



Virginia Information Technologies Agency

Commonwealth Technology Portfolio (CTP) – ProSight

ProSight 7 Clipboard Instructions



ProSight 7.0 New Feature

- New Tool feature:
 - Clipboard
 - Data exchange between Excel and ProSight
 - Copy & Paste within ProSight

ProSight 7.0 Data Exchange

- Data Exchange between MS Excel and ProSight
 - Entire ProSight Scorecards or tables from Forms, or blocks of data from these tables can be copied and pasted into Excel spreadsheets
 - Blocks of data in Excel spreadsheets can be copied and pasted into ProSight Scorecards or Form tables.



Data Exchange with Excel

- When pasting information, there is a Preview screen that allows you to see the new information, review automatic corrections and possible mismatches.

Data Exchange within ProSight

- In addition to copying and pasting to/from Microsoft Excel, you can use the copy & paste within ProSight
 - The scorecard/form table must have the same value types (e.g. integer, float, date, text, value list)
 - Must have security permissions for the item
 - Cannot paste into “locked” (hatched over) cells



Scorecards

- Whole scorecard or Form/Table—selects the scorecard or table in its entirety
 - Convenient when using the ProSight scorecard or table as the basis for the spreadsheet in Excel, as it includes the column headers and row titles
- To select the whole scorecard or table:
 - From the Clipboard menu on the Menu Bar, click Select Entire Scorecard or Select Table; or
 - Place the cursor in the scorecard or table and from the right-click menu, click Select Entire Scorecard or Select Table

Commonwealth Technology Portfolio (Development Suite)

Scorecard: 2 Baseline Report

Clipboard menu options: Select Entire Scorecard, Select All Cells, Copy, Paste, Clear

Items	Proponent Agency	Project Status
4 ● Central Criminal...	156 Department of State Police	Continuing
5 ● Customer Manag...	186 Secretary of Transportation	Continuing
6 ● Document Manag...	183 Secretary of Natural Res...	Continuing
7 ● DRES-Real Estate...	180 Secretary of Administration	Continuing
8 ● EAGLES	192 Secretary of Commerce a...	Continuing
9 ● FMS Project	186 Secretary of Transportation	Continuing
10 ● Integrated Case ...	188 Secretary of Health & Hu...	Continuing
11 ● Integrated Fiscal ...	188 Secretary of Health & Hu...	Continuing
12 ● Integrated Fores...	193 Secretary of Agriculture ...	Continuing
13 ● Law Enforcement...	187 Secretary of Public Safety	Continuing
14 ● Pavement Manag...	186 Secretary of Transportation	Continuing
15 ● Phase 2 and 3 Vir...	187 Secretary of Public Safety	Continuing

Commonwealth Technology Portfolio (Development Suite)

