

Commonwealth Technology Portfolio –ProSight Training Update Forms/Categories

Project Business Alignment/ Project Business Alignment Biennium Funding forms:

The Project Business Alignment form, and all the Project Business Alignment Biennium Funding forms have a minor change to the “General Information” tab (1st tab).

The category *Agency Proposed Project Status*: has been removed. The official status for an investment is the *Investment Approval Status* category which is now available in replacement (read-only) on the tab. Only PMD can change this category value. Agencies requesting change in their investment approval status should coordinate with PMD.

Procurement Business Alignment form:

The Procurement Business Alignment form has an important change to the “Procurement Alignment” (1st tab). A category *CIO Approval of APR* has been added with a Yes or No flag. The category flag can only be set by PMD. All procurements during the IT Strategic Planning process whether or not they have an APR attached or not will be approved as part of the agency’s Strategic Plan using the “Approval Business Alignment” tab (last tab). The APR portion of the procurement is not approved until the *CIO Approval of APR* flag is set to “Yes” by PMD.

The change solves an issue since there was only one approval on the form for two separate approvals, the Strategic Planning entry and the APR. When an APR comes in simultaneously with a strategic planning entry, CIO approval constitutes approval for both. There is a situation where agencies have filled out both the strategic planning tabs and APR tabs for procurement that will not occur until the next biennium. Once procurement was CIO approved, it no longer registered as an open APR on PMD tracking scorecards. The addition of a flag specific for APR approval allows PMD to accurately track APRs pending CIO approval.

Project Charter form:

The Project Charter form, Approvals tab (last agency tab) has a new group box at the bottom. The group box displays the original Charter approval timestamps (read only). This enhancement allows easy reference to the Charter (Approval for Development) approval dates for the project.

Charter Original Approval TimeStamps	
Business Sponsor Original Approval Date and Time:	<input type="text"/>
Agency Head Original Approval Date and Time:	<input type="text"/>
Secretariat Original Approval Date and Time:	<input type="text"/>
PMD Original Approval Date and Time:	<input type="text"/>
CIO Original Approval Date and Time:	<input type="text"/>
ITIB Original Approval Date and Time:	<input type="text"/>

(Fig 1 Charter Original Approvals)

Mandatory Required Field Enforcement:

In ProSight 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. In the past, only a warning was given to the user after submit was clicked, warning the user that mandatory categories had not been filled out. The user was able to click “OK” and submission was completed.

Now, 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 change ensures critical data is not missing from agency submissions.

Project Plan form Critical Path:

The Project Plan form, Critical Path tab (6th tab) had required a user to reenter all the milestone data to identify the critical path. Now, the milestone data entered from the Project Schedule is displayed. A user only has to identify if a milestone is on the critical path by choosing the value “Yes” in the last column entitled “Is the Milestone in the Critical Path?”.

The change reduces user data entry and capitalizes on ProSight’s ability to share data between forms.

Filtered Proponent Secretary/Proponent Agency Lists:

On all forms, after choosing a Proponent Secretary, the Proponent Agency list will now only display the agencies within that Secretariat, rather than all agencies.

This change increases usability and ease of navigation within the tool.

*Title:	<input type="text" value="xxx"/>
*Working Title:	<input type="text" value="xxx"/>
*Proponent Secretary:	180 Secretary of Administration
*Proponent Agency:	129 Department of Human Resources Management
*Prepared By:	132 State Board of Elections
*Date Finalized:	157 Compensation Board
Control Number:	169 Commonwealth Competition Council
	175 Virginia Office for Protection and Advocacy
	194 Department of General Services

	No Value

(Fig 2 Filtered Agency Proponent Listing)

Risk Management Plan forms and Budget Plan form redesign:

No categories changed on the forms, the change was in how category fields are presented to the user. The Risk Management Plan form tabs for Risk Management Plan Costs have been removed and placed into three new forms:

Risk Management Risk Costs FY06-08 & FY08-10 Bienniums

Risk Management Risk Costs FY10-12 & FY12-14 Bienniums

Risk Management Risk Costs FY14-16 & FY16-18 Bienniums

Each of the Risk cost forms has a General Information tab shared with the Risk Management Plan and two tabs for two biennium's' data.

In the Risk Management Plan, the Risk Analysis Summary tab has been split into multiple tabs by biennium. All the Risk Management Plan forms share data as required. The budget Plan has been reduced in size. All of the bidirectional Risk Cost tabs have been removed. Instead, a new tab "Risk Cost Totals FY06-18 has been created . This tab summarizes the total risk cost by FY taken from the analysis completed on the Risk Management Risk Costs FY06-08 & FY08-10 Bienniums, Risk Management Risk Costs FY10-12 & FY12-14 Bienniums, and Risk Management Risk Costs FY14-16 & FY16-18 Bienniums form. The risk cost totals can then be used to determine the quarterly spend plan contingency costs.

This change fixes the export and print problems for these two forms. Previously, the forms exceeded the maximum size of data transmittable over the COV network. The change also increases ease of use for both forms.

Other:

In the new deployed 64 bit version of ProSight, the internal ProSight Help (black task bar) and forms spell check features are non-operational. Oracle has corrected this in an upcoming patch. Business -configured Help is available through the Knowledge (light bulb), My ProSight processes and training materials.

Project Status form Approval Alerts

The Alerts use the COV electronic mail service to send messages, but relies on the Primavera Portfolios user contact email information provided in “User Settings”. The contacts must be authorized users belonging to a specific user group within Primavera Portfolios to use the provided Primavera Portfolios links.

Alerts are auto generated by agency and user group (agency) security permissions apply; i.e. all Alerts are built and generated by agency, and once emails are received, actions taken by agency users are limited to their user role and agency permissions

Note: These Alerts are all auto –generated. The agency user doesn’t have to do anything; just react to the email in your Outlook inbox when it arrives!

The project status from approval alerts are as follows:

1. Request for Project Manager Project Status Approval

Alert: XXX Agency Request for Project Manager Project Status Approval

This alert is auto generated on the 5th day of each month for active major projects if the PM has not already completed submission.

2. Request for Agency Sponsor Project Status Approval

Alert: XXX Agency Request for Agency Sponsor Project Status Approval

This alert is generated when the PM submits the Project Status report for Agency Sponsor approval.

3. Request for PMD/Secretariat Review/CIO Project Status Approval.

Alert: XXX Agency Request for PMD/Secretariat Review/CIO Project Status Approval

This alert is generated when the Agency Sponsor requests PMD/Secretariat Review/CIO Project Status Approval.

4. CIO Project Status Approval.

Alert: XXX Agency CIO Approval of Project Status Report

This alert is generated when CIO assessment and approval of the project status is completed.