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**Primavera Portfolio Management 9.0 SP2**

**Commonwealth of Virginia**

# General Training Guide

For Commonwealth Technology Portfolio (CTP) Users

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## **Primavera Portfolio Management 9.0 SP2**

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## Section 1: Primavera Portfolio Management Basics

### How to Request Access to the Commonwealth Technology Portfolio (CTP):

The Commonwealth Technology Portfolio Tool (CTP) is a secured website that uses single sign-on authentication using the COV domain login id and password to provide access to the tool. To request access, please follow the steps below:

1. If you already possess a COV account, contact VCCC for a ticket; request access to the Commonwealth Technology Portfolio, and ask that the ticket be assigned to VITA-CTP PROSIGHT APPL BUSINESS (PMD) to validate business need for access.

If you do not have a COV account, contact VCCC for a ticket; request a COV account be created with access to the Commonwealth Technology Portfolio, and ask that the ticket is assigned first to VITA-CTP PROSIGHT APPL BUSINESS (PMD) to validate business need for access. VCCC will provide additional instructions on how to request a COV domain account.

Note: New users must have completed CTP training or have scheduled training prior to access being granted to the tool. Training information can be found at: <http://www.vita.virginia.gov/oversight/projects/>.

2. PMD will contact the user and Agency IT Resource (AITR) to validate business need and access roles and responsibilities. If the business need is valid, VITA-CTP PROSIGHT APPL BUSINESS (PMD) will reassign the ticket to the IT Partnership (ITP) to create the COV account and/or add user's COV account to the COV domain "ProSight User's Group."
3. The ITP will complete actions, and reassign the ticket back to VITA-CTP PROSIGHT APPL BUSINESS (PMD) with the user's login ID information.
4. VITA-CTP PROSIGHT APPL BUSINESS (PMD) will then create a user account in the CTP application.
5. PMD will notify the user by email, of account creation, role/responsibilities within CTP, and instructions on how to login. The VCCC ticket will then be closed.
6. Once CTP access is granted, COV passwords can be managed through eSupport.

As a reminder -- all COV domain account holders must change their COV passwords every 90 days. An email reminder is sent automatically by the ITP to warn of pending password expiration. You can change your COV password using the online P-Synch tool by performing the following steps:

1. Go to <https://esupport.virginia.gov>
2. Click on the “Change your Password” option under “COV Network Password.”
3. Enter your email address (Firstname.Lastname@Agencyacronym.virginia.gov) for your login ID.
4. Begin the registration process. Once registered you can use eSupport to change your password or unlock your account.

### **How to Access the CTP:**

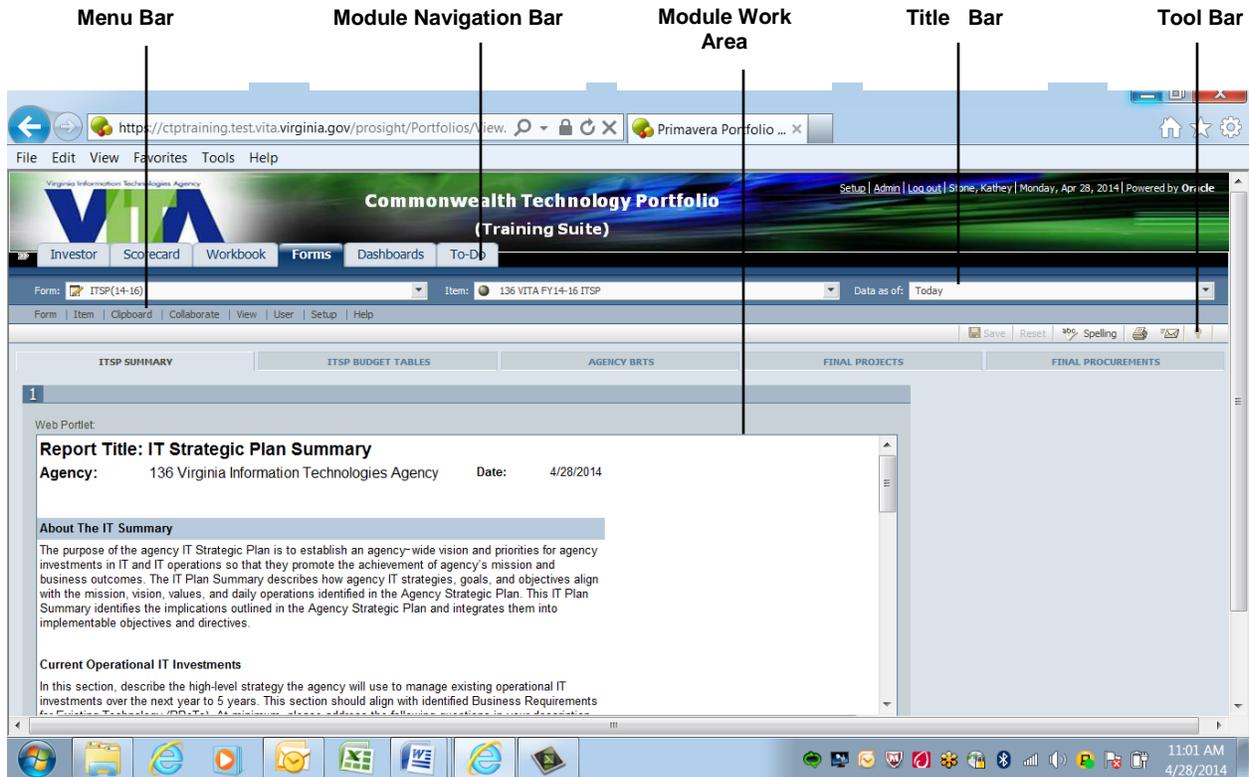
The URL is <https://ctp.vita.virginia.gov/prosight/>

Add this link to your Favorites menu or a shortcut icon on your desktop.

## The Main Screen

When you log on to Primavera Portfolio Management, 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.



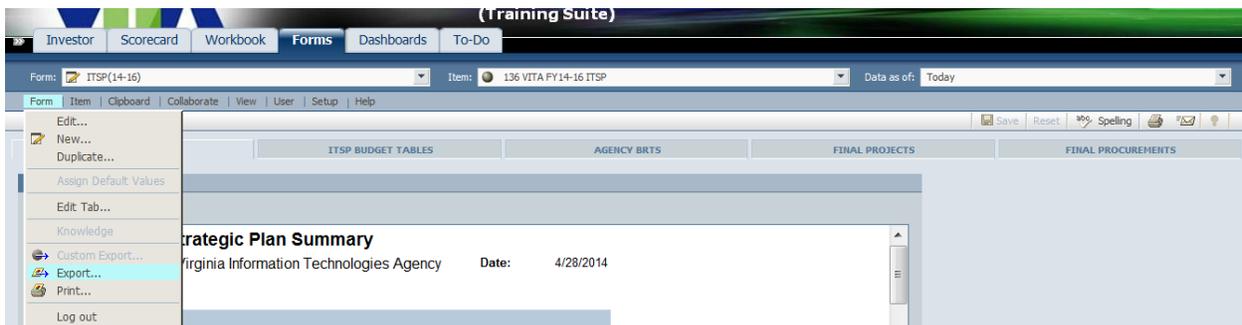
## The Menu Bar

The Menu Bar is the horizontal medium blue line running left to right across the top half of the browser window. 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 Primavera Portfolio Management 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**. Once the Export option is selected, choose Open or Save to save the exported file.

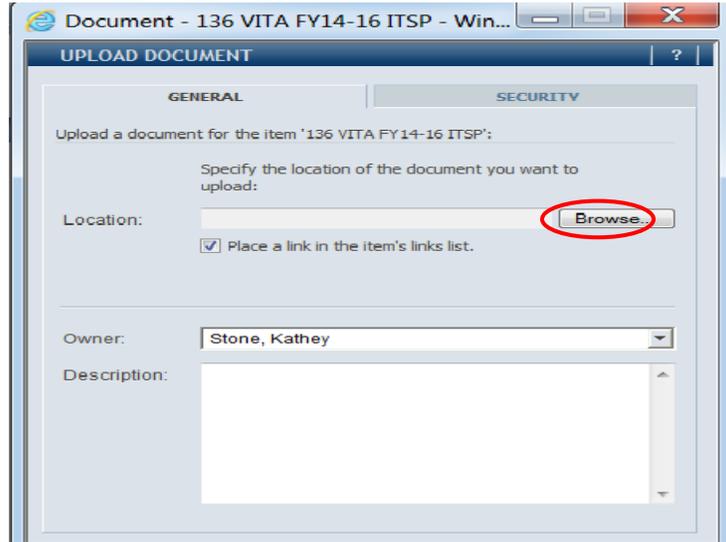


## Upload Documents:

To attach a document to a form or to add additional details for justification, choose **Item → Upload Document** to upload the document to the server.

