

User Manual

For OCIO Administrators and Dashboard
Contributing Users

Washington State Information Technology
(IT) Project Dashboard

June 22, 2021

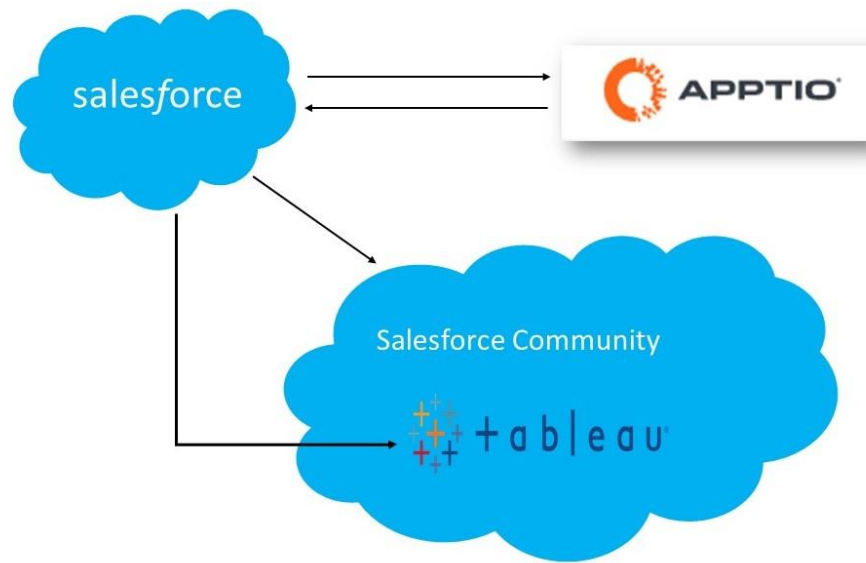
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Technology Overview

The Washington State Information Technology (IT) Project Dashboard utilizes several technologies in order to display the dashboard to the public. The diagram below demonstrates these different technologies.



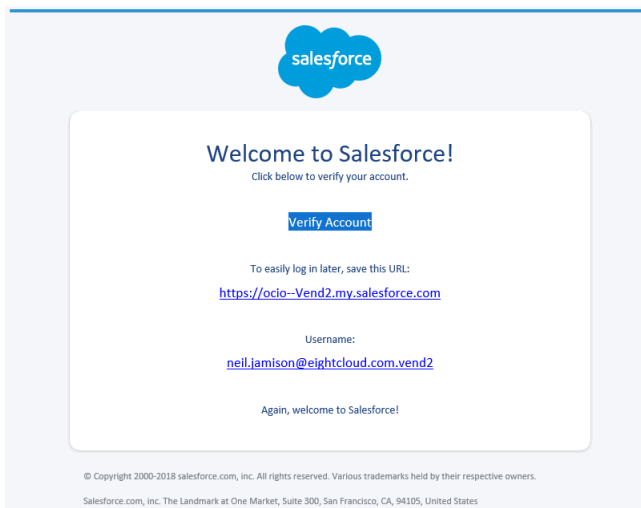
1. All data is entered into and stored in the Salesforce database. The public does not have access to the Salesforce database. Only users who have been granted a login to Salesforce can log in and enter data.
2. Salesforce and Apptio are integrated to send information about projects to Apptio and pull financial information back from Apptio into Salesforce.
3. Salesforce has a technology called Salesforce Communities that is built on top of the their platform. This technology is used to display information to external/public users.
 - The Salesforce Community gets its data from Salesforce.
 - The Salesforce Community also houses the Tableau dashboard.
 - The Salesforce Community is publicly available.
4. Tableau is a dashboard technology.
 - The data for displaying on the dashboard comes from Salesforce and is regularly loaded into the Dashboard for display.
 - The dashboard is housed on the Salesforce Community.
 - The Tableau Dashboard is also publicly available.

Logging into Salesforce

Salesforce is the location where all data is entered. The public does not have access to Salesforce directly. The public can only access the data displayed through the community and the Tableau Dashboard. Users who have been granted a login to Salesforce can log in to the system using the following process.

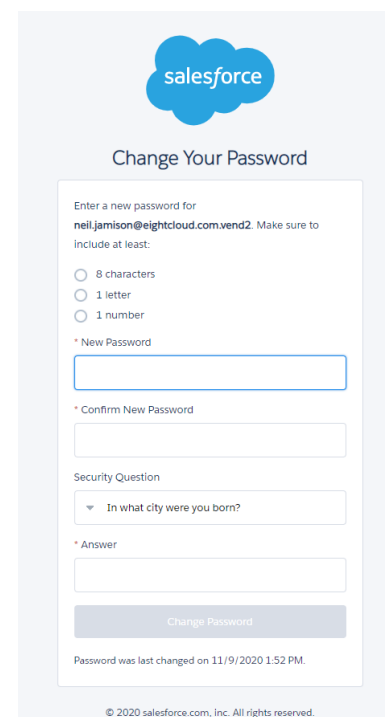
First time login

1. On first login, an administrator will send an email to the user through the Salesforce software to verify your account. The email will look like this:



2. Click **Verify Account**.
3. Create your password and security question and click **Change Password**.

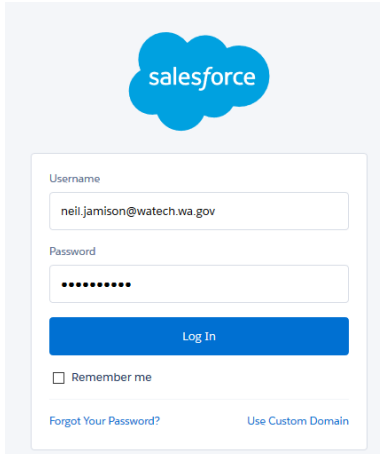
NOTE: If you are unable to reach this screen or receive a message that the link has expired or already been used, please contact the Salesforce administrator that set up your account to receive a new reset password link.



The screenshot shows the "Change Your Password" form in Salesforce. At the top is the Salesforce logo. Below it, the text reads "Change Your Password". The form asks to "Enter a new password for neil.jamison@eightcloud.com.vend2. Make sure to include at least:" followed by three radio button options: "8 characters", "1 letter", and "1 number". There are three required input fields: "* New Password", "* Confirm New Password", and "Security Question". The security question dropdown is set to "In what city were you born?". Below that is an "Answer" input field. A "Change Password" button is at the bottom. At the very bottom, it says "Password was last changed on 11/9/2020 1:52 PM." and "© 2020 salesforce.com, inc. All rights reserved."

Subsequent logins

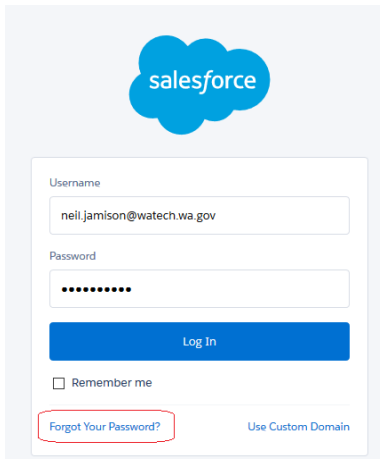
1. Go to this website for subsequent logins: waocio.my.salesforce.com.



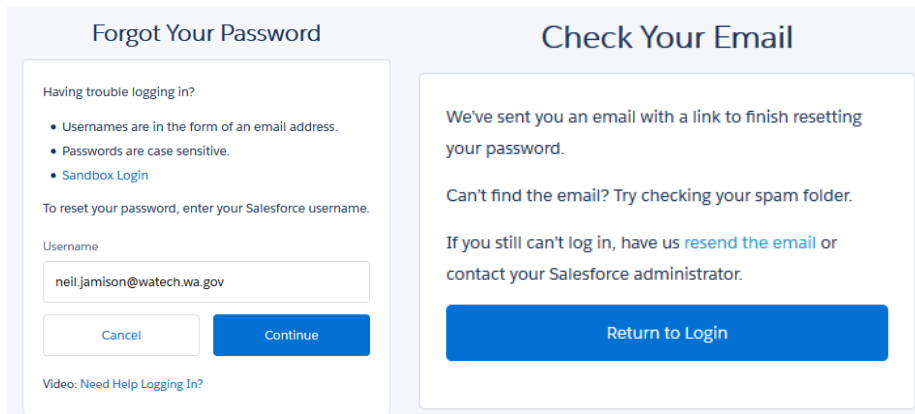
2. Enter your username and password, then click **Log In** to complete the process.

Forgot your password?

1. Navigate to the login screen: waocio.my.salesforce.com.
2. Click the **Forgot Your Password?** link.

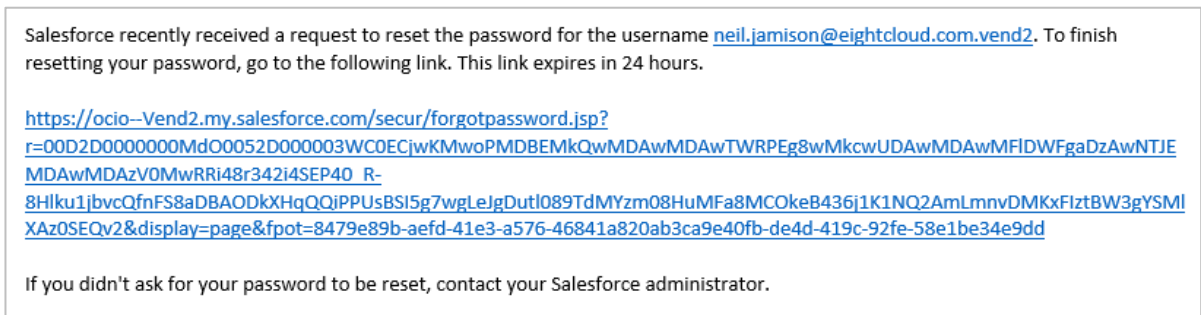


3. Enter your username and click continue.



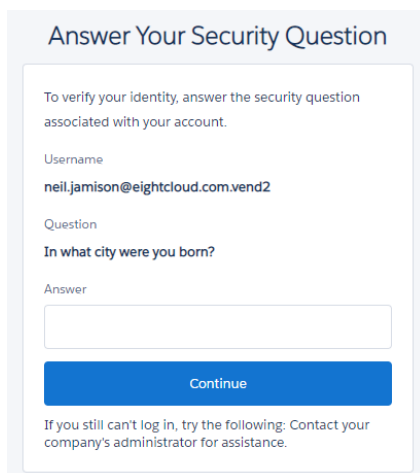
The screenshot shows two side-by-side panels. The left panel is titled "Forgot Your Password" and contains instructions for logging in, a list of tips (Usernames are in the form of an email address, Passwords are case sensitive, Sandbox Login), a field for the Salesforce username (neil.jamison@watech.wa.gov), and "Cancel" and "Continue" buttons. The right panel is titled "Check Your Email" and contains instructions about the email link, a "Return to Login" button, and a "resend the email" link.

4. You will receive an email with instructions to reset your password. The email will look like this:



The screenshot shows an email body with the following text: "Salesforce recently received a request to reset the password for the username neil.jamison@eightcloud.com.vend2. To finish resetting your password, go to the following link. This link expires in 24 hours." Below this is a long URL: https://ocio--Vend2.my.salesforce.com/secure/forgotpassword.jsp?r=00D2D0000000MdO0052D000003WC0ECjwKMwoPMDbEMkQwMDAwMDAwTWRPEg8wMkcwUDAwMDAwMFDWFgaDzAwNTJEMDAwMDAzVOMwRRi48r342i4SEP40_R-8Hlku1jbvcQfnFS8aDBAODkXHqQQiPPUsBSi5g7wgLeJgDutl089TdmYzm08HuMFa8MCOkeB436j1K1NQ2AmLmnvDMKxFztBW3gYSMLXAz0SEQv2&display=page&fpot=8479e89b-aefd-41e3-a576-46841a820ab3ca9e40fb-de4d-419c-92fe-58e1be34e9dd. At the bottom, it says "If you didn't ask for your password to be reset, contact your Salesforce administrator."

5. Verify your identity by answering your security question.



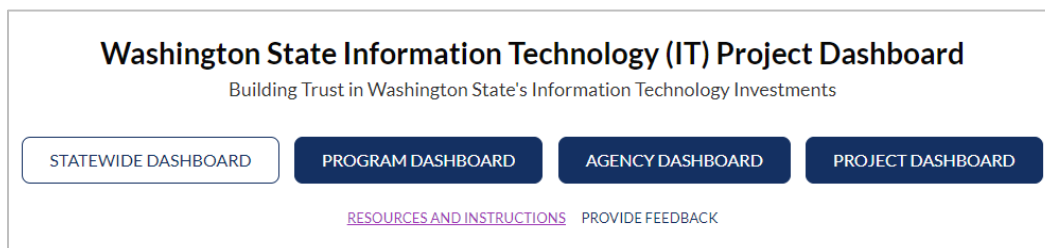
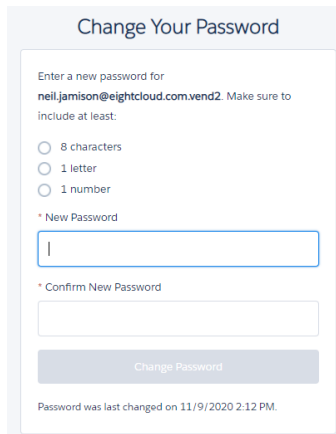
The screenshot shows a form titled "Answer Your Security Question". It contains instructions to verify identity, a field for the username (neil.jamison@eightcloud.com.vend2), a question "In what city were you born?", and an empty answer field. There is a "Continue" button and a note at the bottom: "If you still can't log in, try the following: Contact your company's administrator for assistance."

