



SIEBEL⁷
eBusiness

**SIEBEL PROJECTS USER
GUIDE**

MIDMARKET EDITION

eBUSINESS APPLICATIONS

VERSION 7.0

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Additional Documentation

The product documentation set for Siebel eBusiness Applications, Mid Market Edition is provided on the *Siebel Bookshelf, MidMarket Edition*. For general information about Siebel product documentation, see the *Siebel Bookshelf, MidMarket Edition* home page and *Documentation Roadmap, MidMarket Edition*.

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What's New in This Release

For a list of features new in this release, see the “What’s New” books included on the *Siebel Bookshelf, MidMarket Edition* CD-ROM. Your Siebel implementation may not have all the features described in those guides, depending on which software modules you have purchased.

It is also strongly recommended that you read *Fundamentals, MidMarket Edition* so that you can make optimal use of your Siebel application, especially if you are new to Siebel software.

Siebel Systems Welcomes Your Comments

To help us improve our products, we want to know about any corrections or clarifications to this guide that you would find useful. Please include in your message:

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We appreciate your feedback.

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Siebel Projects Overview

Siebel Projects was designed in consultation with leading professional services firms specifically to meet the needs of consulting and service organizations.

Siebel Projects allows companies to maximize their market potential by closing more business and providing a comprehensive solution for managing projects. Siebel Projects helps service delivery teams win more deals, deliver services on time with high quality, and accurately track resource needs, delivery dates, and revenue recognition.

Siebel Projects provides comprehensive support for the entire professional services process. Organizations use Siebel Projects to manage leads for customer engagements, define project scope, and work breakdown structures, manage resources, select and track subcontractors, manage time, expenses and, expose and resolve risks related to the project, and guarantee customer satisfaction.

Professional Services Automation Business Process

This workflow represents a typical Professional Services Business Process.

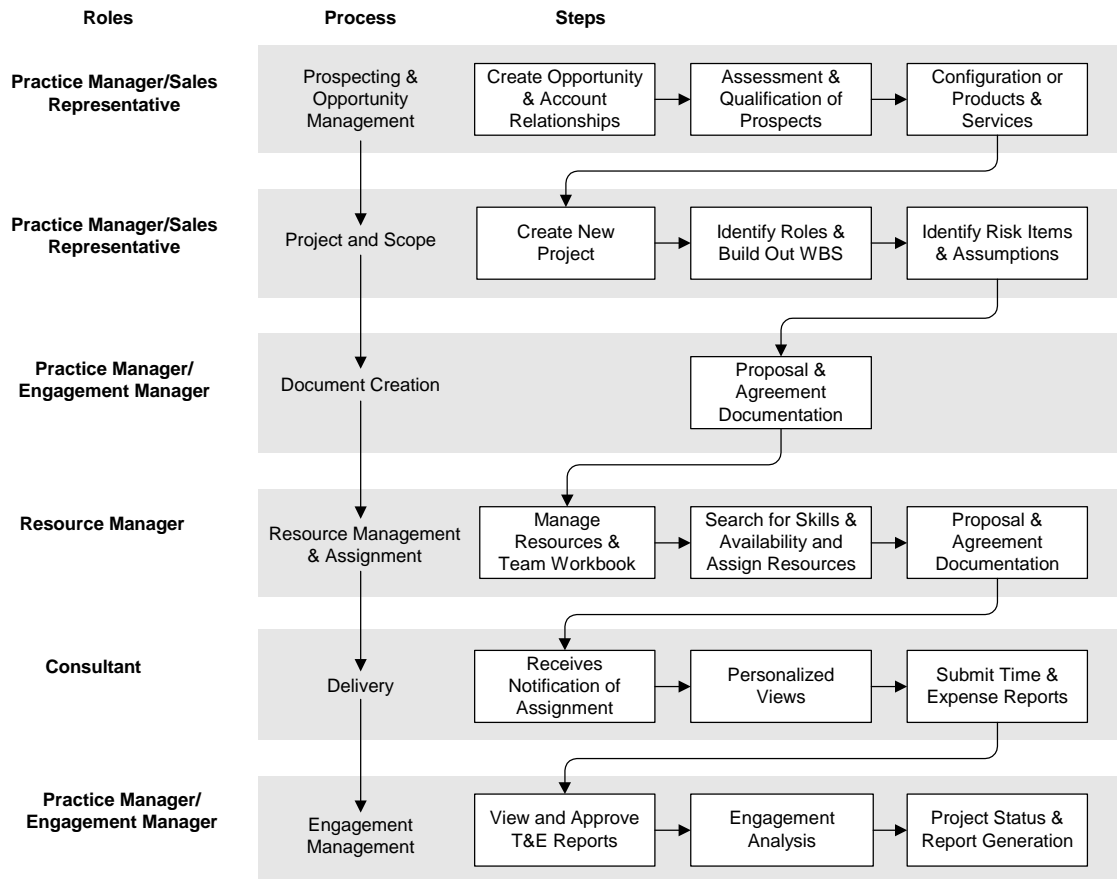


Figure 1-1. Business Process

Benefits

Siebel Projects helps professionals by providing:

- Risk Tracking and Management
- Time and Expense Reporting
- Microsoft Project Integration
- Opportunity Management
- Project Management

Roles and Responsibilities

The table below shows the sample database employees and their associated functional responsibilities. To use these logins, launch the Siebel application or Siebel Service application, choose the Sample data source, and enter the login and password shown.

Table 1-1. Roles and Responsibility Table

Functional Responsibility	Employee Name	Login/Password
Principal Consultant	Payton Singh	PSINGH
Senior Consultant	Gary Clark	GCLARK
Technical Account Manager	Ted Angel	TANGEL
Engagement Manager	Emily Modi	EMODI
Resource Manager	Randy McCoy	RMCCOY
Consultant	Serina Caine	SCAINE
System Administrator	Sys Admin	SADMIN

Opportunity Management

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Opportunities Management Overview

Opportunity Management allows engagement managers to coordinate information with sales representatives and access critical sales and customer data. Opportunity assessments create tremendous business value by allowing engagement managers to identify and focus on critical opportunities.

Business Scenario

Emily Modi, a Siebel Professional Services engagement manager, receives a call from a prospective customer. The prospective customer is interested in having Siebel Professional Services work on an opportunity. Emily enters the information about the project to help her understand and track the customer's business problems. She qualifies the project opportunity and enters project specific information such as the planned start and end date, a description, resource requirements, and whether the project is billable or not.

Opportunity Management Business Process

Role: Practice Manager/Sales Representative

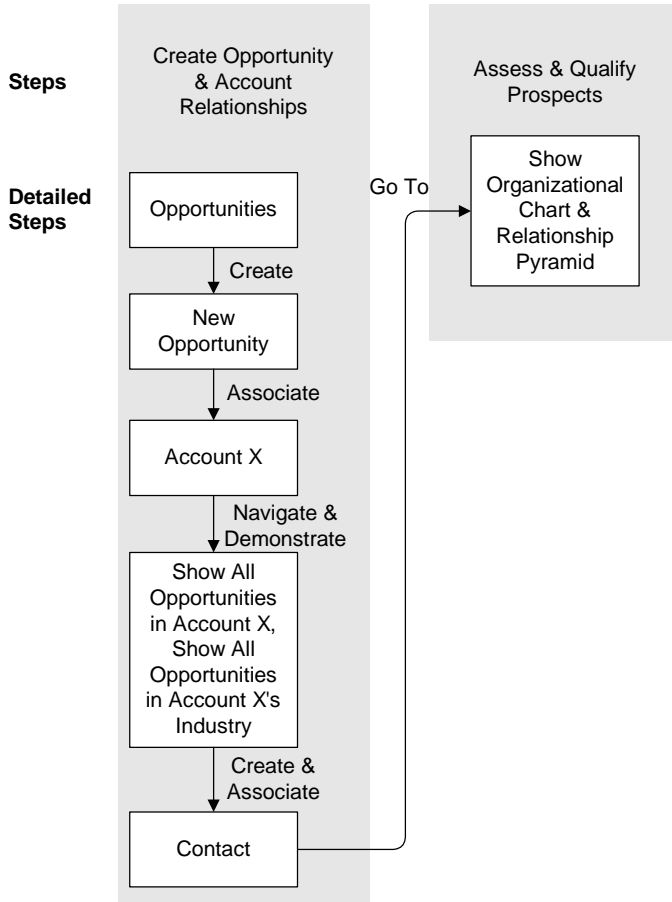


Figure 2-1. Opportunity Management Business Process

Opportunities

Opportunity Management records and tracks information relating to opportunities in the views of the Opportunities screen.

