Commonwealth of Virginia

General Training for Primavera Portfolios

Version 1, Primavera Portfolios 7.5 SP2

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Executive Summary

This document is intended as a quick introduction to CTP and how to get a quick grasp of the navigational constructs and their use.

Icons (Submit Reset New Spelling)

All the icons in this section will explained from the perspective of Form usage. Though the actions of the individual selections don't change between modules, their availability does.

Submit(Submit)

The action taken is synonymous with the concept of 'Save' in Microsoft applications. If the user should open a form and proceed to add or modify information this button will become active. Once a user makes all the required changes they can save the data using this button.

Reset(Reset)

The action taken is one resets all the changes a user has made to the data in a particular form since the last "Submit".. Another way to think it might be as 'undo', but at the form level.

New(New)

This button is used when a user wishes to create a new project or procurement. If the user presses this button then a blank form is presented ready for data entry. This button will appear only on specific forms, particularly those that are the first form in a process flow in the ITIM Select/Pre-Select phase.

Spelling(Spelling)

Not available in the 64 bit used by CTP for version 7.5.2 Primavera Portfolios. When available, it will allow the user to spell check the data entered on a particular form.

Print( )

Pressing this button will allow the user to print the current form and its contents.

Email( )

This button will allow the user to email a URL link of the current form, tab, and item to another Primavera Portfolios user. This capability greatly simplifies the steps necessary to communicate with another user about a specific piece of information.

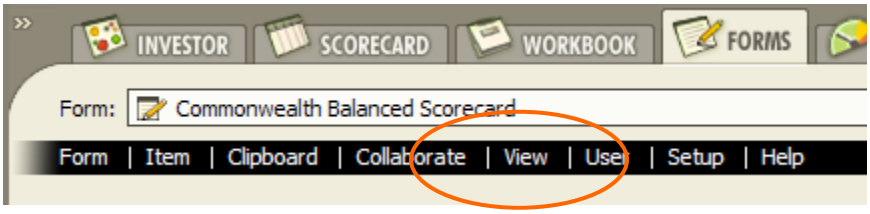
Knowledge( )

Once knowledge has been provided the form will notify the user of its existence using the "light bulb' ( ) on the upper right portion of the browser. The location is shown in the example below. Please reference 'Knowledge' on page '21'.

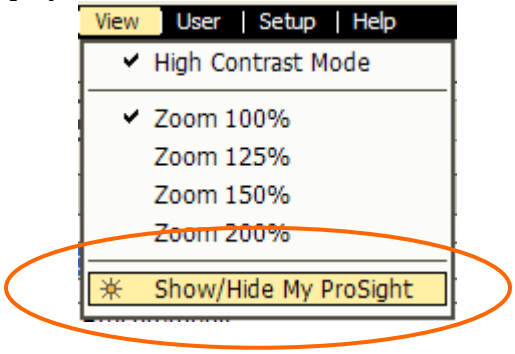
My Process Navigation

In this example we will be opening the top level PMD Processes.

- Click on “View” button on the Primavera Portfolios Menu Bar

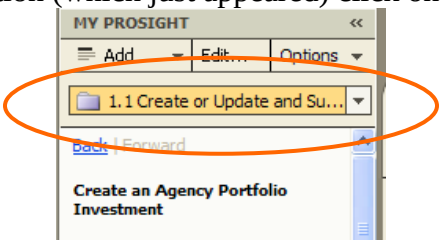


- Click on “Show/Hide My ProSight” from the Menu List “My ProSight” will be displayed on the left-hand side of the Screen

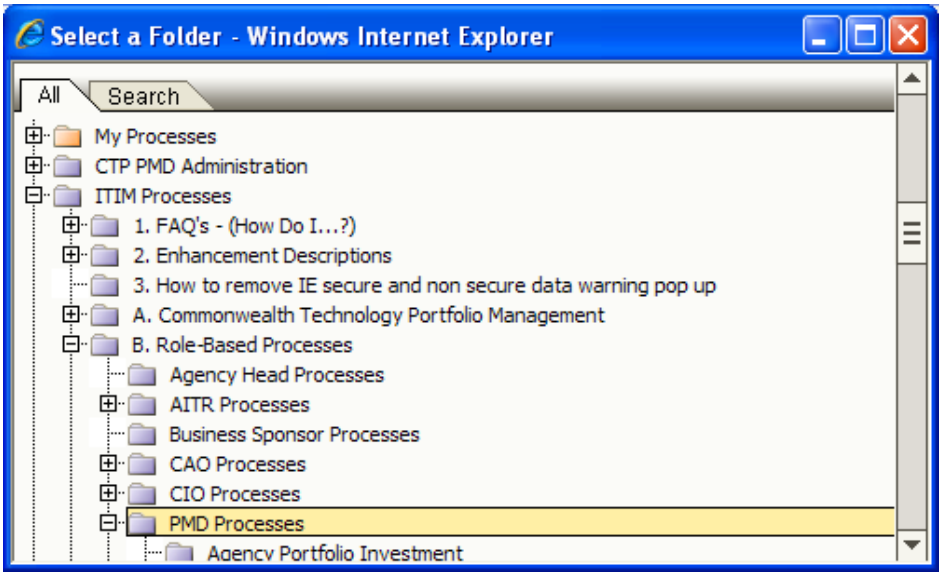


Access Project Business Alignment Form:

- In My ProSight Section (which just appeared) click on the drop- box option



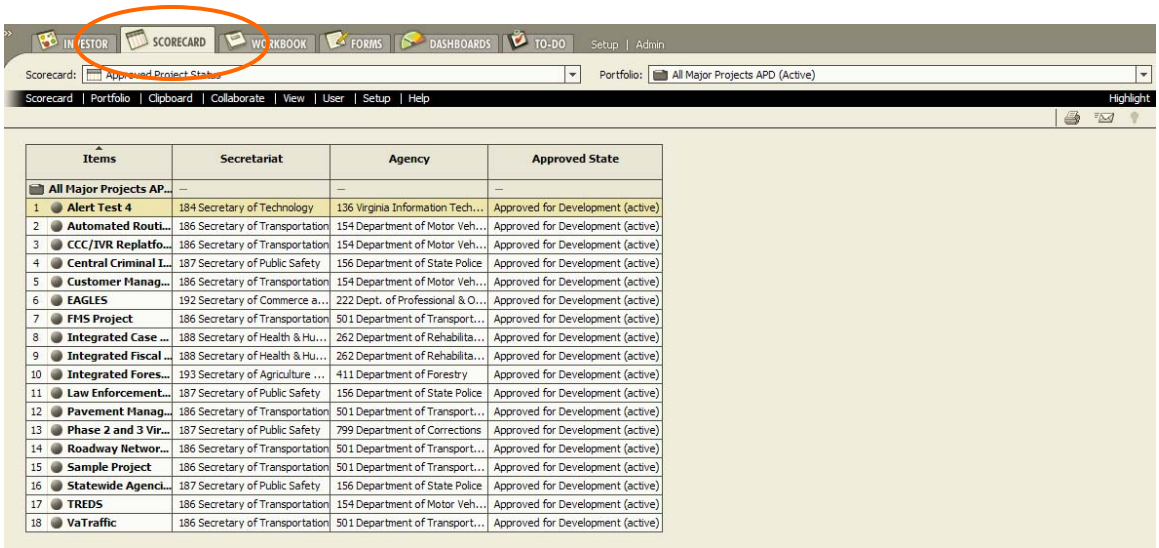
- From the drop-box select the following:
- Navigate to the following and select the highlighted option



Scorecard Selection

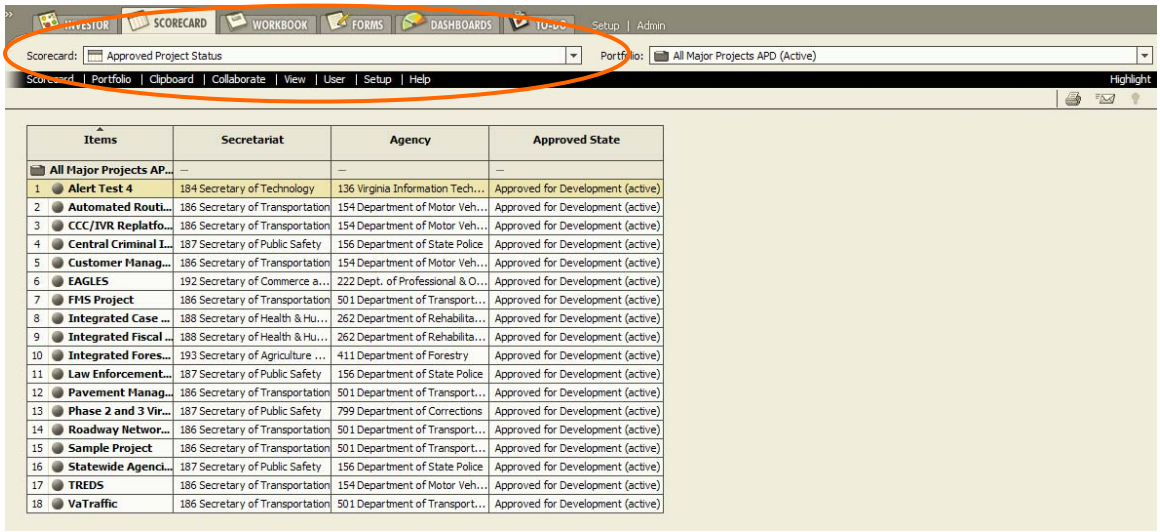
1) Select the "

" tab as shown below.



	Items	Secretariat	Agency	Approved State
	All Major Projects AP...	–	–	–
1	Alert Test 4	184 Secretary of Technology	136 Virginia Information Tech...	Approved for Development (active)
2	Automated Routi...	186 Secretary of Transportation	154 Department of Motor Veh...	Approved for Development (active)
3	CCC/IVR Replatfo...	186 Secretary of Transportation	154 Department of Motor Veh...	Approved for Development (active)
4	Central Criminal I...	187 Secretary of Public Safety	156 Department of State Police	Approved for Development (active)
5	Customer Manag...	186 Secretary of Transportation	154 Department of Motor Veh...	Approved for Development (active)
6	EAGLES	192 Secretary of Commerce a...	222 Dept. of Professional & O...	Approved for Development (active)
7	FMS Project	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)
8	Integrated Case ...	188 Secretary of Health & Hu...	262 Department of Rehabilita...	Approved for Development (active)
9	Integrated Fiscal ...	188 Secretary of Health & Hu...	262 Department of Rehabilita...	Approved for Development (active)
10	Integrated Fores...	193 Secretary of Agriculture ...	411 Department of Forestry	Approved for Development (active)
11	Law Enforcement...	187 Secretary of Public Safety	156 Department of State Police	Approved for Development (active)
12	Pavement Manag...	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)
13	Phase 2 and 3 Vir...	187 Secretary of Public Safety	799 Department of Corrections	Approved for Development (active)
14	Roadway Networ...	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)
15	Sample Project	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)
16	Statewide Agenci...	187 Secretary of Public Safety	156 Department of State Police	Approved for Development (active)
17	TREDS	186 Secretary of Transportation	154 Department of Motor Veh...	Approved for Development (active)
18	VaTraffic	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)

2) Now we are going to select a Scorecard. Select the "▼"as shown below.



	Items	Secretariat	Agency	Approved State
	All Major Projects AP...	–	–	–
1	Alert Test 4	184 Secretary of Technology	136 Virginia Information Tech...	Approved for Development (active)
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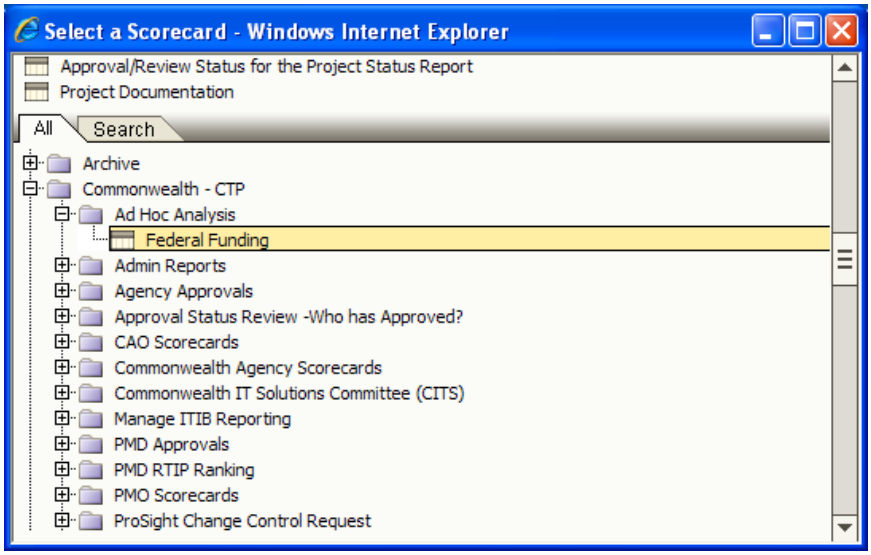
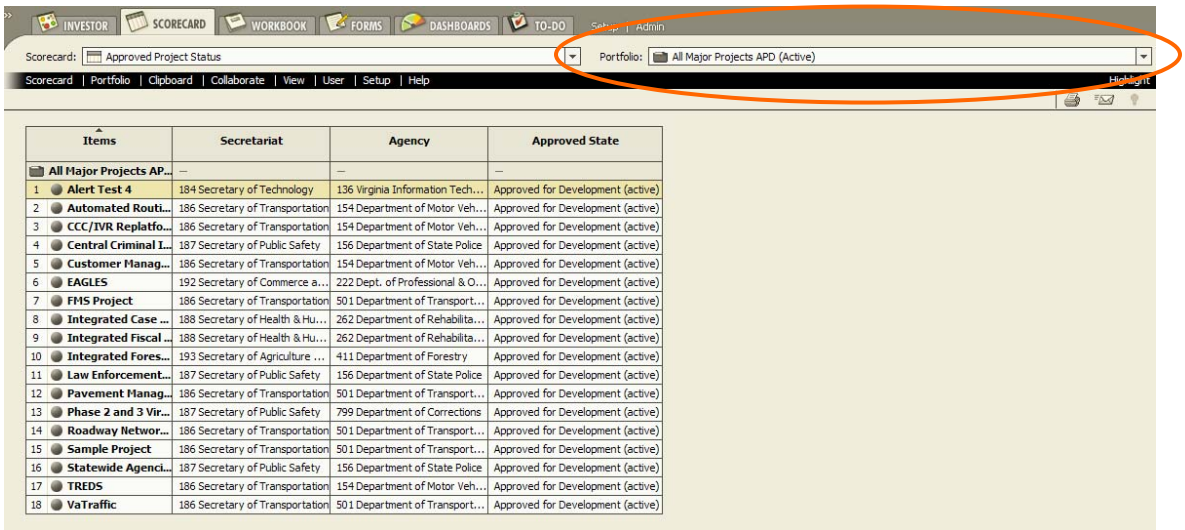
18	VaTraffic	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)

3) The window below will appear. This example we have selected the "Federal Funding" Scorecard.



4) Now we are going to select a Portfolio. Select the "▼" as shown below



	Items	Secretariat	Agency	Approved State
	All Major Projects AP...	–	–	–
1	Alert Test 4	184 Secretary of Technology	136 Virginia Information Tech...	Approved for Development (active)
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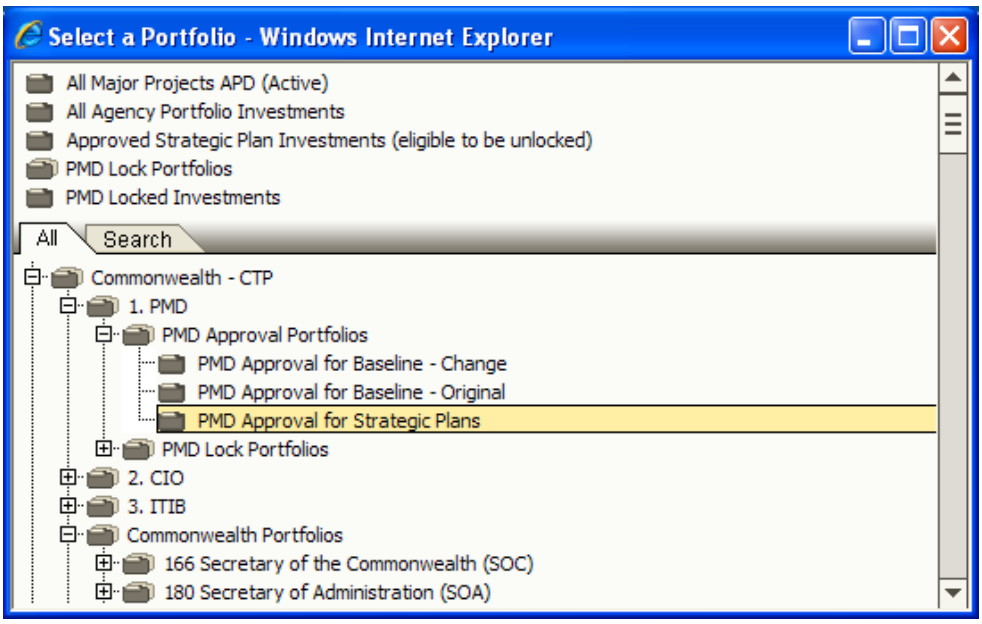
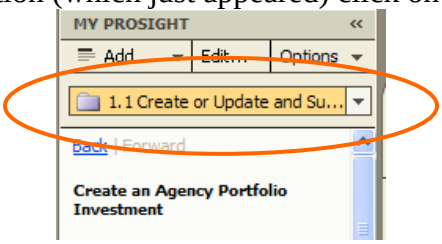
17	TREDS	186 Secretary of Transportation	154 Department of Motor Veh...	Approved for Development (active)
18	VaTraffic	186 Secretary of Transportation	501 Department of Transport...	Approved for Development (active)

5) The window below will appear. In this example we have select the "PMD Approval for Strategic Plans" portfolio

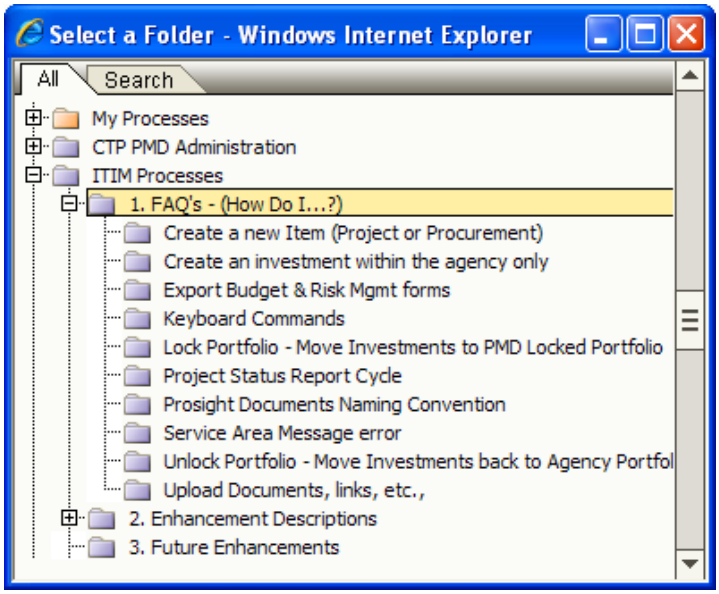


ITIM Processes

- In My ProSight Section (which just appeared) click on the drop- box option

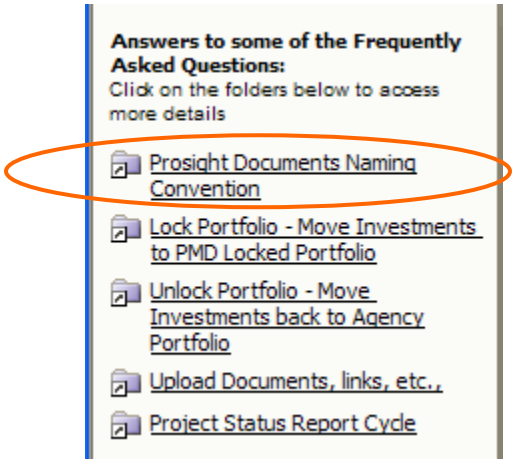


- From the drop-box select the following:
- Navigate to the following and select the highlighted option

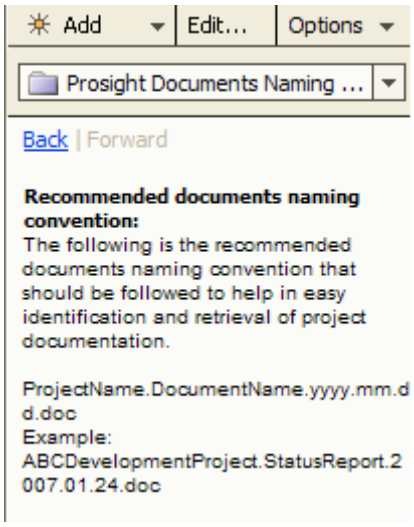


Naming conventions

Next you should see the selections in the figure below. Please click on the selected link.

