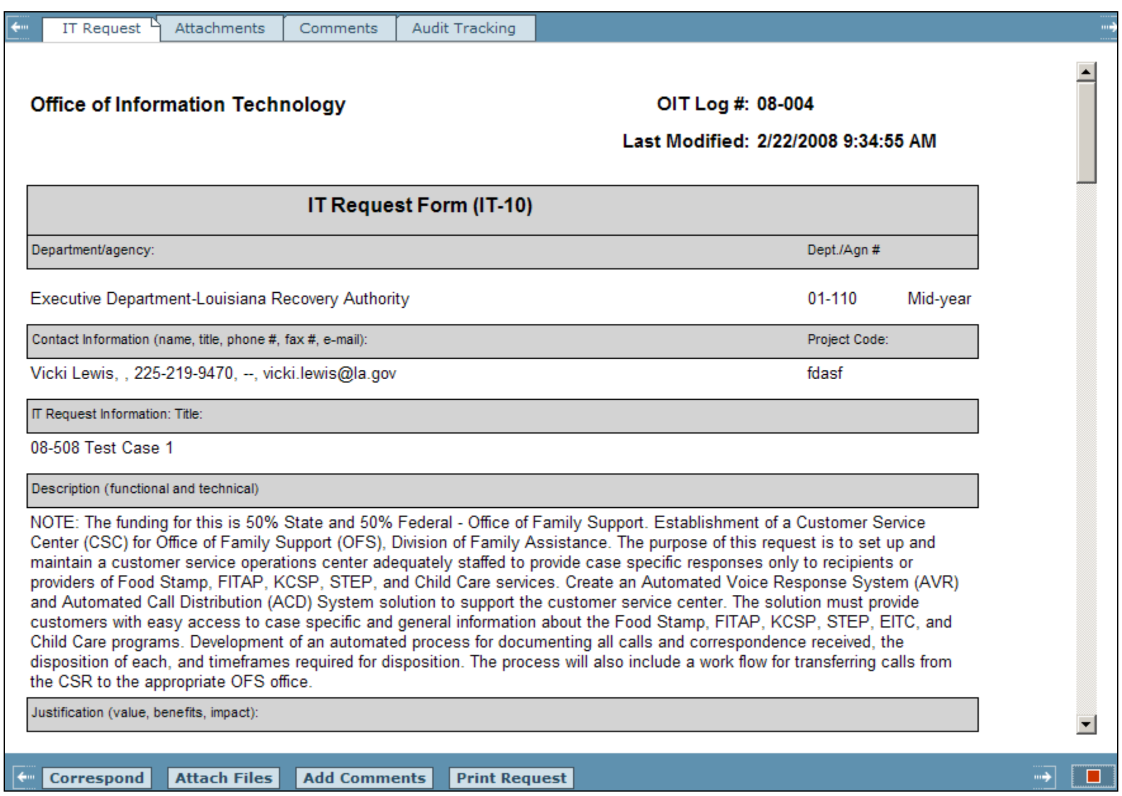
Approved – request has been through the entire approval process.

Request Expired – request was originally approved but was not acted upon within one year of the approval. Request is no longer considered approved and must be resubmitted if the agency wishes to act on it.

Enacted – request was submitted as a budget request, was supported by OIT and was approved and included in the enacted state budget.

Not Enacted – request was supported by OIT, but was not enacted in the budget and is therefore not considered approved.

To view the details of a specific IT Request, click on the ***View*** link for that request. Use the tabs at the top of the screen to see additional information.


IT Request | Attachments | Comments | Audit Tracking

Office of Information Technology

OIT Log #: 08-004

Last Modified: 2/22/2008 9:34:55 AM

IT Request Form (IT-10)

Department/agency: | Dept./Agn #

Executive Department-Louisiana Recovery Authority | 01-110 | Mid-year

Contact Information (name, title, phone #, fax #, e-mail): | Project Code:

Vicki Lewis, , 225-219-9470, --, vicki.lewis@la.gov | fdasf

IT Request Information: Title:

08-508 Test Case 1

Description (functional and technical)