Managing Opportunities

You can access different Opportunities screen views to:

- View your own opportunities with information that may include contacts, activities, products, competitors, estimated revenue, probability of closure, and sales stage.
- View opportunities in the database.
- Enter information about new opportunities.
- Track the status of an opportunity through the sales cycle from creation to closure.
- Update information about opportunities as they move through the sales cycle.

Creating Opportunities

Every time you identify an opportunity, you will want to create a new record.

To create a new opportunity

- 1** Navigate to the Opportunities screen.
- 2** From the Show drop-down list, select My Opportunities.
- 3** In the Opportunities list, click New.
- 4** In the new row, complete the necessary fields.
- 5** Click Save.

Associating a Project with an Opportunity

Associating projects with an opportunity is critical to guarantee that sales representatives are collaborating with the proper professional services personnel to jointly develop and scope out the project to assure properly calibrated customer expectation.

To associate a project with an opportunity

- 1 Navigate to the Opportunities screen.
- 2 From the Show drop-down list, select My Opportunities.
- 3 In the Opportunities list, select the opportunity with which the project will be associated.
- 4 Click the Projects view tab.
- 5 In the Projects list, click the menu button and then click New Record.
- 6 In the new row, complete the necessary fields and then click Save.

NOTE: From this screen you will be able to add a new project but you will not be able to select a project.

Associating an Account to an Opportunity

Accounts will be a source of business for your company. An opportunity is a potential revenue-generating event and is another type of information that you can use to manage your accounts within the application.

To add an account to an opportunity

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select the account to which the opportunity will be added.
- 4 Click the Opportunities view tab.

- 5 In the Opportunities list, click New.
- 6 In the new row, complete the necessary fields and click Save.

NOTE: Sales stage selections are based upon the sales methods chosen by each individual organization.

Opportunity Contacts

As you work with an opportunity, contacts associated with the opportunity become increasingly important.

The Contacts view on the Opportunity screen allows you to track contact information obtained during the prospecting stage.

To add a contact to an opportunity

- 1 Navigate to the Opportunities screen.
- 2 From the Show drop-down list, select My Opportunities.
- 3 In the Opportunities list, select the opportunity to which a contact will be added.
- 4 Click the Contacts view tab.
- 5 In the Contacts list, click New.
- 6 From the Add Contacts dialog box, select the contact or contacts you want to add and then click OK.
- 7 Click the menu button and then click Save Record.

NOTE: You can see how contacts are related to each other organizationally in the organizational analysis view.

Organization Analysis

Knowing which products to sell is important; however, knowing who the decision makers are is just as important. They are the people who actually have the authority to make the purchase.

Organization charts are automatically created for each opportunity based on contact information for the opportunity. As contact information changes, the organization chart will immediately reflect the changes.

To add to the organization analysis

- 1 Navigate to the Opportunities screen.
- 2 From the Show drop-down list, select My Opportunities.
- 3 In the Opportunities list, select the opportunity with which the analysis will be created.
- 4 Click the Organization Analysis view tab.
- 5 In the Organization Analysis view, from the Show drop-down list, select Contacts.
- 6 In the Contacts list, click the menu button and then click New Record.
- 7 In the Add Contacts dialog box, select the contact or contacts you wish to add.

NOTE: You can select multiple contacts by holding down the shift key while selecting the contact records.

- 8 In the Contacts list, click the menu button and then click Edit Record.
- 9 In the Organization Analysis form, in the Manager Last Name field, click the select button.
- 10 In the Pick Manager dialog box, select the manager and click OK.
- 11 Click the Level of Influencer drop-down list and select the level and then click Save.

NOTE: The Manager Last Name and Level of Influencer fields need to be completed in order for the Organizational Analysis view to appear properly.

To view the Organizational Analysis

- In the Contacts list, from the Show drop-down list, select Organizational Analysis.

An Organizational chart appears with the contact information you entered.

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Project Management Overview

Project management is the process of:

- Tracking tasks
- Associating sub-tasks
- Activities
- Attachments to a project
- Tracking the status and appropriate progress of the project
- Generating project status reports for management purposes
- Administering risks that may potentially affect the outcome of the project
- Tracking and approving time, expense