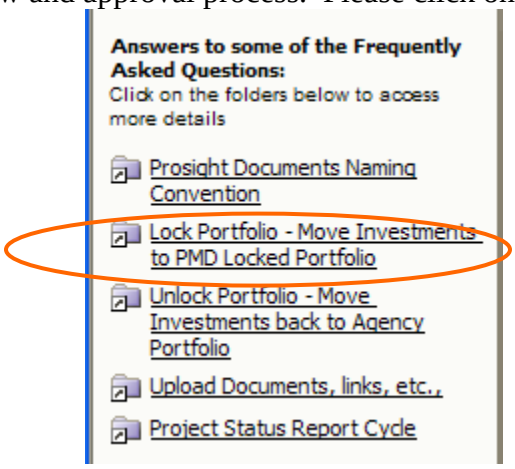


Now the user is presented with a dialog informing them of the recommended naming convention.

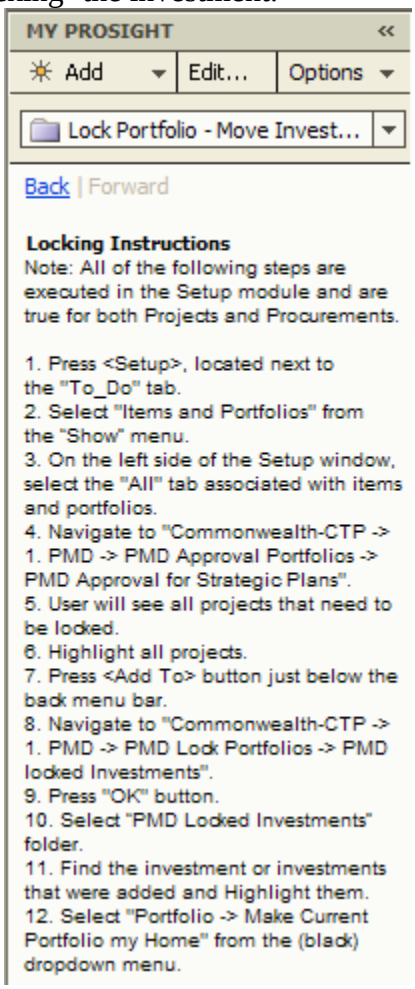


Lock Portfolio

In this example the user will see the steps the PMD Analyst takes to 'lock' an investment during the PMD review and approval process. Please click on the selected link below.

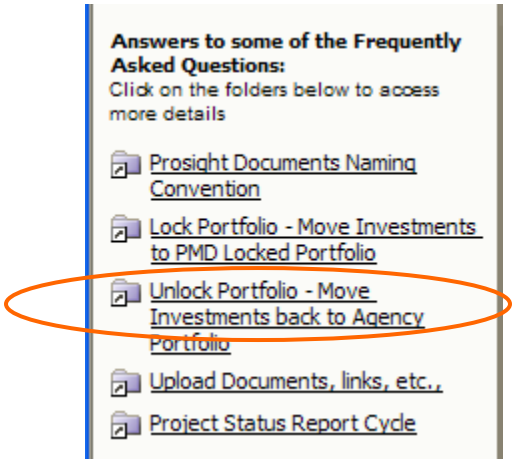


Next you should see the steps in the figure below. These steps guide the PMD Analyst through the procedure of 'locking' the investment.

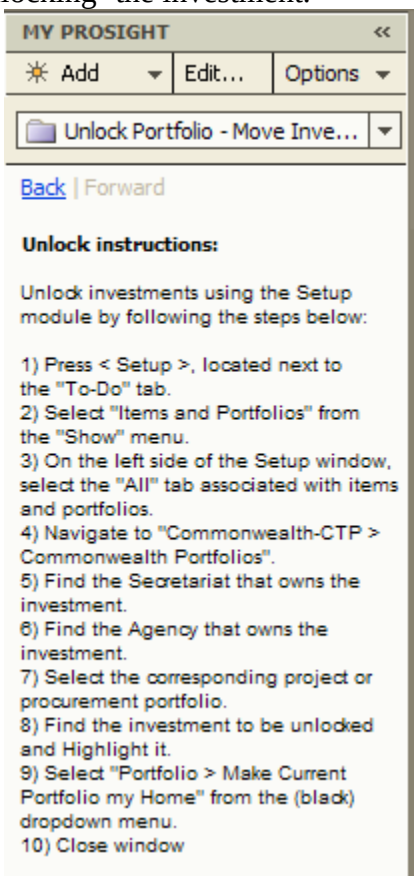


Unlock Portfolio

In this example the user will see the steps the PMD Analyst takes to 'unlock' an investment after the PMD review and approval process. Please click on the selected link below.

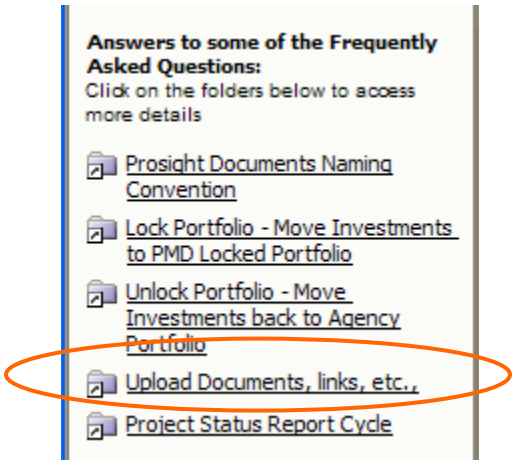


Next you should see the steps in the figure below. These steps guide the PMD Analyst through the procedure of 'unlocking' the investment.

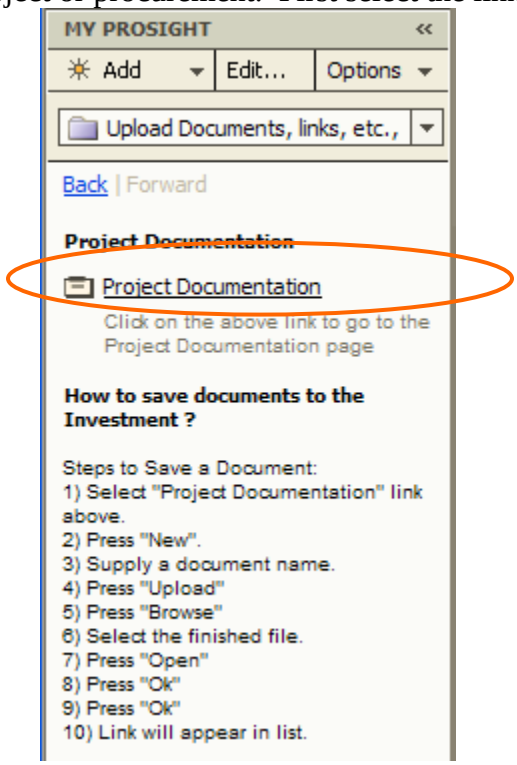


Upload Documents

In this example the user will see the steps the PMD Analyst takes to upload a document and attached it to a particular project or procurement. Please click on the selected link below.

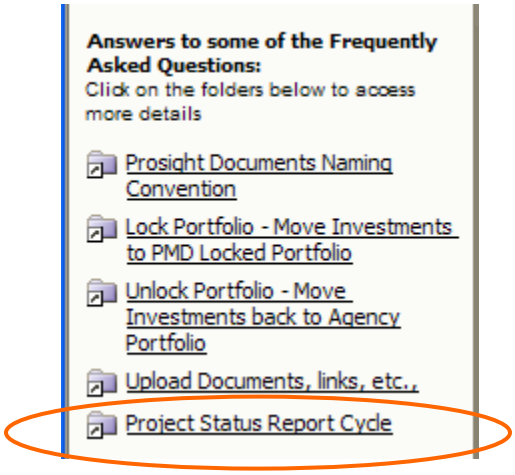


Next you should see the steps in the figure below. First select the link below, then follow the steps that guide the PMD Analyst through the procedure of uploading documentation relative to a particular project or procurement. First select the link below, then



Project Status Report Cycle

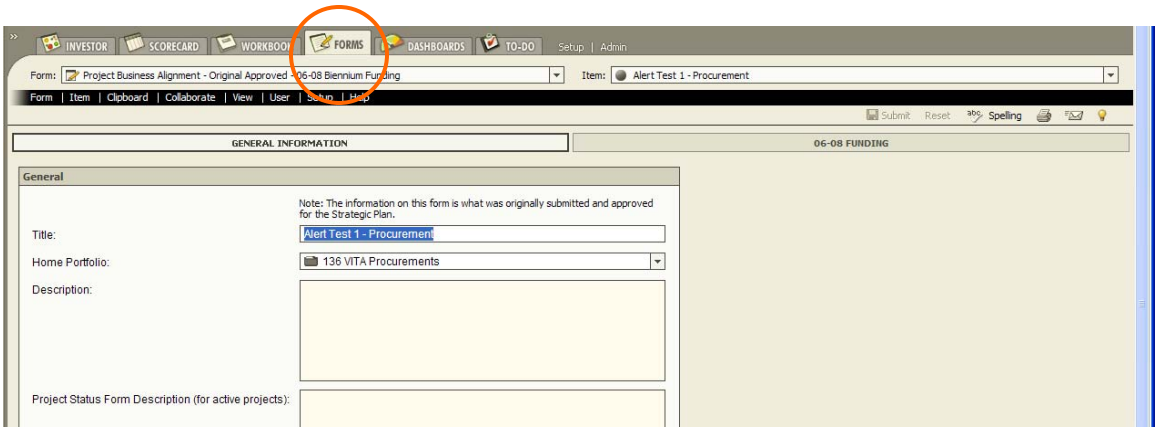
In this example the user will be shown the date driven milestones by which the Project Status Report is approved on a monthly basis. Please click on the selected link below.



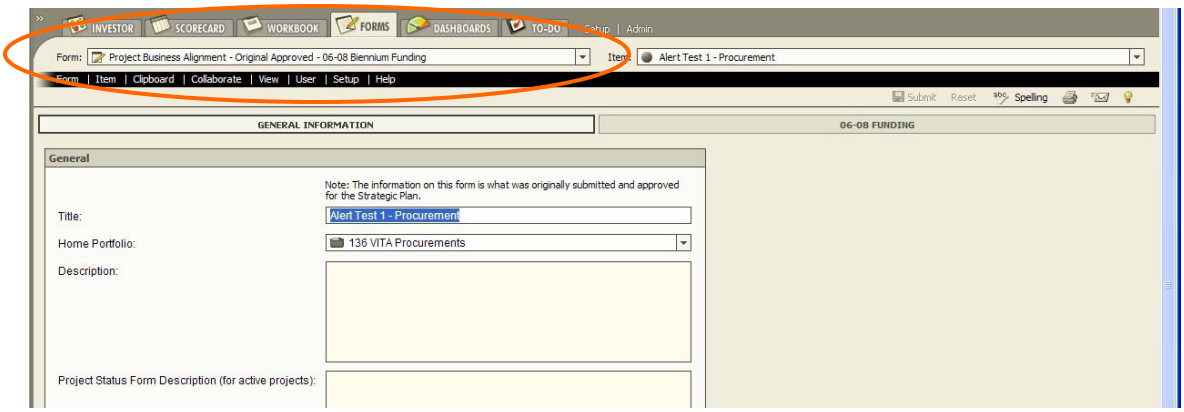
The figure below shows the user the date driven milestones by which the Project Status Report is approved on a monthly basis. Please click on the selected link below.

Form Selection

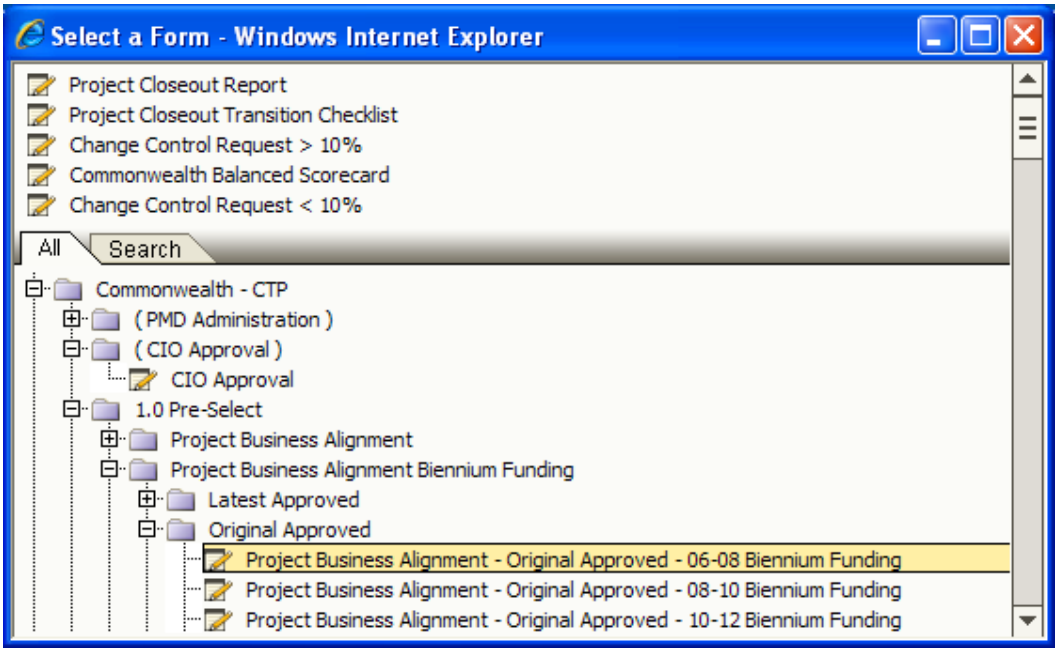
1) Select the " " tab



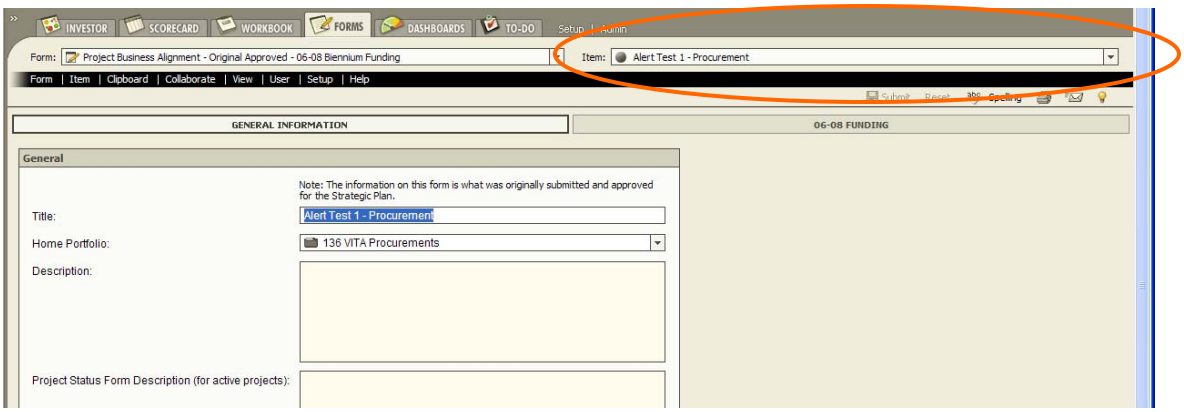
2) Now we are going to select a Scorecard. Select the " "as shown below



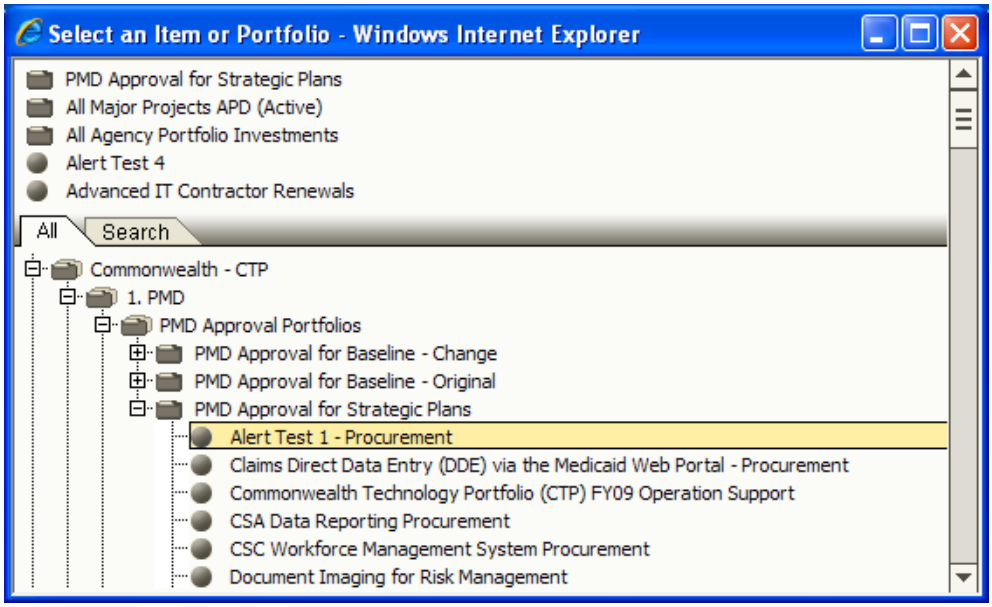
3) Now we are going to select a Form to view. Select the "▾"as shown below.



