



5.0 PORTFOLIO MANAGEMENT (PFM)

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The Portfolio Management (PfM) strategy is to create and maintain an understanding of all investments (and any subsequent projects) within the State in terms of the performance, risk, service provided, and return on investment (ROI) to support prudent and well-informed investment decisions that align with the long-term goals described in the *Strategic Plan* and the *Enterprise Architecture*.

The goal of PfM is to ensure that all IT investments within the State of Hawai'i are:

- Recorded in an information repository or portfolio as they are being conceived
- Judged based on their alignment with the Strategic Plan and EA and their benefits to the state in terms of mission accomplishment and best value
- Selected/approved, delayed, or denied using the portfolio information and an assessment process

The objectives of PfM include:

1. Develop an inventory or portfolio of all current programs, investments, Steady State (SS) operations and maintenance (O&M) activities; development, modernization, or enhancement projects; or initiatives.
2. Continually add new investment "ideas" to the portfolio in an iterative manner to ensure early visibility of Departmental IT needs and requirements and the ability to address needs from a statewide perspective, as appropriate.
3. Continually add new investment proposals to the portfolio based on investment dollar thresholds and/or streamlined procurement directives.
4. Provide appropriate analytic and data mining capabilities to assess investment information in a variety of views (e.g., statewide, business or organizational/department, architectural) and to support effective IT investment review, planning, prioritization, resourcing, reporting, and approval.
5. Provide viable rationale for IT investment requests as part of the budget planning and Legislative approval cycle.
6. Eliminate or minimize ad-hoc or one-off investment solutions that do not align with the EA and the strategic direction.
7. Manage all projects with the appropriate level of rigor using a formalized project management methodology (PMM) and control and monitor all SS O&M activities by applying the formalized configuration and change management processes.

5.1 CRITICAL SUCCESS FACTORS AND PERFORMANCE MEASURES FOR THE PORTFOLIO

To be successful, the State's IT investment management processes should generally include the following elements:

- Key organizational decision makers (e.g., Executive Sponsor, CIO, CIOC, or ELC) are committed to the process and are involved throughout each project's life cycle.
- Projects are assessed jointly by program, financial, and IT managers.
- The investment management process is repeatable, efficient, and conducted uniformly and completely across the State.
- The process includes provisions for continually selecting, managing, and evaluating projects in the investment portfolio.
- Decisions are made consistently throughout the process using uniform criteria.
- Decisions are driven by accurate and up-to-date cost, risk, and benefit information.
- Decisions are made from an overall mission focus. (There is an explicit link with the goals and objectives established in the State and in the IT Strategic Plan or annual operational plans and with the EA).
- Accountability and learning from previous projects is reinforced.
- The emphasis is on optimizing the portfolio mix in order to manage risk and maximize the rate of return.
- The process incorporates all IT investments, but recognizes and allows for differences between SS and DME project types (mission critical, administrative, infrastructure) and initiatives.
- The portfolio is reviewed when economic conditions or new administrations introduce new strategies and directions.
- Individual investments are designed to clearly identify and show the cause-and-effect relationship between inputs, outputs, and outcomes.

5.2 ROLES AND RESPONSIBILITIES

The following describes the roles and responsibilities for the individuals and organizations involved in PfM and investment review, planning, prioritization, resourcing, reporting, and approval.

5.2.2 CHIEF INFORMATION OFFICER (CIO)

The CIO is responsible for:

- Establishing the methodology and procedures to capture and review portfolio information
- Ensuring PfM is developed and maintained by the designated OIMT Investment Portfolio Manager (PfMgr)

- Providing management oversight for the complete IT portfolio
- Establishing and maintaining investment thresholds for review purposes in concert with the CIOC, ELC, and IT Steering Committee
- Approving investments of less than \$100K
- Reviewing all IT investments initially as part of the Select Phase and then monitoring approved investments as part of the Control and Evaluate Phases in conjunction with the CIOC
- Making recommendations to the ELC regarding IT investment proposals
- Supporting IT investment requests (post ELC approval) through testimony before legislative committees and in discussions with legislators
- Selecting, denying, or delaying selection for investment proposals of \$100K-\$1M
- Recommending selection/denial actions to the ELC for investment proposals greater than \$1M
- Ranking/prioritizing recommended investments of \$1M for the ELC
- Appointing working groups, as needed, to facilitate more detailed investment reviews
- Participating in periodic reviews of the approved investments that are >\$100K as part of the Control and Evaluate Phases of investment management