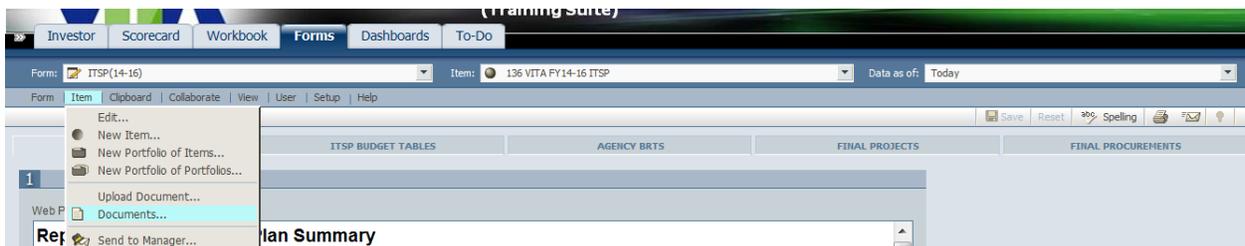


Click **Browse** to identify the documents to be uploaded. Click Ok once document is selected.

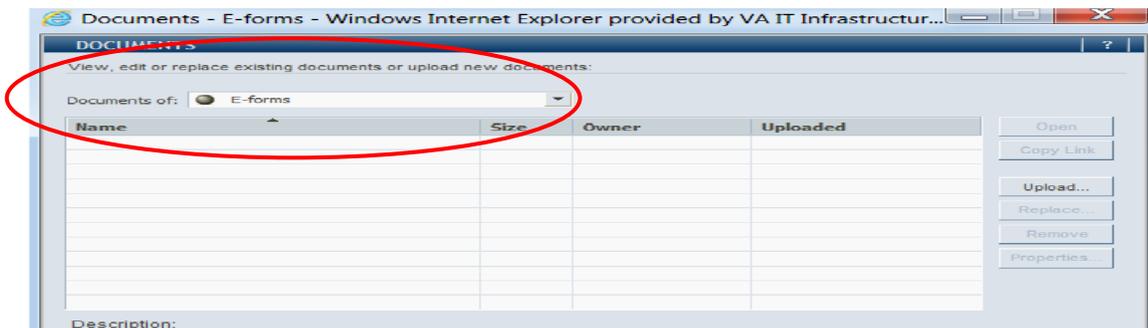


### View All Uploaded Documents

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



The option opens the window below and allows the user to open, upload, etc. specific documents created externally but associated with the item.



## E-mail

To send an email containing the URL of the present Form, Tab and Item to any active user or user group in the CTP application, choose 'Collaborate' on the menu bar, click Send Page, and select the user. The Collaborate option will also allow you to obtain the page address of the present Form, Tab or Item displayed on the screen.

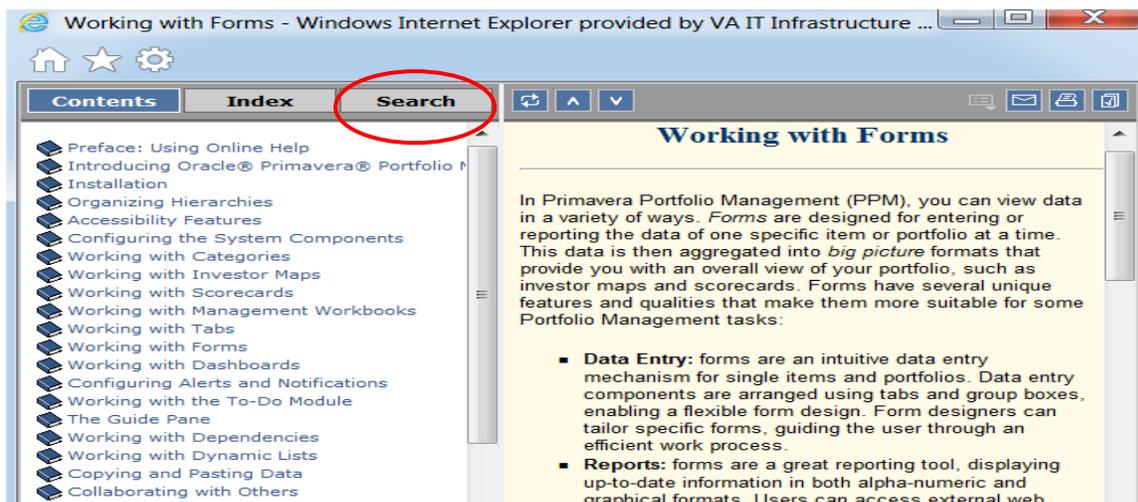


## Help Function

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



A screen appears to allow you to search a topic.



## The Module Navigation Bar



The module navigation bar allows users to select a module. To open a module, click the icon on that Navigation bar. The browser window displays the new module. The Module segments are summarized below:

- **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 user to enter business case data for projects, procurements, BRT or OR/I.
- **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.

## Module Work Area

The Module Work Area is the content of the module the user selected and contains the project, procurement, BRT or OR/I information configured for that module. Below is an example of a Scorecard work area.

Items	OR/I Type	Submitted by	OR/I Submission Date	Agency	Agency OR/I Priority	OR/I Due Date	OR/I Discussion with VITA CAM	AITR Notification Date
136 VITA Projects		Administrator, System						
1 Application XYZ		Scott, Constance		136 Virginia Information Tech...				
2 Automated Call D...		Administrator, System		108 Secretary of Human and ...				
3 Budgeting and Bu...		Administrator, System		136 Virginia Information Tech...				
4 CBA Demos		Administrator, System		136 Virginia Information Tech...				
5 Commonwealth T...		136AITRn1, 136		136 Virginia Information Tech...				

## 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.

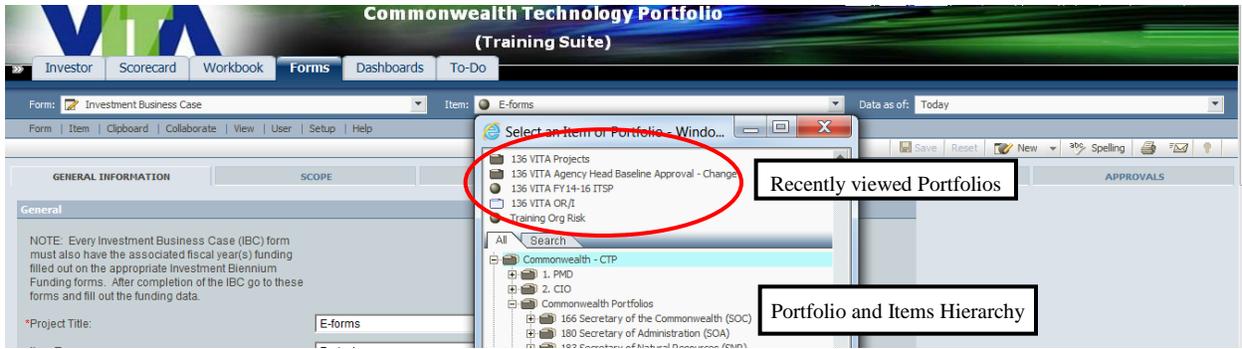


The drop down menu appears.

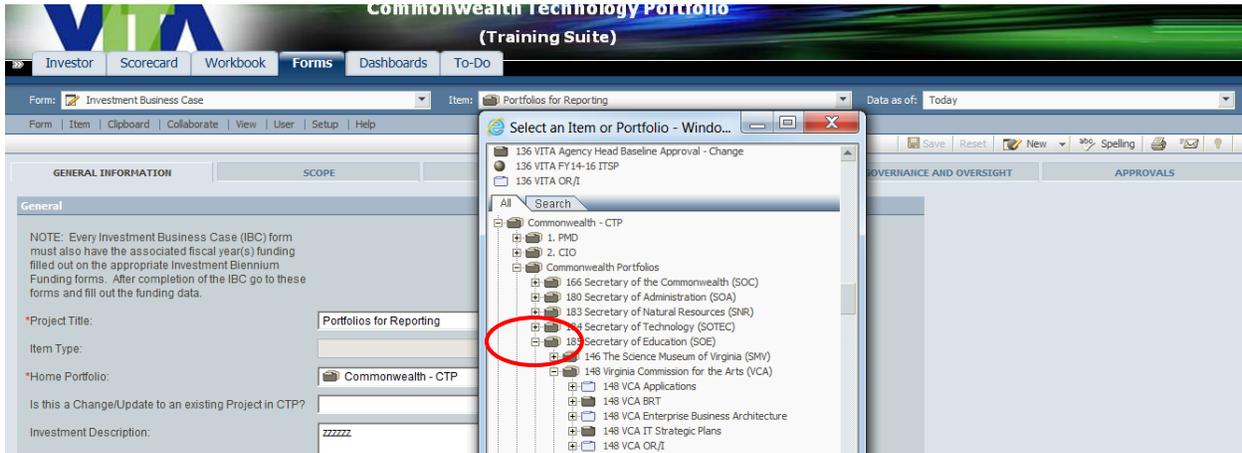


To get to the actual data, the user must choose which portfolio and Item to open. The Title Bar allows the user to choose which portfolio to open and to select the appropriate data (item). Remember, the data format that will appear is determined by the module previously selected on the left hand side 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.