4) Now we are going to select an item to view. Select the "▼"as shown below.



5) Select an item, in this example we have selected the "Alert Test 1 – Procurement" item. Every Agency has a project and a procurement portfolio. Notice other agencies are grayed out; this denotes you only have read access to those portfolios.



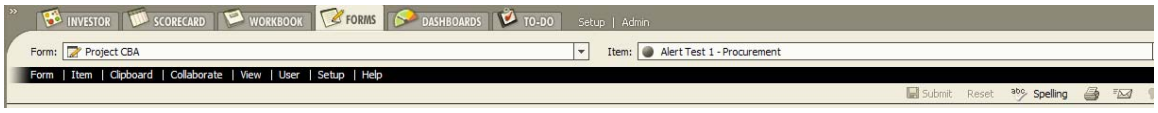
Mandatory Required Field Enforcement:

In forms, fields (categories) designated with an asterisk (*) have a red squiggle line underlining them to remind the user this category needs to be filled out. For all strategic planning forms, and for those project management forms mandated by *Code of Virginia* and by project complexity, submission will not be allowed until the field has an entry.

Enforcement is by tab only, not the complete form, i.e. you must fill in all of the required fields on any tab you modify on the form in order to submit it. The first time you enter a form you can enter and submit by tab. Subsequently, if you go back to the form and make a change on a form, only the tab you modified will enforce required fields to be filled out. Enforcement is for category fields, not table cells. This ensures critical data is not missing from agency submissions.

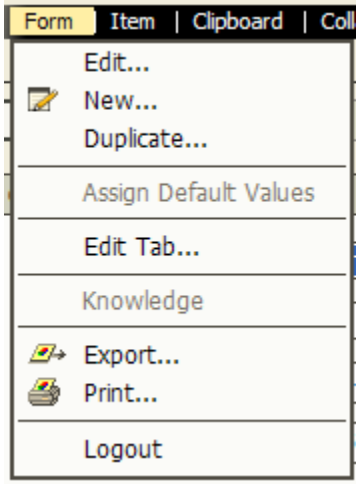
Menu Bar

The Menu bar is a horizontal black line running left to right across the top half of the browser window as shown in the figure below.



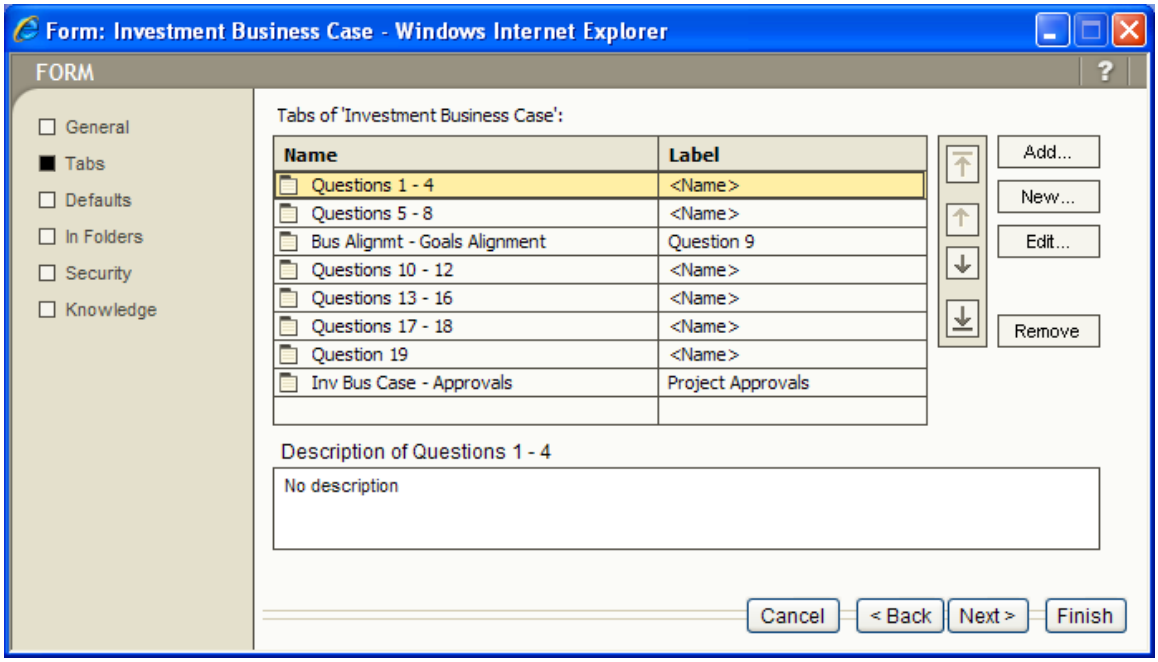
It contains options available to certain users facilitating the performance of their activities.

Forms



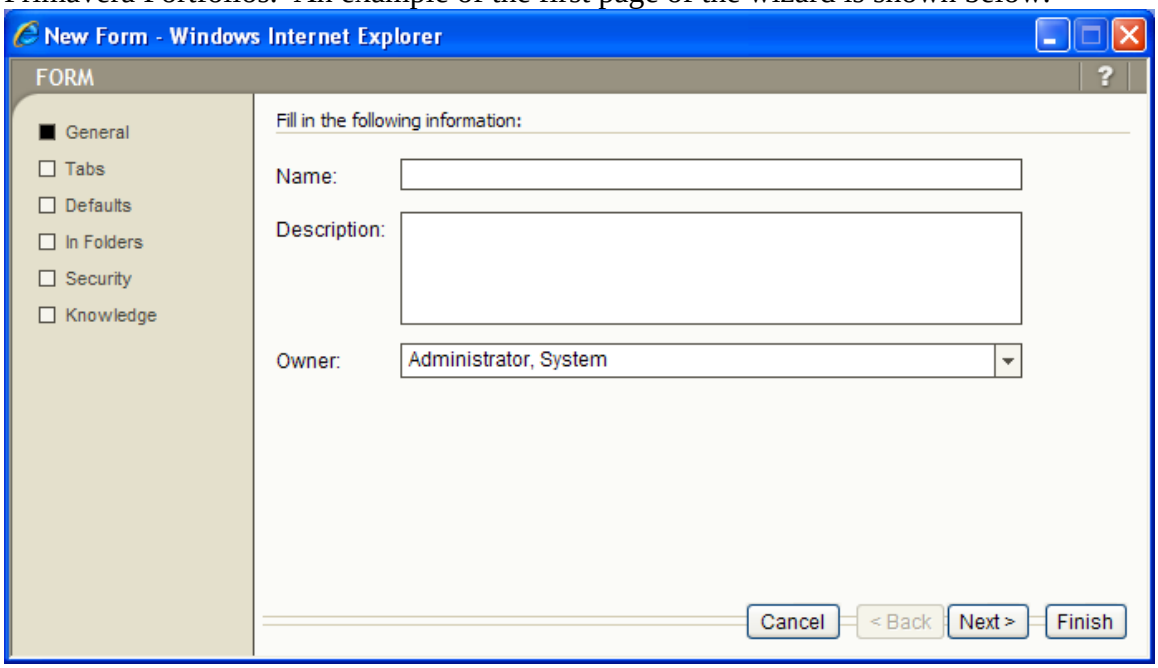
Edit

This option allows the user to view the list of Tabs used to build the form. An example of the window used is shown below.



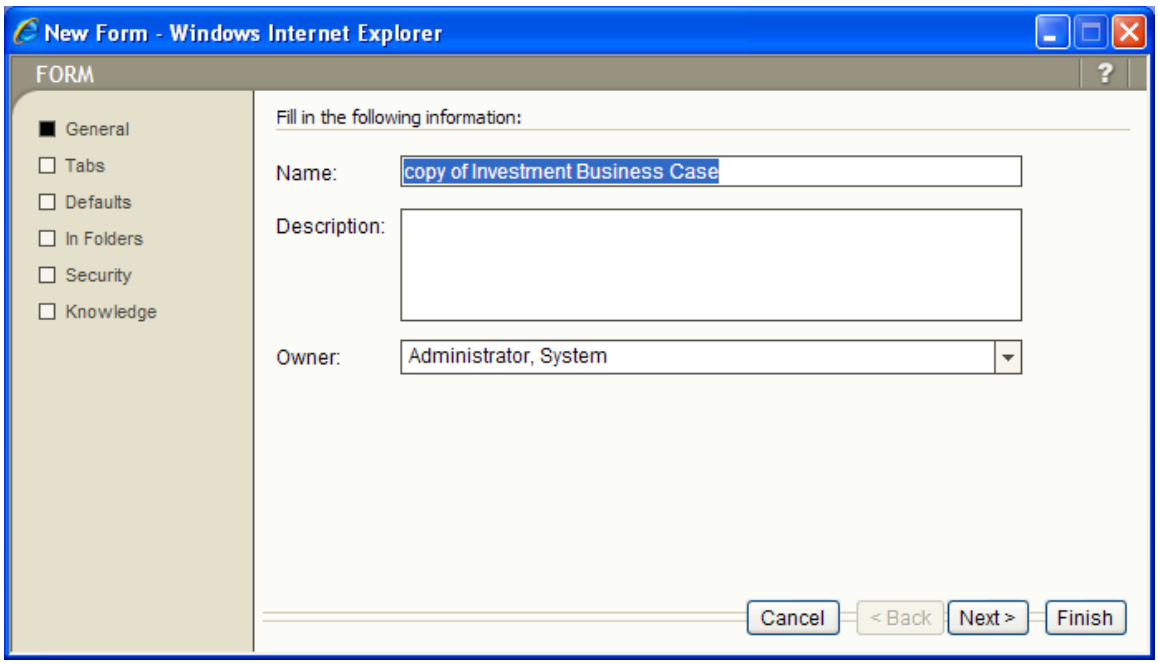
New

This option allows a administrator to create a new form using the wizard provided by Primavera Portfolios. An example of the first page of the wizard is shown below.



Duplicate

This option allows the administrator to create a duplicate of the form they are currently viewing. Please keep in mind this only duplicates the form entity. The individual entities used to 'build' the form are not duplicated but reused. An example of the window used is shown below.

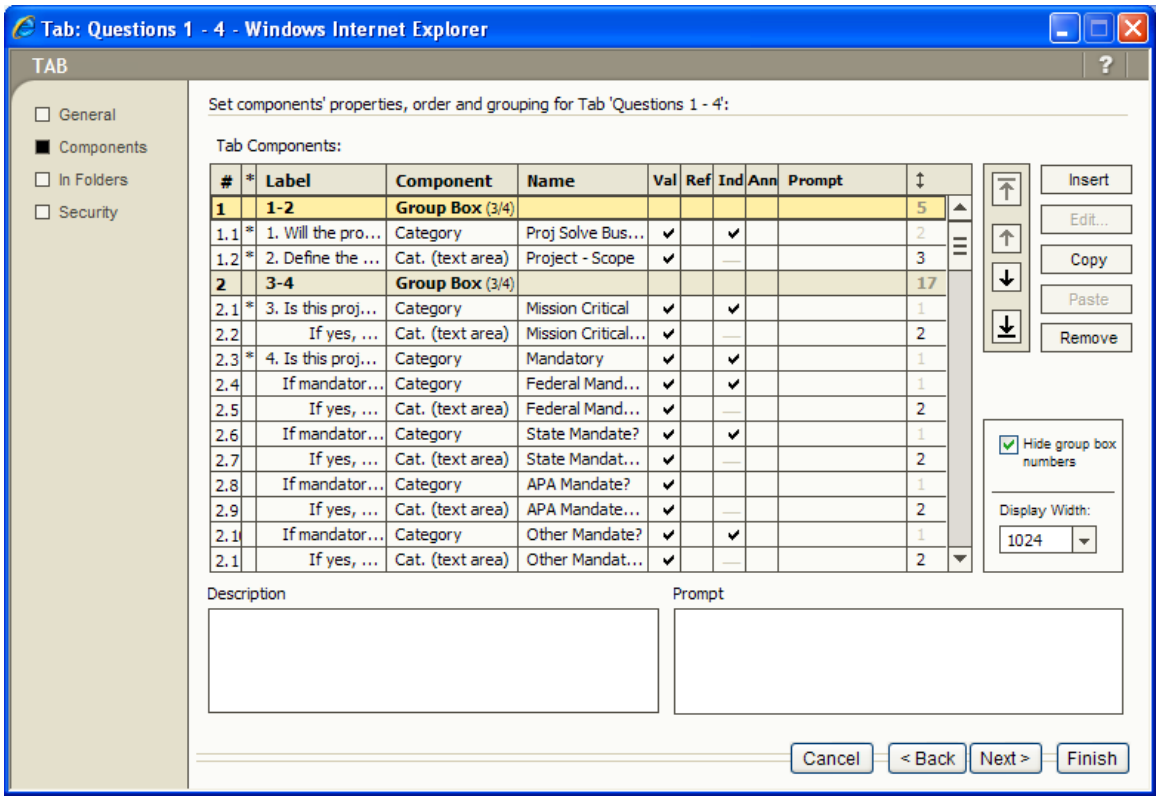


Assign Default Values

This option allows the administrator to edit the default values of certain categories on a Primavera Portfolios Form. In order for this option to be available the form itself must have the (New) button active allowing it to create new Items. This button is located in the upper right of the browser as shown below.

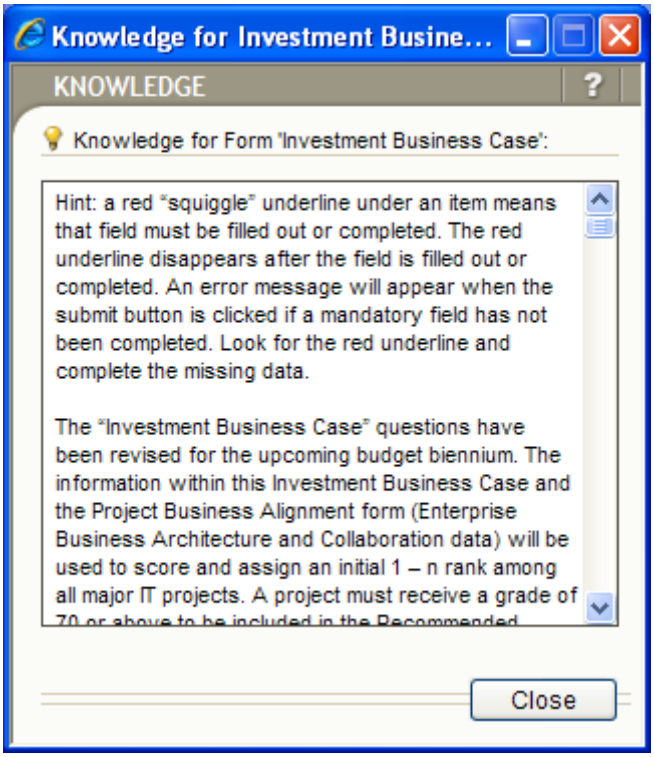
Edit Tab

This option allows the user to view the construction of the tab they are currently viewing. An example of the window used is shown below.


Tab: Questions 1 - 4 - Windows Internet Explorer
TAB
General
Components
In Folders
Security
Set components' properties, order and grouping for Tab 'Questions 1 - 4':
Tab Components:
* Label Component Name Val Ref Ind Ann Prompt
1 1-2 Group Box (3/4) 5
1.1 * 1. Will the pro... Category Proj Solve Bus... 2
1.2 * 2. Define the ... Cat. (text area) Project - Scope 3
2 3-4 Group Box (3/4) 17
2.1 * 3. Is this proj... Category Mission Critical 1
2.2 If yes, ... Cat. (text area) Mission Critical... 2
2.3 * 4. Is this proj... Category Mandatory 1
2.4 If mandator... Category Federal Mand... 1
2.5 If yes, ... Cat. (text area) Federal Mand... 2
2.6 If mandator... Category State Mandate? 1
2.7 If yes, ... Cat. (text area) State Mandat... 2
2.8 If mandator... Category APA Mandate? 1
2.9 If yes, ... Cat. (text area) APA Mandate... 2
2.1 If mandator... Category Other Mandate? 1
2.1 If yes, ... Cat. (text area) Other Mandat... 2
Insert
Edit...
Copy
Paste
Remove
Hide group box numbers
Display Width:
1024
Description
Prompt
Cancel
< Back
Next >
Finish

Knowledge

This option allows the user to view information helpful to the usage of the page. An example of the window provided is shown below.

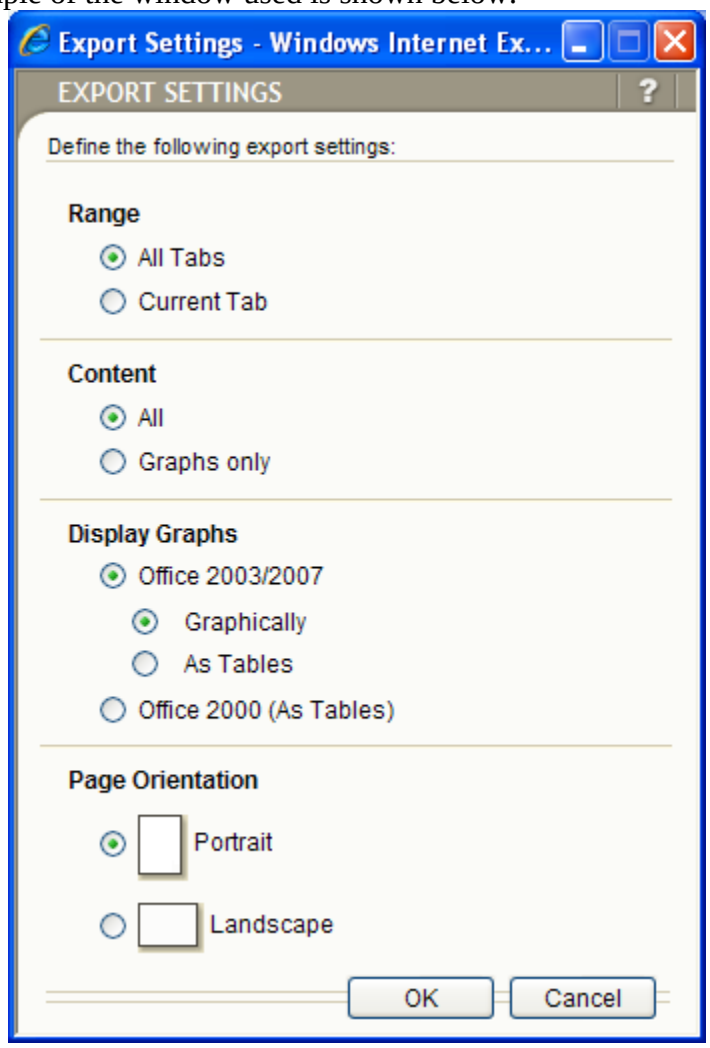


Once knowledge has been provided the form will notify the user of its existence using the "light bulb' ( ) on the upper right portion of the browser. The location is shown in the example below.