5.3 OIMT INVESTMENT PORTFOLIO MANAGER (PFMGR)

The OIMT PFMGR is responsible for:

- Managing and maintaining the investment portfolio throughout each investment's life cycle
- Interfacing with the Executive Sponsor, OIMT, CIO, and CIOC regarding PFM and investment proposal information, developing cost estimates, and supporting business case development
- Maintaining the PFM Methodology
- Ensuring investment information is correct, complete, and appropriately updated within the investment portfolio
- Serving as the OIMT technical expert for the PFM tool
- Analyzing investment portfolio information to support the Select Phase of the investment management process
- Ensuring accuracy and appropriate completeness (depending on the stage or the investment idea) of investment proposals and the supporting business cases
- Recommending alternative solutions, application or system retirements, and potential opportunities for information sharing based on understanding of the state-wide portfolio
- Preparing reports for OIMT, CIO, CIOC, and ELC, as appropriate
- Ensuring project activities for an investment remain in alignment with the CIOC and ELC approvals as part of the Control Phase
- Scheduling periodic progress reviews for the CIOC and/or ELC with the Executive Sponsor or PM as part of the Control and Evaluate Phases
- Serving as the administrative resource to the CIOC and ELC relative to PFM issues, decisions, recommendations, and Executive Sponsor notifications

5.2.3 EXECUTIVE LEADERSHIP COUNCIL (ELC)

The ELC is responsible for:

- Reviewing CIOC investment and prioritization recommendations for all investments greater than \$1M
- Selecting, denying, or delaying CIOC investment recommendations
- Participating in periodic reviews of the approved investments that are >\$1M as part of the Control and Evaluate Phases of investment management

5.2.4 CIO COUNCIL (CIOC)

The CIOC is responsible for:

- Recognizing and reporting investments not represented in the investment portfolio to allow for follow-up by the OIMT Portfolio Manager
- Reviewing CIOC investment and prioritization recommendations for all investments greater than \$100K
- Ensuring proposed investments are aligned with Strategic Plan and EA and assessing/scoring the level of alignment
- Ensuring the risk ranking for all investments is accurate and that mitigation plans are implemented
- Recommending alternative approaches/solutions to proposed investments that leverage existing solutions and/or resources more effectively and/or represent a statewide solution
- Delaying investment proposals to allow the Organizational Investment Sponsor or Owner (Executive Sponsor) to gather additional information and/or assess alternate solution recommendations/considerations

5.4 EXECUTIVE SPONSOR

The Executive Sponsor is usually a member of the Department's or organization's leadership and is responsible for:

- Ensuring the organization follows the dollar boundaries (<\$100K; \$100K-\$1M; >\$1M) for investment actions and documentation
- Ensuring new investment proposals are appropriately documented and justified in preparation for the Select Phase of the investment management process with:
 - Accurate and current portfolio information
 - A business case
 - A risk assessment
- Ensuring the organization's existing projects (regardless of life cycle status) are complete within the OIMT investment portfolio
- Ensuring that portfolio components (i.e., projects, programs, applications, or systems) are evaluated on an annual basis and receive an appropriate level of funding to support its project life cycle stage (i.e., support SS or DME, or retirement)
- Addressing all recommendations issued by the CIOC and/or ELC relative to alternate approaches, denials, or delays and follow defined processes for the appeal/re-submission of any investment proposals, as appropriate
- Working collaboratively with the OIMT PfMgr
- Participating in progress reviews as part of the Control Phase and address any CIOC or ELC recommended corrective actions
- Participating in reviews associated with the Evaluate Phase and address any COIC or ELC recommendations and apply lessons learned, as appropriate
- Ensuring procurement requests contain CIOC or ELC approval documentation

5.5 INVESTMENT/PROJECT OR PROGRAM MANAGER (PM)

The PM is responsible for:

- Coordinating with the Executive Sponsor and PfMgr on project information
- Supporting business case development or updates for new investment proposals, as appropriate

