

# ProSight Orientation and Navigation

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## Section 1 ProSight Basics

### Login to ProSight Portfolios 6.0

Enter `https://<servername>/prosight` into your browser.

The *ProSight Log on* window is displayed below.



Type “*assigned user name*” for the User Name.

Type “*assigned password*” for the Password.

Press “**Enter**” or click “**Go!**”

Press “**Enter**” after reading the Login Message screen.

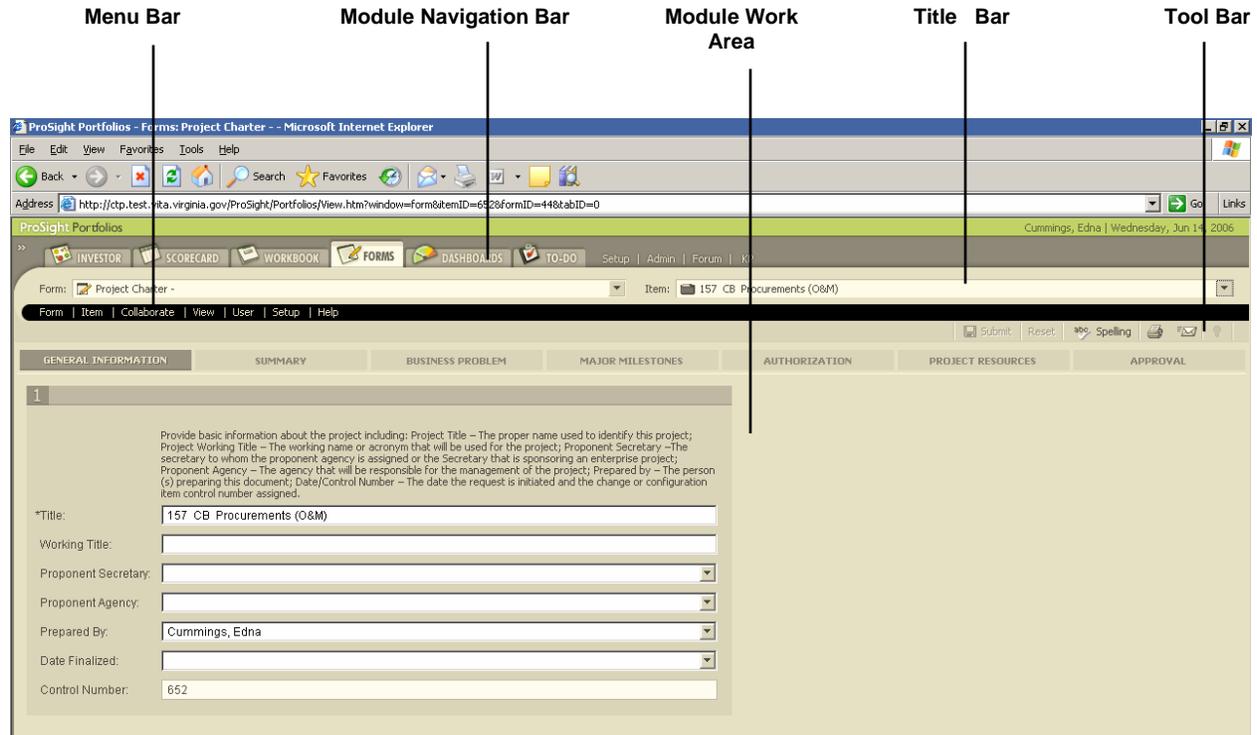
# ProSight Orientation and Navigation

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## The Main Screen

When you log on to ProSight Portfolios, the Main screen appears displaying the last module viewed in your previous session or your default entry module.

The Main screen includes a Menu bar, Module Navigation bar, Module Work Area, Title bar, and Tool bar. You can choose the module you want to work with by clicking its icon on the Module Navigation bar. The remainder of the Main screen consists of the current module's workspace.



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## The Menu Bar

The menu bar changes from module to module and allows the user to edit and create new items, send forms and access other user functions. Below is an example of the menu bar from the **Forms Module**.



The menu bar provides access to user functions, and ProSight Portfolios online help.

To print the current form and data choose the **Form → Print** menu option. You can also export the form and data to a Word document by selecting **Form → Export**.



## Upload Documents:

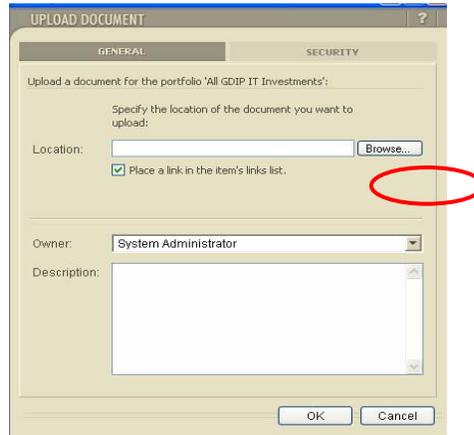
For example, to attach a document to a form and additional details for justification, choose **Item → Upload Document**



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Click **Browse** to upload documents.



## View All Uploaded Documents

To view all of the documents that are included with the Business Case choose **Item** → **Documents** menu. You can Add and Remove attached documents.



### E-mail

To e-mail a page, choose **'Collaborate'** on the menu bar.

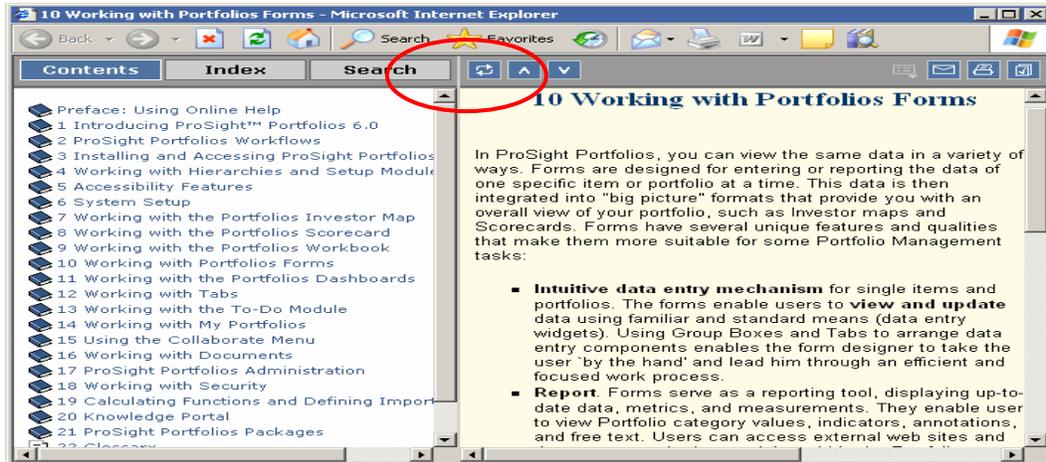


### Help Function

To access the help function, click on **'Help'** from the menu bar.

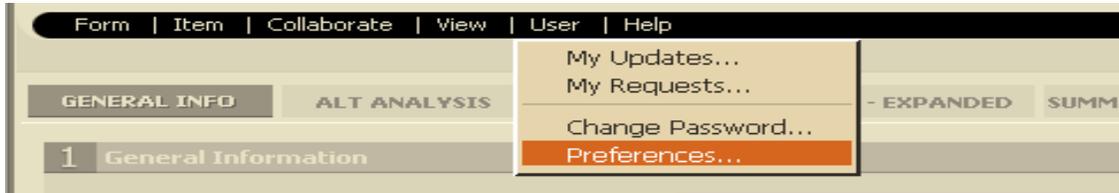


A screen appears to allow you to search a topic.

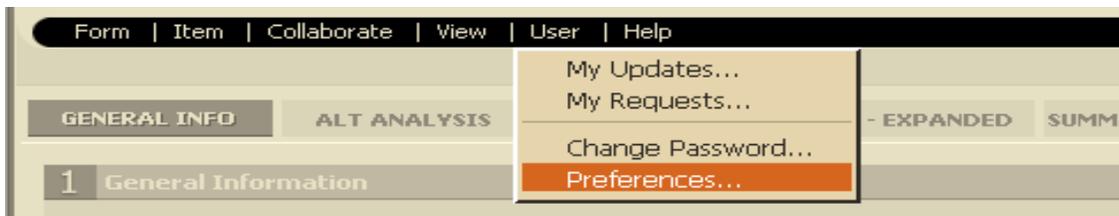


## User Accounts-Setup

To setup your User Account information, select **User** → **Preferences**:



To update User Profile information, choose the **User** → **Preferences** menu.



The following screen appears to allow personal information updates.



To change your password, choose the **User** → **Change Password** menu.



The screen appears for you to enter your login name and password.

The screenshot shows a window titled "USER" with a sidebar on the left containing a list of settings categories: General, Password, Preferences, Accessibility, Contact, and Security. The "Password" category is selected and expanded. The main area of the window is titled "Set password for Training #1:" and contains four input fields: "Login Name:" with the text "training1", "Old Password:" (empty), "Password:" (filled with 10 dots), and "Confirm Password:" (filled with 10 dots). At the bottom of the window are four buttons: "Cancel", "< Back", "Next >", and "Finish".

## The Module Navigation Bar



The module navigation bar allows users to select a module. To open a module, click the icon in that Navigation bar. The browser window displays the new module. Below summarizes the Module segments:

- **Investor:** An analytical module that allows portfolio managers and executives to analyze the portfolio graphically against business objectives or other strategic parameters.
- **Scorecard:** An analytical reporting module that allows the reviewers and portfolios managers to view all initiatives across a portfolio in order to compare and analyze specific data entered within the portfolio.
- **Workbook:** Provides the item summary detail for an individual Item. It includes information on each phase in the item life cycle, phase deliverables, team members and action items for the item.
- **Forms:** The data entry module that allows the to enter business case data for projects and procurements
- **Dashboards:** A collection of graphs to track and assess selected parameters of attributes. The graphs can display trends or distribution of the specified parameters or categories in a set of items.
- **To Do:** Summarizes any outstanding work to perform within ProSight Portfolios, action items, deliverables and cell updates.

## Module work Area

The Module Work Area is the content of the module the user selected and contains the project or procurement information configured for that module. Below is an example of the Scorecard and Dashboard Module work areas.

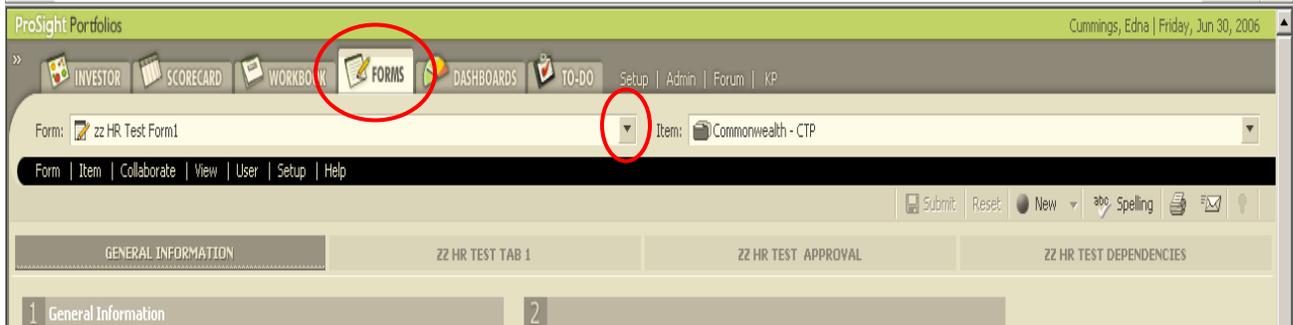




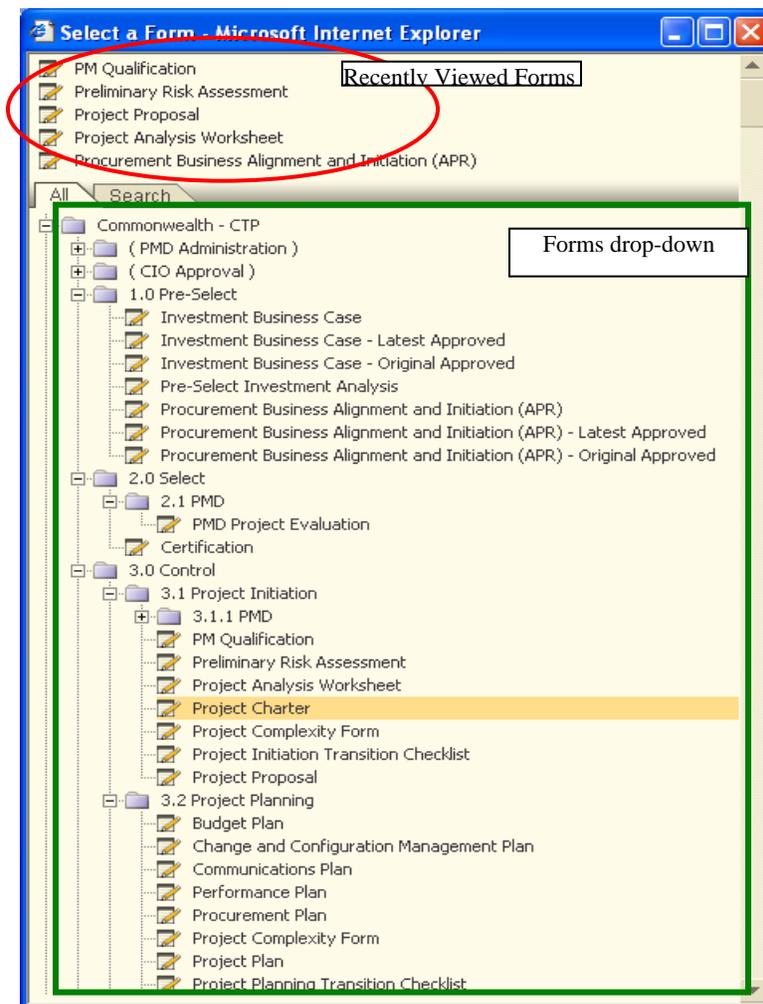
## Title Bar – Selecting What You Want to Do and the Corresponding Data or Item

The Title Bar allows users to select the specific form, scorecard, or workbook and the corresponding data (Item). Below is an example of selecting the Form Module and the accompanying forms from the Form drop down menu.

**Select Module then chose the Form from the Forms drop down menu.**

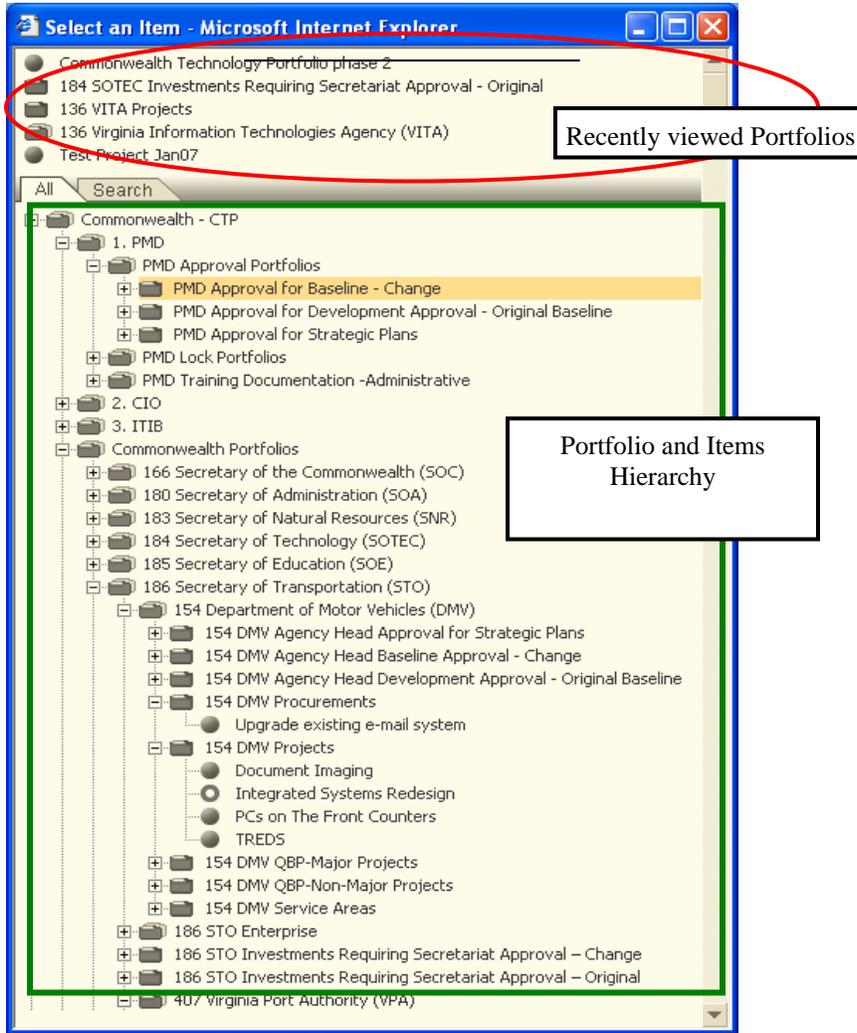


The drop down menu appears.