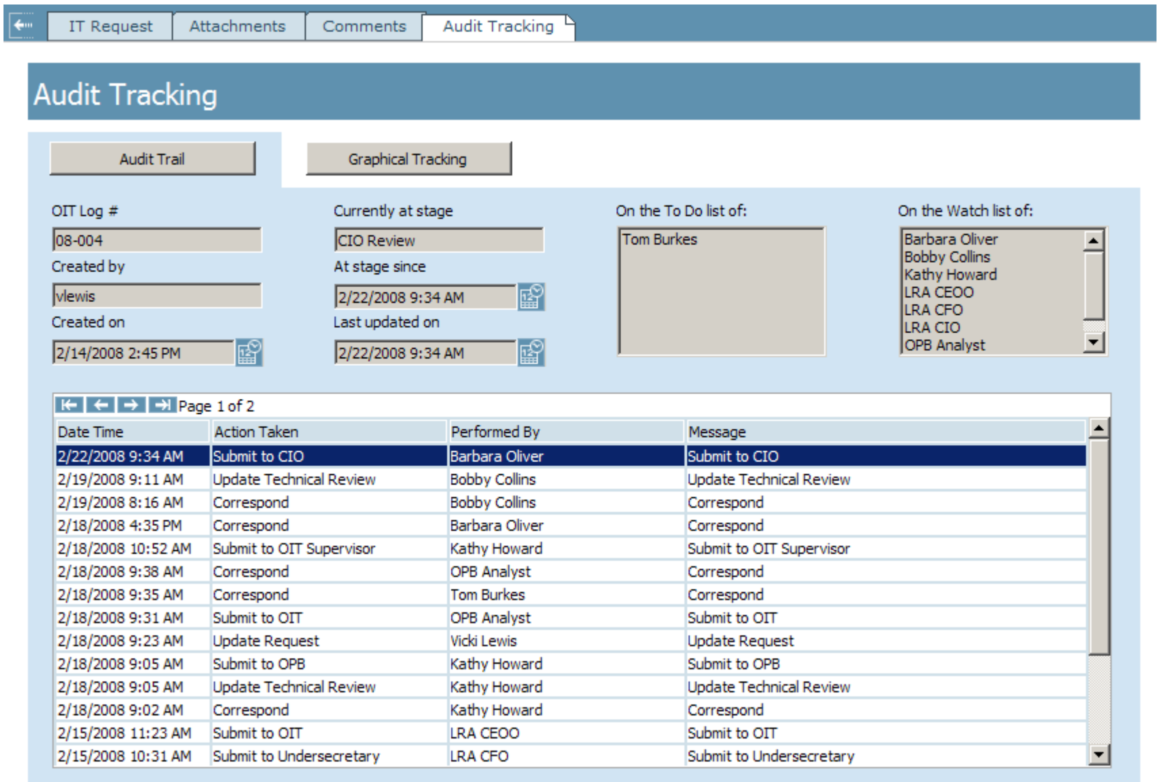
NOTE: The funding for this is 50% State and 50% Federal - Office of Family Support. Establishment of a Customer Service Center (CSC) for Office of Family Support (OFS), Division of Family Assistance. The purpose of this request is to set up and maintain a customer service operations center adequately staffed to provide case specific responses only to recipients or providers of Food Stamp, FITAP, KCSP, STEP, and Child Care services. Create an Automated Voice Response System (AVR) and Automated Call Distribution (ACD) System solution to support the customer service center. The solution must provide customers with easy access to case specific and general information about the Food Stamp, FITAP, KCSP, STEP, EITC, and Child Care programs. Development of an automated process for documenting all calls and correspondence received, the disposition of each, and timeframes required for disposition. The process will also include a work flow for transferring calls from the CSR to the appropriate OFS office.

Justification (value, benefits, impact):

Correspond | Attach Files | Add Comments | Print Request

IT Request Tracking

Click on the ***Audit Tracking*** tab to view the chronological sequence of activities related to the request.



IT Request | Attachments | Comments | Audit Tracking

Audit Tracking

Audit Trail | Graphical Tracking

OIT Log #: 08-004

Created by: vlewis

Created on: 2/14/2008 2:45 PM

Currently at stage: CIO Review

At stage since: 2/22/2008 9:34 AM

Last updated on: 2/22/2008 9:34 AM

On the To Do list of: Tom Burkes

On the Watch list of: Barbara Oliver, Bobby Collins, Kathy Howard, LRA CEOO, LRA CFO, LRA CIO, OPB Analyst

Page 1 of 2

Date Time	Action Taken	Performed By	Message
2/22/2008 9:34 AM	Submit to CIO	Barbara Oliver	Submit to CIO
2/19/2008 9:11 AM	Update Technical Review	Bobby Collins	Update Technical Review
2/19/2008 8:16 AM	Correspond	Bobby Collins	Correspond
2/18/2008 4:35 PM	Correspond	Barbara Oliver	Correspond
2/18/2008 10:52 AM	Submit to OIT Supervisor	Kathy Howard	Submit to OIT Supervisor
2/18/2008 9:38 AM	Correspond	OPB Analyst	Correspond
2/18/2008 9:35 AM	Correspond	Tom Burkes	Correspond
2/18/2008 9:31 AM	Submit to OIT	OPB Analyst	Submit to OIT
2/18/2008 9:23 AM	Update Request	Vicki Lewis	Update Request
2/18/2008 9:05 AM	Submit to OPB	Kathy Howard	Submit to OPB
2/18/2008 9:05 AM	Update Technical Review	Kathy Howard	Update Technical Review
2/18/2008 9:02 AM	Correspond	Kathy Howard	Correspond
2/15/2008 11:23 AM	Submit to OIT	LRA CEOO	Submit to OIT
2/15/2008 10:31 AM	Submit to Undersecretary	LRA CFO	Submit to Undersecretary

Figure 32: View IT Request Information

Click on the ***Graphical Tracking*** tab to see a pictorial representation of the workflow progress. The current status is displayed in blue.