- Updating newly approved investment information within the investment portfolio as it becomes available relative to subsequent projects
- Supporting evaluation and update of project components (i.e., projects, programs, applications, or systems) on an annual basis and recommending an appropriate level of funding for its life cycle stage (i.e., support SS or DME, or retirement)
- Ensuring project activities remain in alignment with the ELC approved investment
- Submitting CIOC and/or ELC investment approval documentation with any procurement request

5.6 STATE PROCUREMENT OFFICE (SPO)

The SPO, or its designee, is responsible for:

- Ensuring that all IT procurement requests have received investment approval from the ELC prior to the acquisition actions
- Denying IT procurement requests that do not have appropriate CIOC or ELC investment approvals (\$100K-\$1M and >\$1M respectively) and alerting the PfMgr and CIO of any denials

5.7 DEPARTMENT OF BUDGET AND FINANCE (B&F)

The B&F is responsible for:

- Ensuring that IT investments submitted as part of the budget process have been selected by the CIOC and/or ELC prior to inclusion in the Governor's budget submittal
- Alerting the CIO regarding investments submitted without selection by the CIOC and/or ELC
- Notifying the CIO about investments that were not included in the Governor's budget submittal.

5.8 INVESTMENT PORTFOLIO INFORMATION

Portfolio information requires an inventory (comprehensive list) of all Departmental investments with the ability to sort and report on investments according to a number of information attributes. The information captured for each investment must be descriptive enough to allow for evaluation and comparison to other investments already in the portfolio as well as other proposed investments. Using the captured information along with business case justifications and risk analyses, investments can be assessed from a variety of perspectives or views (e.g., compliance, LOB, departmental/organization, technology, schedule).

Table 2 summarizes the investment information that will be collected and the benefits of that collection.



Table 2: PfM Information Requirements and Benefits

PfM Information Element	Description and Benefit of Information Collection
Investment Basics	
Investment Title	Each investment is uniquely identified by a short descriptive name. This name serves as the key value in the linkage of any one investment to associated projects, architectural elements, programs, etc.
Investment Description	Each investment includes an elaborated description to provide a greater understanding of the nature of the investment.
Primary Sponsoring Organization	Each investment has a primary sponsoring organization. Capturing this information provides an organizational view or reporting capability.
Life Cycle State and Status	Each investment exists at any point in time in exactly one state in its life cycle. The values of the life cycle states can be modified as the actual life cycle is refined, but example states and statuses (non-exhaustive and in no particular order) would include: Draft, Awaiting Initial PfM Review, CIO Review Scheduled, CIO Selected, CIOC Review Scheduled, ELC Review Scheduled, CIOC Selected, CIOC Recommended, ELC Selected, etc. In addition to the life cycle state and status, a date will be kept to track when the investment entered the current state. This information helps manage the portfolio and the activities associated with PfM.
Planned and Actual Investment Start and Completion Dates	Provides dates for investment actions. Supports the overall ranking function as part of the Select Phase and transition and sequencing planning and supports the Control and Evaluate Life Cycle phases.
Business Case and Risk Analysis	At different points in an investment life cycle, some amount of business case and risk analysis is appropriate. There are information elements where a link can be made to these two documents. Templates are provided to guide the level of detail required. These two documents will be key elements of the investment portfolio during the evaluation process.
Progress Review Date	After an investment arrives at a Control state in its life cycle, periodic progress reviews are required to ensure that adequate progress is being made. A progress review date element provides the last date that the investment was reviewed. This date's visibility assists the PfM manager in ensuring that reviews are being conducted as required.
Investment Costs	
Investment Cost	Information elements are provided to capture the total cost (estimated and actual) by fiscal year. In addition, estimates and actuals are separated as being either SS costs or costs associated with DME. In addition, information elements are provided so that these SS and DME costs can be categorized by funding source (revenue bond funds, Federal funds, etc.) and funding category (Personnel Services, Equipment/Hardware, Other, etc.) Recording the funding source and category manager provides the ability to sort and analyze investments along these dimensions.

