Commonwealth of Virginia

Advanced Capabilities Training of Primavera Portfolios

Version 1, Primavera Portfolios 7.5 SP2
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 spreadsheet. This capability allows a user to copy blocks of data from a Scorecard or Table and perform, ad hoc, 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 manner, to meet unique or constantly changing requirements.

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**ProSight 7.0 New Feature**

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

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 end result of selecting the whole scorecard is shown below.

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.
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

– 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.

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

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

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

Scorecard Paste Report

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

Data packet by "<logged in user>" into "<Scorecard Name>", Sep 23, 2007

<table>
<thead>
<tr>
<th>POSTED CELLS</th>
<th>ENCRYPTED CELLS</th>
<th>WHITE</th>
<th>GREEN</th>
<th>ORANGE</th>
<th>RED</th>
<th>RESULT</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 Accounts Receivable - Credit</td>
<td>Strategic Score %</td>
<td>81</td>
<td>81</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Risk Score %</td>
<td>33</td>
<td>33</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Priority</td>
<td>High</td>
<td>High</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Funding Status</td>
<td>Funded</td>
<td>Funded</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Life Cycle</td>
<td>Concept</td>
<td>Concept</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Budget</td>
<td>750,000</td>
<td>750,000</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Goal Indicator</td>
<td>0</td>
<td>0</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td>18 Automated Audit Reporting</td>
<td>Strategic Score %</td>
<td>61</td>
<td>61</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Risk Score %</td>
<td>51</td>
<td>51</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Priority</td>
<td>Medium</td>
<td>Medium</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Funding Status</td>
<td>Funded</td>
<td>Funded</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Life Cycle</td>
<td>Design</td>
<td>Design</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Recs/Recs %</td>
<td>50 Recs/Recs</td>
<td>50 Recs/Recs</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Goal Indicator</td>
<td>0</td>
<td>0</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td>19 Customer Self Service</td>
<td>Strategic Score %</td>
<td>67</td>
<td>67</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Risk Score %</td>
<td>64</td>
<td>64</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Priority</td>
<td>Low</td>
<td>Low</td>
<td>UE</td>
<td>UE</td>
<td>UE</td>
</tr>
<tr>
<td></td>
<td>Funding Status</td>
<td>Executed</td>
<td>Executed</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>Life Cycle</td>
<td>Implementation</td>
<td>Implementation</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Budget</td>
<td>300,000</td>
<td>300,000</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
<tr>
<td></td>
<td>Goal Indicator</td>
<td>0</td>
<td>0</td>
<td>OK</td>
<td>OK</td>
<td>OK</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Virginia Information Technologies Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Form Paste Report</strong></td>
</tr>
</tbody>
</table>

- 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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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.