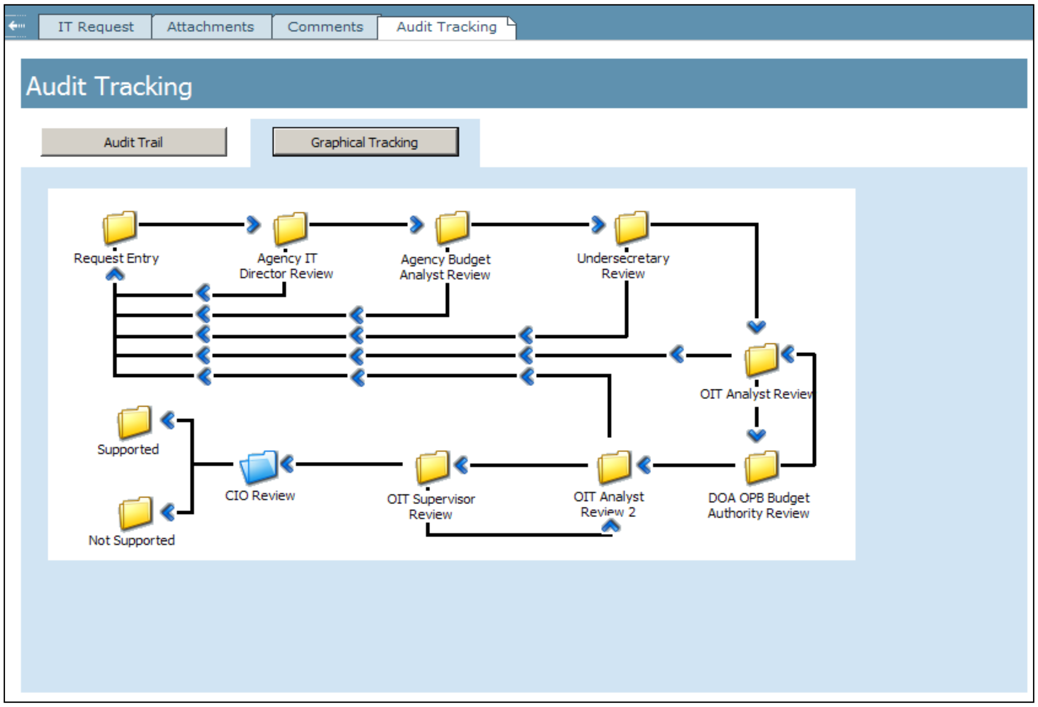


Figure 33: Graphical Tracking

Resubmit a Closed IT Request

An IT Request that has been ***Approved, Expired, Canceled, Not Enacted***, or ***Not Supported*** can be resubmitted for review by any user with Submitter or IT Director role for the Organization in which the IT Request was originally submitted. Use the View IT Request Log Screen to re-open the request.