Project Management Business Process

Role: Practice or Project Managers

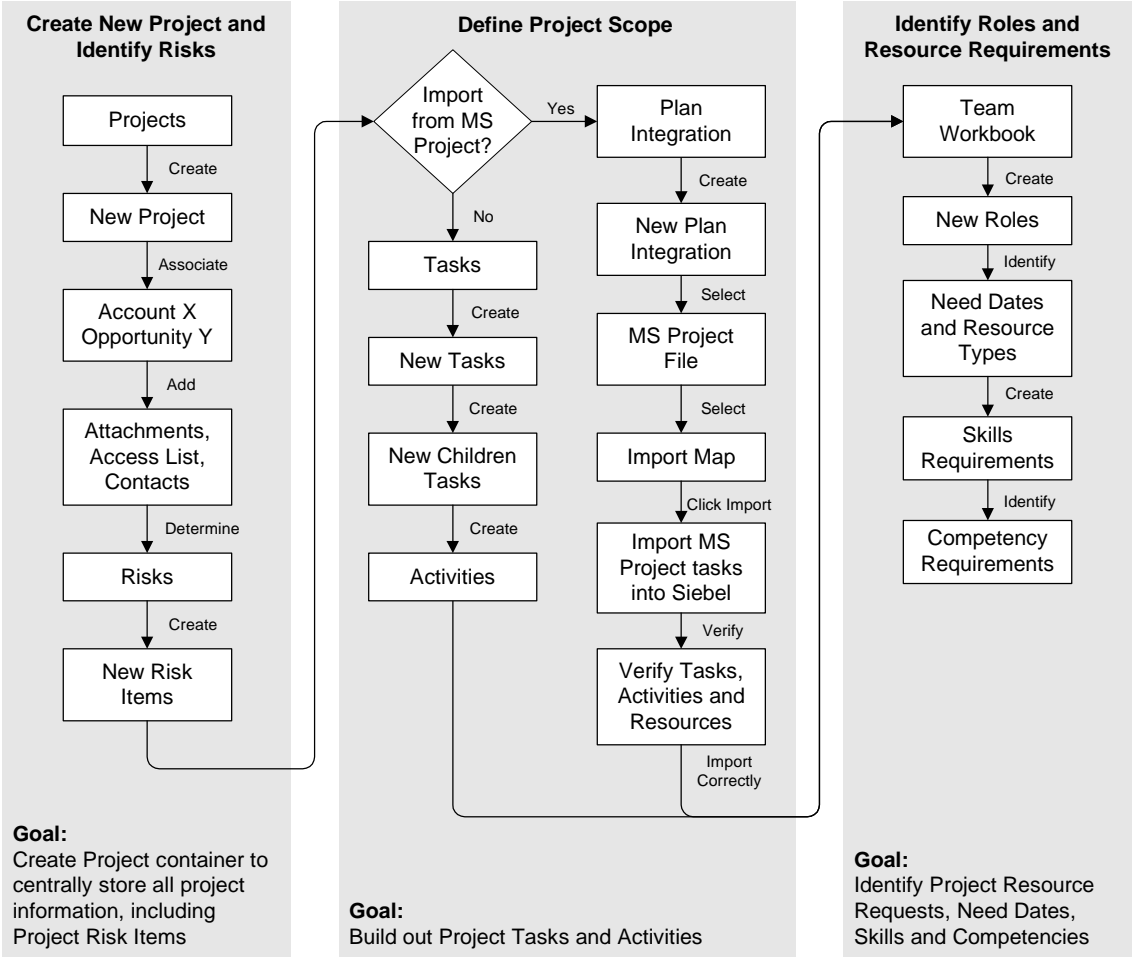


Figure 3-1. Project Management Business Process

Business Scenario

Emily Modi, an engagement manager, has been given the task of performing a global rollout and implementation for Marriott International. She is now in the process of determining the tasks or milestones that need to be completed for have a successful and profitable project. Because Emily has previously done several implementation projects, she knows there are several milestones that must be met. Emily knows that she needs to enter activities for this project and assign milestones to people on the team.

At this point, Emily breaks each milestone down to its component parts by associating tasks and activities. After creating her team workbook and securing the project delivery resources, Emily assigns the tasks and activities. She can use the tasks view to assign tasks and set expected completion dates. She is attempting to build the skeletal project plan that she will later export to Microsoft Project. By assigning tasks and activities, Emily can give the other members of her team an idea of the work each will do on the project.

As Emily's team members complete their tasks and activities, they can attach write-ups and diagrams as necessary. Because these files are embedded in the Siebel application, anyone on the team can open the files and review the work to be done on the project.

Projects

You can create projects in three different areas:

- **Projects.** As a practice or project manager, you can view and manage your projects from this screen.
- **Opportunities.** As a sales representative, you may want to create a project and fill in the preliminary information as it associates with the opportunity.
- **Accounts.** As an account manager, you may want to create a project as it pertains to an account or view.

Creating a New Project Using the Projects Screen

Practice managers are responsibilities for creating new projects and associating the relevant information to them.

To create a new project

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, click the menu button and then click New Record.
- 4 In the Projects list, complete the necessary fields and then click Save.

Monitoring Your Team's Projects

Another responsibility you have is to monitor your team's projects. This gives you insight to the status of projects.

To monitor your team's projects

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Team's Projects.
- 3 In the Projects list, drill down on the Name hyperlink.

NOTE: Managers will be able to approve time sheets and expense reports that are submitted to them through the My Team's filter.

Associating an Account with a Project

While creating a new project, it is important to associate an account with it.

To associate an account with a project

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the account will be associated.
- 4** In the Projects list, select the Account field and click the select button.
- 5** From the Pick Account dialog box, select the account and click OK.
- 6** In the Projects form, click Save.

Associating a Rate List with a Project

While you are creating a new project, it is important to associate it with a rate list. The rate list will automatically be related to a cost list. These two list will allow you to calculate your project resource margins in the Team Workbook.

To associate a rate list with a project

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the rate list will be associated.
- 4** In the More Info form, from the Rate List drop-down list, select the appropriate rate.
- 5** Click Save.

Associating an Opportunity with a Project

While you are creating a new project, it is important to associate an opportunity with it.

To associate an opportunity with a project

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the opportunity will be associated.
- 4** In the More Info form, in the opportunity field, click the select button.
- 5** In the Pick Opportunity dialog box, select the opportunity and then click OK.
- 6** Click Save.

Creating a New Project Using the Opportunities Screen

The first step in tracking projects is to create new ones. Once you create projects you can then monitor their progress.

To create a new project

- 1** Navigate to the Opportunities screen.
- 2** From the Show drop-down list, select My Opportunities.
- 3** In the Opportunities list, select the opportunity with which the project will be associated.
- 4** Click the Projects view tab.
- 5** In the Projects list, click the menu button and then click New Record.
- 6** In the new row, complete the necessary fields and then click Save.

Creating a New Project Using the Accounts Screen

The first step in tracking projects is to create new ones. Once you create projects, you can then monitor their progress.

To create a new project

- 1 Navigate to the Accounts screen.
- 2 From the Show drop-down list, select My Accounts.
- 3 In the Accounts list, select the account with which the project will be associated.
- 4 Click the Projects view tab.
- 5 In the Projects list, click the menu button and then click New Record.
- 6 In the new row, complete the necessary fields and then click Save.

Attaching a File to the Project

You can associate any attachment with a project. This is a repository that allows you to store and associate related data to a project. This keeps everyone involved in the project informed.

To attach a file

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project to which the file will be attached.
- 4 Click the Attachments view tab.
- 5 In the Attachments list, click the menu button and then click New Record.
- 6 In the Attachment Name field, click the select button.
- 7 In the Add Attachment dialog box, click Browse.
- 8 In the Choose File dialog box, select the file to attach, click Open and then click Add.
- 9 In the Attachments list, click Save.

Associating Contacts with a Project

You want to associate contacts with a project. Contacts is a repository that allows you to associate every contact related to a project. This keeps everyone on the project informed.

To associate a contact

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which the contact will be added.
- 4 In the Project list, drill down on the Name hyperlink.
- 5 In the Contacts list, click the menu button and then click New Record.
- 6 In the Add Contacts dialog box, select the contact or contacts you wish to add and then click OK.

NOTE: You can select multiple contacts by holding down the shift key while selecting the contact records.

Providing Access to a Project

You will most likely want different team members to see only their team's projects. Only people on the access list have access to the projects.

To grant access to a project

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project to which the access will be granted.
- 4 Click the Access view tab.
- 5 In the Access list, click the menu button and then click New Record.

- 6 In the Add Employees dialog box, select the employee or employees who should have access to this project and then click OK.

NOTE: You can select multiple employees by holding down the shift key while selecting the employee records.

- 7 In the Access list, click Save.

Adding Subcontractors

You want to associate subcontractors with your project, as well as make them available as part of your project team.

To add subcontractor information

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select All Projects.
- 3 In the Projects list, select the project with which the subcontractor will be associated.
- 4 Click the Subcontractors view tab.
- 5 In the Subcontractors list, click the menu button and then click New Record.
- 6 In the Account Name field, click the select button.
- 7 In the Pick Account dialog box, select the account and then click OK.
- 8 Click Save.

To associate a subcontractor resource with a project

- 1 In the Subcontractors list, drill down on the Account Name hyperlink.
- 2 In the Resources list, click the menu button and then click New Record.
- 3 In the Role field, select a role from the drop-down list.
- 4 In the new row, complete the necessary fields and then click Save.
- 5 In the Contacts list, click Save.

Querying for Qualified Resources for Your Project

Once a project has been created and you have estimated your resource needs, you can search for and add resources to the project team. You are now working on staffing your project.

A simple, but powerful, way to find qualified resources is to query on a desired skill in the Employees Query view.

NOTE: You can set up more skills in Tools, MidMarket Edition. For more information, see *Siebel Tools Reference, MidMarket Edition*.

