

# **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 Workbook 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.

## **PMD Workbook Users Manual**

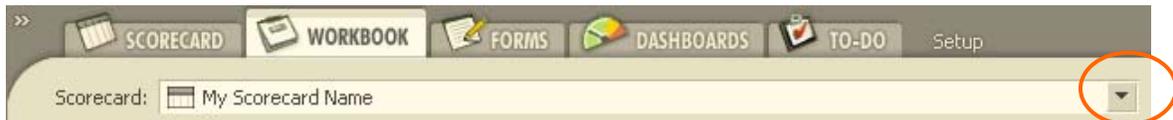
The scope of this document is to provide the necessary instructions for a user to make use of the Workbook feature in Primavera Portfolios. Sometimes called 'Project Lite', it allows the view to gain a quick understanding of the state of the project at a high level. This facilitates portfolio level decision making with regards to the outside world and changing priorities.

## Setting the Scorecard and Item

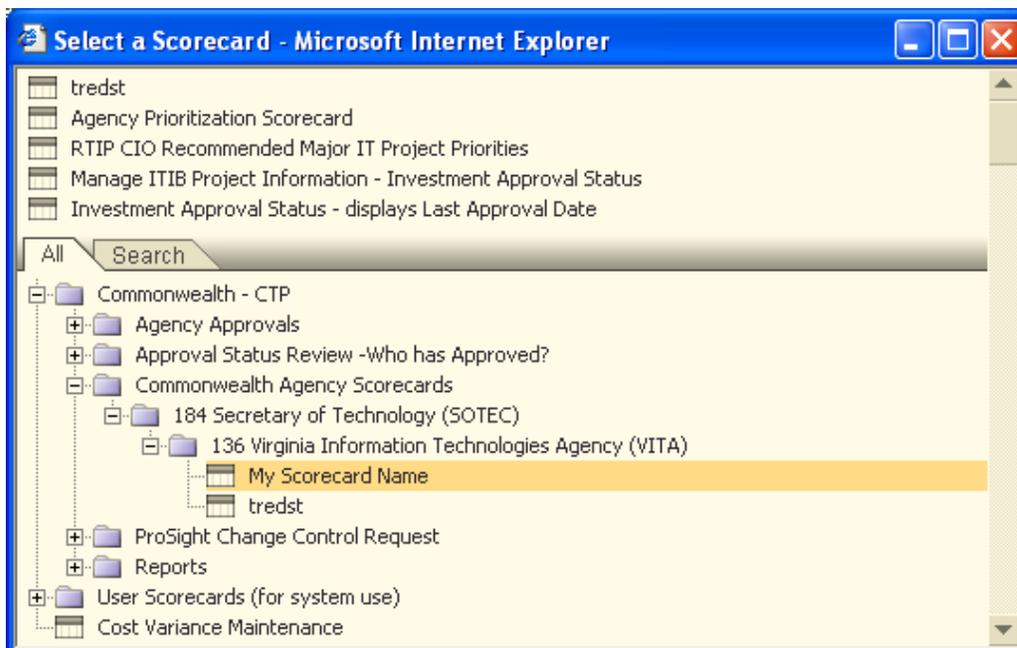
The first step is to navigate to the Scorecard portion of Primavera Portfolios. Please login to Primavera Portfolios and select the Workbook tab as shown below.



Now that the Workbook module is the focus of our attention, we will go through the steps necessary to select a Scorecard for viewing purposes. This Scorecard view is slightly different in there will only be a single item displayed. The information displayed will be relative the Primavera Portfolios Item/Project currently in focus. To choose a Scorecard please click the  button as shown below

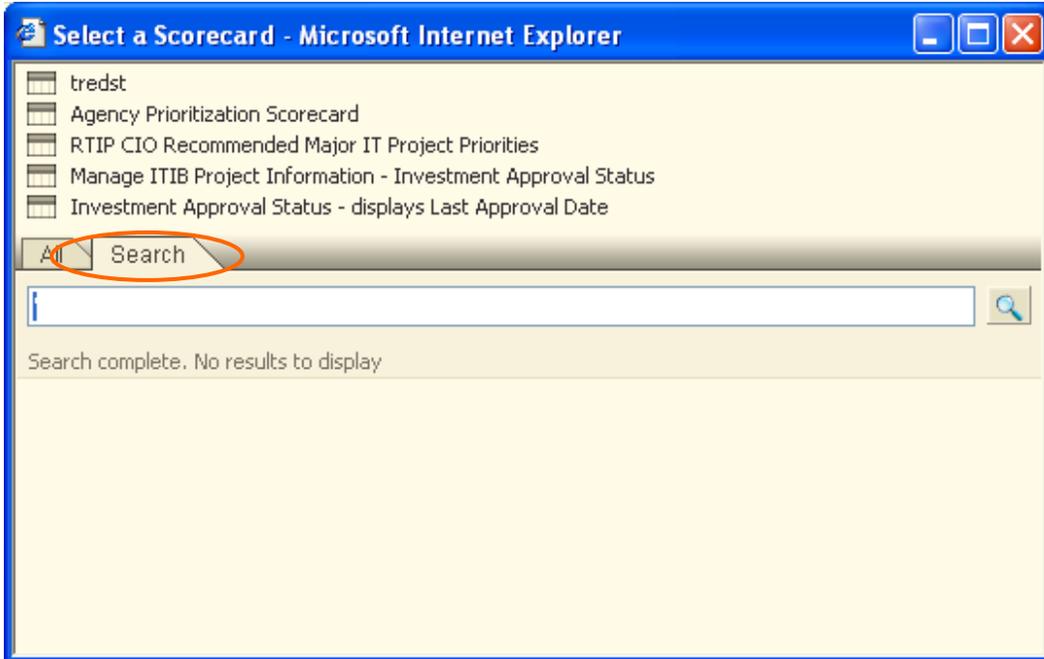


Next you will see a window allowing you to navigate to our agencies folder and locate the Scorecard you wish to view. To continue with our previous example, we have chosen the “My Scorecard Name” Scorecard as shown below.

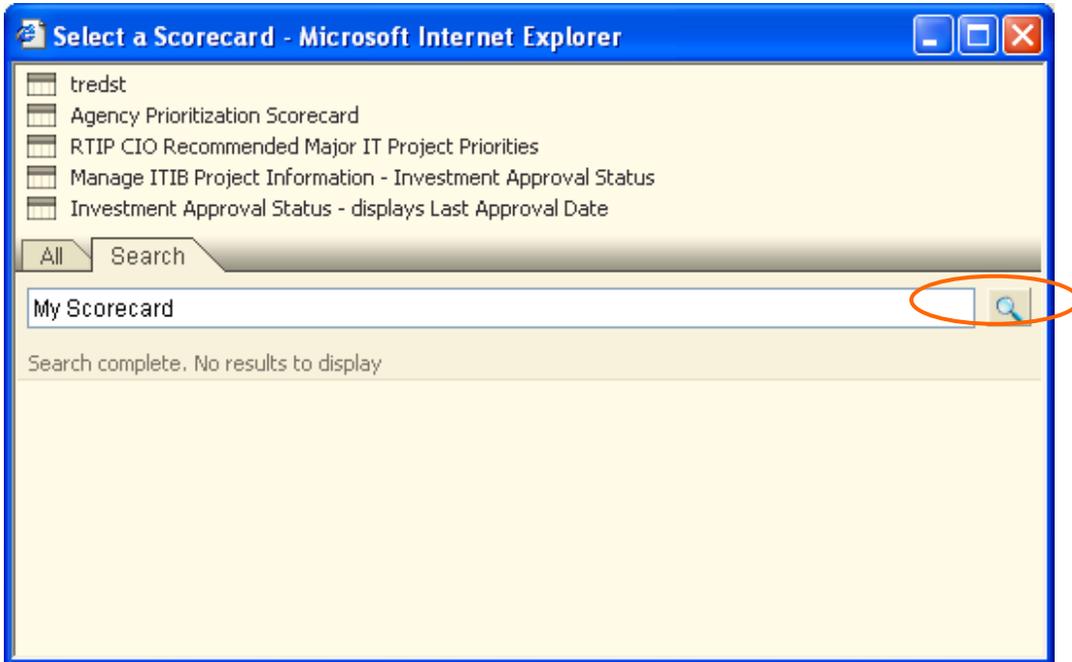




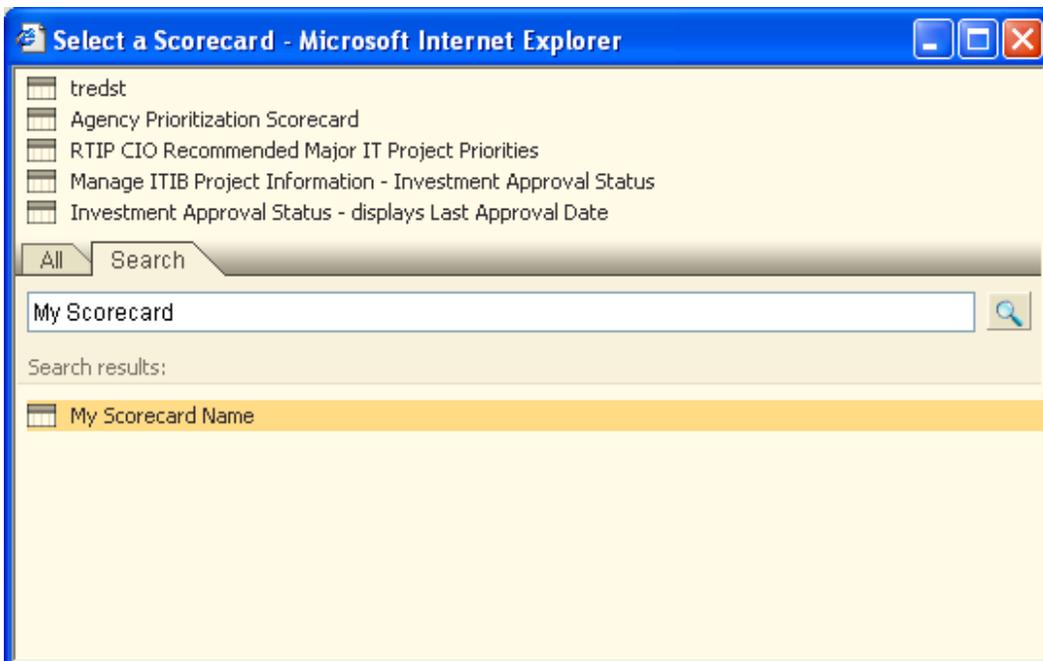
We've made our selection, but there is another way to locate the desired Scorecard. You can search for it by giving a pattern for which to look for, to accomplish this click on the  tab as shown below.



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.

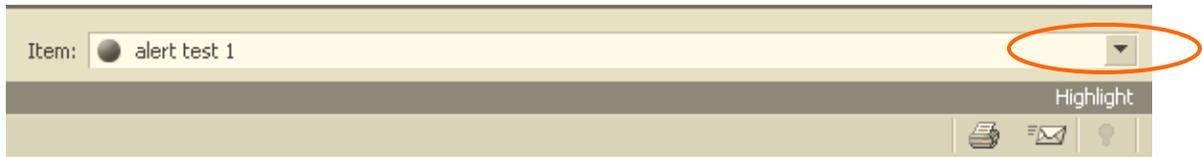


The results of the search are returned to us and we can select the desired Scorecard. In our case we selected the “My Scorecard Name” Scorecard.

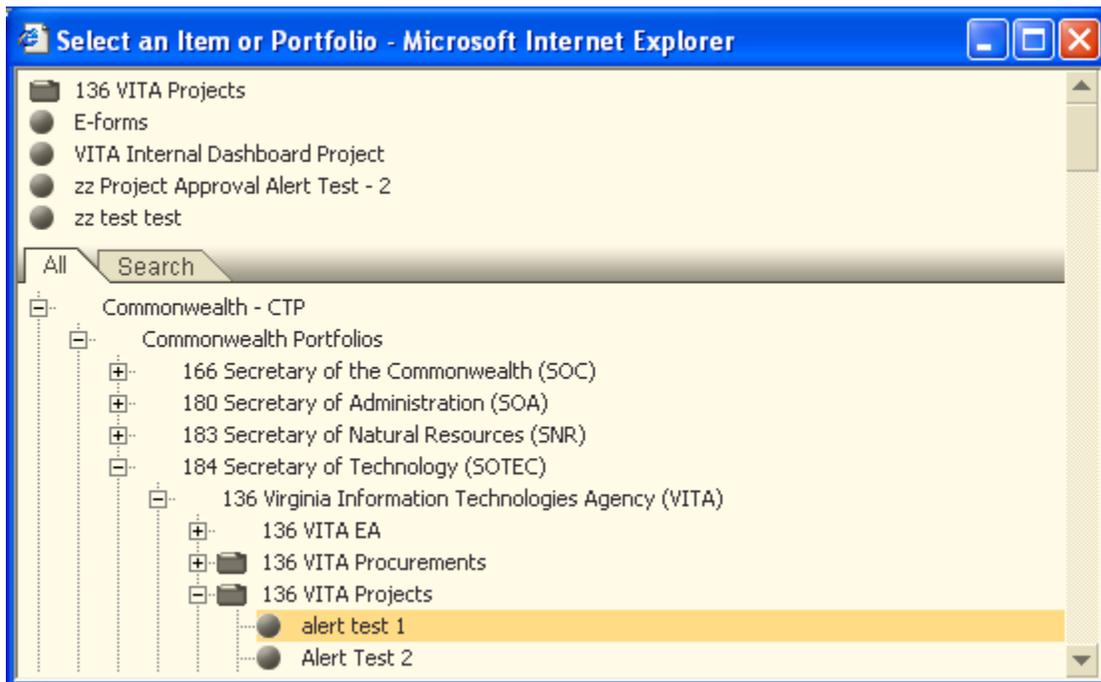


No matter which method you use you should have the 'My Scorecard Name' Scorecard displayed in front of you. Now we have to select the data we wish to see. This is accomplished by selecting the Primavera Portfolios item we want to review. The next series of steps will walk us through the selection process.