To get to the actual data, the user must choose which **portfolio** to open. The Title Bar allows the user to choose which portfolio to open and to select the appropriate data (item). Remember, this data will appear format determined by the module previously selected on the left hand side of the Title Bar. The Item drop down menu will display two views. The upper part of the list displays the most recently viewed items. The bottom part of the list lets the user choose an item from the item's hierarchy or search for a specific item or object. To select an item or portfolio, use the drop down menu.



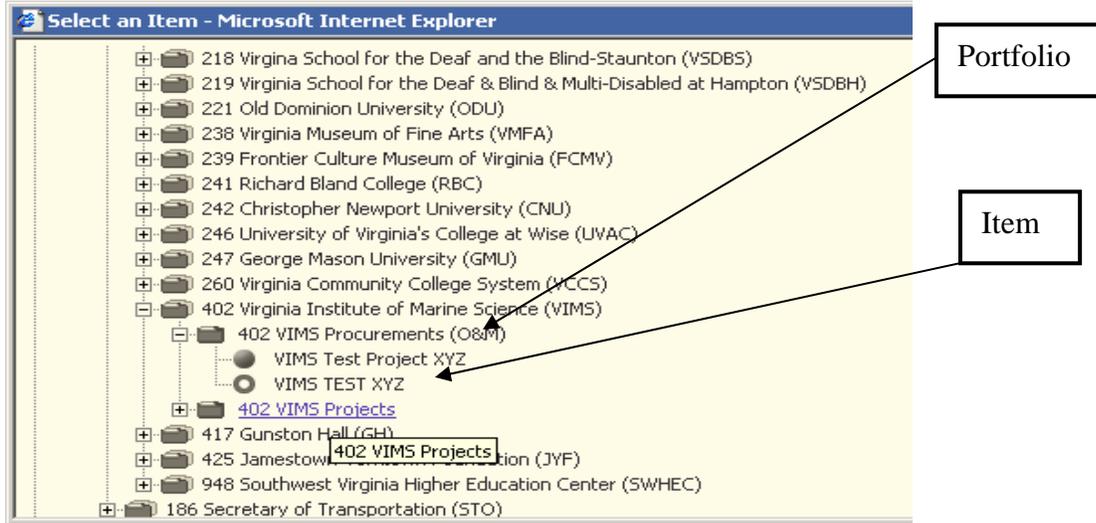


Click on the '+' to expand each **PORTFOLIO** until you find your project and highlight the project. If you have permission to view that project, it becomes the active project on all forms you view.



## PORTFOLIO AND ITEM ORGANIZATION

In ProSight Portfolios, an **Item** is a term used for the lowest record for which data is collected. Therefore, a project or procurement are **Items** in ProSight and are part of the **CTP Portfolios**. A **Portfolio** is a group of items.



### Portfolio Legend:

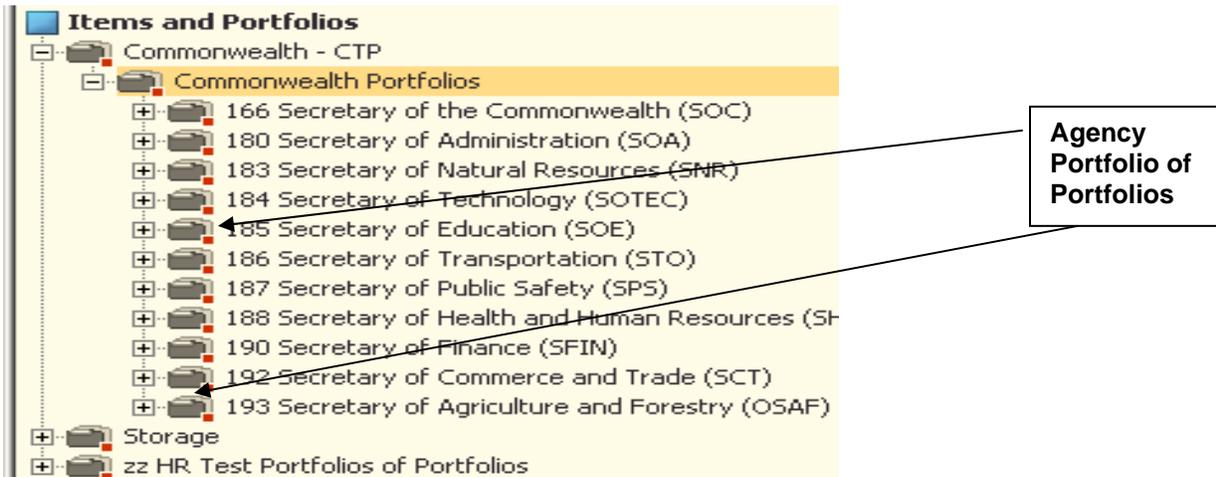


**Portfolio of Portfolios:** Highest Hierarchy or "Parent" indicated by a dark and shaded double folder. Contains several portfolios

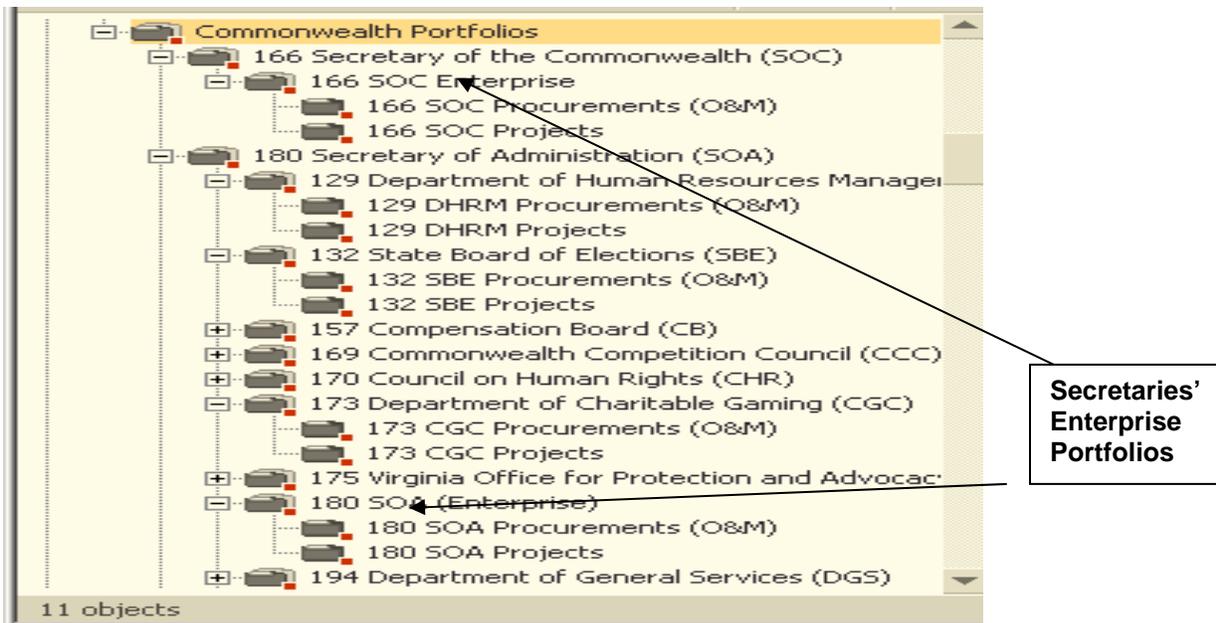
**Portfolio Items:** "Child" hierarchical relationship to Parent portfolio. Contains individual items; indicated by dark single folder.

**Items:** Projects or Procurements

The *CTP Portfolios* are organized by Secretaries as *Portfolio of Portfolios*.



Each Secretary has a *Portfolio of Items* for enterprise assets.

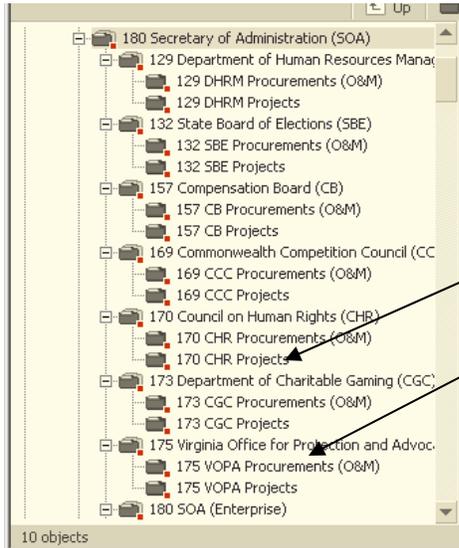


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Each Agency has a Portfolio of *Items* consisting of Project and Procurements. These portfolios are dynamic. Investments can move in and out of the portfolios based upon approvals, reviews, classifications and other portfolio characteristics.

- Procurements not associated with projects or those specifically for Operations and Maintenance activities; and
- Projects for IT investments, including the associated procurements.



**Portfolio of Items:  
Procurements and  
Projects**

### The Tool Bar

The toolbar allows you to Save, Reset Spell check, Print and E-mail information.



- **Submit** – This button will **save** all the data you have currently typed into the form. Nothing you typed is saved until you hit this button. ProSight will not allow you to move the form to another location until you have saved the data.
- **Reset** – This button will clear all the data you have currently typed into the form. Since nothing you have typed is saved until you hit submit described above, **reset** clears all the changes. However, it does not clear the entire form, only the changes since the last time you used submit.
- **Spelling** – This key activates the spell checker.
- **Print** – This key activates the print function. It does not print the document exactly, but opens up an html report in a new window, and then opens up a printer selection window. Thus, you could continue to print the report, or cancel, but then copy and paste the report into a word processor. Note that in this function, all tabs in the form will be printed, not just the tab showing on the screen. [Under the Form menu choices, you can **export** the report directly to MS Word].
- **Email** – This key will allow you to email a view to another ProSight user. The email address used is based on the user address that is set up in ProSight.

To **e-mail** a link to the current Item to a ProSight user, choose the Send Page button

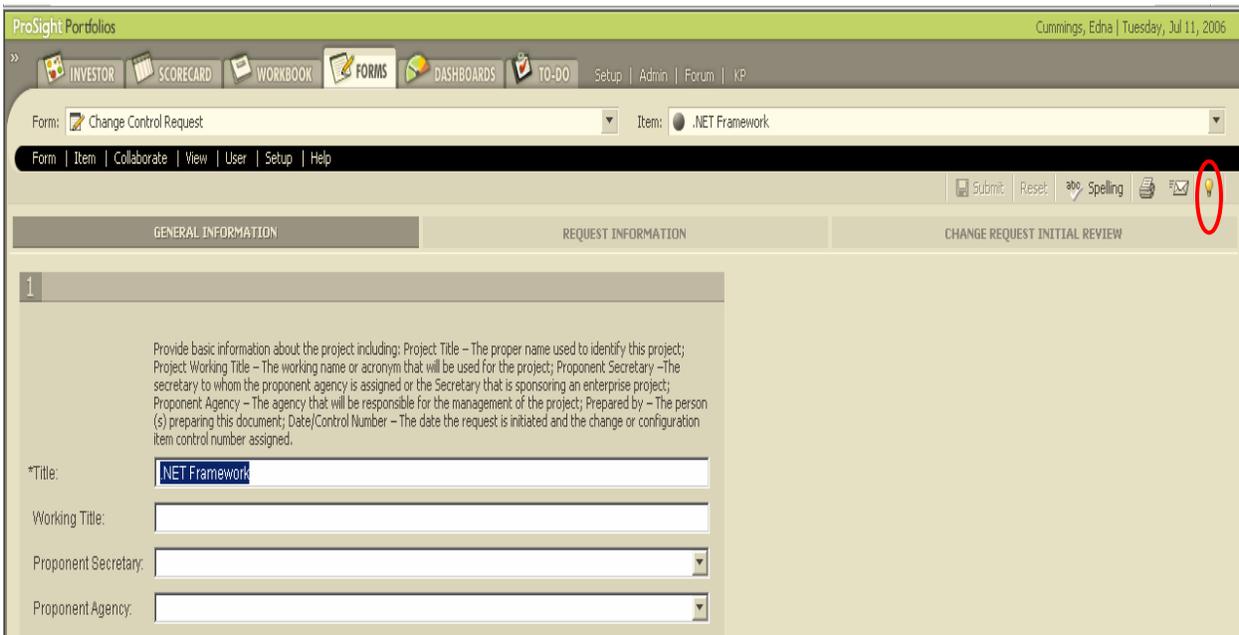


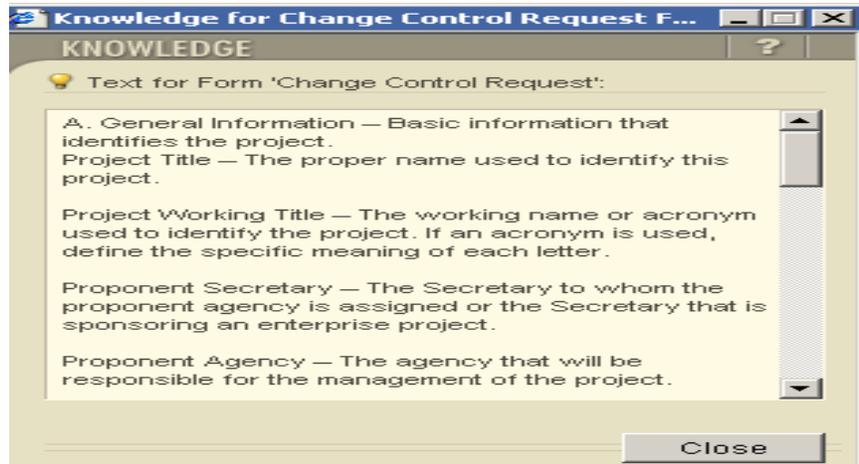
An e-mail screen appears for you to compose and send a message.

# ProSight Orientation and Navigation



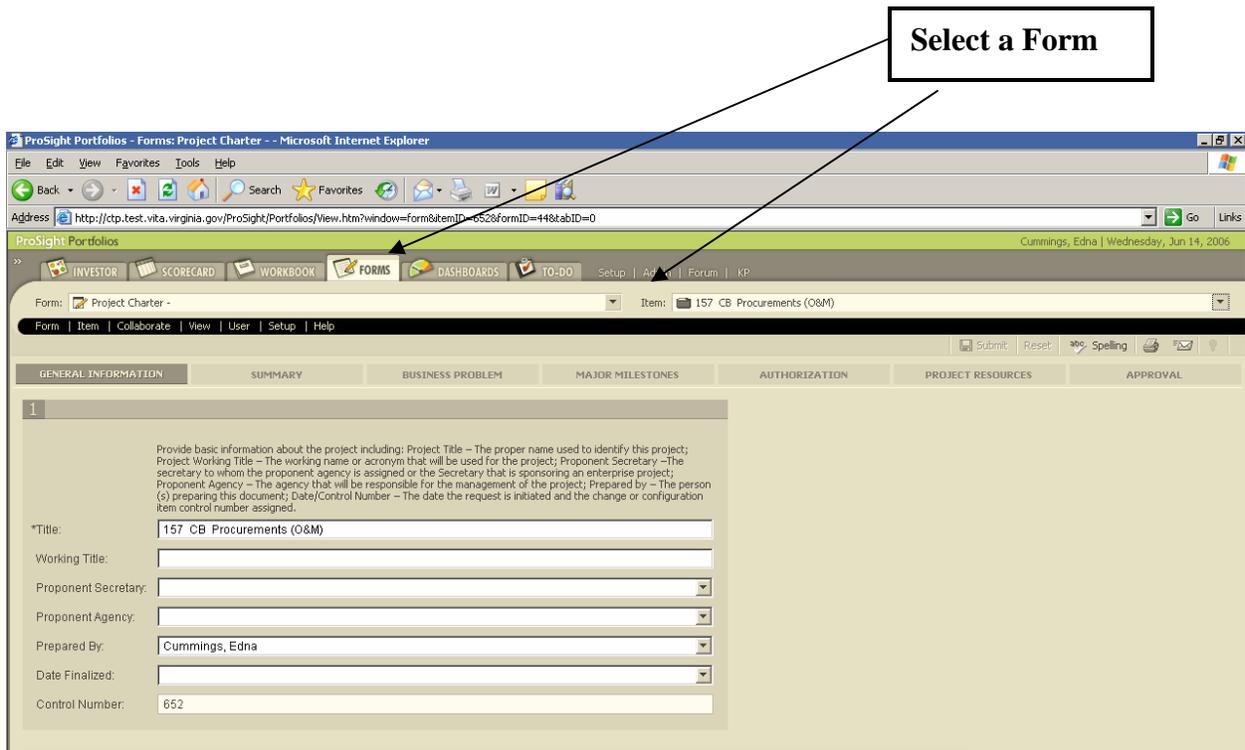
**Knowledge** is an information repository unique to the current display. When the light bulb is yellow or visible, then information pertaining to the current display is available. The example below shows the instructions or **Knowledge** about the **Change Control Request** form.