To query for resources

- 1** From the application-level menu, choose Site Map > User Administration > Employees.
- 2** Click the Employee Query view tab.
- 3** In the Employee Query Skill list, select the skill.
- 4** In the Employee Query list, click Query.
- 5** In the Expertise field, from the drop-down list, select an expertise.
- 6** Click Go.

Use the Employee Query list to help locate the resource that fits the skills requirements for the project.
- 7** Once an employee has been located, click the Employee Availability view tab to check their availability.
- 8** Based on the information in [Step 6](#), write down the name of the resource so that you can add it to the team workbook.

Creating Activities and Tasks

If you do not have access to your team's Microsoft Project template, but still need to scope out your project, you can use the Activity Plans view to lay out your project parameters and then build your project details. Activity plans provide a set of prebuilt templates just like Microsoft Project. The template rolls out a collection of activities in a logical order based on the start date specified. You can also create activities without the aid of activity plans or Microsoft Project.

To create activities using activity plans

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the activities will be associated.
- 4** Click the Activity Plans view tab.
- 5** In the Activity Plans list, click the menu button and then click New Record.
- 6** In the Template field, select a template from the drop-down list and click Save.

The activities associated with the Activity plan appears in the Activities list subview.

To create activities manually

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the activities will be associated.
- 4** Click the Activities view tab.
- 5** In the Activities list, click the menu button and then click New Record.
- 6** In the Activities list, complete the necessary fields and then click Save.

Creating Tasks Manually

After you have added the necessary activities, you may want to group them in a logical pattern using tasks. Tasks are basically containers for groups of related activities.

To create tasks manually

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Team's Projects.
- 3** In the Projects list, select the project with which the tasks will be associated.
- 4** Click the Tasks view tab.
- 5** In the Tasks list, click the menu button and then click New Record.
- 6** In the new row, complete the necessary fields and then click Save.

To associate activities to tasks

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Team's Projects.
- 3** In the Projects list, select the project with which the tasks will be associated.
- 4** Click the Tasks view tab.
- 5** In the Tasks list, drill down on the Name hyperlink.
- 6** In the Activities list, click the menu button and then click New Record.
- 7** In the Activities list, complete the necessary fields and then click Save.

Tasks and Activities

If you are importing Microsoft Project files to create tasks and activities and they imported successfully, you can take a look at associated tasks and activities.

To view tasks

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the tasks are associated.
- 4** Click the Tasks view tab.

A listing of all imported tasks appears.

To view activities

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the activities are associated.
- 4** Click the Activities view tab.

A listing of all imported activities appears.

NOTE: For more information on how to import Microsoft Project file, refer to [Chapter 4, “Microsoft Project Integration.”](#)

Assessing Risks for a Project

One of the biggest project management challenges you will face is identifying and managing risk items. You can identify and quantify risk items early in the opportunity phase. This has several advantages, it allows you to price in the appropriate risk premium or discounts, and it gives you and the customer a clear understanding of the risks involved.

To create a risk

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Team's Projects.
The Projects list appears.
- 3 In the Projects list, select the project to which the risks will be associated.
- 4 Click the Risks view tab.
- 5 In the Risks list, click the menu button and then click New Record.
- 6 In the new row, complete the necessary fields and click Save.

NOTE: Repeat [Step 5](#) and [Step 6](#) until every risk has been added to the project. Each risk item can be tracked and reported in the status report.

To create risk resolution activities

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Team's Projects.
The Projects list appears.
- 3 In the Projects list, select the project to which the risks will be associated.
- 4 Click the Risks view tab.
- 5 In the Risks list, drill down on the Name hyperlink.
- 6 In the Resolution Activities list, click the menu button and then click New Record.
- 7 In the new row, complete the necessary fields and then click Save.

Creating a Status Report for a Project

You may want to create a project status report summarizing the project's progress, forecast, and issues. You can incorporate any project risk issues into your status report.

To create a status report

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which the status report will be associated.
- 4 Click the Status Report view tab.
- 5 In the Status Report list, click the menu button and then click New Record.
- 6 In the new row, complete the necessary fields and then click Save.

To associate risk issues with a status report

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which the status report will be associated.
- 4 Click the Status Report view tab.
- 5 In the Project Status Item subview list, click the menu button and then click New Record.
- 6 Click the Type drop-down list and select a risk.
- 7 In the Project Status Item subview list, complete the necessary fields and then click Save.

NOTE: Repeat [Step 5](#) through [Step 7](#) until you have added every risk item.

Team Workbook

When staffing a project, the project manager tracks the number of people needed on the team and the roles they will play. The team workbook helps managers create team scenarios, estimate the number of people and types of resources needed to staff the project, and manage overall resource needs of the project.

Role	User ID	Last Name	First Name	Start	End	Effective Rate	Total Estimated H	Total Rate	Assignme
Program Manager						\$0.00			Requested-Full
Developer	CCOHEN	Cohen	Cairo			\$200.00			Requested-Full
						\$0.00	0	\$0.00	

Figure 3-2. Team Workbooks View

Organizing the Project Staff

You will organize your projecting using the Team Workbook. Those tasks are as follows:

- 1 Estimating Resource Needs
- 2 Setting Project Rates and Schedules
- 3 Identify Resource Need Dates, Skills and Competencies requirements in the Team Workbooks view
- 4 Overall Project Resource Management

Setting Up a Project Team Workbook

The Team Workbook maintains resource information for the project. It identifies required roles, skills, and competencies associated with those roles as well as time commitments.

To identify roles for the team workbook

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which the Team Workbook will be associated.
- 4 Click the Team Workbook view tab.
- 5 In the Team Workbook list, click the menu button and then click New Record.
- 6 In the new row, complete the necessary fields and then click Save.

NOTE: It is very important that you complete the Role and Start/End Date fields. Repeat [Step 5](#) and [Step 6](#) until you have added every role.

Adding Skills and Competencies

After you have added a role to the Team Workbook, you will want to associate skills and competencies with that role. This is also an easy way of assigning people and populating their positions through the team workbook.

To add skills

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which the Team Workbook will be associated.
- 4 Click the Team Workbook view tab.
- 5 In the Team Workbook list, select the role to which the skills will be added.

- 6** In the Skills subview list, click the menu button and then click New Record.
- 7** In the new row, select a skill from the skill drop-down list and then click Save.

NOTE: Repeat [Step 5 on page 3-18](#) through [Step 7](#) for each new skill.

To add competencies

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the Team Workbook will be associated.
- 4** Click the Team Workbook view tab.
- 5** In the Team Workbook list, select the role to which competencies will be added.
- 6** In the Skills list, select the skill to which the competencies will be added.
- 7** In the Competencies subview list, click the menu button and then click New Record.
- 8** In the new row, select a Language Code and Expertise Level from the drop-down list and then click Save.

NOTE: Repeat [Step 5](#) through [Step 8](#) for each new competency.

Microsoft Project Integration

4

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Microsoft Project Integration Overview

Microsoft Project Integration allows team leaders to track tasks and activities and to share them with their project team. Team members can view their assigned activities and update the status on these activities. They can also include these activities in their time sheets and expense reports automatically. Team leaders can import activity and requirement status to their Microsoft Project to make sure the plan is up to date and can use Microsoft Project's tools to modify their project plan. Partners and team leaders can access project status to gain an immediate insight on a project's status, requirement completion, and cost.

Business Scenario

Emily Modi, the engagement manager, may choose to use Microsoft Project to initially outline and define projects. A typical project outline during the project definition phase may include major milestones, due dates, deadline, key tasks, and work breakdown structures (WBS).