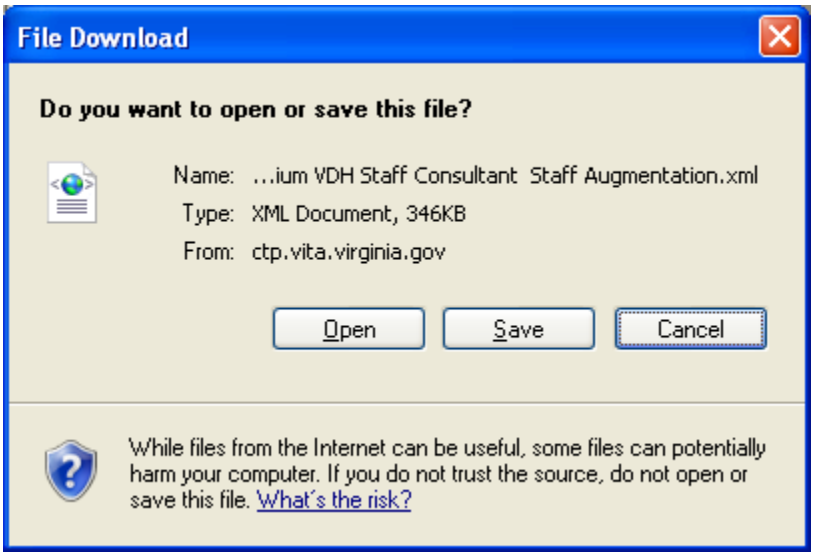
Export

This option allows the user to export and save the current form and its contents.

Step 1: An example of the window used is shown below.



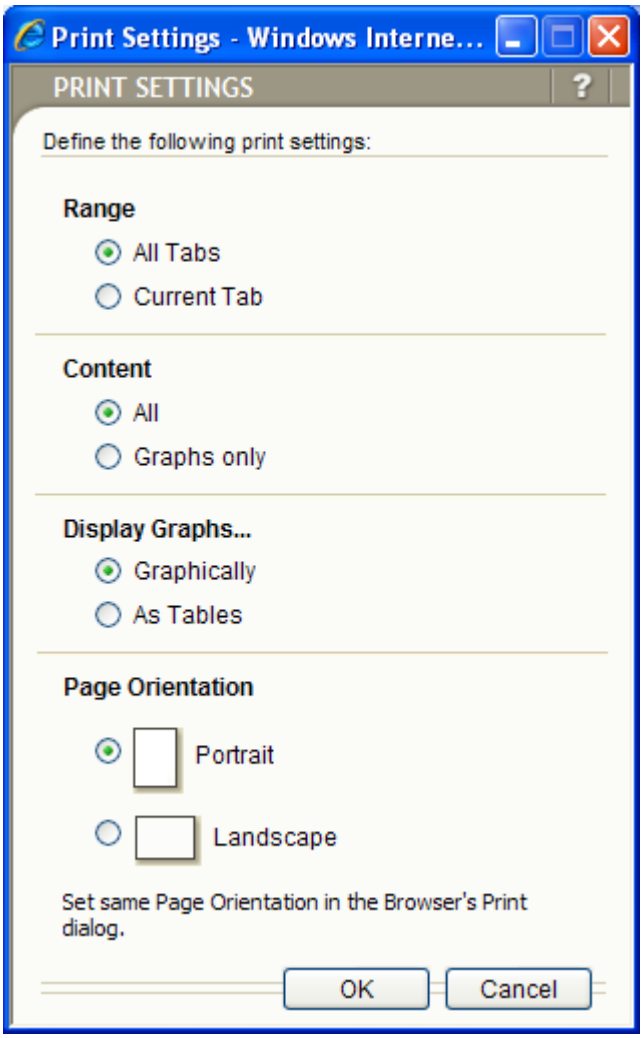
Step 2: Selection of Opening or Saving the exported document.



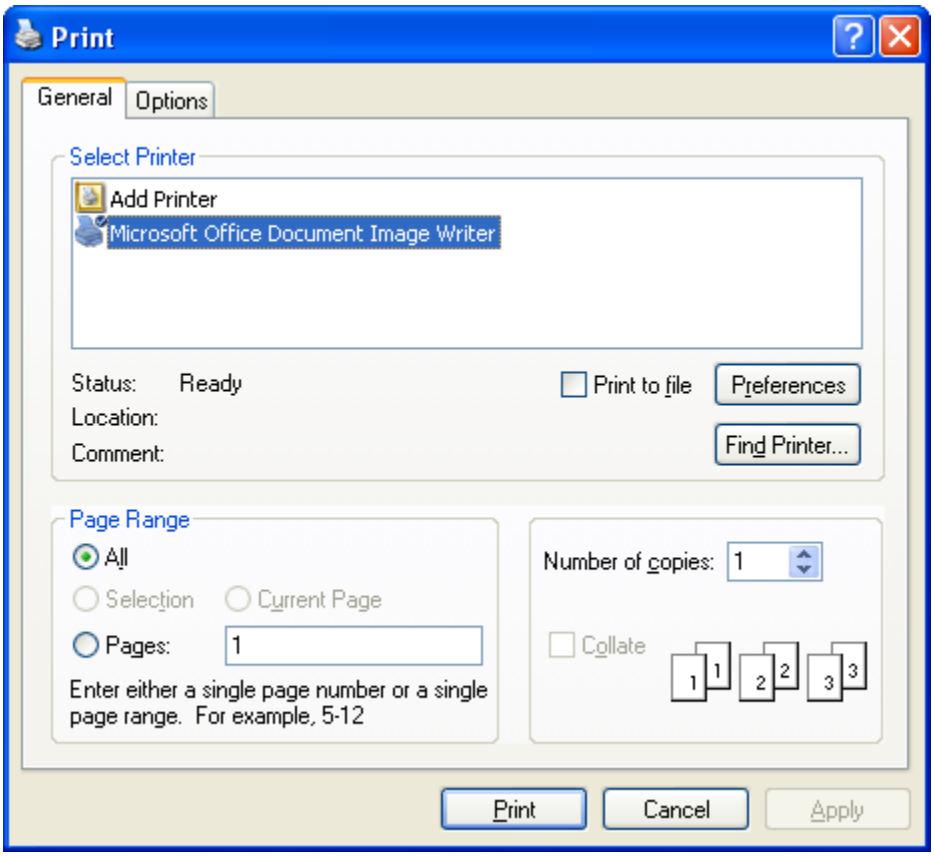
Print

This option allows the user to print the current form and its contents.

Step 1: An example of the window used is shown below.



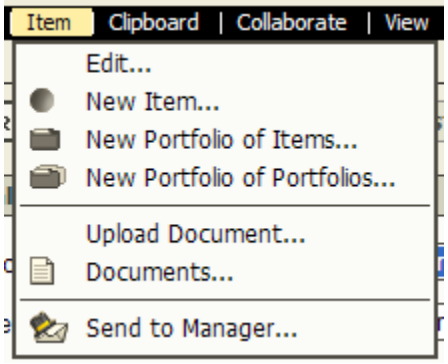
Step 2: Selection of printer to be used



Logout

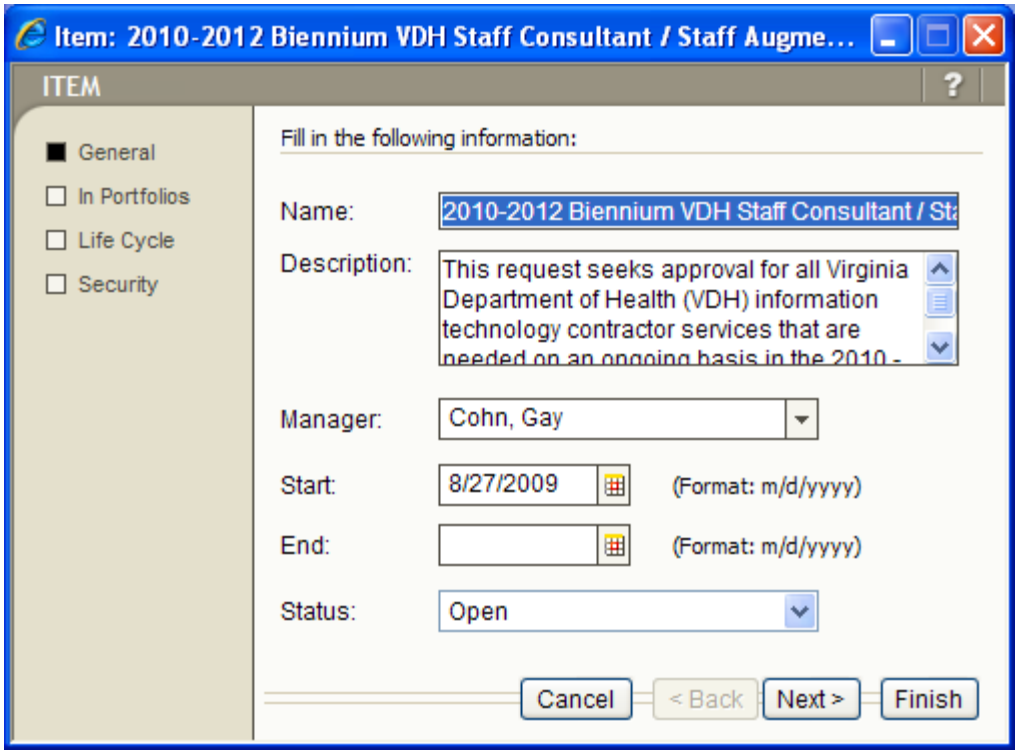
This option allows the user to log out as the current user, and log in as a different user if desired. This option is not used in CTP. Login and passwords are controlled through a network access to the COV network domain. Never log out, use the “x” in the upper right hand corner to close the application.

Item



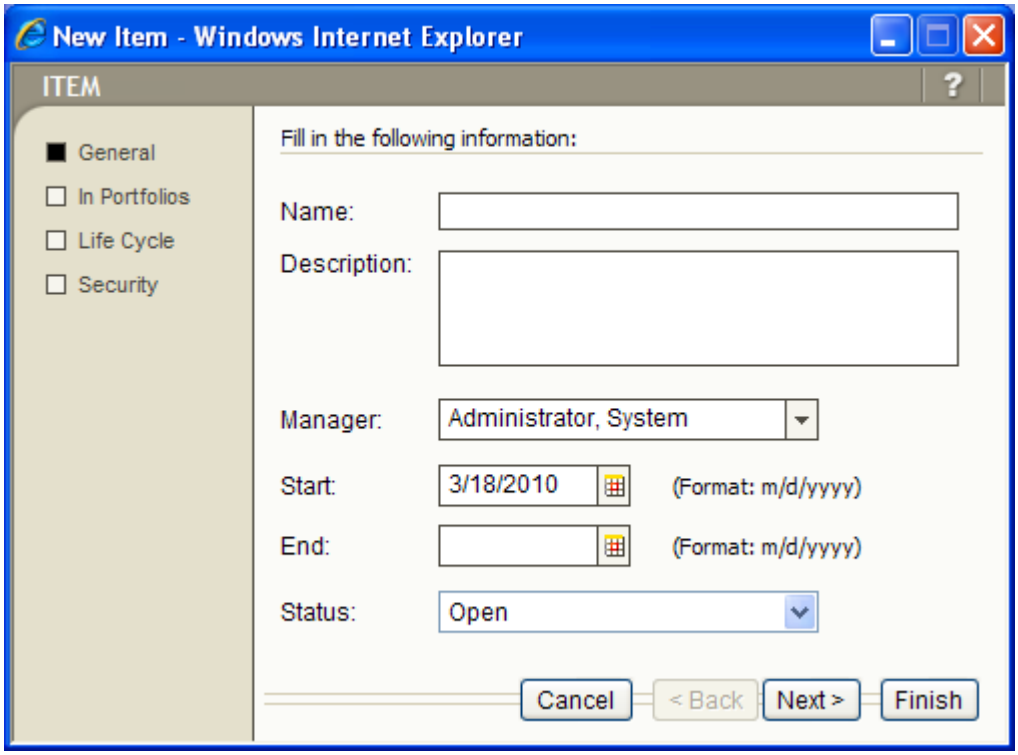
Edit

This option will allow the user to view the system level information associated with an item using the wizard provided by Primavera Portfolios. An example of the first window in the wizard is shown below.



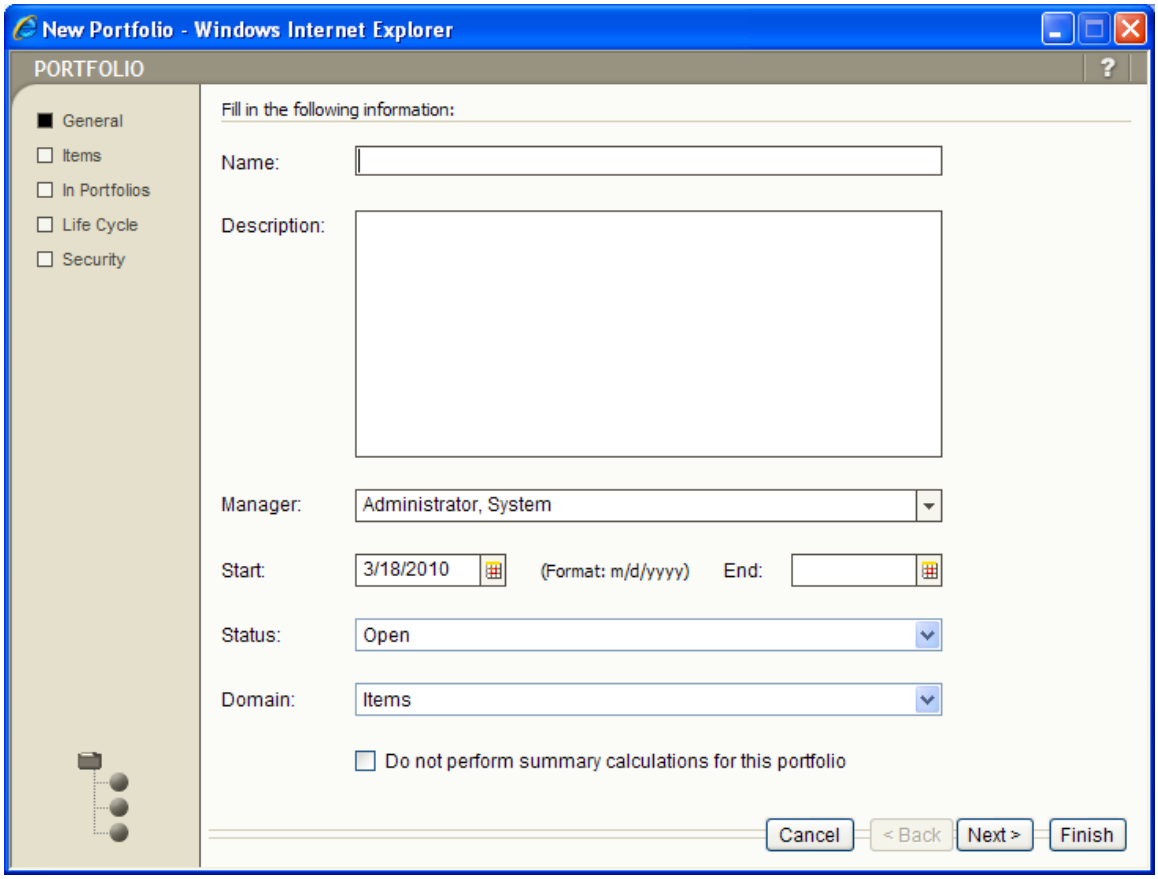
New Item

This option will allow the user to create a new Item using the wizard provided by Primavera Portfolios. An example of the first window in the wizard is shown below.



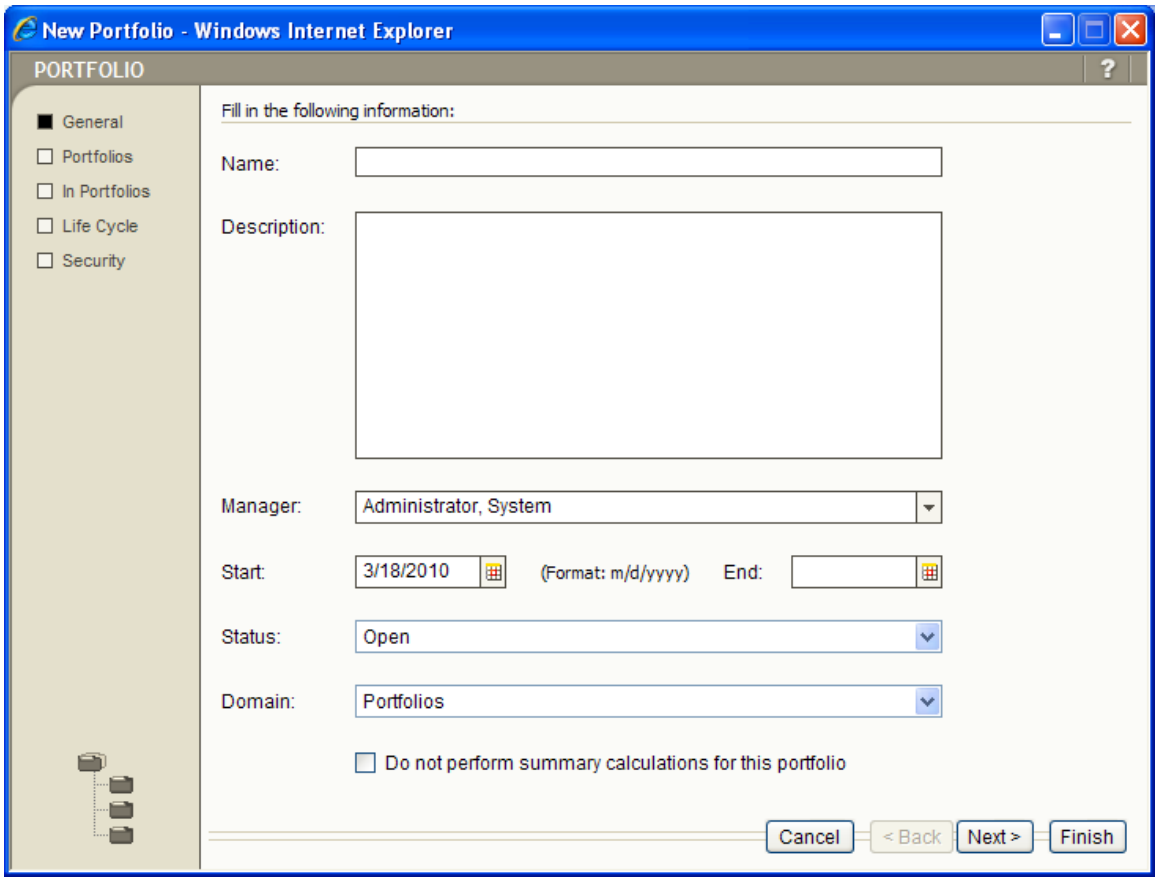
New Portfolio of Items (Disabled)

This option will allow the administrator to create a new Portfolio (folder) of Items using the wizard provided by Primavera Portfolios. By doing this they can build a tree structure allowing them to organize individual Items. An example of the first window in the wizard is shown below.