PfM Information Element	Description and Benefit of Information Collection
Programs and Projects	
Program	In most cases an investment aligns with one program. Each program has a defined set of Measures of Effectiveness (MoEs) that can be used to monitor the improvements being sought as part of the program. The information elements in the PfM provide for the linkage of an investment to multiple programs. The linkage also indicates the level of improvement expected to each MoE, providing a way to quantify the improvement to a MoE being provided by the program.
Project	Provides the projects (by project name) associated with an investment. Each project has a single investment owner.
Strategic Objectives	
Strategic Objective	A statewide set of strategic objectives are defined in the Strategic Plan and these objectives are identified to provide guidance to the evaluation of investment opportunities. Each strategic objective has set of performance measures similar in structure to those developed for individual programs. The PfM information element structure provides for the linkage of each investment back to one or more of these strategic objectives, as well as providing an indication as to the level of improvement expected for an associated MoE.
Certification & Accreditation (C&A) Status	
Certification & Accreditation (C&A) Status	An information element provided for each investment to describe and quantify the state of the investment with respect to the C&A status of any associated software systems.
Enterprise Architecture Alignment	
Enterprise Architecture	The PfM information structure provides a mechanism for linking each element to the corresponding elements of the four EAs (EBA, EIA, ESA, and ETA). This information supports the evaluation of the investment to ensure its alignment with areas of the EA that are being prioritized.

5.9 IT INVESTMENT MANAGEMENT PROCESS

Investment management is a highly integrated process that involves differing life cycles depending on what aspect or phase of the investment is being observed. For PfM, the process of Select/Control/Evaluate is a streamlined view for managing the portfolio in a holistic manner while Architect/Invest/Implement/Measure/Assess/Improve is an equally important process for managing IT investment performance. Both of these approaches align and are used effectively in the Federal government (Figure 14). For the State of Hawai'i, a combination of these two approaches was selected for use to ensure appropriate oversight for each investment.

Along with the integration of these two life cycles, a third dimension is required for effective investment portfolio management within the State. This dimension is the State's budget and appropriation process. For the State of Hawai'i, the resulting process is represented by Architect/Select/Invest/Implement/Control/Evaluate⁴ through Measurement, Assessment, and Improvement⁵. Figure 15 outlines the relational timeline of all three life cycle elements.

IT Investment Life cycle ⁴	IT Performance Improvement Life cycle
(Pre-select or Analyze)	Architect
Select	Invest
Control	Implement
Evaluate	Measure, Assess, Improve

Figure 14: Life Cycle and Management Perspectives and Alignment

⁴ Office of Management and Budget: Capital Planning Investment Control (CPIC) is a structured, integrated approach to managing IT investments.

⁵ Office of Management and Budget: IT Performance Improvement is a structured, integrated approach to enhancing investment performance.

