

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 Scorecard Creation 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.

Scorecard Creation

The scope of this document is to provide the necessary instructions for a user to create a Scorecard. The entry point, and therefore the start of the discussion, will be the Scorecard menu on the base Primavera Portfolios display. This document will show the user how to initiate the Scorecard creation wizard and use it to construct a Scorecard. Additionally, we will show the user how to use/view the Scorecard in an integrated fashion with existing Portfolio folders. A section on sorting, was not in the original scope of the document, but has been provided only as an introduction and an attempt to round out this document

In this document we will walk step-by-step through the process of creating a basic Scorecard using AITR level Primavera Portfolios capability. We will first navigate to the Scorecard portion of Primavera Portfolios, and then initiate the Primavera Portfolios wizard that allows a user to create a Scorecard.

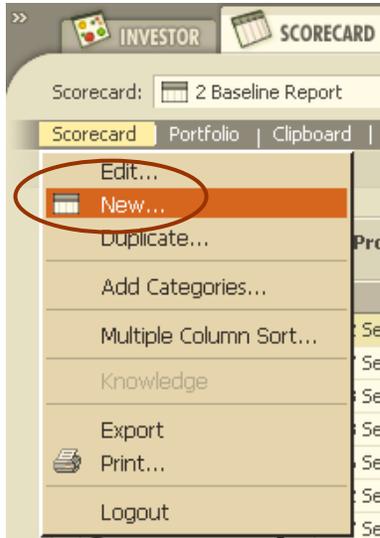
The first step is to navigate to the Scorecard portion of Primavera Portfolios. Please login to Primavera Portfolios and select the Scorecard tab as shown below.



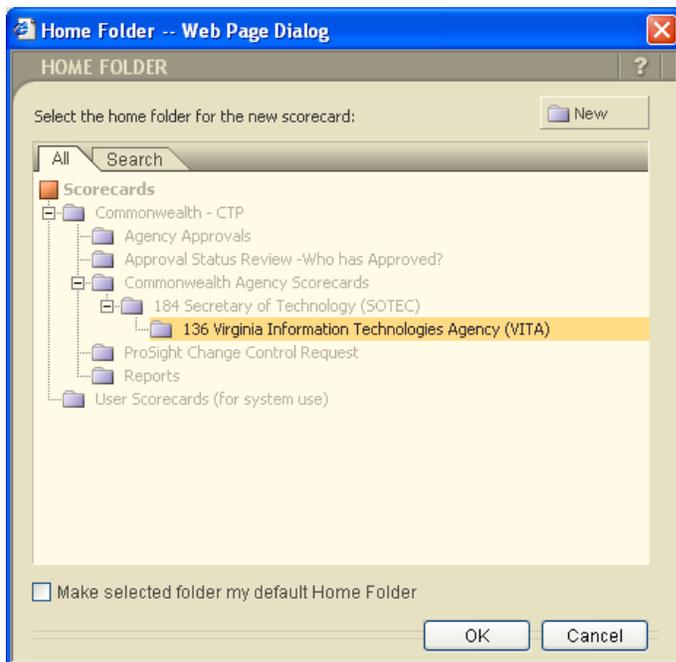
Next, please left click on the Scorecard menu as show below



This action will present a menu of options that are available to us. In this example we will be creating a new Scorecard, so please left click on the  New... option as shown below



The next window you will see is a prompt for the location in which to store your scorecard. To facilitate the user experience, each agency will have its own storage location. And, as in the example below, their storage location will be the only one visible. Our example is that of an AITR from VITA.



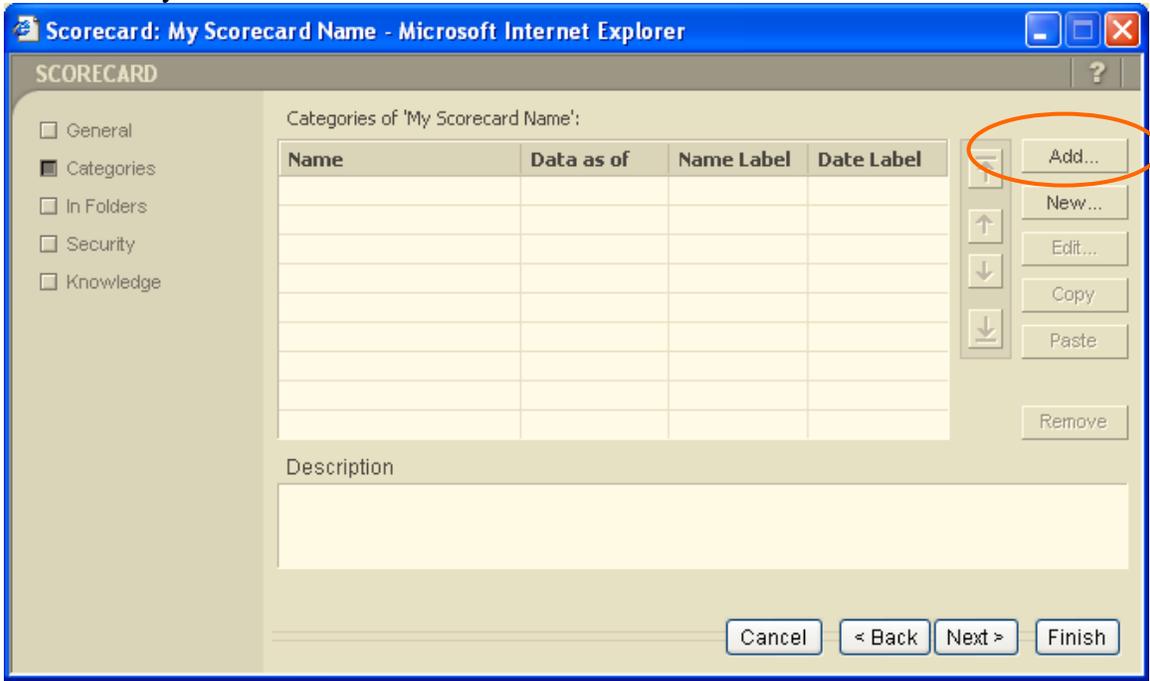
Now that we've selected the correct storage location, please supply a name for your Scorecard. In the example below the name is "My Scorecard Name"

The screenshot shows a web browser window titled "New Scorecard - Microsoft Internet Explorer". The main content area is titled "SCORECARD" and contains a sidebar on the left with the following options: General, Categories, In Folders, Security, and Knowledge. The main area is titled "Fill in the following information:" and contains three input fields: "Name:" with the value "My Scorecard Name", "Description:" which is empty, and "Owner:" with the value "136AITRn1, 136". At the bottom right of the form are four buttons: "Cancel", "< Back", "Next >", and "Finish".

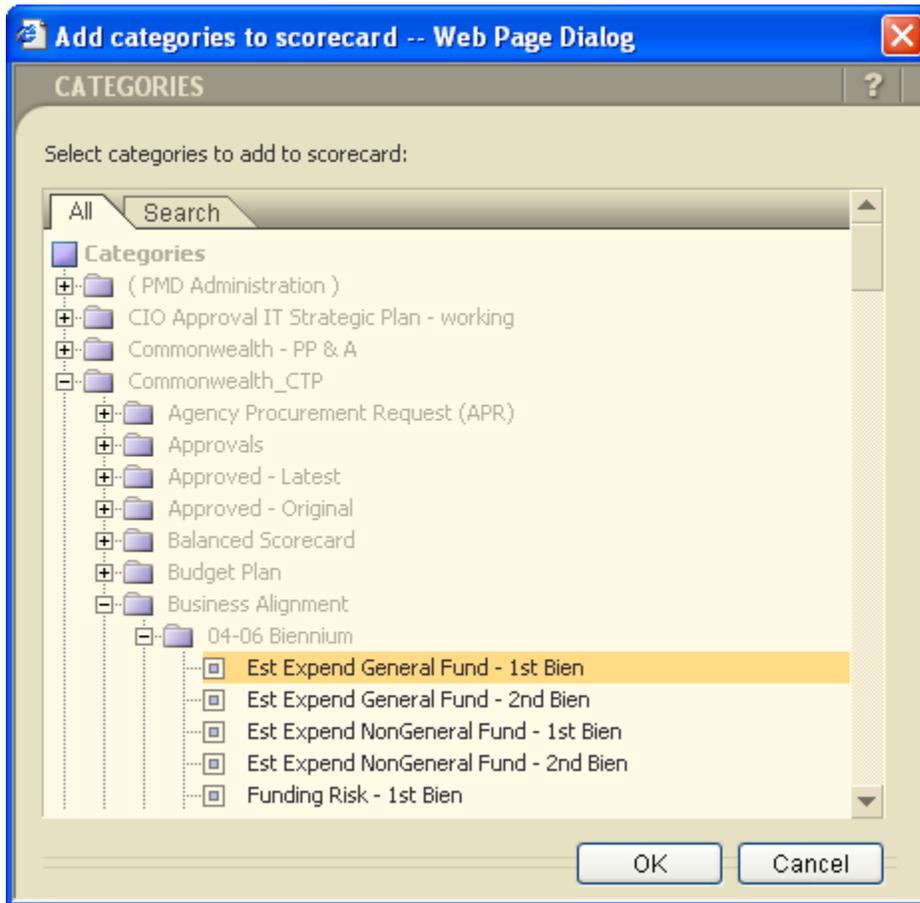
We've only just started the procedure for creating a Scorecard. We've created a name, but now we need to populate the Scorecard with Primavera Portfolios categories/columns. This is conceptually similar to columns in an excel spreadsheet in that each column has a title or subject matter that describes the type of data that will appear in the column. To that end, each Scorecard column has a title and will contain similar data. Please continue by clicking on the  Button.