After the project has been defined in Microsoft Project, the project can be imported from a Microsoft Project file into the Siebel application and resource assignments can be made to the project. By using plan integration, the project manager can select a data map to import the necessary project information from Microsoft Project into the Siebel application.

When initiating a project, a project manager may choose to export project information back to Microsoft Project from the Siebel application to reflect updates, such as percent complete or resource assignments. By using plan integration, the project manager can select a data map and apply an export filter to export the necessary project information to Microsoft Project.

Mapping Templates

There are five Mapping Templates you can use from when preparing to import or export your Microsoft Project information into your Siebel application. They are:

- **Resources Only.** This template imports Microsoft Project resources into the Projects screen, Team Workbook view as Siebel roles.
- **Activities Only.** This template imports Microsoft Project tasks and summary tasks into the Projects screen, Activities view as Siebel activities.
- **Standard.** This template imports Microsoft Project resources into the Projects screen, Team Workbooks view as Siebel roles. It also imports Microsoft Project tasks into the Projects screen, Activities view as Siebel activities and Microsoft Project summary tasks into the Projects screen, Tasks view as Siebel tasks.
- **Tasks Only.** This template imports Microsoft Project tasks and summary tasks into the Projects screen, Tasks view as Siebel tasks.
- **Tasks and Activities Only.** This template imports Microsoft Project tasks into the Projects screen, Activities as Siebel activities and Microsoft Project summary tasks into the Projects screen, Tasks view as Siebel tasks.

Mapping Filters—Exporting

In addition to the mapping templates, Siebel provides four filters that can be applied to the export maps to further refine the data being imported. They are:

- **Activity Resource Filter.** This allows for the import of specific resource activities. For example, import each activity associated with John Smith.
- **Activity Type Filter.** This allows for the import of a specific type of activity. For example, import each activity with the type equal to milestone.
- **Task Resource Filter.** This allows for the import of specific resource types. For example, import each task associated with John Smith.
- **Task Type Filter.** This allows for the import of a specific type of task. For example, import each task with the type equal to deliverable.

Microsoft Project Business Process

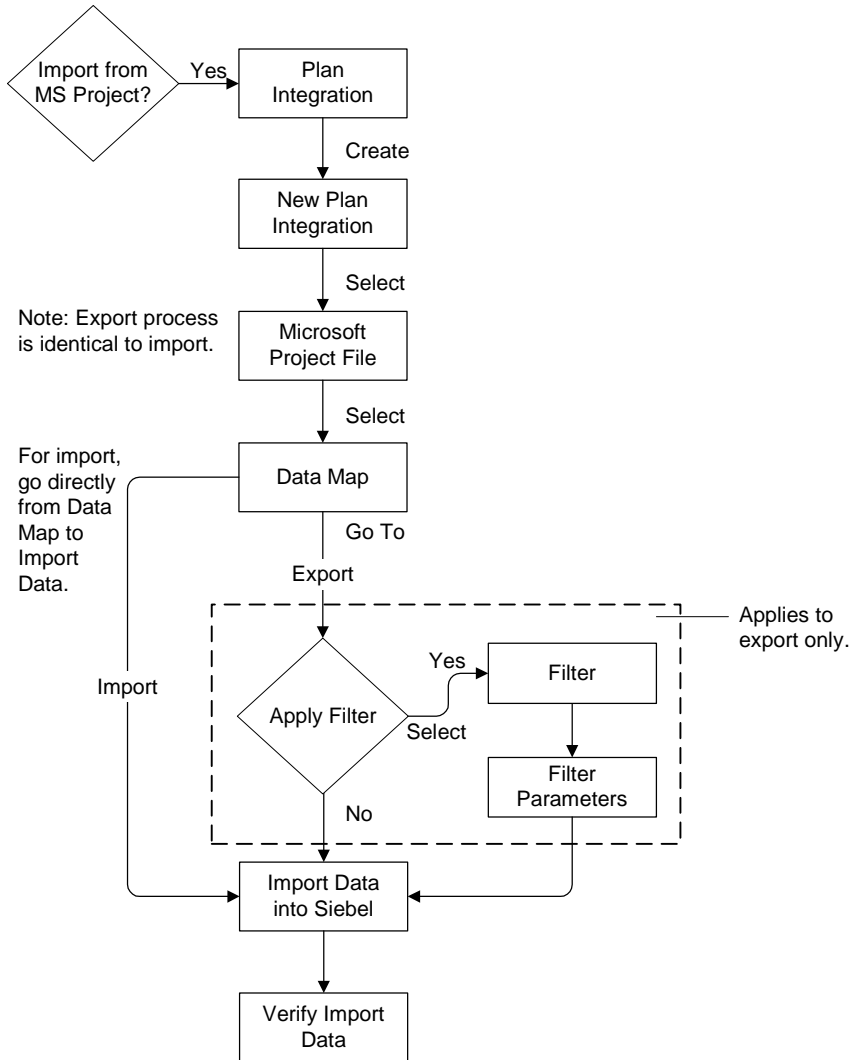


Figure 4-1. Microsoft Project Business Process

Plan Integration

Plan integration allows you to exchange data from Microsoft Project files using many different prebuilt data maps. Customers can also build their own data maps using the Project Mapping function. The data exchange process is intuitive and allows users to reuse a project's best practices and knowledge.

To create a new plan integration to import a Microsoft Project file

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project to which the file will be exchanged.
- 4** Click the Plan Integration view tab.
- 5** In the Plan Integration list, click the menu button and then click New Record.
- 6** In the Attachment Name field, click the select button.
- 7** In the Add Attachment dialog box, click Browse.
- 8** In the Choose File dialog box, select the Microsoft Project file that you want to import and click Open.
- 9** In the Add Attachment dialog box, click Add.
- 10** In the Plan Integration list, in the Mapping Template field, click the select button.
- 11** In the Pick Microsoft Project Mapping dialog box, select the data exchange map that you want to use and then click OK.
- 12** Click Save.
- 13** In the Plan Integration list, click Import.

To create a new plan integration to export to a Microsoft Project file

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project to which the file will be exchanged.
- 4** Click the Plan Integration view tab.
- 5** In the Plan Integration list, click the menu button and then click New Record.
- 6** In the Attachment Name field, click the select button.
- 7** In the Add Attachment dialog box, click Browse.
- 8** In the Choose File dialog box, select the Microsoft Project file that you want to export and click Open.
- 9** In the Add Attachment dialog box, click Add.
- 10** In the Plan Integration list, in the Mapping Template field, click the select button.
- 11** In the Pick Microsoft Project Mapping dialog box, select the data exchange map that you want to use and then click OK.
- 12** Click Save.
- 13** In the Activity Filter and Task Filter fields, click the select button.
- 14** In the Filter dialog box, select the filters you want to use and then click Save.
- 15** In the Plan Integration list, click Export.

Microsoft Project

During the delivery of a project, you may decide to exchange project information between your Siebel application and Microsoft Project. Typically, a project is created in Microsoft Project and imported into the Siebel application for resource assignment or time and expense entries. After resource assignments have been made and time and expense entries collected, project data is exported to Microsoft Project for rescheduling and progress updates.

Several important constraints need to be considered when importing or exporting Microsoft Project data into or out of your Siebel application. They are:

- **List of Values.** (LOVs) These must be reflected identically in Microsoft Project.
- **Resources.** Resources in Microsoft Project must be reflected in Siebel's employee list.
- **Configuration.** Not all fields in Microsoft Project can be imported or exported without configuration in Siebel Tools.