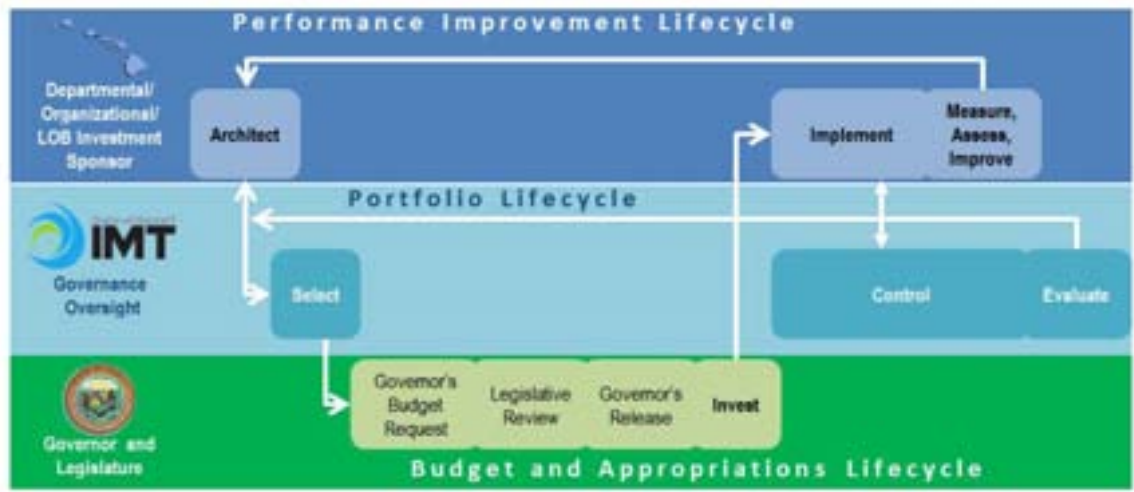


Figure 15: Investment, Improvement, and Budget and Appropriation Life cycle

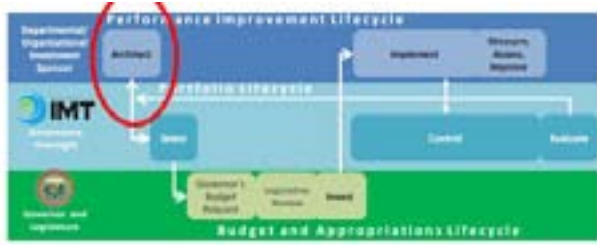
Finally, there two other very important life cycles that influence and support the management of each investment, the project management (PM) methodology and system development life cycle (SDLC). While these life cycles will be referenced in terms of the significant integration points relative to investments they will be discussed thoroughly in their own methodologies and included as appendices to the Strategic Plan. Figure 16 illustrates the applicable life cycle elements associated with an investment as well as the performance monitoring and development functions.

IT Investment Lifecycle ¹	IT Performance Improvement Lifecycle ²	Project Management Methodology	System Development Lifecycle (SDLC)	
Pre-Select or Analyze	Architected	Initiation		
		Planning & Design		
		Executing	Monitoring & Controlling	
		Closing		
Select	Invest			
Control	Implement	Initiation		Initiation
		Planning & Design		Concept
				Planning
				Requirements Analysis
		Executing	Monitoring & Controlling	Design
Development				
Closing		Test		
Evaluate	Measure, Assess, and Improve			Implementation
				Operations & Maintenance Disposition

Figure 16: Supporting Methodologies to Manage Selected Investments

The following sections describe each life cycle phase and its relationship to the budget and appropriation process in more detail.

5.10 PRE-SELECT OR ANALYZE/ARCHITECT PHASE AND PROCESS STEPS



This phase describes the timeframe required to initially architect the solution, document information about the proposed investment in the PfM tool, and prepare the business case, and perform a risk analysis depending on the estimated size of the investment. The following provides the process steps:

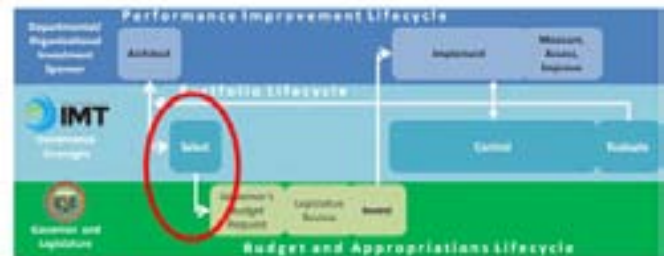
1. Executive Sponsor identifies the need for an IT investment to support a mission requirement.
2. From the identified need, ideas for IT support are architected and submitted to OIMT via the PfM tool with assistance from the PfMgr. This can be an iterative process that begins with an outline of an investment idea and grows to a fully developed investment request. (Note: Depending on the investment size and complexity, a request may be for funding to more fully architect the investment idea and alternative solutions ideas may be proposed by the PfMgr and OIMT team.)
3. Once the investment is sufficiently defined, it is submitted for review and approval/selection based on the defined thresholds <\$100K, >\$100K and <\$1M, or >\$1M.

Generally, for investments of >\$100K, portfolio information including business cases will be collected and refined three to six months prior to the beginning of the legislative session depending of the investment size, risks, and benefits. This timing allows for the appropriate selection process by the CIOC and/or ELC and will ensure the Executive Sponsor has sufficient time to complete all required budget documentation. For funded investments that are <\$100K, portfolio information will be entered into the PfM tool and then queued for review by the CIO.