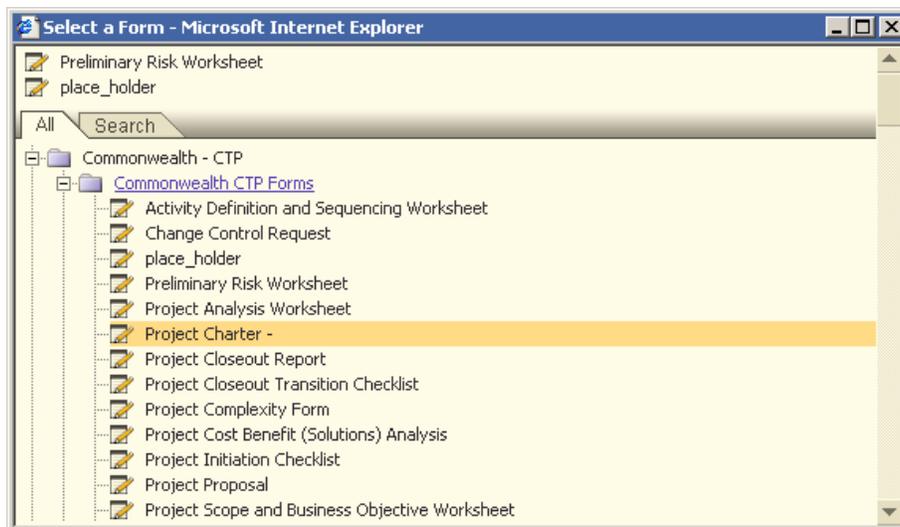




# ProSight Orientation and Navigation

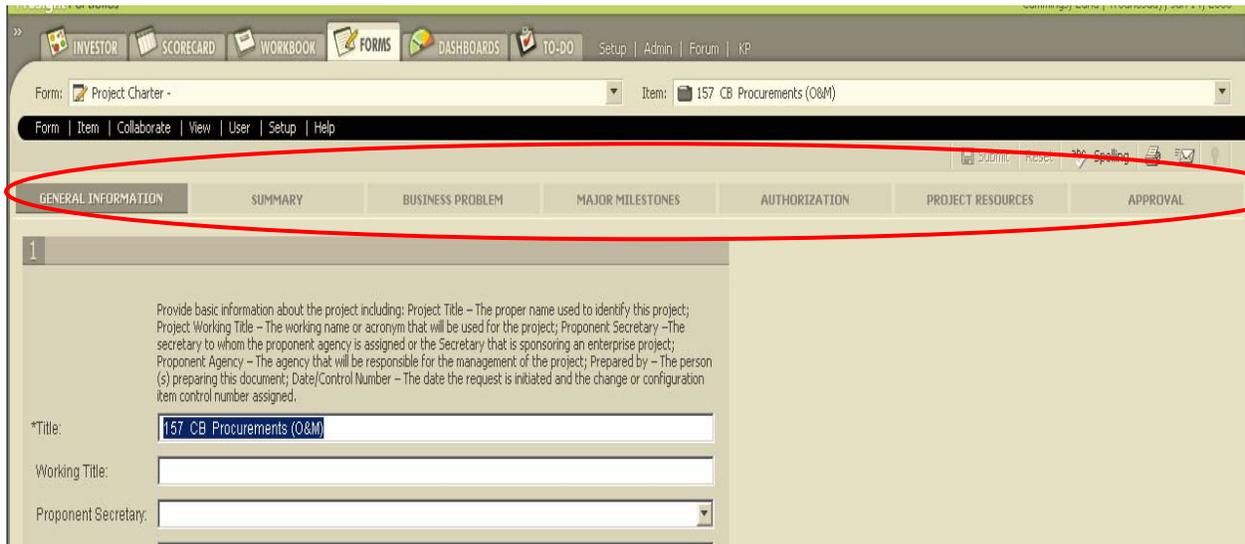


The CTP form menu list appears.



### FORM TABS

Form Tabs are the segments of the form that contain specific information. To select a Form Tab, click that Tab.



The screenshot displays the ProSight software interface. At the top, there is a navigation bar with icons for INVESTOR, SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO. Below this, a dropdown menu shows 'Form: Project Charter -' and 'Item: 157 CB Procurements (O&M)'. A secondary menu includes 'Form', 'Item', 'Collaborate', 'View', 'User', 'Setup', and 'Help'. The main content area features a row of tabs: 'GENERAL INFORMATION', 'SUMMARY', 'BUSINESS PROBLEM', 'MAJOR MILESTONES', 'AUTHORIZATION', 'PROJECT RESOURCES', and 'APPROVAL'. The 'GENERAL INFORMATION' tab is highlighted with a red oval. Below the tabs, there is a text area with instructions: 'Provide basic information about the project including: Project Title - The proper name used to identify this project; Project Working Title - The working name or acronym that will be used for the project; Proponent Secretary - The secretary to whom the proponent agency is assigned or the Secretary that is sponsoring an enterprise project; Proponent Agency - The agency that will be responsible for the management of the project; Prepared by - The person (s) preparing this document; Date/Control Number - The date the request is initiated and the change or configuration item control number assigned.' Below this text are three input fields: '\*Title:' with the value '157 CB Procurements (O&M)', 'Working Title:', and 'Proponent Secretary:'.

A form may have one tab or multiple tabs. The tabs are used to improve organization of the form. You can click on a specific tab to go to that point.

The ProSight back end is a Standard Query Language or SQL server database and the forms provide access into the database cells. Therefore, the data cells are limited to text, with some special alpha numeric text. However, formatting is not allowed.

Some data cells have a pull-down menu arrow allowing you to choose from a menu (only). Other cells you can click on and the cursor appears allowing you to type in entries. If the field is colored rather than white, this means either the cell is calculated or you have read only access to the cell. If there is a 'lock' in the field, then you do not have read access to the data. A form with a pull down menu is shown below:

# ProSight Orientation and Navigation

Forms: Project Plan

Form | Item | Collaborate | View | User | Setup | Help

Item: 166 SOC Projects

GENERAL INFORMATION SUMMARY PERFORMANCE CRITICAL PATH PROJECT FINANCE... PROCUREMENT & R... DOCUMENT STORA... CONTACTS APPROVAL

1

Provide basic information about the project including: Project Title – The proper name used to identify this project; Project Working Title – The working name or acronym that will be used for the project; Proponent Secretary – The secretary to whom the proponent agency is assigned or the Secretary that is sponsoring an enterprise project; Proponent Agency – The agency that will be responsible for the management of the project; Prepared by – The person (s) preparing this document; Date/Control Number – The date the request is initiated and the change or configuration item control number assigned.

\*Title: 166 SOC Projects

Working Title:

Proponent Secretary:

Proponent Agency:

Prepared By:

Date Finalized:

Control Number:

Commonwealth Competition Council  
Compensation Board  
Council on Human Rights  
Department of Charitable Gaming  
Department of Employment Dispute Resolution  
Department of General Services  
Department of Human Resources Management  
Department of Testing  
State Board of Elections  
97 Options

Submit

If the data is in a table, you must double-click on the cell to enter the data. A menu arrow will appear if there is a pull-down menu for the data in that cell. If the cell is calculated or you only have read access to, then when you double-click it will become shaded.

Shown below are examples of mandatory fields and fields that you can't edit.

## Mandatory Fields

KEY METRICS UPDATE FINANCIALS UPDATE ALIGN

1 Item Identification

\*Item Name: CB Server Migration Project

Technology Project Number: IT13972

2 Item Status

Status: Candidate

\*Plan Status:

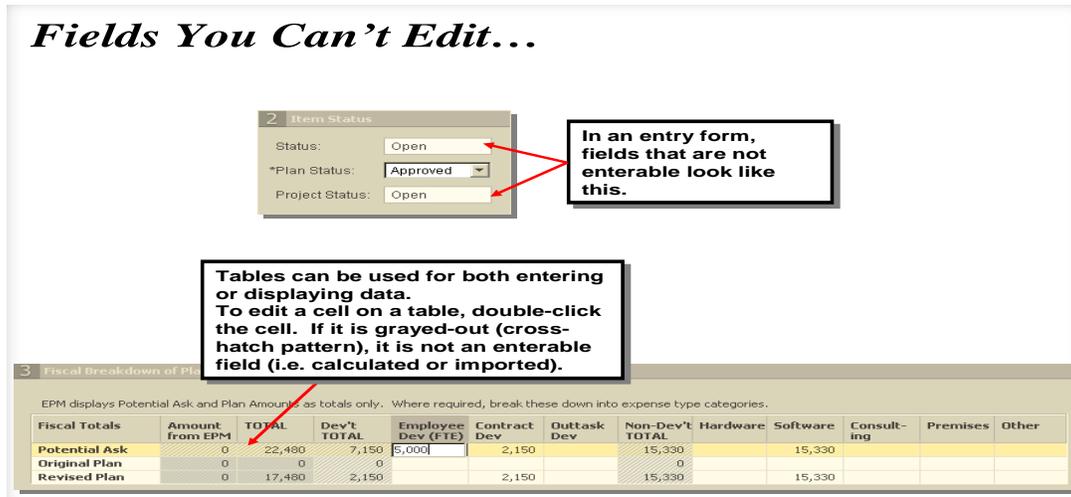
3 Fiscal Breakdown of Planning Amounts

EPM displays Potential Ask and Plan Amounts as totals only. Where required, break these down into expense type categories.

Fiscal Totals	Amount from EPM	TOTAL	Dev't TOTAL	Employee Dev (FTE)	Contract Dev	Outtask Dev	Non-Dev't TOTAL	Hardware	Soft
Potential Ask	0	22,480	7,150	5,000	2,150		15,330		15,330
Original Plan	0	0	0	asdf	;		0		
Revised Plan	0	17,480	2,150		2,150		15,330		15,330

Mandatory fields are marked with an \* asterisk.

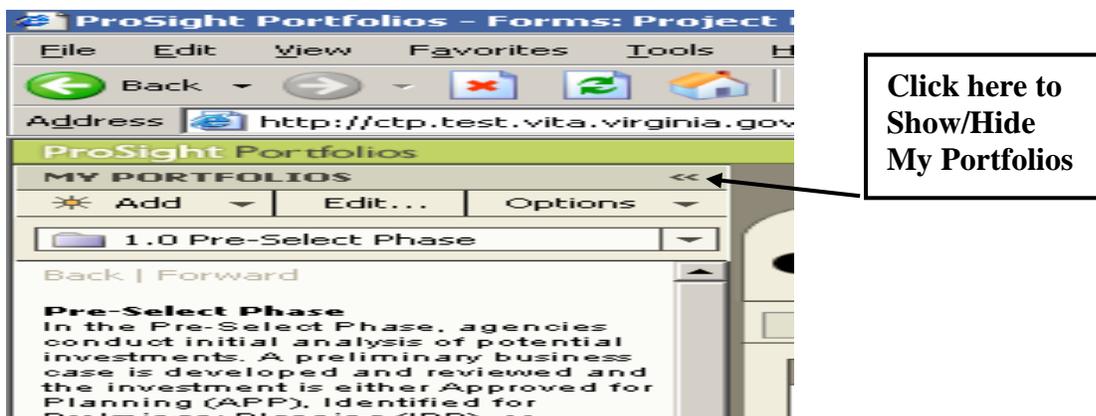
When a mandatory field is not filled in, a red squiggly line appears under the field's name when the form is submitted as an error indication.



## ACCESSING FORMS: MY PORTFOLIOS

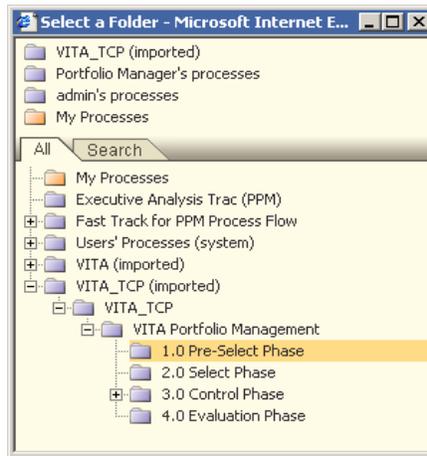
The other method of selecting a form is to use ‘My Portfolios.’ The ‘My Portfolios’ feature of ProSight Portfolios allows the user to create step-by-step procedures. In the CTP, **ITIM Pre-Select and Select, Control, Evaluation and Phases** are the processes that you will use to manage the IT investments as portfolios.

To open the *My Portfolios* frame, click on the double arrow ‘>>’ at the far left at the top of the ProSight Portfolios screen as shown in below (close the frame by clicking on the double arrow ‘<<’): The back and forward buttons at the top of the frame will change the view of the frame to the previous frames you have navigated.



The workflows are displayed as process links with descriptions, in user defined folders in a new left bar available in any of the Portfolios modules. Once the *My Portfolios* frame is open, you can select from the drop-down menu to open the various processes as shown below:

# ProSight Orientation and Navigation



The text of the processes appears with any associated links or documents to assist you within that respective module.

The screenshot shows the ProSight Portfolios application interface. The left sidebar displays the '1.0 Pre-Select Phase' selected. The main content area shows the 'Project Closeout Report' form, with tabs for 'GENERAL INFORMATION', 'EXPENDITURES AND PERFORM...', 'WBS', 'SCOPE', 'O & M', and 'PROJECT RESOURCES'. The 'Deliverables' section includes a table with columns for 'Deliverable Name', 'Date Accepted', and 'Contingencies or Conditions'.

Deliverable Name	Date Accepted	Contingencies or Conditions

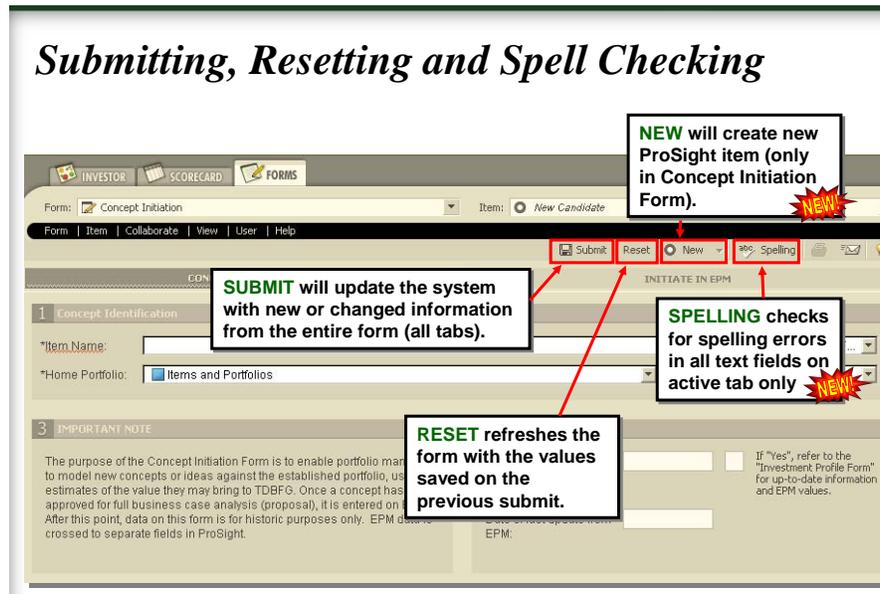
## ProSight Orientation and Navigation

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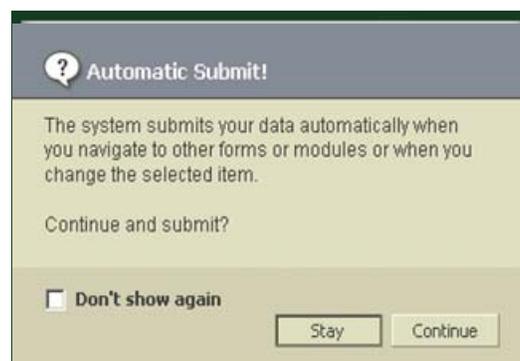
**NOTE:** In My Portfolios, multiple links to the same form may exist, but the links will go to different tabs based on the form selection.