NOTE: For additional information on importing or exporting data between Microsoft Project and your Siebel application, refer to the Data Administration and Project Mapping section in *Applications Administration Guide, MidMarket Edition*.

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Time Sheets Overview

Proper use of a person's time is one of the most important metrics. More and more customers require detailed time reporting to help detect and eliminate inefficiencies. Time Sheets tracks time units of activities performed, allowing management to better understand when work on each activity has been completed and therefore allows them to adjust resource scheduling to help keep projects and tasks on target. With time sheets sales managers will be able to measure the cost of sales, call center managers will have better insight into where the call center agents are spending their time, customer service agents can track different classes of time on an activity, and professional services managers can track the actual time spent versus the budgeted time on an activity or task.

Business Scenario

Payton Singh, a consultant at Siebel Global Services, shows up for work on Monday morning and reviews the tasks he is assigned for the day in the My Activities filters of the Activities screen. He takes a closer look at the tasks due today and early in the week and begins work on his first task.

As Payton works on each activity throughout the day, he logs the number of hours or minutes spent as individual records associated to the activity. Payton can track the individual time units he works on each activity and can have the total time for the activity automatically aggregated to the duration field of the activity. Each one of the time tracking records can be marked as billable and can be included on his time sheet. Payton may also have some time to spend on an activity that is not billed to the customer, but may be included on the time sheet to account for his time.

At the end of the week, it is time for Payton to create and submit his time sheet. He can click Auto Time Sheet and a time sheet is automatically created for him based on time records that have been entered for his activities. He then navigates to the newly created time sheet and drills down on the Name field to get the Line Items view. There he will see a list of the days included for the time sheet along with time details that make up the billable and non-billable totals for that day.

Upon completing the review of his time sheet, Payton set the status of the time sheet to Submitted and he is sure his manager will see the submitted sheet in the Approvals view.

Payton's manager, Emily, goes to the Time Sheet Approval filter to see which time sheets have been submitted. She locates Payton's time sheet and after looking at the details, Emily approves the time sheet and the time sheet is now ready to go to the billing department.

Time Sheets Business Process

Time Sheet Flow Chart

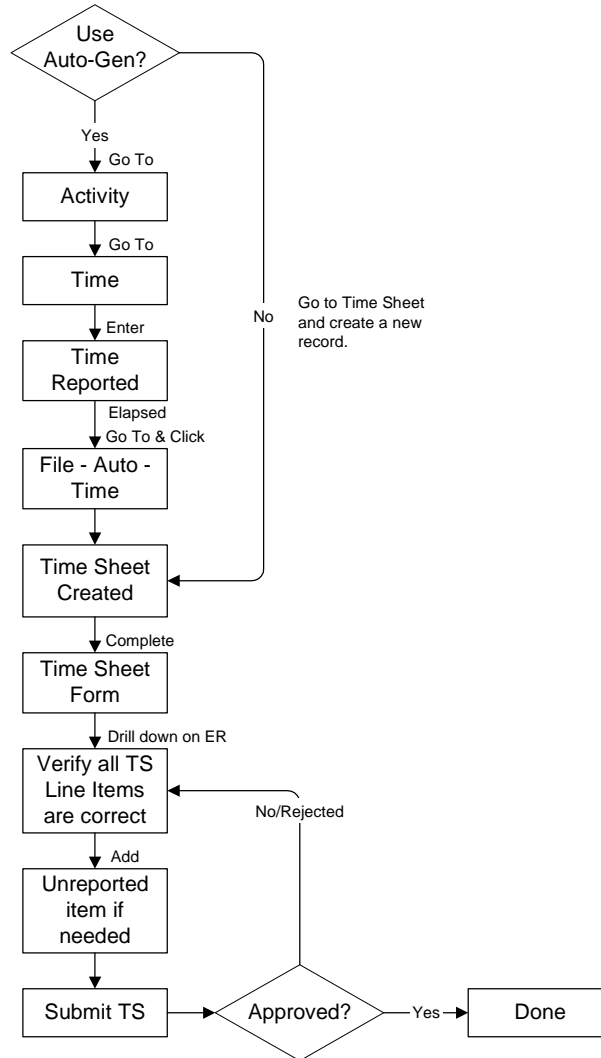


Figure 5-1. Time Sheets Business Process

Time Sheets

Time sheets allow users to associate time entered with a specific project.

Creating Time Sheets

To create a time sheet

- 1 Navigate to the Time Sheets screen.
- 2 From the Show drop-down list, select My Time Sheets.
- 3 In the Time Sheets list, click the menu button and then click New Record.
- 4 In the new row, complete the necessary fields and then click Save.

NOTE: Although defaults are chosen for various fields, the user can override these defaults in the Line Items view.

Daily Hours

After a time sheet has been created, you will need to update the hours spent on your various projects so that the appropriate charges can be accessed back to the customer.

To input daily hours into a time sheet

- 1 Navigate to the Time Sheets screen.
- 2 From the Show drop-down list, select My Time Sheets.
- 3 In the Time Sheets list, select the time sheet with which hours will be associated.
- 4 Drill down on the Name hyperlink.

The Line Items, Daily Hours, and Unreported Time lists appear.

- 5 In the Line Items list, select the day with which hours will be associated.

- 6** In the Daily Hours list, click the menu button and then click New Record.
- 7** In the Daily Hours list, report your hours, complete the necessary fields and then click Save.

NOTE: To add additional days and hours, repeat [Step 5 on page 5-5](#) through [Step 7](#) until you have entered all days and hours. The totals represented on the time sheet will reflect of both billable and nonbillable time.

Unreported Time

When filling out your daily hours, you have the option of not reporting time for charge back to the customer. Unreported time will show up in the Unreported Time list when you:

- Do not run AutoGen, each item you have associated with an activity will appear under Unreported Items
- Activity time falls outside the AutoGen period

To promote unreported time to daily hours

- 1** Navigate to the Time Sheets screen.
- 2** From the Show drop-down list, select My Time Sheets.
- 3** In the Time Sheets list, select the time sheet with which hours will be associated.
- 4** Drill down on the Name hyperlink.

The Line Items, Daily Hours, and Unreported Time lists appear.

- 5** In the Unreported Time list, select the item that will now be reported.

- 6 Click the Add to Line button.

Time will be removed from the Unreported Time list and be added to the Daily Hours list.

NOTE: The totals that are represented on your timesheet reflect of both billable and nonbillable hours. Only the owner or the preparer will be able to see records in the Unreported Time list. Managers will be able to see the list but it will not display any records.

Activity Time

Siebel Projects tracks time down to the activity level. Within the Activities view, you can drill down on the activity and enter the appropriate time associated with that activity. The AutoGen feature is used to automatically populate entered data into the appropriate time sheet. This process significantly reduces unproductive time and guesswork.

To enter activity time

- 1 Navigate to the Activities screen.
- 2 From the Show drop-down list, select My Activities.
- 3 In the Activities list, select the activity with which the expenses will be added.
- 4 Click the Time view tab.
- 5 In the Time list, click the menu button then click New Record.
- 6 In the new row, complete the necessary fields and click Save.

Auto Time Sheet

The automatic generation of time sheets gives you a way to track time while doing activity management through the Auto Time Sheet feature.

To create a time sheet automatically

- 1** Navigate to the Activities screen.
- 2** From the Show drop-down list, select My Activities.
- 3** In the Activities list, select the Activity with which the expenses will be associated.
- 4** Click on the Time view tab.
- 5** In the Time list, click the menu button and then click New Record.
- 6** In the new row, complete the necessary fields and then click Save.
- 7** From the application-level menu, choose File > Auto > Timesheet.