To Select an Item click the  button as shown below



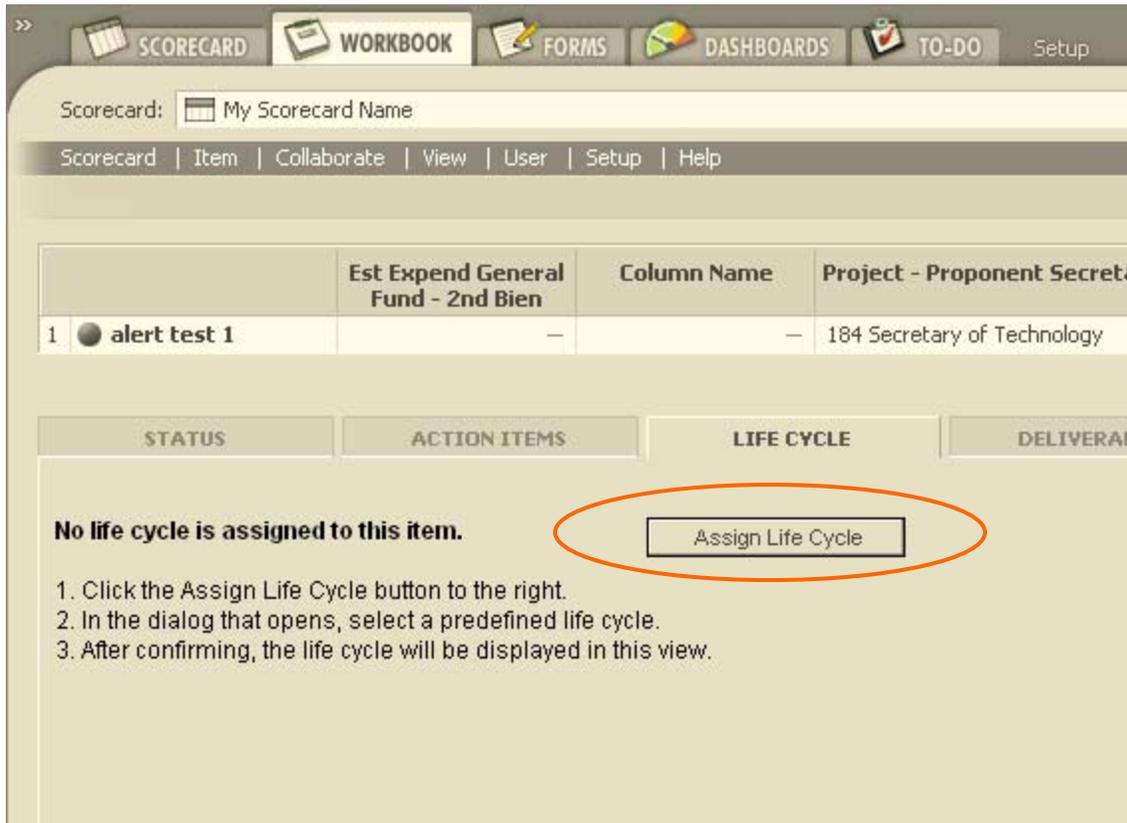
Next you will see a window allowing you to select the Primavera Portfolios item you wish to see. For the example below we have chosen the “alert test 1” project.



## Life Cycle Tab

To assign a life cycle navigate to the Life Cycle tab and click the

Assign Life Cycle



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' link. Below this is a 'Scorecard: My Scorecard Name' section with a menu for 'Scorecard | Item | Collaborate | View | User | Setup | Help'. A table displays data with columns: 'Est Expend General Fund - 2nd Bien', 'Column Name', and 'Project - Proponent Secreta'. The first row shows '1 alert test 1' with values '-' and '184 Secretary of Technology'. Below the table are tabs for 'STATUS', 'ACTION ITEMS', 'LIFE CYCLE', and 'DELIVERABLES'. The 'LIFE CYCLE' tab is active, showing the message 'No life cycle is assigned to this item.' and a circled 'Assign Life Cycle' button. Below the message are three numbered instructions: 1. Click the Assign Life Cycle button to the right. 2. In the dialog that opens, select a predefined life cycle. 3. After confirming, the life cycle will be displayed in this view.

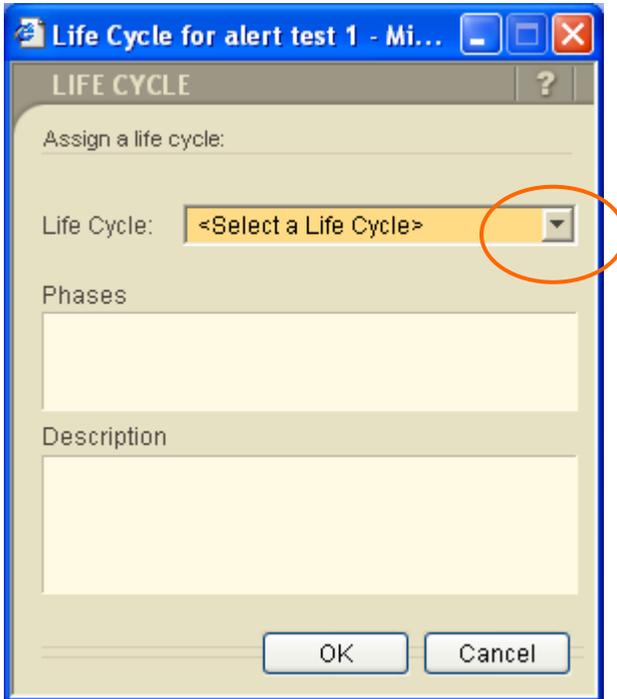
	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secreta
1	● alert test 1	-	- 184 Secretary of Technology

**No life cycle is assigned to this item.**

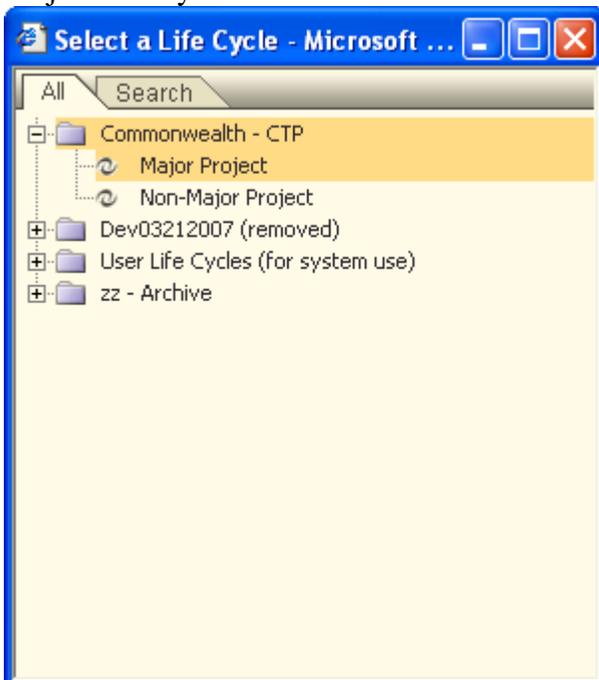
**Assign Life Cycle**

1. Click the Assign Life Cycle button to the right.
2. In the dialog that opens, select a predefined life cycle.
3. After confirming, the life cycle will be displayed in this view.

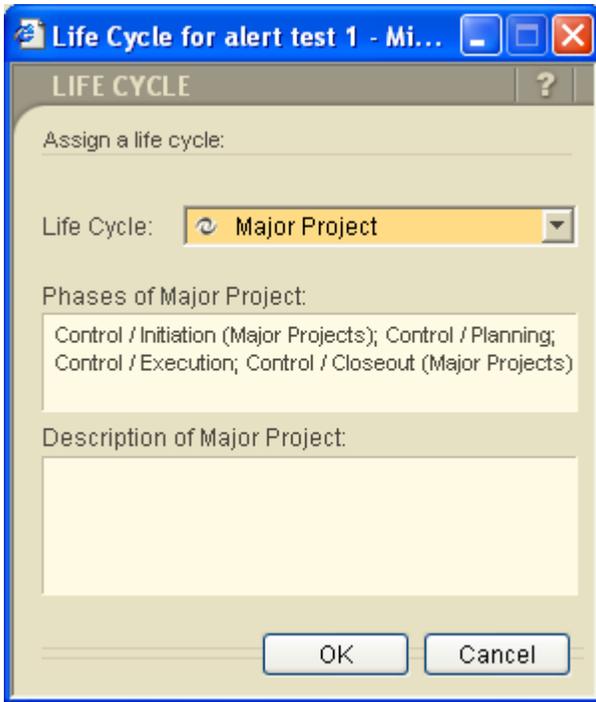
Next you will see the window below. Use the  button to select a life cycle as shown below.



Now you can select the desired life cycle, for this example we have chosen the 'Major Project' life cycle



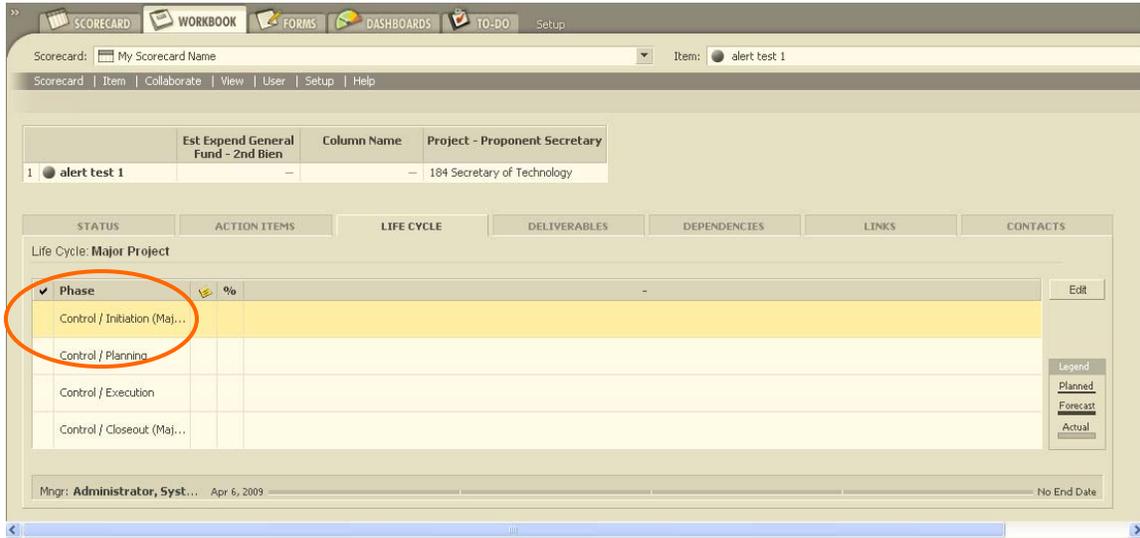
Once you have made your selection the individual phases will be displayed as in the example below.



Click on the  button to apply the chosen life cycle



The figure below shows the cumulative affect of our efforts thus far. We've chosen a life cycle, and the Phase section has populated accordingly. Now, if you double click on the phase title, as shown below a new window will appear allowing you to enter performance metrics relative to the individual phases.



Use this window to apply performance metrics to the individual project phases as required.

**Life Cycle Phases of alert test 1 - Microsoft Internet Explorer**

**LIFE CYCLE PHASES**

Select a phase to view or edit its properties:

**Control / Initiation (...)**    Control / Planning    Control / Execution    Control / Closeout (Maj...)

Status: **Not Started**    % Completed:    Health: ○ ★ ○ ◇ ○ ● ○ None

Planned    Forecast    Actual

Start: 11/2/2009    Start: 11/4/2009    Start: 11/3/2009    Late: 1 day

End: 11/9/2009    End: 11/11/2009    End: 11/10/2009    Late: 1 day

Deliverables:    Date format: m/d/yyyy

Deliverable	Owner	Link	Due Date
✓ Commonwealth Balanced Sco...	Administrator, Sys...		Nov 6, 2009
Preliminary Risk Assessment	Administrator, Sys...		
Project Charter	Administrator, Sys...		
Project Proposal	Administrator, Sys...		

Description of Commonwealth Balanced Scorecard:

No description

Email alert when this phase is modified    Edit Alert...

OK    Cancel

This figure is focused on the **Control / Planning** tab. There are tabs for each phase, all with similar information to be filled in. Also, the deliverables associated with each phase appear in this window. Obviously the deliverables change as you navigate through the tabs/phases.

Life Cycle Phases of alert test 1 - Microsoft Internet Explorer

LIFE CYCLE PHASES

Select a phase to view or edit its properties:

Control / Initiation (Maj... **Control / Planning** Control / Execution Control / Closeout (Maj...

Status: Not Started % Completed: Health: None

Planned Forecast Actual

Start: 11/10/2009 Start: Start: End: 11/16/2009 End: End: Date format: m/d/yyyy

Deliverables:

Deliverable	Owner	Link	Due Date
✓ Budget Plan	Administrator, Sys...		
Change and Configuration M...	Administrator, Sys...		
Communications Plan	Administrator, Sys...		
Procurement Plan	Administrator, Sys...		