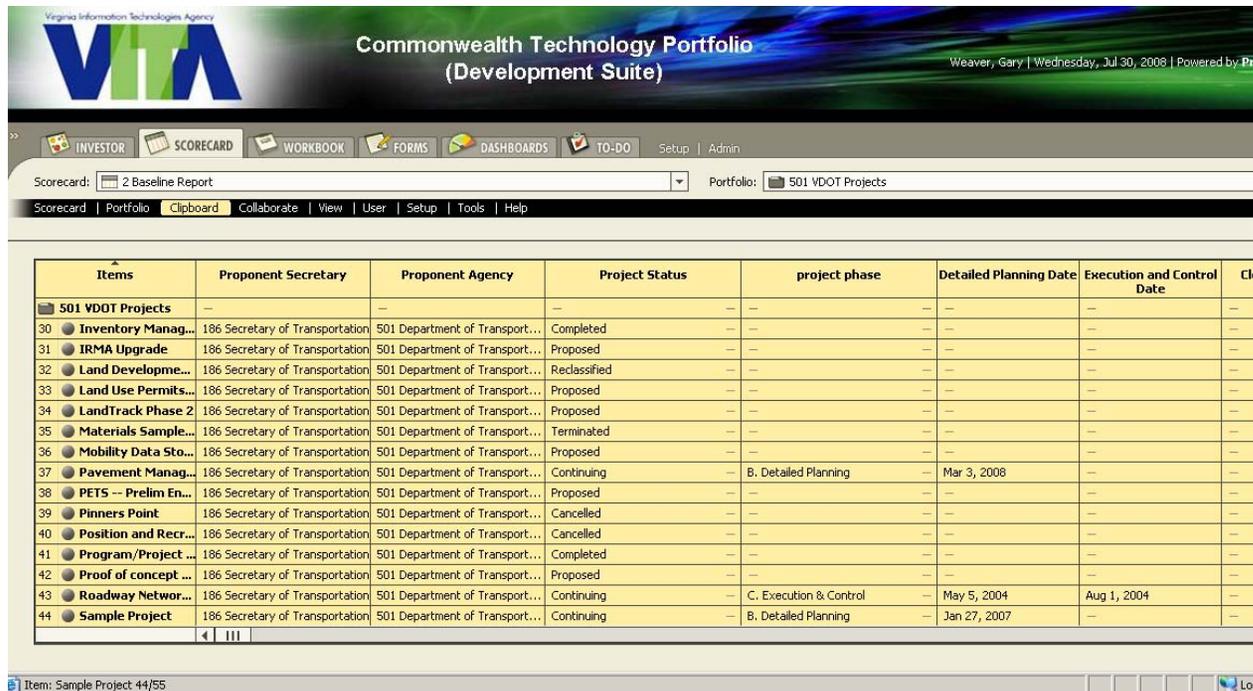
Form: Project Status

Clipboard menu options: Select Table, Copy Selection, Paste, Clear

Planned Value & Actual Costs	Planned Cost to Date	Actual Cost to Date
Internal Staff Labor	14,695,572.46	
Services	379,450,394.44	
Software Tools	7,120,825.42	
Hardware	3,392,119.14	
Maintenance	780,827.00	
Facilities	512,170.00	
Telecommunications	447,000.00	
Training	638,127.28	
IV&V	617,553.00	
Contingency Risk		
Total	2,168,619.69	

Whole Scorecards & Form/Tables

- The whole scorecard or table is selected and highlighted in yellow.
- The total number of rows x columns is noted on the status line



Commonwealth Technology Portfolio (Development Suite)

Scorecard: 2 Baseline Report | Portfolio: 501 VDOT Projects

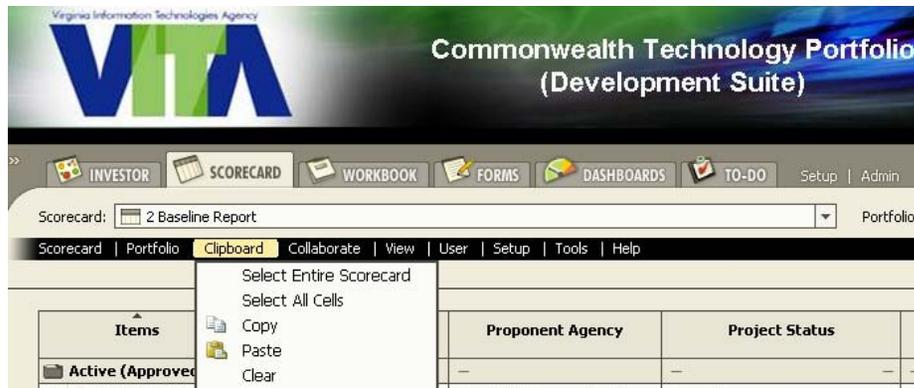
Items	Proponent Secretary	Proponent Agency	Project Status	project phase	Detailed Planning Date	Execution and Control Date	Cl
501 VDOT Projects	—	—	—	—	—	—	—
30 Inventory Manag...	186 Secretary of Transportation	501 Department of Transport...	Completed	—	—	—	—
31 IRMA Upgrade	186 Secretary of Transportation	501 Department of Transport...	Proposed	—	—	—	—
32 Land Developme...	186 Secretary of Transportation	501 Department of Transport...	Reclassified	—	—	—	—
33 Land Use Permits...	186 Secretary of Transportation	501 Department of Transport...	Proposed	—	—	—	—
34 LandTrack Phase 2	186 Secretary of Transportation	501 Department of Transport...	Proposed	—	—	—	—
35 Materials Sample...	186 Secretary of Transportation	501 Department of Transport...	Terminated	—	—	—	—
36 Mobility Data Sto...	186 Secretary of Transportation	501 Department of Transport...	Proposed	—	—	—	—
37 Pavement Manag...	186 Secretary of Transportation	501 Department of Transport...	Continuing	B. Detailed Planning	Mar 3, 2008	—	—
38 PETS -- Prelim En...	186 Secretary of Transportation	501 Department of Transport...	Proposed	—	—	—	—
39 Pinners Point	186 Secretary of Transportation	501 Department of Transport...	Cancelled	—	—	—	—
40 Position and Recr...	186 Secretary of Transportation	501 Department of Transport...	Cancelled	—	—	—	—
41 Program/Project ...	186 Secretary of Transportation	501 Department of Transport...	Completed	—	—	—	—
42 Proof of concept ...	186 Secretary of Transportation	501 Department of Transport...	Proposed	—	—	—	—
43 Roadway Networ...	186 Secretary of Transportation	501 Department of Transport...	Continuing	C. Execution & Control	May 5, 2004	Aug 1, 2004	—
44 Sample Project	186 Secretary of Transportation	501 Department of Transport...	Continuing	B. Detailed Planning	Jan 27, 2007	—	—