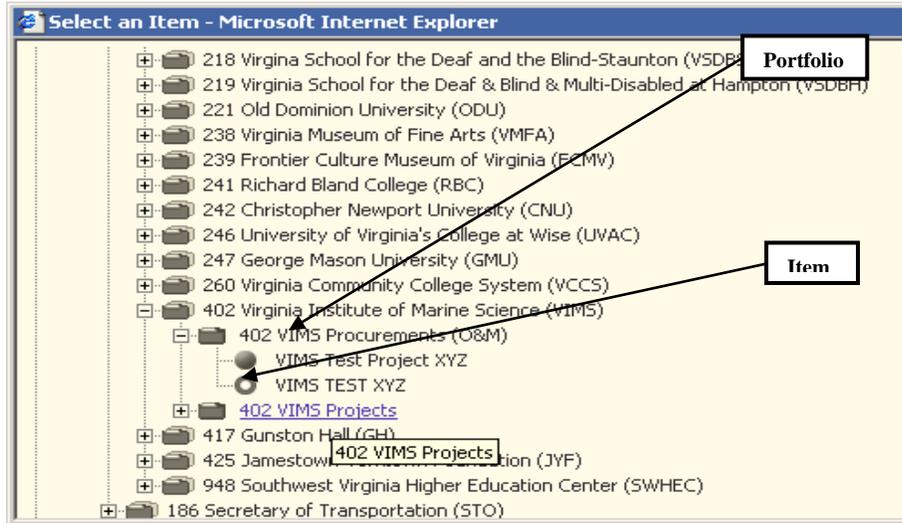


Click on the '+' to expand each PORTFOLIO until you find your project, procurement, BRT or OR/I and highlight the object. If you have permission to view that object, it becomes the active object on all forms you view.

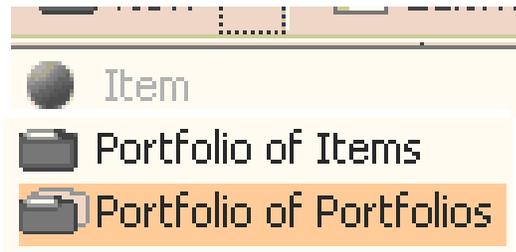


## PORTFOLIO AND ITEM ORGANIZATION

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



### Portfolio Legend:

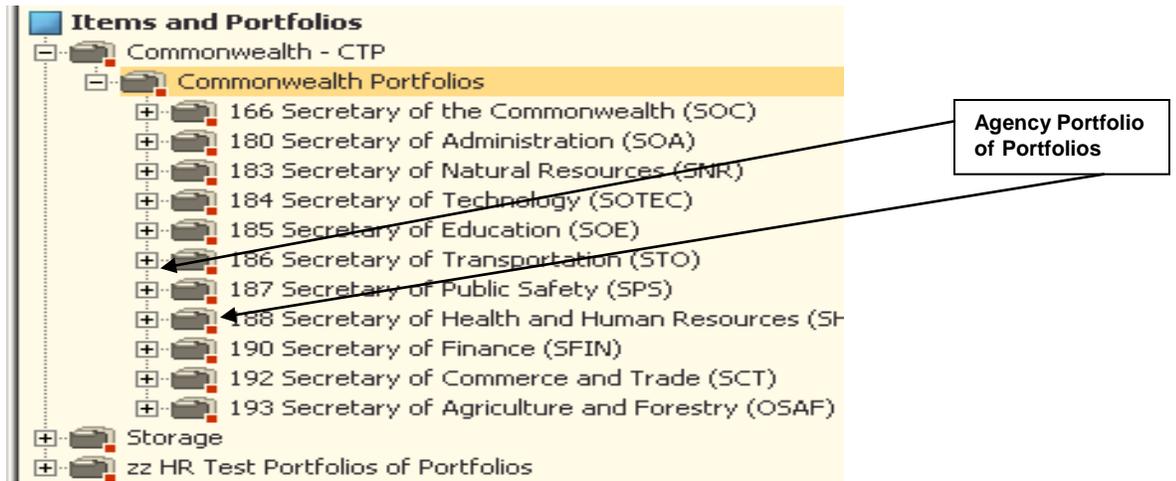


**Portfolio of Portfolios:** Highest Hierarchy or “Parent” indicated by a dark and shaded double folder. It contains several portfolios.

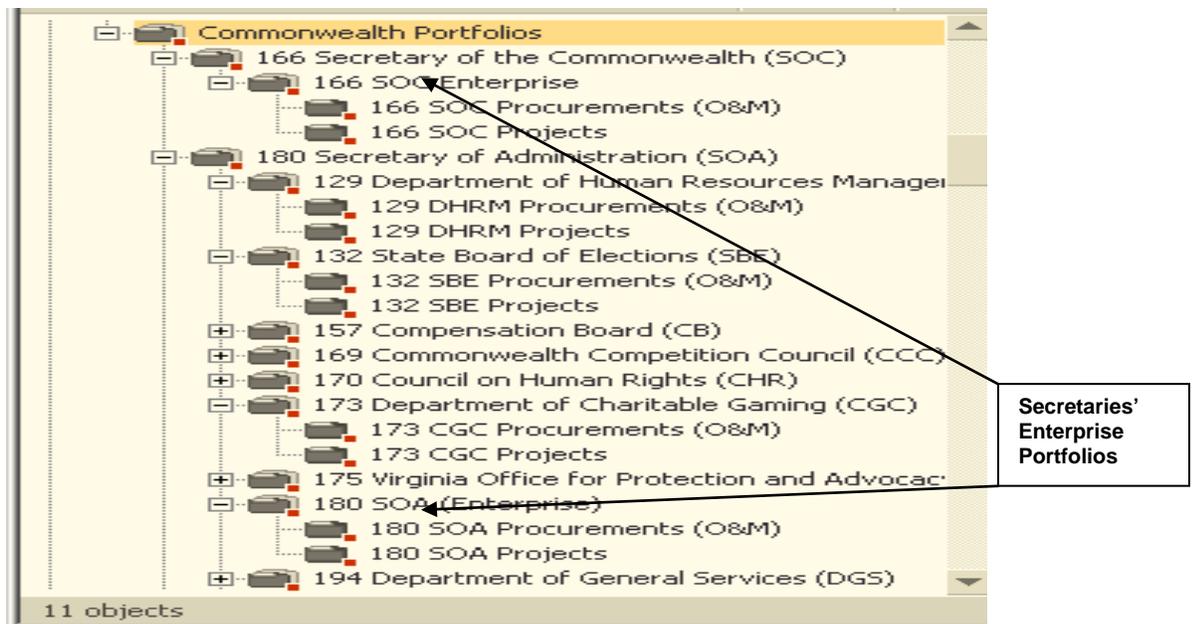
**Portfolio Items:** “Child” hierarchical relationship to Parent portfolio. Contains individual items; indicated by dark single folder.

**Items:** Projects, Procurements, BRTS, OR/Is, Applications, etc.

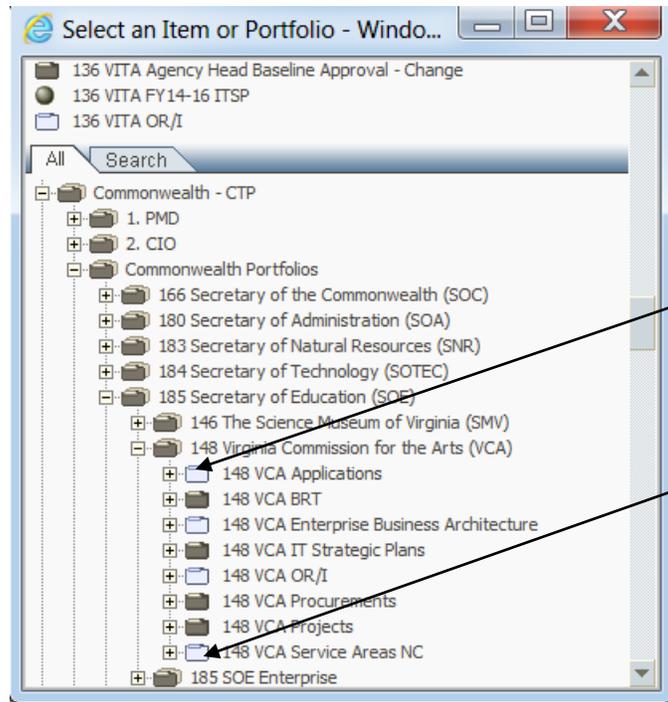
The *CTP Portfolios* are organized by Secretaries as *Portfolio of Portfolios*.



Each Secretary has all associated agencies and a *Portfolio of Items* for enterprise assets.



Each agency has Portfolios grouped by item types. An Item can be a Project, Procurement, BRT, OR/I, or Service Area. New Items are added to the applicable Portfolio.



**Portfolio of Items: Applications, BRTS, EBA, Strategic Plans, OR/Is, Procurements, Projects and Service Areas**

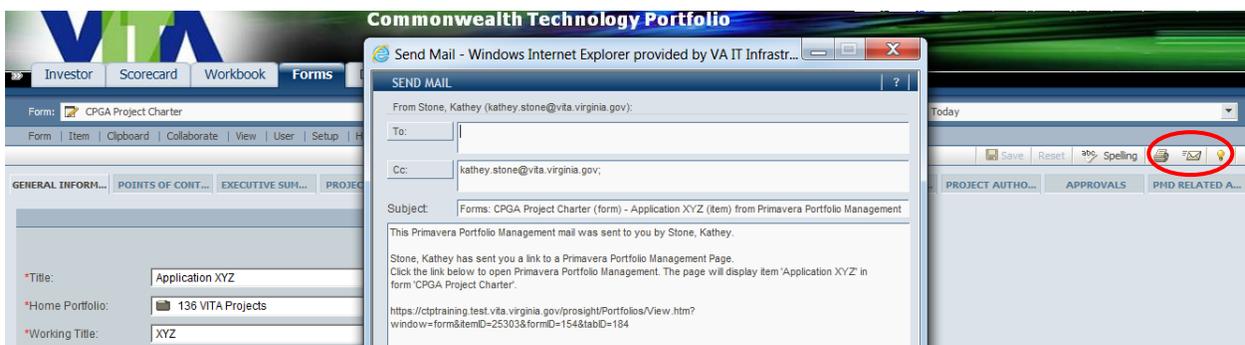
## The Tool Bar

The toolbar allows you to Reset, Spell Check, Print, Email and Request information.