Description of Commonwealth Balanced Scorecard:  
No description

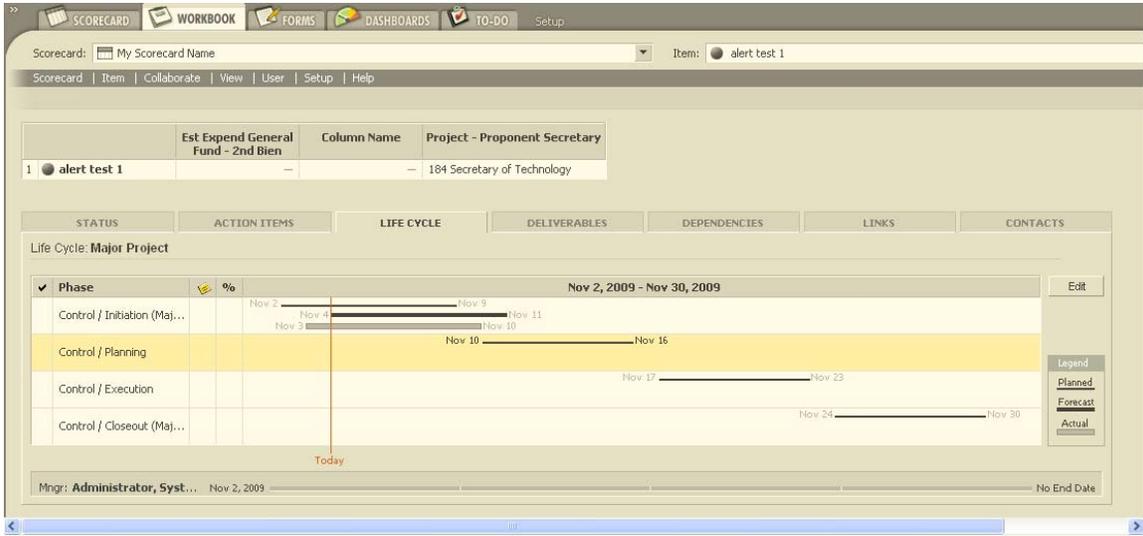
Email alert when this phase is modified

OK Cancel

Click on the  button to apply the performance metrics

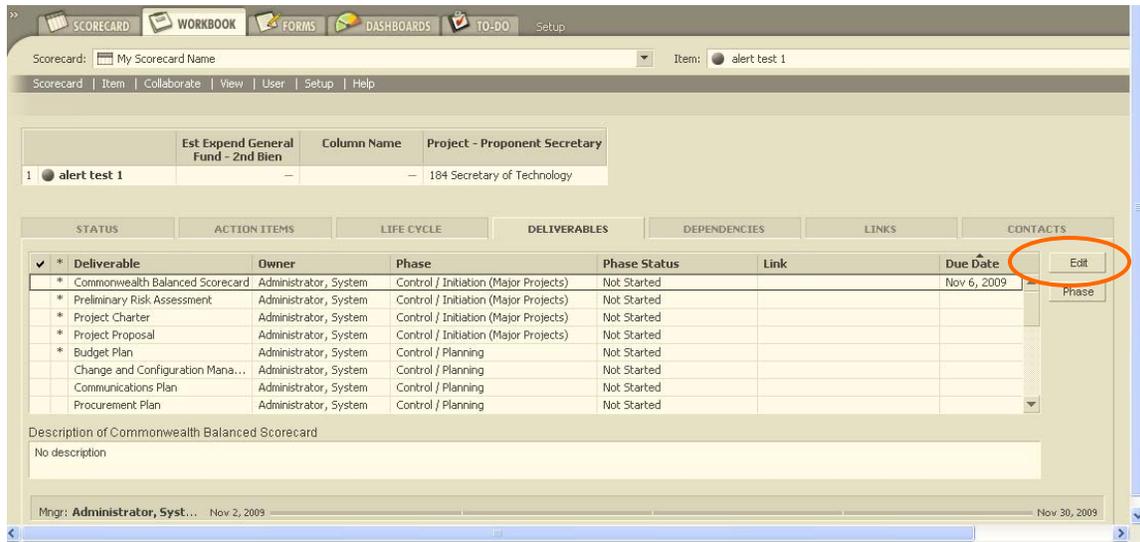


If we revisit the parent window, we now see the associated time lines for each phase. Since the initiation phase is the current phase we have more information available to us. As such all three timelines; planned, forecast, and actual appear in the chart.



## Deliverables Tab

This tab will display all the deliverables for the project. It also provides a quick reference for each deliverable; priority, due date, and whether it's mandatory, the latter being noted by an asterisk in the second column. To modify information specific to a particular deliverable, highlight the desired deliverable and click on the  button as shown below.

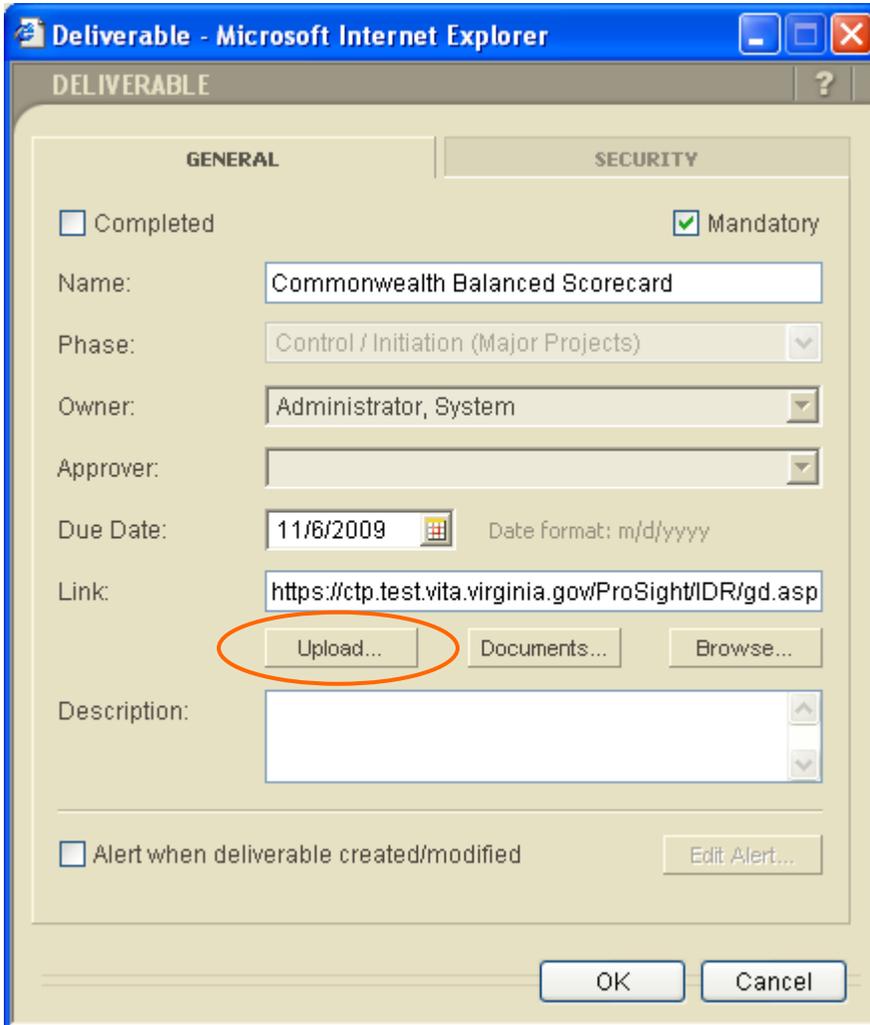


Deliverable	Owner	Phase	Phase Status	Link	Due Date	Edit
* Commonwealth Balanced Scorecard	Administrator, System	Control / Initiation (Major Projects)	Not Started		Nov 6, 2009	
* Preliminary Risk Assessment	Administrator, System	Control / Initiation (Major Projects)	Not Started			
* Project Charter	Administrator, System	Control / Initiation (Major Projects)	Not Started			
* Project Proposal	Administrator, System	Control / Initiation (Major Projects)	Not Started			
* Budget Plan	Administrator, System	Control / Planning	Not Started			
Change and Configuration Mana...	Administrator, System	Control / Planning	Not Started			
Communications Plan	Administrator, System	Control / Planning	Not Started			
Procurement Plan	Administrator, System	Control / Planning	Not Started			

Description of Commonwealth Balanced Scorecard  
No description

Mngr: Administrator, Syst... Nov 2, 2009 Nov 30, 2009

This window will allow you assign a due date and, once completed, a link to the completed document. To upload a document click on the  button as shown below.



**DELIVERABLE**

**GENERAL**      **SECURITY**

Completed       Mandatory

Name:

Phase:

Owner:

Approver:

Due Date:   Date format: m/d/yyyy

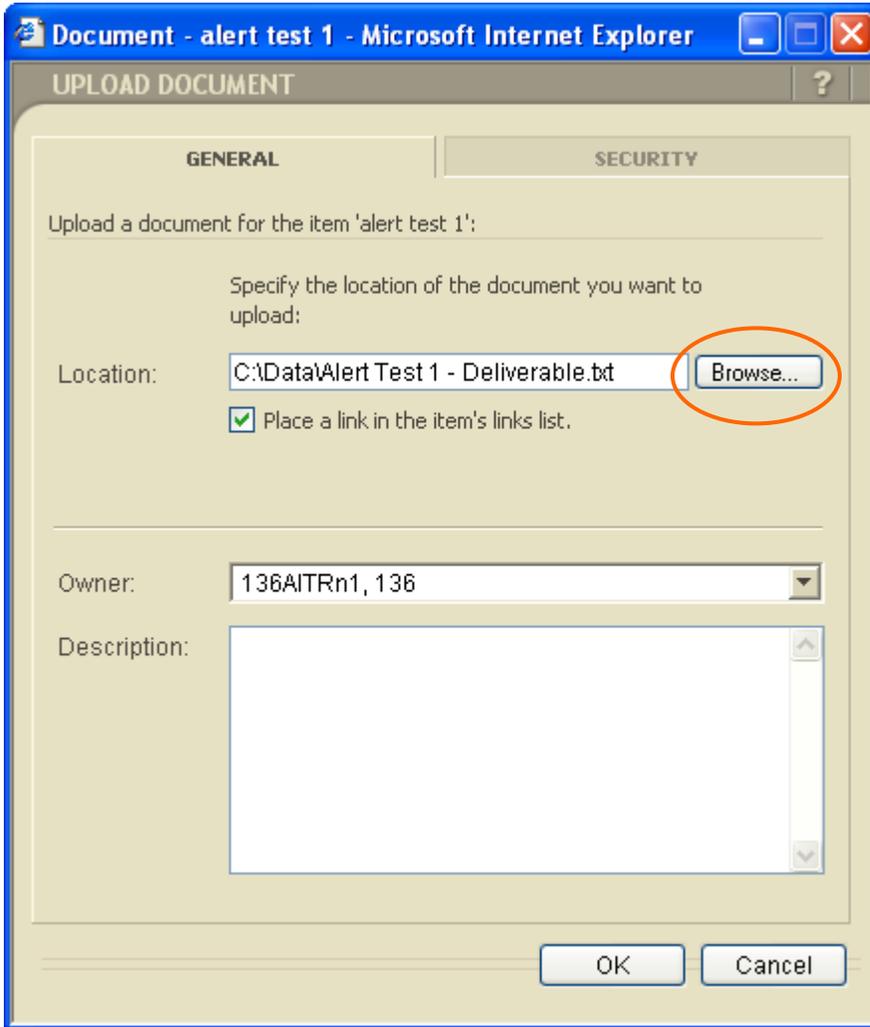
Link:

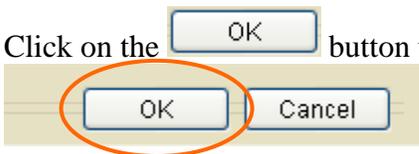
Description:

Alert when deliverable created/modified

In this example we are going to upload the “Alert Test 1 – Deliverable.txt” file. To facilitate this activity please click on the **Browse...** button and navigate to the desired file. Please note the file browser portion is the same as if you were looking for a document in Windows.



Click on the **OK** button to apply the deliverable modifications.



The window below shows the cumulative impacts of uploading a document. Please note the URL in the “Link” column.