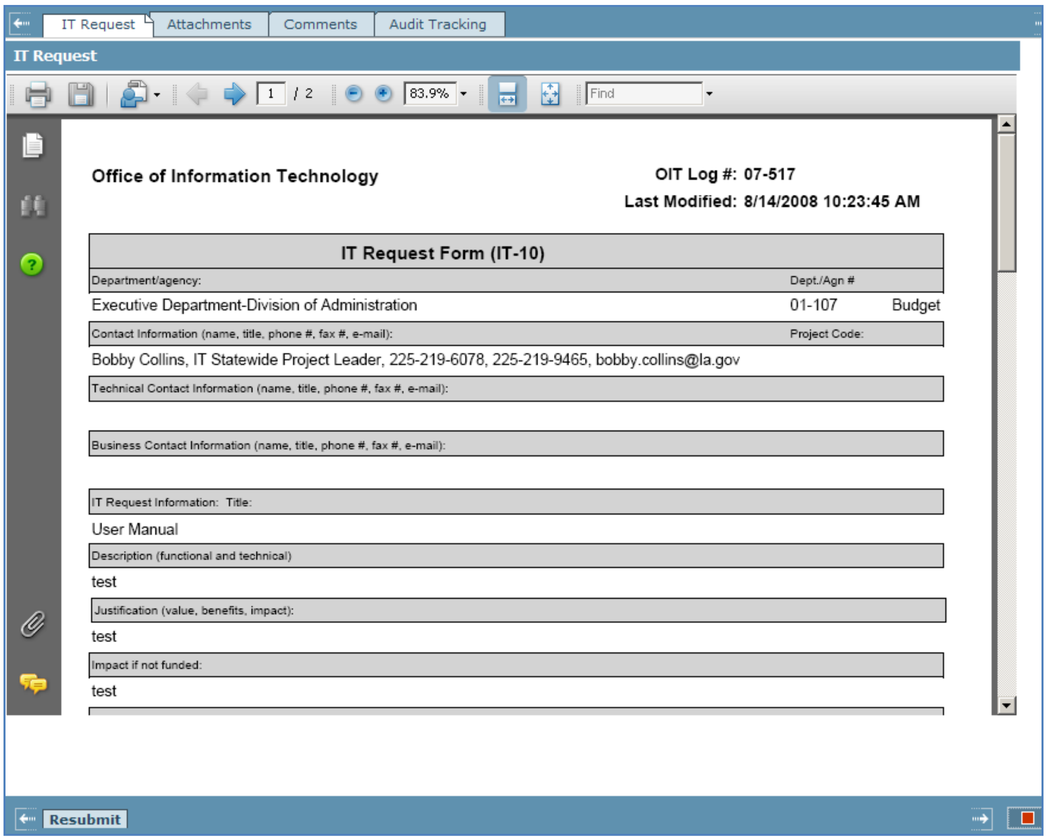


Figure 34: Resubmit Screen

Selecting the ***Resubmit*** button on this Screen will display Step 1 in Complete the IT Request Form Steps. All information from the original request will be displayed. Just as with a new IT Request, the Submitter will be expected to go through all 10 steps sequentially and then ***Submit.*** If the Resubmit button was selected in error, close the browser session on Step 1. The request's previous status will remain unchanged as long as you did not hit the ***Next*** button or one of the ***Save*** options.

Note: Resubmitting an IT Request from a previous fiscal year will generate a new IT Request Log Number and the reference to the original IT Request will be lost. To document the relationship, it is a good idea to make a note in the Comments.