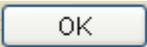


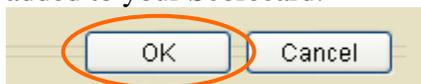
Now we will add one of those columns we were talking about. Please keep in mind that Primavera Portfolios has many wizards that will walk people through individual configuration steps. To add a column to your Scorecard click on the **Add...** button



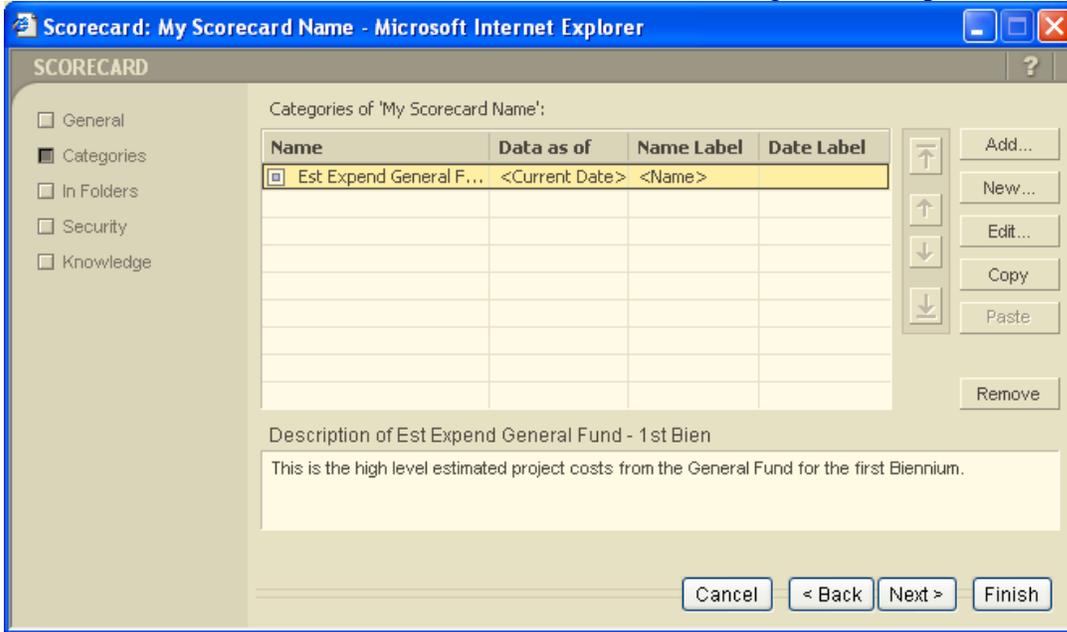
You are now presented with a list of possible categories from which you can choose. Navigation is similar to that of MS Windows folder navigation in that if you see a '+' sign you can 'open' the folder to see its sub folders. Select the desired category, in the example below we have chosen the "Est Expend General Fund – 1st Bien".



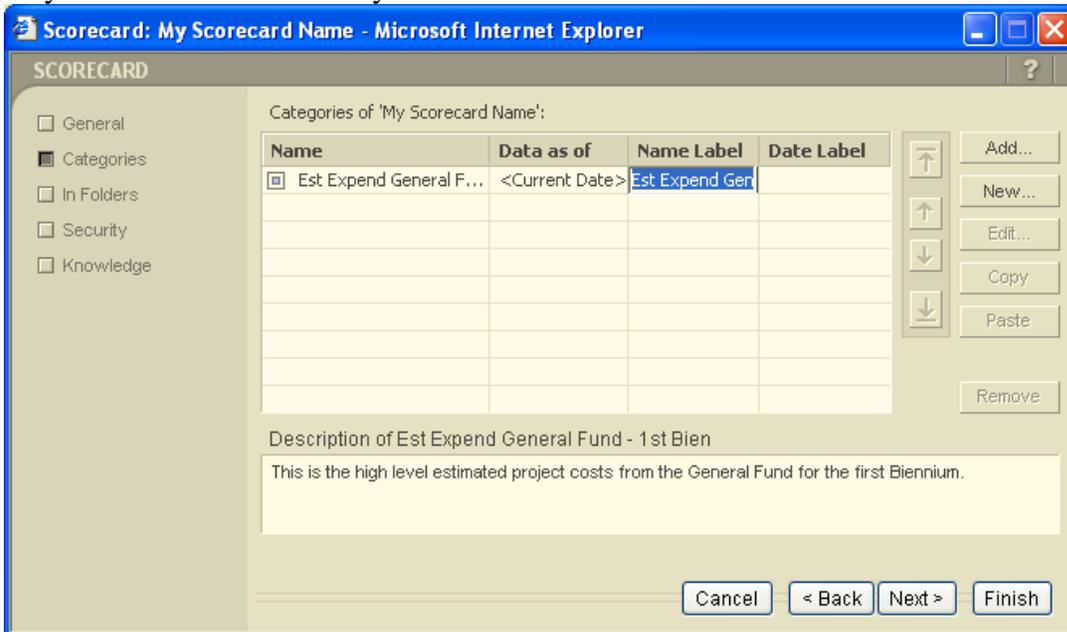
Once you have made your selection, click the  button and the chosen column will be added to your Scorecard.



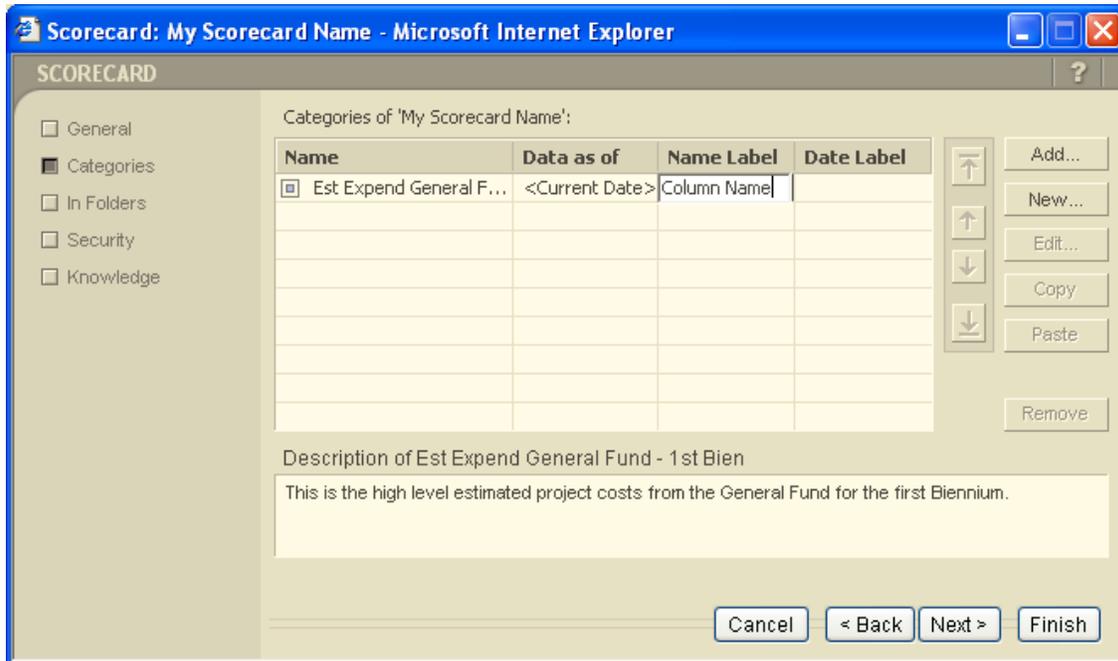
The figure below reflects the column after it has been added to your Scorecard. Note the 'Name Label' is set to "<Name>". This means the Scorecard will use the name in the 1st column as the column title. This will become clearer as we continue through the example.



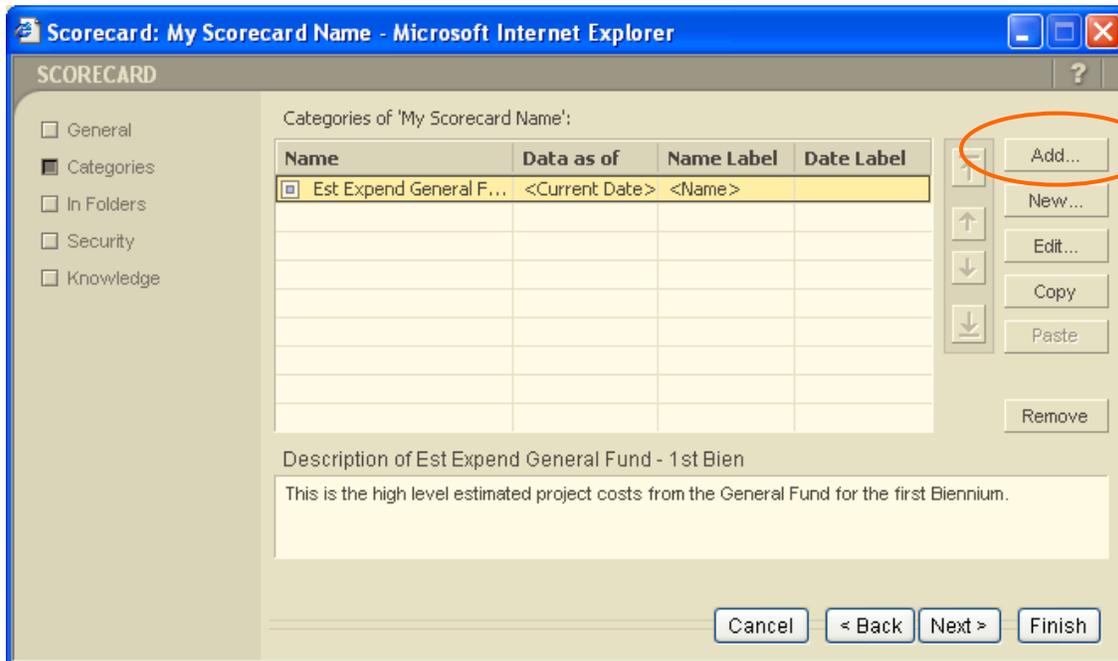
Now we will create a column name of our liking as opposed to the name in the first column. In the example below the blue highlighted area is the focus of our attention. To provide a custom name, double click on the "Name Label" of the desired column and enter the desired name. You can only add names for columns you have identified.