Scorecard: My Scorecard Name    Item: alert test 1

Scorecard | Item | Collaborate | View | User | Setup | Help

	Est. Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
1 ● alert test 1	—	—	184 Secretary of Technology

STATUS    ACTION ITEMS    LIFE CYCLE    **DELIVERABLES**    DEPENDENCIES    LINKS    CONTACTS

Deliverable	Owner	Phase	Phase Status	Link	Due Date	Edit
* Commonwealth Balanced Scorecard	Administrator, System	Control / Initiation (Major Projects)	Not Started	<a href="https://ctp.test.vita.virginia.gov...">https://ctp.test.vita.virginia.gov...</a>	Nov 6, 2009	Phase
* Preliminary Risk Assessment	Administrator, System	Control / Initiation (Major Projects)	Not Started			
* Project Charter	Administrator, System	Control / Initiation (Major Projects)	Not Started			
* Project Proposal	Administrator, System	Control / Initiation (Major Projects)	Not Started			
* Budget Plan	Administrator, System	Control / Planning	Not Started			
Change and Configuration Mana...	Administrator, System	Control / Planning	Not Started			
Communications Plan	Administrator, System	Control / Planning	Not Started			
Procurement Plan	Administrator, System	Control / Planning	Not Started			

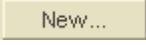
Description of Commonwealth Balanced Scorecard  
No description

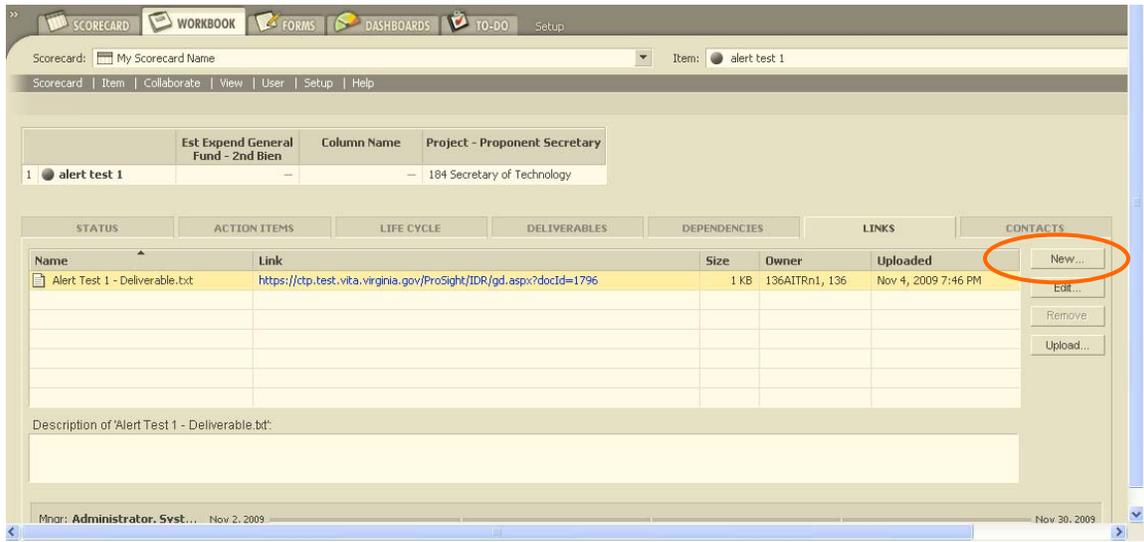
Mngr: Administrator, Syst...    Nov 2, 2009    Nov 30, 2009

Trusted sites

## Links Tab

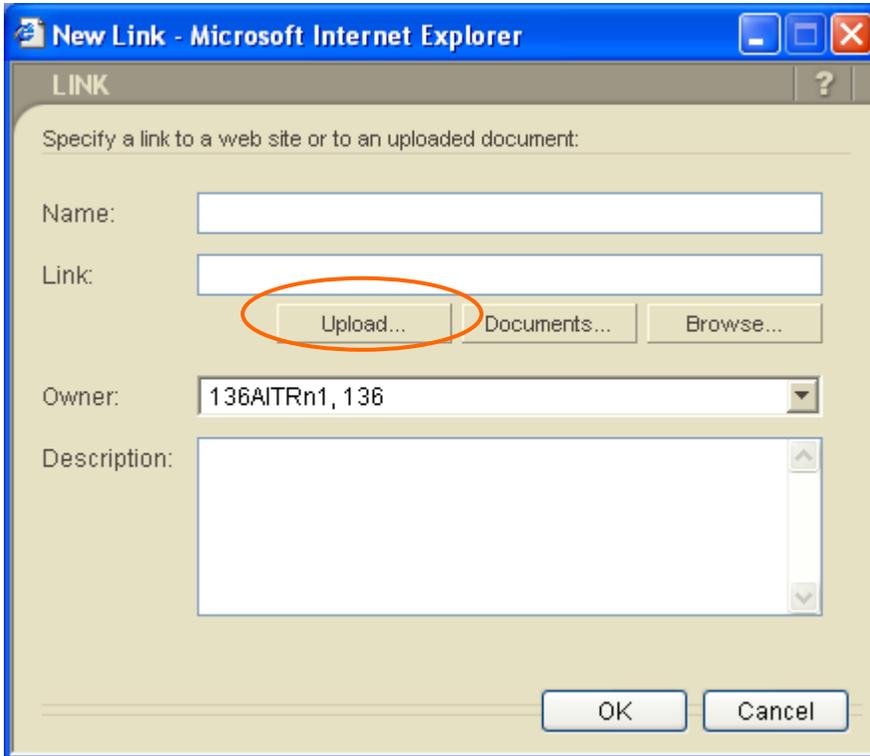
This tab will display all document links associated with the Primavera Portfolios item. The window below displays the contents of the link tab. Please note the document we just uploaded is also shown. To continue with our example, we will upload two additional documents in two different examples. To get started please click on the

 button as shown below.

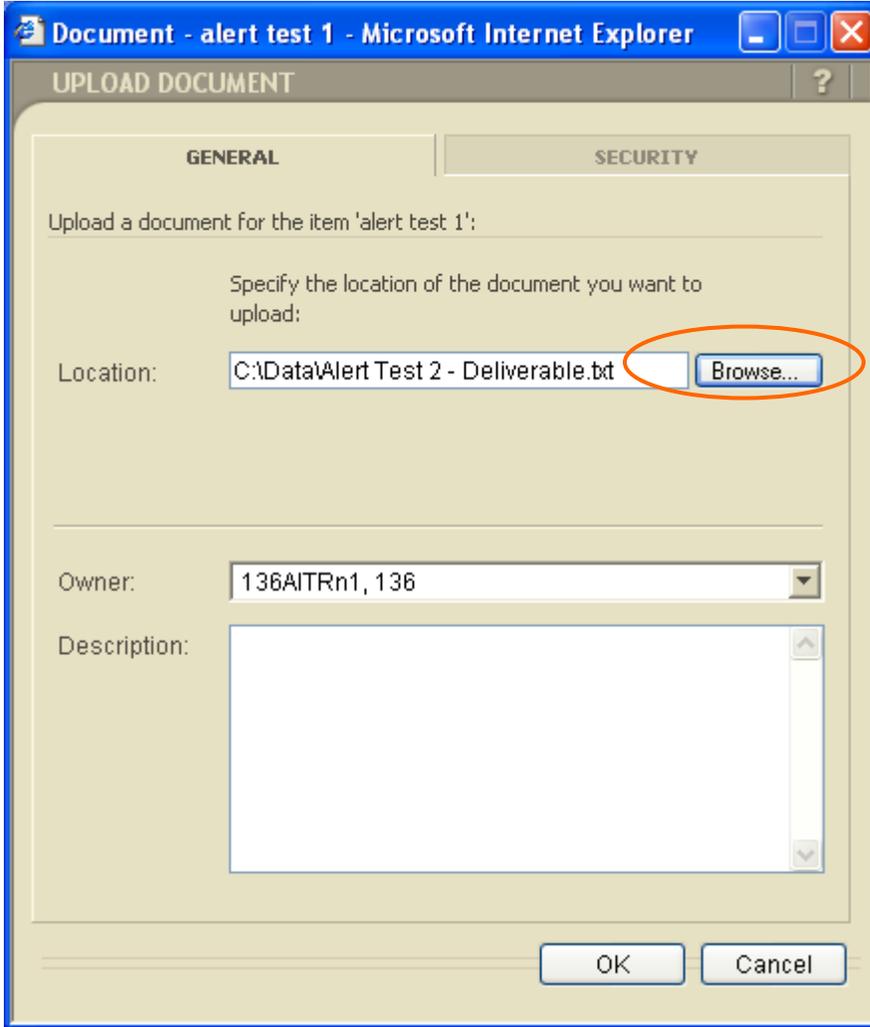


Name	Link	Size	Owner	Uploaded
Alert Test 1 - Deliverable.txt	<a href="https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1796">https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1796</a>	1 KB	136A1TRn1, 136	Nov 4, 2009 7:46 PM

This window will allow you to name and upload a document. To upload a document click on the  button as shown below.



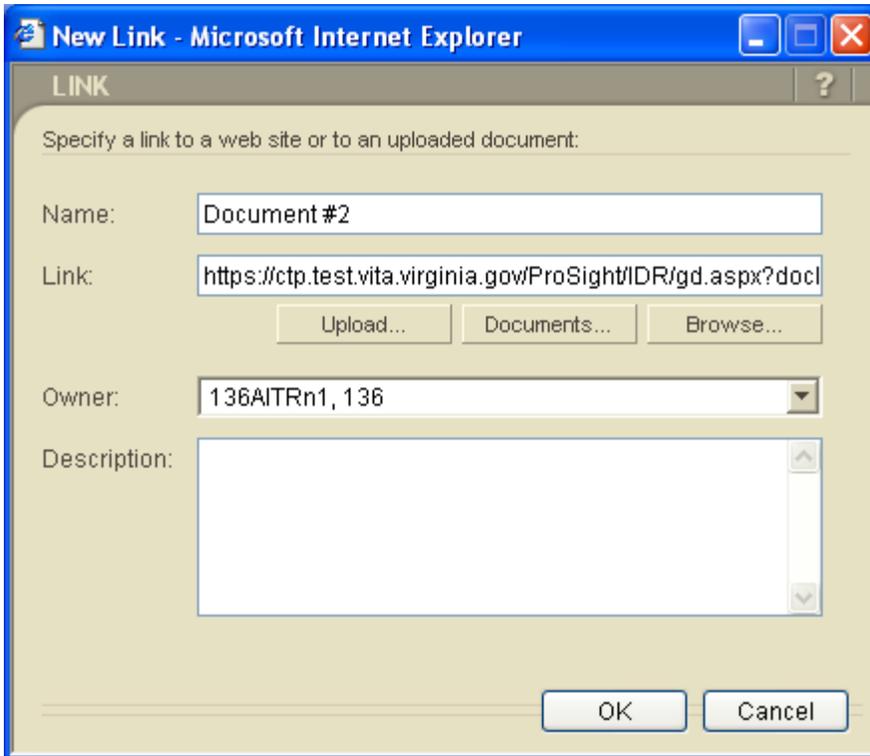
In this example we are going to upload the “Alert Test 2 – Deliverable.txt” file. To facilitate this activity please click on the  button and navigate to the desired file.

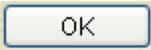


Click on the  button to apply the modifications.



In our example we have named our uploaded document ‘Document #2’ and the URL link has been documented.



Click on the  button to apply the modifications.

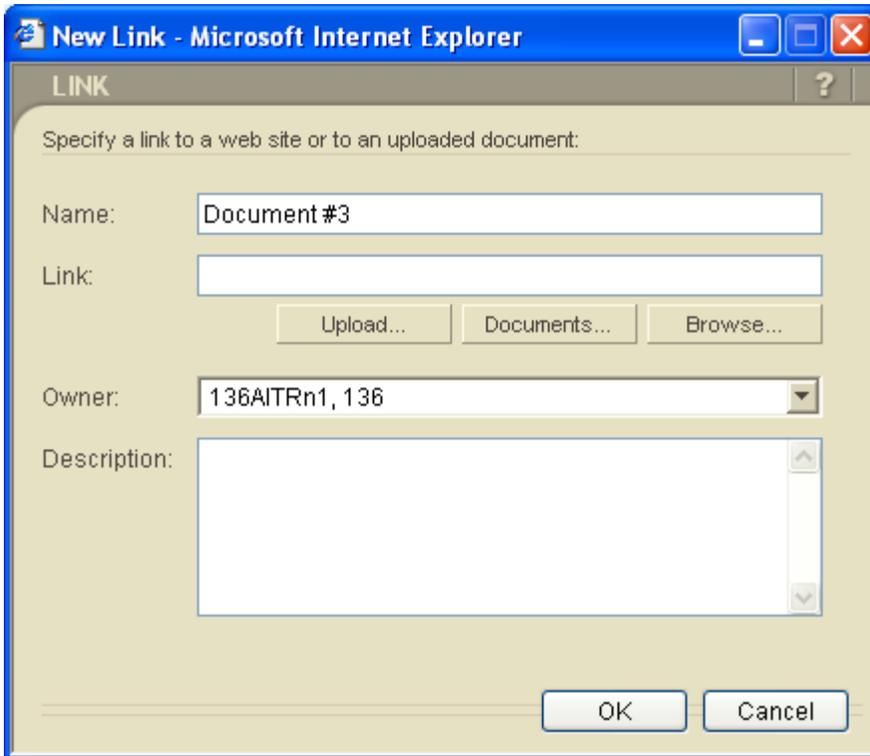


You can also insert a link to a document on another server. This is advantageous if your facility makes use of SharePoint. Please click the **New...** button as shown below.