6. Enter a new password. Note: If you run into issues while attempting to complete this process contact your system administrator.

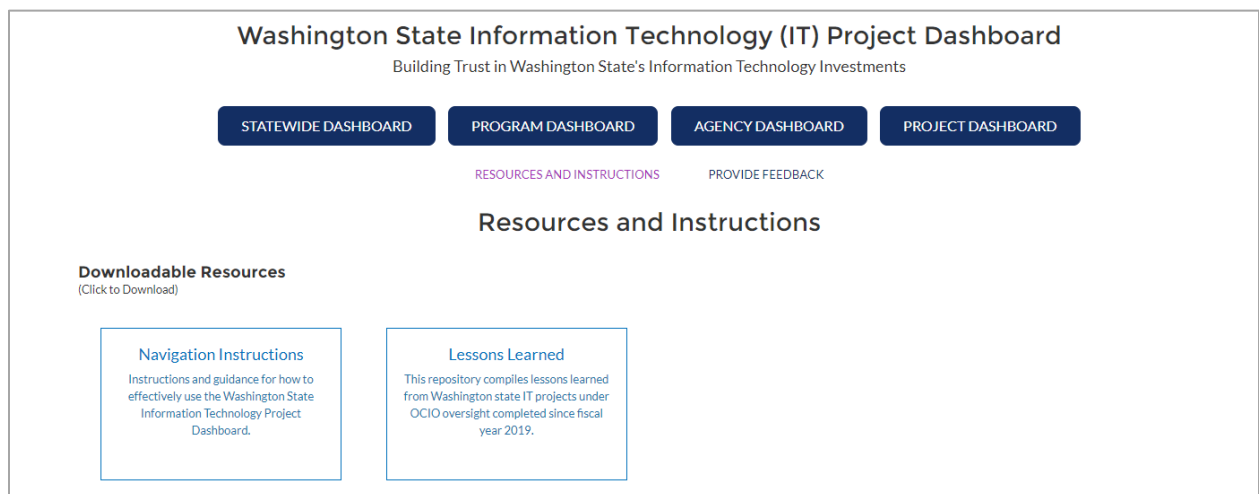
Finding Instructions and Resources

Instructions and resources available on the dashboard

1. Instructions and resources are available on the dashboard site: waciportal.force.com/s/.
2. Click on the **Resources and Instructions** link.




3. On this page, the following instructions and resources are accessible.



- **Navigation Instructions.** Instructions and guidance for how to effectively navigate the Washington State Information Technology Project Dashboard.
 - **Lessons Learned.** This repository compiles lessons learned from Washington State IT projects under OCIO oversight completed since fiscal year 2019.
4. Additionally, an interactive glossary can be found on the page.

Glossary
 Instructions:
 • For longer definitions click the Glossary Entry value to see the full definition
 • Use the Search box on the right to search for a specific term
 • Filter to types of definitions using the drop down menu at the top left

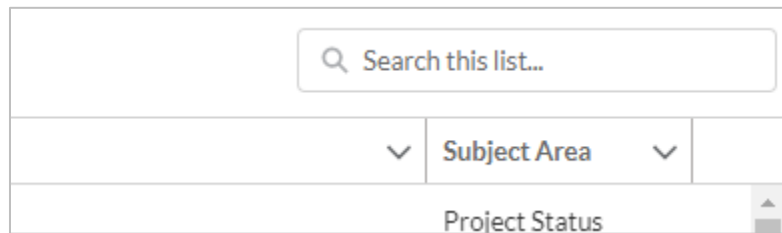
 All ▾

50+ items • Sorted by Glossary Entry • Filtered by All glossary

Search this list...

Glossary Entry ↑	Definition	Subject Area
1 Active	Project activities have started and are in progress.	Project Status
2 Administrative/Financial Approval	Approval from OFM and OCIO for an agency project that includes an administrative and/or financial system. An administrative and/or financial system is one where the primary purpose is to provide one of the following business functions: general ledger, accounts receivable, budget, human resource or payroll. Systems that merely store information, provide business intelligence...	Document Type
3 Agency	A Washington state office, board, commission, department, state institution or state institution of higher education.	

- a. Use the **Search this list...** box to search for a specific term.

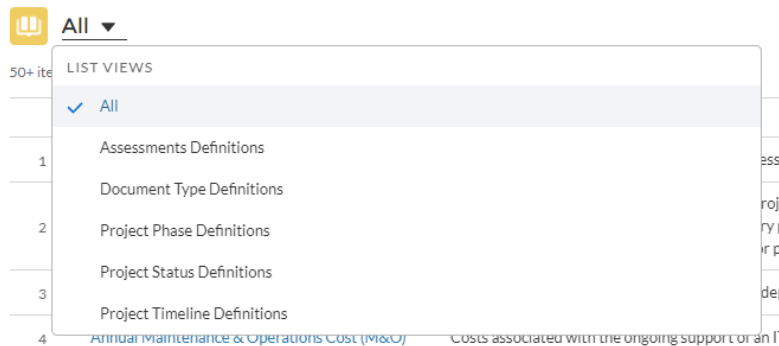



Search this list...

Subject Area

Project Status

- b. Use the list menu next to **All** to filter to just certain types of definitions.



 All ▾

50+ items

LIST VIEWS

- ✓ All
- Assessments Definitions
- Document Type Definitions
- Project Phase Definitions
- Project Status Definitions
- Project Timeline Definitions
- Annual Maintenance & Operations Cost (M&O) Costs associated with the ongoing support of an IT

- c. For particularly long definitions click on the **Definition name** to see the full definition.

2	Administrative/Financial Approval	Approval from OFM and OCIO for an agency project that includes an administrative and/or financial system. An administrative and/or financial system is one where the primary purpose is to provide one of the following business functions: general ledger, accounts receivable, budget, human resource or payroll. Systems that merely store information, provide business intelligence...	Document Type
---	---	---	---------------

Glossary Entry Administrative/Financial Approval
Definition Approval from OFM and OCIO for an agency project that includes an administrative and/or financial system. An administrative and/or financial system is one where the primary purpose is to provide one of the following business functions: general ledger, accounts receivable, budget, human resource or payroll. Systems that merely store information, provide business intelligence based on exports from administrative and/or financial systems or enable administrative and/or financial systems do not qualify as administrative and/or financial systems.

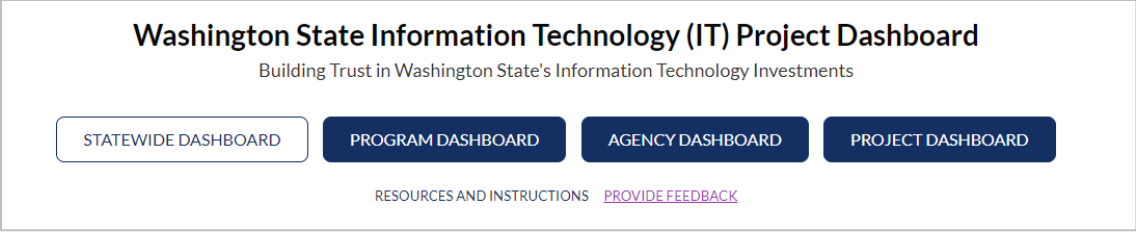
Additional resources

Additional resources can be found on the [IT Project Dashboard Resources](#) page on the OCIO website These include:

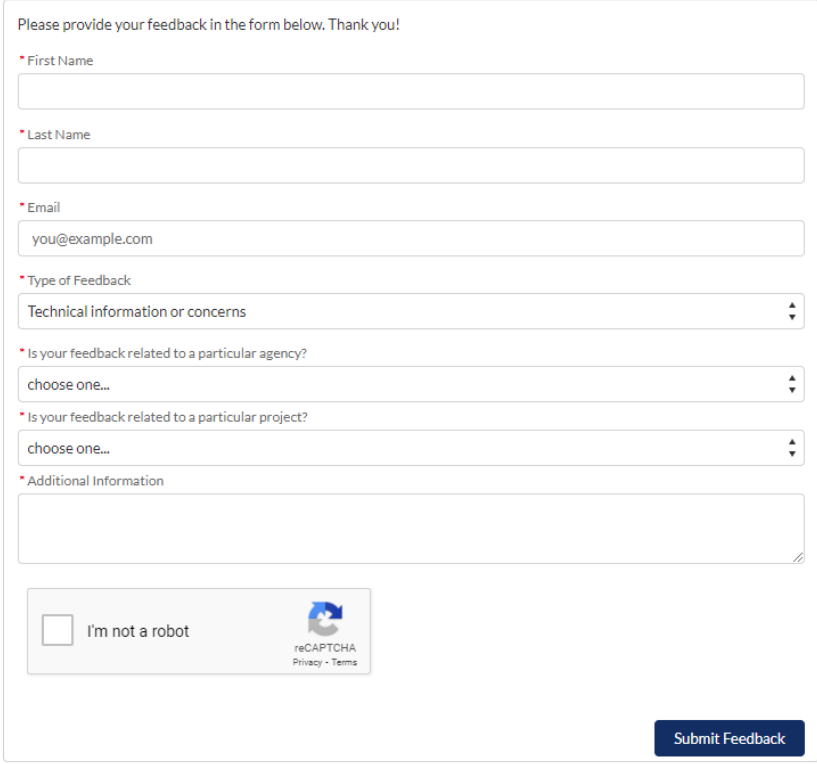
- [New users tip sheet.](#)
- [What's changed? Summary.](#)
- [Frequently asked questions \(FAQ\).](#)
- [Dashboard demonstration live recording.](#)
- [Dashboard training for agency project managers live recording.](#)
- [Dashboard training for agency project managers live recording.](#)

Submitting Questions and Feedback

1. Navigate to the dashboard site: waciportal.force.com/s/.
2. Click on the **Feedback** link.



3. Complete the feedback form and click on **Submit Feedback**.

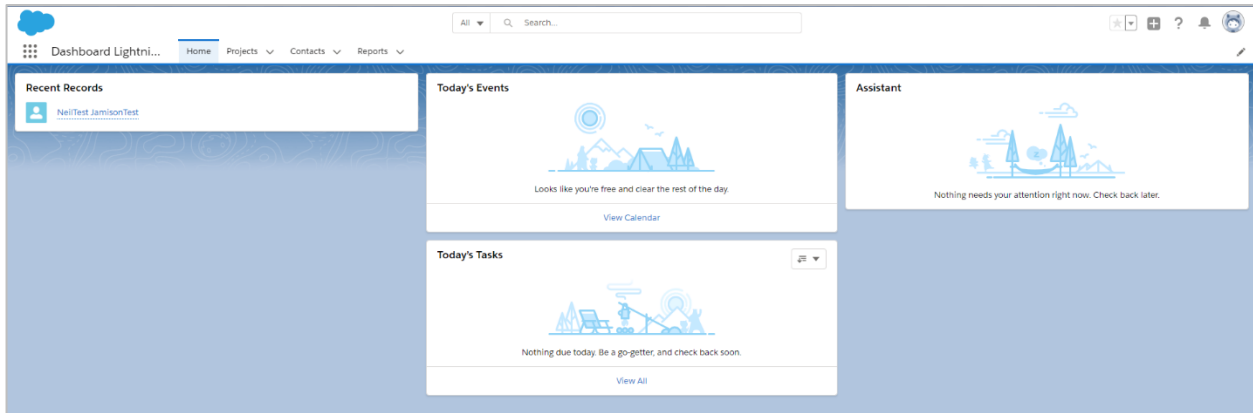


4. Feedback will be submitted to, and responses will come from:
 - Project information or questions: OCIOConsultants@ocio.wa.gov.
 - Technical information or concerns: OCIOTBMProgramOffice@ocio.wa.gov.
 - Other or both: OCIOConsultants@ocio.wa.gov and OCIOTBMProgramOffice@ocio.wa.gov.

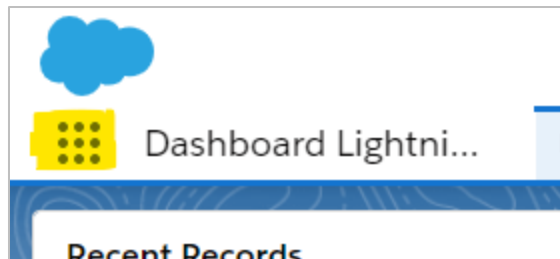
The information is also stored in Salesforce in the Feedback object accessible by System Administrators.

