

Commonwealth of Virginia

Advanced Capabilities Training of Primavera Portfolios

Version 1, Primavera Portfolios 7.5 SP2

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Introduction

This document will provide the user with insights into Primavera Portfolios Clipboard capabilities, specifically regarding the Project Management Division (PMD) Commonwealth Technology Portfolio (CTP) configuration and its user environment. CTP represents the commonwealth's awarding winning efforts concerning the automation of high volume Portfolio Management activities. Within CTP there are a multitude of user options and capabilities. These same capabilities allow PMD to capture the desired IT projects for the commonwealth, align them with the Governors Goals, Commonwealths Missions, and Management Goals. Then finally to prioritize them to determine which efforts will receive funding. This information is then appropriately summarized and presented to the CIO Council on a periodic bases.

The focus of this document will be on the advanced capabilities offered by CTP. Those capabilities will be presented to you and described in such a manor as to allow you, the user, to make use of the capability in your daily business operations.

Clipboard (Cut & Paste)

Primavera Portfolios allows you to move data to and from Microsoft Excel spread sheets. This capability allows a user to copy blocks of data from a Scorecard or Table and perform, ad hock, user specific manipulation without having to formally request the data from the Project Management Division (PMD). This gives the user community the ability to perform their own business operation specific processing, in a timely manor, to meet unique or constantly changing requirements.



The screenshot displays the ProSight 7.0 interface. At the top, the VITA logo and "Virginia Information Technologies Agency" are visible. Below this is a blue banner with the text "ProSight 7.0 New Feature". The main content area shows a web-based form titled "Investment Business Case" with a menu bar containing "File", "Clipboard", "Collaborate", "New", "User", "Setup", "Tools", and "Help". The "Clipboard" menu item is highlighted with a yellow circle. A callout box on the left side of the screenshot lists the following features:

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

The form itself contains several questions, such as "1. Will the project solve a business need identified in your current Agency Strategic Plan?" and "3. Is this project mission critical?". The VITA logo and "Commonwealth Technology Portfolio (Development Suite)" are also visible in the top right of the interface. The URL "www.vita.virginia.gov" is shown at the bottom left, and the number "2" is at the bottom right.

This unique capability is actually a two way street. Not only can you copy information from Primavera Portfolios, but you can also paste information into Primavera Portfolios. And you can copy and paste within Primavera Portfolios, an example being the duplication of data in one table to the same or similar table associated with a different project or procurement. When pasting into Portfolios it will ensure the data type matches the data type of the destination. This helps to reduce the occurrence of data integrity breakdowns within portfolios. If the data types do not match a preview screen will let you decide if you want to continue with the operation. If you choose to perform the paste operation, the part of the operation specific to the at risk destinations does not occur. All others will be paste and the user will be duly notified of what was done. To perform any these operations the user must have sufficient privileges to both the source and the destination data locations. If for some reason you are unable to copy and/or paste first check to make sure the destination will accept data input and the format of the data is correct. If the destination will accept user input but you are still unable to paste please contact PMD to determine if you have sufficient privileges. The figure below shows the menu selections necessary to select the whole table or scorecard.



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

The screenshot displays the 'Commonwealth Technology Portfolio (Development Suite)' interface. On the left, a list of active approvals is shown, including items like 'Center of Excellence', 'Customer Manag...', 'Document Manag...', 'Data Storage', 'EMC/FC', 'FMS Project', 'Integrated Case', 'Integrated Prod...', 'Integrated Ware...', 'Law Enforcement', 'Payment Manag...', and 'Phone 2 and 3 W...'. The main area shows a table with columns for 'Proposed Agency' and 'Project Status'. Below this, a 'Planned Value & Actual Costs' table is visible, with columns for 'Planned Cost to Date' and 'Actual Cost to Date'. The table includes rows for 'Internal Staff Labor', 'Services', 'Software & Funds', 'Hardware', 'Maintenance', 'Facilities', 'Telecommunications', 'Travel', 'PWA', 'Contingency Risk', and a 'Total' row.

