Indian Health Service

Capital Planning and Investment Control (CPIC) – Comprehensive IT Budget Formulation and Execution Using Planview and Microsoft Power BI

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AUGUST 2024

AGENDA

- Requirements for Compliant IT Budget Formulation & Execution.
- Overview of Planview Portfolio & Project Management Application.
- Overview of Microsoft Power BI Financial Dashboard Data Input Sources.
- Live Demo of Planview and Microsoft Power BI Financial Dashboard.

Requirements for Compliant IT Budget Formulation & Execution

- The Whitehouse Office of Management and Budget (OMB) requirements.
  - Circular A-11, IT Investments
  - FITARA TBM Cost Pools, IT Towers, and Business Solutions Layers.
- The Federal Budget Cycle Calendar
  - Requires a minimum of 30 months of lead time to complete all the IHS, HHS, OMB, and Congressional budget processes.
- Development of Budget Operating Plan for Execution & Tracking.

TBM Summary View

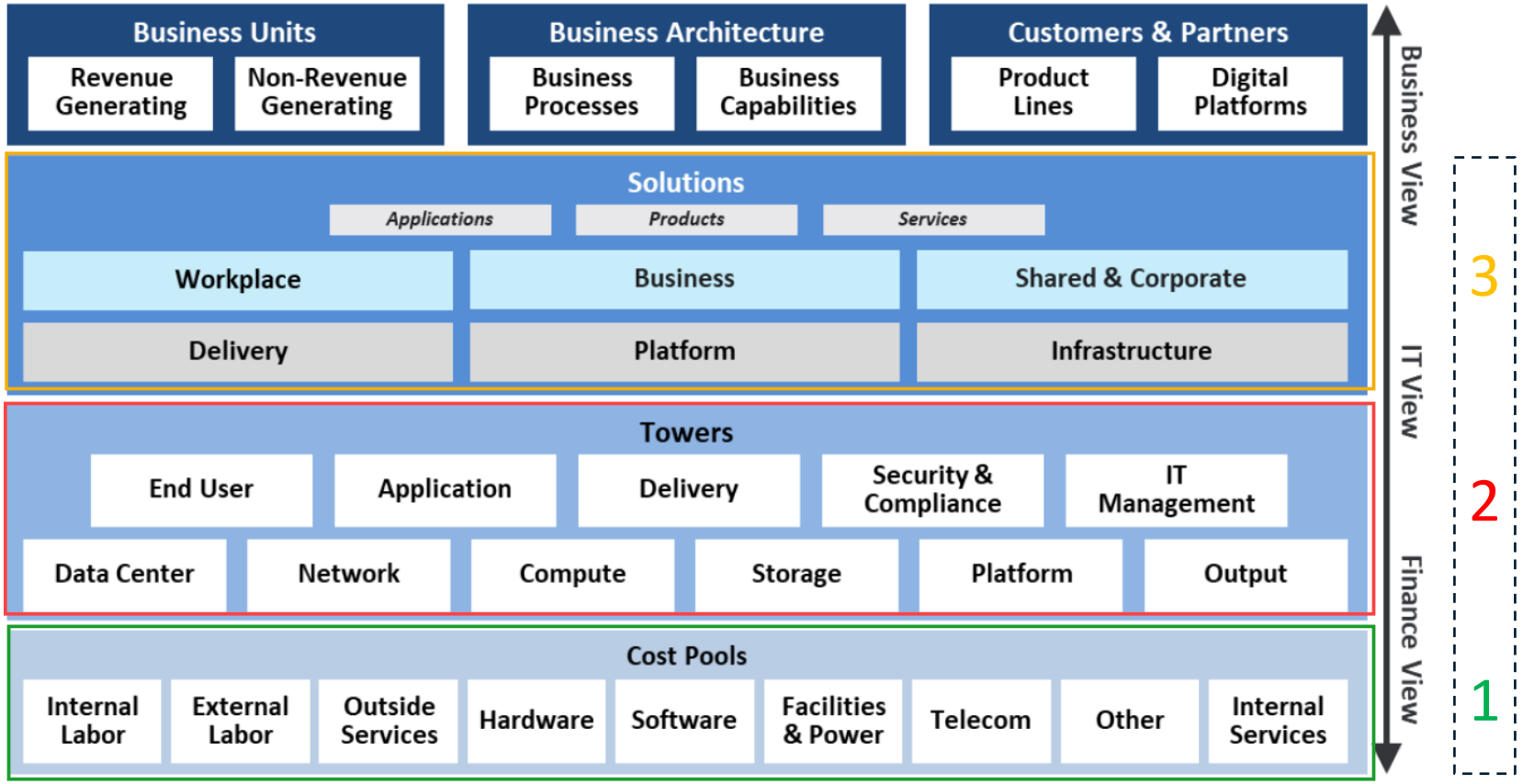

Figure 1: The TBM Taxonomy (Summary View)

Overview of Planview Portfolio & Project Management Application

- Live overview of Planview.

Overview of Microsoft Power BI Financial Dashboard Data Input Sources

- OIT Microsoft Power BI Financial Dashboard ingests data inputs from the following sources:

Planned Spend Data Derived from Planview:

- Planview Strategies SQL Table.
- Planview Financial Details SQL Table.

Actual Spend Data Derived from FBIS:

- FBIS Funds Availability Report (auto-run -> emailed -> MS Power Automate extracts file to SharePoint folder.
- FBIS Requisition Register Report (same processing as above).
- FBIS DocView Report (same processing as above).
- FBIS Budget Execution Report (same processing as above).

Live Demo of Planview and Microsoft Power BI Financial Dashboard

- Demo the OIT Microsoft Power BI Financial Dashboard.

Thank You for Attending

Questions?

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