Finding Project Data and Information

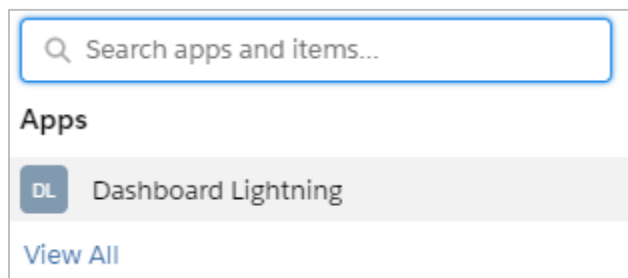
1. Upon first logging into the system the Home Screen will display.



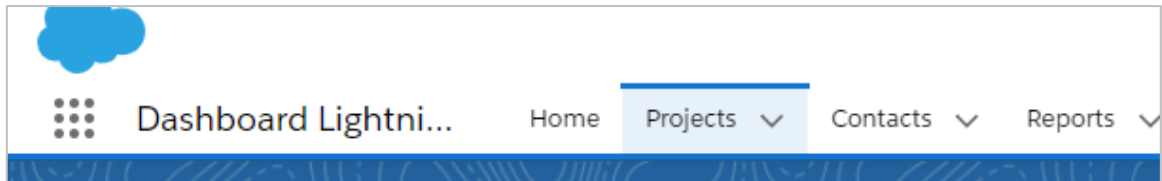
2. Dashboard Lightning will be indicated in the upper left.
 - a. If not, click on the non-dot waffle icon just beneath the cloud logo.



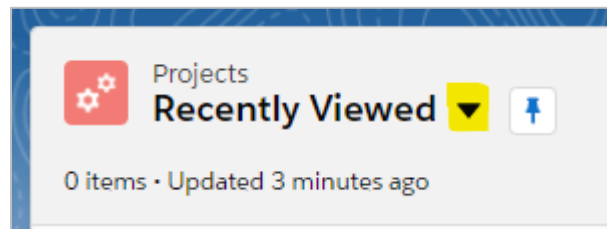
- b. Select **Dashboard Lightning** from the drop-down menu.



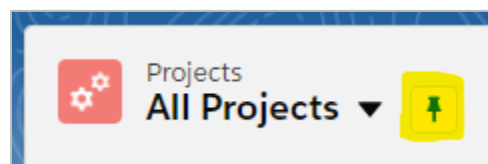
3. Across the top is the menu of available tabs. To access project information, click on the Projects tab.



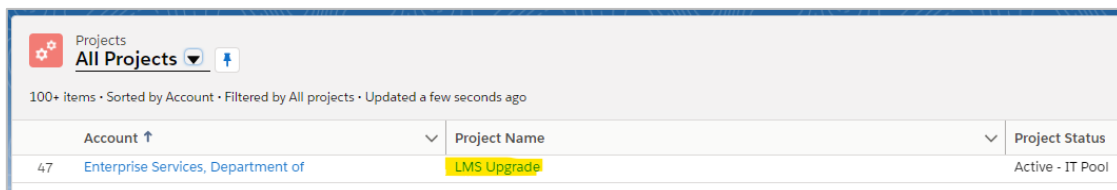
4. Select a list view to pin as the default view. This is a personal choice so each user can pin a different list view.
 - a. Click the “V” list icon to the right of **Project and Recently Viewed** on the left.



- b. Select **All Projects** and click the pin icon so that All Projects is now your pinned list view. From now on, each time you visit this tab it will default to showing you all projects. You can change this to a different default at any time by selecting a different view and pinning it.

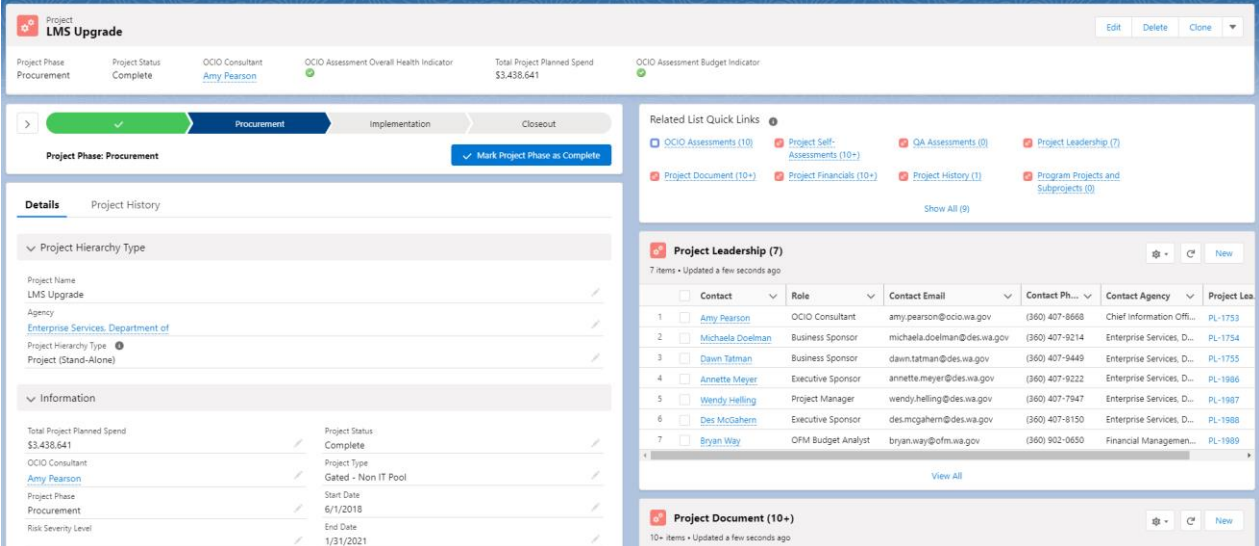


- c. To view a particular project's details, Click into the Project Name column.


 A screenshot of a table view for 'Projects All Projects'. The table has columns for 'Account', 'Project Name', and 'Project Status'. The first row shows 'Enterprise Services, Department of' for the account and 'LMS Upgrade' for the project name.

Account ↑	Project Name	Project Status
47 Enterprise Services, Department of	LMS Upgrade	Active - IT Pool

- d. View the Project's details on the left and the related information on the right.



Project LMS Upgrade

Project Phase: Procurement | Project Status: Complete | OCIO Consultant: Amy Pearson | OCIO Assessment Overall Health Indicator: ● | Total Project Planned Spend: \$3,438,641 | OCIO Assessment Budget Indicator: ●

Project Phase: Procurement | [Mark Project Phase as Complete](#)

Details | Project History

Project Hierarchy Type

- Project Name: LMS Upgrade
- Agency: Enterprise Services, Department of
- Project Hierarchy Type: Project (Stand-Alone)

Information

Total Project Planned Spend: \$3,438,641	Project Status: Complete
OCIO Consultant: Amy Pearson	Project Type: Gated - Non IT Pool
Project Phase: Procurement	Start Date: 6/1/2018
Risk Severity Level:	End Date: 1/31/2021

Related List Quick Links

- OCIO Assessments (10)
- Project Self-Assessments (10+)
- QA Assessments (0)
- Project Leadership (7)
- Project Document (10+)
- Project Financials (10+)
- Project History (1)
- Program Projects and Subprojects (0)

Show All (9)

Project Leadership (7)

7 items • Updated a few seconds ago

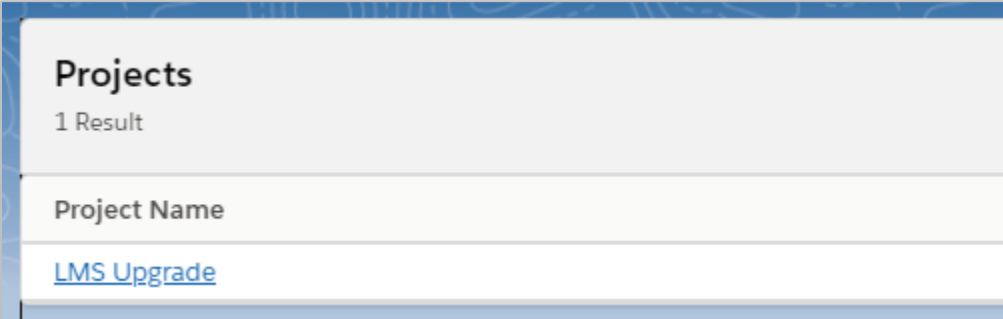
Contact	Role	Contact Email	Contact Ph...	Contact Agency	Project Lea
<input type="checkbox"/> Amy Pearson	OCIO Consultant	amy.pearson@ocio.wa.gov	(360) 407-8668	Chief Information Offi...	PL-1753
<input type="checkbox"/> Michaela Doelman	Business Sponsor	michaela.doelman@des.wa.gov	(360) 407-9214	Enterprise Services, D...	PL-1734
<input type="checkbox"/> Dawn Tatman	Business Sponsor	dawn.tatman@des.wa.gov	(360) 407-9449	Enterprise Services, D...	PL-1755
<input type="checkbox"/> Annette Meyer	Executive Sponsor	annette.meyer@des.wa.gov	(360) 407-9222	Enterprise Services, D...	PL-1986
<input type="checkbox"/> Wendy Helling	Project Manager	wendy.helling@des.wa.gov	(360) 407-7947	Enterprise Services, D...	PL-1987
<input type="checkbox"/> Des McGahern	Executive Sponsor	des.mcgahearn@des.wa.gov	(360) 407-8150	Enterprise Services, D...	PL-1988
<input type="checkbox"/> Bryan Way	OFM Budget Analyst	bryan.way@ofm.wa.gov	(360) 902-0650	Financial Managemen...	PL-1989

[View All](#)

Project Document (10+)

10+ items • Updated a few seconds ago

5. To find a specific project, the best method is to search for it using the Global Search bar at the top. Type in a search term and hit enter.



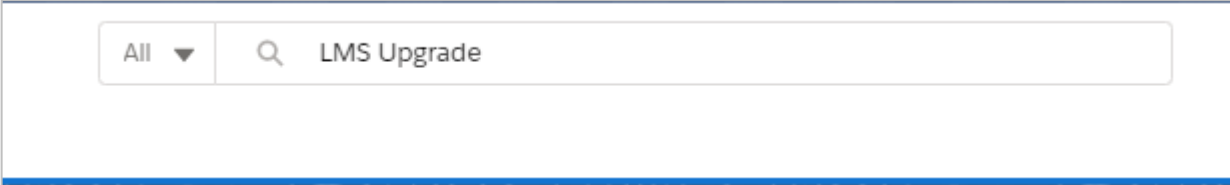
Projects

1 Result

Project Name

[LMS Upgrade](#)

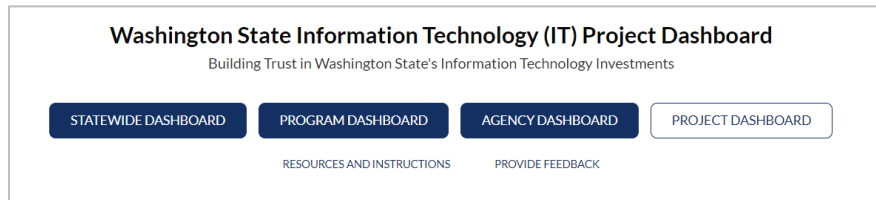
6. Click on the project name to get to the Project Details.



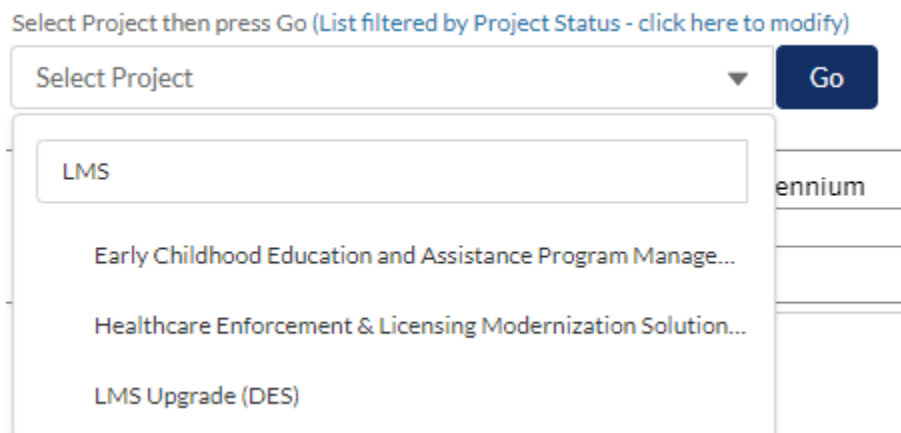
All ▼

Note: To view the same project on the front end, public facing dashboard, follow these steps.

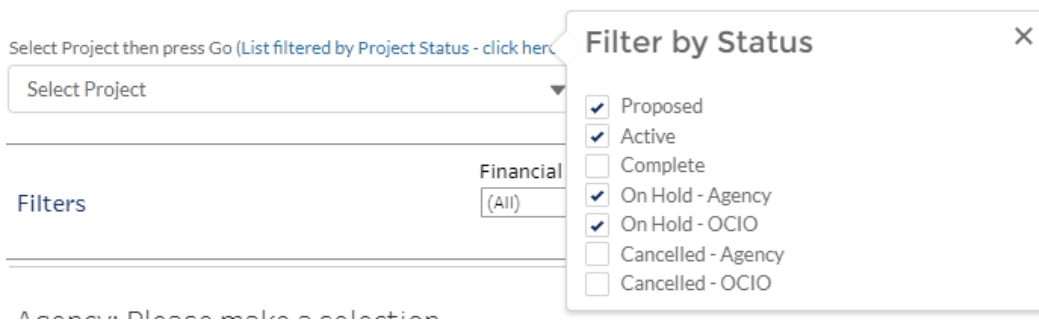
- a. Navigate to public facing dashboard site: waciportal.force.com/s/.
- b. Click on the **Project Dashboard** button.