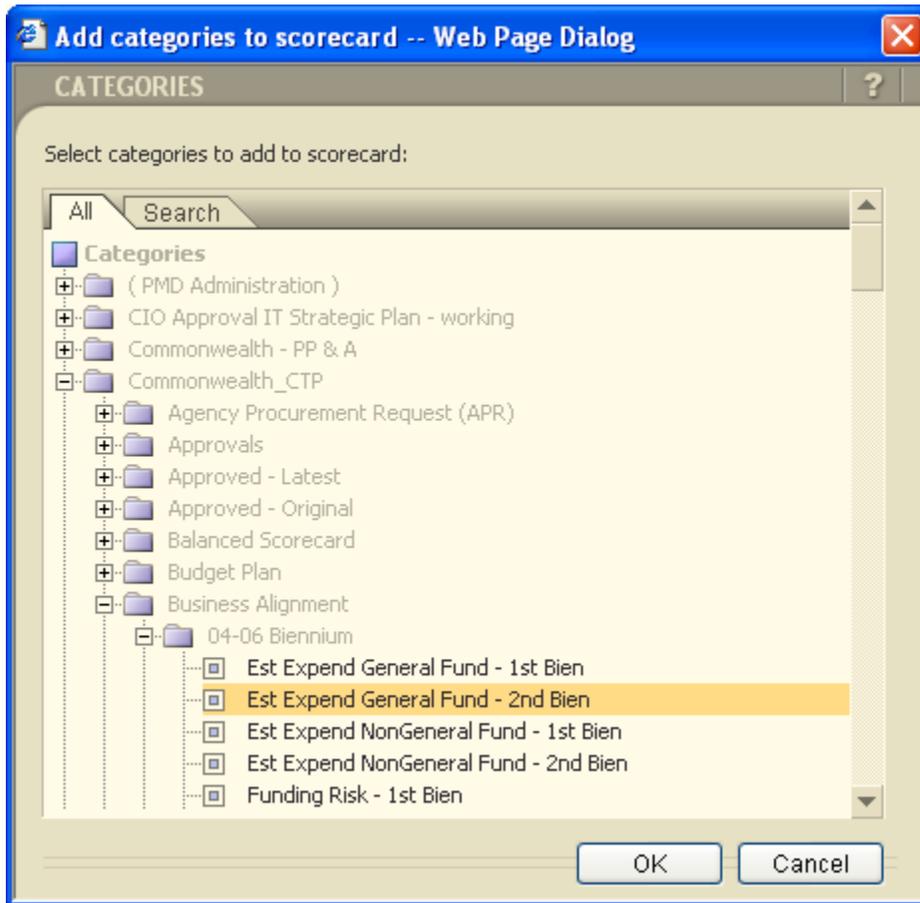
Now you can type a column name you are comfortable with. In this example we have entered “Column Name” as shown below.



Now we will add a second column, please click on the **Add...** button again.



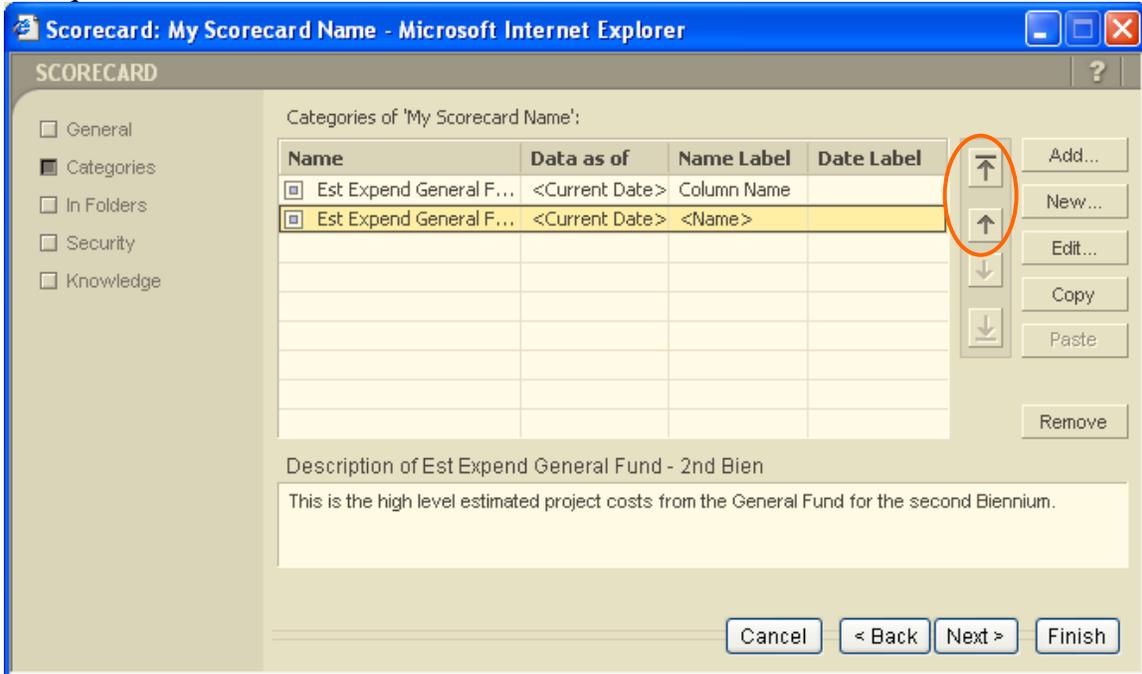
You are now presented with the list of possible categories for you to choose from; as before, navigation is similar to that of MS Windows folder navigation in that if you see a '+' sign you can 'open' the folder to see its sub folders. Select the desired category. In the example below we have chosen the "Est Expend General Fund – 2nd Bien" category.



Click on the  button to add the chosen column to your Scorecard



Notice we've added the new column as shown below. Also, now that we've added a second column, two additional buttons have now been activated, the  and  buttons. They allow us to sequence the columns in our Scorecard.



Now let's move the column left one, by moving the column up one in the list. This is accomplished by clicking on the  button.

Scorecard: My Scorecard Name - Microsoft Internet Explorer

SCORECARD

- General
- Categories
- In Folders
- Security
- Knowledge

Categories of 'My Scorecard Name':

Name	Data as of	Name Label	Date Label
<input type="checkbox"/> Est Expend General F...	<Current Date>	Column Name	
<input type="checkbox"/> Est Expend General F...	<Current Date>	<Name>	

↑
↓
↑
↓

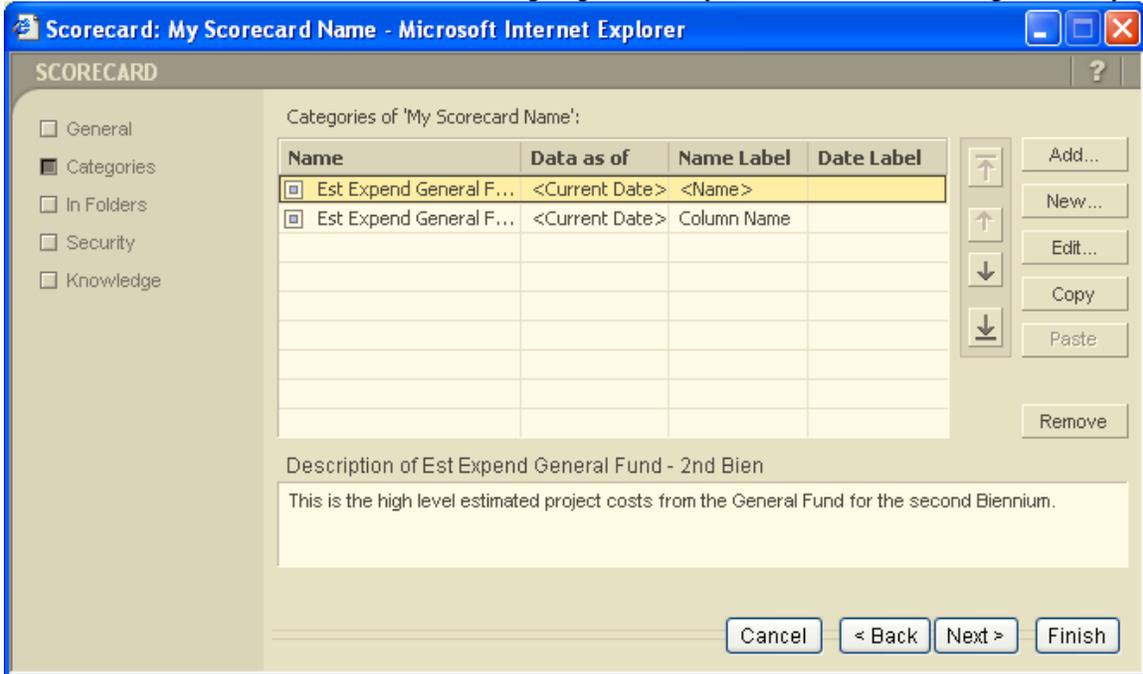
Add...
New...
Edit...
Copy
Paste
Remove

Description of Est Expend General Fund - 2nd Bien

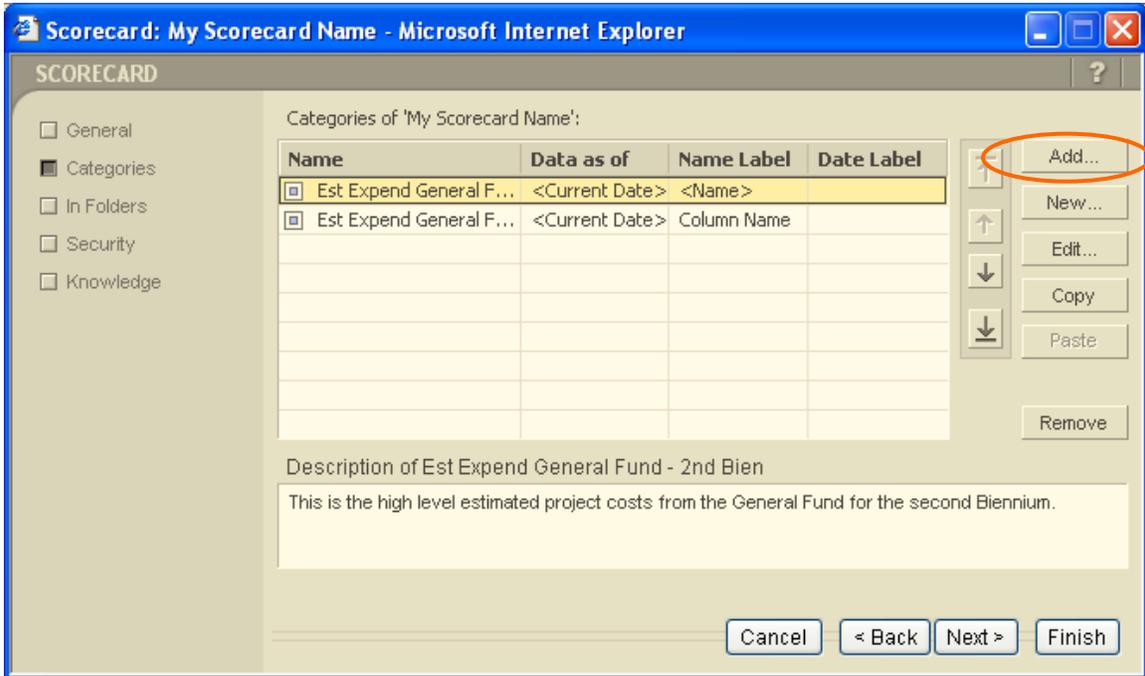
This is the high level estimated project costs from the General Fund for the second Biennium.