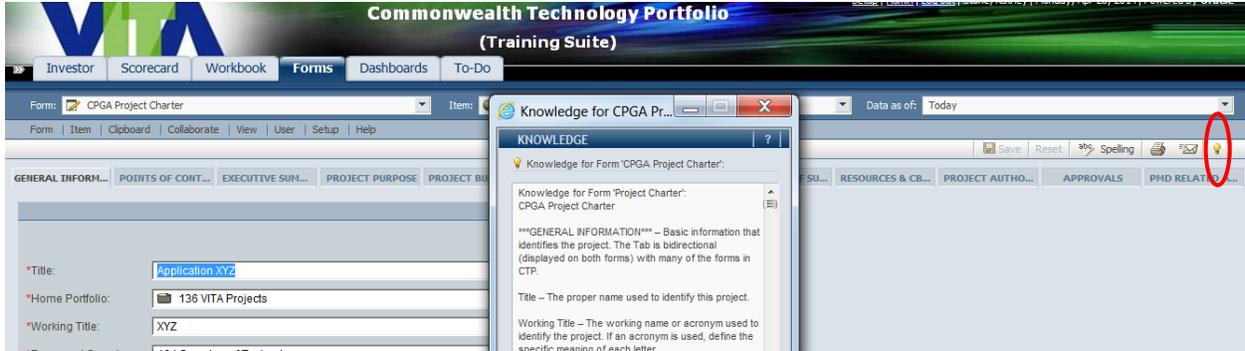
- **Submit** – This feature is not currently active.
- **Reset** – This feature is not currently active.
- **Spelling** – All spell checking should be done in Word. This feature is not working properly.
- **Print** – This key allows the user to print the current form and its content. It does not print the document exactly, but opens up an html report in a new window, and then opens up a printer selection window. You could continue to print the report or cancel. You may also 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].
- **Send Page** – This key will allow you to email a URL link of the current form, tab and item to another Primavera Portfolio Management user. The email address used is based on the user address that is set up in Primavera Portfolio Management. This capability greatly simplifies the steps necessary to communicate with another user about a specific piece of information.
- **Knowledge** – This option allows the user to view information helpful to the usage of the page.

To **Email** a link to a current Primavera Portfolio Management user, choose the Send Page button.



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

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



## Section 2: Forms

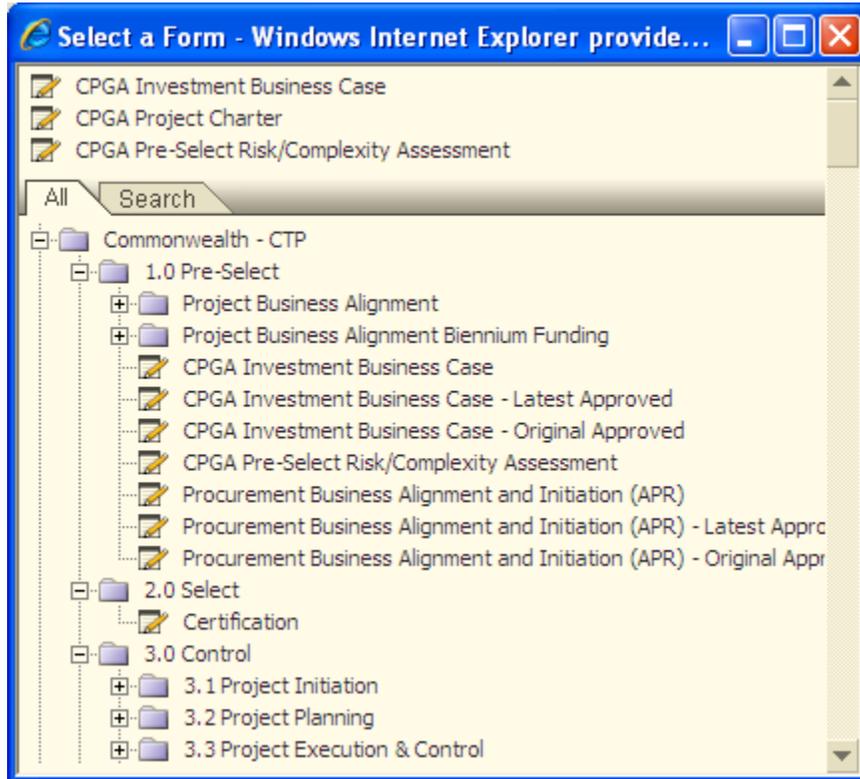
Forms are the primary method of entering data. To access Forms, ensure the Forms tab is selected at the very top of the Primavera Portfolio Management screen.



Users can select a form by two methods: the Forms Tab and “Processes.” The Forms Tab allows you to use the pull down menu on the right side to first select the *Item*, then select the **Form** from the left side at the top of the Primavera Portfolio Management screen. It will display a menu. Click on the ‘+’ to expand various folders until you find the form you desire. Highlight the form. If you have permission to view that form, the form will open and display the item you may have selected.



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 on the desired Tab.



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.

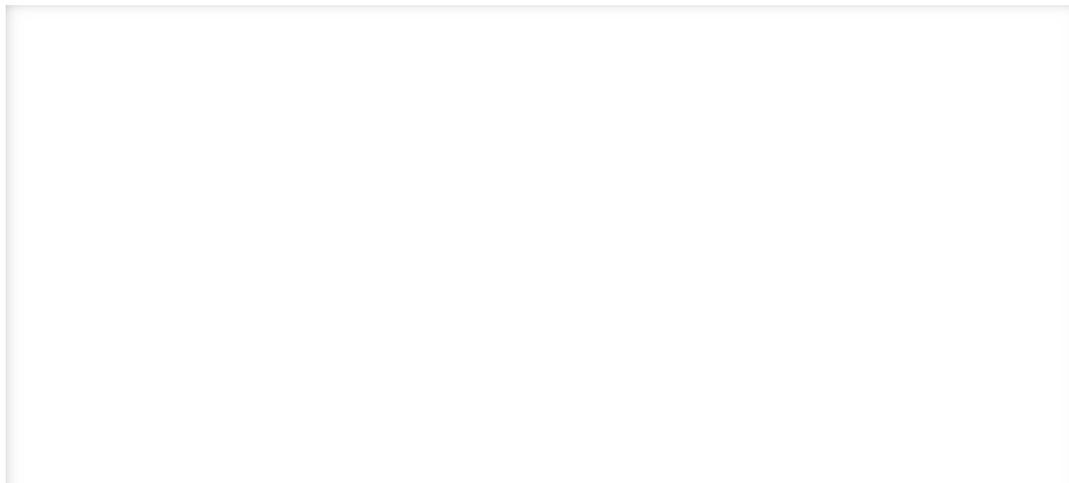
The Primavera Portfolio Management back end is a Microsoft SQL server database and the forms provide access to data in the database.

Some fields have a pull-down menu arrow allowing you to choose values. Other fields allow you to type in your entry. If the field is colored rather than white, this means either the value is calculated or you have read only access to the data. 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. Note the menu arrow for that field.

The screenshot shows a web-based form interface. At the top, there are navigation tabs: 'Form: Project or Procurement Determination', 'Item: 136 VITA FY14-16 ITSP', and 'Data as of: Today'. Below this is a menu bar with options: 'Form', 'Item', 'Clipboard', 'Collaborate', 'View', 'User', 'Setup', 'Help'. On the right side of the menu bar are icons for 'Save', 'Reset', 'Spelling', and a help icon. The main content area is titled 'PROJECT OR PROCUREMENT?' and is divided into two sections. The first section, 'General Information', contains several fields: '\*BRT Name:' with the value '136 VITA FY14-16 ITSP', '\*Home Portfolio:' with a dropdown menu showing '136 VITA IT Strategic Plans', 'Secretariat:' with the value '184 Secretary of Technology', and 'Agency:' with the value '136 Virginia Information Technologies Agency'. The second section, 'Project or Procurement?', contains a heading 'Answer these questions to determine if your BRT will be best fulfilled by a (stand-alone) Procurement, or a Project.' followed by two numbered questions. Question 1 is '1. Is the effort a temporary endeavor with defined start and end dates, and results in a product, service, or result that requires IT staff to manage? If yes, it is a project.' and has a dropdown menu with 'Yes' and 'No' options. Question 2 is '2. Will the effort result in new or increased functionality in an existing IT system? If yes, it is a project.' and also has a dropdown menu with 'Yes' and 'No' options.

To select a value from the pull down menu, you must click the value you wish to select. -If the field is calculated or you only have read access to the field, then when you click it will become shaded.

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



## *Fields You Can't Edit...*

### ACCESSING FORMS: 'PROCESSES'

The other method of selecting a form is to use 'Processes.' The 'Processes' feature of Primavera Portfolio Management allows the creation of step-by-step procedures. In the CTP, **ITIM Pre-Select, Select, Control, and Evaluation Phases** are the processes that you will use to manage the IT investments as portfolios.