AutoGen is invoked and takes you to the Time Sheets screen where you can make additional edits in the More Info form if necessary.

AutoGen

For AutoGen to work properly, you must complete the time sheet with the time period reported plus 3 calendar days. Otherwise, you must input your information manually through the Time Sheets screen.

AutoGen will only add activity time items to a time sheet that has not been submitted, rejected, approved, or accepted. If a time sheet for the AutoGen period does not exist, AutoGen will create one. If a time sheet for the AutoGen period exists and is in the In Progress status, then AutoGen will add the line items into the time sheet.

For time sheet items that are created in activity time, but did not get captured by AutoGen, they will be displayed in the Unreported Items subview of the Report Line Items view.

AutoGen Process

AutoGen works in the following manner:

- It finds the current open time reporting period of type week.
- It then checks to see if you have time report with a status of “In Progress” for the current period. If you do not have a report “In Progress,” you will want to create a new report and set the period to the current reporting period.
- It will then cycle through each day and associate the time line units with the appropriate day in the time sheet.

Submitting a Time Sheet

After a Time Sheet has been created and the line items added, you can edit it if necessary (as many times as needed) until you submit the time sheet.

When an time sheet is submitted, it is automatically routed to the approver for evaluation.

Each submitted report is either approved or rejected by the approver. If the report is accepted, it is routed to the financial department where the charges are sent by invoice to the customer for payment. The status will change to accepted.

To submit a time sheet

- 1** Navigate to the Time Sheets screen.
- 2** From the Show drop-down list, select My Time Sheets.
The Time Sheets list appears.
- 3** In the More Info form, click the Status drop-down list and select Submitted and click Save.

If your time sheet is rejected, you need to go back into the Time Sheets screen, make the necessary changes, then resubmit it.

NOTE: The Submitted To, Owner and Prepare of a time sheet has the ability to change the Submit To field.

To resubmit a time sheet

- 1** Navigate to the Time Sheets screen.
- 2** From the Show drop-down list, select My Time Sheets.
- 3** In the Time Sheets list, change the status field from Rejected to In Progress.
- 4** Click the Line Items view tab.
- 5** In the Line Items, Daily Hours, or Unreported Items lists, make the necessary changes and then click Save.
- 6** In the Detail form, click the Status drop-down list, select Submitted and then click Save.

Monitoring the Status

After you have submitted your time sheet, the application uses email to notify both you and your manager of its progress.

For example, when you submit your time sheet to your manager, the manager receives an email informing them that there is a time sheet waiting for approval.

Likewise, when the manager has approved or rejected the time sheet, you receive email notification.

Another example is if you send your time sheet for approval, but your manager is out of the office, you are notified of this and you can go back into your time sheet and resubmit it to another manager.

Printing a Time Sheet

You can print time sheets from the Reports menu.

To print a time sheet

- 1** Navigate to the Time Sheets screen.
- 2** From the Show drop-down list, select My Time Sheets.
- 3** In the Time Sheets list, locate the time sheet to which you wish to run the report.
- 4** From the application-level menu, choose View > Reports.
- 5** From the Reports dialog box, select Time Sheets from the drop-down list.
- 6** Click Run.

The application generates your time sheet.

Approving Time Sheets

You are responsible, as a manager, to check your team's time sheets and either approve or reject them based on the information.

To approve a time sheet

- 1** Navigate to the Time Sheets screen.
- 2** From the Show drop-down list, select Time Sheet Approval.
- 3** In the Time Sheets list, select the time sheet to approve.
- 4** In the Time Sheets list, click the Status drop-down arrow, and select Approved and then click Save.

NOTE: To reject a time sheet, follow the same instructions, except pick Rejected from the Status drop-down list.

Time Sheet Adjustment

As the manager, there may be times when a time sheet has been submitted but then needs adjustment. These adjustments are necessary so that the correct information is collected, processed, and billed adequately to the customer.

To make an time sheet adjustment

- 1** Navigate to the Projects screen.
- 2** In the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the time sheet was associated.
- 4** Click the Time & Expense view tab.
- 5** In the Time & Expense list, from the Show drop-down list, select Time Adjustments.
- 6** In the Time & Expense list, select the time sheet that needs to be adjusted.
- 7** In the Adjusted Hours field, click the select button.

- 8 In the Adjusted Hours dialog box, click New.
- 9 In the Hours field, adjust the time as necessary and then click Save.
- 10 In the Adjusted Hours dialog box, click Close.

The Total Adjustment, Billable Hours, and Billable Amount fields are updated to reflect your adjustments.

Time Sheet Adjustments Chart

You can see a graphical representation of the adjustments made using the Time Sheet Adjustments chart.

You can also modify the way the data is represented by using the Show drop-down boxes to change the information.

You can also move the mouse over the different bars to get additional information on a particular employee.

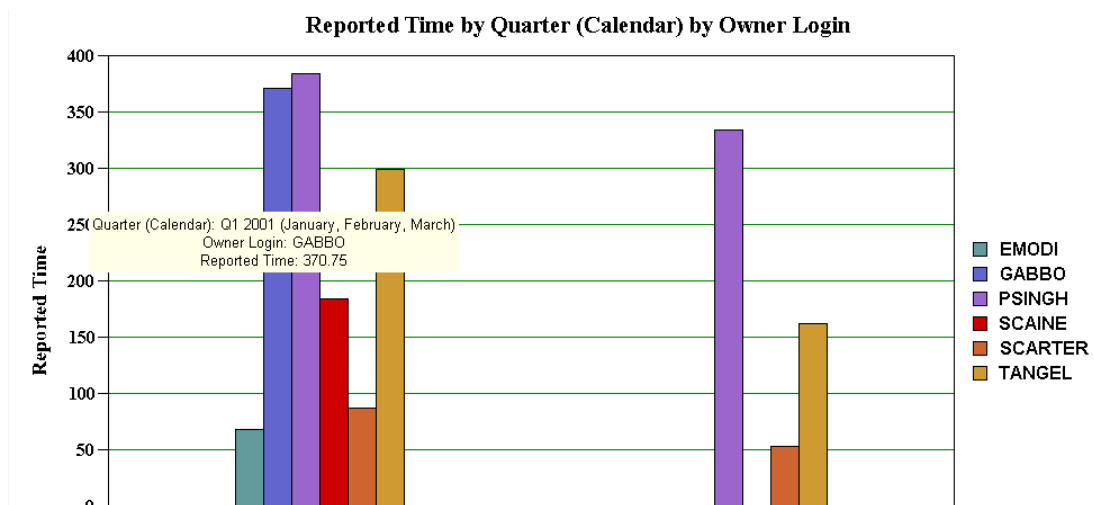


Figure 5-2. Time Sheet Adjustment Chart

Time Sheet Summary

The Time Sheet Summary view can give you an overall perspective of hours spent on a particular project.

To view time sheet summary information

- 1 Navigate to the Projects screen.
- 2 From the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which time sheet information is associated.
- 4 Click the Time & Expenses view tab.
- 5 In the Time & Expense list, from the Show drop-down list, select Time Summary.

The information on the Time Summary list shows you the reported hours for each time sheet. To view additional information, drill down on the Time Sheet Name hyperlink.

Employee	Time Sheet Name	Time Sheet #	Date	Reported Hours	Rate	Reported Fees
FROBERTS	3COM software upg 1-1ULM3		10/3/01	4	\$0.00	\$0.00
FROBERTS	3COM software upg 1-1ULM3		9/30/01	8	\$0.00	\$0.00
				12	\$0.00	\$0.00

Figure 5-3. Time Summary List

Time Sheet Summary Chart

You can see a graphical representation of the cumulative hours worked on a project using the Time Sheet Summary Chart.