Cancel < Back Next > Finish

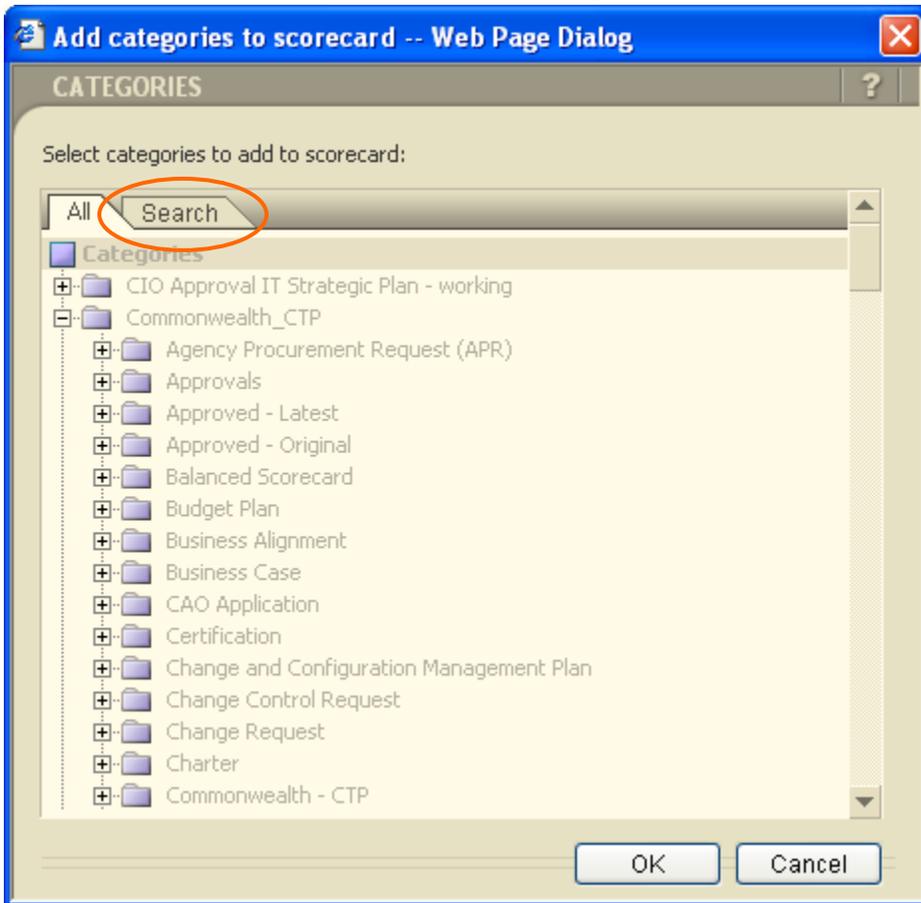
The result is shown below. Notice the highlighted entry is now above our original entry.



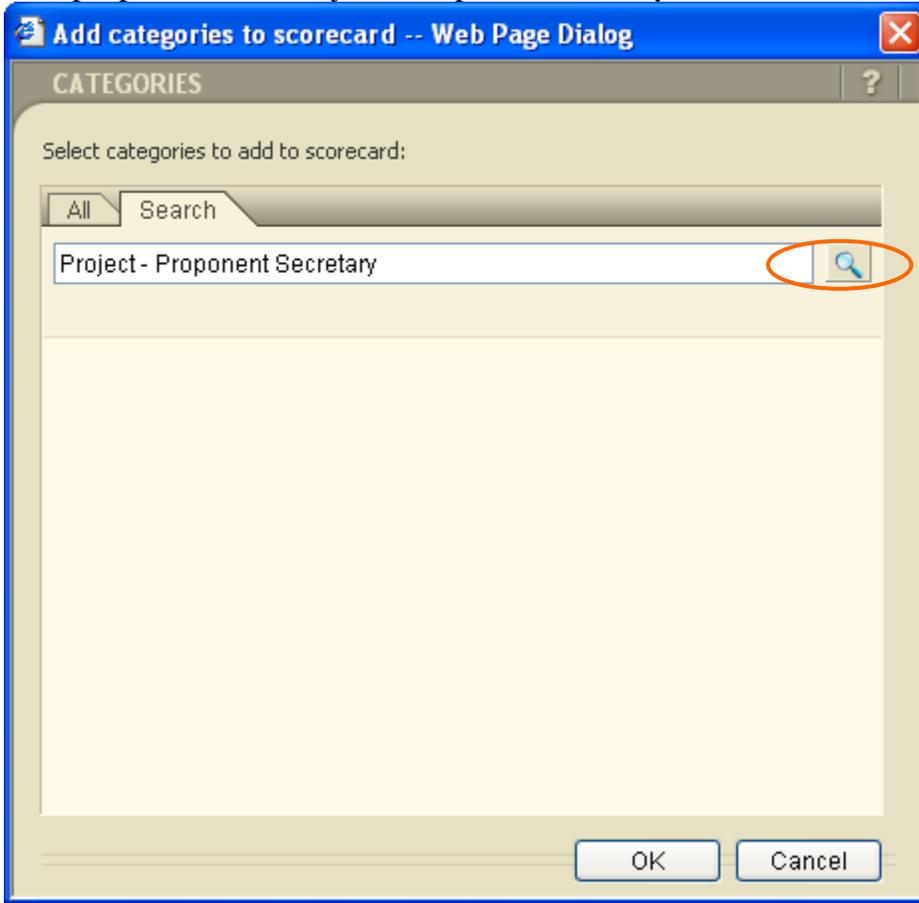
Additionally, you can add a category even if you don't know its folder location. Primavera Portfolios has the capability search for a category given some pattern to look for. You can't use wild cards, but can provide a partial name. To see an example of this please select the  button as shown below.



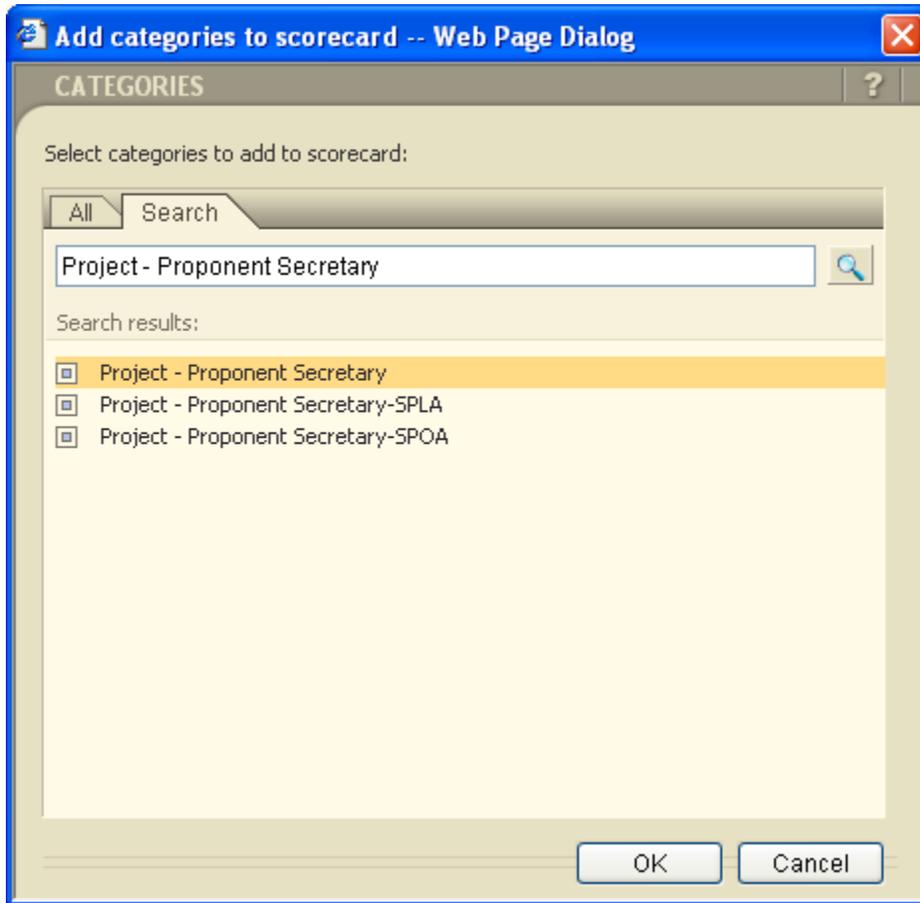
Click on the  tab as shown below



Next type the name of the category you are interested in. For purposes of this example we will use the 'Project – Proponent Secretary' category. For an explanation of how we chose this particular category please refer to the Scorecard Creation Appendix of this document. To continue with this example please enter 'Project – Proponent Secretary' and click the  button as shown below.



