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 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”

![Scorecard creation interface]

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 Next > 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 OK 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 \[\text{up} \] and \[\text{up} \] 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 \[\text{up} \] button.
Description of Est Exp General Fund - 2nd Bien

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

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

![Scorecard Image]

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 your 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 Search tab as shown below.
Search complete. No results to display.
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.
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 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.

<table>
<thead>
<tr>
<th>Items</th>
<th>Est Expend General Fund - 2nd Bien</th>
<th>Column Name</th>
<th>Project - Proponent Secretary</th>
</tr>
</thead>
<tbody>
<tr>
<td>136 VITA Projects</td>
<td>884,529.00</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>1 alert test 1</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>2 Alert Test 2</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>3 Alert Test 3</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>4 Alert Test 3 Feb 0...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>5 Alert Test 4</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>6 Alert Test Project</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>7 Alert Test_11 Au...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>8 Alert Test_Jun10...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Transportation</td>
</tr>
<tr>
<td>9 Alert_Test_5Feb...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>10 Contract Manage...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>11 Emergency Mana...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>12 Financials Upgrad...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>13 Jim test</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>14 Jims strategic pl...</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
<tr>
<td>15 PMD Alert Test 3 ...</td>
<td>—</td>
<td>—</td>
<td>184 Secretary of Technology</td>
</tr>
<tr>
<td>16 RTIPTesting_Apr...</td>
<td>—</td>
<td>—</td>
<td>—</td>
</tr>
</tbody>
</table>
Now we will sort in descending order, please right click on the Column Name heading as shown below.

![Image showing the scorecard and the menu with the Column Name highlighted.]  

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

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.

![Image of a form with Project Status Report selected and filled out with data]

- Working Title: E-forms
- Item Classification: Ncn-Major
- Proponent Secretary: 184 Secretary of Technology
- Proponent Agency: 135 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.