Clone an IT Request

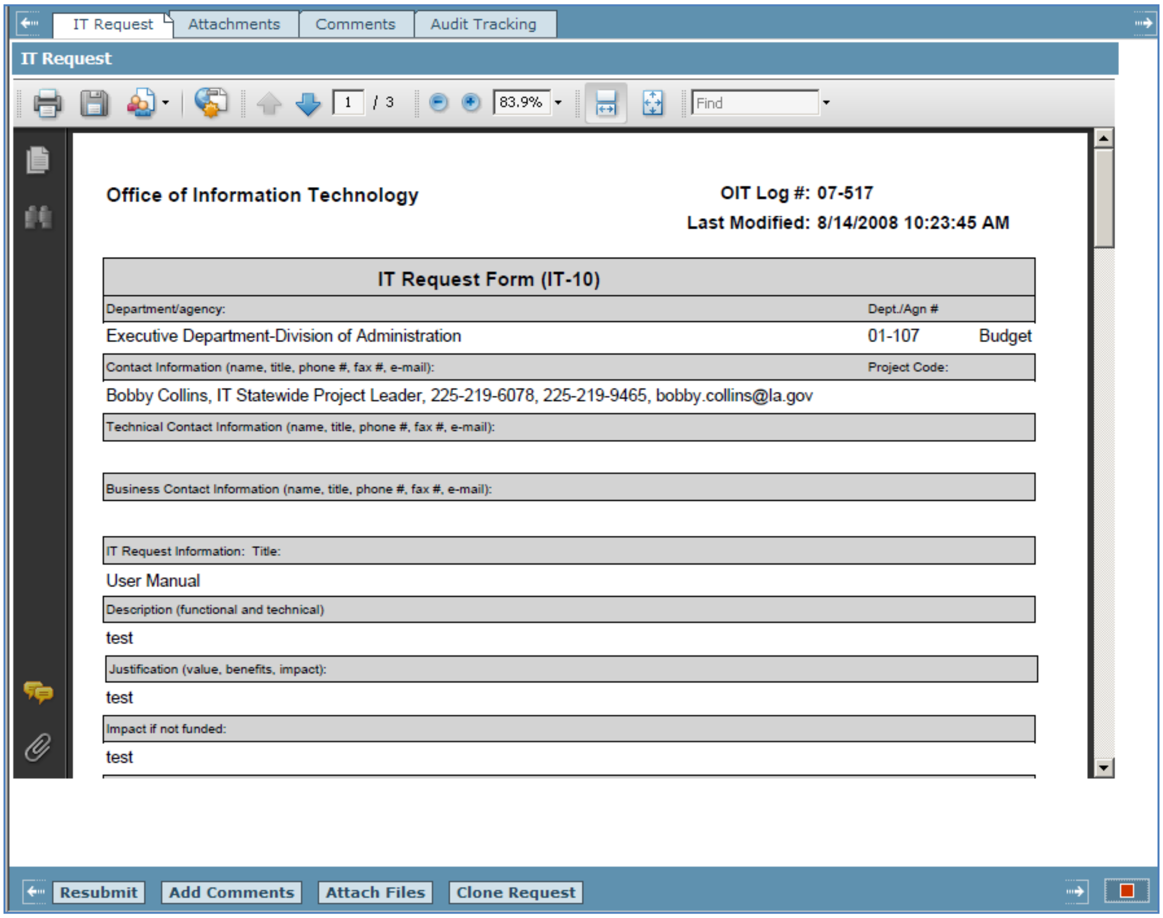
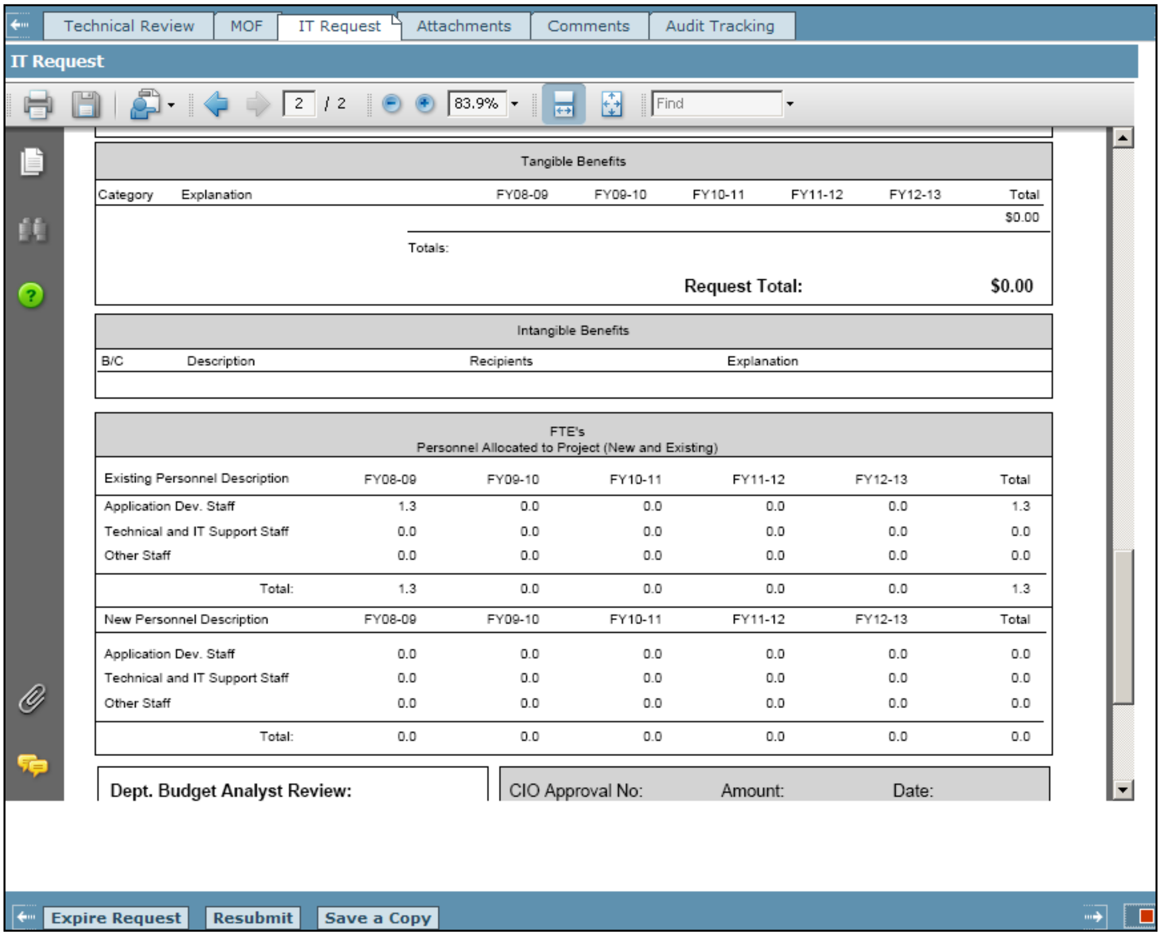


Figure 35: Clone an IT Request

An IT Request in any status may be cloned. With ***Clone Request*** you create an exact copy of an IT Request while leaving the original IT Request intact (unlike the resubmit function, which generates a new log number for the request). A cloned IT Request will always begin in Request Entry status and requires the completion of Steps 1 through 10 of the update process.