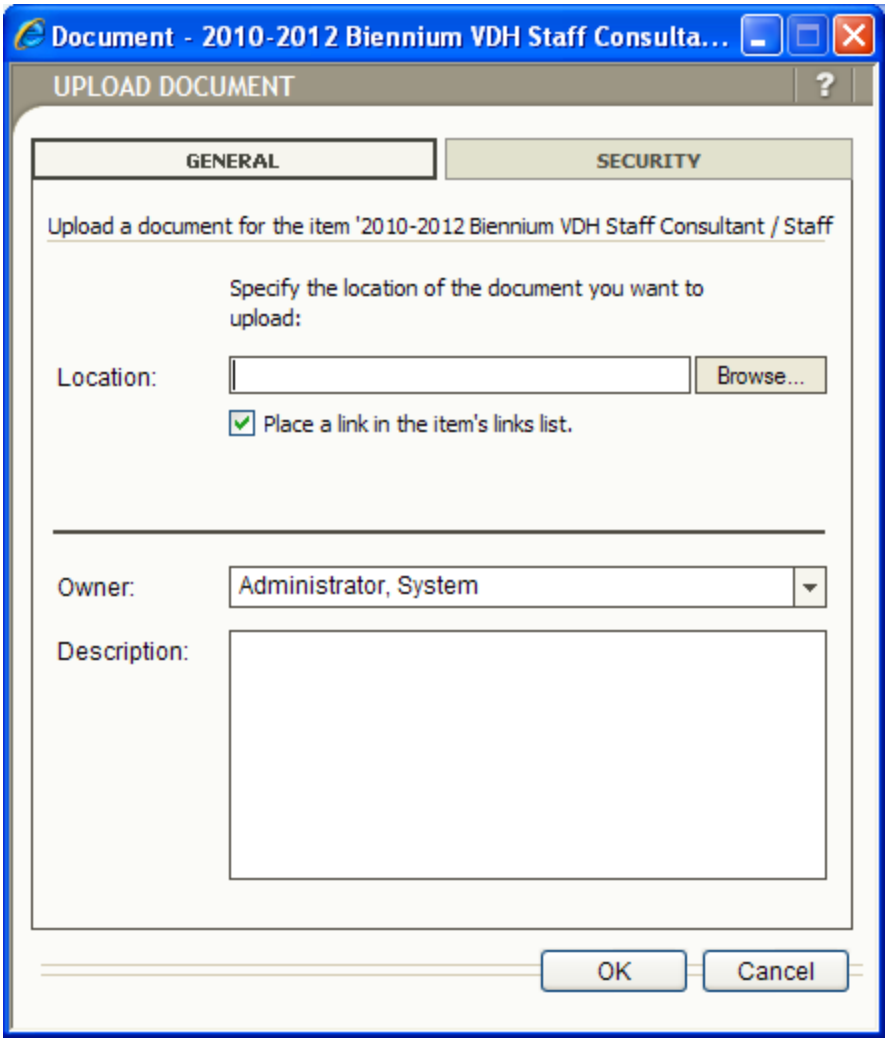
New Portfolio of Portfolios (Disabled)

This option will allow the administrator to create a new Portfolio (folder) of Portfolios (folders) using the wizard provided by Primavera Portfolios. By doing this they can build a tree structure allowing them to organize individual Items. An example of the first window in the wizard is shown below.



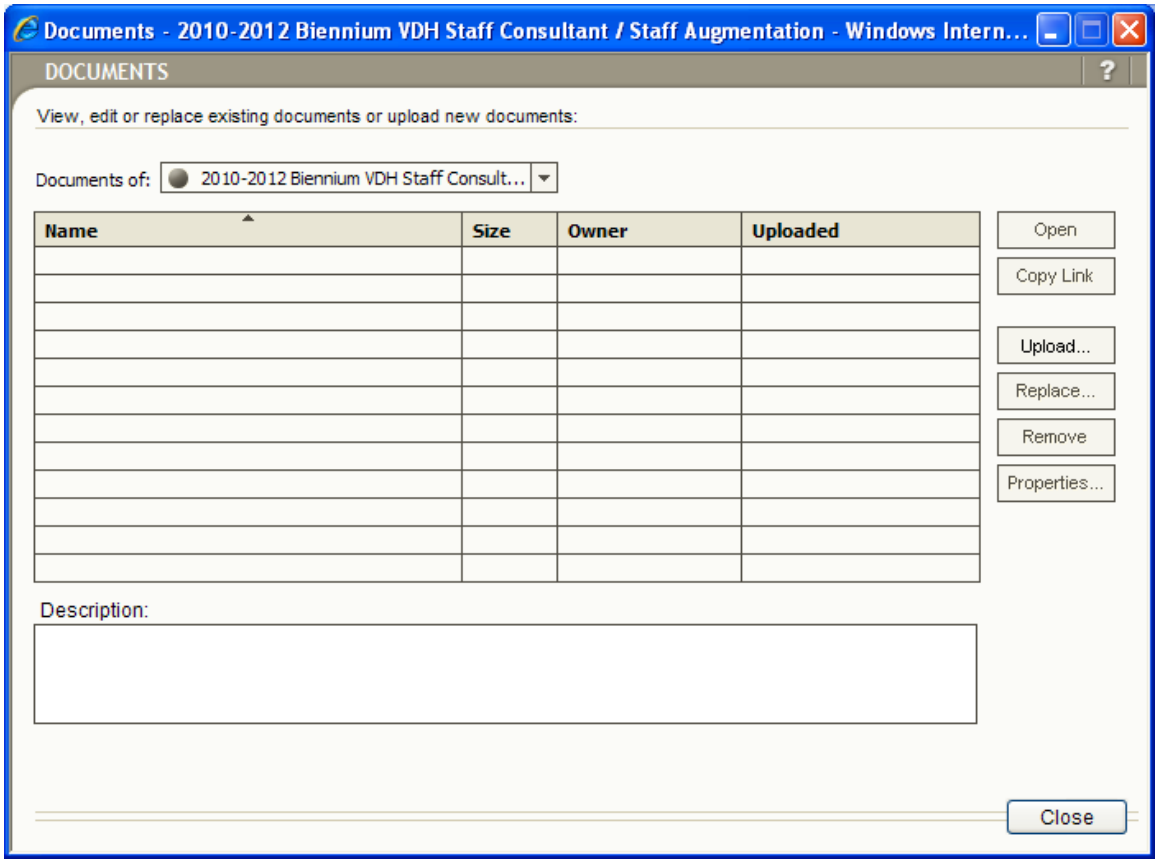
Upload Document

This option allows the user to upload a document to the server. An example of the window used is shown below.



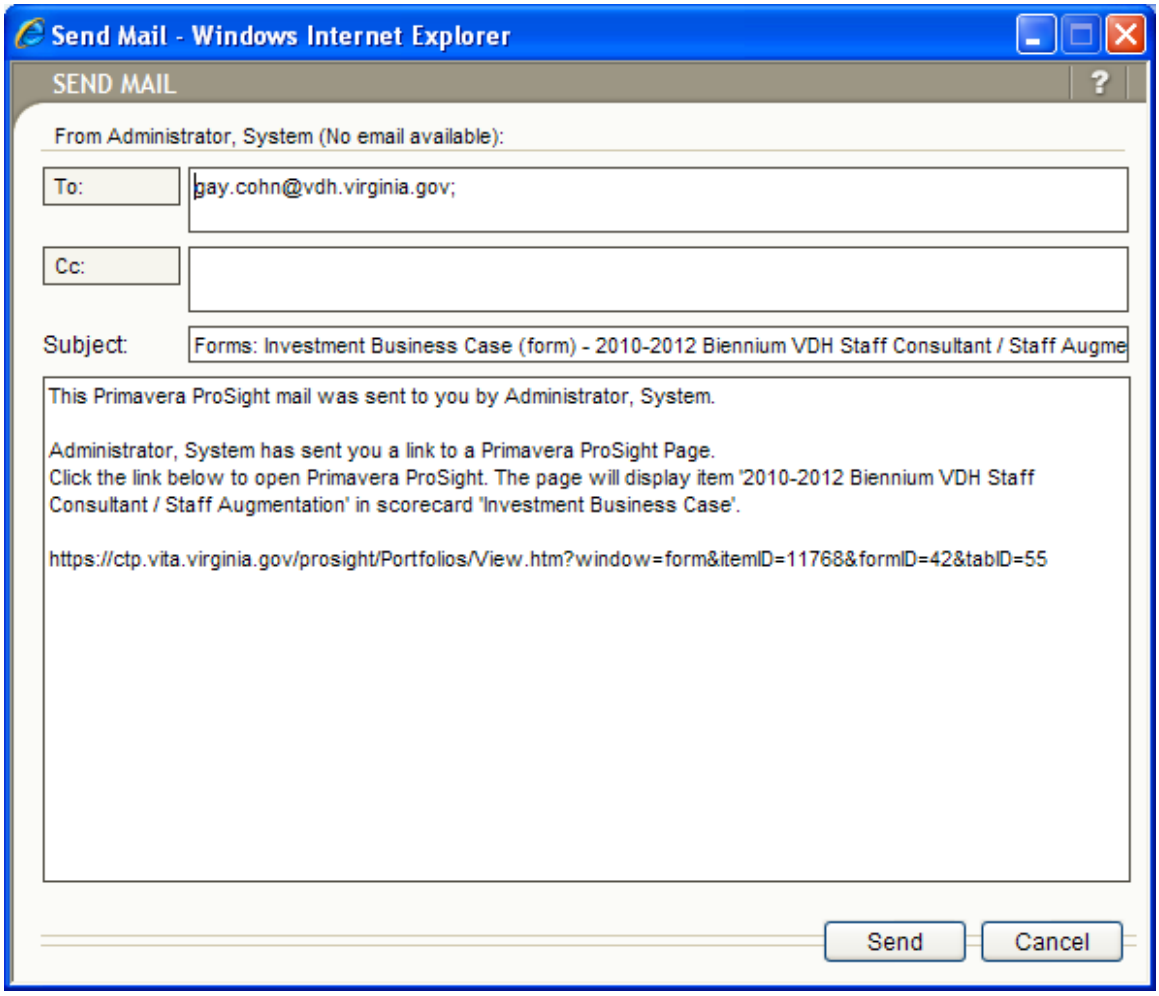
Documents

This option opens the window below and allows the user to open, upload, etc. specific documents created externally but associated with the project or procurement.

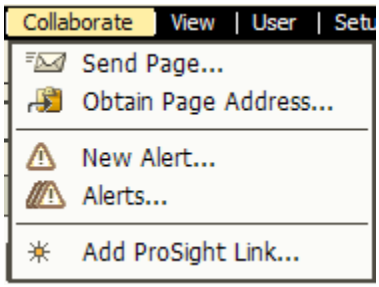


Send to Manager

This option will allow the user to send an email to the 'Manager' (Owner) of the item (i.e. Project or Procurement). An example of the window used is shown below.

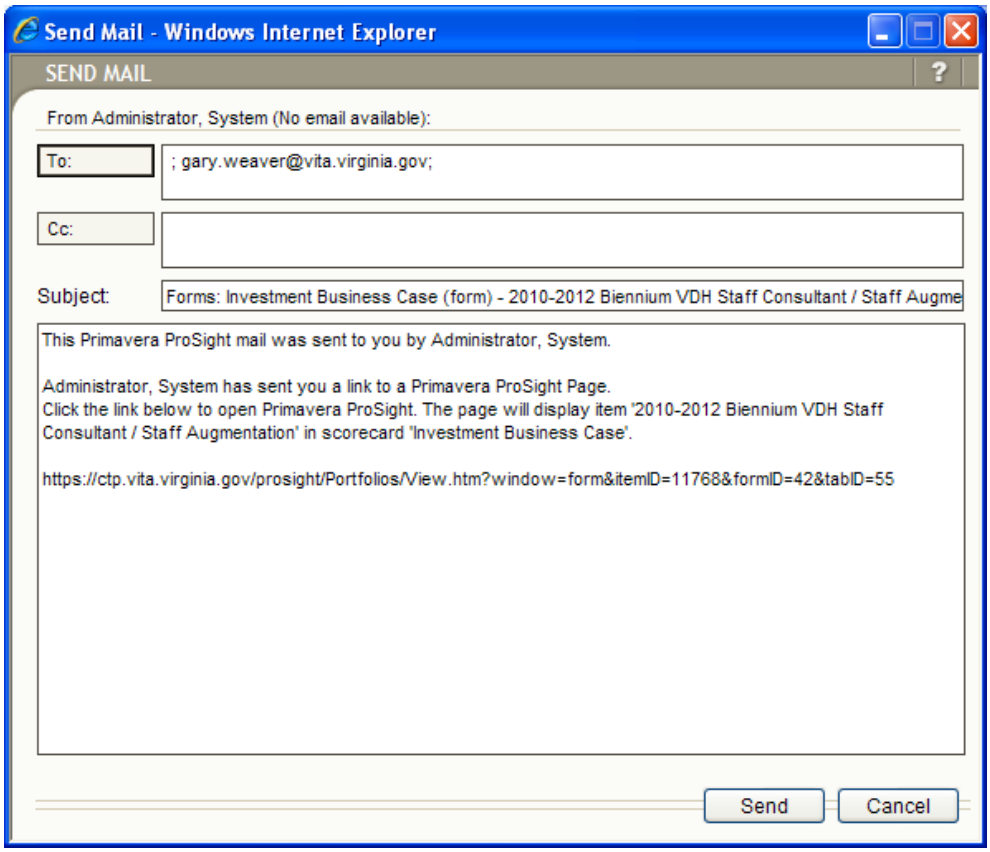


Collaborate



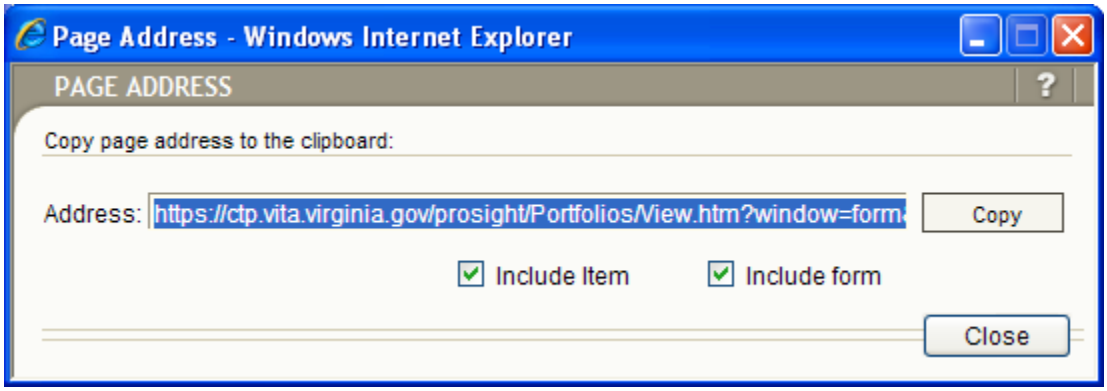
Send Page

This option will allow the user to send an email containing the URL of the present; Form, Tab, and Item, and send it to any active user or user group in the application. An example is provided below.



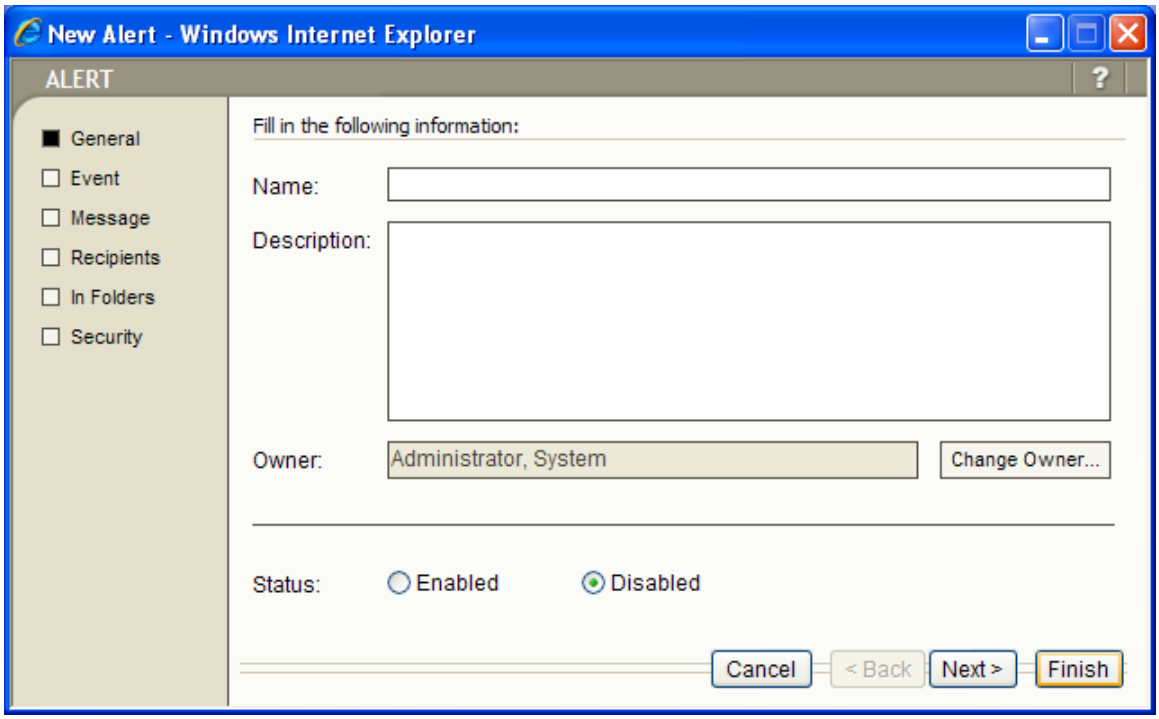
Obtain Page Address

This option allows the user to obtain the page address of the present; Form, Tab, and Item displayed on the screen. An example of the window you will see is shown below.