- c. Select the project from the drop-down menu. The search box may be used to filter the list of results to just those containing the search term:



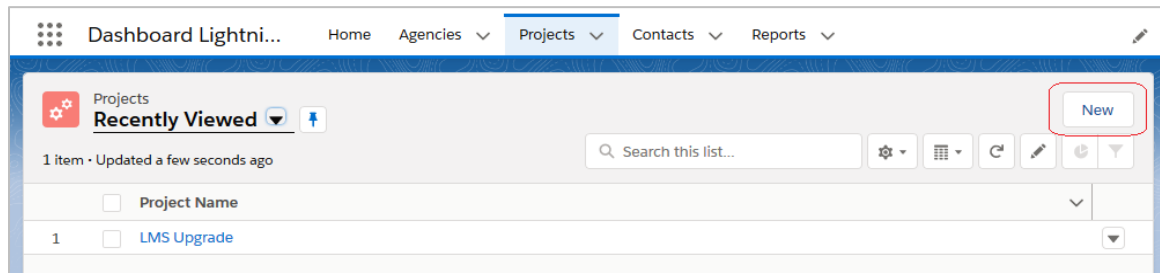
- d. Additionally, the list of projects is filtered by Project Status. Click the "List filtered by Project Status – click here to modify" link to change which projects are available in the drop-down menu:



Entering a New Project (OCIO Administrators only)

If you have permission, you can enter a new project in the system. If you do not have permission, this is entered by your OCIO consultant.

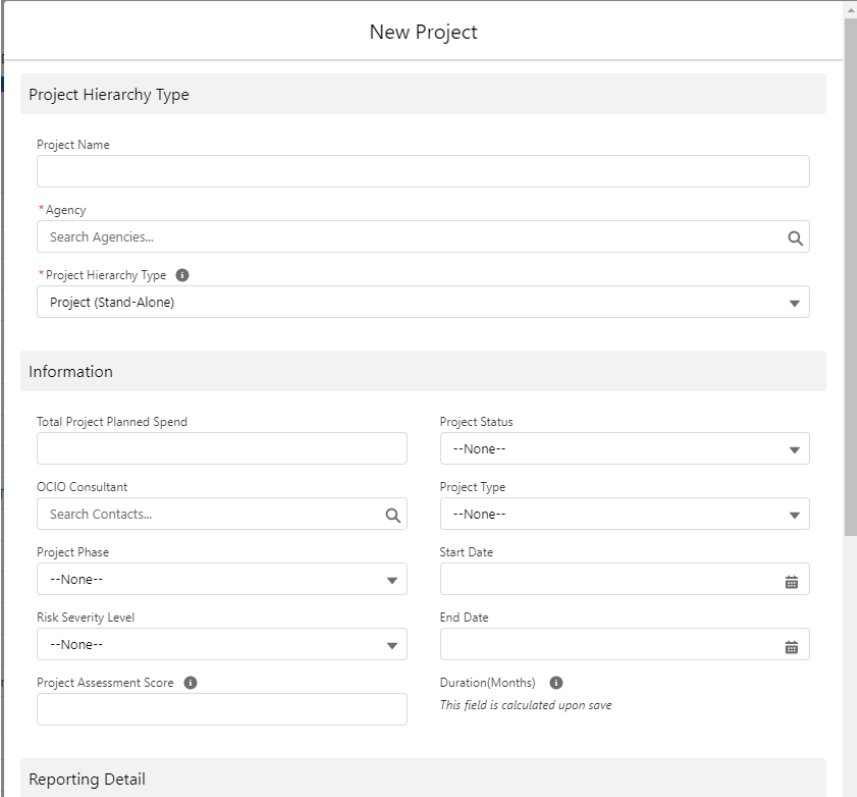
1. Click on the **Projects** tab and click the **New** button.



2. Fill out the **New Project** form.
 - a. For the **Account** field enter the state agency related to this project.

For the **Project Hierarchy Type** be sure to choose the correct type. All projects that are not part of a program should use **Project (Stand-Alone)**. This is the majority of all projects. Projects that are part of a program will use one of three options.

- **Program (Top Layer)** should be used to create a parent record that encompasses the entire program. A program may have up to three layers and this is the top layer.
- **Parent Project (Middle Layer)** is used to indicate a middle layer project. A single program may have multiple



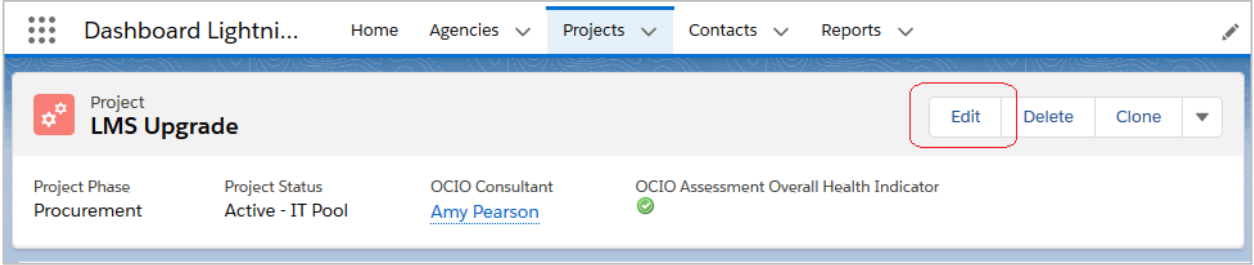
projects representing different areas or agencies.

- **Subproject (Bottom Layer)** is the third layer. A single middle layer project may have multiple subprojects.
- b. Enter the necessary information in the **Information and Reporting Detail** sections of the page.
 - c. If desired enter information into the **Current Project Status** and **Additional Information** sections.
 - d. Click **Save** to save the project to the database.

Updating Project Information (OCIO Administrators only)

If you have permission, you can update the Project Information by following the steps below. If you do not have permission, this is entered by your OCIO consultant.

1. Navigate to the project as described in the [Finding Project Data and Information](#) section of this document.
2. On the project detail screen, click the **Edit** button to switch to the edit screen.

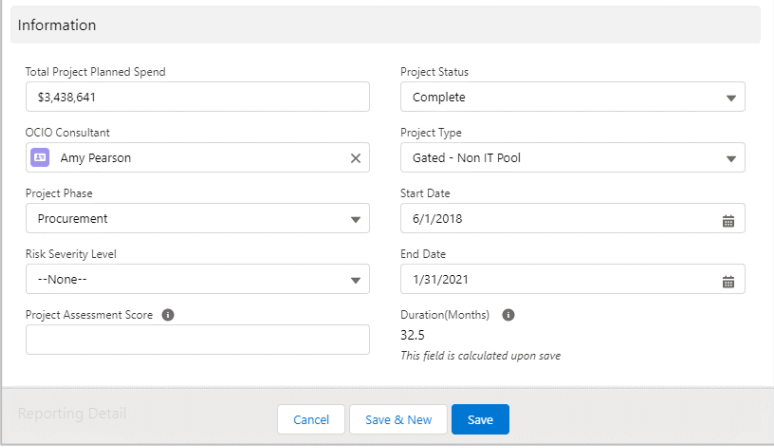


Dashboard Lightni... Home Agencies ▾ **Projects** ▾ Contacts ▾ Reports ▾

Project **LMS Upgrade** Edit Delete Clone ▾

Project Phase	Project Status	OCIO Consultant	OCIO Assessment Overall Health Indicator
Procurement	Active - IT Pool	Amy Pearson	✓

3. Update the desired information and click **Save**.



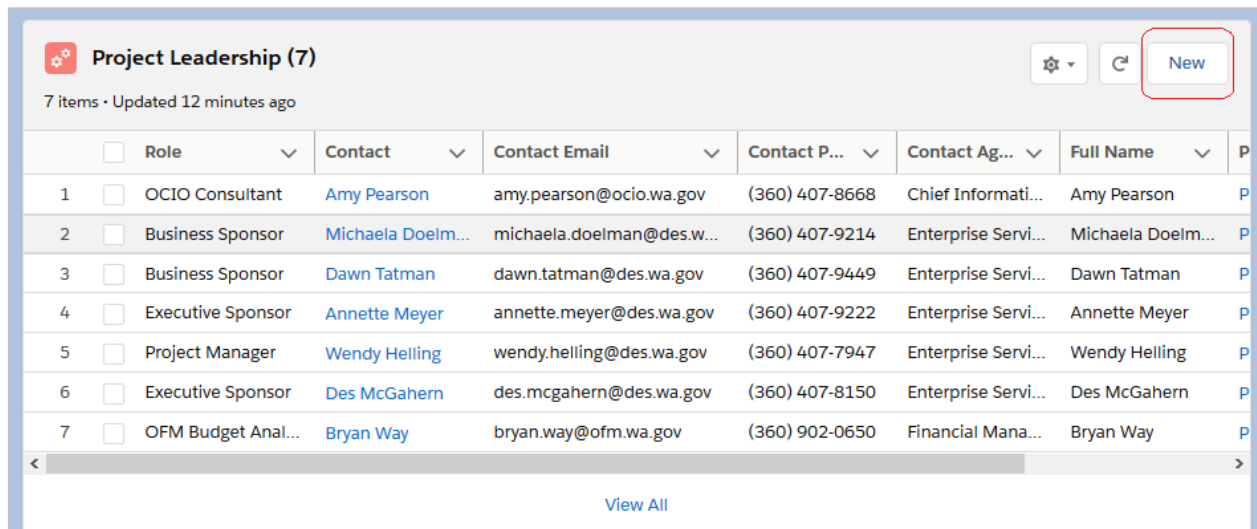
Information

Total Project Planned Spend \$3,438,641	Project Status Complete ▾
OCIO Consultant ES Amy Pearson ×	Project Type Gated - Non IT Pool ▾
Project Phase Procurement ▾	Start Date 6/1/2018 🗑️
Risk Severity Level --None-- ▾	End Date 1/31/2021 🗑️
Project Assessment Score ⓘ <input type="text"/>	Duration(Months) ⓘ 32.5 <i>This field is calculated upon save</i>

Reporting Detail Cancel Save & New Save

Adding Project Leadership Records

1. Navigate to the project as described in the [Find Project Data and Information](#) section of this document.
2. On the right side of the screen, the related list of Project Leadership records is displayed. Click **New** to enter a new project leadership record.



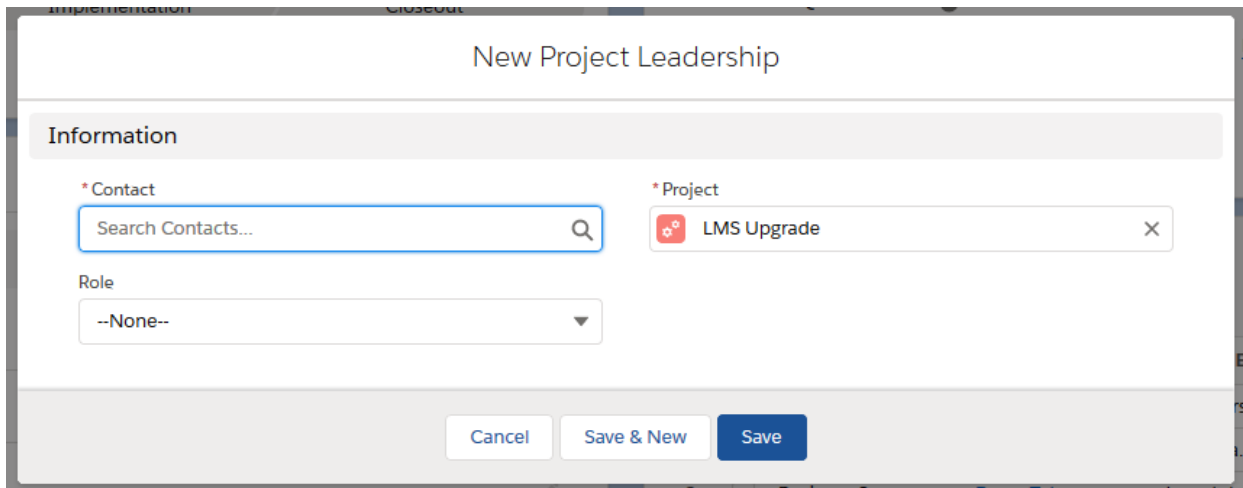
Project Leadership (7) ⚙️ 🔄 **New**

7 items • Updated 12 minutes ago

<input type="checkbox"/>	Role	Contact	Contact Email	Contact P...	Contact Ag...	Full Name	P
<input type="checkbox"/>	OCIO Consultant	Amy Pearson	amy.pearson@ocio.wa.gov	(360) 407-8668	Chief Informati...	Amy Pearson	P
<input type="checkbox"/>	Business Sponsor	Michaela Doelm...	michaela.doelman@des.w...	(360) 407-9214	Enterprise Servi...	Michaela Doelm...	P
<input type="checkbox"/>	Business Sponsor	Dawn Tatman	dawn.tatman@des.wa.gov	(360) 407-9449	Enterprise Servi...	Dawn Tatman	P
<input type="checkbox"/>	Executive Sponsor	Annette Meyer	annette.meyer@des.wa.gov	(360) 407-9222	Enterprise Servi...	Annette Meyer	P
<input type="checkbox"/>	Project Manager	Wendy Helling	wendy.helling@des.wa.gov	(360) 407-7947	Enterprise Servi...	Wendy Helling	P
<input type="checkbox"/>	Executive Sponsor	Des McGahern	des.mcguhern@des.wa.gov	(360) 407-8150	Enterprise Servi...	Des McGahern	P
<input type="checkbox"/>	OFM Budget Anal...	Bryan Way	bryan.way@ofm.wa.gov	(360) 902-0650	Financial Mana...	Bryan Way	P