Item: Sample Project 44/55



Scorecard Cell selection

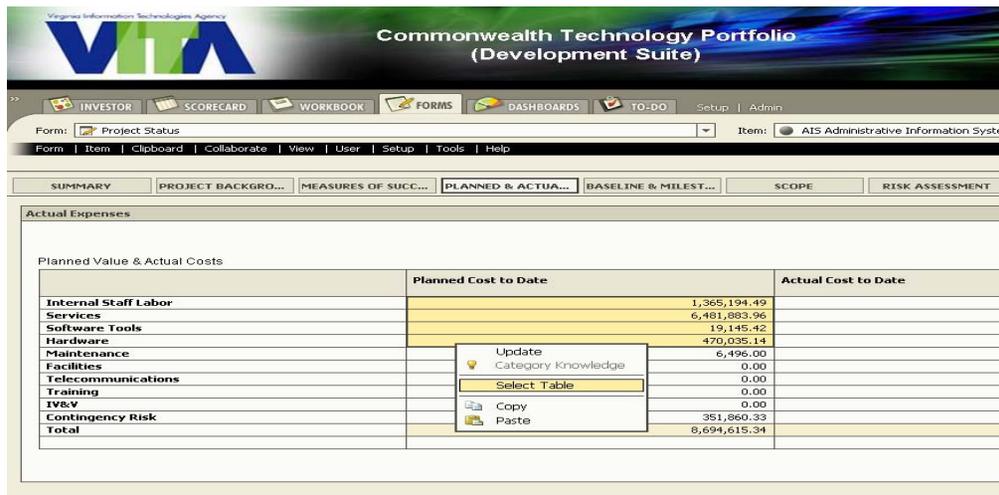
- Place the cursor in the scorecard and from the Clipboard right-click menu, click Select All Cells – selects the entire scorecard or form/table with the exception of the headers



- Or from within the scorecard:
 - Partial selection-column— Left click on the header of a column to select the entire column
 - Partial selection- row— Left click on the title of a row to select the entire row
 - Left click (hold) and drag allows selection of any area within scorecard

Form/Table Selection

- From the Clipboard menu on the Menu Bar, click Select Table; or
- Place the cursor in the table and from the right-click menu, click Select Table



The screenshot shows the 'Commonwealth Technology Portfolio (Development Suite)' interface. The 'FORMS' menu is active, and the 'Project Status' form is open. The 'PLANNED & ACTUA...' tab is selected, displaying a table titled 'Actual Expenses' with columns for 'Planned Value & Actual Costs', 'Planned Cost to Date', and 'Actual Cost to Date'. A right-click context menu is open over the 'Planned Cost to Date' column, with 'Select Table' highlighted.

Planned Value & Actual Costs	Planned Cost to Date	Actual Cost to Date
Internal Staff Labor	1,365,194.49	
Services	6,481,883.96	
Software Tools	19,145.42	
Hardware	470,035.14	
Maintenance	6,496.00	
Facilities	0.00	
Telecommunications	0.00	
Training	0.00	
IT&V	0.00	
Contingency Risk	351,860.33	
Total	8,694,615.34	

- Or from within the table:
 - Partial selection-column— Left click on the header of a column to select the entire column
 - Partial selection- row— Left click on the title of a row to select the entire row
 - Left click (hold) and drag allows selection of any area within table

Copy & Paste in Scorecard & Form/Table

- Copy:
 - From the Clipboard menu on the Menu Bar, click Copy; or
 - From the right-click menu click Copy; or
 - Use the Ctrl +C keyboard shortcut
- Paste:
 - From the Clipboard menu on the Menu Bar, click Paste; or
 - From the right-click menu click Paste; or
 - Use the Ctrl +V keyboard shortcut

