

ProSight IT Strategic Planning Tips and Tricks

- ✓ The Project Business Alignment Form, General Information tab has 3 new categories:
 - Approval for Planning Date: This is a ProSight calculated field automatically generated when “Approval for Planning” is granted by the CIO for a project.
 - Planned Initiation Start Date: The AITR should enter the date when the project initiation phase (charter/proposal) is planned to start.
 - Planned Start Date (Development Approval): The AITR should enter the date when the agency is planning to receive CIO “Approval for Development” for the project. If you are updating an investment already in ProSight, please ensure that the date entered in this field is the planned development start date.

- ✓ Any updates to the Investment Business Case or Project Business Alignment forms require re-approval by the AITR and Agency Head. The approval tab to approve both forms is on the Investment Business Case form. An approval tab does not exist on the Project Business Alignment form.

- ✓ Question 9 on the Investment Business Case and the Alignment to Goals tab on the Project Business Alignment form both address alignment of the investment to the Council on Virginia’s future. Once you have answered the questions in the Project Business Alignment form, question 9 on the Investment Business Case will automatically populate with your answers.

- ✓ The Budget Biennium Tabs on the Project Business Alignment forms contain cost and funding information. We have migrated existing data from CATSPA/ProSight for the 06-08 Biennium financials with the understanding that if a project had not yet gotten underway in FY07, the cost numbers would roll forward. Note that a tab has been set up for funding information for each budget biennium. If you are updating an investment already in ProSight, please ensure that the information across the budget biennium tabs is up to date and that the sum of all planned expenditures across the bienniums is the same as the Project Cost listed on the General Information Tab.

- ✓ Ensure that you are using the Project Business Alignment form to enter projects and the Procurement Business Alignment form to enter procurements. It is very difficult to correct this mistake once the data is entered and will likely have to be re-entered completely.

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Printing Appendix A

Sub-Process 1.6. Review and Print Appendix – A

Complete the following steps to review and print Appendix – A

Step 1: Access “Appendix A – Complete” Form.

[Appendix A - Complete](#)

- Click on the above link to access the Appendix A Complete Form
- Verify the following
 - Form Name – Appendix A – Complete
 - Item is – your agency portfolio (Example: 136 Virginia Information Technologies Agency (VITA)). [You must select a project or procurement within your portfolio.](#)

Step 2: Click on the Appendix A – Tab of the “Appendix A – Complete” Form

- Appendix A – Report will be displayed on this tab
 - Confirm the following
 - Form Name is – Appendix A – Complete
 - Item is – any item (project or a procurement from your agency project or procurement portfolio
- Example: Select any item (Project from 136 VITA Projects, Or any Procurement from 136 VITA Procurements) for Agency 136 Virginia Information Technologies Agency (VITA))

Step 3: Review the Appendix A –as displayed in the “Appendix A - Tab”

“Appendix - A” will be displayed in the Appendix -A Tab” of the form
“Appendix – A” must be reviewed to ensure that it reflects / or gives a correct picture of the Agency IT Strategic Plan

Step 4: Print Appendix A – Report

Instructions for Printing Appendix A report

- Click on “Form” on the ProSight Menu Bar
- Click on “Print” on the “Form” drop-box
 - Print Setting/Selection Box will be displayed
- Select the following on the Print Setting / Selection Box
 - Select “Current Tab” – as we need to print only the Current Tab
 - Select “Portrait”
- Click OK to go to the printer setting screen
 - Printer setting /selection box will be displayed
- Click on the Cancel button to cancel the actual print operation
- A browser window with the link to the Appendix – A Report will be displayed
- Click on the link to go to the Appendix – A Report which is available in a HTML/Printable format
- Confirm the following
 - Item is – your agency portfolio (Example: 136 Virginia Information Technologies Agency (VITA))
- TO PRINT THE APPENDIX A REPORT
 - Click on “File” from browser menu
 - Select “Print”
 - Select Printer
 - Select “OK” to Print the Report

Next steps:

 [Click here to go to the AITR Processes folder](#)

Trouble Printing?

The most common errors for not accessing or printing the report:

1. Ensure you have chosen at “item” --a project or procurement from your agency.
2. Popup blocker is activated--right click on Popup Blocker and choose “Allow Popups from this site”.
3. In Internet Explorer – Internet Options – Security Tab – Internet – Custom Level – Scroll to Downloads. Automatic prompting for file downloads is disabled. Enable Automatic prompting for downloads