### SUBMITTING, RESETTING AND SPELL CHECKING FORMS

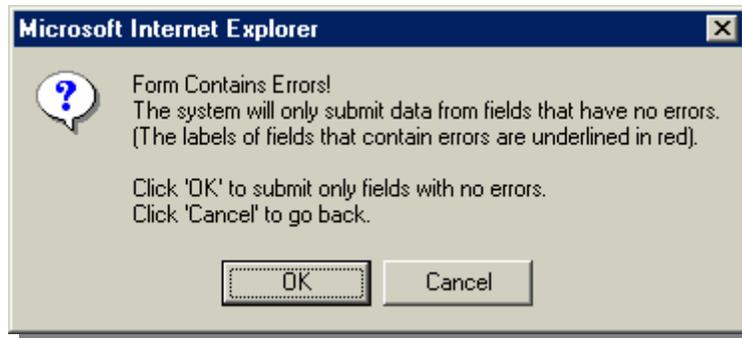
Submitting a Form: To submit or save a form, click on the *Submit* tab



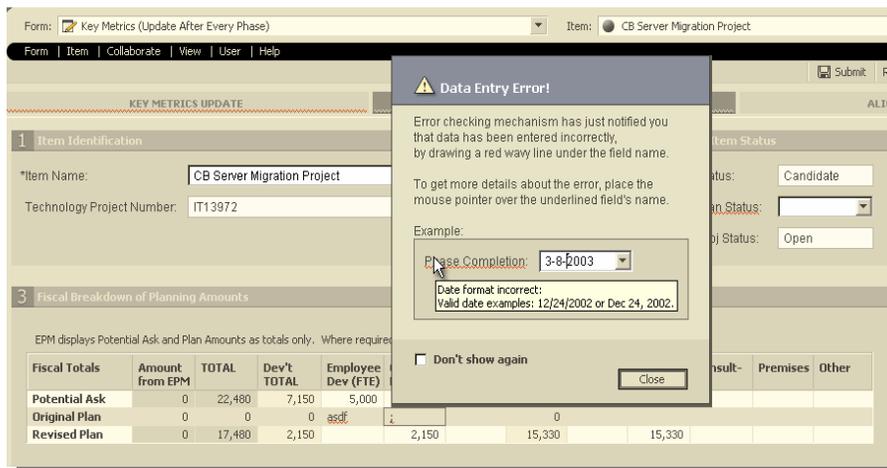
- The “**Automatic Submit!**” window will appear when you attempt to navigate away from a form in which data has been changed without submitting.
- “**STAY**” returns you to the form you were in so you can review your edits and manually submit or reset.
- “**CONTINUE**” will automatically submit any data you have changed or entered and you will navigate to the new form or module you requested.



- The **“Form Contains Errors!”** window will appear when a form is submitted with mandatory data missing.
- **“OK”** submits the form with the missing data.
- **“CANCEL”** returns you to the form to update the mandatory data before submitting.



The **“Data Entry Error!”** window will appear when an incorrect data type is entered into a field. This error message does NOT define the error you have made – it is an error indication. The example shown is incorrect date format; another example might be a non-numeric character in an integer field.



The following indications are used to highlight errors or missing data.

# ProSight Orientation and Navigation

**TABS with errors are underlined with red squiggly lines**

**Mandatory fields missing data are underlined**

**Error indication lines identify FIELDS with an incorrect data type**

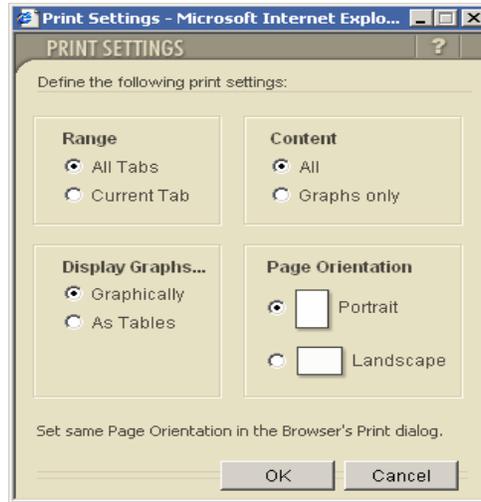
Fiscal Totals	Amount from EPM	TOTAL	Dev't TOTAL	Employee Dev (FTE)	Contract Dev	Outtask Dev	Non-Dev't TOTAL	Hardware	Software	Consulting	Premises	Other
Potential Ask	0	22,480	7,150	5,000	2,150		15,330		15,330			
Original Plan	0	0	0	0	0		0					
Revised Plan									15,330			

**Printing a Form:** Select Print from the drop down menu

**Form prints to HTML format**

	% New Plan	Total Only Fiscal Plan
<b>NETAL</b>	73	31,683,976
<b>Discretionary</b>	44	21,729,308
Technology Initiatives	33	20,475,308
Small Enhancements	16	260,000
Studies	17	824,000
<b>Mandatory</b>	8	9,911,812
Technology Initiatives	4	8,378,292
Support the Base	4	1,538,520
<b>Funding Class</b>		
Priority	19	1,040
Enhancement Apps	10	7,863,038
LMR Apps	23	9,113,970
Infrastructure	17	13,952,072

**Select the Print Settings:**



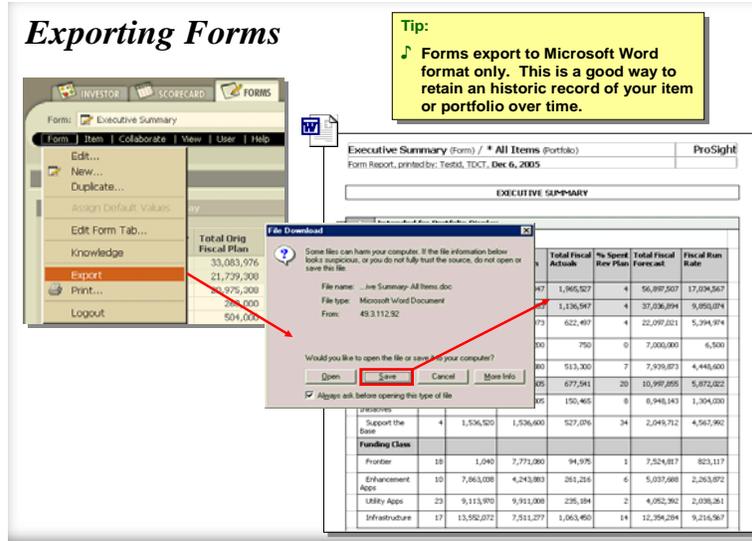
## The word document appears:

Procurement Business Alignment (Form) / 129 DHRM Procurements (O&M) (Portfolio) ProSight

Form Report, printed by: Cummings, Edna, Aug 7, 2006

PROCUREMENT ALIGNMENT	
<b>General</b>	
Title:	129 DHRM Procurements (O&M)
Home Portfolio:	129 Department of Human Resources Management (DHRM)
Description:	TEST
Item Type (Procurement):	
Proponent Secretary:	
Proponent Agency:	
Procurement Infrastructure Type:	
Item Classification:	
Planned Start Date:	
Planned Completion Date:	
Procurement Cost:	
Appropriation Act/Funding Status:	
<b>SERVICE AREAS</b>	
Align Investment to Service Areas	

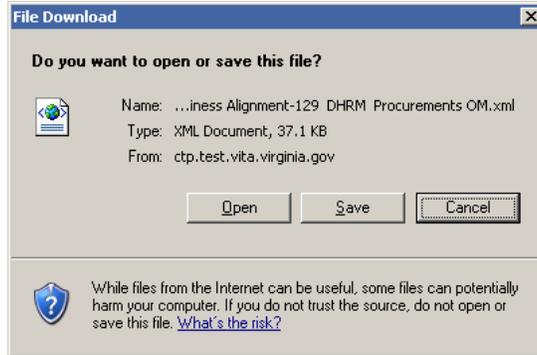
To produce reports, retain a historic record, or provide information outside of ProSight Portfolios, use the **EXPORT** feature.



Select the Settings:



Select Open or Save:



The file appears as a word document.

Procurement Business Alignment (Form) / 129 DHRM Procurements (O&M) ProSight  
(Portfolio)  
Form Report, printed by: Cummings, Edna, Aug 7, 2006

PROCUREMENT ALIGNMENT	
<b>General</b>	
Title:	129 DHRM Procurements (O&M)
Home Portfolio:	129 Department of Human Resources Management (DHRM)
Description:	TEST
Item Type (Procurement):	
Proposer Secretary:	
Proposer Agency:	
Procurement Infrastructure Type:	
Item Classification:	
Planned Start Date:	
Planned Completion Date:	
Procurement Cost:	
Appropriation Act/Funding Status:	

## RECORDING DEPENDENCIES

Dependencies allow users to record the relationships between portfolios. Below is an example of a form with a dependencies component. Dependency analytics are also supported in the Workbook module. NOTE: Dependencies features are selected when a form is created.

Form: Project Business Alignment - V1 Item: 166 SOC Projects

Form | Item | Collaborate | View | User | Setup | Help

Submit | Reset | Spelling

GENERAL INFORMATION | BUS. PROBLEM / OUTCOME | ALIGNMENT TO GOALS | **SERVICE AREAS** | EXTERNAL FACTORS | COLLABORATION

Align Investment to Service Areas

Select Service Areas this investment supports by clicking on the "Add" button (below right). After the Service Areas have been added, indicate the Primary Service Area by double clicking on the cell in the "Weight" column. Describe how the investment supports the Service Area by clicking on the Service Area name and then press the "Edit" button; enter the description in the "Annotation" box.

Service Areas Supported Direction: Supports, Type: Service Area

Dependency Properties		Item Properties					
Item Name	Weight	Cost	Manager	Start Date	End Date	Phase	
							Add...
							Edit...
							Remove

### Exercises – Working with Forms

#### 1. Select a Form from Forms Module:

Make sure you are in the Forms Module (click on the “Forms” Module to go to the Forms Module)

##### a. Select a Form using the Form drop-down menu of the Forms Module’s Title Bar

Note: Click on the ‘+’ to expand various folders until you find the form you desire.  
Highlight/Click on the form. (If you have permission to view that form, the form will open and display the data from the item you may have selected)

##### b. Select the Item from the Item drop-down menu

Note: Click on the ‘+’ to expand various folders until you drill down to the Item you desire.

Highlight/Click on the Item (You will be able to select only item that you have permissions to, all others will be grayed out)

Note: You can also use the search function of the drop-down to do a Item Name Search and find a Item.

Use Search function and access the “Project Charter” Form – Search for “Project Charter”

#### 2. Update Form Data and Save / Submit a Form:

Access a form – (Example – Investment Business Case Form)

Enter Data in some of the form fields

Click on the Submit button to save the data.

Verify if data is saved

#### 3. Using the same form, select and view data from a different project/item:

For the Investment Business Case Form, change the Item and view the data from a different project by selecting a different project from the *Item* drop-down menu

Note: You can also use the search function of the drop-down to search by Project Name

Use Search function and access the “Records Management” Project – Search for “Records Management”

## Section 3 Scorecards

Scorecards are a customized view of selected categories for a given Portfolio and serves as a core management tool. Using the table format, **Scorecards** provide a comprehensive overview of an organization’s performance and items based on pre-defined criteria. Scorecards are versatile and dynamic and also provide simultaneous qualitative, quantitative, subjective, and date-driven indicators and values. One view allows you to simultaneously analyze Items and compare Categories. This quick review allows you to quickly assess areas of interest or potential concern. Scorecards streamline updating category and values of more than one Item.

**What is a Scorecard?**

★ Scorecards display data in a tabular format, similar to a spreadsheet

🎵 **Tip: Both a scorecard and a portfolio must be selected in order to view any data.**

Headers display category names or labels.

Portfolios	\$ Rev Fiscal Plan Total	% Plan Good	% Plan Moderate	% Plan Poor	% Plan No Value	# Good	# Mod	# Poor	# No Value	\$ Plan Good	\$ Plan Moderate	\$ Plan Poor	\$ Plan No Value
* Portfolio of Portfolios	51,163,977	84	7	9	0	122	16	9	37	42,844,753	3,814,512	4,504,712	0
1 bonds - demo TWE	7,204,348	80	13	7	0	23	3	2	0	5,759,063	959,910	485,375	0
2 bonds - demo TWEs	3,301,375	100	0	0	0	20	0	1	0	3,291,000	0	10,375	0
3 bonds - manual EPM	3,778,000	100	0	0	0	2	0	0	4	3,778,000	0	0	0
4 bonds - phases pre-	36,880,254	81	8	11	0	77	13	6	33	30,016,690	2,854,602	4,008,962	0

Rows display item values.

**Right mouse button:** Allows for a windows type utility and accesses objects and menus.

Portfolios	Health	Overall Schedule Health	Current Phase Schedule Health	Percent Complete
VITA Demo	Green	★ Missing Dates	◇ No Current Phase	— — —
1 Christopher Newp...	Green	★ Missing Dates	◇ No Current Phase	— — —
2 PCM Test High	Green	★ Missing Dates	◇ No Current Phase	— — —
3 PCM Test Low	Green	★ Missing Dates	◇ No Current Phase	— — —
4 PCM Test Medium	Green	★ Missing Dates	◇ No Current Phase	— — —
5 test 2	Green	★ Missing Dates	◇ No Current Phase	— — —
6 test 5	Green	★ Missing Dates	◇ No Current Phase	— — —
7 Virginia Election a...	Green	★ Missing Dates	◇ No Current Phase	— — —
8 VITA_TCP_Item	Green	★ Missing Dates	◇ No Current Phase	— — —
9 zkgzozjtest	Green	★ Missing Dates	◇ No Current Phase	— — —
10 ZZZZ BRAND NEW ...	Green	★ Missing Dates	◇ No Current Phase	— — —
11 ZZZZZZZZZZZZZZZ...	Green	★ Missing Dates	◇ No Current Phase	— — —

Override Indicator...  
 Call Request...  
 Dashboard  
 Trend...  
 Cell Properties...

Items	Health	Overall Schedule Health	Current Phase	Schedule Health	Percent Complete
Active Projects -	Green	★ Missing Dates	◇ No Current F		
1 .NET Framework	Green	★ Missing Dates	◇ No Current F		
2 129 test 0	Green	★ Missing Dates	◇ No Current F		
3 129 test 1	Green	★ Missing Dates	◇ No Current F		
4 129 test 2	Green	★ Missing Dates	◇ No Current F		
5 129 test 4	Green	★ Missing Dates	◇ No Current F		
6 Accounting Data...	Green	★ Missing Dates	◇ No Current F		
7 Accounts Payabl...	Green	★ Missing Dates	◇ No Current F		
8 Accounts Receiv...	Green	★ Missing Dates	◇ No Current F		
9 Administrative C...	Green	★ Missing Dates	◇ No Current Phase		
10 Administrative H...	Green	★ Missing Dates	◇ No Current Phase		

The context menu is open over the 'Current Phase' column, showing options: Show Values, Show Indicators, Show Both, Sort Ascending, Sort Descending, Hide Category, Knowledge, Category Trend..., and Category Properties...

The **Title** and **Menu** bars function as they do in other ProSight Portfolios modules.

The **Tool bar** consists of the following buttons:

- **Navigation:** navigate between the browser screens. Use the *'tab'* key to navigate between cells
- **Print:** print the current scorecard
- **Mail:** e-mail a link to the current scorecard
- **Knowledge:** access the scorecard knowledge portal

Each scorecard has a list of cross referenced categories to a portfolio. Some examples of these categories are:

- **Health:** indicator of the general performance of the Item, color and graphic codes are used.
- **Life Cycle:** phases of Item
- **Budget:** Indicates the actual or projected funding for an Item
- **Summary Row:** summary values for the category column for the combined items in the portfolio. The summary format can be defined for each category and can be depicted as an average, total or any other defined user method
- **Indicators:** current status of a category depicted by color and shape coded symbols. Indicator tabs can be updated
- **Values:** the actual vale status for each item or portfolio. Value tabs can be updated

**Displaying Portfolios and Scorecards:** To display a scorecard, select a portfolio from the navigation tree. In the scorecard field, click a scorecard from the navigation tree.

**Resizing columns:** Move the cursor to the column divider to the right of the required column until the cursor becomes a double-headed arrow. Click and drag the column divider to the desired size.

**Hiding and Showing Columns:** Click the title of the column to be hidden with the Right Mouse button and select hide column from the displayed popup menu. To display the column, select *View, Unhide* all columns.

**Sorting columns:** Right click category title you wish to sort. A pop-up menu appears. Select Sort Ascending or Sort Descending.

**Changing the sort order:** Click the header of the items column. A pop-up menu appears. Select Sort Status Ascending or Sort Status Descending.

## SCORECARD CELLS

Scorecard cells are the convergence point of each row that displays the value for a specific item. Clicking a scorecard cell displays a pop-up menu that provides options for edition for viewing information connected to the cell contents.

Data cells are the cells within the scorecard. Summary Cells are the top cells in each column and contain a summary of the information in that column. To display a popup menu, 'right click' the cell. The following options are on the popup menu:

**Dashboard:** Drills down to the dashboard for the cell

**Trend:** Displays the Trend tab of the Cell Properties window to view the cell history (i.e., graph, value, indicator and update information). The **Trend** tab of the Cell Properties window displays the values entered in the cell over a period of time as a graph. The graph will display:

**Today line:** Current values

**Future line:** The future line includes future values.

**Reference values:** Displays several lines, one for each category

**Cell properties:** Displays the cell properties window to view information about the cell (i.e., indicators, values and update methods, etc.) The Cell Properties window opens to the last viewed tab in the window.