[View All](#)

3. This will provide a screen to associate a contact to this Project.



New Project Leadership

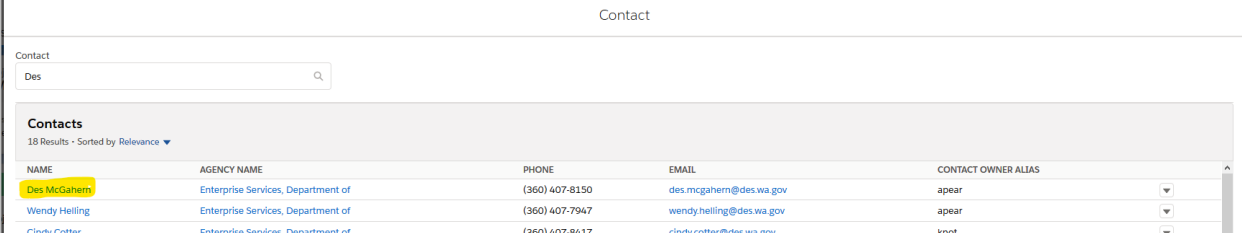
Information

* Contact

* Project

Role

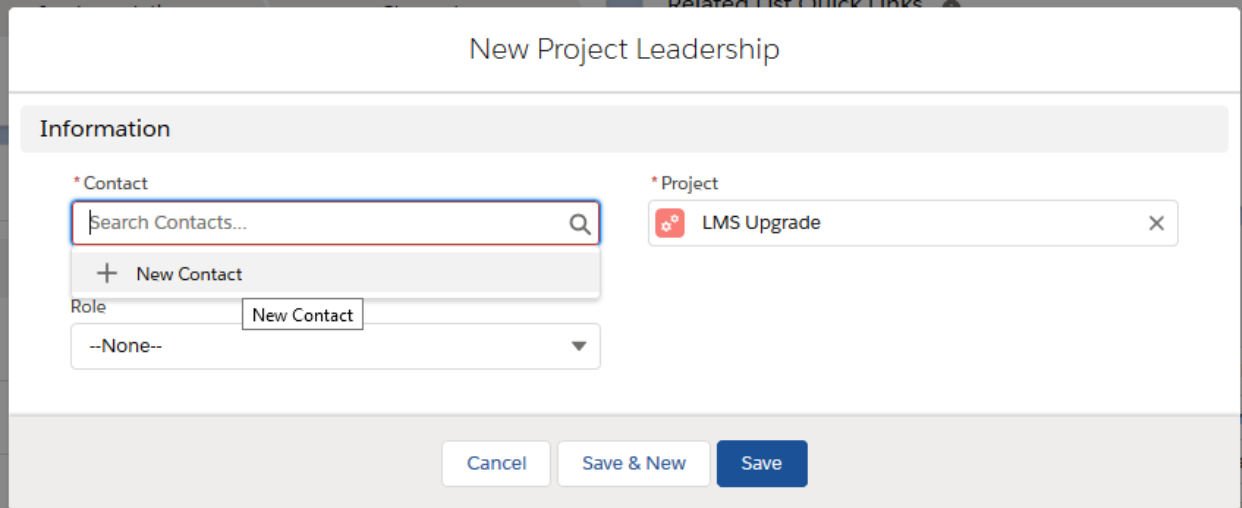
4. Search for the contact by typing the individual's name into the **Contact** box and hitting enter. A search results screen will appear from which the appropriate contact can be selected.



NAME	AGENCY NAME	PHONE	EMAIL	CONTACT OWNER ALIAS
Des McGahern	Enterprise Services, Department of	(360) 407-8150	des.mcgahe@des.wa.gov	appear
Wendy Helling	Enterprise Services, Department of	(360) 407-7947	wendy.helling@des.wa.gov	appear
Cindy Cotter	Enterprise Services, Department of	(360) 407-8417	cindy.cotter@des.wa.gov	knot

5. In some cases, the desired contact may not be found in the system.

If after searching, it is determined the contact needs to be added, cancel out of the search screen to return to the **New Project Leadership** screen. From here click into the **Contact** field.



- a. Click the **+ New Contact** link, fill out the new Contact field and be sure to associate it to the correct state agency in the **Agency Name** field.

New Contact

Contact Information

Contact Owner
NeilTest JamisonTest

Phone

* Name

Salutation
--None--

Mobile
541-000-0000

First Name
John

* Last Name
Doe

Agency Name
Enterprise Services, Department of

Email
JohnDoe@example.com

Title

Reports To
Search Contacts...

Personal Email

"CIO" Role ?

Address Information

Mailing Address
Mailing Street

Other Address
Other Street

Cancel Save & New Save

NOTE: If a new Agency needs to be created please contact the System Administrator.

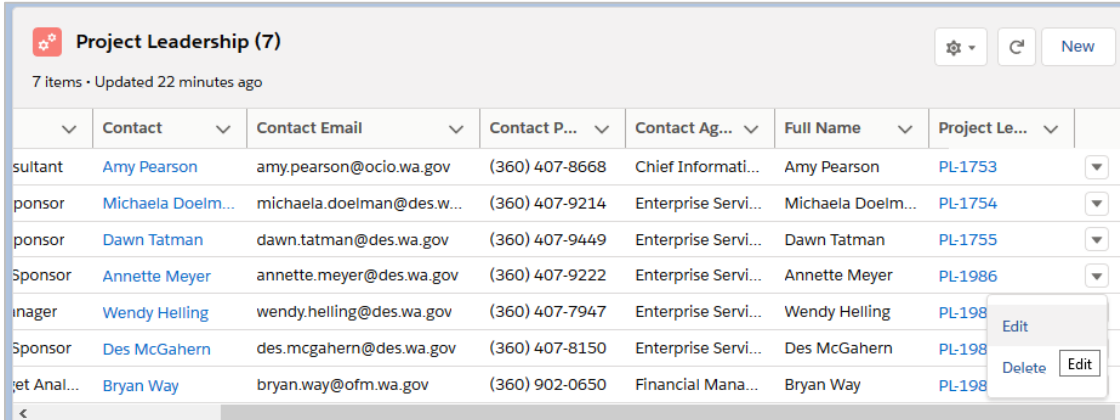
- b. Click **Save**. The contact record should populate into the Contact field.
6. Once a **Contact** is selected, choose a **Role** from the drop down and click **Save**.

Role

Executive Sponsor

Cancel Save & New Save

- To edit an existing Project Leadership role, scroll all the way to the right in the Project Leadership box and choose **Edit** from the drop-down menu on the record you wish to edit.



Project Leadership (7)
7 items • Updated 22 minutes ago

	Contact	Contact Email	Contact P...	Contact Ag...	Full Name	Project Le...	
sultant	Amy Pearson	amy.pearson@ocio.wa.gov	(360) 407-8668	Chief Informati...	Amy Pearson	PL-1753	
ponsor	Michaela Doelm...	michaela.doelman@des.w...	(360) 407-9214	Enterprise Servi...	Michaela Doelm...	PL-1754	
ponsor	Dawn Tatman	dawn.tatman@des.wa.gov	(360) 407-9449	Enterprise Servi...	Dawn Tatman	PL-1755	
Sponsor	Annette Meyer	annette.meyer@des.wa.gov	(360) 407-9222	Enterprise Servi...	Annette Meyer	PL-1986	
anager	Wendy Helling	wendy.helling@des.wa.gov	(360) 407-7947	Enterprise Servi...	Wendy Helling	PL-198	
Sponsor	Des McGahern	des.mcgahearn@des.wa.gov	(360) 407-8150	Enterprise Servi...	Des McGahern	PL-198	Edit
get Anal...	Bryan Way	bryan.way@ofm.wa.gov	(360) 902-0650	Financial Mana...	Bryan Way	PL-198	Delete Edit

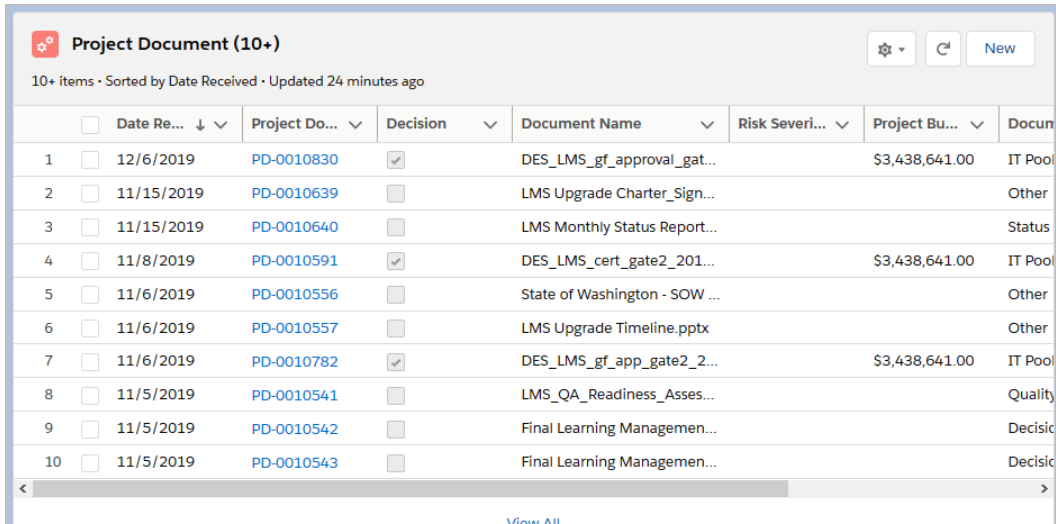
- After the next data refresh, the project leadership record will appear on the Project Dashboard as illustrated here (for illustration purposes only).



Full Name	Role	Email	Business Phone	Contact Agency
Amy Pearson	OCIO Consultant	amy.pearson@ocio.wa.gov	(360) 407-8668	Chief Information Officer, Office of the
Annette Meyer	Executive Sponsor	annette.meyer@des.wa.gov	(360) 407-9222	Enterprise Services, Department of
Bryan Way	OFM Budget Analyst	bryan.way@ofm.wa.gov	(360) 902-0650	Financial Management, Office of
Dawn Tatman	Business Sponsor	dawn.tatman@des.wa.gov	(360) 407-9449	Enterprise Services, Department of
Des McGahern	Executive Sponsor	des.mcgahearn@des.wa.gov	(360) 407-8150	Enterprise Services, Department of
Michaela Doelman	Business Sponsor	michaela.doelman@des.wa.gov	(360) 407-9214	Enterprise Services, Department of
Wendy Helling	Project Manager	wendy.helling@des.wa.gov	(360) 407-7947	Enterprise Services, Department of

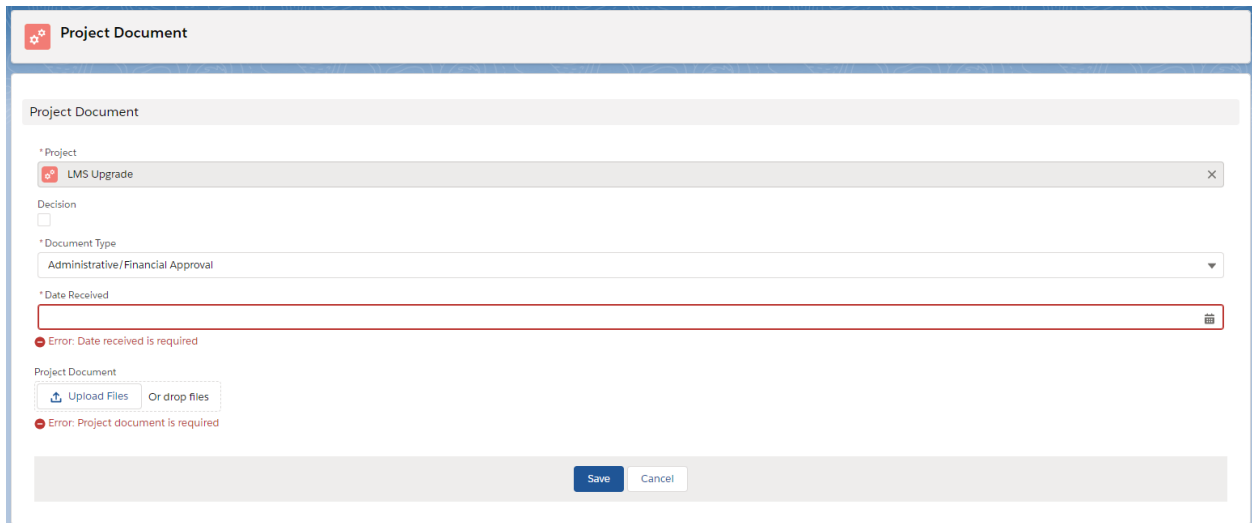
Uploading a Project Document

1. Navigate to the project as described in the [Finding Project Data and Information](#) section of this document.
2. On the right side of the screen, the related list of Project Document records is displayed. Click **New** to enter a new project document record.