Select the 'Project – Proponent Secretary' as shown below.



Click on the  button to add the chosen column to your Scorecard



Notice we've added the new column as shown below.

Scorecard: My Scorecard Name - Microsoft Internet Explorer

SCORECARD

Categories of 'My Scorecard Name':

Name	Data as of	Name Label	Date Label
<input type="checkbox"/> Est Expend General F...	<Current Date>	<Name>	
<input type="checkbox"/> Est Expend General F...	<Current Date>	Column Name	
<input checked="" type="checkbox"/> Project - Proponent S...	<Current Date>	<Name>	

Description of Project - Proponent Secretary

The Secretary to whom the proponent agency is assigned or the Secretary that is sponsoring a particular enterprise project

Cancel < Back Next > Finish

We are now finished, to save your Scorecard please click the **Finish** button as shown below.

Cancel < Back Next > **Finish**

The finished Scorecard is displayed below. Please note, where we provided a column name our name is shown, if we did not provide a column name the default is the category name.

The screenshot shows a software interface with a top navigation bar containing icons for SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO, along with a Setup button. Below the navigation bar, there is a text input field for 'Scorecard:' with the value 'My Scorecard Name'. A secondary navigation bar includes links for Scorecard, Portfolio, Clipboard, Collaborate, View, User, Setup, and Help. The main content area displays a table with the following data:

Items	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
136 VITA Projects	884,529.00	4,666,497.00	—
1 ● alert test 1	—	—	184 Secretary of Technology
2 ● Alert Test 2	—	—	184 Secretary of Technology
3 ● Alert Test 3	—	—	184 Secretary of Technology
4 ● Alert Test 3 Feb 0...	—	—	184 Secretary of Technology
5 ● Alert Test 4	—	—	184 Secretary of Technology
6 ● Alert Test Project	—	—	184 Secretary of Technology
7 ● Alert Test_11 Au...	—	—	184 Secretary of Technology
8 ● Alert Test_Jun10...	—	—	186 Secretary of Transportation
9 ● Alert_Test_5 Feb...	—	—	184 Secretary of Technology
10 ● Automated Call D...	0.00	181,135.00	184 Secretary of Technology
11 ● Budgeting and Bu...	0.00	0.00	184 Secretary of Technology
12 ● Commonwealth T...	0.00	0.00	184 Secretary of Technology
13 ● Comprehensive S...	0.00	0.00	184 Secretary of Technology
14 ● Contract Manage...	—	—	184 Secretary of Technology
15 ● E-forms	0.00	0.00	184 Secretary of Technology
16 ● Electronic Bill Pre...	0.00	0.00	184 Secretary of Technology

Thank you for taking the time to step through this example and we hope you will be able to build on it to create the scorecards you find necessary to support you business efforts.

Scorecard Usage

To use a Scorecard one must navigate to the Scorecard tab, then choose both the desirable Scorecard and the Portfolio folder they wish to examine. You may ask what a portfolio folder is; it is the location where an individual Project or Procurement may reside. By focusing on an individual portfolio the user can view multiple projects, or procurements, or both filter and sequence the data they are viewing.

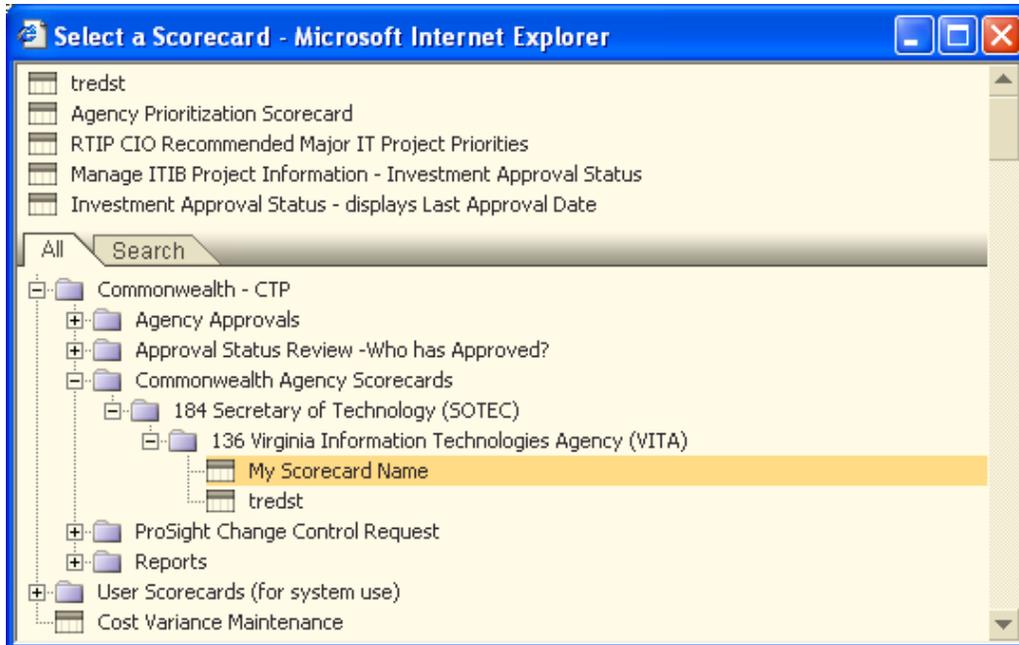
The first step is to navigate to the Scorecard portion of Primavera Portfolios. Please login to Primavera Portfolios and select the Scorecard tab as shown below.



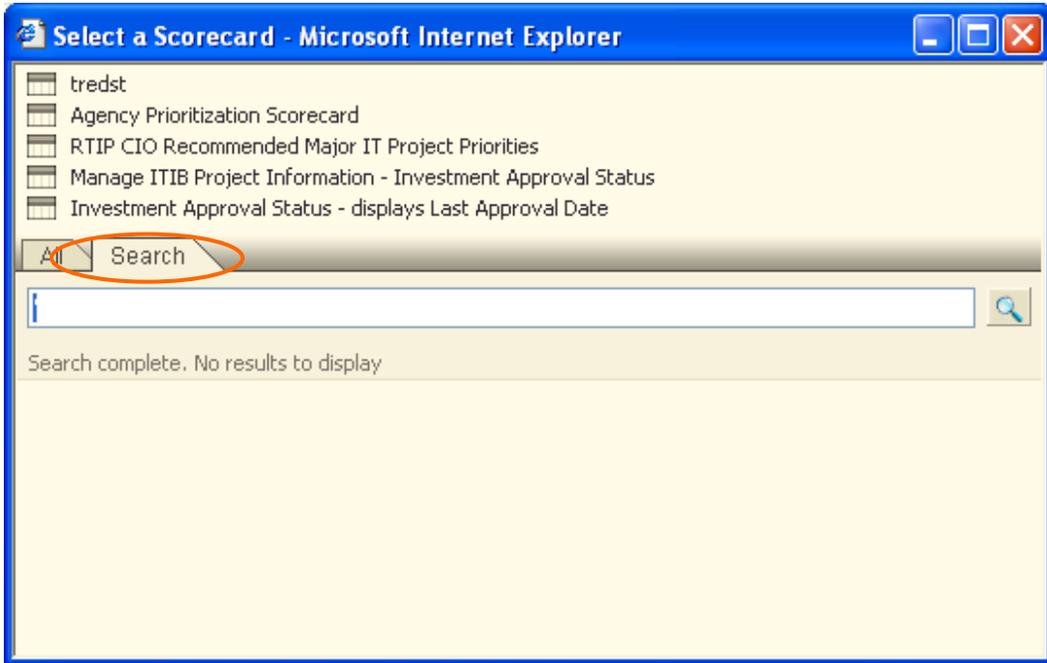
Now that the Scorecard module is the focus of our attention, we will go through the steps necessary to select a Scorecard for viewing purposes. Click the  button as shown below



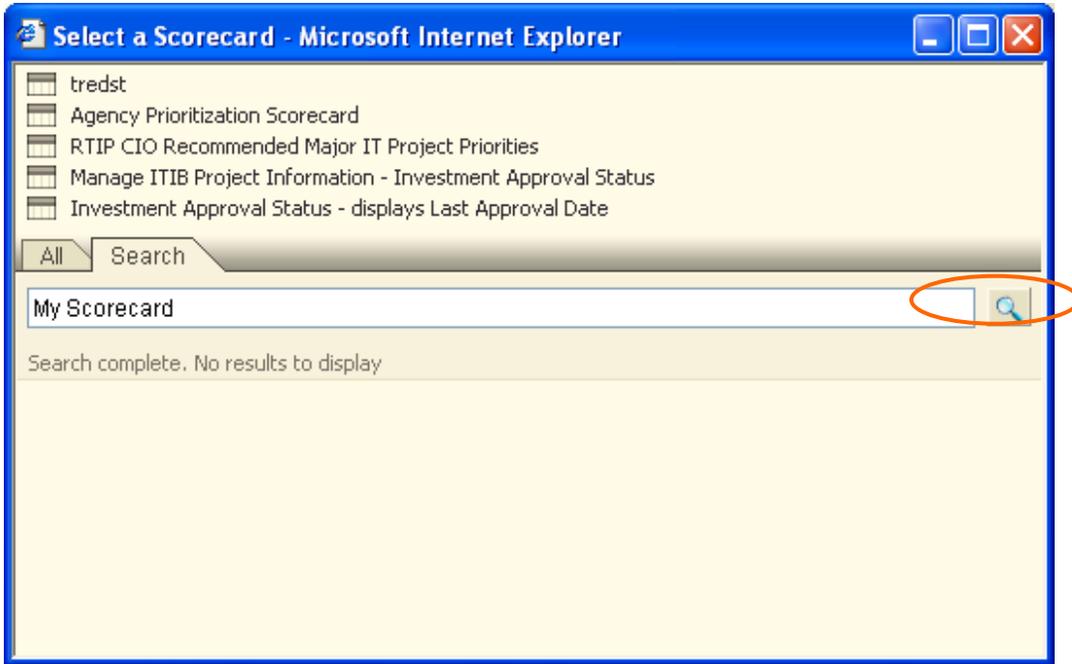
Next you will see a window allowing you to navigate to your agencies folder and locate the Scorecard you wish to view. To continue with our previous example, we have chosen the “My Scorecard Name” Scorecard as shown below.