**Update:** Enables users to perform the cell update. Direct update is a feature that allows you to update the value or indicator of a cell by entering a value or selecting from a drop down menu. To update a cell:

Right click the cell and choose **Update** from the drop-down menu. If the value is numeric or text string, the cell clears. If the value is not numeric or a text string, an arrow appears on the right. In the example below, a drop down menu appears for you to update the cell.

8	Accounts Receiv...	--	--	--	Major	Project	--
9	Administrative C...	--	--	--	Non-Major	Project	--
10	Administrative H...	--	--	--	Non-Major	Project	Update
11	Adverse Experien...	--	Motor Vehicle Dealer Board	--	Non-Major	Project	Cell Request...
12	ALICE	--	--	--	Non-Major	Project	Dashboard
13	Jim Project	--	--	--	Major	Project	Trend...
14	jim test	The Commonwealth	Department of Employment Di...	ijffff	Major	Project	Cell Properties...
15	Jim's Project	--	Commonwealth Competition C...	working title	--	Project	et it go
16	JVanhorn - Test P...	Finance	--	Update Implementation of th...	Major	Project	--
17	PM Project 2	Technology	Virginia Information Technolo...	Project 2	Major	Project	--
18	PM Project 2	Technology	Virginia Information Technolo...	Project 2	Major	Project	--

Major
Major
Non-Major
Major
Non-Major
No Value
Major
Major

### **Exercises- Working with Scorecards:**

#### **1. Select a Scorecard from Scorecard Module:**

- a. Click on the Scorecard Module Tab – to go to the scorecard module
- b. Click on the Scorecard drop-down – on the title bar
  - i. Drill down and select the scorecard you want to access (Scorecards are arranged in the alphabetical order)
  - ii. Example – “Report #43 / #44 Funding Status / Not Funded”
- c. Click on the Item/Portfolio drop-down – on the title bar
  - i. Drill down and select an appropriate portfolio
  - ii. Example – “136 VITA Projects”

#### **2. Update Scorecard Data (funding Status) and Save / Submit the data**

- a. Continue with the above scorecard
- b. Select an investment/project
- c. Double click on the “Approp Act / Funding Status Field” for that project
- d. Change the Funding Status value
- e. Click to submit and save the change
- f. Data can be updated this way and changes will be reflected in other forms, scorecards, etc.,

#### **3. Select and View Scorecard Data from a different Portfolio**

- a. Continue with the above scorecard - “Report #43 / #44 Funding Status / Not Funded”
- b. Select an different portfolio to view its data
- c. Click on the Item/Portfolio drop-down – on the title bar
  - i. Drill down and select an appropriate portfolio
  - ii. Example – “440 DEQ Projects”
- d. Scorecard will display data for 440 DEQ Projects

### Section 4 Workbooks

*Workbooks* provide a detailed view of business operations at the item or portfolio level. This information includes who is responsible for actions, phase deliverables, phase completion status, contact information and hints related to the viewed item. Workbooks also provide scheduling information to track events and updates, information regarding out-of-date data and the ability to view updates in the user's area of interest.

Team leaders and project managers can use *Workbooks* to track activities for individual areas of responsibility and to assess the progress of items. Portfolio managers can use portfolio workbooks to track activities and deliverables that are portfolio-wide and are not connected with a specific item.

#### SCORECARDS AND WORKBOOKS

In *Workbooks*, the current item is rated according to selected scorecards. Workbooks provide the CTP management the capability of viewing a single item or portfolio for the project manager and others on the team.

The top part of the *Workbook* displays the row of a Scorecard for that item or portfolio. To display an item, select at the top of the Workbook screen the Scorecard that you want to display and the item.

#### Selecting a Scorecard

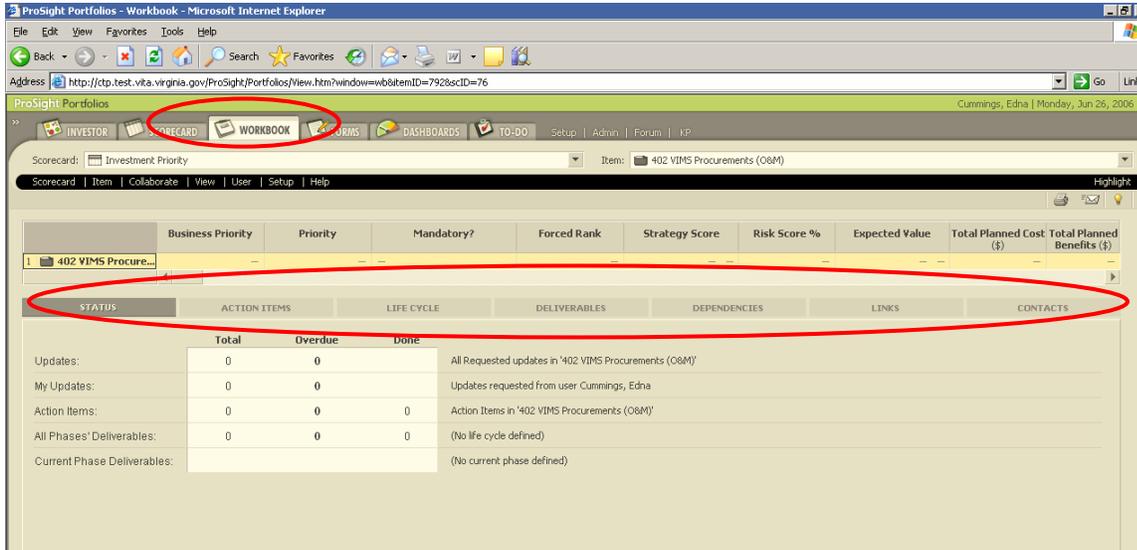
To select the item and scorecard for the item workbook:

In the item field in the title bar, from the drop down list select the item to be viewed.

The bottom part of the Workbook displays seven tabs that you can select to show different types of information for the item:

- Status
- Life Cycle
- Dependencies
- Contacts
- Action Items
- Deliverables
- Links

# ProSight Orientation and Navigation

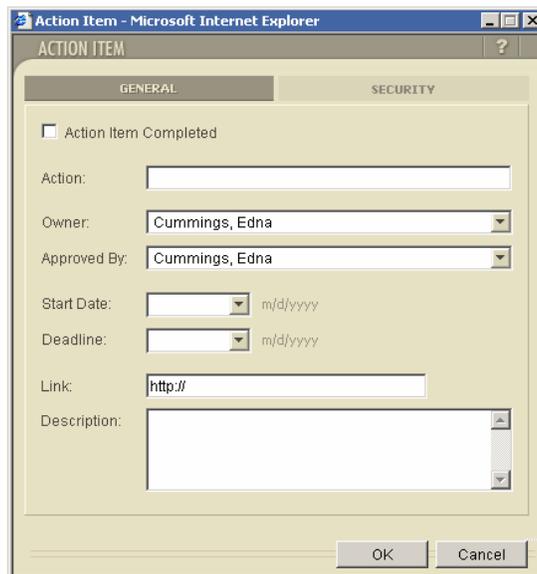
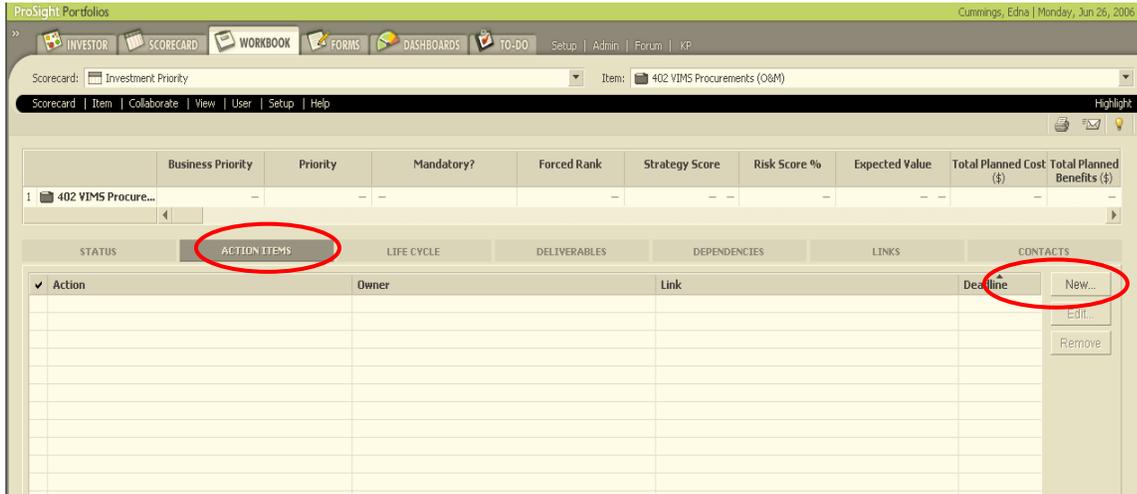


**STATUS:** Provides an overview of the Portfolio or Item (Updates, Actions, deliverables, etc).



## ACTION ITEMS

In the *Action Items* tab, click **New**. The General tab of the *New Action Item* window is displayed:



Enter action item information as required in the fields:

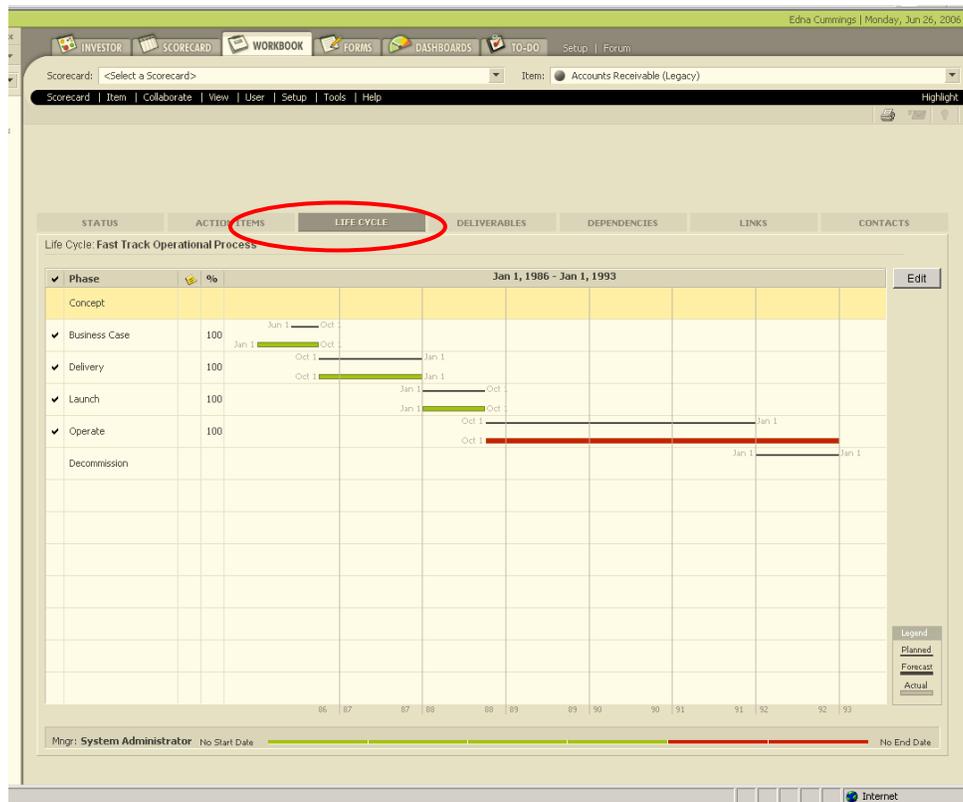
- **Action:** Descriptive name for the action item
- **Owner:** From the drop-down list, select the ProSight Portfolio user responsible for the action item.
- **Approved By:** From the drop-down list, select the ProSight Portfolios user who approves the completion of the action item

- **Start Date:** Enter the start date for the action item in the format mm/dd/yy, or select a start date from the drop-down calendar.
- **Deadline:** Enter the completion date
- **Link:** Enter the address of a website related to the action item or a locating within the ProSight Portfolios system.
- **Description:** Enter a brief description of the action items; Hypertext can be included in the description.

To set or view the action item's security permissions, click **Security**. The Security tab or the New Action Item window is displayed. Click **OK**. The Action Items tab is refreshed, and the new action item is displayed.

### LIFE CYCLES

To use the *Workbook*, users must establish Life Cycles. The Life Cycle tab displays detailed information about the item's phases. When a new item is established, the user has an option of assigning a Life Cycle by selecting one from an existing list. If a *Life Cycle* has not been assigned at the time the Item was created, it can be assigned in the workbook or through editing the item in *Setup*.

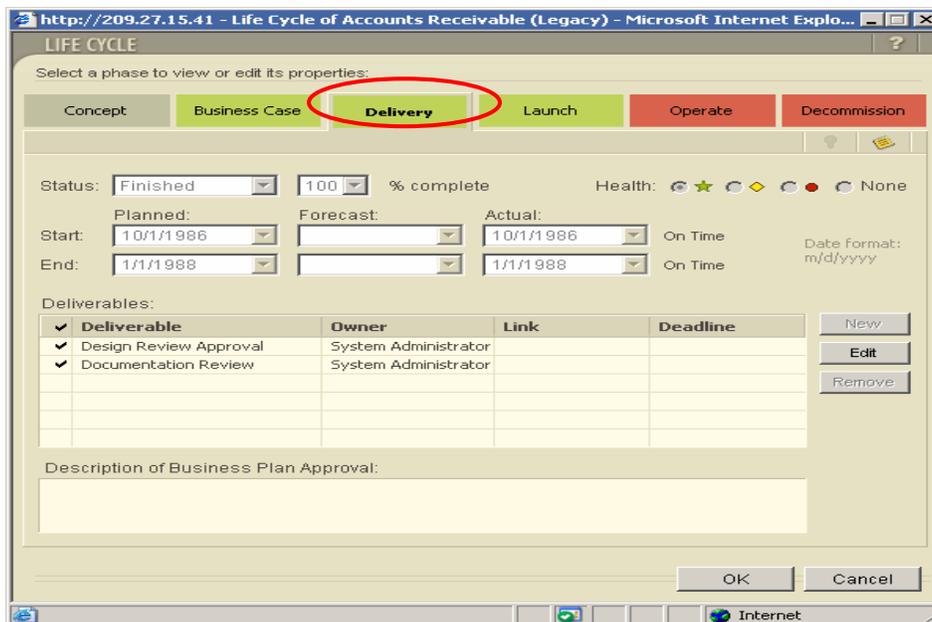


### Components of the Life Cycle tab:

- **Completed Column:** A checkmark indicates that the phase is completed. A right-pointing arrow indicates the item's current phase. Click to add or remove a checkmark.
- **Phase Column:** Displays the name of a phase
- **Annotation Column:** A mark in this column indicates that the phase has some annotations which are entered in the *Life Cycle* window. Annotations are explanatory notes or comments about the phase. Click here to open the Annotation window for the phase.
- **Percentage Column:** Displays the completion percentage of the phase
- **Progress Bars:** Displays the actual progress of the phase in comparison to Planned and Forecasted phase progress. The 'Planned' is depicted by a thin black bar followed by 'Forecasted' illustrated by a thick black bar. 'Actual' progress is colored to indicate the phase health.
- **Edit Button:** Click to open the Life Cycle window for the phase.
- **Item Information Area:** Displays the item manager, start date, end date and phases.

### Accessing the Life Cycle Window

Double-click the row of the phase to be edited or select a phase and then click **Edit**. The *Life Cycle* window is displayed with the selected phase. In the example below, the delivery phase is selected.



The screenshot shows a web browser window titled "LIFE CYCLE" with the URL "http://209.27.15.41 - Life Cycle of Accounts Receivable (Legacy) - Microsoft Internet Explo...". The main content area has a header "Select a phase to view or edit its properties:" followed by a row of phase buttons: "Concept", "Business Case", "Delivery" (highlighted with a red circle), "Launch", "Operate", and "Decommission". Below this, there are several input fields and dropdown menus for "Status" (set to "Finished"), "% complete" (set to "100"), "Health" (with icons for star, diamond, circle, and None), "Planned" (date: "10/1/1986"), "Forecast" (empty), "Actual" (date: "10/1/1986"), "Start" (date: "10/1/1986"), "End" (date: "1/1/1988"), and "On Time" indicators. A "Deliverables" table is shown with columns for "Deliverable", "Owner", "Link", and "Deadline". The table contains two rows: "Design Review Approval" and "Documentation Review", both owned by "System Administrator". To the right of the table are "New", "Edit", and "Remove" buttons. Below the table is a text area for "Description of Business Plan Approval:". At the bottom of the window are "OK" and "Cancel" buttons.

Deliverable	Owner	Link	Deadline
Design Review Approval	System Administrator		
Documentation Review	System Administrator		

Each tab or the *Life Cycle* window represents a single phase of the life cycle. Users can access each phase by clicking the relevant tab. Once the phase is accessed; it can be viewed, edited or annotated as required to include information about deliverables.