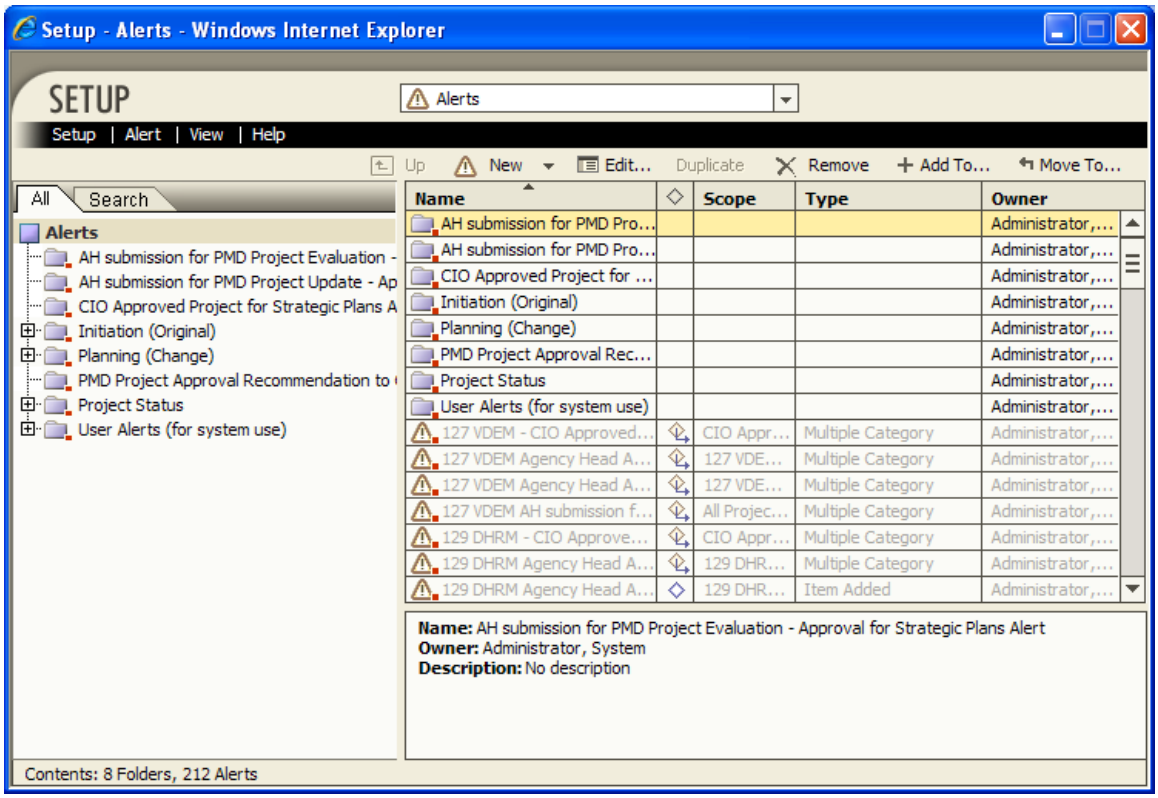
New Alert (Disabled)

This option will allow the administrator to create an alert using the wizard provided to walk them through the various requirements. The first page of the wizard is shown below.



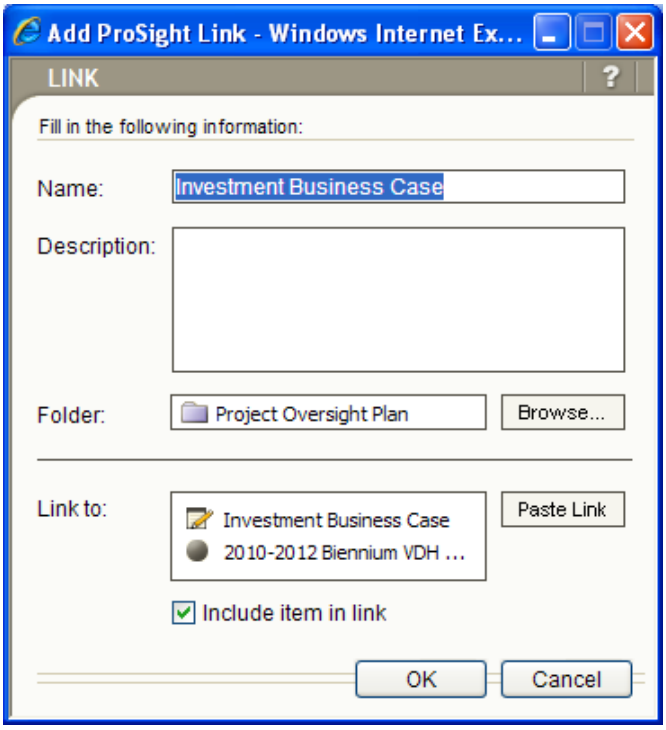
Alerts (Read only)

This option opens up the setup window focused on Alerts and facilitates the administrator/user activity of viewing or modifying them. An example of the window is shown below.

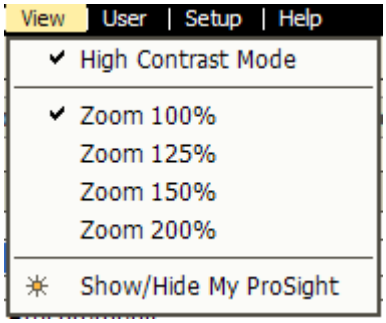


Add ProSight Link

This option will allow the user to add a new link to the currently active My ProSight process. An example of the window used is shown below.



View



High Contrast Mode

This allows the user to choose between a regular display and a high contrast display.

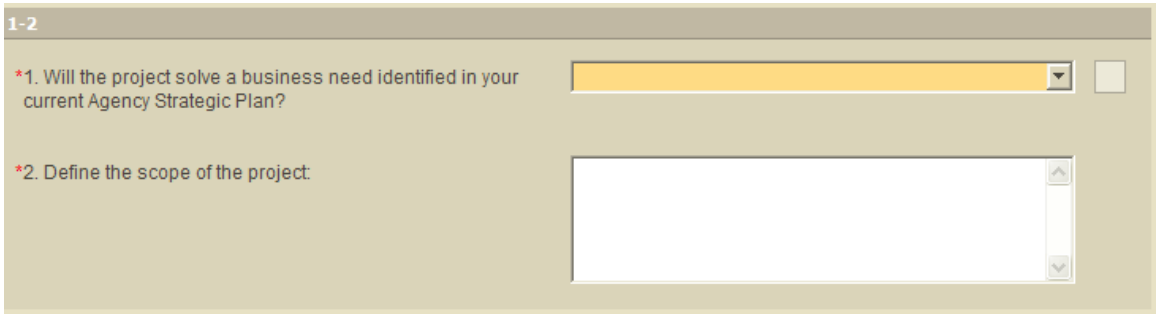


Figure 1 - Regular

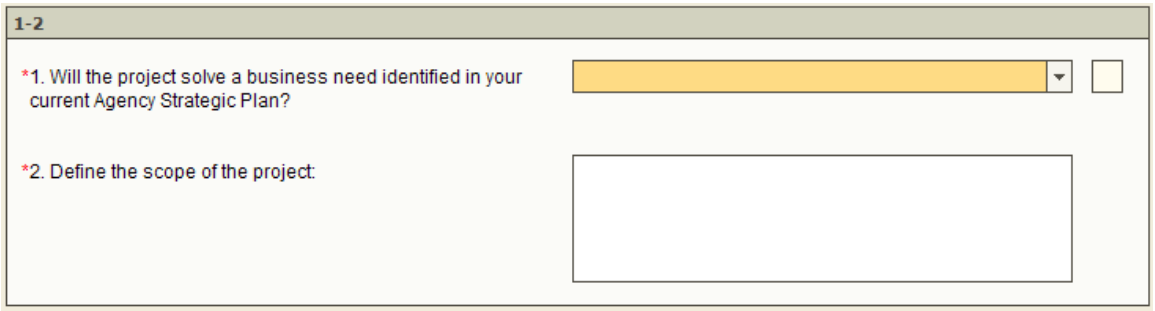


Figure 2 - High Contrast

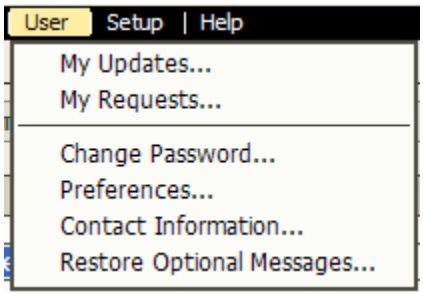
Zoom Selections

These options allow the user to choose the amount of zoom they wish to use. The higher the percentage, the larger the image displayed will be.

Show/Hide My ProSight

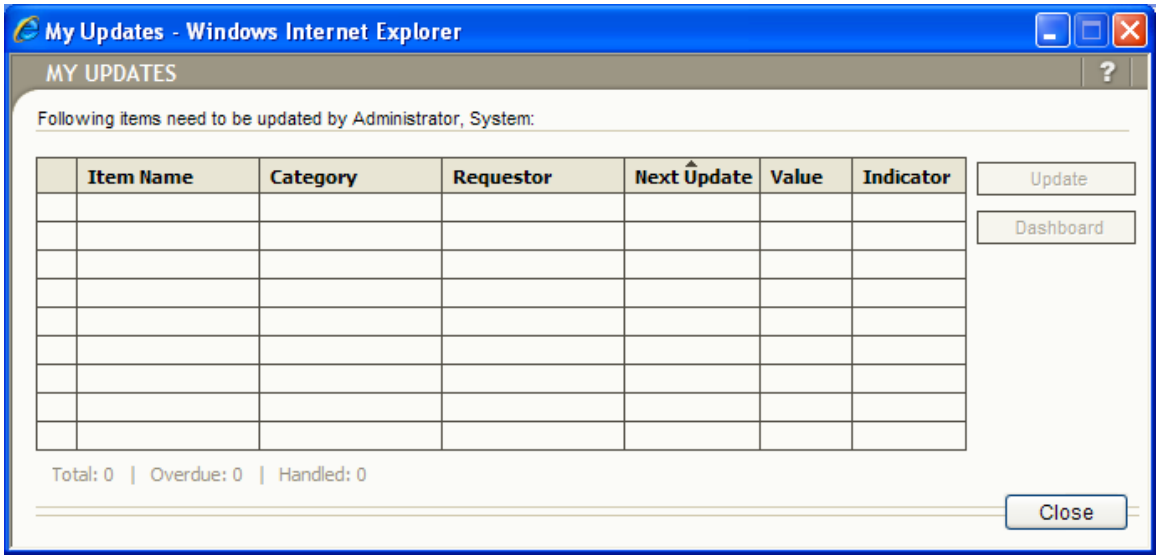
This selection will either hide or make visible the My Processes window that appears on the left side of the display and contains the process documentation associated with CTP.

User



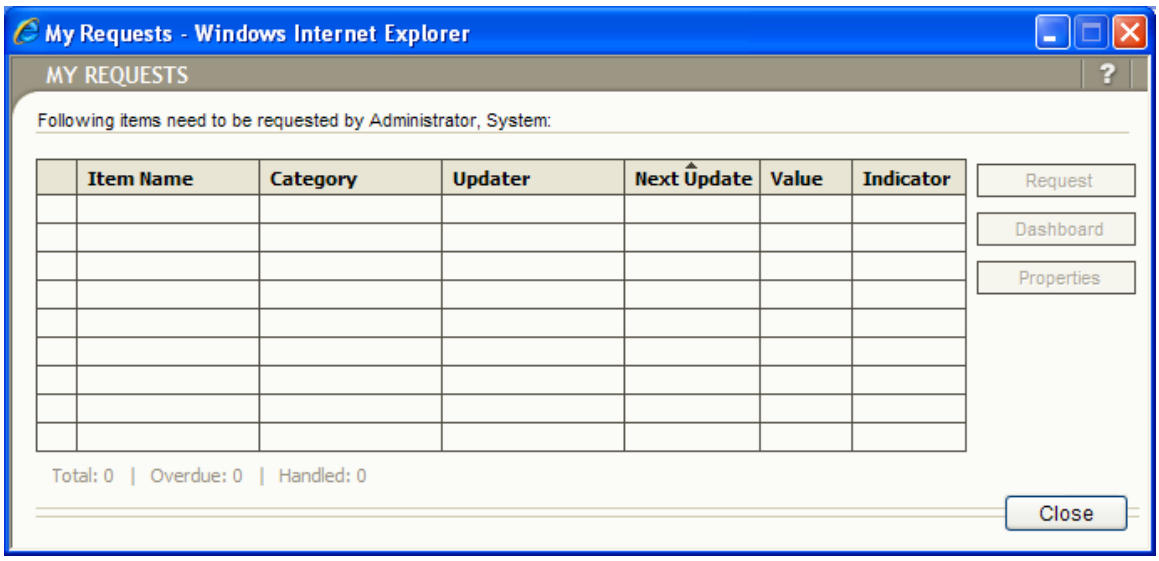
My Updates

This option opens the window below. Each line in the My Updates table represents a cell in a scorecard. Cells that appear in this table are cells for which an update that you are responsible for providing is due. The lines representing the cells are in order of the update due dates.



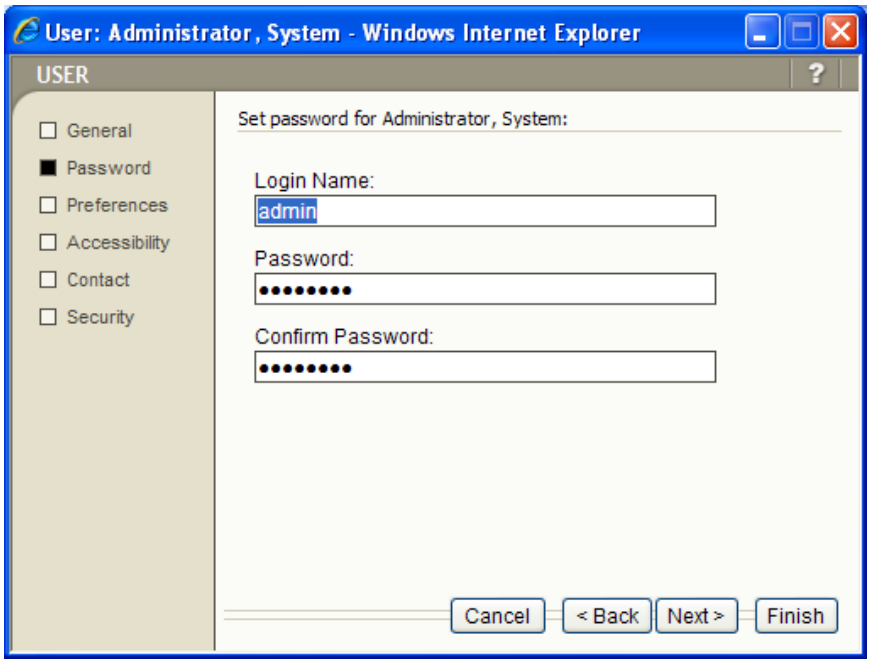
My Requests

This option opens the window below. Each request represents a cell in a scorecard. Cells that appear in this table are cells for which you have requested an update. The lines representing the cells in order of the update due dates.



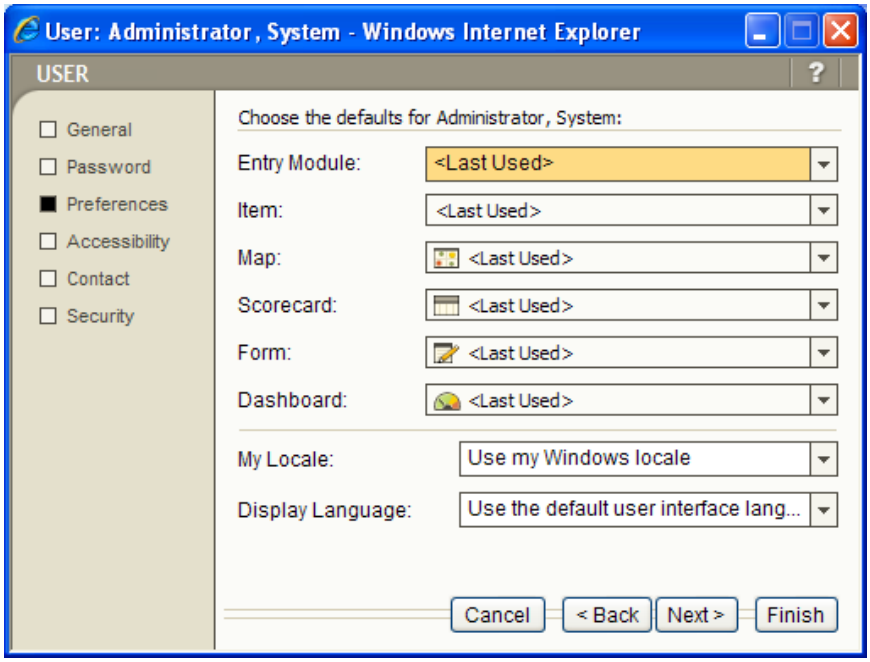
Change Password (Disabled)

This option opens the window below CTP utilizes single sign on through the COV network , and the application login and internal password is disabled.



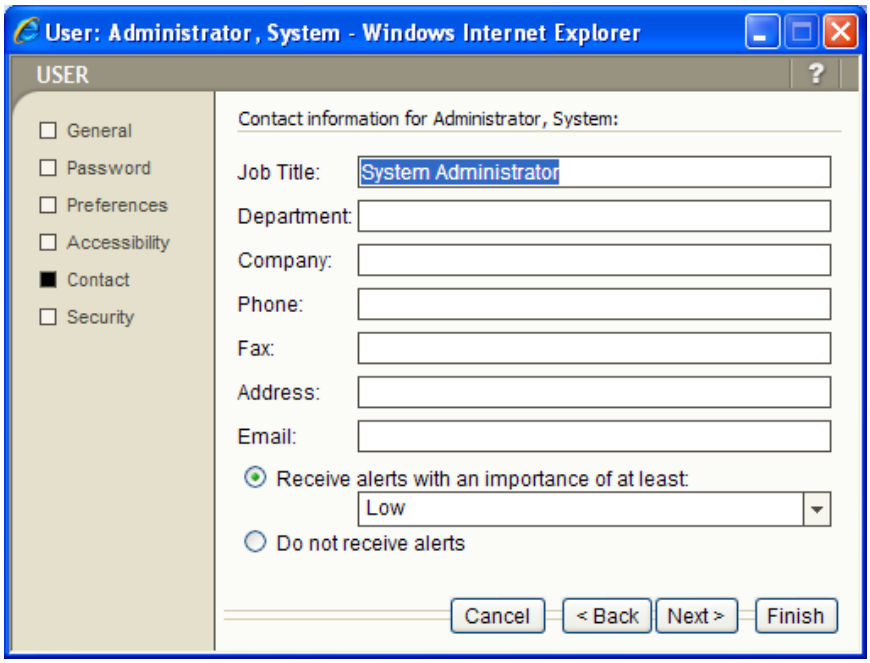
Preferences

This option opens the window below



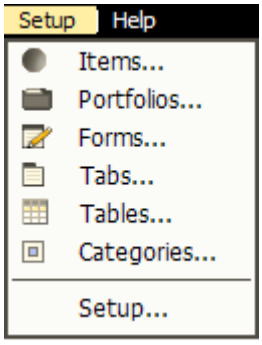
Contact Information

This option opens the window below



Restore Optional Messages

Setup (Read only)



Items

This option opens the setup window focused on items.