To open the 'Processes' frame, click on the double arrow '>>' at the far left at the top of the Primavera Portfolio Management screen as shown 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 screenshot displays the Primavera Portfolio Management interface. At the top, the header reads "Commonwealth Technology Portfolio (Training Suite)". Below this is a navigation bar with tabs for "Processes", "Workflows", "Investor", "Scorecard", "Workbook", "Forms", "Dashboards", and "To-Do". The "Processes" tab is active, and a sub-tab "1.0 Pre-Select Phase (BRT)" is selected. The main content area shows a form titled "PROJECT OR PROCUREMENT?" with a "General Information" section. The form fields include: "BRT Name" (136 VITA FY14-16 ITSP), "Home Portfolio" (136 VITA IT Strategic Plans), "Secretariat" (184 Secretary of Technology), and "Agency" (136 Virginia Information Technologies Agency). A callout box with a black border and white background points to the double arrow ">>" button at the top left of the form area, containing the text "Click here to Show/Hide Processes".

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



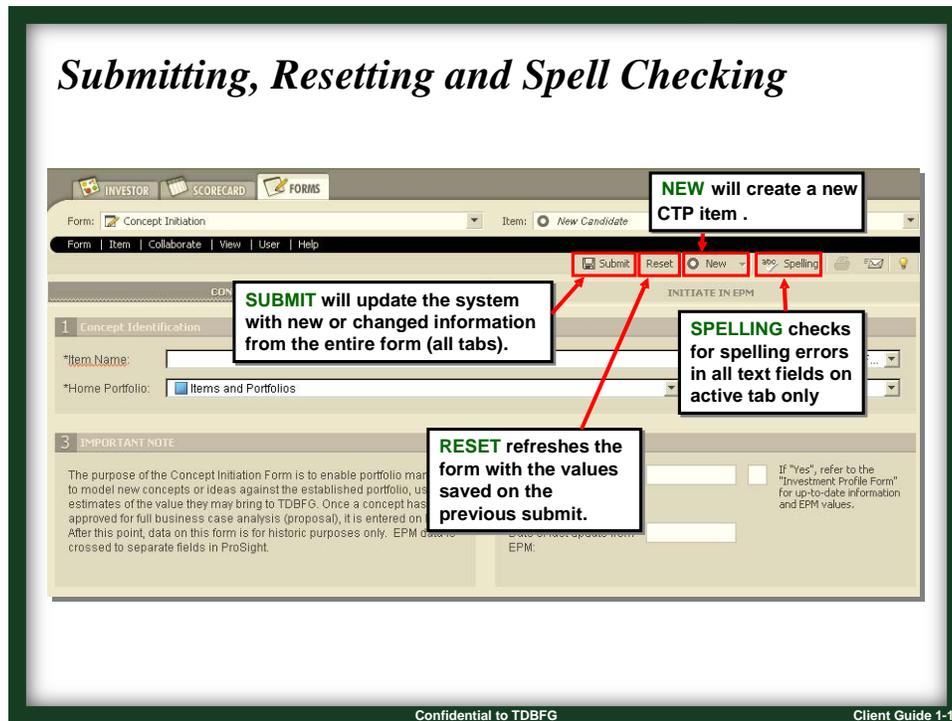
The text of the processes appears with any associated links or documents to assist you within that respective module.



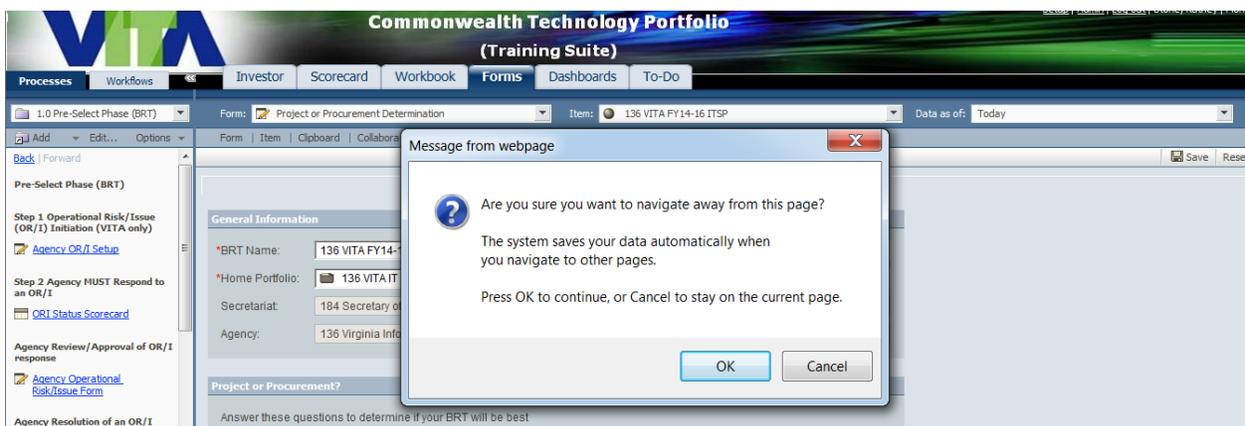
**NOTE:** In 'Processes', multiple links to the same form may exist, but the links will go to different tabs based on the form selection.

## SAVE, RESET AND SPELL CHECKING FORMS

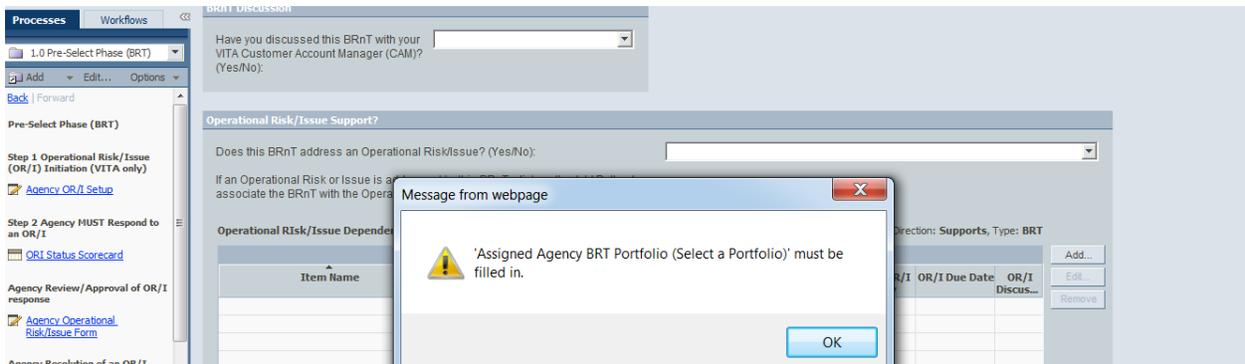
Saving a Form: To submit or save a form, click on the *Save* tab.



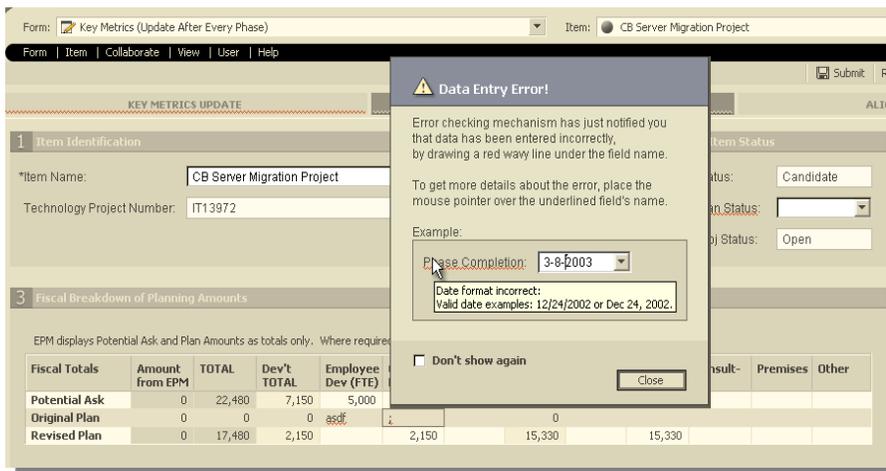
- The “*Automatic Save*” window below will appear when you attempt to navigate away from a form in which data has been changed without submitting.
- “*OK*” will automatically submit any data you have changed or entered and you will navigate to the new form or module you requested.
- “*CANCEL*” returns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



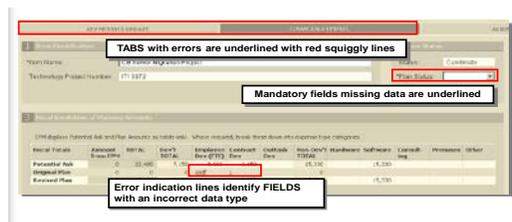
- The “*Fill in*” window will appear when a form is submitted with mandatory data missing.
- “*OK*” returns you to the form to update the mandatory data before submitting.