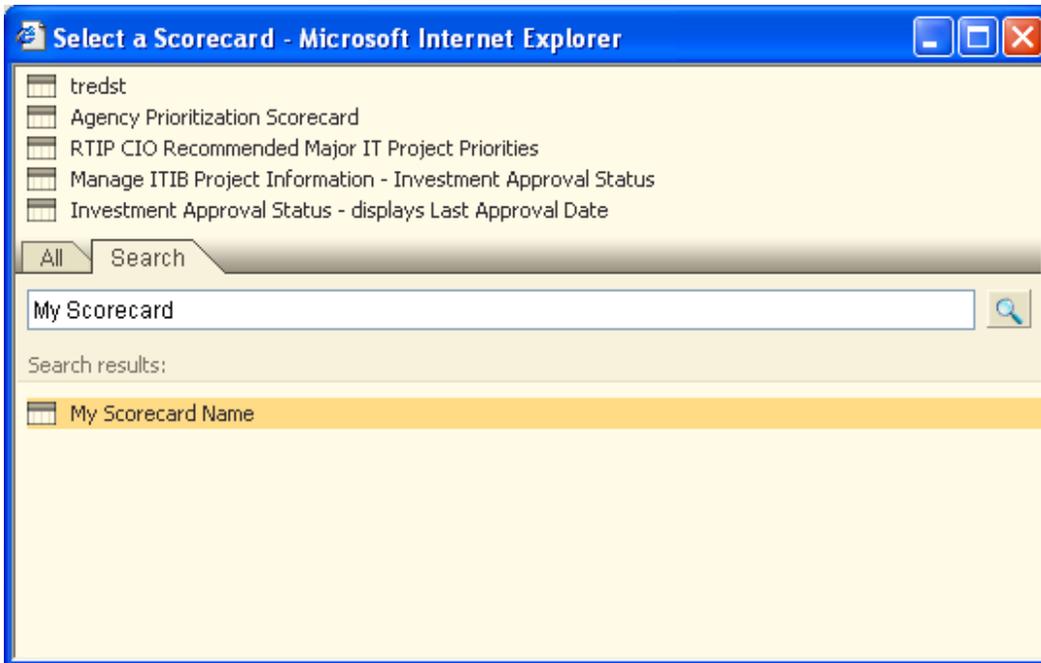
Still another way of locating the Scorecard you wish to view is to search for it using Primavera Portfolio’s search capability, to accomplish this click on the  tab as shown below.



Now type the name of the Scorecard you wish to locate. In our example we entered “My Scorecard” and clicked the  button as shown below.

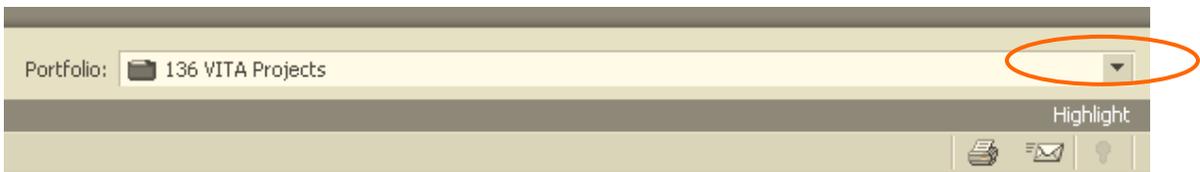


Then the results of the search are returned to us and we can select the desired Scorecard. In our case we selected the “My Scorecard Name” Scorecard.

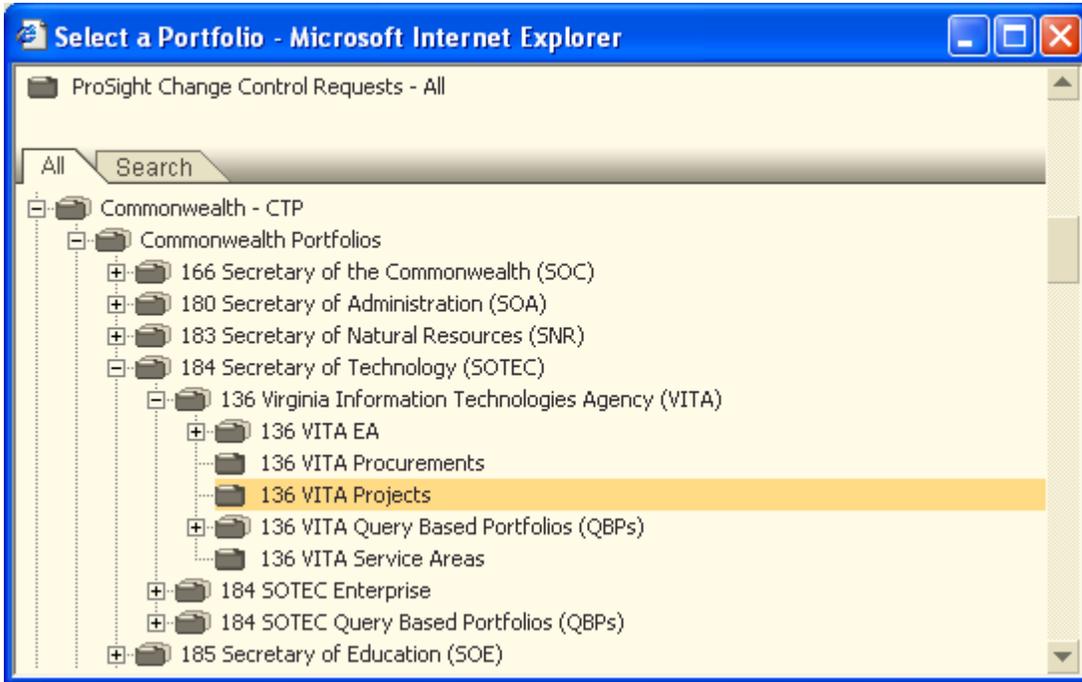


No matter which method you use you will have the My Scorecard Name Scorecard displayed in front of you. Now we have to select the data we wish to see. This is accomplished by selecting a portfolio containing; Projects, Procurements, or both. The next series of steps will walk you through that selection process.

To Select a Portfolio folder click the  button as shown below



Next you will see a window allowing you to select the portfolio folder you wish to see. In the example below we have chosen VITA's Project folder.



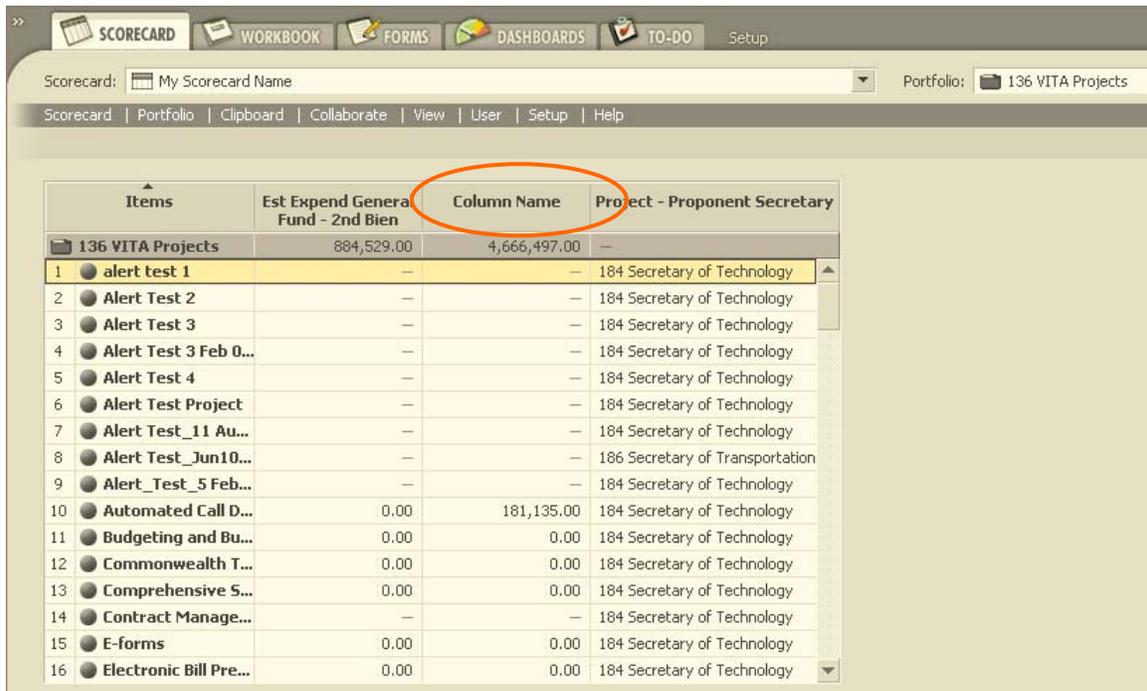
The figure below shows the accumulation of our efforts thus far. We've created a Scorecard, selected our Scorecard for viewing, and provided the data source for the information we would like to see. The data being displayed can also be sorted per user requests. Those steps will be covered next.

Items	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
136 VITA Projects	884,529.00	4,666,497.00	--
1 ● alert test 1	--	--	184 Secretary of Technology
2 ● Alert Test 2	--	--	184 Secretary of Technology
3 ● Alert Test 3	--	--	184 Secretary of Technology
4 ● Alert Test 3 Feb 0...	--	--	184 Secretary of Technology
5 ● Alert Test 4	--	--	184 Secretary of Technology
6 ● Alert Test Project	--	--	184 Secretary of Technology
7 ● Alert Test_11 Au...	--	--	184 Secretary of Technology
8 ● Alert Test_Jun10...	--	--	186 Secretary of Transportation
9 ● Alert_Test_5 Feb...	--	--	184 Secretary of Technology
10 ● Automated Call D...	0.00	181,135.00	184 Secretary of Technology
11 ● Budgeting and Bu...	0.00	0.00	184 Secretary of Technology
12 ● Commonwealth T...	0.00	0.00	184 Secretary of Technology
13 ● Comprehensive S...	0.00	0.00	184 Secretary of Technology
14 ● Contract Manage...	--	--	184 Secretary of Technology
15 ● E-forms	0.00	0.00	184 Secretary of Technology
16 ● Electronic Bill Pre...	0.00	0.00	184 Secretary of Technology

Scorecard Sorting

Now that we've created a Scorecard and are capable of using it to view data, we will cover the issues associated with sequencing the data. You can sort a Scorecard on a single or multiple columns and into ascending or descending order as required. This section is only meant to be an introduction and will focus on ascending and descending sequences.