Portfolios

This option opens the setup window focused on Portfolios.

Forms

This option opens the setup window focused on Forms.

Tabs

This option opens the setup window focused on Tabs.

Tables

This option opens the setup window focused on Tables.

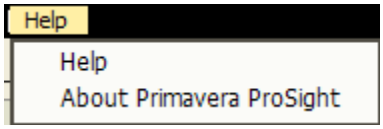
Categories

This option opens the setup window focused on Categories.

Setup

This option opens the setup window focused on what ever was your subject of interest last time you opened the window.

Help

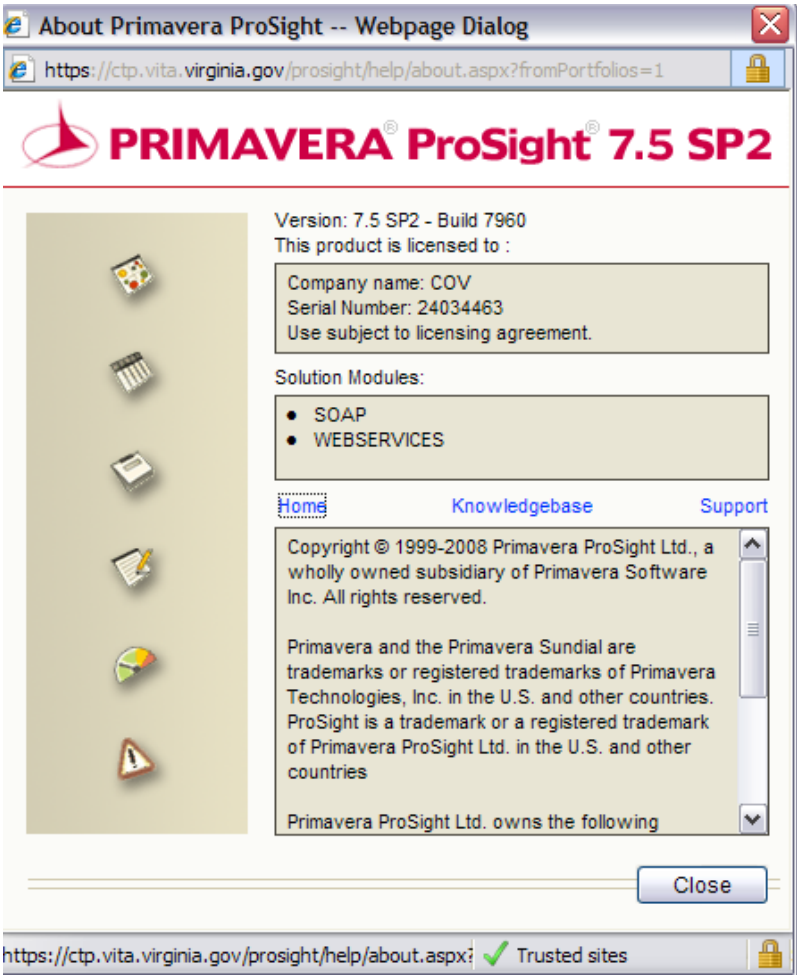


Help

Help is disabled currently in the 64 bit version (Primavera Portfolios 7.5.2) used by CTP.

About Primavera ProSight

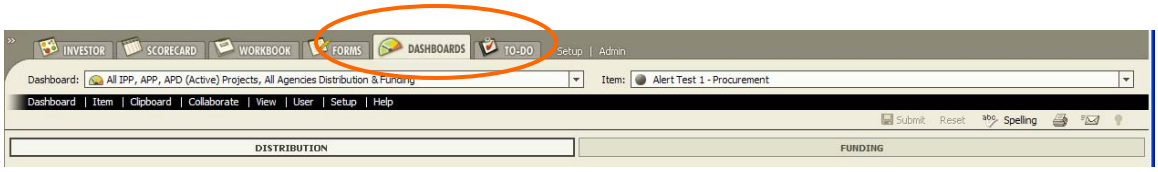
This option will open the window below



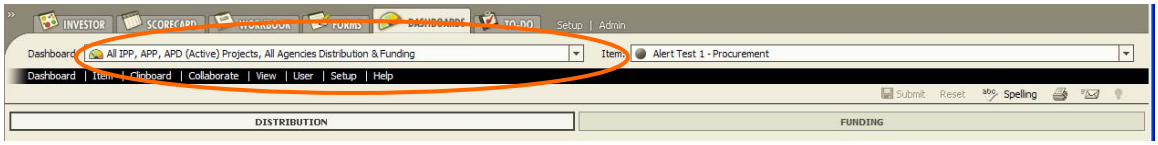
Dashboard Selection

1) Select the “

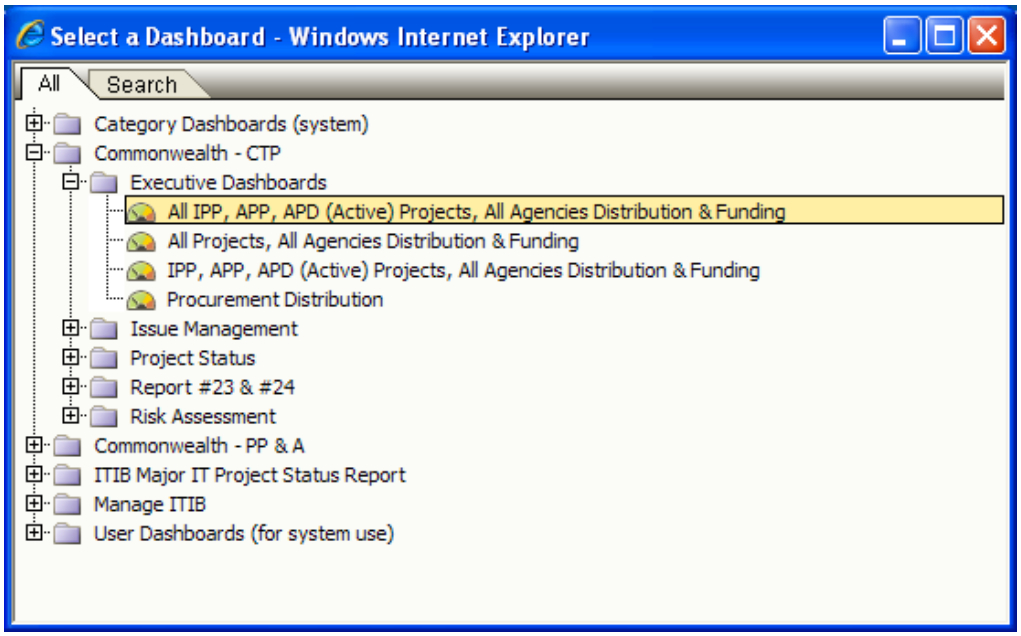
” tab



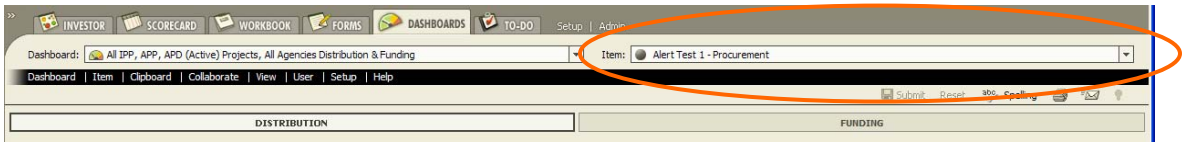
2) Now we are going to select a Dashboard to view. Select the “ ”as shown below



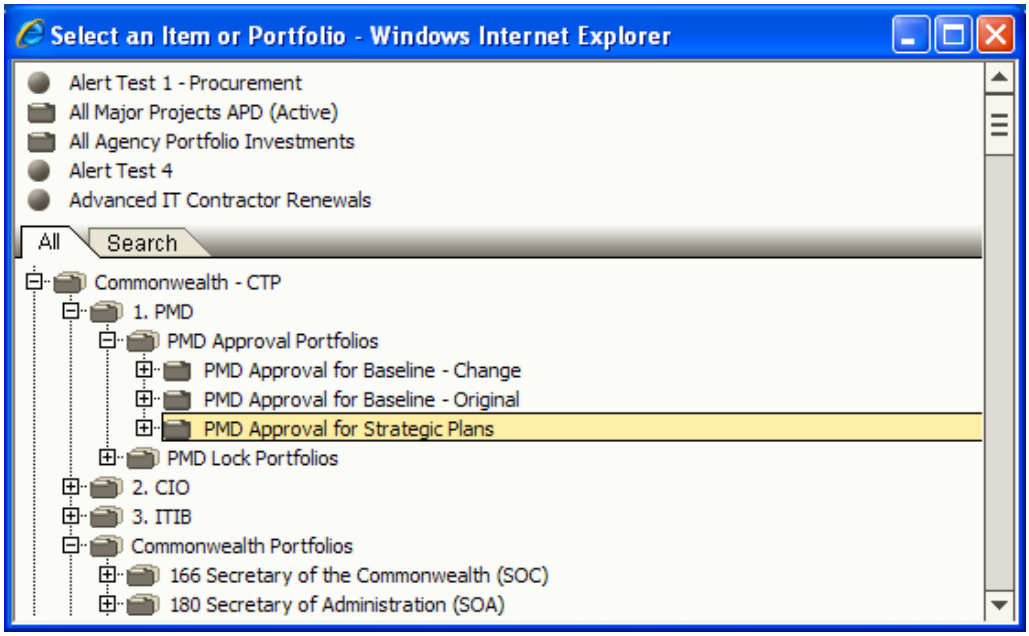
3) Please select a Dashboard, we’ve selected “All IPP, APP, APD, (Active)…” in our example.



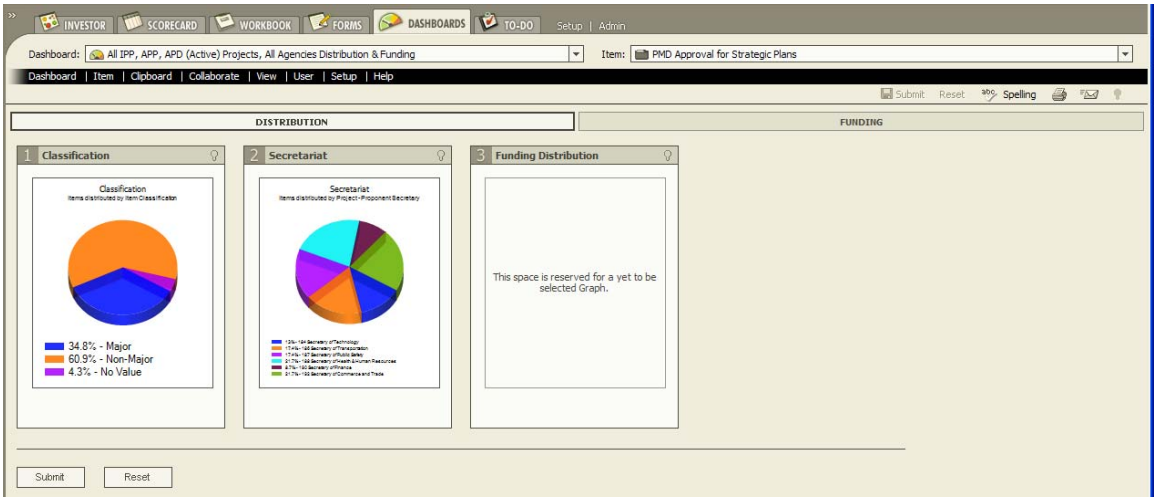
4) Now we are going to select a Portfolio to view. Select the "▼"as shown below



5) Select a Portfolio; we've selected "PMD Approval for Strategic Plans" in our example.



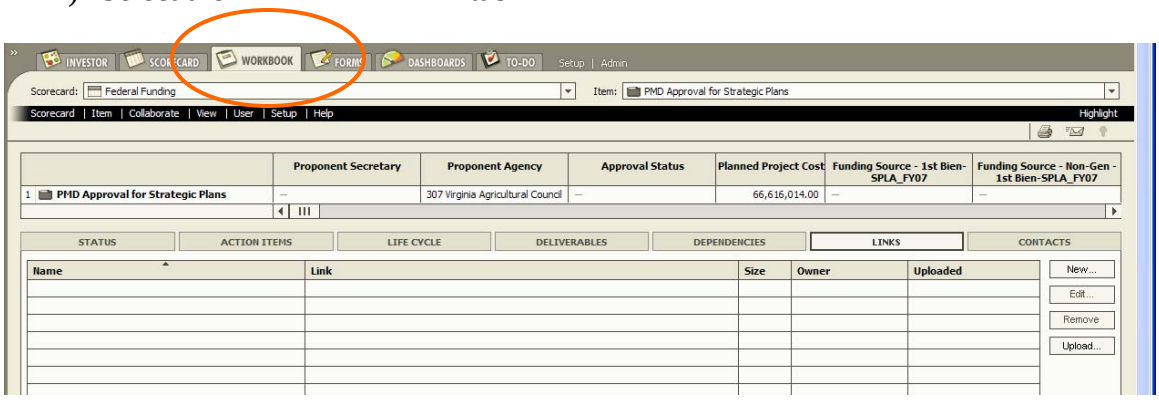
6) The end result



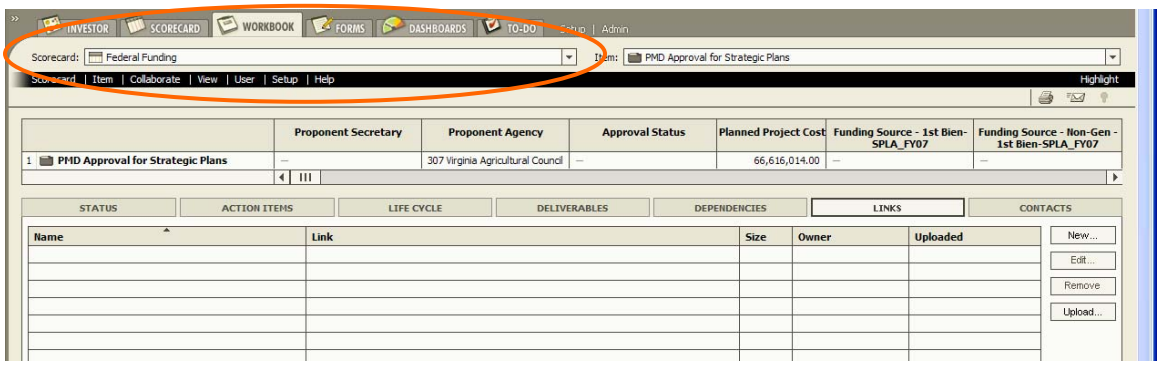
Workbook

1) Select the "

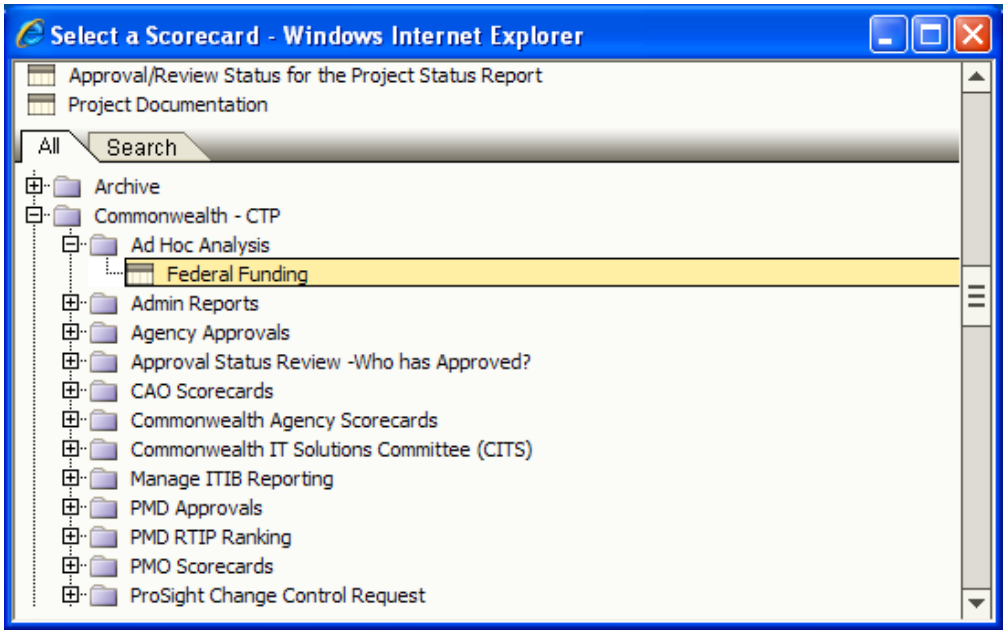
" tab



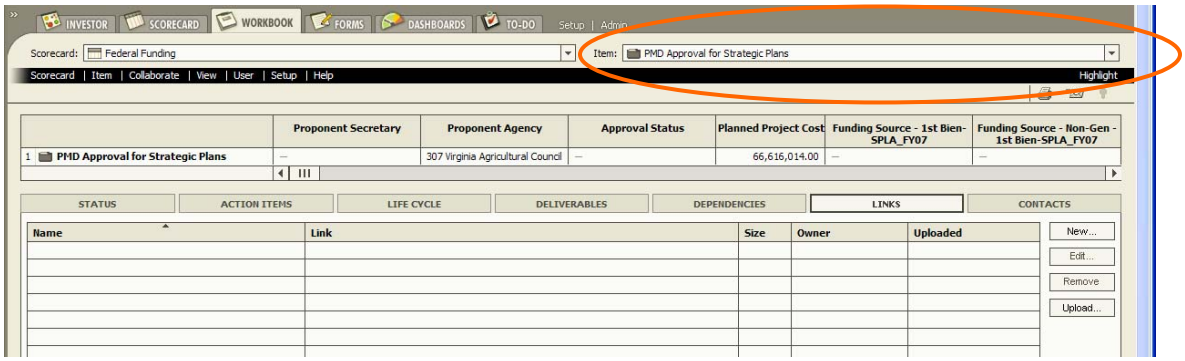
2) Now we are going to select a Scorecard to view. Select the " "as shown below



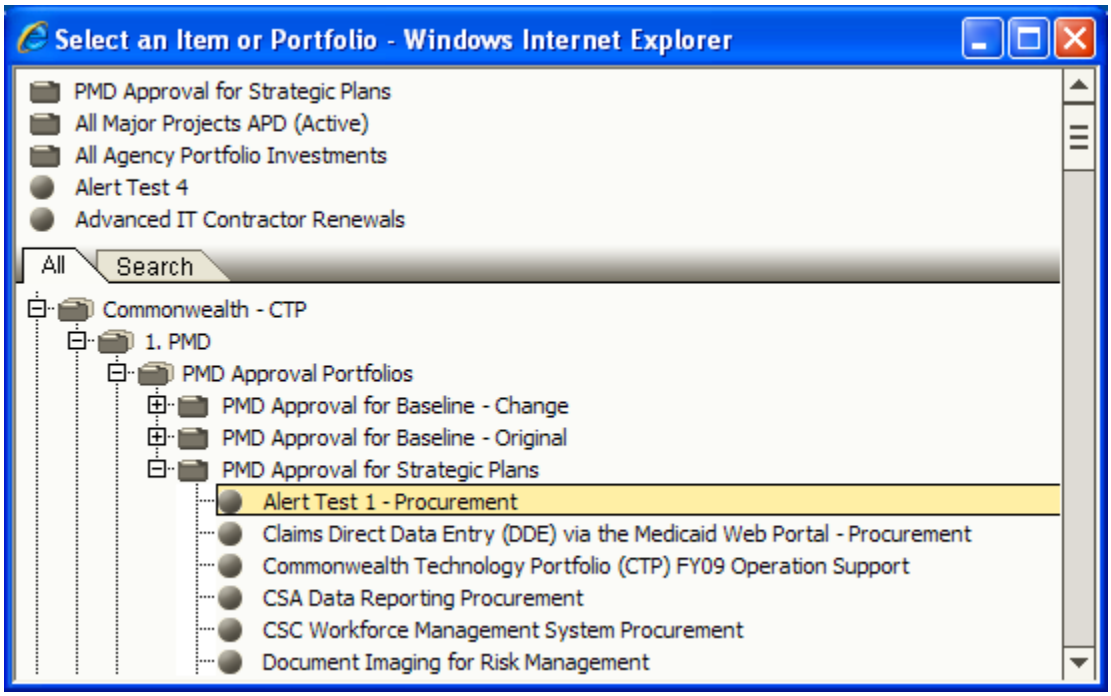
3) Select a Scorecard, in this example we have chosen the “Federal Funding” Scorecard.