Expire an Approved IT Request



Tangible Benefits							
Category	Explanation	FY08-09	FY09-10	FY10-11	FY11-12	FY12-13	Total
							$0.00
	Totals:						
					Request Total:		$0.00

Intangible Benefits			
B/C	Description	Recipients	Explanation

FTE's Personnel Allocated to Project (New and Existing)						
Existing Personnel Description	FY08-09	FY09-10	FY10-11	FY11-12	FY12-13	Total
Application Dev. Staff	1.3	0.0	0.0	0.0	0.0	1.3
Technical and IT Support Staff	0.0	0.0	0.0	0.0	0.0	0.0
Other Staff	0.0	0.0	0.0	0.0	0.0	0.0
Total:	1.3	0.0	0.0	0.0	0.0	1.3
New Personnel Description	FY08-09	FY09-10	FY10-11	FY11-12	FY12-13	Total
Application Dev. Staff	0.0	0.0	0.0	0.0	0.0	0.0
Technical and IT Support Staff	0.0	0.0	0.0	0.0	0.0	0.0
Other Staff	0.0	0.0	0.0	0.0	0.0	0.0
Total:	0.0	0.0	0.0	0.0	0.0	0.0

Dept. Budget Analyst Review:

CIO Approval No: Amount: Date:

Figure 36: Expire Request

In accordance with OIT Guidelines, an approved IT Request may be expired if the project is not initiated within one year of approval. Both OIT and the IT Director have the authority to expire an IT Request.

After the ***Expire Request*** button is clicked, a confirmation window will appear. Selecting ***yes*** confirms the expiration of the request.

An expired request may be resubmitted for approval at a later date without the need to rekey the information.

Correspond

Correspond is a means of communicating via email with other system users about an IT Request. A correspondence can be sent by any registered user that has access to the IT Request. All correspondence is saved as comments within the system.

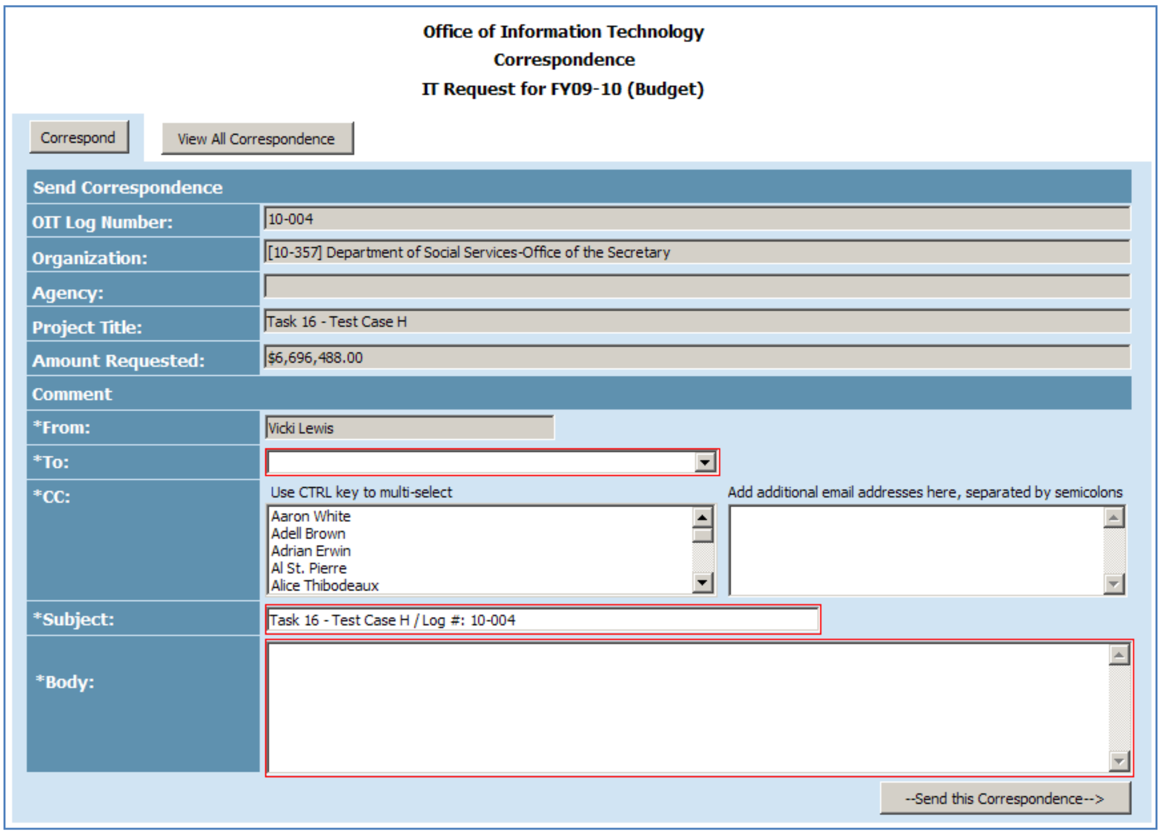


Figure 37: Correspondence

To correspond:

- Select a ***To*:** user from the drop-down list provided. This is a required field.
- ***CC:*** users are optional. To cc: more than one person, press and hold the CTRL key while clicking on each name. If the person's name is not in the list, type the email address in the box on the right.
- Enter/Edit the ***Subject*** line.
- Type the text of the message in the box marked ***Body***.
- Press the ***Send this Correspondence*** button.

A correspondence can be sent for any open IT Request but not for a request that has been ***Approved, Not Enacted,*** or ***Cancelled***.

Project Tracking

Note: This function is not currently operational.

In some cases, OIT may be required to track the status of an initiative after it has been approved. If so, an OIT Administrator may mark an IT Request as tracked and identify a Project Manager from the IT Request's Organization who will be responsible for entering and updating the milestones for the project. The Project Manager and OIT Analyst for the Organization will get email notifications that the IT Request has been selected as a tracked project and milestones need to be added.

Update Milestones

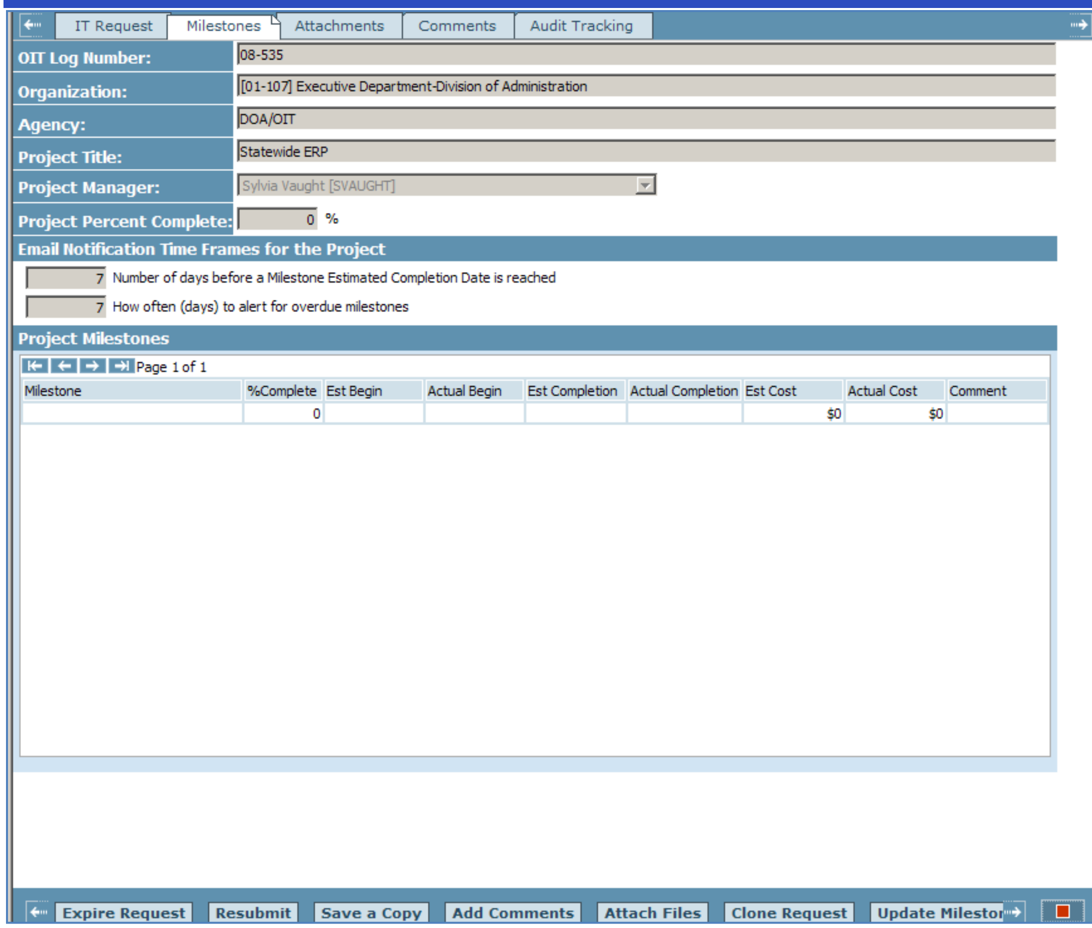


Figure 38: Update Project Milestones

The Project Manager is responsible for adding milestones and updating the status on a regular basis. Email notifications will be sent to the Project Manager as a reminder for approaching milestones and overdue milestones based on the intervals that are pertinent to the project.