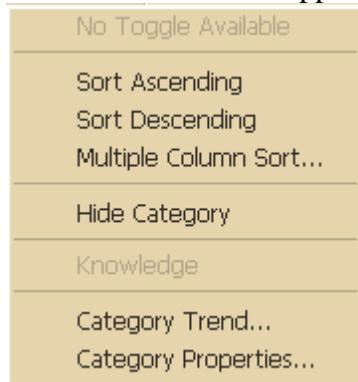
To Sort to an ascending order right click on the "Column Name" heading as shown below.



The screenshot shows a software interface with a scorecard table. The table has four columns: 'Items', 'Est Expend Genera Fund - 2nd Bien', 'Column Name', and 'Project - Proponent Secretary'. The 'Column Name' header is circled in orange. The table contains 16 rows of data, including 'alert test 1' through 'Electronic Bill Pre...'. The interface also shows a menu bar with 'Scorecard', 'Portfolio', 'Clipboard', 'Collaborate', 'View', 'User', 'Setup', and 'Help'. The 'Scorecard' menu is open, showing 'My Scorecard Name' and '136 VITA Projects'.

Items	Est Expend Genera Fund - 2nd Bien	Column Name	Project - Proponent Secretary
136 VITA Projects	884,529.00	4,666,497.00	--
1 ● alert test 1	--	--	184 Secretary of Technology
2 ● Alert Test 2	--	--	184 Secretary of Technology
3 ● Alert Test 3	--	--	184 Secretary of Technology
4 ● Alert Test 3 Feb 0...	--	--	184 Secretary of Technology
5 ● Alert Test 4	--	--	184 Secretary of Technology
6 ● Alert Test Project	--	--	184 Secretary of Technology
7 ● Alert Test_11 Au...	--	--	184 Secretary of Technology
8 ● Alert Test_Jun10...	--	--	186 Secretary of Transportation
9 ● Alert_Test_5 Feb...	--	--	184 Secretary of Technology
10 ● Automated Call D...	0.00	181,135.00	184 Secretary of Technology
11 ● Budgeting and Bu...	0.00	0.00	184 Secretary of Technology
12 ● Commonwealth T...	0.00	0.00	184 Secretary of Technology
13 ● Comprehensive S...	0.00	0.00	184 Secretary of Technology
14 ● Contract Manage...	--	--	184 Secretary of Technology
15 ● E-forms	0.00	0.00	184 Secretary of Technology
16 ● Electronic Bill Pre...	0.00	0.00	184 Secretary of Technology

The menu below will appear, please select (i.e. left click) **Sort Ascending**.



Please note the Scorecard has been resequenced and the sequence is noted in the column heading as shown below. Note the ▲ symbol is in the Column Heading column. This denotes the Scorecard is sorted in the ascending sequence

Items	Est Expend General Fund - 2nd Bien	Column Name ▲	Project - Proponent Secretary
136 VITA Projects	884,529.00	4,666,497.00	—
1 ● alert test 1	—	—	184 Secretary of Technology ▲
2 ● Alert Test 2	—	—	184 Secretary of Technology
3 ● Alert Test 3	—	—	184 Secretary of Technology
4 ● Alert Test 3 Feb 0...	—	—	184 Secretary of Technology
5 ● Alert Test 4	—	—	184 Secretary of Technology
6 ● Alert Test Project	—	—	184 Secretary of Technology
7 ● Alert Test_11 Au...	—	—	184 Secretary of Technology
8 ● Alert Test_Jun10...	—	—	186 Secretary of Transportation
9 ● Alert_Test_5 Feb...	—	—	184 Secretary of Technology
10 ● Contract Manage...	—	—	184 Secretary of Technology
11 ● Emergency Mana...	—	—	184 Secretary of Technology
12 ● Financials Upgrad...	—	—	184 Secretary of Technology
13 ● jim test	—	—	184 Secretary of Technology
14 ● Jims strategic pl...	—	—	—
15 ● PMD Alert Test 3 ...	—	—	184 Secretary of Technology
16 ● RTIPTesting_Apr...	—	—	—

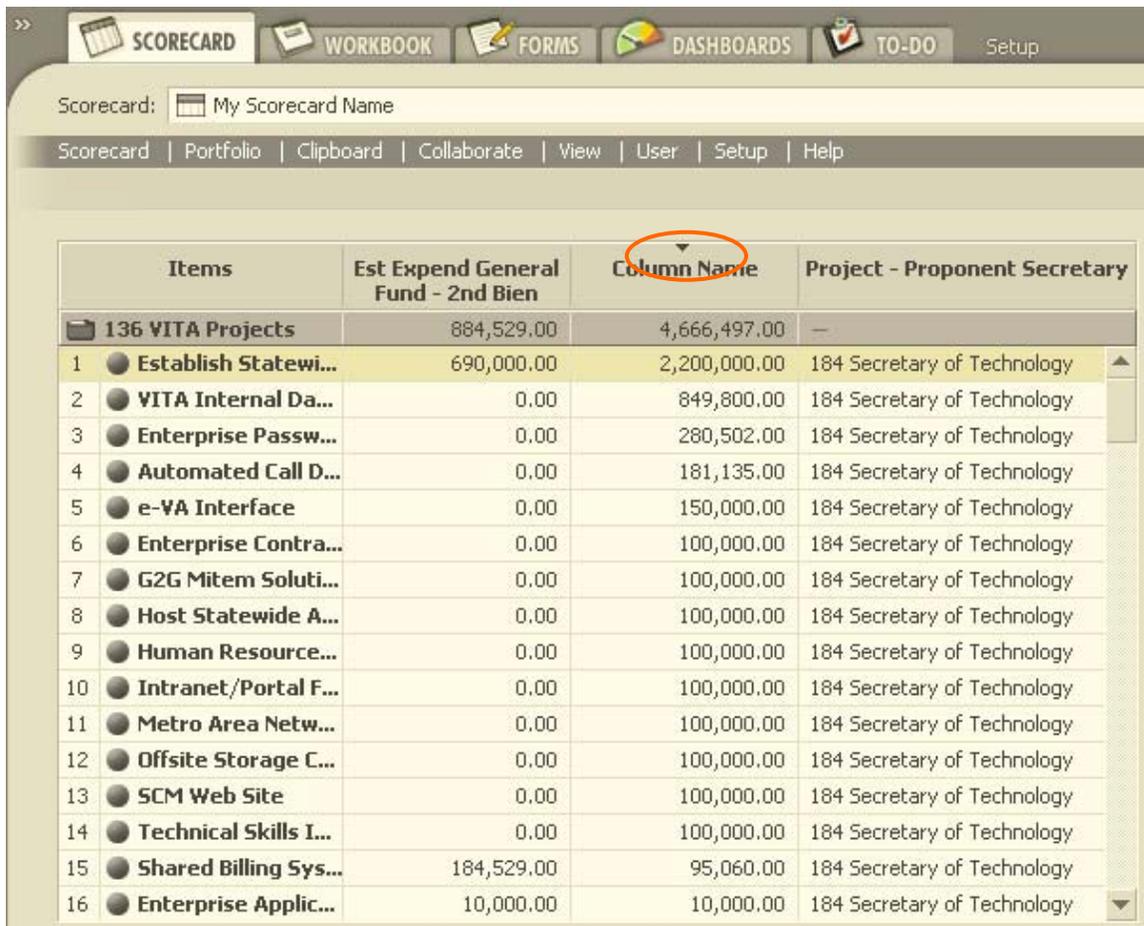
Now we will sort in descending order, please right click on the Column Name heading as shown below.

Items	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
136 VITA Projects	884,529.00	4,666,497.00	—
1 ● alert test 1	—	—	184 Secretary of Technology
2 ● Alert Test 2	—	—	184 Secretary of Technology
3 ● Alert Test 3	—	—	184 Secretary of Technology
4 ● Alert Test 3 Feb 0...	—	—	184 Secretary of Technology
5 ● Alert Test 4	—	—	184 Secretary of Technology
6 ● Alert Test Project	—	—	184 Secretary of Technology
7 ● Alert Test_11 Au...	—	—	184 Secretary of Technology
8 ● Alert Test_Jun10...	—	—	186 Secretary of Transportation
9 ● Alert_Test_5 Feb...	—	—	184 Secretary of Technology
10 ● Contract Manage...	—	—	184 Secretary of Technology
11 ● Emergency Mana...	—	—	184 Secretary of Technology
12 ● Financials Upgrad...	—	—	184 Secretary of Technology
13 ● jim test	—	—	184 Secretary of Technology
14 ● Jims strategic pl...	—	—	—
15 ● PMD Alert Test 3 ...	—	—	184 Secretary of Technology
16 ● RTIPTesting_Apr...	—	—	—

The menu below will appear, please select (i.e. left click) **Sort Descending**.

- No Toggle Available
- ✓ Sort Ascending
- Sort Descending**
- Multiple Column Sort...
- Hide Category
- Knowledge
- Category Trend...
- Category Properties...