### Editing information in Life Cycle:

- **Status:** From the drop-down list, select the status of the phase. A phase can be **Not Started, Current Phase, Finished** or **Skipped**.
- **% complete:** Indicates the percentage of the phase that has been completed.
- **Health:** Select an indicator to represent health
- **Start date:** Enter in mm/dd/yyyy format or select from drop-down calendar. To the right of the Start field is an indicator of how early or late the actual start date compares to the planned start date
- **End:** Enter in mm/dd/yyyy format or select from drop-down calendar. To the right of the End date field is an indicator of how early or late the actual start date compares to the planned start date
- **Deliverables:** Displays the deliverables of the phase
- **Annotation:** Click to write annotations
- **New:** Click to access the New Deliverable window
- **Edit:** Select a deliverable in the table and click Edit to access the Edit Deliverable window.
- **Remove:** Select a deliverable in the table and click remove to delete the deliverable from the phase
- **Description:** enter a description of the selected deliverable

The screenshot shows a web browser window titled "http://209.27.15.41 - Life Cycle of Accounts Receivable (Legacy) - Microsoft Internet Explo...". The application interface is titled "LIFE CYCLE" and includes a navigation bar with tabs for "Concept", "Business Case", "Delivery", "Launch", "Operate", and "Decommission". The "Delivery" tab is currently selected. Below the navigation bar, there are several input fields and controls:

- Status:** A dropdown menu set to "Finished".
- % complete:** A dropdown menu set to "100".
- Health:** A set of icons representing different health states, with a green star icon selected.
- Start:** Three dropdown menus for "Planned:", "Forecast:", and "Actual:" dates, all set to "10/1/1986". To the right of the "Actual:" date is an "On Time" indicator.
- End:** Three dropdown menus for "Planned:", "Forecast:", and "Actual:" dates, all set to "1/1/1988". To the right of the "Actual:" date is an "On Time" indicator.
- Date format:** A label "Date format: m/d/yyyy".

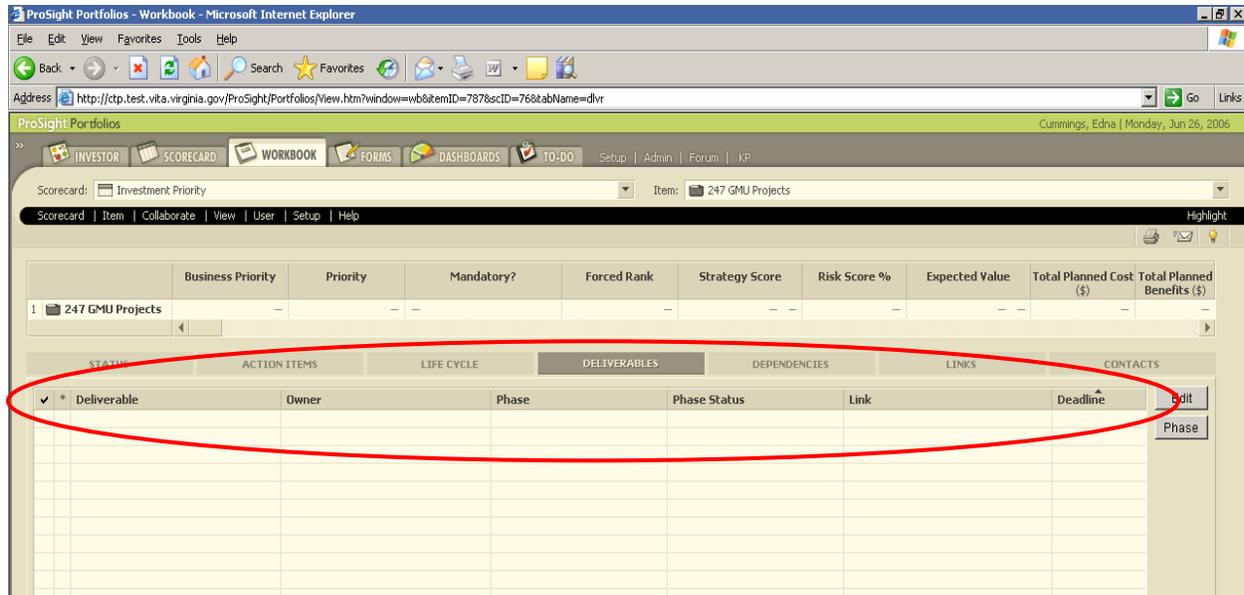
Below these fields is a table titled "Deliverables:" with the following columns: "Deliverable", "Owner", "Link", and "Deadline". The table contains two rows of data:

Deliverable	Owner	Link	Deadline
✓ Design Review Approval	System Administrator		
✓ Documentation Review	System Administrator		

To the right of the table are three buttons: "New", "Edit", and "Remove". Below the table is a text area labeled "Description of Business Plan Approval:". At the bottom of the form are "OK" and "Cancel" buttons.

## DELIVERABLES

The deliverables tab displays detailed information about the deliverables for the phases of the item.



### Deliverables Tab Components

- **Completed column:** A checkmark indicates the deliverable is completed
- **Mandatory column:** An asterisk indicates the deliverable is mandatory
- **Deliverable column:** Deliverable name
- **Owner column:** Displays the name of the ProSight Portfolios user responsible for the deliverable
- **Phase column:** Displays the name of the phase
- **Phase Status column:** Indicates the status of the phase such as started or finished
- **Link column:** Displays the link assigned to the deliverable
- **Deadline column:** Displays the scheduled completion date
- **Edit button:** Click to edit a deliverable
- **Phase button:** Click to display the *Life Cycle* window
- **Description area:** Displays a description of the selected deliverable
- **Item Information:** Displays the item manager, start date, end date and phases

### Accessing the Edit Deliverable window from the Deliverables tab

Double click the row of the deliverable to be edited or select a deliverable and then click **Edit**. Edit information as required in the following areas of the *Edit Deliverable* window:

- **Deliverable Completed:** Place a checkmark in the box to indicate that the deliverable has been completed.
- **Name:** Enter a name for the deliverable
- **Phase:** Indicates the phase that the deliverable belongs to
- **Owner:** From the drop-down list, select the name of the ProSight Portfolios user responsible for the deliverable.
- **Deadline:** Enter the date the deliverable is to be completed in the dd/mm/yyyy format or select a date from the drop down menu
- **Link:** enter the web address of a web site related to the deliverable or a location within in the ProSight Portfolios system. The text entered in this field will be displayed as Hypertext.
- **Upload:** Click to upload a new document to the ProSight Portfolios Server and link to it. The *Upload Document* window is displayed.
- **Document:** Click to link to a document on the ProSight Portfolios Server. The *Documents* window is displayed and a list of uploaded documents appears in the *Documents* window. Select a document from the list and click **OK**. The document's link is entered in the *Link* field.
- **Browse:** Click to browse a document in the network and the Choose file dialog box is displayed. Select a document and click **Open**. The document's link is entered in the *Link* field.
- **Description:** Enter a brief description of the deliverable including Hypertext if applicable.
- **Mandatory:** Select the Mandatory checkbox to make the deliverable mandatory to the completion phase.

**Security Permissions:** To access the security permissions of a deliverable, click **Security** in the *Edit Deliverable* window. The *Security* tab is displayed.

### WORKING WITH DEPENDENCIES

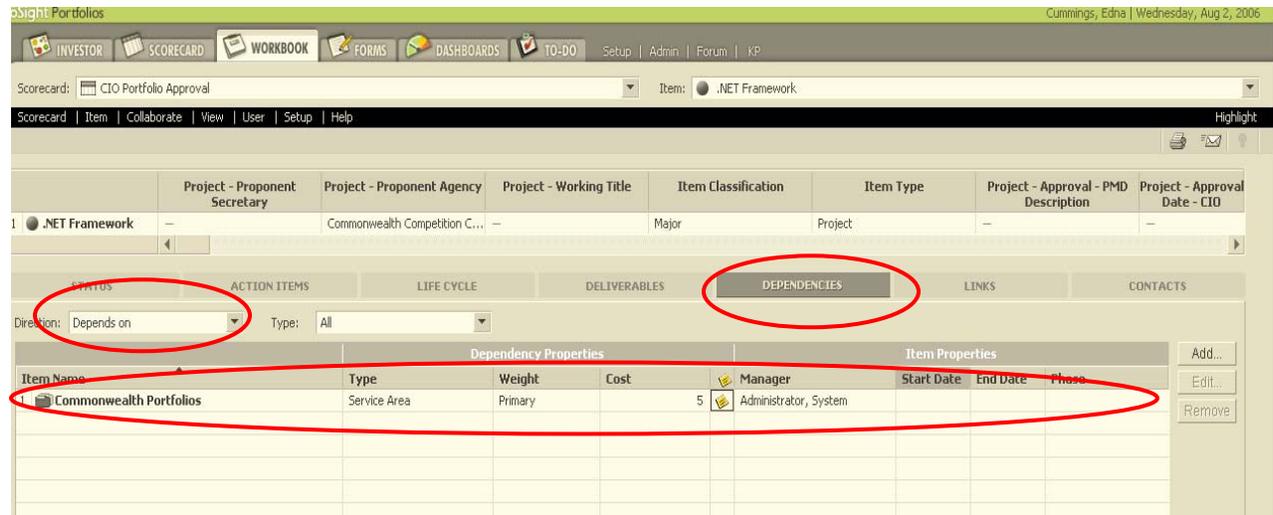
Users define dependencies, normally at the item level. To manage and analyze dependencies; users can view a list of dependent *items/portfolios* in the workbook. Users can drill down to the Dependencies List from the Scorecard or Investor Map.

The Dependencies List contains either items/portfolios which the item depends on or supports. The *Item Depends on* list is the reverse of the *Item Supports* list. *For example, if item X depends on Y, then item Y supports item X.* The reverse list is automatically updated when a dependency list is updated.

## ProSight Orientation and Navigation

If users have Edit permissions on the item, then they can add and remove items/portfolios directly from the list. An annotation box provides details of the dependent relationship. Additionally, several basic system categories provide information about the Dependency properties (weight, cost) and Dependent item properties (manager, start date, end date, phase) the *Dependencies* tab display the list containing information about the dependencies.

The dependencies list can be sorted by clicking the column heading. The components of the Dependencies tab are:



**Dependency Direction Type**-Choose one of the following lists to display:

**Item Depends on:** The items/portfolios that the current item depends on. This is the default list

**Item Supports:** The items/portfolios that depend on the current item.

- **Name:** Displays a numbered list of items/portfolios
- **Manager:** name of the manager responsible for the item/portfolio
- **Start Date:** Item/portfolio start date
- **End Date column:** Item/portfolio end date
- **Phase:** Item/portfolio's current phase
- **Add button:** Click to add a dependency. The Select an Item navigation tree is displayed. Select an item/portfolio from the list of recently viewed items/portfolios at the top of the navigation tree. The selected item/portfolio is appended to the list.
- **Edit button:** Click to edit the highlighted dependency. The Dependency Properties window is displayed.
- **Remove button:** Click to remove the highlighted dependency.

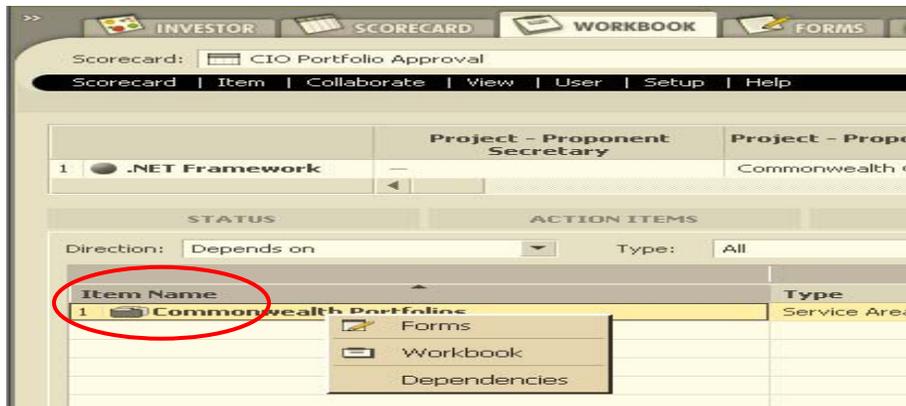
**Restrictions for adding items as dependencies:**

- An item cannot depend on an item if it already supports that item

- An item cannot be in a dependency relationship with a portfolio that contains it
- A pair of items cannot be in a dependency relationship if one of the items has an existing dependency relationship with the other item

**Annotation area:** Display a description of the relationship of the selected item/portfolio. This description is also displayed in the reverse list. This is only editable in the *Dependencies* tab.

### ACCESSING THE ITEM MENU



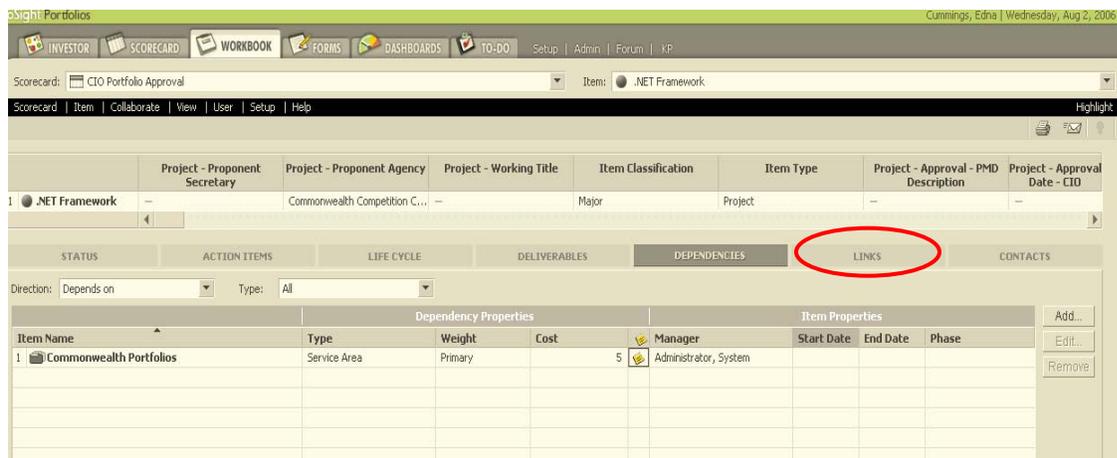
The item popup menu (right click) allows users to select from the following options:

- **Workbook:** Select **Workbook** to access the management workbook for the selected item/portfolio
- **Forms:** Select **Forms** to access the form for the selected item/portfolio
- **Dependencies:** Select **Dependencies** to access the Dependencies list for the selected item/portfolio. The drill down can be either the Workbook or Forms depending on user system settings. The Workbook is the default drill down. The default drill down can be changed to access a specific form tab.

### WORKING WITH LINKS

Users can access documents uploaded to the ProSight Portfolios Server by using a URL (web link). A document link can be used any place that supports links within the system (text fields, annotations, link lists, deliverables, etc.). This capability allows the Commonwealth to overcome existing network/firewall limitation that prevent dispersed users and agencies from sharing documents

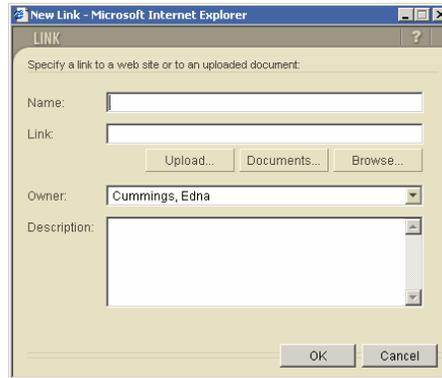
Below are the components of the **Links** tab:



- **Name column:** Displays the name of the link
- **Link column:** Displays the URL of the link
- **Size column:** Displays the size of the document
- **Owner column:** Displays the user responsible for the link
- **Uploaded column:** Displays the date the document was uploaded
- **Description area:** Displays a description of the link
- **New button:** Access the *Link* window to add a new link to the Links list.
- **Edit button:** Access the *Edit Link* window to edit the selected link
- **Remove button:** Removes the selected uploaded document link from the list. Only the link is removed; the document is not removed from the system.
- **Item information area:** Displays the item manager, start date, end date and phases.

## CREATING A NEW LINK

In the *Links* tab, click **New**. The *Link* window is displayed.



Enter **Link** information in the following fields:

- **Name:** Enter a name for the new link. If you use the **Upload, Documents or Browse** button, then the name is automatically entered.
- **Link:** Enter the URL or web address of the new the link. Users can enter the URL of a web site or a location within the ProSight Portfolios system. The text entered in this field will be display as Hypertext.
- **Upload button:** Click to upload a new document to the ProSight Portfolios Server and link. The *Upload Document* window is displayed and a link is placed in the Links list when the upload is complete.
- **Documents button:** Click to link to a document on the Prosight Portfolios Server. The Documents window is displayed with a list of uploaded documents. Select a document from the list and click **OK**. The document's name and link are automatically entered in the Link window.
- **Browse button:** Click to brows a document in the network. The choose File dialog box is displayed. Select a document and click Open. The document's name and link are entered in the Link window.
- **Owner:** From the drop-down list, select the ProSight Portfolios user responsible from the link.
- **Description:** Enter a brief description of the link, including any hypertext.