Reports Dashboard

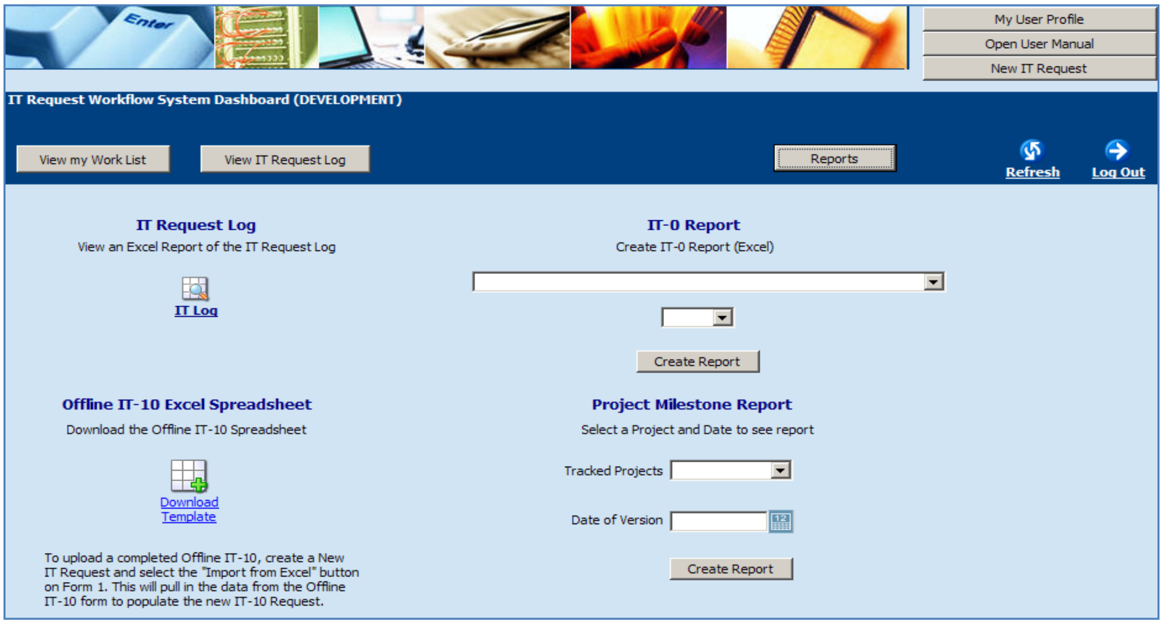


Figure 39: Reports Dashboard

The Reports Dashboard provides a list of four (4) report types:

- ***IT Request Log Report*** – This report creates an Excel spreadsheet which lists all IT Requests (regardless of status) for every organization the user has rights to see.

- ***IT-0 Report*** – This report creates an Excel spreadsheet for use as a starting point of an IT-0 Report that is required every year as part of the annual budget process. The report only shows data collected in the IT Request Workflow System and is not intended to be an all-inclusive IT-0. IT costs that were incurred but not reported via an IT-10 need to be manually added. (See also IT-0 Form info on the next page.)

- ***Offline IT-10 Excel Spreadsheet*** - This document is not a report but an IT-10 template for offline use. Organizations may download the template and email it among staff to gather information related to an IT Request, which can later be uploaded through Step 1 of the IT Request Update Process.

- ***Project Milestone Report*** – **This function is not currently operational.** This is a PDF report that is used to follow the status of projects that have been identified as a ***Tracked Project.***

IT-0 Form

The IT-0 Form is intended to collect summary cost data during budget preparation each fiscal year. It is designed to collect Prior Year, Current Year, and Requested Year dollars in various budget categories. The information is used as the basis for statewide statistical reports requested by outside parties, as well as for internal agency metrics analysis. Totals should include ALL IT expenditure, including data submitted via the IT-10 workflow system and data for initiatives which did not meet the criteria for submission of an IT-10. The form is an Excel spreadsheet with multiple Tabs. One IT-0 should be completed for each department by November 1 each year, or as instructed on the OIT web site. The completed form should be emailed to ITBudget@la.gov at the same time as the agency budget package is submitted to the DOA Office of Planning and Budget.

Assistance

OIT has assigned OIT analysts to assist each agency with use of the system. Agencies may contact their OIT Analyst for an overview and demonstration of the IT Request Workflow System, or to request assistance with the IT request process.

Other documentation available on the OIT web site includes:

- A Sample Completed IT Request
- Object Codes List
- IT Strategic Plan Template
- Sample Organization Chart

While every effort has been made to develop this manual and this workflow system for ease of use, if you encounter problems or have suggestions for improvement, please contact OIT at 225-219-9740.