Please note the Scorecard has been resequenced and the sequence is noted in the column heading as shown below. Note the  symbol is in the Column Heading column. This denotes the Scorecard is sorted in the descending sequence



Items	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
136 VITA Projects	884,529.00	4,666,497.00	—
1 ● Establish Statewi...	690,000.00	2,200,000.00	184 Secretary of Technology
2 ● VITA Internal Da...	0.00	849,800.00	184 Secretary of Technology
3 ● Enterprise Passw...	0.00	280,502.00	184 Secretary of Technology
4 ● Automated Call D...	0.00	181,135.00	184 Secretary of Technology
5 ● e-VA Interface	0.00	150,000.00	184 Secretary of Technology
6 ● Enterprise Contra...	0.00	100,000.00	184 Secretary of Technology
7 ● G2G Mitem Soluti...	0.00	100,000.00	184 Secretary of Technology
8 ● Host Statewide A...	0.00	100,000.00	184 Secretary of Technology
9 ● Human Resource...	0.00	100,000.00	184 Secretary of Technology
10 ● Intranet/Portal F...	0.00	100,000.00	184 Secretary of Technology
11 ● Metro Area Netw...	0.00	100,000.00	184 Secretary of Technology
12 ● Offsite Storage C...	0.00	100,000.00	184 Secretary of Technology
13 ● SCM Web Site	0.00	100,000.00	184 Secretary of Technology
14 ● Technical Skills I...	0.00	100,000.00	184 Secretary of Technology
15 ● Shared Billing Sys...	184,529.00	95,060.00	184 Secretary of Technology
16 ● Enterprise Applic...	10,000.00	10,000.00	184 Secretary of Technology

That concludes our introduction to Scorecard sorting. Primavera Portfolios also has the ability to sort on multiple columns, but as this document concentrates on Scorecard creation the line had to be drawn somewhere. One final note on sorting, it is meant to be a quick answer to a user's request, not a permanent configuration change. To that end, any sorting choices made will be 'forgotten' when the user has gleaned the necessary information and moves on. In this way, multiple users can use the same Scorecard for their own individual efforts and not impact other users of the same Scorecard.

Wrap Up

This document has covered the steps necessary to Create, View, and Sort a Scorecard using mechanism available to the AITR user. As you can see, it's not as intimidating as one might think. I hope you found it useful and the information gained can be used as a starting point for your Scorecard construction efforts.

Scorecard Creation Appendix

This document is focused on the creation and usage of Scorecards. But there is a side discussion concerning how the user will identify those categories they wish to include in a Scorecard. The categories of most interest to users appear in forms. Those same forms you use when you enter information about the Project or Procurement. It is possible to interrogate the different parts of a form to determine the name of a particular category that is the focus of our attention. Once we have the name you can search for, and include, it in your Scorecard.

To identify a particular category first open a form. In our example we will use the Project Status Report. Please note the focus of our efforts during this example will be the Proponent Secretary category.



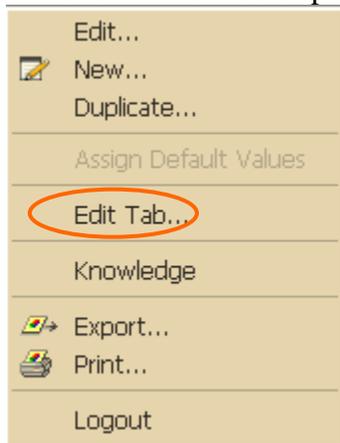
The screenshot displays a software interface with a top navigation bar containing icons and labels for SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO. Below the navigation bar, a dropdown menu shows 'Form: Project Status'. A secondary menu lists options: Form | Item | Clipboard | Collaborate | View | User | Setup | Help. The main content area features a tabbed interface with 'SUMMARY' selected, and other tabs for 'PROJECT BACKGRD...', 'MEASURES OF SUCC...', and 'PLANNED & ACTUA...'. Under the 'Project Information' section, the following fields are visible:

*Working Title:	E-forms
*Item Classification:	Non-Major
*Proponent Secretary:	184 Secretary of Technology
*Proponent Agency:	136 Virginia Information Technologies Agency

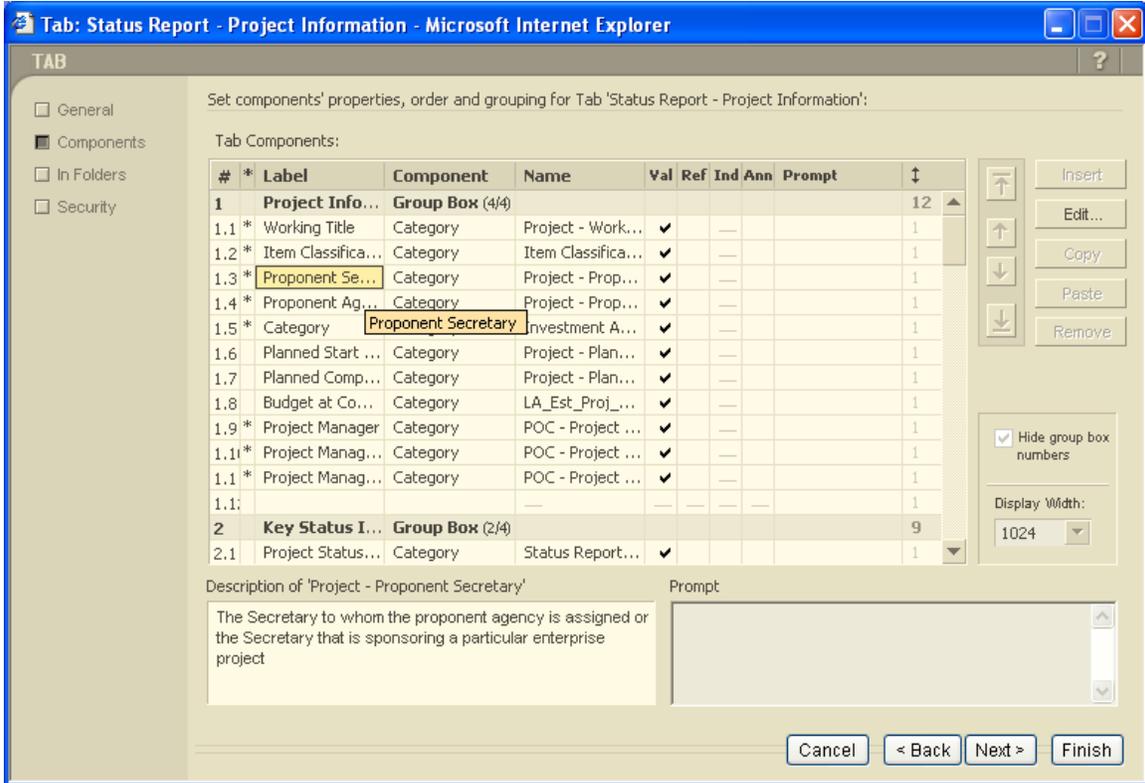
If you would please notice, we are looking specifically at the Summary tab of the Project Status form. Click on the Form menu as shown below.



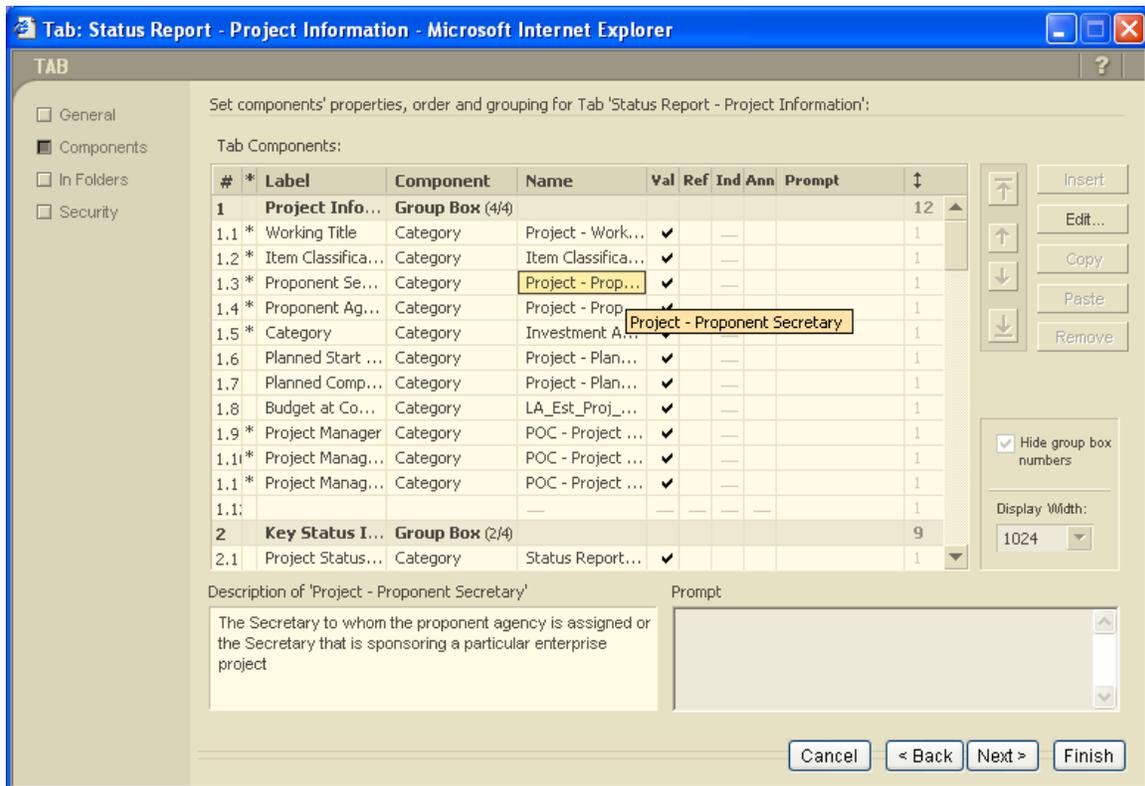
A menu will now be displayed, please select the **Edit Tab...** option as shown below.



Now you will see a window that displays the components of the summary tab. Please note the highlighted entry; this is the Proponent Secretary entry we were talking about before.



Now, if we highlight a different column we will see the associated category name, as shown below. At this point we can copy the category name and, later, search for it, for inclusion in our Scorecard.



One final note, it is possible to have both the Tab wizard and the Scorecard wizard open at the same time. This should facilitate the categories inclusion in the Scorecard because you can use the copy buffer in Windows to hold the category name.