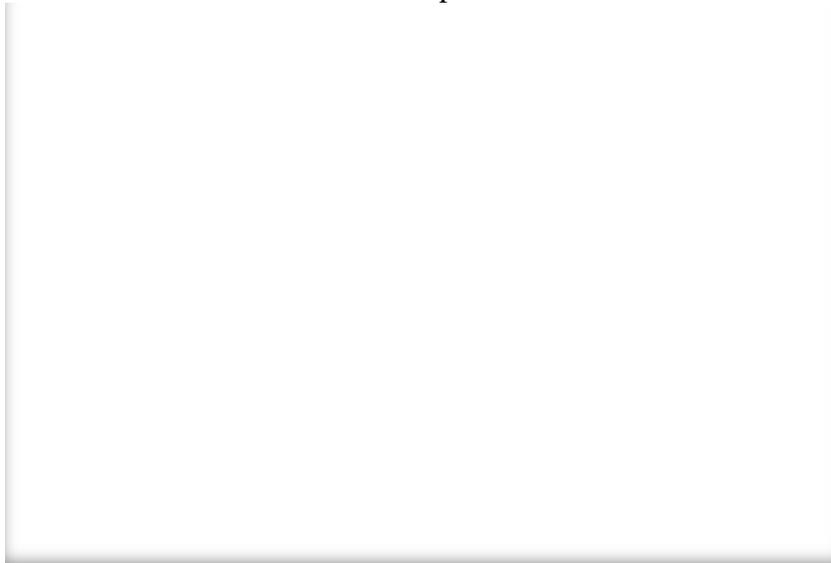
The “*Data Entry Error!*” window will appear when an incorrect data type is entered into a field. This error message does NOT define the error you have made – it is an error indication. The example shown indicates an incorrect date format; another example might be a non-numeric character in an integer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



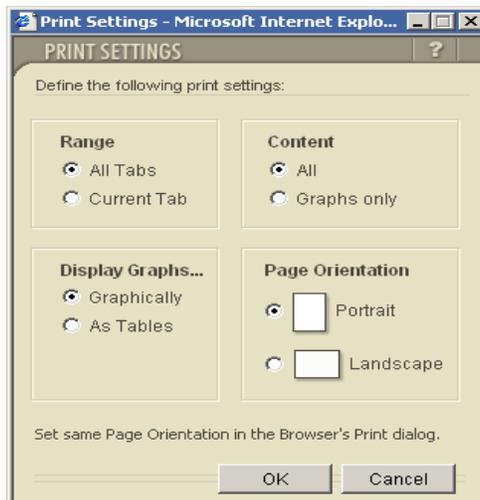
The following indications are used to highlight errors or missing data.



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



**Select the Print Settings:**

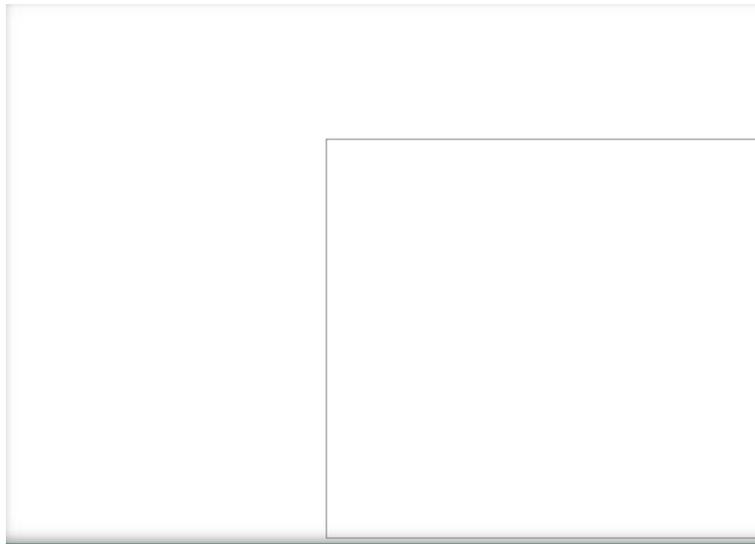


**The word document appears.** Continue to print.

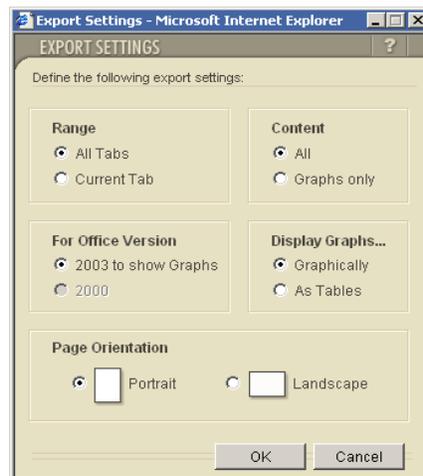
Procurement Business Alignment (Form) / 129 DHRM Procurements (O&M) (Portfolio) ProSight  
Form Report, printed by: Cummings, Edna, Aug 7, 2006

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>	
Allocation Investment In Service Areas	

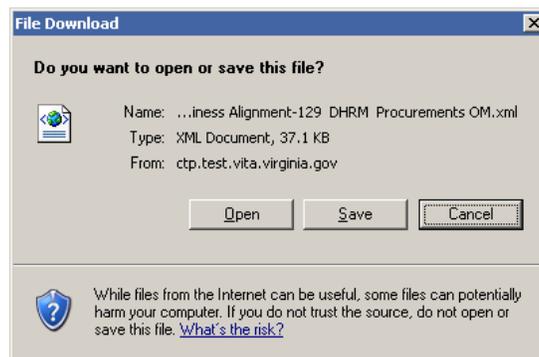
To produce reports, retain a historic record, or provide information outside of Primavera Portfolio Management, use the **EXPORT** feature on the Menu option.



Select the Settings:



Select Open or Save:



The file appears as a word document.

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):	
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 Items. 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.

The screenshot shows a web application interface for 'Project Business Alignment - V1'. The 'SERVICE AREAS' tab is active. Below the 'Align Investment to Service Areas' section, there is a table titled 'Service Areas Supported'. The table has columns for 'Item Name', 'Weight', 'Cost', 'Manager', 'Start Date', 'End Date', and 'Phase'. A red circle highlights the 'Dependency Properties' header, which is positioned above the 'Weight', 'Cost', and 'Manager' columns. The 'Manager' column contains a small yellow icon. To the right of the table are buttons for 'Add...', 'Edit...', and 'Remove'.

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

## Examples – Working with Forms

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

Make sure you are in the Forms Module (click on the “Forms” Module on the Module Navigation bar).

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

- 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 selected).

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

- 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 items 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 an Item Name Search and find an 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 – CPGA 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:

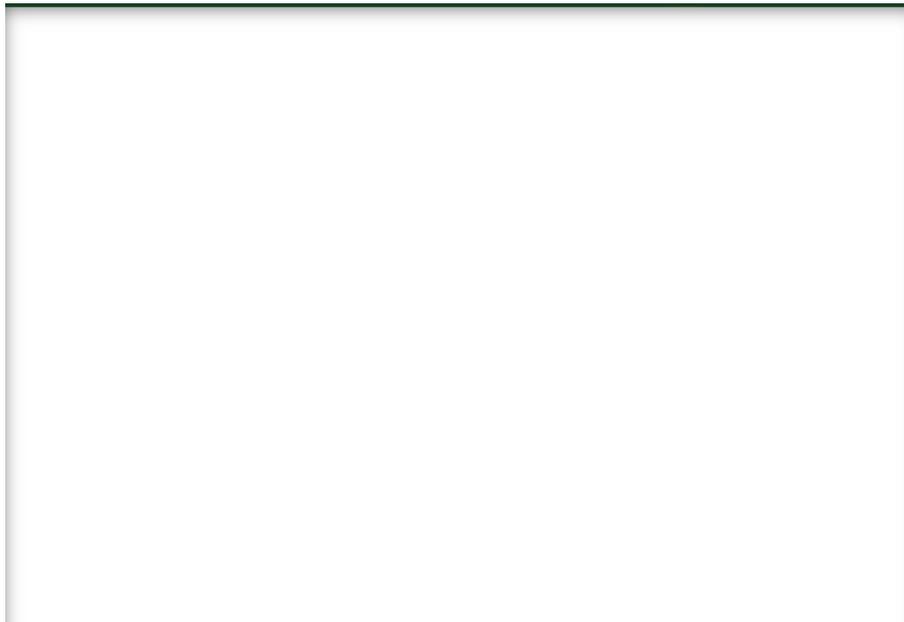
For the CPGA Investment Business Case Form, change the Item and view the data from a different project by selecting a different project from the *Item* drop-down menu.

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.



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

Items	OR/I Type	Submitted by	OR/I Submission Date	Secretary	Agency	Agency OR/I Priority	OR/I Due Date	OR/I Discussion with VITA CAM	AITR Notification Date
136 VITA OR/I	---	Administrator, System	Apr 7, 2014	184 Secretary of Technology	136 Virginia Information Techn...	Medium	Apr 30, 2014	---	Yes
Forms	---	Administrator, System	Apr 17, 2014	184 Secretary of Technology	136 Virginia Information Techn...	High	Apr 30, 2014	---	---
Dashboards	---	Administrator, System	Apr 17, 2014	184 Secretary of Technology	136 Virginia Information Techn...	Medium	May 21, 2014	---	---
Workbook	---	Administrator, System	Apr 23, 2014	184 Secretary of Technology	136 Virginia Information Techn...	High	Jun 1, 2014	---	---
Dependencies	---	Administrator, System	Apr 23, 2014	184 Secretary of Technology	136 Virginia Information Techn...	High	Jun 1, 2014	---	---
New Alert...	---	Administrator, System	Apr 23, 2014	184 Secretary of Technology	136 Virginia Information Techn...	Medium	Sep 1, 2014	---	---



The **Title** and **Menu** bars function as they do in other Primavera Portfolio Management modules.