Paste Verify

- The selected cells are pasted into the scorecard or form/table and the Verify Paste dialog appears:

Items	Install Year	Recommended Action	Application Priority Index	Application Value Index	Funding Status	Estimated Alternative Improvement
All Application Inves...	--	--	293 ★	192	Funded	6 ●
1 Accounting Data...	1997	Outsource	229	144	Proposed	4 ●
2 Accounts Payabl...	2003	Maintain	345 ★	215	Proposed	4 ●
3 Accounts Payabl...	1985	Decommission	197	132	Funded	4 ●
4 Accounts Receiv...	1999	Maintain	477 ★	307 ★	Funded	2 ●
5 Accounts Receiv...	1987	Decommission	28	17	Proposed	3 ●
6 Adverse Experien...	1987	Maintain	225	125	Proposed	2 ●
7 APC Plant Control...	1988	Decommission	59 ●			3 ●
8 Asset Managemen...	1989	Maintain	506 ★			3 ●
9 Back-up & Recov...	last year	Outsource	409 ★			--
10 BPM System	1987	Maintain	477			--
11 Business Conting...	1987	Decommission	28			--
12 Call Center System	1988	Maintain	225			--
13 Clinical Trials Sys...	1990	Decommission	59 ●			4 ●
14 Collections Mana...	1991	Maintain & Upgrade	271			--
15 Content Manage...	2005	Build	493 ★			--
16 CRM System	1991	Maintain & Upgrade	379 ★			4 ●
17 Customer Self Se...	1991	Evaluate	410 ★			2 ●
18 Data Modeler	--	Evaluate	483 ★			3 ●

Verify Paste

Total paste area: 6 columns by 15 rows

✘ Unable to paste 6 cells

Cells to be pasted:

- ✓ 71 Unchanged value
- ✓ 10 New value
- ✓ 3 New value with adjustment

Enable paste without red cells

Report... Accept Reject

Verify Paste

Total paste area: 6 columns by 15 rows

Cells to be pasted:

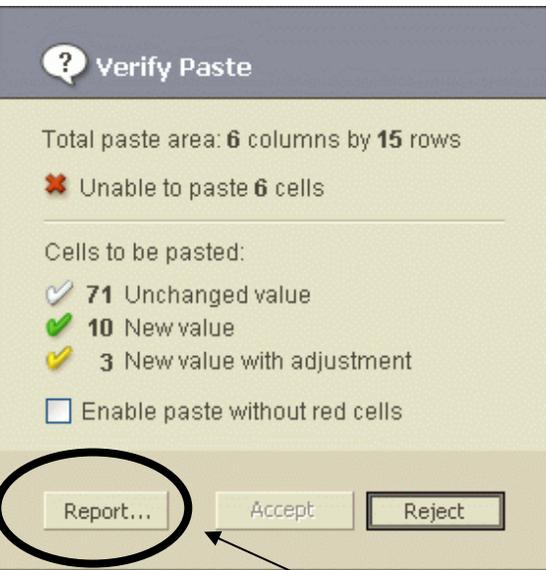
- ✓ 71 Unchanged value
- ✓ 10 New value
- ✓ 3 New value with adjustment

Report... Accept Reject

- Two Verify Paste views;
 - Accept if cells can be pasted,
 - Reject if cells cannot be pasted

- White background-- the data in the cell is unchanged
- Green background-- the data in the cell was successfully pasted and appears in bold font
- Red background—the new value cannot be pasted and is seen crossed-out in the cell
- Hovering above the cell lets you see the old and new values, and the reason if the value cannot be pasted in a tooltip

Verify Paste



- Red "X" -- the number of cells that cannot be pasted
- White check mark-- the number of cells unchanged
- Green check mark-- the number of cells that were pasted successfully with no adjustment
- Yellow check mark-- the number of cells that were pasted successfully with automatic adjustment* (*integer rounding)
- Checking the Box “Enable paste without red cells” allows paste to be accepted