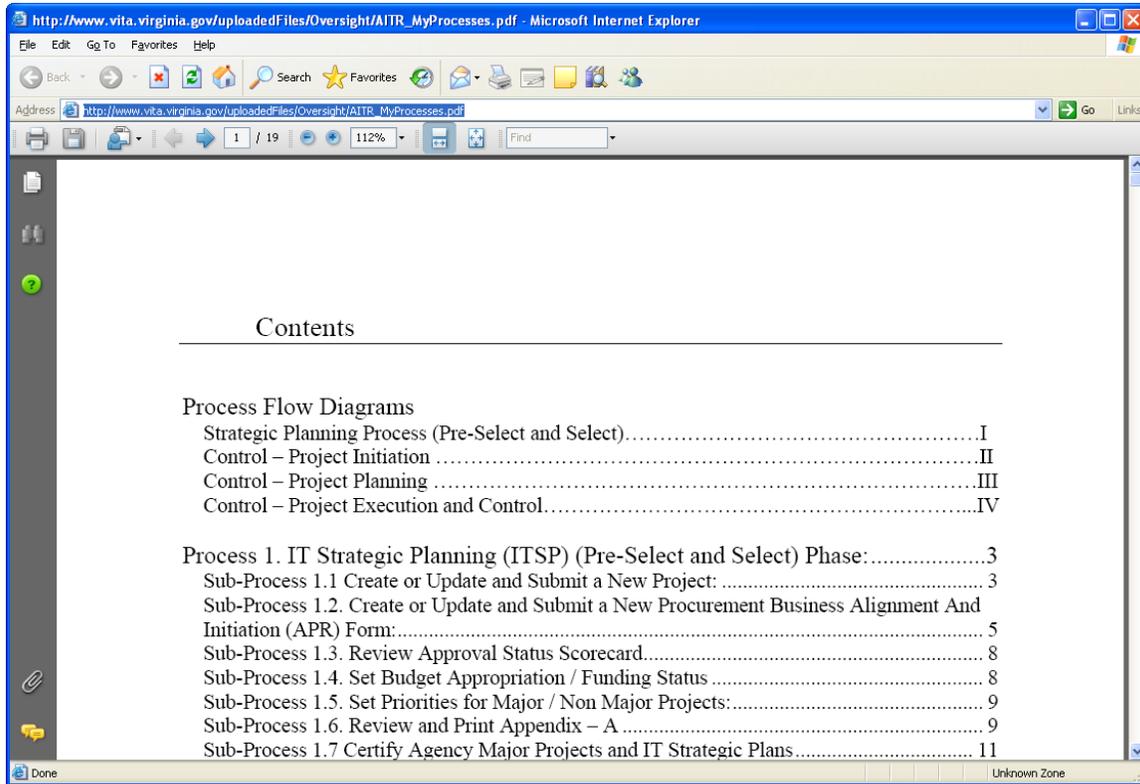
The screenshot shows a software interface with a top navigation bar containing icons for SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO. Below the navigation bar, there is a header area with 'Scorecard: My Scorecard Name' and 'Item: alert test 1'. A menu bar includes 'Scorecard | Item | Collaborate | View | User | Setup | Help'. The main content area features a table with columns: 'Est. Expnd General Fund - 2nd Bien', 'Column Name', and 'Project - Proponent Secretary'. The first row contains '1 alert test 1' and '184 Secretary of Technology'. Below this is a tabbed interface with tabs for STATUS, ACTION ITEMS, LIFE CYCLE, DELIVERABLES, DEPENDENCIES, LINKS, and CONTACTS. The LINKS tab is active, displaying a table with columns: Name, Link, Size, Owner, and Uploaded. Two rows are visible: 'Alert Test 1 - Deliverable.txt' and 'Document #2', both with a size of 1 KB and owner '136AITRn1, 136'. A 'New...' button is circled in red in the top right corner of the LINKS tab. Below the table is a text area labeled 'Description of Document #2:'. The status bar at the bottom shows 'Minor: Administrator, Svst...' and dates 'Nov 2, 2009' and 'Nov 30, 2009'.

Name	Link	Size	Owner	Uploaded
Alert Test 1 - Deliverable.txt	<a href="https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1796">https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1796</a>	1 KB	136AITRn1, 136	Nov 4, 2009 7:46 PM
Document #2	<a href="https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1797">https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1797</a>	1 KB	136AITRn1, 136	Nov 4, 2009 8:01 PM

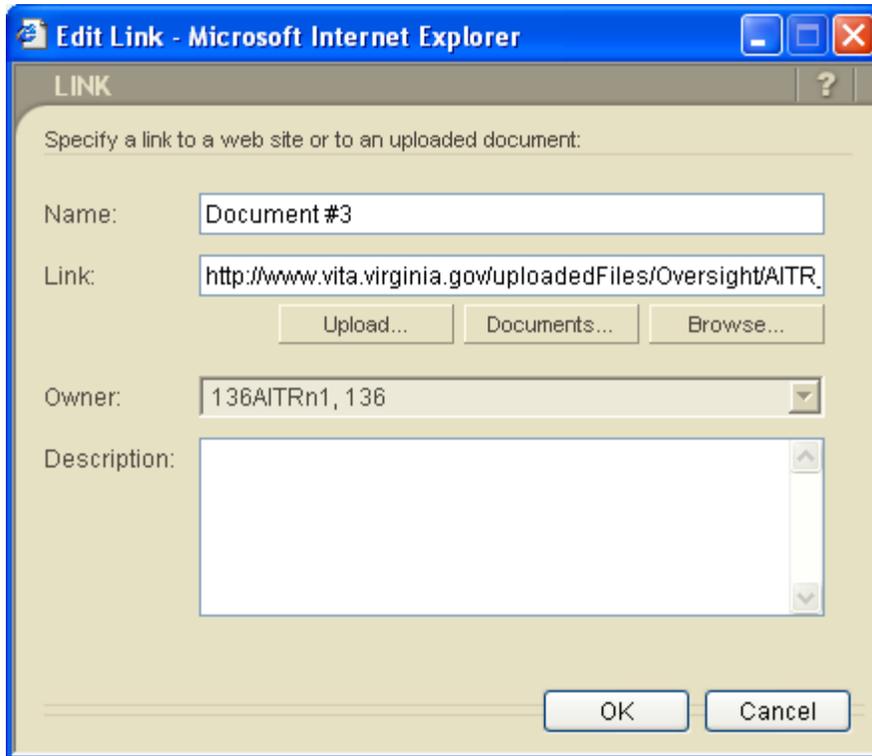
You will then be presented with the window below. As you can see we've given the document a name and are about to apply the link.



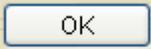
.At this point you can access SharePoint and navigate to the document in question. Once you have opened the document, highlight the URL, and copy it to the Windows paste buffer.



Once you have the URL link in the copy/paste buffer you can then paste (ctrl + V) into the Link field as in the example below.



The draw back to this approach is the lack of date upload traceability/audit ability. But it does allow for the usage of different assets for document management. And those assets could be used to provide the any needed traceability /audit ability.

Click on the  button to apply the modifications.



This figure shows the parent window after the above sequence of events has been completed. Please note the addition of “Document #2” and “Document #3” to the list.

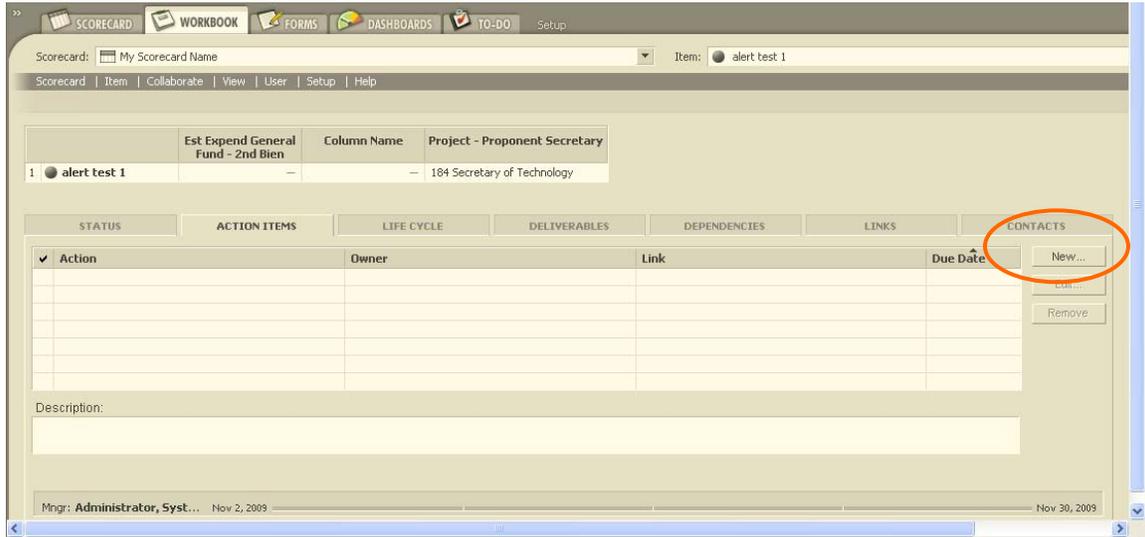
The screenshot displays a software application window with a menu bar (INVESTOR, SCORECARD, WORKBOOK, FORMS, DASHBOARDS, TO-DO) and a toolbar. The main content area is divided into several sections:

- Scorecard Section:** Shows "My Scorecard Name" and "Item: alert test 1".
- Table Section:** A table with columns: "Est Expend General Fund - 2nd Bien", "Column Name", and "Project - Proponent Secretary". It contains one row for "alert test 1" with a value of "184 Secretary of Technology".
- Navigation Tabs:** STATUS, ACTION ITEMS, LIFE CYCLE, DELIVERABLES, DEPENDENCIES, LINKS, CONTACTS.
- LINKS Table:**

Name	Link	Size	Owner	Uploaded
Alert Test 1 - Deliverable.txt	<a href="https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1796">https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1796</a>	1 KB	136AITRn1, 136	Nov 4, 2009 7:46 PM
Document #2	<a href="https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1797">https://ctp.test.vita.virginia.gov/ProSight/IDR/gd.aspx?docId=1797</a>	1 KB	136AITRn1, 136	Nov 4, 2009 8:01 PM
Document #3	<a href="http://www.vita.virginia.gov/uploadedFiles/Oversight/AITR_MyProcesses.pdf">http://www.vita.virginia.gov/uploadedFiles/Oversight/AITR_MyProcesses.pdf</a>		Administrator, Sys...	
- Description:** A text area for entering details.
- Footer:** Shows "Mnar: Administrator, Svst..." and dates "Nov 2, 2009" and "Nov 30, 2009".

## Action Items Tab

The figure below shows the Action Items table before we enter any information. For this exercise, we are going to enter an action item, please select the  button as shown below.



Next you will see the Primavera Portfolios wizard used to maintain the individual actions items. In the figure below we've entered a; Name, Start date, End date, and status (i.e. Completed) for the action item.

The screenshot shows a dialog box titled "Action Item - Microsoft Internet Explorer". The dialog has two tabs: "GENERAL" and "SECURITY". The "GENERAL" tab is selected. The "Completed" checkbox is checked. The "Name" field contains "Action Item #1". The "Owner" and "Approver" dropdown menus both show "136AITRn1, 136". The "Start Date" and "Due Date" are both set to "11/4/2009". The "Link" field contains "http://". The "Description" text area contains "First action item". At the bottom, there is an unchecked checkbox for "Alert when action item created/modified" and an "Edit Alert..." button. The "OK" and "Cancel" buttons are at the bottom right.

Click on the  button to apply the Action Item modifications.



The figure below displays the cumulative affects of two action items that have been entered into the system. Please note one is past due and is highlighted in **red**.

The screenshot shows a web-based interface for a scorecard. At the top, there are navigation tabs: SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO. Below these, the current scorecard is identified as 'My Scorecard Name' and the selected item is 'alert test 1'. A menu bar includes 'Scorecard', 'Item', 'Collaborate', 'View', 'User', 'Setup', and 'Help'.

A table displays the scorecard data:

	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
1		--	184 Secretary of Technology

Below this table, there are several tabs: STATUS, ACTION ITEMS, LIFE CYCLE, DELIVERABLES, DEPENDENCIES, LINKS, and CONTACTS. The 'ACTION ITEMS' tab is active, showing a table with the following columns: Action, Owner, Link, and Due Date. The 'Due Date' column is highlighted in red for the second action item.

Action	Owner	Link	Due Date
✓ Action Item #1	136AITRn1, 136		Nov 4, 2009
Action Item #2	136AITRn1, 136		Nov 3, 2009

Below the table, there is a section for 'Description of Action item #2' with a text input field containing 'Action Item #2'. At the bottom, a status bar shows 'Mgr: Administrator, Syst...' and dates 'Nov 2, 2009' and 'Nov 30, 2009'.

## Status Tab

The figure below shows the cumulative efforts thus far. It is meant to provide a quick quantitative overview the project. Please note the 'All Phases Deliverables' line as it shows all 18 deliverables. Also, please note the 'Action Items' line, if you remember we created two action items, their status is shown at a summary level. All other lines have a similar intent.