**Editing a Link:** To edit a link, open the link and edit the selected text and click **OK**.

**Removing a Link:** For uploaded documents, only the link to the document can be removed and not the actual document.

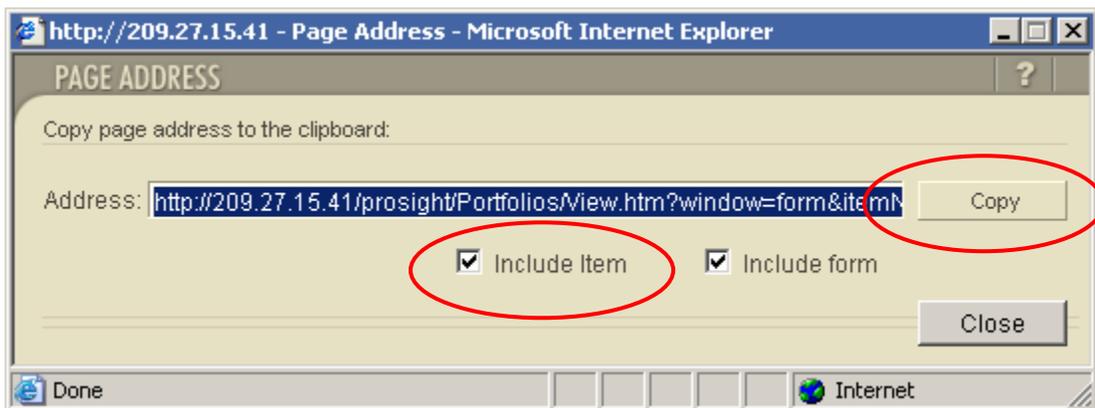
**Uploading a Document:** In the *Links* tab, click **Upload** and the Upload Document window is displayed. Click **Browse** and select the document from the file list. Click **OK**.

**Obtaining a ProSight Portfolios Link:** In ProSight Portfolios, a link that is entered into a cell or field can be the URL of a website outside of Portfolios or of a location within the Portfolios

system. For example, an action item in the Workbook module can contain a link to a specific form in the ProSight Portfolios system.

**Obtaining a link within the ProSight Portfolios system:** From the **Collaborate** menu on the **Menu Bar**, select **Obtain Page Address**. The *Page Address* window appears. Uncheck the **Included Item** box to reference workbook details of the item previously selected in the workbook or the item set a default in the User Wizard.

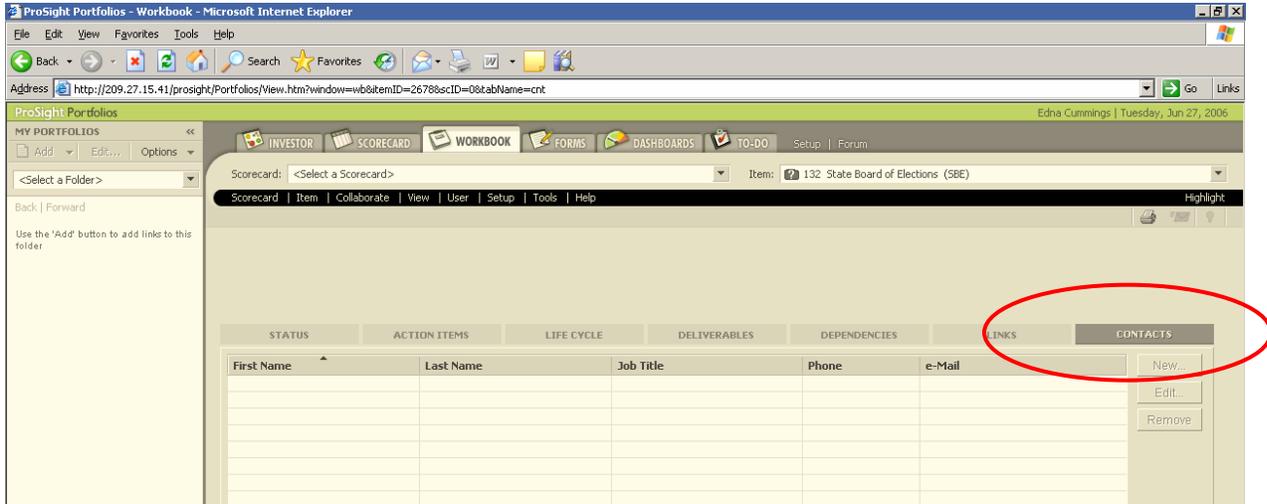
Click **Copy** to obtain the page address. You can now paste the URL into any application.



## WORKING WITH CONTACTS

In the Contacts tab, click **New**. The *Add Contact* window is displayed. Select **New Contact** to add a contact who is not a ProSight Portfolios user; or Select **Existing User (Contact)** to add an existing ProSight Portfolios user as a contact for the item. From the dropdown list, select the ProSight Portfolios user to be added to the contact list. Click **OK**. If you selected a ProSight Portfolios user as the new contact, the Contacts tab is refreshed and the user's name and information is displayed in the contact list. If you elected a ProSight Portfolios user as a new contact, the Contacts tab is refreshed and the user's name and information is displayed.

# ProSight Orientation and Navigation



Enter the contact information as requested. You can enter a brief description or the new contact's connection to this item and include Hypertext.

Click **OK** and the new contact is displayed in the contact list.

Fill in the following information:

First Name:  Last Name:

Job Title:  Phone:

Company:

Department:  Fax:

Address:  E-mail:

Description:

OK Cancel

## Editing and Removing Contacts

## ProSight Orientation and Navigation

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In the *Contacts* tab, highlight the row of the contact to be edited and click Edit or double-click the row of the contact to be edited.

Edit the contact information and click **OK**.

To remove a contact, select a contact from the list and click Remove. Click **OK**.

### Exercises – Working with Workbooks

#### 1. Access the Workbook module

- a. Click on the Workbook Module Tab – to go to the Workbook module
- b. Workbook module should be displayed – with following Workbook tabs:
  - i. Status
  - ii. Action Items
  - iii. Lifecycle
  - iv. Deliverables
  - v. Dependencies
  - vi. Links
  - vii. Contacts
- c. Click on the Workbook tabs and verify the work areas:

#### 2. Access / View Project Documents:

- a. Project documents / links are available and accessible from the Links Tab of the Workbook Module
- b. Click on the Links Tab to go to the documents / links work area
- c. Click on the Link (url) to access the documents / links

#### 3. Add a Link / URL

- a. Click on the Workbook Module Tab – to go to the Workbook module
- b. Click on the “Links” Tab of the workbook module:
- c. Click on the “NEW” button on the right corner of the screen
- d. On the “New Link” Screen enter the link name, and the actual link/url
- e. Click OK to upload the link
- f. Verify that the link is uploaded and is available on the Links-Tab work area

#### 4. Upload a Document

- a. Click on the Workbook Module Tab – to go to the Workbook module
- b. Click on the “Links” Tab of the workbook module:
- c. Click on the “UPLOAD” button on the right corner of the screen
- d. On the “Upload Document” window, browse and select the document you want to upload
  - i. Click on the “Upload Document” window - security tab to set document access security
- e. Click OK to upload the link
- f. Verify that the document is uploaded and is available on the Links-Tab work area

## Section 5 My Portfolios

'My Portfolios' displays private “favorite” sets of related URLs and guided workflows that provide users with direct access to anywhere in Portfolios, including portfolios documents, and URLs including local or web addresses. Text objects may be added to ease the organization of those links in groups and to add titles and explanatory text. These workflows are displayed as links with descriptions, in user defined folders in a new left bar now available in any of the Portfolios modules. Folders are organized in a new 'Links' hierarchy and may be managed as any other Portfolios folders.

### Navigating My Portfolios

To open My Portfolios:

Select **View** from the menu bar → **Show/Hide My Portfolios** from the menu list.



My Portfolios captures CTP’s workflows, navigation, collaboration, and assists with training. My Portfolios displays available process links for each user. My Portfolios supports the following link types:

- Portfolios Links
  - Forms and Form Tabs
  - Scorecards
  - Investor Maps
  - Workbooks
  - Dashboards
- Web Links
- Documents Links

## ProSight Orientation and Navigation

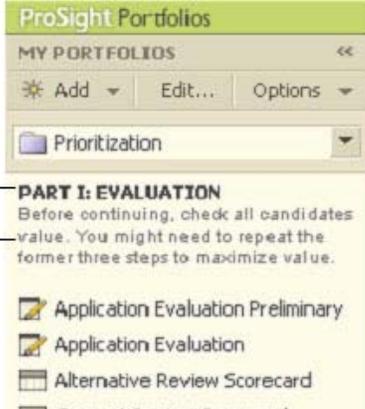
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- Uploaded Portfolios Documents
- Text

Below are examples of a Portfolio Scorecard Link and a Text Object in My Portfolios:

Module Icon      Link Name      Link Description

Module Icon	Link Name	Link Description
	<a href="#">Alternative Review Scorecard</a>	The alternatives are rated against each other to find the candidate with the greatest value.



Text Object title — **PART I: EVALUATION**

Text Object Description — Before continuing, check all candidates value. You might need to repeat the former three steps to maximize value.

-  Application Evaluation Preliminary
-  Application Evaluation
-  Alternative Review Scorecard
-  ~~Scorecard~~

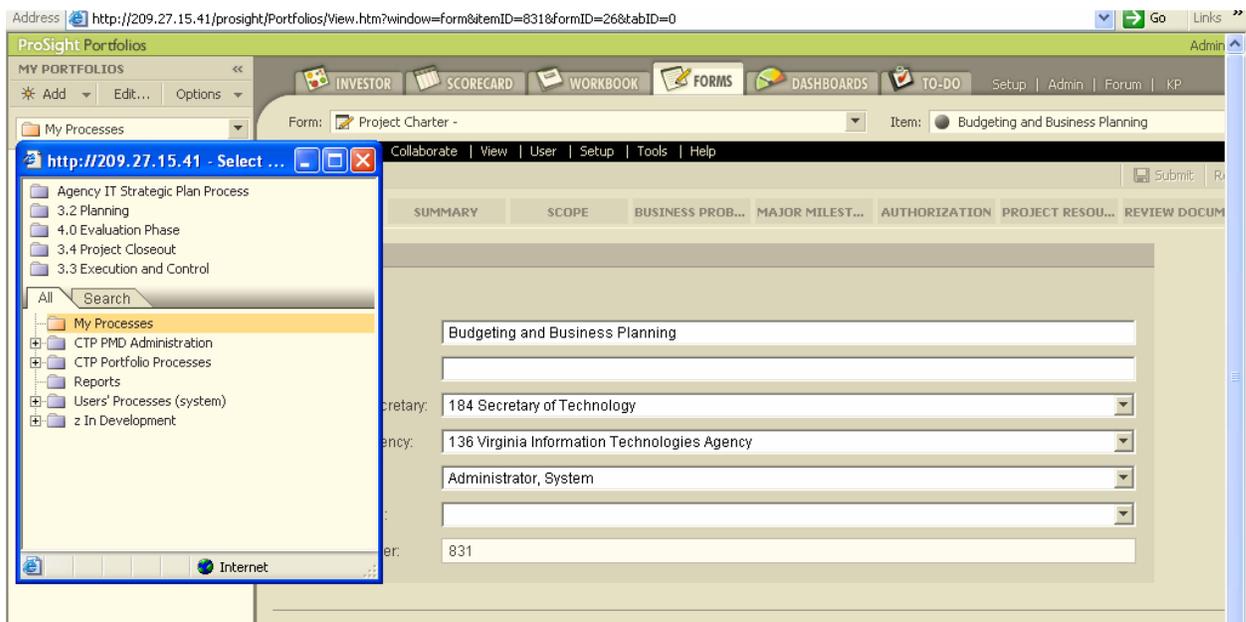
### Creating a Personal Process Folder within CTP

My Portfolios is a tool in ProSight Portfolios that can take a process such as Project Portfolio Management and design a workflow of all the various steps needed to capture information, analyze and help make decisions on an organizations portfolio of projects.

Project Portfolio Management provides a portfolio management governance structure that allows you to manage projects (and other investments) from inception to completion while delivering maximum value. The process described here assumes you are managing a portfolio of projects.

With each system user, ProSight Portfolios creates a private folder under My Processes that allows each user to create a personal process folder structure.

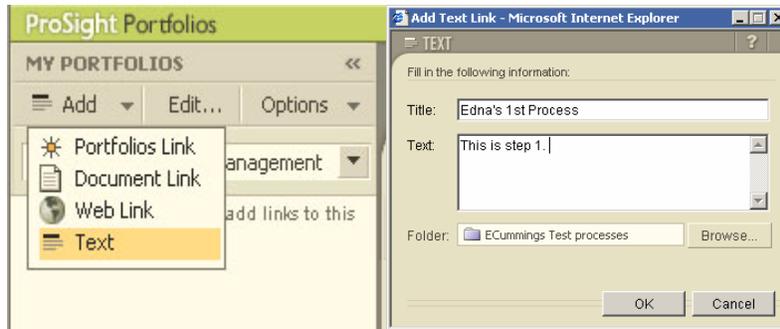
To Create a Personal Process Folder in **My Portfolios**, Select →**My Processes** folder.



Select → **Add** → **Text**.

## ProSight Orientation and Navigation

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Select **OK**, verify your new information in My Processes.  
Select the function you wish to perform, “Add, Edit or Options.”

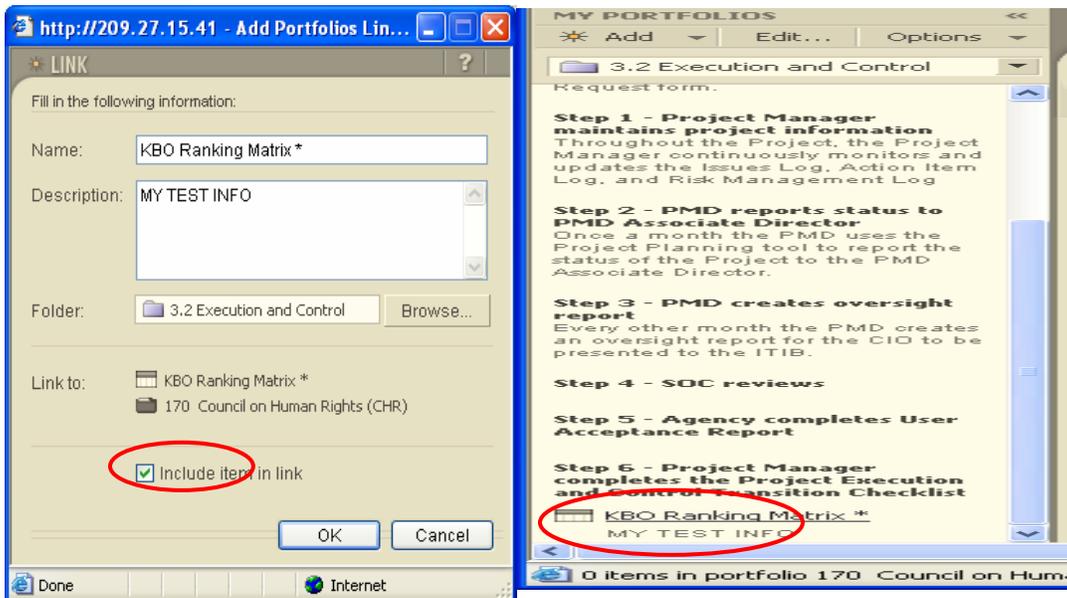


**To Attach a Portfolio Link** (form or document), Select → **Module** (the module you want to display in My Portfolios) → **Portfolios link**



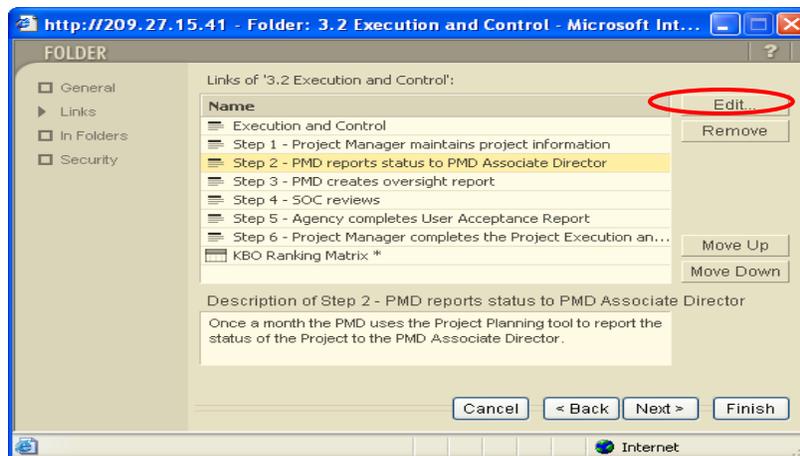
The screen appears for you to add or verify the Portfolios Link. Enter **MY TEST** info as shown below and click **OK**. The **Portfolio** appears. *Be sure to indicate whether or not you want the*

*specific Item to be included in the link.* NOTE: Always verify you have the Portfolio in the correct Process folder.