	<input type="checkbox"/>	Date Re... ↓	Project Do... ↓	Decision ↓	Document Name ↓	Risk Severi... ↓	Project Bu... ↓	Docum
1	<input type="checkbox"/>	12/6/2019	PD-0010830	<input checked="" type="checkbox"/>	DES_LMS_gf_approval_gat...		\$3,438,641.00	IT Pool
2	<input type="checkbox"/>	11/15/2019	PD-0010639	<input type="checkbox"/>	LMS Upgrade Charter_Sign...			Other
3	<input type="checkbox"/>	11/15/2019	PD-0010640	<input type="checkbox"/>	LMS Monthly Status Report...			Status
4	<input type="checkbox"/>	11/8/2019	PD-0010591	<input checked="" type="checkbox"/>	DES_LMS_cert_gate2_201...		\$3,438,641.00	IT Pool
5	<input type="checkbox"/>	11/6/2019	PD-0010556	<input type="checkbox"/>	State of Washington - SOW ...			Other
6	<input type="checkbox"/>	11/6/2019	PD-0010557	<input type="checkbox"/>	LMS Upgrade Timeline.pptx			Other
7	<input type="checkbox"/>	11/6/2019	PD-0010782	<input checked="" type="checkbox"/>	DES_LMS_gf_app_gate2_2...		\$3,438,641.00	IT Pool
8	<input type="checkbox"/>	11/5/2019	PD-0010541	<input type="checkbox"/>	LMS_QA_Readiness_Asses...			Quality
9	<input type="checkbox"/>	11/5/2019	PD-0010542	<input type="checkbox"/>	Final Learning Managemen...			Decisic
10	<input type="checkbox"/>	11/5/2019	PD-0010543	<input type="checkbox"/>	Final Learning Managemen...			Decisic

3. Fill out the form. Different fields are required based on which selections are made; the system will indicate for you which fields are required.



Project Document

Project Document

*Project
LMS Upgrade

Decision

*Document Type
Administrative/Financial Approval

*Date Received
[Empty field with red border]

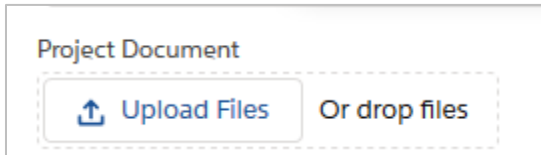
● Error: Date received is required

Project Document
Upload Files Or drop files

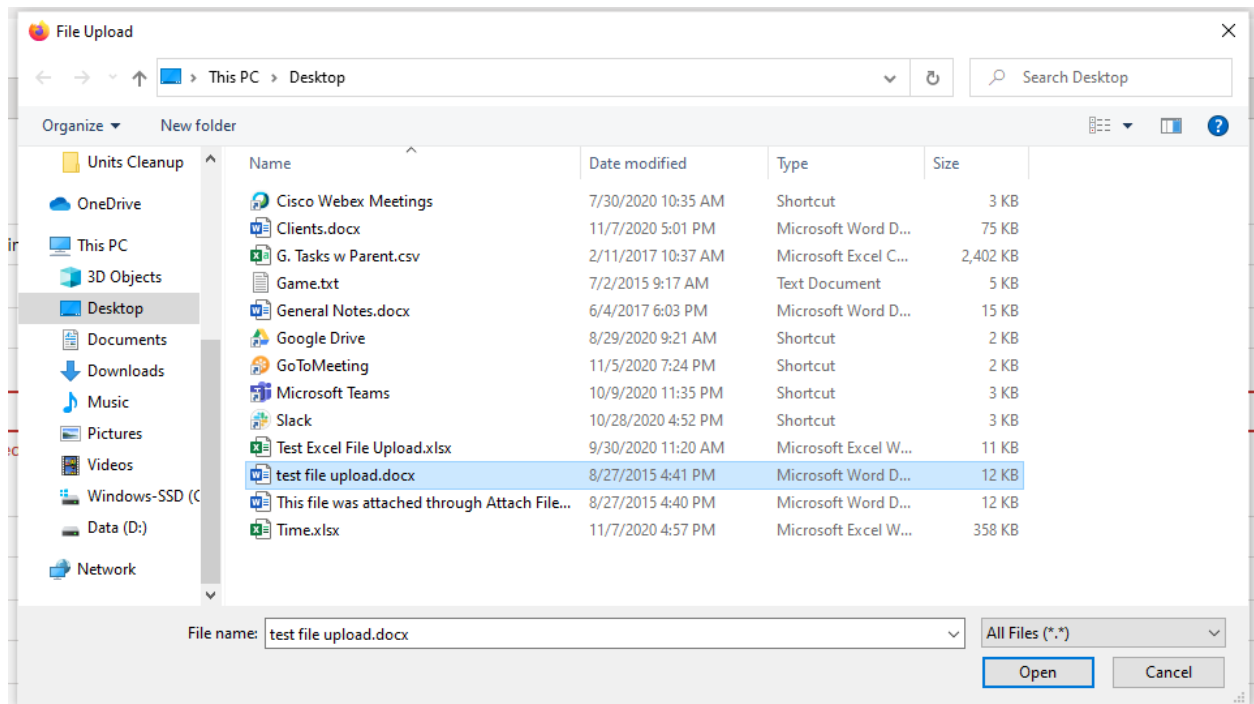
● Error: Project document is required

Save Cancel

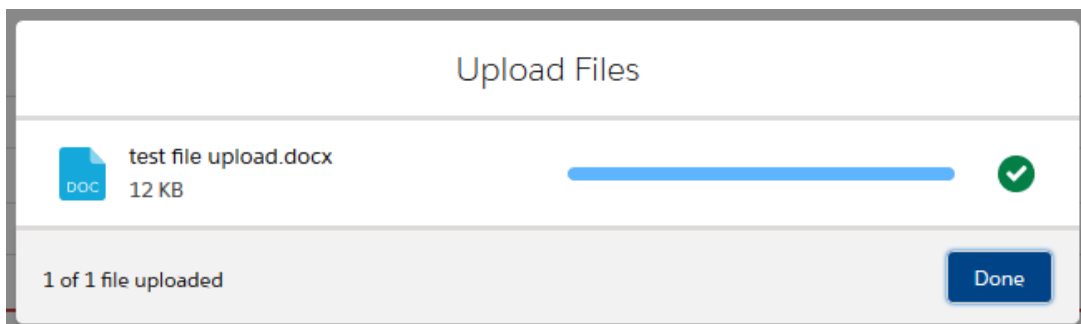
- After filling out the required fields upload a file by clicking the **Upload Files** button.



- Select a file and click **Open**.



- Wait for the file to finish uploading and then click **Done**.



Note: Only one file can be uploaded per Project Document record. If you attempt to upload another file it will overwrite the first file. If you accidentally uploaded the wrong file just upload the correct file by using the Upload Files button again.

Project Document
(Use the Upload Files button to attach a file. If a file has already been uploaded, using the Upload Files button again will replace the existing file with the new one being uploaded.)

VerticalPageLoadIssue2

- After the next refresh, the project document uploaded will appear on the Project Dashboard sorted by Document Type and then by Date Received.

Documents					Document Category	Document Type
(Click on document name to download document)					(All)	(All)
Type	Name	Document Type	Document Name	Received		
Project Documents	Cloud-Continuity of Operations	Administrative/Financial Approval	test_doc.docx	2020-11-05		
		Concept Briefing/Preliminary Business Case	DOI_CLDCooP_concept_briefing_20190911.pdf	2019-09-11		
		Investment Plan	sample_doc.docx	2019-12-05		
		ITPA (Information Technology Project Assessment)	DOL_CLDCooP_ITPA_20190627.pdf	2019-06-27		
		Project Deliverables	DOL Cloud DR Independent QA Contract Details.pdf	2019-11-27		
			Cloud DR Project Charter - Signed.pdf	2019-11-26		
			WA DOL Cloud DR Project QA Plan V-1_10.pdf	2019-11-26		
		QA - Agency Response	image(28).png	2020-12-01		
		Quality Assurance Report	QA Monthly Report 20201211 sample_doc.pdf	2020-12-11		
		Status Report	DOL Cloud DR Project Status Report - 12062019.pdf	2019-12-06		
			DOL Cloud DR Status Report - 11252019.pdf	2019-11-25		
		Technology Budget (IT Pool)	DOI_CloudCooP_TechBudget_20191205.xlsx	2019-12-05		
		Technology Budget (Non-gated)	sample_doc.docx	2020-10-07		
		Technology Budget Amendment (IT Pool)	test file upload.docx	2020-10-28		
			Test Excel File Upload.xlsx	2020-10-07		

Uploading Technology Budget Amendments and Viewing Amendment Summaries (OCIO Administrators only)

Technology Budget Amendments are Project Document records of a certain type. OCIO administrators are the only ones who upload technology budget amendments. While dashboard contributing users can view and have access to these data entry screens, they do not upload technology budget and amendment documents. Dashboard contributing users only view technology budget amendment documents and summaries from the public facing dashboard.

1. To upload a Technology Budget Amendment, when creating a new project document select the **Document Type** as either **Technology Budget Amendment (Non-Gated)** or **Technology Budget Amendment (IT Pool)**.
2. The system will require several additional questions to be answered as illustrated below.

Project Document

* Project
LMS Upgrade

Decision

* Document Type
Technology Budget Amendment (IT Pool)

* What changed?

* Why was there a change?

* How does this Impact scope?

* How does this Impact schedule?

* How does this Impact budget?

* Date Received
Nov 30, 2020

Project Document
(Use the Upload Files button to attach a file. If a file has already been uploaded, using the Upload Files button again will replace the existing file with the new one being uploaded.)

Or drop files

VerticalPageLoadIssue2

- The technology budget amendment documents and summaries will appear on the public facing dashboard in the Summary of Technology Budget Amendments section.