4) Now we are going to select an Item to view. Select the “ ”as shown below



5) Select an Item, we've chosen the "Alert Test 1 - Procurement" item.



For more navigational information concerning Workbooks please reference the Advanced Capabilities training document.

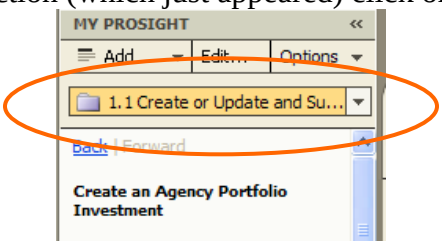
Printing Appendix A

Sub-Process 1.6. Review and Print Appendix - A:

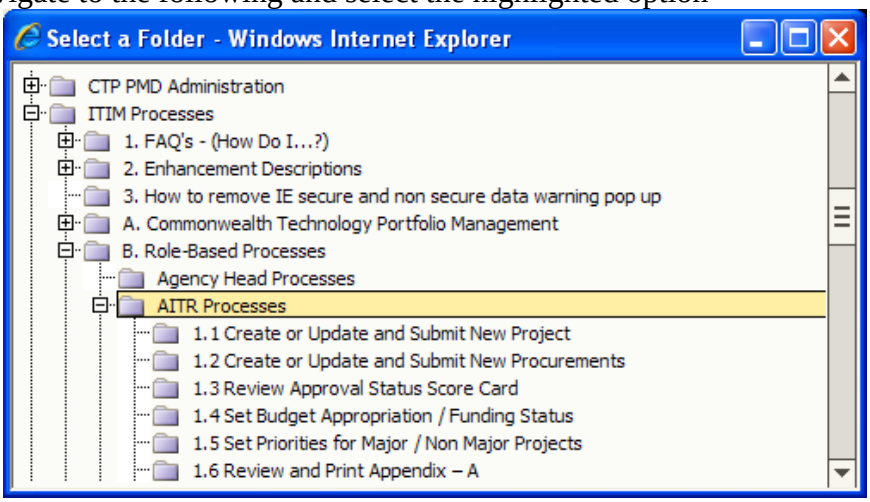
Complete the following steps to review and print Appendix – A

Select the AITR Processes:

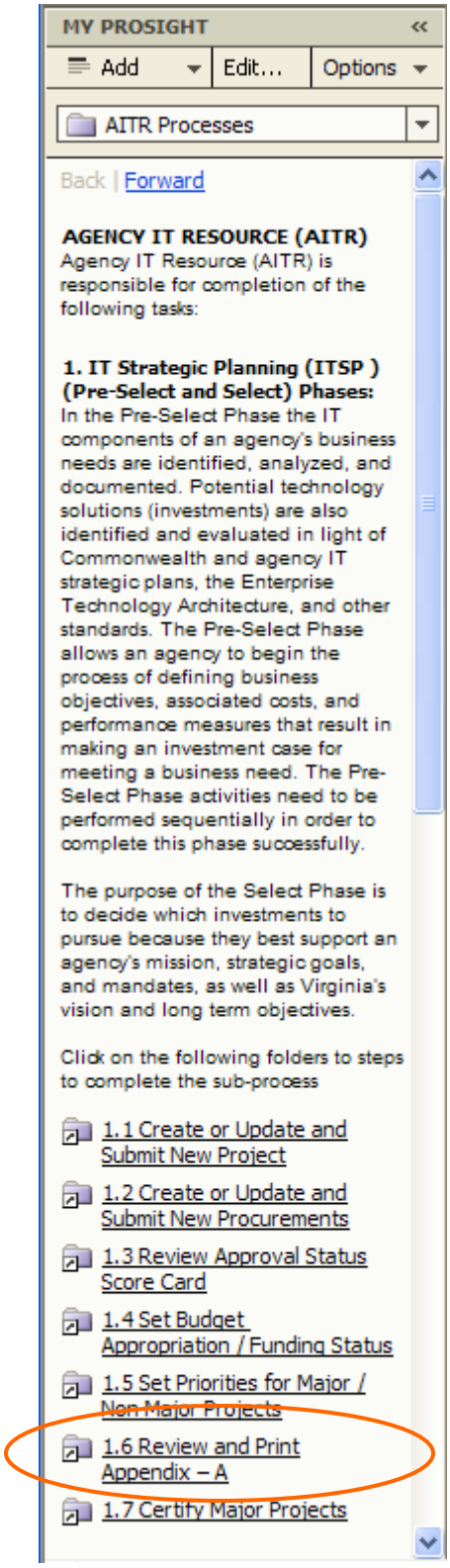
- In My Portfolios Section (which just appeared) click on the drop- box option



- From the drop-box select the following:
- Navigate to the following and select the highlighted option

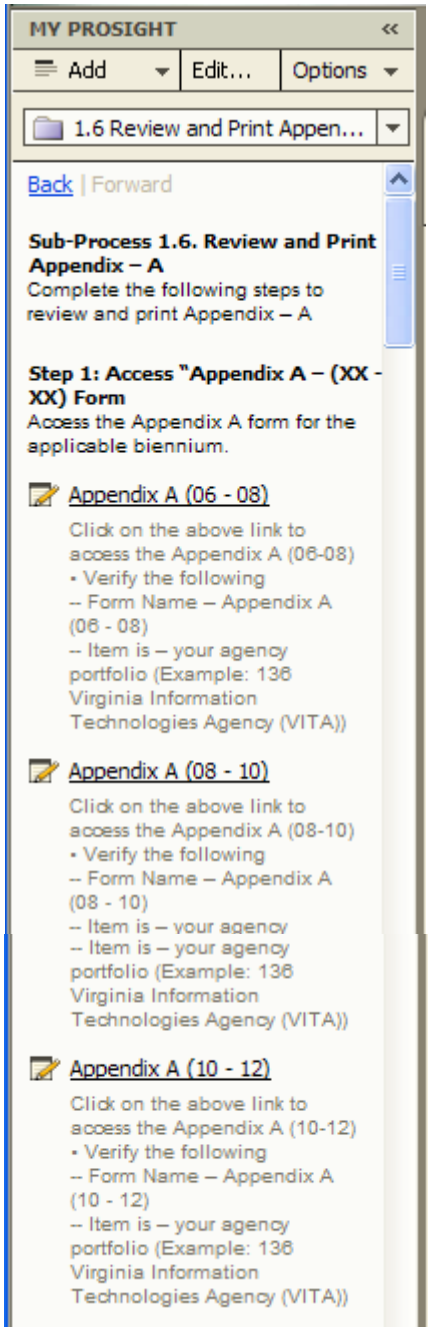


- You are now looking at the parent location for all the AITR related processes. Scroll down and select the option as shown in the figure below.


MY PROSIGHT
Add
Edit...
Options
AITR Processes
Back | Forward
AGENCY IT RESOURCE (AITR)
Agency IT Resource (AITR) is responsible for completion of the following tasks:
1. IT Strategic Planning (ITSP) (Pre-Select and Select) Phases:
In the Pre-Select Phase the IT components of an agency's business needs are identified, analyzed, and documented. Potential technology solutions (investments) are also identified and evaluated in light of Commonwealth and agency IT strategic plans, the Enterprise Technology Architecture, and other standards. The Pre-Select Phase allows an agency to begin the process of defining business objectives, associated costs, and performance measures that result in making an investment case for meeting a business need. The Pre-Select Phase activities need to be performed sequentially in order to complete this phase successfully.
The purpose of the Select Phase is to decide which investments to pursue because they best support an agency's mission, strategic goals, and mandates, as well as Virginia's vision and long term objectives.
Click on the following folders to steps to complete the sub-process
1.1 Create or Update and Submit New Project
1.2 Create or Update and Submit New Procurements
1.3 Review Approval Status Score Card
1.4 Set Budget Appropriation / Funding Status
1.5 Set Priorities for Major / Non-Major Projects
1.6 Review and Print Appendix – A
1.7 Certify Major Projects

Step 1: Access "Appendix A – (XX -XX) Form:

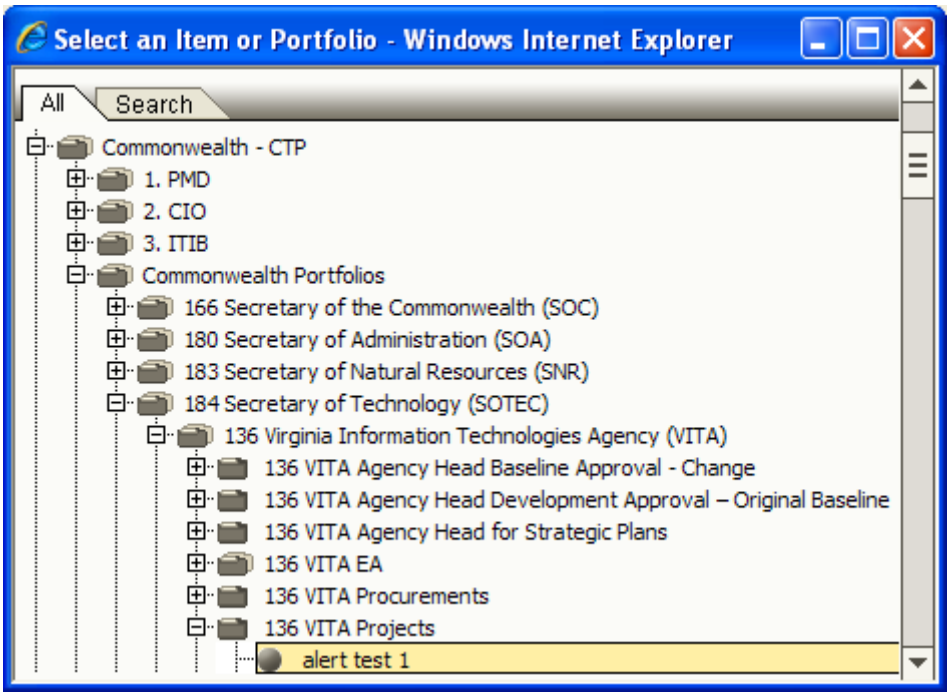
Access the Appendix A form for the applicable biennium. There are three links as shown below. Each of these links will present information with regards to a specific fiscal biennium. Select the link that best fits you needs



Step 2: Click on the Final Projects – Tab of the "Appendix A (xx-xx)" Form:

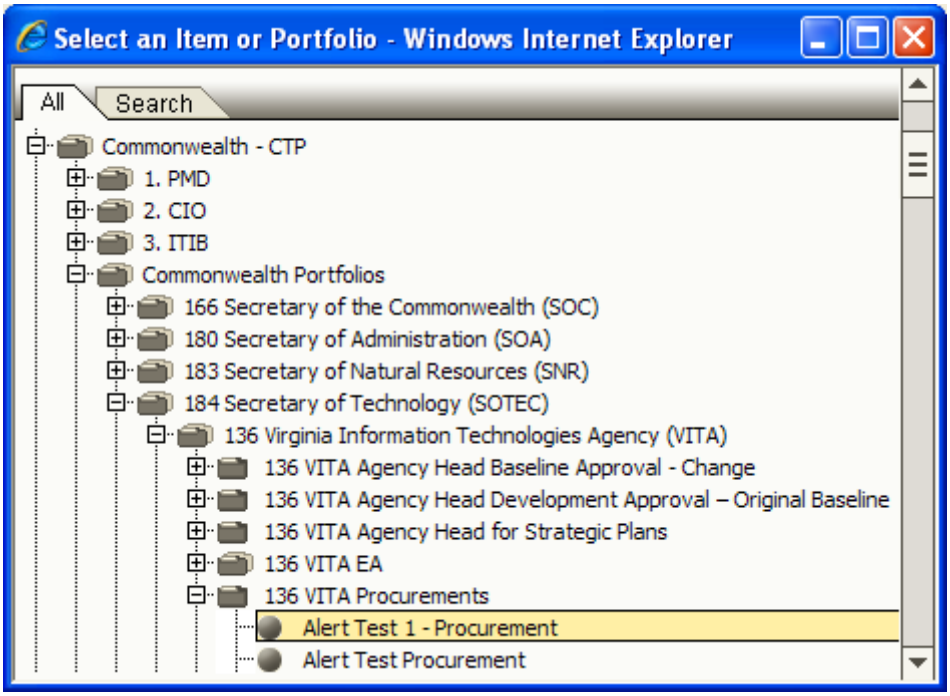
Part A:

• Appendix A – Projects Report will be displayed on this tab
• Confirm the following
-- Form Name is – Appendix A (XX - XX)
-- Item is – any item (project or a procurement from your agency project or procurement portfolio
Example:



Part B:

• Appendix A – Procurements Report will be displayed on this tab
• Confirm the following
-- Form Name is – Appendix A (XX - XX)
-- Item is – any item (project or a procurement from your agency project or procurement portfolio
Example:



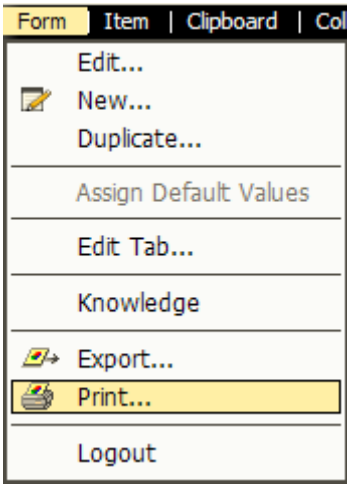
Step3: Review the Appendix A – as displayed in the "Final Projects" and "Final Procurements" tabs:

"Appendix - A" will be displayed in the "Final Projects" and "Final Procurements" Tabs of the form

"Appendix – A" must be reviewed to ensure that it reflects / or gives a correct picture of the Agency IT Strategic Plan

Step 4: Print Appendix A – Report:

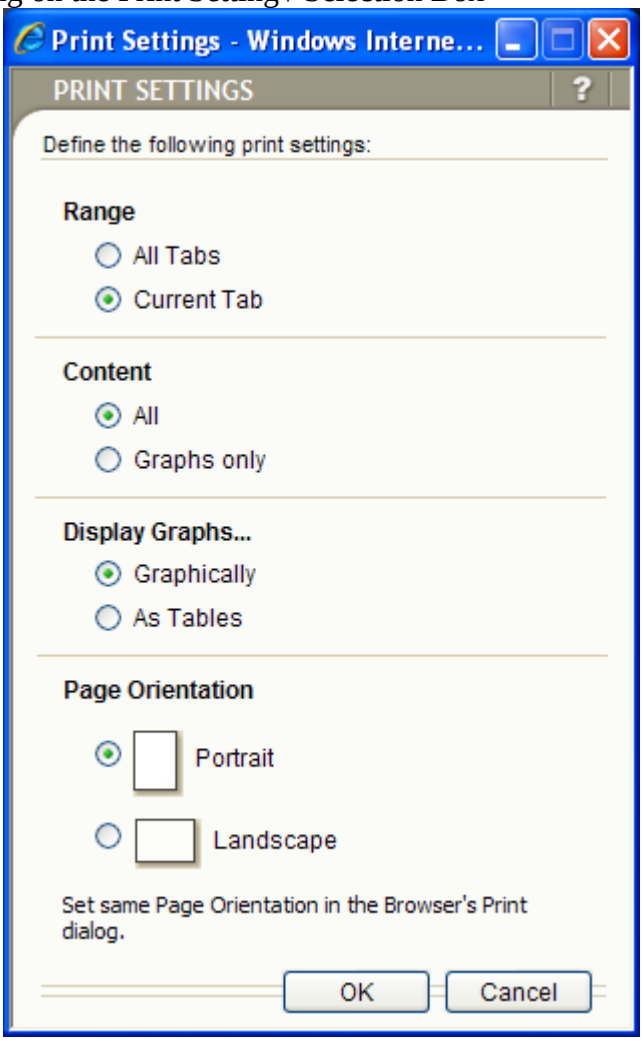
• Print both the projects and procurements



• Click on “Form” on the ProSight Menu Bar
• Click on “Print” on the “Form” drop-box

-- Print Setting/Selection Box will be displayed

• Select the following on the Print Setting / Selection Box



-- Select “Current Tab" – as we need to print only the Current Tab
-- Select “Portrait”

• Click [OK] to go to the printer setting screen (this could take a minute)

- The document will appear in a browser window
- The printer setting /selection box will be displayed on top of the document

• Click on the [Cancel] button to cancel the actual print operation

• The document will contain a link to the Appendix A report; select this link to view the report which is available in a HTML/Printable format

• Confirm the following

-- Item is – your agency portfolio (Example: 136 Virginia Information Technologies Agency (VITA))

• TO PRINT THE APPENDIX A REPORT
-- Click on “File” from browser menu
-- Select “Print”
-- Select Printer
-- Select “OK” to Print the Report

Trouble Printing:

The most common errors for not accessing or printing the report:

1. Ensure you have chosen at "item" --a project or procurement from your agency.

2. Popup blocker is activated--right click on Popup Blocker and choose "Allow Popups from this site".

3. In Internet Explorer – Internet Options – Security Tab – Internet – Custom Level – Scroll to Downloads. Automatic prompting for file downloads is disabled. Enable Automatic prompting for downloads.