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

- **Navigation:** 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 value 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 editing and for viewing information connected to the cell contents. Scorecards are used for updating a single parameter, i.e., funding update, and updates on Scorecards are in real time.

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	—
11	Adverse Experien...	—	Motor Vehicle Dealer Board	—	Non-Major	Project	—
12	ALICE	—	—	—	Non-Major	Project	—
13	Jim Project	—	—	—	Major	Project	—
14	jim test	The Commonwealth	Department of Employment Di...	jfjfff	Major	Project	let it go
15	Jim's Project	—	Commonwealth Competition C...	working title	—	Project	—
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 1	Technology	Virginia Information Technolo...	PM Project 1	Major	Project	—

	Major	Project
	Major	Project
	Non-Major	Project
	Major	Project
	Non-Major	Project
	No Value	Project
Implementation of th...	Major	Project
	Major	Project

## **Examples- 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. Click on the Search tab and key in the scorecard you want to access
  - ii. Example – “ Project Data”
- c. Click on the Item/Portfolio drop-down – on the title bar.
  - i. Drill down and select an appropriate portfolio.
  - ii. Example – “161 TAX Projects”

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

- a. Continue with the above Scorecard - “ Project Data”
- b. Select a 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: Processes

'Processes' 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 (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 Processes

To open Processes:

Select **View** from the menu bar → **Show/Hide Guide Panes** from the menu list.



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

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

## Creating a Personal Process Folder within CTP

'Processes' is a tool in Primavera Portfolio Management 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.

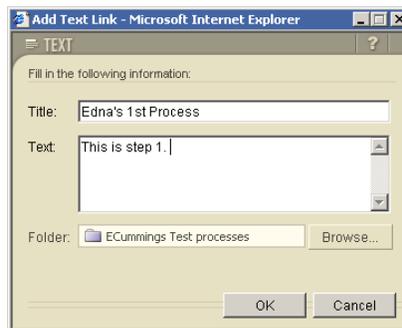
Project Portfolio Management provides a portfolio management governance structure that allows you to manage projects (and other investments) from inception to completion while delivering maximum value. The process described here assumes you are managing a portfolio of projects.

With each system user, Primavera Portfolio Management creates a private folder under 'Processes' that allows each user to create a personal process folder structure.

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

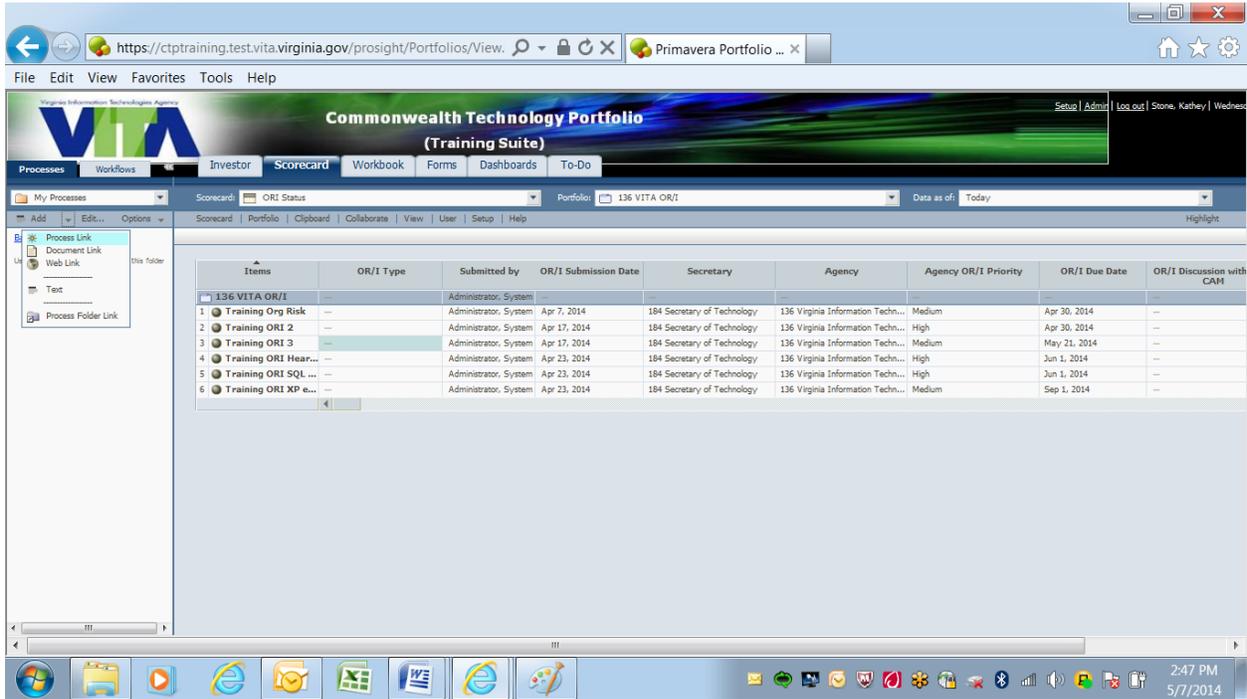


Select → **Add** → **Text**.

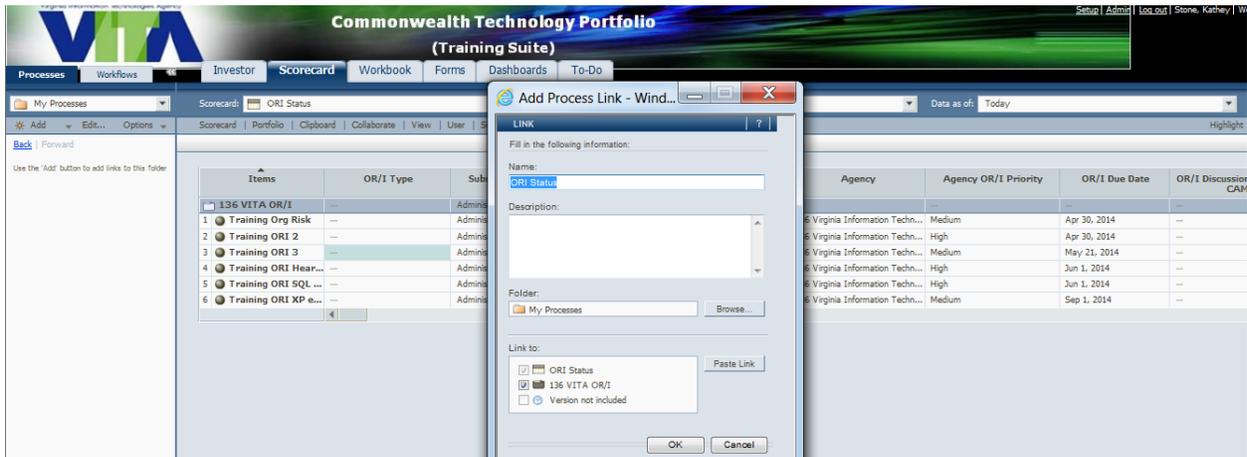


Select **OK**, verify your new information in My Processes.

To Attach a Process Link (form or document), Select → Add → Process Link.

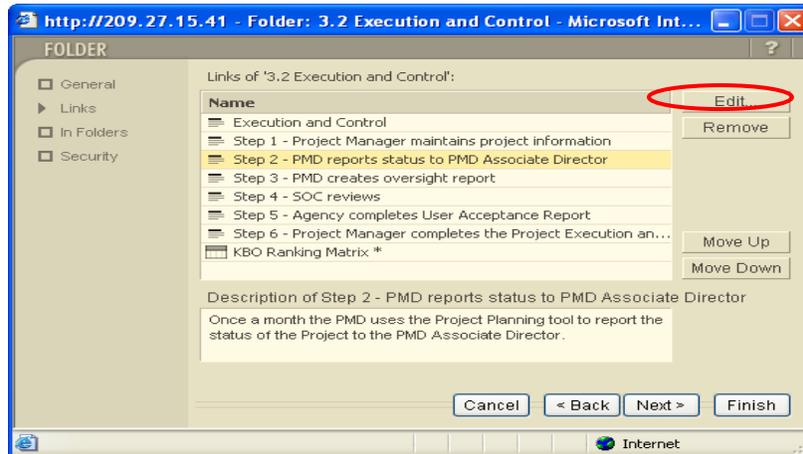


The screen appears for you to add or verify the Process Link. Always verify you have the Process in the correct Process folder.