Washington State Information Technology (IT) Project Dashboard

Building Trust in Washington State's Information Technology Investments

STATEWIDE DASHBOARD
PROGRAM DASHBOARD
AGENCY DASHBOARD
PROJECT DASHBOARD

RESOURCES AND INSTRUCTIONS
PROVIDE FEEDBACK

Select Project

LMS Upgrade ▼


Filters

Financial Biennium

(All) ▼

Agency: Enterprise Services, Department of

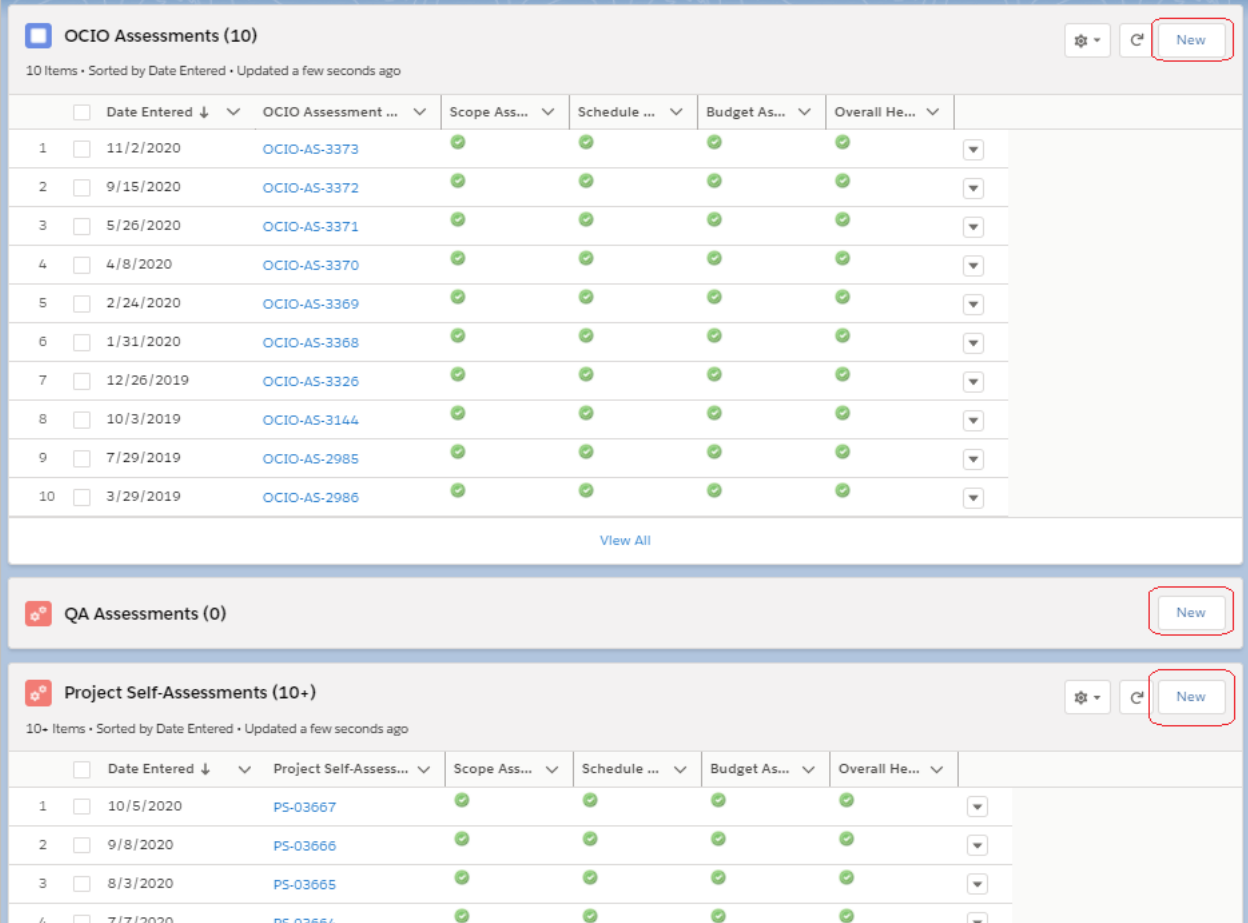
Project: LMS Upgrade

Summary of Technology Budget Amendments 						
<small>(click on amendment name to download document)</small>						
Date Received	What changed?	Why was there a change?	How does this impact scope?	How does this impact schedule?	How does this impact budget?	Amendment Name
10/28/2020	Change to Budget and Scope	New feature requested	Expands scope to include the Widget functionality	No impact. We are able to fit with in existing schedule.	Budget increase by 20,000.	test file upload.docx
10/8/2020	This is an example text that has 255 characters in it. This is to demonstrate what the field looks like when there is a lot of text. It...	This is an example text that has 255 characters in it. This is to demonstrate what the field looks like when there is a lot of text. It...	This is an example text that has 255 characters in it. This is to demonstrate what the field looks like when there is a lot of text. It...	This is an example text that has 255 characters in it. This is to demonstrate what the field looks like when there is a lot of text. It...	This is an example text that has 255 characters in it. This is to demonstrate what the field looks like when there is a lot of text. It...	Test Excel File Upload.xlsx
10/7/2020	We updated the end date	We needed more time for testing	There was no impact.	Our schedule extended 30 days to Nov 30	There was no impact.	Test Excel File Upload.xlsx
10/1/2020	This is what changed	A new legislative requirement was passed	We need to include an additional reporting requirement.	We estimate a 1 week extension to account for the new reporting requirement.	Increase of \$2000 for additional consulting resource.	test file upload.docx

Entering Project, OCIO and QA Assessments

If you have permission you will be able to add Project Assessment, OCIO Assessment or QA Assessment records from the Project Detail screen.

1. Navigate to the project as described in the [Find Project Data and Information](#) section of this document.
2. On the right side of the screen, one or more related lists of assessment records are displayed. All three of the sections work similarly. Click **New** to enter a new assessment record of the desired type.



The screenshot displays three assessment record sections. Each section has a 'New' button highlighted with a red box. The OCIO and Project Self-Assessments sections contain tables with columns for Date Entered, assessment ID, and status indicators for Scope, Schedule, Budget, and Overall Health. The QA section is currently empty.

OCIO Assessments (10)						
10 Items • Sorted by Date Entered • Updated a few seconds ago						
	Date Entered ↓	OCIO Assessment ...	Scope Ass...	Schedule ...	Budget As...	Overall He...
1	11/2/2020	OCIO-AS-3373	✓	✓	✓	✓
2	9/15/2020	OCIO-AS-3372	✓	✓	✓	✓
3	5/26/2020	OCIO-AS-3371	✓	✓	✓	✓
4	4/8/2020	OCIO-AS-3370	✓	✓	✓	✓
5	2/24/2020	OCIO-AS-3369	✓	✓	✓	✓
6	1/31/2020	OCIO-AS-3368	✓	✓	✓	✓
7	12/26/2019	OCIO-AS-3326	✓	✓	✓	✓
8	10/3/2019	OCIO-AS-3144	✓	✓	✓	✓
9	7/29/2019	OCIO-AS-2985	✓	✓	✓	✓
10	3/29/2019	OCIO-AS-2986	✓	✓	✓	✓

QA Assessments (0)						
View All						

Project Self-Assessments (10+)						
10+ Items • Sorted by Date Entered • Updated a few seconds ago						
	Date Entered ↓	Project Self-Assess...	Scope Ass...	Schedule ...	Budget As...	Overall He...
1	10/5/2020	PS-03667	✓	✓	✓	✓
2	9/8/2020	PS-03666	✓	✓	✓	✓
3	8/3/2020	PS-03665	✓	✓	✓	✓
4	7/7/2020	PS-03664	✓	✓	✓	✓

3. Select the status of the Scope, Schedule, Budget and Overall Health by choosing from the picklist menus.

4. Enter text descriptions for each of the assessments in the appropriate boxes. There is a 255-character limit for Scope, Schedule and Budget. There is a 1,000-character limit for Overall Health Assessment Narrative.
5. Provide a Date Entered.

This field is calculated upon save

* Scope Assessment
Green

Scope Assessment Narrative
The project's expected scope was met.

* Schedule Assessment
Green

Schedule Assessment Narrative
The project's was on time according to the approved schedule.

* Budget Assessment
Green

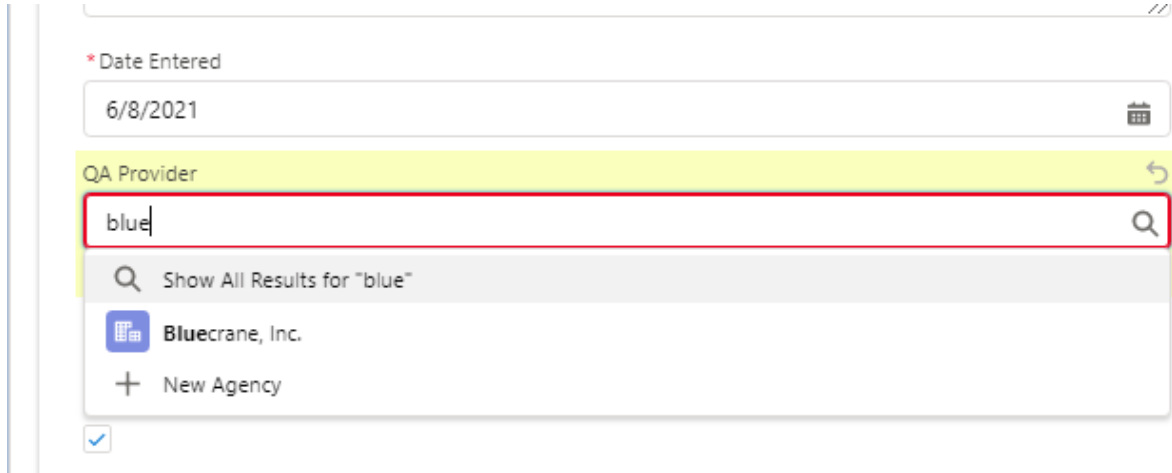
Budget Assessment Narrative
The project's was successfully launched within existing budget.

* Overall Health Assessment
Green

Overall Health Assessment Narrative
November 2, 2020 is go live day for the launch of the Improved enterprise learning management system, The Learning Center (TLC). TLC is an upgrade to meet the training needs of agencies across Washington. Project

* Date Entered
11/2/2020

- If entering a QA Assessment, use the lookup to indicate the QA Provider. If you are unable to find the QA Provider, please contact OCIOConsultants@ocio.wa.gov.



*Date Entered

6/8/2021

QA Provider

blue

Show All Results for "blue"

Bluecrane, Inc.

+ New Agency

- The information entered in the QA Provider will show up on the Dashboard in the Assessments section in the hover:

Quality Assurance Assessments ⓘ
(hover over circle for explanations)

Scope	Schedule	Budget	Overall Health
Date Entered... 6/8/2021 ● Green	Date Entered... 6/8/2021 ● Green	Date Entered... 6/8/2021 ● Green	Date Entered... 6/8/2021 ● Green
12/11/2020 ● Green	12/11/2020 ● Green	12/11/2020 ● Green	12/11/2020 ● Green
4/1/2020 ● Green	4/1/2020 ● Yellow	4/1/2020 ● Green	4/1/2020 ● Green
3/1/2020 ● Yellow	3/1/2020 ● Yellow	3/1/2020 ● Yellow	3/1/2020 ● Yellow
2/1/2020 ● Red	2/1/2020 ● Red	2/1/2020 ● Red	2/1/2020 ● Red

Cloud - Continuity of Operations

Schedule Assessment: Green

Schedule Assessment Entered On: 6/8/2021

QA Provider: **Bluecrane, Inc.**

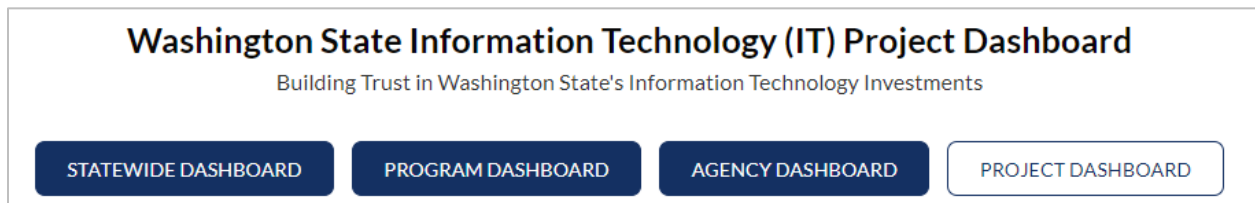
Project Name: test

Explanation: test

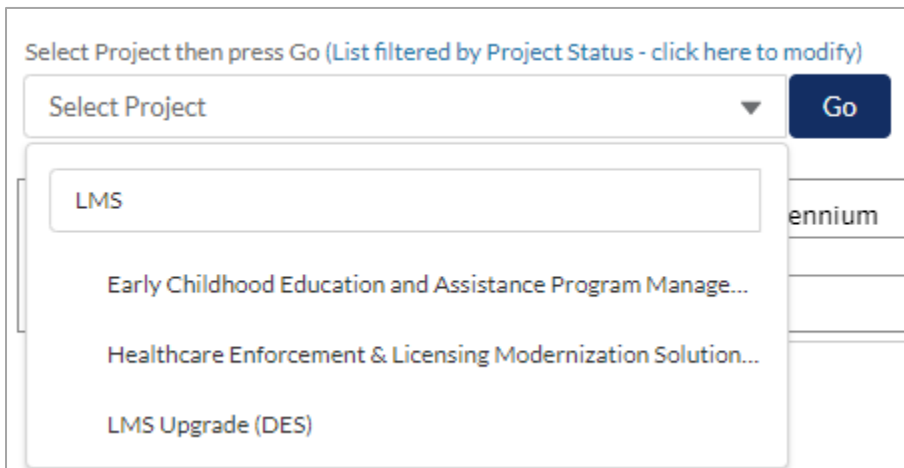
- Click **Save** to complete the entry of the assessment.

Linking to a project webpage

1. Navigate to the Washington State IT Project Dashboard: waciportal.force.com/s/.
2. Click on the **Project Dashboard**.



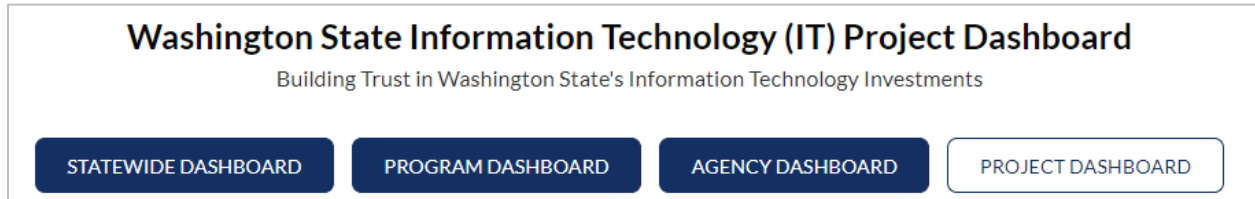
3. Select the desired project from the drop-down menu and then press Go. These tips can be used to more easily find the project in the list:
 - a. The search box may be used to more easily find a project by name.
 - b. If the agency for the project is known, searching by the 3-character agency abbreviation will limit the list to just projects for that agency.
 - c. If the project status is known, clicking the "List filtered by Project Status – click here to modify" link allows limiting the list of projects to just those of the selected statuses.