	Planned Cost to Date	Actual Cost to Date
Internal Staff Labor		14,698,572.46
Services		379,850,394.44
Software & Funds		6,110,000.74
Hardware		3,792,119.14
Maintenance		790,627.00
Facilities		412,170.00
Telecommunications		447,000.00
Travel		208,547.00
PWA		417,000.00
Contingency Risk		2,158,419.00
Total		21,914,688.64

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The end result of selecting the whole scorecard is shown below.


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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



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If you desire to copy a block of cells in a Table or Scorecard the following slides will allow you to visualize the buttonology required.



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. A table titled 'Planned Value & Actual Costs' is displayed. The table has three columns: 'Planned Value & Actual Costs', 'Planned Cost to Date', and 'Actual Cost to Date'. A context menu is open over the 'Planned Cost to Date' column header, with the 'SELECT TABLE' option highlighted. The table data is as follows:

Planned Value & Actual Costs	Planned Cost to Date	Actual Cost to Date
Advanced Staff Labor	1,300,174.00	
Services	4,481,000.00	
Software - Tools	1,014,000.00	
Hardware	470,000.00	
Hardware - Tools	0.00	
Facilities	0.00	
Telecommunications	0.00	
Training	0.00	
ITSM	0.00	
Contingency Risk	381,860.00	
Total	8,647,034.00	

- 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

To copy the desired block there are two options; you can copy from the clipboard menu or you can use the Ctrl+C keyboard shortcut. The paste operation is similar; you can use the clipboard menu or the standard Microsoft accepted methods (i.e. Ctrl+C or right click). The paste operation will be followed by a verification window allowing you to verify the changes. The two figures that follow provide an example of this.




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	245	215	Proposed	4
3 Accounts Payabl...	1995	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	3
7 APC Plant Control...	1988	Decommission	59			2
8 Asset Managemen...	1999	Maintain	606			3
9 Back-up & Recov...	1991 year	Outsource	409			2
10 BPM System	1987	Maintain	477			2
11 Business Conting...	1987	Decommission	78			2
12 Call Centre System	1988	Maintain	899			2
13 Clinical Trials Sys...	1990	Decommission	59			4
14 Collections Mana...	1991	Maintain & Upgrade	271			4
15 Content Manage...	2005	Build	493			4
16 CRM System	1991	Maintain & Upgrade	279			4
17 Customer Self Ser...	1991	Evaluate	410			2
18 Data Modeler		Evaluate	403			3
			194			3
			534			

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

•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

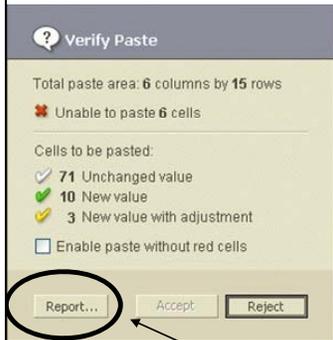
- Two Verify Paste views;
 - Accept if cells can be pasted,
 - Reject if cells cannot be pasted

- Hovering above the cell lets you see the old and new values, and the reason if the value cannot be pasted in a tooltip

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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

Additionally, a Scorecard Paste Report can be created that will allow the user to record the activity they performed if it should be necessary for quality control purposes. The two figures that follow outline and provide an example of the information available in the report.

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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

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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	Lots	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	●	●	-

Additionally, a Table Paste Report can be created that will allow the user to record the activity they performed if it should be necessary for quality control reasons. The two figures that follow outline and provide an example of the information available in the report.

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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

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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	—	8:46	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	

Wrap – Up

There are a few points that are considered best practices;

- Copy information from Primavera Portfolios to Excel as this ensures the individual Excel cells are formatted in a way to facilitate the copy and paste of information back into Primavera Portfolios.
- The Paste preview should be reviewed with care as pasted data is automatically checked for data type correlation, not content.
- The destination of the paste will determine when the data is written to the database.
 - o If you are pasting into a Scorecard the write occurs immediately after the user accepts changes.
 - o If you are pasting into a Table the write occurs when the form changes are submitted.