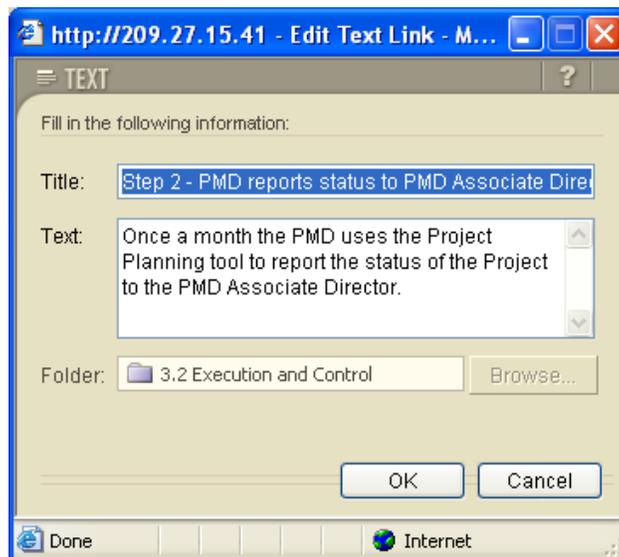


## Editing My Processes:

To Edit 'Processes', click on Edit. A list of links in My Processes 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 ‘Processes’

### 1. Open ‘Processes’:

- a. Select View from Menu Bar.
- b. Select Show/Hide Processes from the drop-down list.
- c. ‘Processes’ window/frame will be displayed on the left side of the screen.

### 2. Create a Personal Folder:

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

### 3. Add a Folder Link:

- a. Select My Processes Folder.
- b. Select Add “Process Folder Link” option by clicking on the drop-down next to the “ADD” button of My Processes.
- c. In the add Process Folder Link window:
  - i. Select the Folder.
  - ii. Enter Name and Description.
  - iii. Click OK to **save and** view the Folder Link in My Processes Folder.

Please refer to “How To’s” in Appendix 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 Primavera Portfolio Management wherein users are able to enter data or access information to support business functions.

- **Modules:** Primavera Portfolio Management contains 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 Primavera Portfolio Management. Through Forms, users enter system data or use Forms 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.

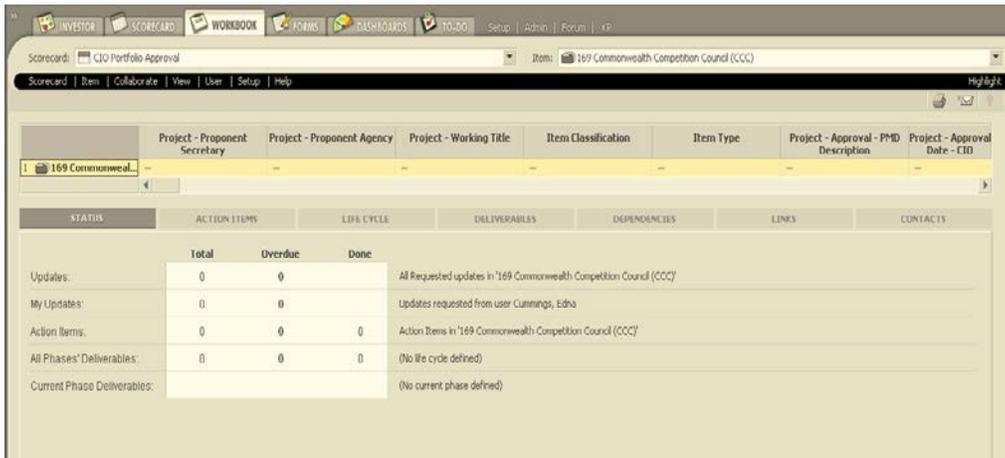


- **Scorecards:** Scorecards are tables to track and manage the performance of items and portfolios according to predefined lists of categories. Scorecards are used to view item and portfolio values by color and shape-coded indicators. Additionally, users can create multiple scorecards and group related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

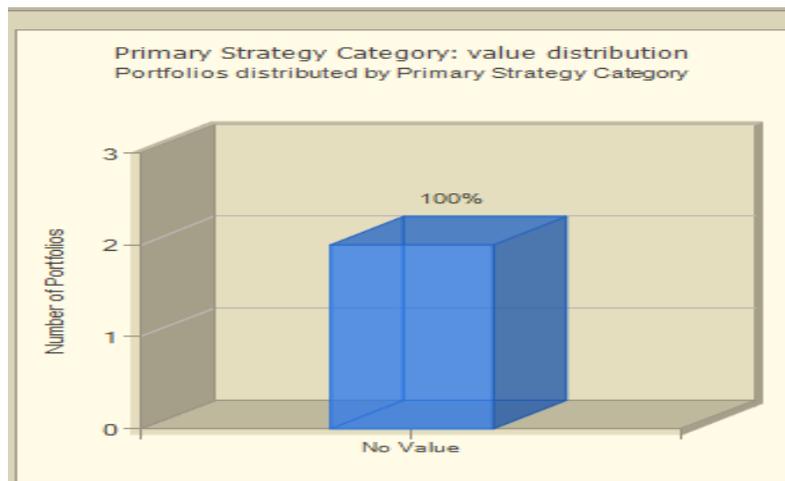
The screenshot shows the 'Scorecard' interface for 'Health and Review' of the '129 Department of Human Resources Management (DHRM)' portfolio. The table displays performance metrics for various portfolios, including '129 Department of H...', '129 DHRM Proc...', '129 DHRM Projects', '129 Agency Head', and '129 AITR'. The metrics include Health (Green), Overall Schedule Health (Missing Dates), Current Phase Schedule Health (No Current Phase), Percent Complete, On Budget, and Dvr Health (OK). The table also includes a 'De... He...' column with star and minus icons.

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 Proc...	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 AITR	Green	★ Missing Dates	◆ No Current Phase	-- --	-- OK	★ --	--

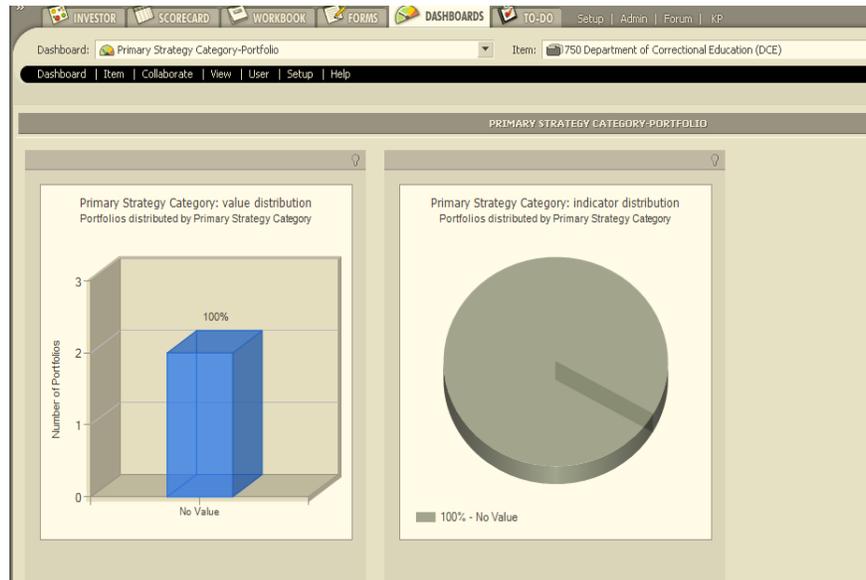
- Workbooks:** The workbook module allows user to manage project-related information about a single investment item. The workbook provides functionality to manage a project's schedule, deliverables, action items, and dependencies. The workbook can be integrated directly into Microsoft Project Server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



- Graphs:** Graphs display historical or current information about an item. Primavera Portfolio Management 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.

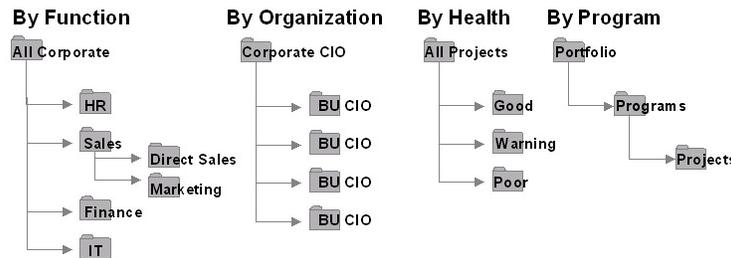


- Maps:** Maps are the strategic center of Primavera Portfolio Management. Investor maps allow senior management to view business activities in terms of risk, investment type, budget, etc. They provide managers with a flexible, visual tool for slicing key performance data according to strategic goals.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



**Hierarchies:** Hierarchies are the business units within Primavera Portfolio Management. All Primavera Portfolio Management' 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 Primavera Portfolio Management user rights or access are controlled by the systems administrators.

- **Users:** Users are all the individuals in the organization with access to Primavera Portfolio Management. 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 Primavera Portfolio Management 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.

**Processes:** My Processes display private or “favorite” sets of URLs and guided workflows that provide users with direct access to anywhere in ‘Processes’, including process 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.



## APPENDIX: Definitions

**Category:** Specific information about items and/or portfolios that are usually descriptive (Name, Description, Comments, etc.), value (financials, dates, durations, etc.), or a rating (Impact = High, etc.). This is similar to a database field.

**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 Primavera Portfolio Management.

**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 Primavera Portfolio Management 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:** A technology investment including Projects and Procurements.

**Item:** Any investment the user tracks in Primavera Portfolio Management (generally interchangeable with "Project, Procurement, BRT or OR/I").

**Knowledge:** A repository of information unique to the current display. Click on the Yellow Light Bulb on the Tool Bar.

**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 Primavera Portfolio Management.

**Investor Maps:** The strategic center of Primavera Portfolio Management 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 Primavera Portfolio Management where users can navigate, i.e. Investor Maps, Scorecards, and Forms.

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

**Portfolio:** 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 Primavera Portfolio Management.

**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 Primavera Portfolio Management users who are all assigned identical rights.