Scorecard: My Scorecard Name Item: alert test 1

Scorecard | Item | Collaborate | View | User | Setup | Help

	Est Expend General Fund - 2nd Bien	Column Name	Project - Proponent Secretary
1 alert test 1	-	-	184 Secretary of Technology

**STATUS** | ACTION ITEMS | LIFE CYCLE | DELIVERABLES | DEPENDENCIES | LINKS | CONTACTS

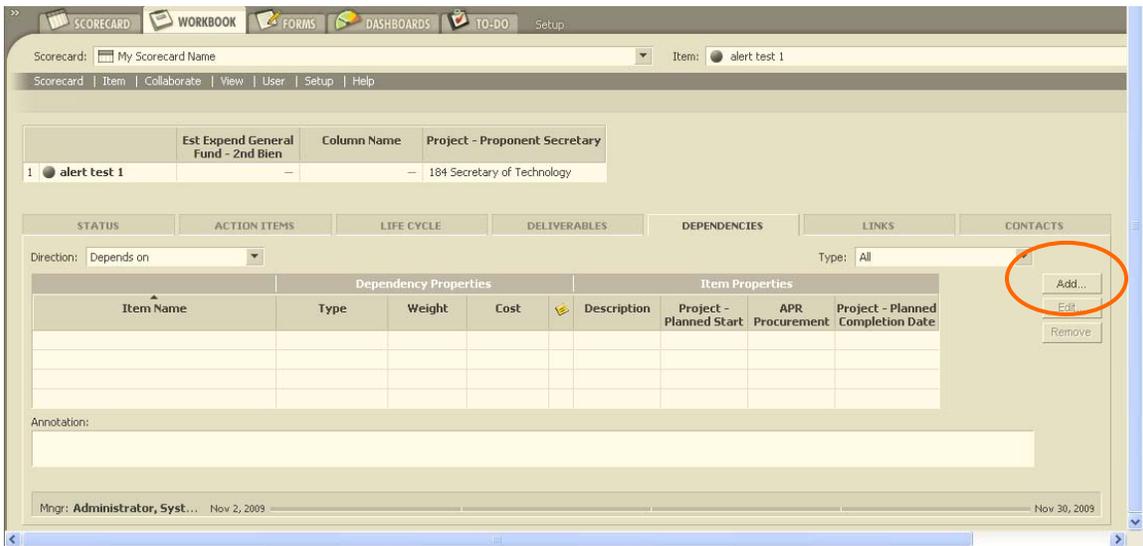
	Total	Overdue	Done	
Updates:	0	0		All Requested updates in 'alert test 1'
My Updates:	0	0		Updates requested from user '136A1TRn1, 136'
Action Items:	2	1	1	Action Items in 'alert test 1'
All Phases Deliverables:	18	0	0	Deliverables defined for life cycle 'Major Project'
Current Phase Deliverables:				(No current phase defined)

Mngr: Administrator, Syst... Nov 2, 2009 Nov 30, 2009

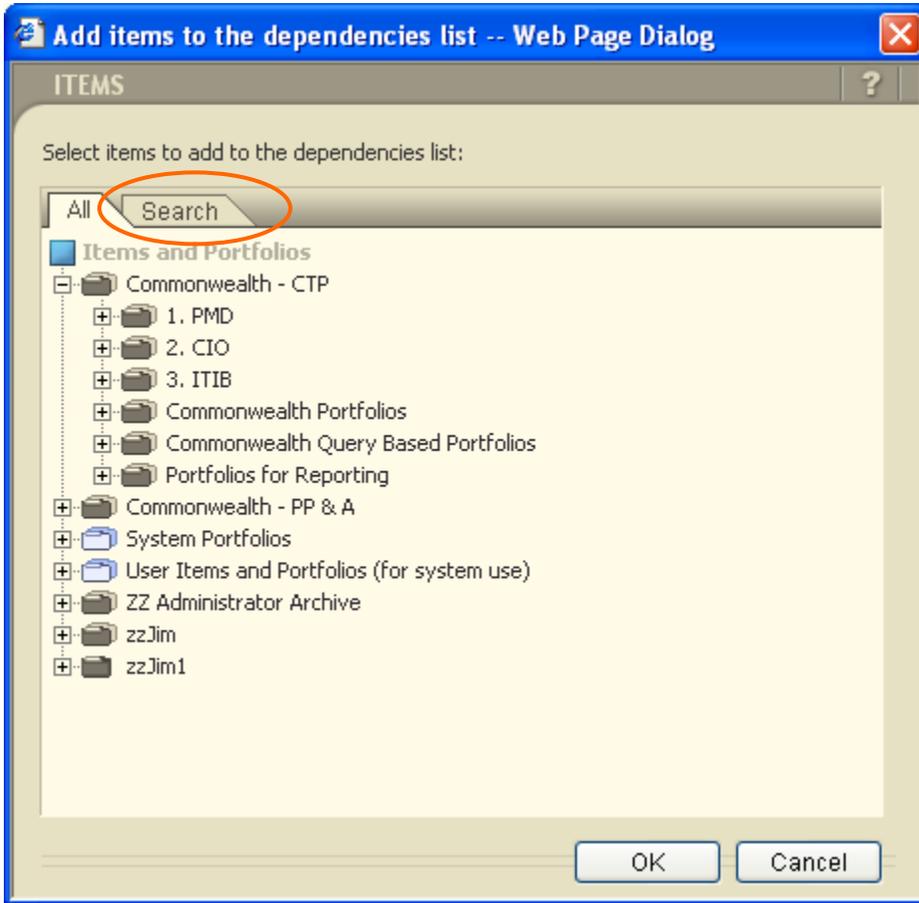
## Dependencies Tab

A dependency is a relationship where one Primavera Portfolios item (project or procurement) may 'Depend On' or 'Support' another Primavera Portfolios item. For this example we will create a procurement that is justified because it is needed for a project. In this example the project 'Depends On' the procurement, and the procurement 'Supports' the project.

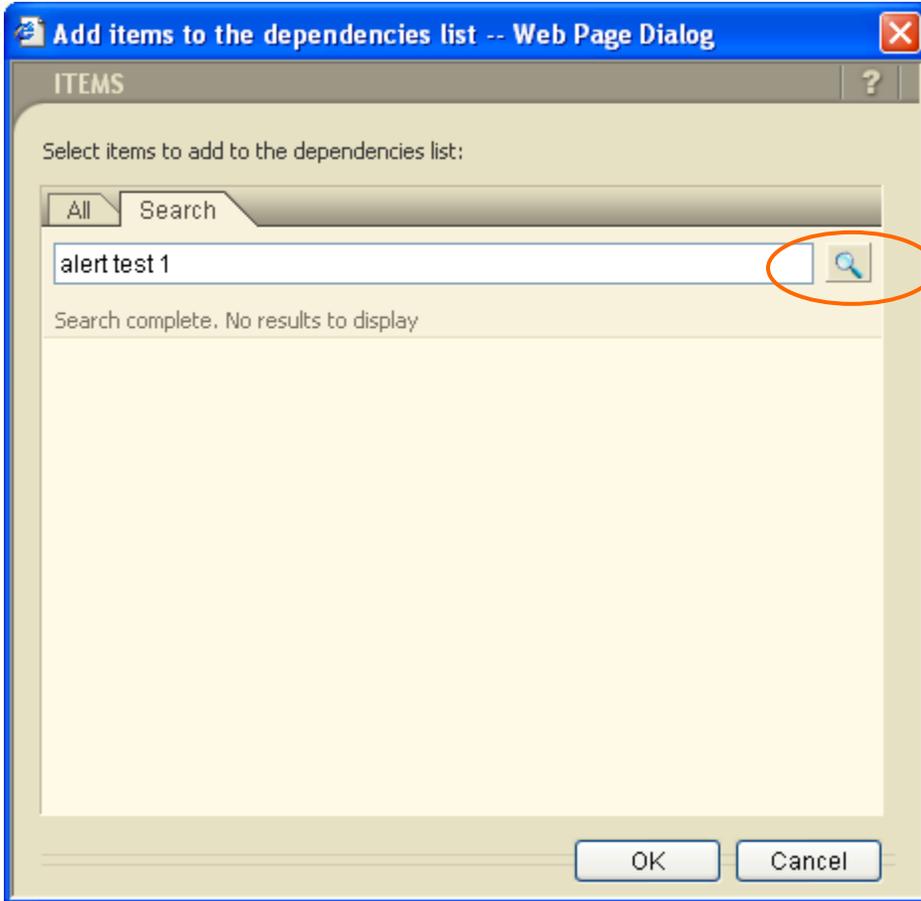
Please note this project currently has no 'Depends On' (Direction: Depends on) relationships. To add a dependency, please click on the Add... button as shown below.



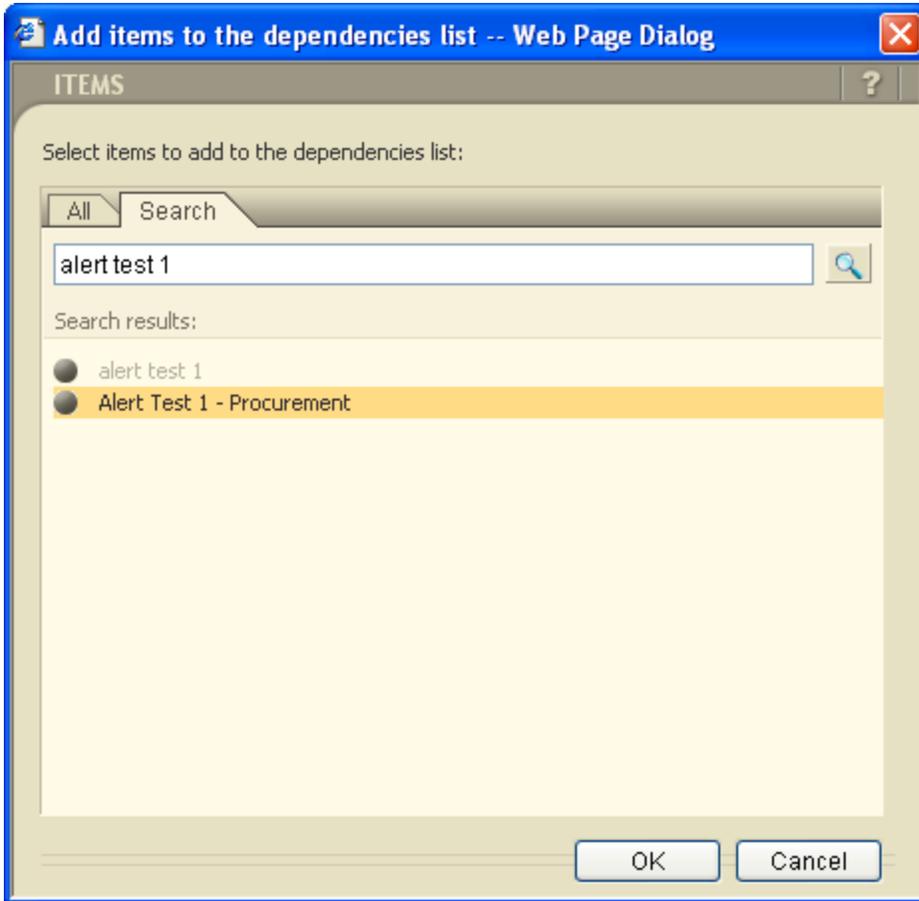
Now we are going to search for a particular procurement to support this project. To accomplish this click on the  button as shown below.



In this example we will be looking for the procurement “Alert Test 1 – Procurement”. To accomplish this please enter the pattern “alert test 1” in the text box and click the  button as shown below.



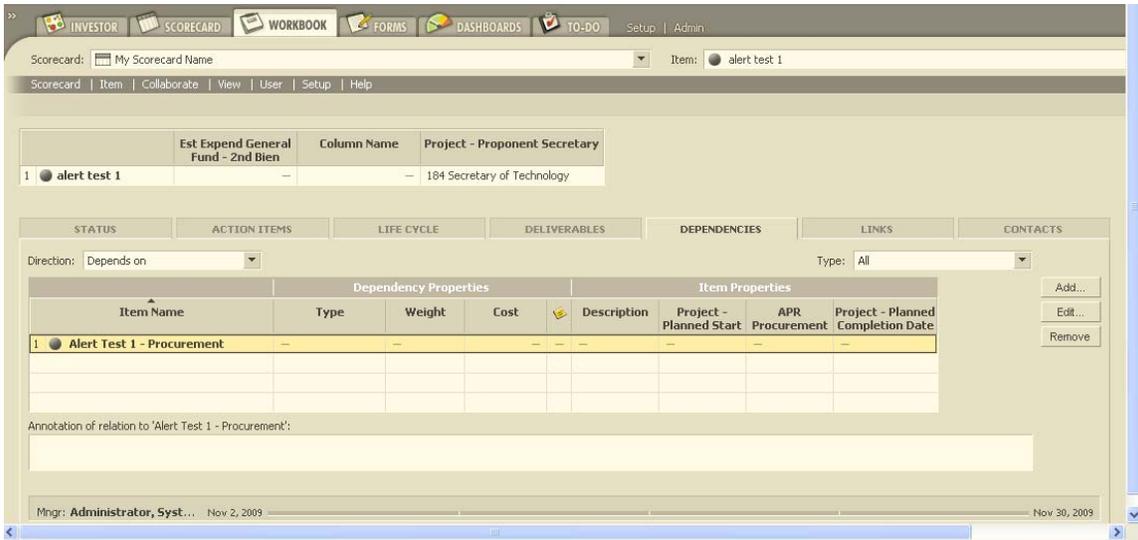
The result of the search action is a list of possibilities that match the pattern provided. Please note one is grayed out, this is the project we are currently working on, the highlighted, or black text, is the entry we are looking for.



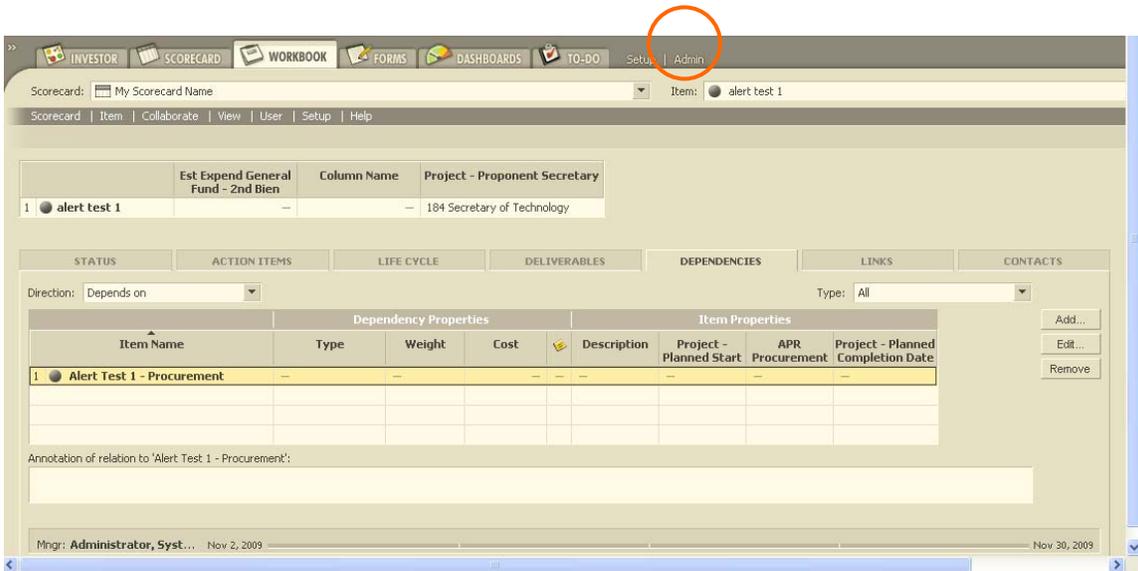
Click on the  button to apply the Action Item modifications.