5.11 SELECT PHASE

In the Select phase, all investments within the portfolio are reviewed, ranked, and then pending/approved/recommended/denied/delayed. The process steps for this phase are as follows:

1. The Executive Sponsor and/or PM update all existing (previously submitted) investments information within the portfolio
2. The PfMgr, OIMT, and CIO screens, analyzes, and assesses the total portfolio including:
 - Portfolio information, business cases, and risk analysis for new investments with regard to the description of need/proposed benefits; LOB/mission needs and service delivery requirements. (Note: As part of the screening process, alternative recommendations relative to the investments proposed solution may be offered to the Executive Sponsor.)
 - Existing investments, specifically those identified as SS, relative to end-of-life status, retirement and replacement strategy, termination, modernization and/or enhancement needs, and transition⁶ requirements to align with the Strategic Plan and EA (Note: Screening of existing investments and any forthcoming recommendations should occur early enough in the select process to allow for the Executive Sponsor to architect and create a new investment request, especially for the SS projects.)
3. The PfMgr coordinates the OIMT's and CIO's comparison and ranking of the new investment proposals against defined criteria⁷ and the overall portfolio.
4. The CIO reviews and approves or denies investments <\$100K, and the PfMgr notifies the Executive Sponsor regarding all decisions.
5. The PfMgr plans the agenda for the CIOC to review investments:
 - >\$100K and <\$1M and deny, delay, or select in a ranked order
 - >\$1M deny, delay, or recommend selection to ELC
6. The PfMgr plans the agenda for the ELC to review investments:
 - >\$1M deny, delay, or select in a ranked order
7. The CIO, supported by the PfMgr, coordinates with the Executive Sponsor and B&F regarding the inclusion of selected investments in the Governor's FY budget request based on the ranking and other known constraints (e.g., resource availability, budget guidance/expectations, or other priorities within the State).



⁶ The need for transition will carry more weight for the next five to ten years until nonconforming technologies can be retired and/or replaced or modernized.

⁷ Criteria for ranking new investments as part of the entire portfolio are available on the OIMT intranet site.

- The PfMgr, regardless of the selection, denial, delay, or recommendation decision for the investment, communicates with the Executive Sponsor or PM regarding the CIO, CIOC and/or ELC comments relative to the investment proposal. For investments that are delayed or denied, as part of selection Select Phase, the rationale for the denial or delay are communicated immediately to allow the Executive Sponsor or PM to assess the impact, adjust investment proposal documentation, and/or prepare an appeal. Investment selections are also communicated expeditiously so that budget documentation can be prepared.

5.12 INVEST PHASE



It should be noted that even though the CIOC and/or ELC have selected or recommended an investment, there are three additional decision points where an investment request may be approved or denied. The first point is with the Governor where investments are included or not included in his/her budget submittal to the Legislature. The second point is with the Legislature's Ways and Means or Finance Committees where an investment can be recommended or not recommended for legislative consideration and funding/investment. Finally, the third

decision point is with the Legislature where the investment is approved for funding or denied. Once an investment is funded by the Legislature, the investment is moved into the Implement through Control phases.

5.13 IMPLEMENT, MEASURE, ASSESS, IMPROVE, AND CONTROL PHASES

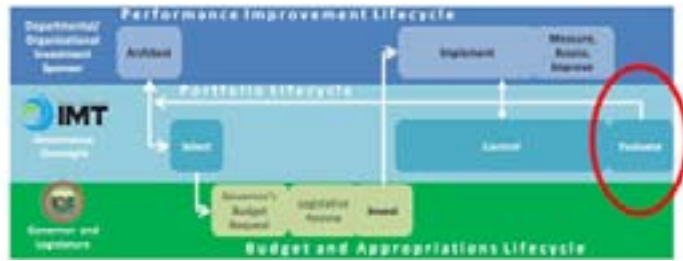
During these phases, funded investments in the portfolio are reviewed and monitored on a regular basis by the PfMgr, CIO, and CIOC and/or ELC, as appropriate, while the implementation of the investment (following a defined PM Methodology and SDLC Methodology) is performed by the Executive Sponsor and PM. The following are the process steps for these parallel phases:

- The Executive Sponsor and the assigned PM complete all implementation plans and begin all implementation activities for the investment and its subsequent DME projects.
- The Executive Sponsor and PM manages the project by continually measuring results, assessing progress against planned schedules, and improving/adjusting the implementation of the investment activity and associated projects as required to ensure the achievement of the desired results.
- The PfMgr establishes a schedule for the investment's progress or project reviews that follow the guidance provided in the OIMT Project Management Methodology or other recognized PMM. (Note: The type and frequency of the progress reviews are usually determined based on the analysis of risk, complexity, and cost that were identified when the project was selected (and subsequently funded through the budget approval process). These reviews may coincide with investment events such as achievement of key deliverables.
- The CIO, and as appropriate, the CIOC and/or ELC, monitor the progress of each investment activity against planned schedules and spend plans on a regular basis in conjunction with the Executive Sponsor and/or PM as the implementation occurs through periodic reviews. The CIO, CIOC, and/or ELC recommended course corrections or corrective actions if progress is not on track (e.g., stated milestones are not being met, expenditure of funding is significantly over or under planning estimates, risk mitigation plans are not effective, additional risks have been identified).
- If an implementation project is late, over cost, significantly under cost, or not meeting performance expectations, the CIO, CIOC and/or ELC will schedule a progress review and will make the decision whether the investment should be continued, modified, or canceled. Any CIOC and/or ELC recommendations and subsequent actions are immediately conveyed to the Executive Sponsor or PM to mitigate the effects of changes in risks and costs.
- The PfMgr will ensure all actions and recommendations are updated within the portfolio.



Once an investment or project within an investment is fully implemented, it becomes a SS O&M Activity and is moved to the Evaluate Phase.

5.14 EVALUATE PHASE



In the Evaluate phase, the entire portfolio of investments and specifically the fully implemented or SS activities and any canceled investments undergo additional review in terms of actual or expected results. The following are the process steps for this phase:

1. The PFMgr and CIO continually evaluate the portfolio on mission performance, spending perspectives, and other defined objectives and measures and subsequently identify and recommend to the Executive Sponsor, CIOC, and/or ELC any changes or modifications to the portfolio and any specific SS activity that may be needed (e.g., activities nearing end-or-life and/or might require modernization or enhancement or retirement).
2. The PFMgr and CIO review any cancelled investments in detail for lessons learned and share this analysis with the CIOC and/or ELC, as appropriate.
3. The PFMgr and CIO implement revisions in the State's PFM processes based on lessons learned and provide input into the following year's investment identification and selection activities.

5.15 PFM AND OTHER IT GOVERNANCE AND MANAGEMENT ACTIVITIES

As noted above, PFM is tightly integrated with the State's defined IT/IRM governance processes and with project or program management in general. Within the State of Hawai'i, each of these activities has defined roles and responsibilities with specific goals and objectives, but they share an overarching focus on effectively:

- Identifying and securing funding for needed IT investments and their projects or programs
- Ensuring alignment with the Strategic Plan and EA and other processes (e.g., procurement, budget guidance)
- Monitoring and managing all investment activities based on estimated versus actual spend plans, risk identification and mitigation, delivery against milestones and deliverable schedules, and achievement of defined benefits
- Taking corrective actions, as appropriate

- Managing each IT investment and any subsequent projects or programs throughout their life cycle
- Documenting the processes required for effective process maintenance
- Continually improving processes associated with IT investments planning, tracking, and management
- Identifying opportunities for continuous improvement and applying lessons learned judiciously

Integration of the IT portfolio and the selection of IT investments are tightly integrated with the State's budget process. The selection of money to invest in IT and the integration of this to either particular programs or to line items in the State's budget are to be synchronized. This will help ensure the money is there to start a new IT investment and that the money is reallocated to other budget needs at the proper time, so as not to leave a service with either two working investments doing duplicate work, or leave the new investment non-operational and the terminated investment shut off with citizens' service in a degraded state.

5.16 INVESTMENT PORTFOLIO MANAGEMENT TOOL SUITE

The information gathered as part of the PFM provides the opportunity for the CIO, CIOC, ELC, Departments, B&F, Executive Sponsors, PMs, legislative units, and other stakeholders to view the portfolio from many perspectives to make informed decisions about the State's existing and proposed IT investments. The information will be maintained in an automated tool⁸ to facilitate tracking, analysis, and reporting against the numerous views including:

- Total portfolio view
- Departmental/organizational view
- SS view
- DME view
- Planned and actual start/completion data view
- Investment life cycle (Select, Control, Evaluate) view
- Progress review, status view

⁸ While an integrated tool is being selected and acquired, the OIMT and the PFMgr will utilize the Enterprise Assessment Database (EAD) to capture portfolio information.