- Report—generates a full report that can be filtered to view the paste results

Scorecard Paste Report

- Scorecard Paste Report—generates a full report that can be filtered to view the paste results:
 - Title— name of the scorecard and the portfolio into which the paste was done
 - Info Line—shows it is a scorecard paste report, the name of the logged-in user and the date of the report
 - Pasted Cells—allows you to filter the Displayed Cells by four checkboxes: White, Green, Yellow and Red
 - Item Name-- shows the item names
 - Categories--shows the scorecard's column names (categories) in order
 - Current Value -- shows the current value for the cell
 - New Value -- shows the new value/indicator for the cell
 - The status of the paste colors the background “Red” cells show their value crossed out
 - Result -- White cells show a dash; Green cells show OK; Yellow cells show Conversion-(what was done); Red cells show Error and the reason for the error



Scorecard Paste Report Example

Scorecard Paste Report

Data pasted by <logged in User> into <Scorecard Name>, Sep 23, 2007

Pasted Cells		Displayed Cells: <input checked="" type="checkbox"/> White <input checked="" type="checkbox"/> Green <input checked="" type="checkbox"/> Yellow <input checked="" type="checkbox"/> Red			
#	Item Name	Categories	Current Value	New Value	Result
17	Accounts Receivable (Legacy)	Strategy Score %	35	35	-
		Risk Score %	55	63	OK
		Priority	High	High	Error: Pasted data is not part of the values list
		Funding Status	Proposed	Funded	OK
		Life Cycle	Operational	Operational	-
		Budget	73,000,000	73,000,000	Error: Pasted data is not a numeric value
		Cost Indicator	★	●	OK
18	Automated Audit Reporting	Strategy Score %	56	55	Conversion: Value was rounded
		Risk Score %	79	79	-
		Priority	Medium	Super	Error: Pasted data is not part of the values list
		Funding Status	Proposed	Funded	OK
		Life Cycle	Concept	Design	OK
		Budget	4,700,000	4,700,000	-
		Cost Indicator	★	●	Error: Pasted data is not an indicator
19	Customer Self Service	Strategy Score %	64	67	Conversion: Value was rounded
		Risk Score %	84	84	-
		Priority	Low	Medium	OK
		Funding Status	Funded	Funded	-
		Life Cycle	Phase Out	Postmortem	Error: Pasted data is not part of the values list
		Budget	37,675,000	37,675,000	-
		Cost Indicator	●	●	-

Form Paste Report

- The Table Paste Report includes the following areas:
 - Title— name of the table and the item into which the paste was done
 - Info Line 1—shows the name of the form and the tab
 - Info Line 2— shows it is a table paste report, the name of the logged-in user and the date of the report
 - Pasted Cells—allows you to filter the Displayed Cells. There are four checkboxes: White, Green, Yellow and Red.
 - #Row—the number and label of the table row
 - Column-- the names (or labels) of the categories in the table
 - Current Value—shows the current value for the cell
 - New Value—shows the new value/indicator for the cell
 - The status of the paste colors the background. “Red” cells show their value crossed out
 - Result—White cells show a dash; Green cells show OK; Yellow cells show Conversion-(what was done); Red cells show Error and the reason for the error



Table Paste Report Example

table1 (Table) / Candidate item (Item)

Found in Form/Tab: Form1(Required fields must be completed on all tabs) / tab2 for form1

Table Paste Report, printed by: System Administrator, Nov 7, 2007

Pasted Cells	Displayed Cells:	<input checked="" type="checkbox"/> White	<input checked="" type="checkbox"/> Green	<input checked="" type="checkbox"/> Yellow	<input checked="" type="checkbox"/> Red
# Row	Column	Current Value	New Value	Result	
1 Value	Float1	—	10:55	OK	
	Integer-1	—	16:25	OK	
2 Indicator	Float1	—	—	—	
	Integer-1	—	—	—	
3 Annotation	Float1	—	8:35	OK	
	Integer-1	—	18:25	OK	
4	Float1	—	8:40	Error:Only unchanged data can be pasted in this cell type	
	Integer-1	—	17:50	Error:Only unchanged data can be pasted in this cell type	

Best Practices

- It is best to base the Microsoft Excel sheet on a paste from ProSight
 - Ensures updates pasted from Microsoft Excel back into ProSight are sure to fit in smoothly
- The Paste Preview should be reviewed with care as pasted data is automatically checked for data type correlation, not content
- In Scorecards, once the user accepts the paste, the new data replaces the old
 - The only way to retrieve previous data is from a database backup!
- In Forms/tables the new data replaces the old data in the table
 - However, as there is a need to “Submit” the form data, it is still possible to rescind the paste after accepting it



Contact Information

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