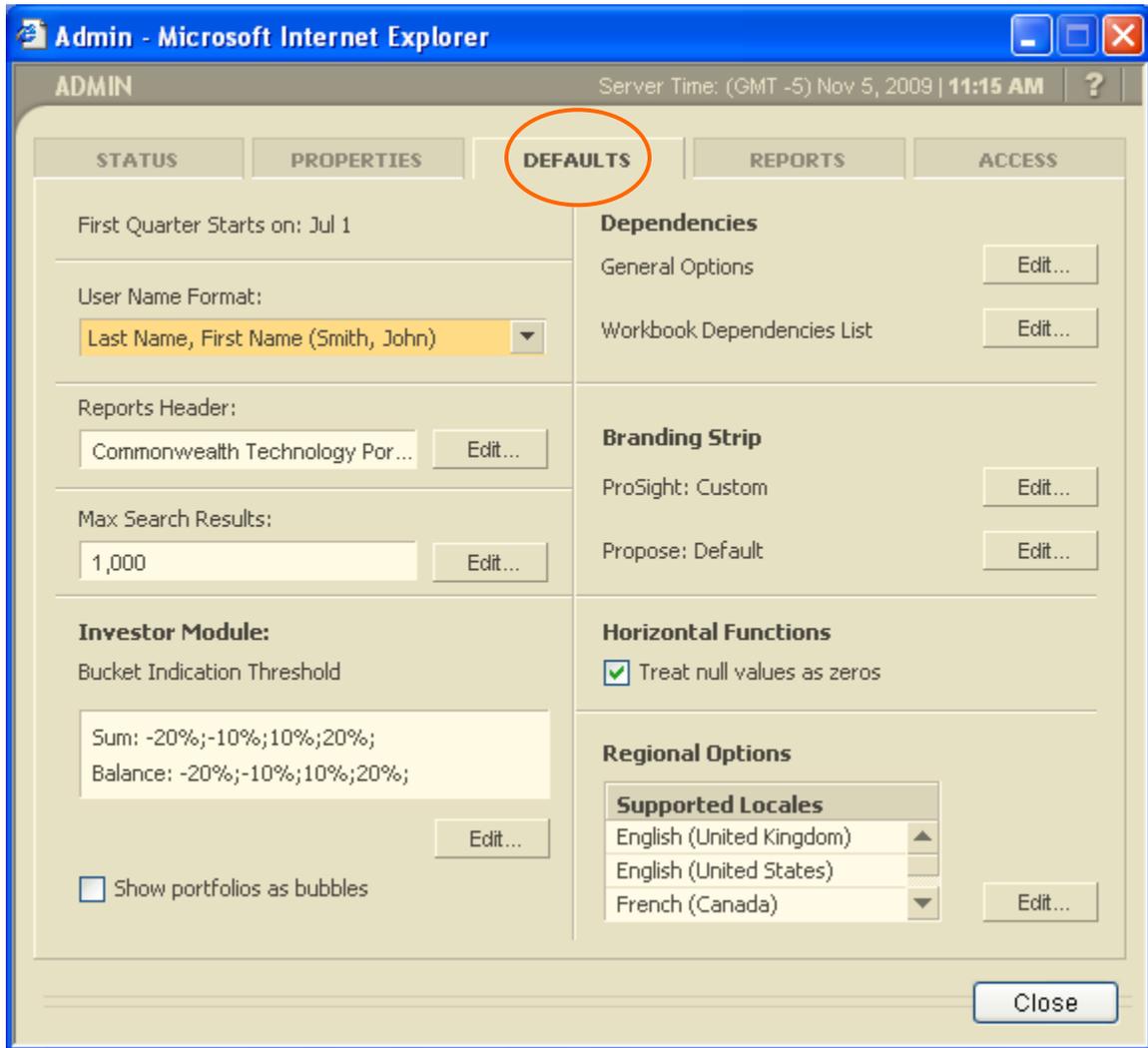
Please note, the figure below shows the cumulative affects of these actions with the addition of the highlighted dependency to the list.



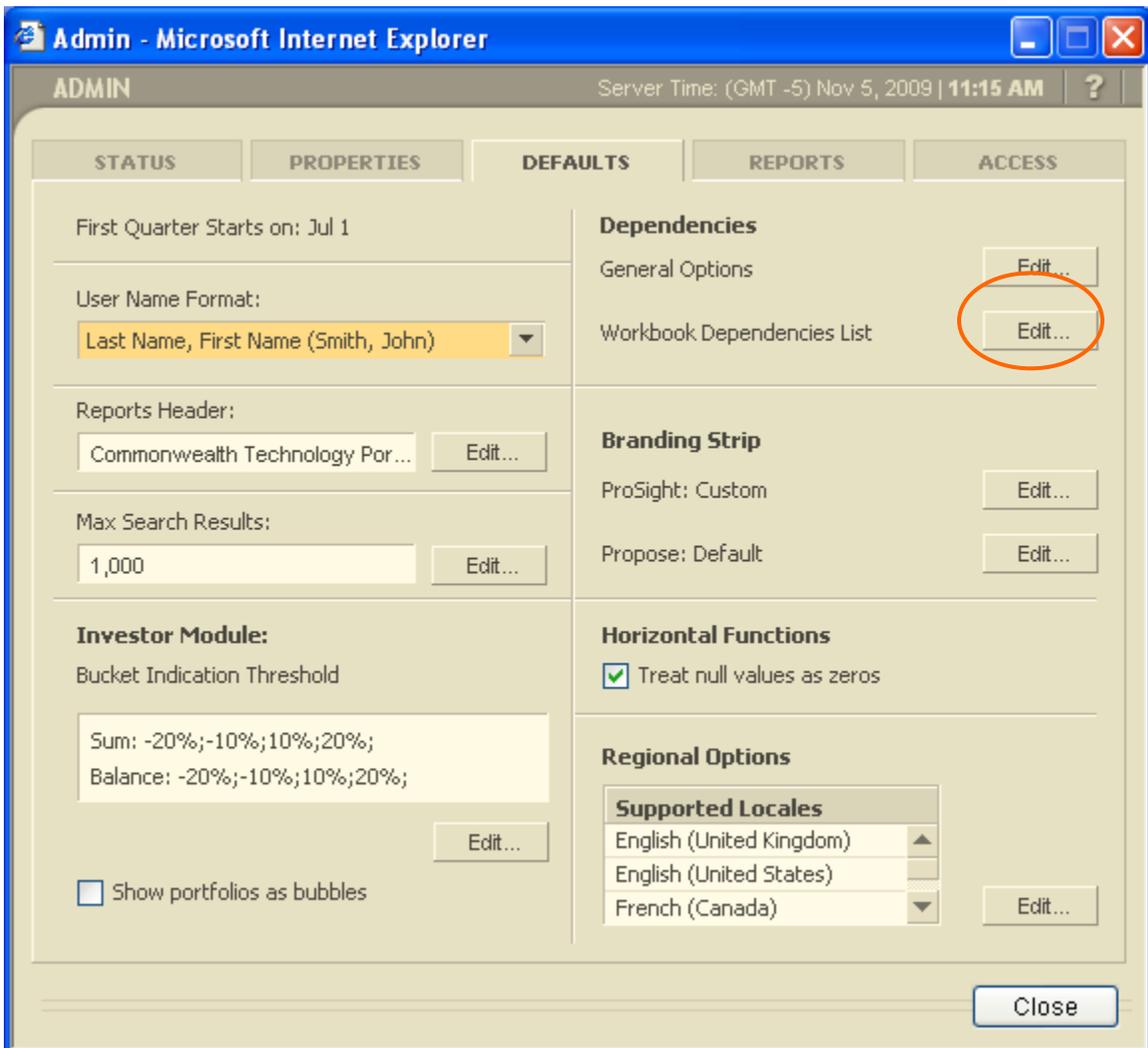
That completes our example, but there is one other part we need to introduce. It is possible to change the default dependency table format to one of your choosing. To accomplish this you will need access to the Admin capability. A word of warning is necessary; executing this change will change the default for all users. Please click on the **Admin** button as shown below.



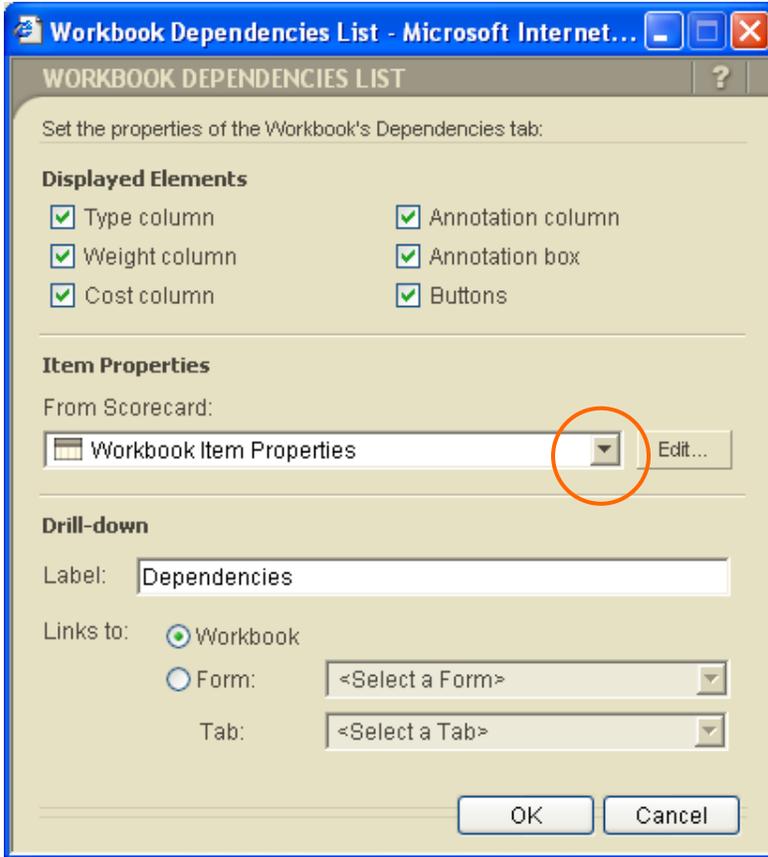
A new window will appear, please click on the **DEFAULTS** tab as shown below.



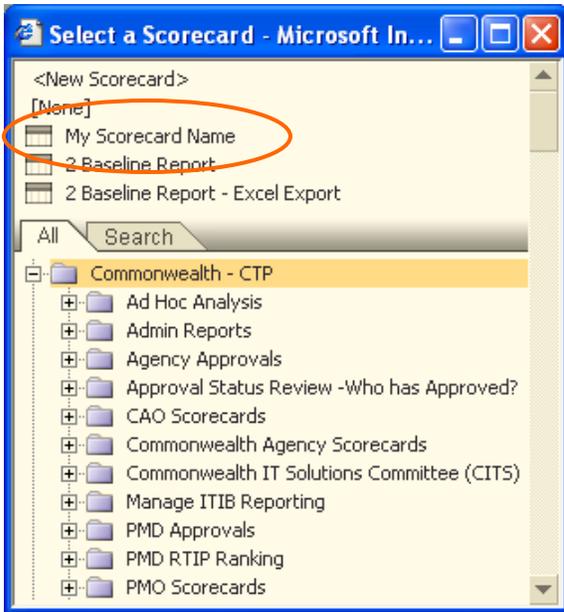
Please click on the  button as shown below.



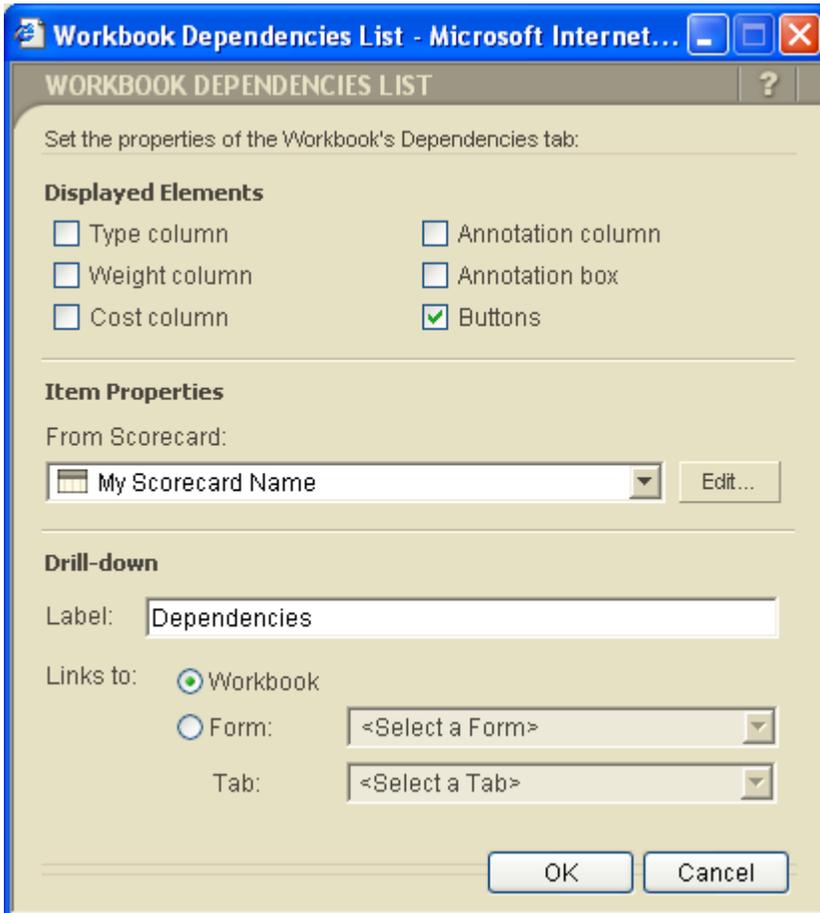
The next window you will see defines the attributes of the dependencies tab. The focus of this example is replacement of the table (i.e. Scorecard) used to display dependencies. This is accomplished by selecting the  button as shown below.