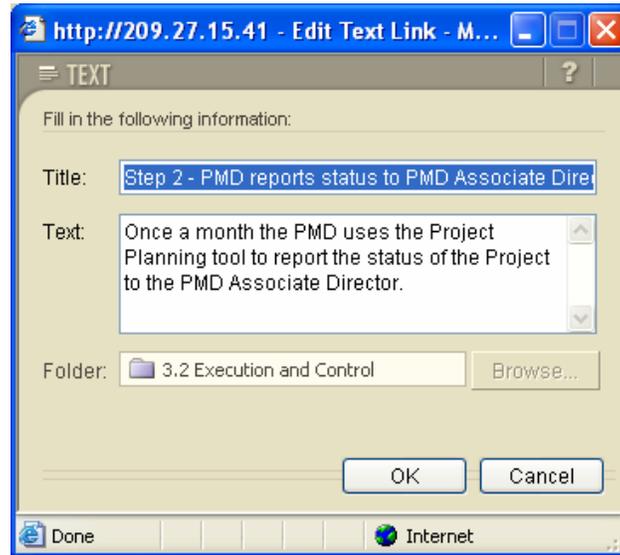


## Editing My Portfolios.

To Edit My Portfolios, click on Edit. A list of links selected My Portfolios Folder appears. Highlight the link you wish to edit.



A Screen appears that displays the Title and Text you wish to edit.



You may then **Edit, Move Up or Down or Remove the Links.**

## Exercises – Working with My Portfolios

### 1. Open My Portfolios:

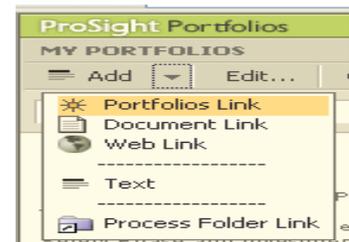
- Select View from Menu Bar
- Select Show/Hide My Portfolios from the drop-down list
- My Portfolios window/frame will be displayed on the left side of the screen

### 2. Create a Personal Folder:

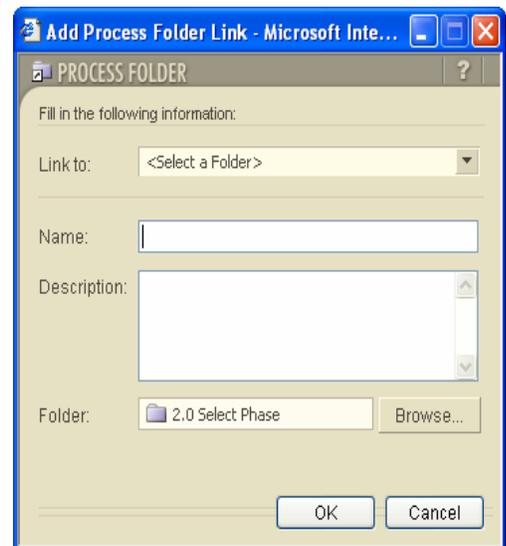
- Select My Processes Folder
- Select Add Text by clicking on the drop-down next to the “ADD” button of My Portfolios
- In the add text window > enter data
- Click OK to save and view the information in My Processes Folder

### 3. Add a Folder Link:

- Select My Processes Folder
- Select Add “Process Folder Link” option by clicking on the drop-down next to the “ADD” button of My Portfolios



- In the add Process Folder Link window
  - Select the Folder
  - Enter Name and Description
  - Click OK to save and view the Folder Link in My Processes Folder



Please refer to “How To’s” in Appendix – 6 for step by step instructions on How to Customize My Processes Folder

## APPENDIX: Basic Portfolio Components:

**Interactive Views:** These views are the modules and associated components of ProSight Portfolios wherein users are able to enter data or access information to support business functions.

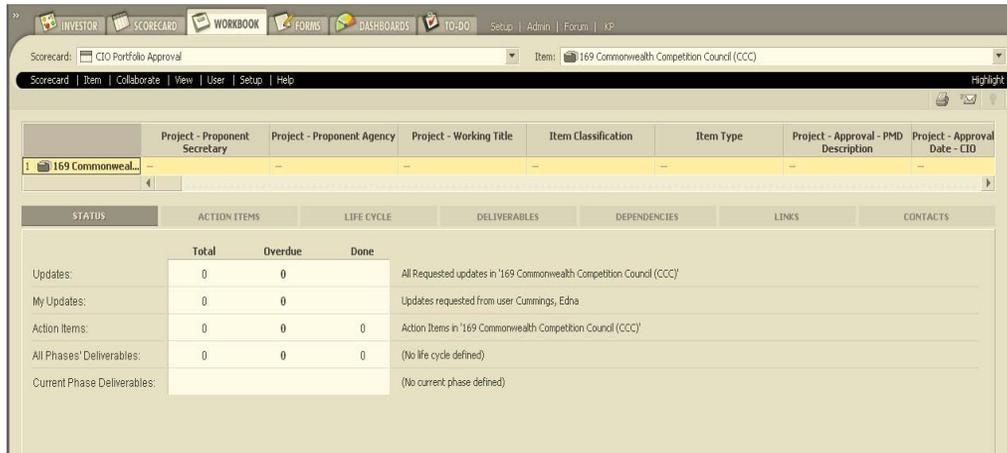
- **Modules:** ProSight Portfolios contain various modules (i.e., Investor Map, Scorecard, Workbook and Dashboard) wherein users enter and view the organization’s data. The administrator can specify which modules are active for each user/group, including the Setup module that prevents users from accessing the *Setup* window.
- **Forms:** A Form is the data-driven module of ProSight Portfolios. Through Forms, users enter system data or use as a reporting tool that enables user to view, summarize, and categorize data.
- **Form Tabs:** Form Tabs are the different sections in a form. Forms may contain as many as twenty form tabs. You can use the same form tab in many different forms.



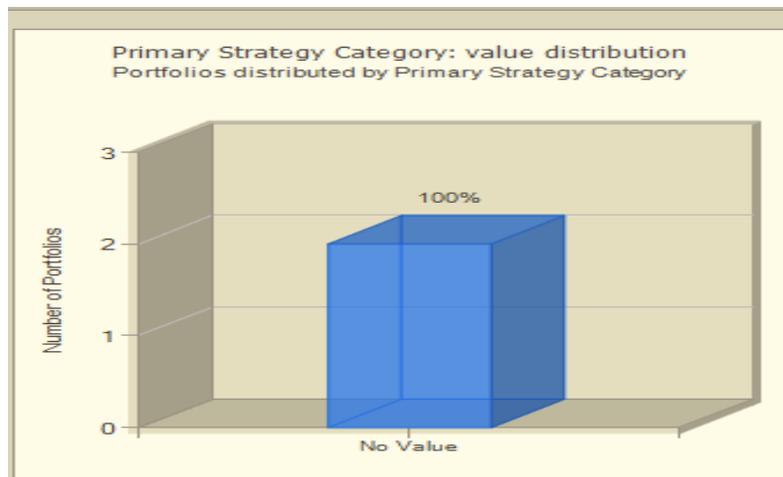
- **Scorecards:** Scorecards are tables to track and manage the performance of items and portfolios according to predefined lists of categories. Scorecards are used to view item and portfolio values by color and shape-coded indicators. Additionally, users can create multiple scorecards and group related performance categories into a single view.

Portfolios	Health	Overall Schedule Health	Current Phase Schedule Health	Percent Complete	On Budget	Dvr Health	De... He...
129 Department of H...	Green	★ Missing Dates	◇ No Current Phase	-- --	-- OK	★ --	--
1 129 DHRM Procur...	Green	★ Missing Dates	◇ No Current Phase	-- --	-- OK	★ --	--
2 129 DHRM Projects	Green	★ Missing Dates	◇ No Current Phase	-- --	-- OK	★ --	--
3 129 Agency Head	Green	★ Missing Dates	◇ No Current Phase	-- --	-- OK	★ --	--
4 129 ALTR	Green	★ Missing Dates	◇ No Current Phase	-- --	-- OK	★ --	--

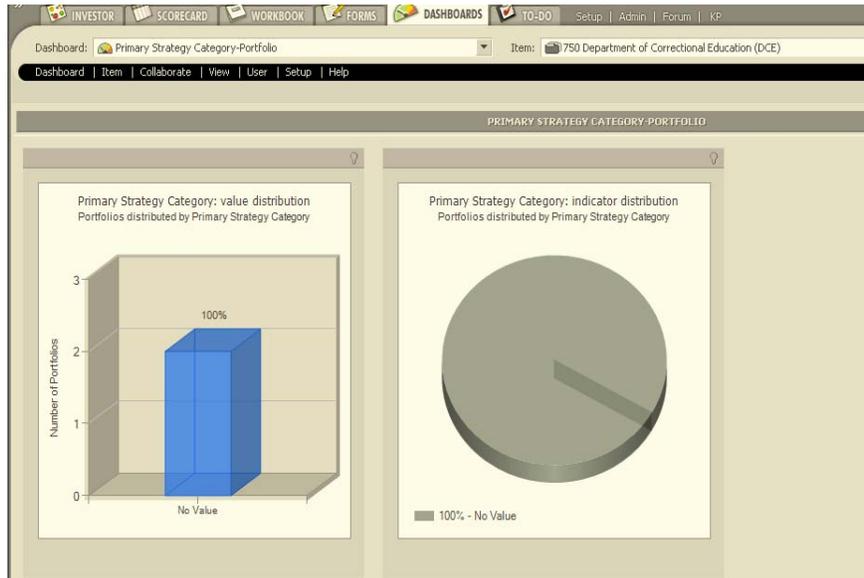
- **Workbooks:** The workbook module allows user to manage project-related information about a single investment item. The workbook provides functionality to manage a project's schedule, deliverables, action items, and dependencies. The workbook can be integrated directly into Microsoft Project Server (when available) using MS Project Server Bridge.



- **Graphs:** Graphs display historical or current information about an item. ProSight Portfolios enables users to create three types of graphs. Distribution graphs display information in the form of a bar chart or a pie chart, trend graphs display a line graph indicating performance over time, and scatter graphs display data in the form of points indicating values on the x-axis and y-axis.



- **Dashboards:** A Dashboard is a collection of graphs that provide detailed technical and business information about technology investments and performance categories. A Dashboard enables managers to focus in on key performance indicators and trends critical to their specific areas of interest and responsibility.

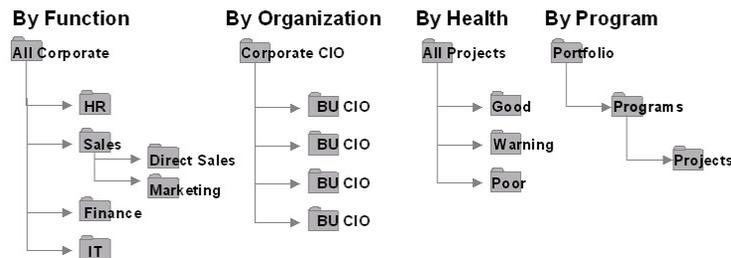


- **Maps:** Maps are the strategic center of ProSight Portfolios. Investor maps senior management to view business activities in terms of risk, investment type, budget, etc. They provide managers with a flexible, visual tool for slicing key performance data according to strategic goals. Maps also provide “What-If” capability to plan and align strategic goals.



**Hierarchies:** Hierarchies are the business units within ProSight Portfolios. All ProSight Portfolios' objects are organized in hierarchies. Arranging objects in hierarchical trees creates an organizational map that defines the organizational environment and makes it easier to navigate among objects and views. Hierarchies also support the process of applying and managing system security.

- **Portfolios:** A portfolio is a collection of related items that are grouped to manage and view performance of common business activities and goals. Users can also group related portfolios into a single portfolio. Portfolios can be grouped according to any parameter you define, such as type of business activity or geographic region.



- **Folders:** A folder is a collection of related objects. Each object type has its own folder hierarchy. For example, it is not possible to have Scorecards in a Maps hierarchy. Each folder hierarchy has its own **'root.'** Objects and folders may appear in multiple folders. However, each object has a single home folder and other instances of that object are referenced objects.

**Access:** Within ProSight Portfolios user rights or access are controlled by the systems administrators.

- **Users:** Users are all the individuals in the organization with access to ProSight Portfolios. Use the *New User Wizard* to enter information for each user in the company, such as password, privileges, login name, user preferences, and contact information.
- **User Groups:** A User Group is a group of ProSight Portfolios users who are all assigned identical rights. Systems administrators use the *User Group Wizard* to create new user groups and define security parameters for an entire group, rather than individually defining security for each system user.

**My Portfolios:** My Portfolios displays private or “favorite” sets of URLs and guided workflows that provide users with direct access to anywhere in Portfolios, including portfolio documents, any URL and local or web address. Text objects may be added to ease the organization of those links in groups and to add titles and explanations.



**MY PORTFOLIOS**

☰ Add ▾ Edit... Options ▾

📁 1.0 Pre-Select Phase

Back | Forward

**Pre-Select Phase**  
In the Pre-Select Phase, agencies conduct initial analysis of potential investments. A preliminary business case is developed and reviewed and the investment is either Approved for Planning (APP), Identified for Preliminary Planning (IPP), or rejected.

If an investment is approved for planning it moves on to the the Select Phase.

**Step 1 - Agency completes a Preliminary Business Alignment form**  
Completing this form helps the Agency complete the Preliminary Business Case.

LINK TO PRELIMINARY BUSINESS ALIGNMENT FORM

The Complexity, Risk, and Cost Benefit Analysis tools are available for assistance.

 [Preliminary Risk Worksheet](#)

 [Project Complexity Form](#)

**Step 2 - Agency completes a Vendor Request for Information form**  
Complete this form if needed.

### APPENDIX: Definitions

**Category:** Specific information about items and/or portfolios that are usually descriptive (i.e. Name, Description, Comments), value (i.e. financials, dates, durations), or a rating (i.e. Impact = High)

**Components:** Other elements of ProSight such as trends, My Portfolios, categories, etc., are called Components

**Control:** During this phase, the progress and performance of IT investment initiatives against projected cost, schedule, and/or performance, is regularly monitored in accordance with the investment's planned review schedule.

**Dashboards:** A collection of graphs that provide detailed technical and business information about technology investments and performance categories.

**Evaluate:** The Evaluate Phase includes all investments that have been in operation six or more months. The purpose of the Evaluate Phase is to compare actual performance results and benefits to the results that were initially projected.

**Folder:** A collection of related objects

**Forms:** The data-driven module of ProSight Portfolios.

**Form Tabs:** Form Tabs are the sections of a form that contain specific information located at the top of the form. A form can have up to 20 tabs.

**Graphs:** Displays of historical or current information about an item in chart form.

**Hierarchies:** The business units within ProSight Portfolios established by an organization to define a portfolio management structure and security.

**ITIM:** Information Technology Investment Management; consists of four phases, Pre-Select, Select, Control and Evaluate that are used to determine the investments to include in an organization's IT portfolio.

**Indicator:** Displays or symbols which map to category values. E.g. Health: Good, Moderate, Poor

**Investment:** Initiatives or (events, capabilities, etc) or business units that consume or plan to consume resources, such as time, people, etc. A technology investment such as services or

items, is a collection of deliverables, milestones, tasks and the resources allocated to complete the work.

**Item:** Any investment the user tracks in ProSight Portfolios (generally interchangeable with “project or procurement”)

**Knowledge:** A repository of information unique to the current display.

**Life Cycles:** An organization-wide paradigm that consists of the common phases of a certain activity type.

**Links:** A private or “favorite” sets of URLs and guided workflows in various components of ProSight.

**Investor Maps:** The strategic center of ProSight Portfolios that enable management to view business activities in terms of risk, investment type, budget, etc (sometimes referred to as a ‘bubble chart.’)

**Module:** Areas in ProSight where users can navigate, i.e. Investor Maps, Scorecards, and Forms

**Phases:** A sequence of activities in ProSight that must be completed before you can progress to the next activity or phase

**Portfolio:** A portfolio is a collection of related items, which are grouped to manage and view performance of common business activities and goals.

**Pre-Select:** The Pre-Select Phase documents a proposed investment’s support of an agency’s mission, strategic goals, mandates and the Commonwealth of Virginia’s vision and objectives as set forth by the Council on Virginia’s Future.

**Scorecards:** Tables to track and manage the performance of items and portfolios according to predefined lists of categories

**Users:** Users are all the individuals in the organization with access to ProSight Portfolios.

**Select:** The ITIM phase that decides from among the investments identified in the Pre-Select Phase which investments to pursue because they best support an agency’s mission.

**User Groups:** A User Group is a group of ProSight Portfolios users who are all assigned identical rights.

**Value Lists:** Defined data types, such as ‘high, low, medium,’ etc.

**Workbooks:** The module that allows users to manage project-related information about a single investment item.