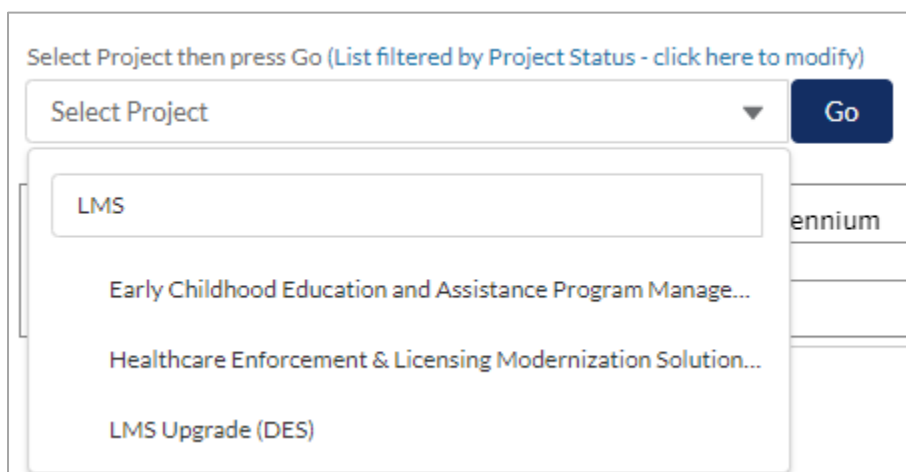
4. Copy the URL from the browser window (see sample below).
waciportal.force.com/s/projectdashboard?Project%20Selector=LMS%20Upgrade
5. Share this hyperlink as desired.

Exporting Data

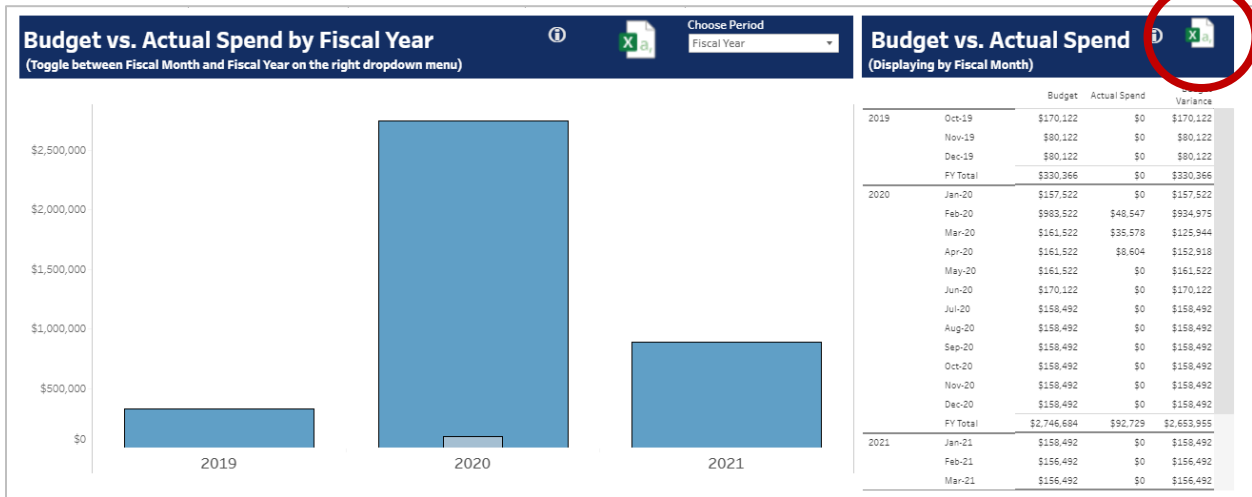
1. Navigate to the dashboard: waciportal.force.com/s/.
2. Click on the **Dashboard** button for the dashboard you wish to export data from (i.e., statewide, program, agency, project).



3. If the dashboard requires selecting a Program, Agency or Project do that next. Select the desired project from the drop-down menu and then press Go. These tips can be used to more easily find the project in the list:
 - a. The search box may be used to more easily find a project by name.
 - b. If the agency for the project is known, searching by the 3-character agency abbreviation will limit the list to just projects for that agency.
 - c. If the project status is known, clicking the "List filtered by Project Status – click here to modify" link allows limiting the list of projects to just those of the selected statuses.



4. Where you see icons for Excel or PDF, click on these icons for a download of the data that is used to generate the chart or graph. For accessibility options, see [Appendix B: Accessibility](#).



Here is an example of a PDF icon.

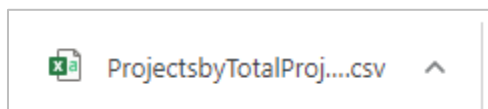


5. The data then will be exported to a .csv or .pdf file to be opened in your browser. Browsers vary in their behavior but many of them will download to the bottom left corner of the screen.

- a. Download may take a few seconds. At the bottom left corner of your screen you may see a message while the data is downloading.



- b. After download, the file will appear wherever your normal browser downloads appear, often in the lower left corner of your screen.



Appendix A: Changes in Dashboard Terminology

This appendix details the document type, key performance indicator, project status and project type terminology that is changing in the 2021 version of the Washington State Information Technology Project Dashboard compared to prior versions. Hyperlinks are provided to link you to definitions for each of the new terms. These terms and definitions are also available in the dashboard [Glossary](#).

Category	2019 Version	December 2020 Version	June 2021 Version
Document Type	Agency QA Response	QA - Agency Response	No Change
Document Type	Amended Investment Plan	Investment Plan Amendment	No Change
Document Type	IT Pool - Amended Technology Implementation Plan/Investment Plan	Removed	No Change
Document Type	IT Pool - Amended Technology Budget	Technology Budget Amendment (IT Pool)	No Change
Document Type	IT Pool - Technology Implementation Plan/Investment Plan	Removed	No Change
Document Type	ITPA - IT Project Assessment	ITPA (Information Technology Project Assessment)	No Change
Document Type	Policy Waiver Request	Policy Waiver Request/Response	No Change
Document Type	Technology Budget - Non-Gated - Amended	Technology Budget Amendment (Non-gated)	No Change
Key Performance Indicator	Budget	Total Planned Spend	No Change
Key Performance Indicator	None	M&O Start Date	No Change
Project Status		Active – IT Pool	Active
Project Status		Cancelled – IT Pool	Cancelled
Project Status		Complete – IT Pool	Complete
Project Status		On-Hold – IT Pool	On Hold
Project Status		Proposed – IT Pool	Proposed
Project Status		On Hold	Separated into: On Hold – Agency On Hold – OCIO
Project Status		Cancelled	Separated into:

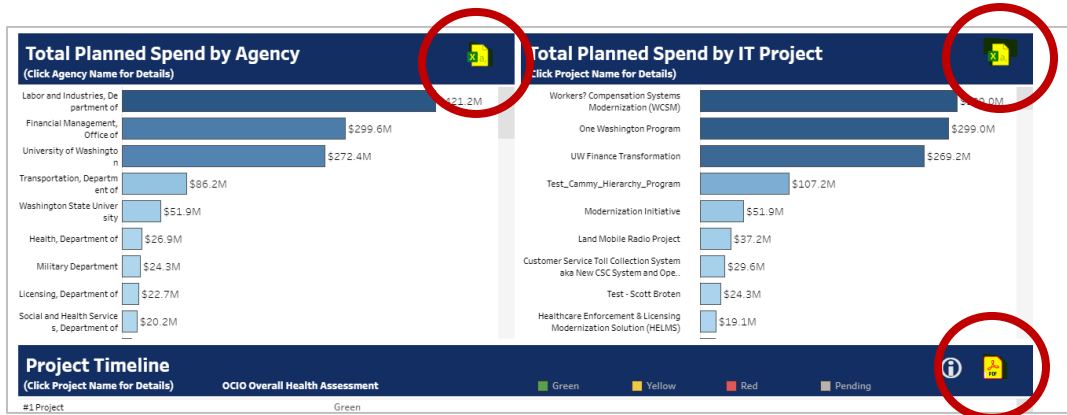
			Cancelled – Agency Cancelled – OCIO
Project Type		<field did not exist>	Gated – Non-IT Pool
Project Type		<field did not exist>	Gated - IT Pool
Project Type		<field did not exist>	Non-gated

Appendix B: Accessibility

This appendix details features that have been incorporated into the dashboard to make it more accessible by all users.

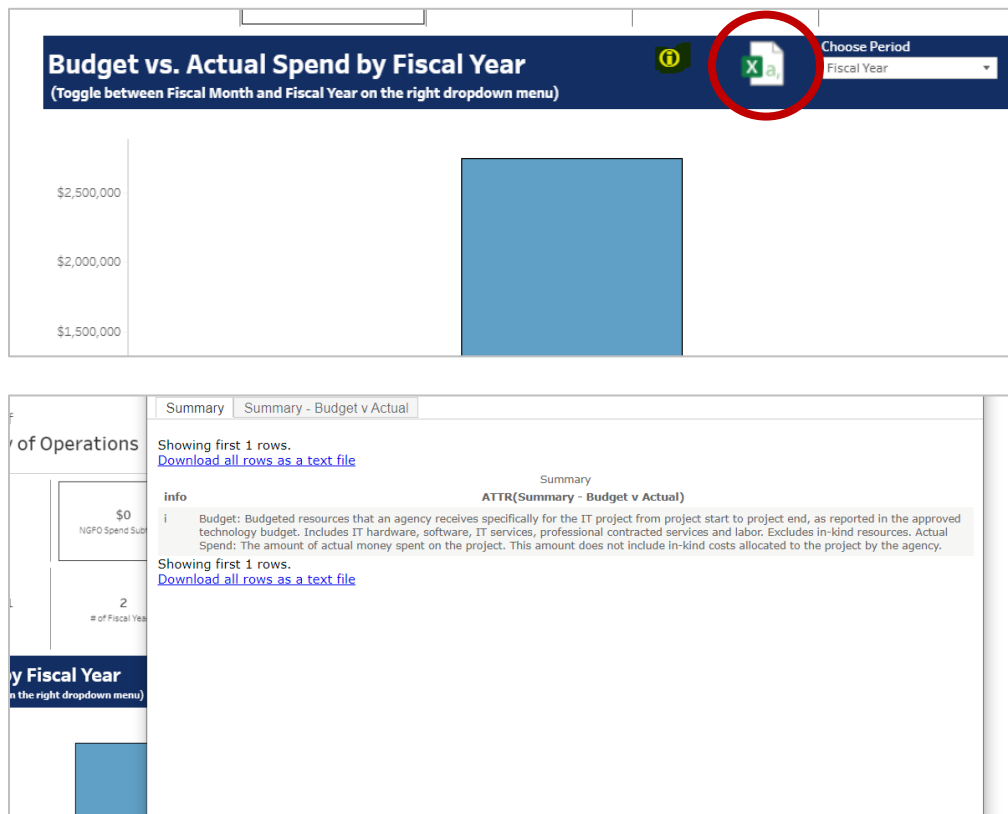
CSV and PDF Icon

CSV and PDF Icons indicate downloadable content. To interact via keyboard, tab to the item and select 'Enter'. This will bring up a dialogue box that provides alternate instructions to download the content.



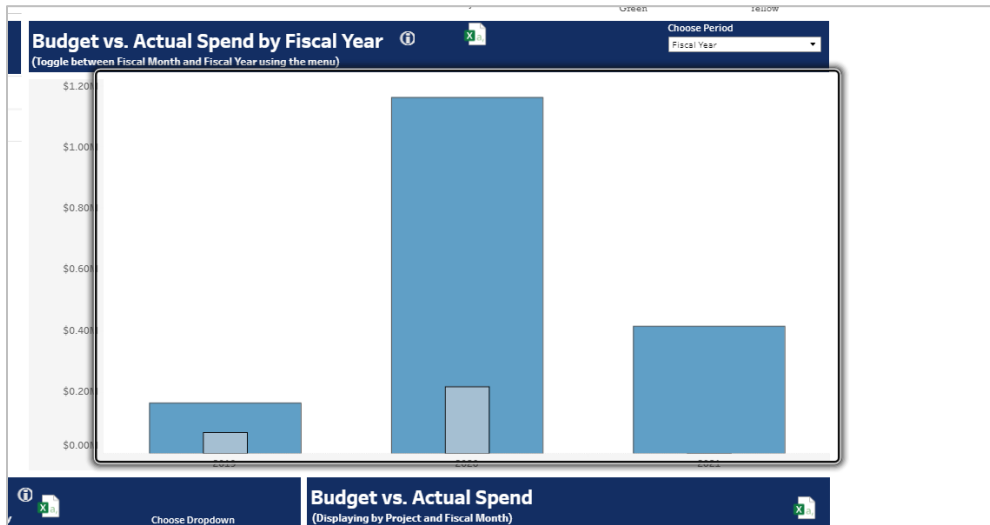
Information Icon

Information Icons provide important information on hover. This is also made accessible by using the keyboard to focus on the icon and select 'Enter'. This will bring up a window that provides the same information.



Downloading Visualizations

You can download visualizations in tabular format or learn more information by focusing and selecting 'Enter' on different elements. For example, by focusing on this bar chart and selecting 'Enter' I have a choice to download as a text file.



View Data

Showing first 6 rows.

[Download all rows as a text file](#)

YEAR(Fiscal Date)	Agency Name
2021	Accountancy, State Board of
2020	Accountancy, State Board of
2019	Accountancy, State Board of
2021	Accountancy, State Board of
2020	Accountancy, State Board of
2019	Accountancy, State Board of

Showing first 6 rows.

[Download all rows as a text file](#)