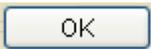


Now you can select the Scorecard you wish to use as opposed to the default. For this example we chose  My Scorecard Name , as shown below.

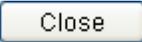


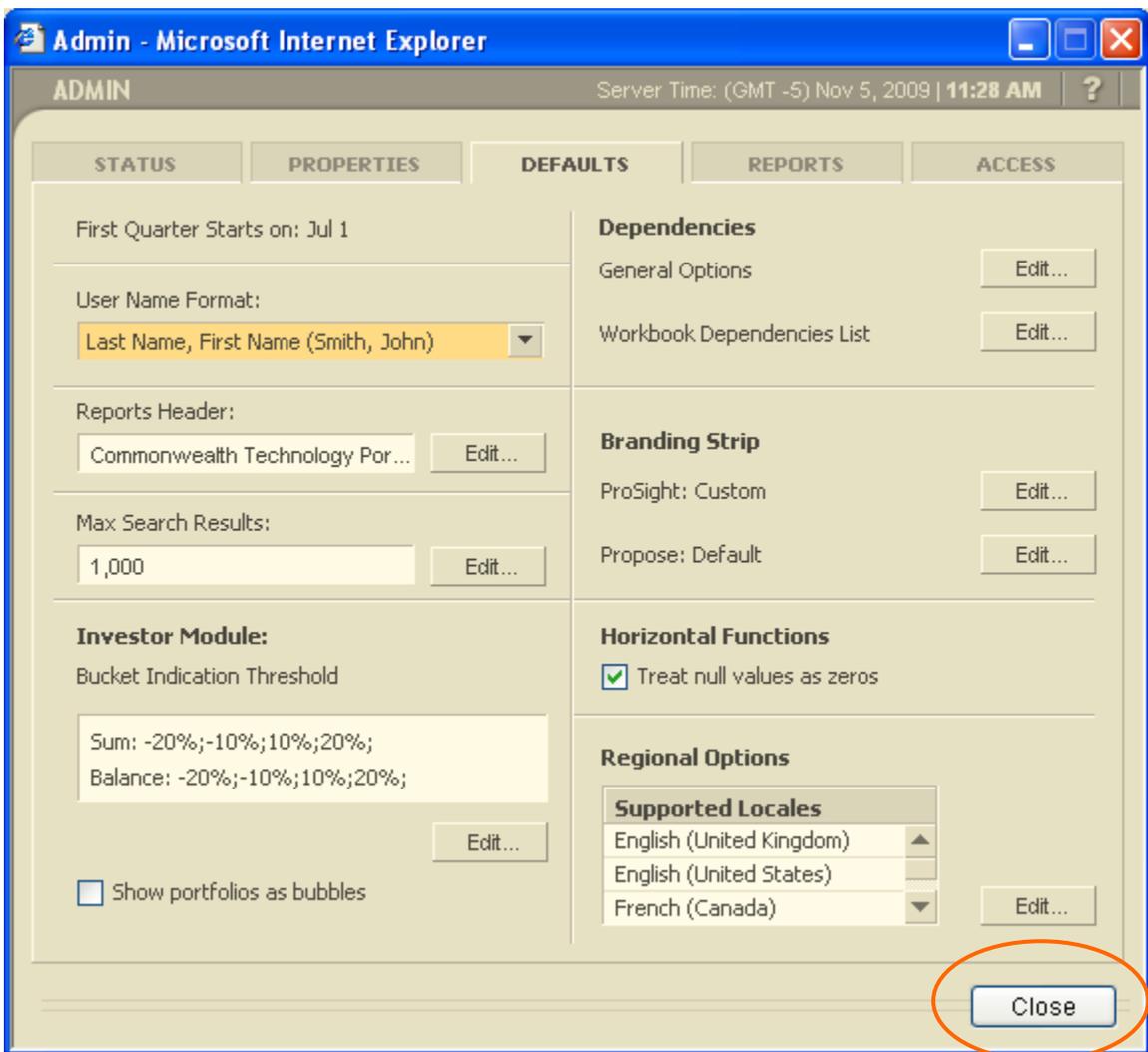
You probably noticed other selections and options are available. In this example we made a few those selections, please make selections as you see fit. Some experimentation will probably be necessary before you find a combination you are comfortable with. But be warned, all users will be forced to use the selections you have made.



Click on the  button to apply the modification.



Click the  button as shown below.



The figure below is the cumulative affect of all the changes we've made in this section. Please note the highlighted dependency because this is what we just added.

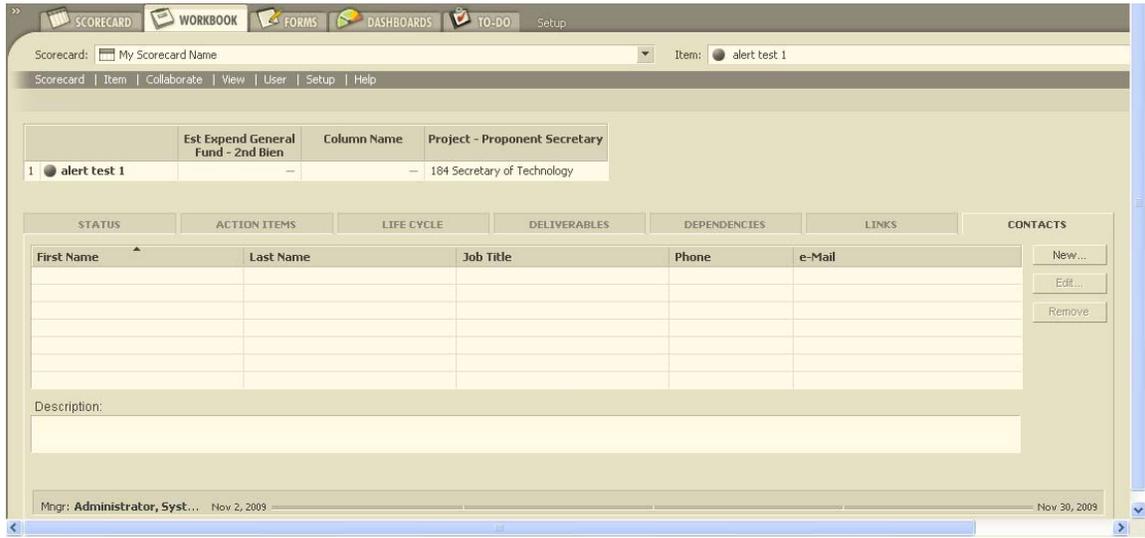
The screenshot shows a software interface with a top navigation bar containing 'INVESTOR', 'SCORECARD', 'WORKBOOK', 'FORMS', 'DASHBOARDS', and 'TO-DO'. Below this, there are tabs for 'STATUS', 'ACTION ITEMS', 'LIFE CYCLE', 'DELIVERABLES', 'DEPENDENCIES', 'LINKS', and 'CONTACTS'. The 'DEPENDENCIES' tab is active, showing a table with columns for 'Item Name', 'Est Expend General Fund -', 'Column Name', and 'Project - Proponent'. The first row of the table is highlighted in yellow and contains the following data:

Item Name	Est Expend General Fund -	Column Name	Project - Proponent
1 Alert Test 1 - Procurement	-	-	184 Secretary of ...

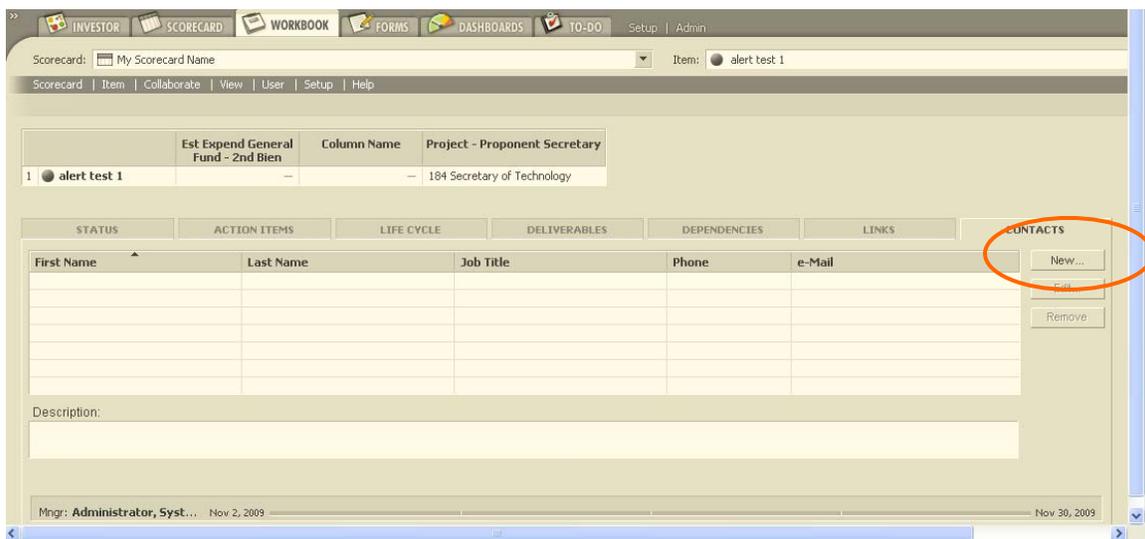
At the top of the interface, there is a 'Scorecard' section with 'My Scorecard Name' and an 'Item' dropdown set to 'alert test 1'. The 'Direction' is set to 'Depends on' and the 'Type' is set to 'All'. There are 'Add...', 'Edit...', and 'Remove' buttons to the right of the table.

## Contacts Tab

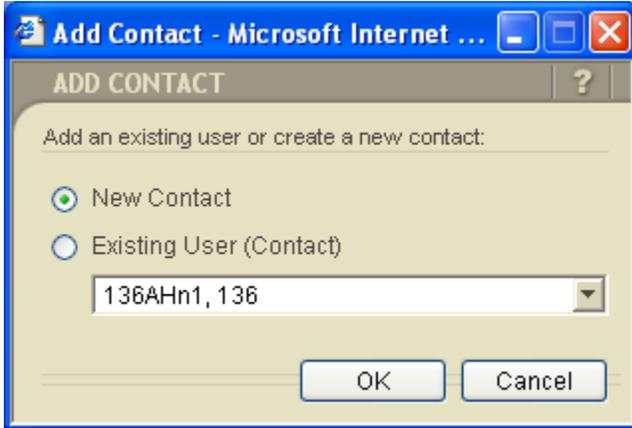
The purpose of the contacts tab is self explanatory. But the information stands alone as you can not import information from MS Exchange or any other tool. You will have to maintain the information independently from any other contacts repository.



To add a contact, click on the  button as shown below.



In this example we will be creating a new contact external to the current users defined in Primavera Portfolios. As you can see, the  New Contact option is selected by default.



Click on the  button to continue.



Next we will provide the contact information as prompt in the window below.

**CONTACT** ?

Fill in the following information:

First Name:  Last Name:

Job Title:  Phone:

Company:

Department:  Fax:

Address:  E-mail:

Description:

OK Cancel

The intent of this example is not to fill in all the contact information, only to give you an introduction to the concepts. As you can see we have provided enough information in the example below to allow us to view the end result.

CONTACT

Fill in the following information:

First Name:  Last Name:

Job Title:  Phone:

Company:

Department:  Fax:

Address:  E-mail:

Description:

OK Cancel

Click on the  button to apply the modification.



The figure below displays the cumulative affects of our efforts in this section. Please note the highlighted entry as this is the new entry we just added.

The screenshot shows a web application interface with a top navigation bar containing tabs for INVESTOR, SCORECARD, WORKBOOK, FORMS, DASHBOARDS, and TO-DO. Below the navigation bar, there are fields for 'Scorecard: My Scorecard Name' and 'Item: alert test 1'. A menu bar includes 'Scorecard | Item | Collaborate | View | User | Setup | Help'. The main content area features a table with columns: 'Est Expend General Fund - 2nd Bien', 'Column Name', and 'Project - Proponent Secretary'. The first row, labeled '1 alert test 1', is highlighted in yellow and contains a dash in the first two columns and '184 Secretary of Technology' in the third. Below this table is a 'CONTACTS' section with a table having columns: 'First Name', 'Last Name', 'Job Title', 'Phone', and 'e-Mail'. The first row of the contacts table is also highlighted in yellow and contains 'my first name', 'my last name', an empty 'Job Title' field, and the phone number '111-222-3333'. To the right of the contacts table are buttons for 'New...', 'Edit...', and 'Remove'. Below the contacts table is a text area labeled 'Description of my first name'. At the bottom of the interface, there is a status bar showing 'Mngr: Administrator, Syst...' and dates 'Nov 2, 2009' and 'Nov 30, 2009'.

## ***Wrap Up***

It is our hope you found this introduction to Workbooks instructive and helpful. The workbook module is sometimes known as 'Project Lite' in that it gives you a quick overview of the project with regards to; schedule, work effort expended, and work effort still to go. It is our hope PMD will find the Workbook module very useful.