You can modify the way the data is represented by using the Show drop-down boxes to change the information.

You can move the mouse over the different bars to get additional information on hours logged by a particular employee.

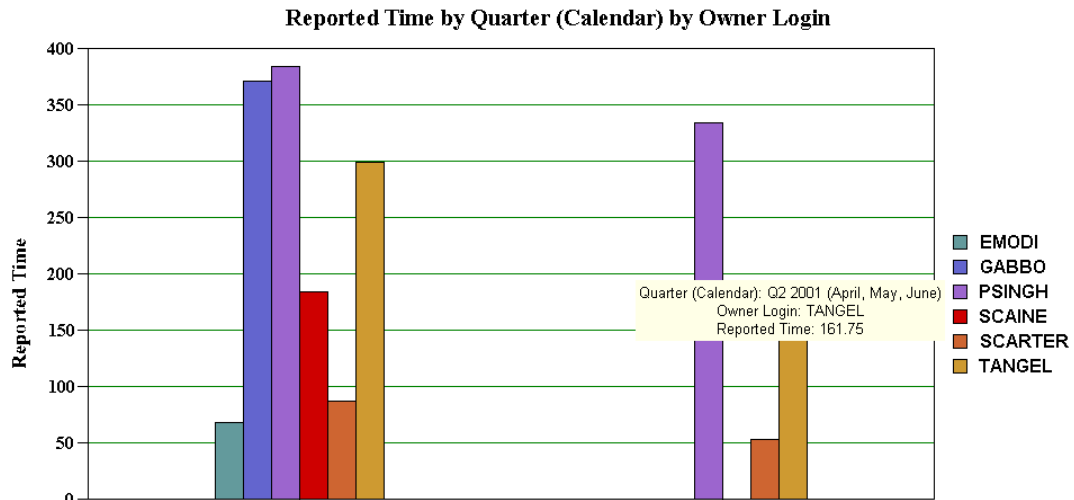


Figure 5-4. Time Sheet Summary Chart

Time Sheets

Approving Time Sheets

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Expense Reporting Overview

Expense reporting helps you streamline the expense reimbursement process by eliminating the manual, error-prone, and time consuming task of completing the necessary forms. Expense reporting prepares expense reports electronically, which helps guarantee that you are reimbursed for your expenses. It also handles complex currency conversions to accommodate business needs that take you out of the country.

Business Scenario

Emily has finished her project at Marriott International and is back in her office waiting for her next assignment. Before being reassigned, however, Emily needs to complete an expense report for the business expenses she incurred at Marriott. By doing so, her company can bill back Emily's materials, and Emily can get reimbursed for her expenses.

Emily will complete an expense report from her application for this project, and she can then submit it electronically to her manager for approval. Once approved, it can be routed to the finance department. Emily is reimbursed and Marriott International is charged for Emily's services.

Expense Reporting Business Process

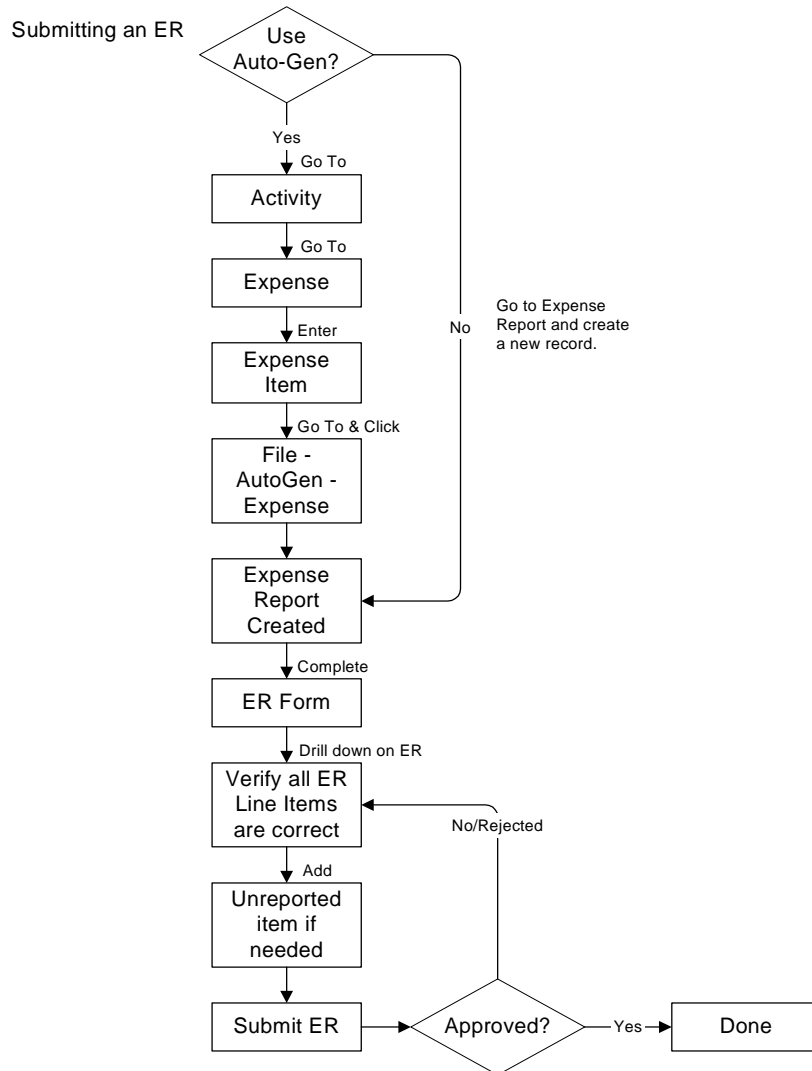


Figure 6-1. Expense Reporting Business Process

Expense Reports

Expense reports allow you to:

- Complete expense reports quickly and easily
- Track expense in multiple currencies
- Track the status of a submitted expense report
- Capture special kinds of expenses such as hotel stays and mileage
- Track the actual cost of a project
- Streamline export to accounts payable for payment

Creating an Expense Reports

After incurring business expenses, you will want to complete and submit an expense report to get reimbursement for expenses incurred during your trip.

To create an expense report

- 1** Navigate to the Expense Reports screen.
- 2** From the Show drop-down list, select My Expense Reports.
- 3** In the Expense Reports list, click the menu button and then click New Record.
- 4** In the new row, complete the necessary fields and then click Save.

NOTE: You must complete the Submit To field or you will get an error message and your expense report will not be saved.

Detailed Line Items

Each expense report must have at least one line item associated with it. Expense items (or the entire expense report) can be associated with an account, opportunity, project, or contact. Associating expense reports allows you to track expenses appropriately. For expense types such as dinner or entertainment, you can associate contacts and employees. For international travel, you can convert expense report items that include several currencies.

To add detailed line items

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expenses.
- 3 In the Expense Reports list, locate the expense report with which the line items will be associated.
- 4 In the Expense Reports list, drill down on the Name hyperlink.
The Line Items list appears.
- 5 In the Line Items list, click the menu button and then click New Record.
- 6 In the new row, complete the necessary fields and then click Save.

NOTE: Repeat [Step 5](#) and [Step 6](#) until you have added every expense line items.

Hotel and Mileage Expenses

You can enter daily hotel and mileage expenses by drilling down on the Type hyperlink and entering the information.

To enter daily hotel expenses

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expense Reports.
- 3 In the Expense Reports list, drill down on the Name hyperlink.

- 4 In the Line Items list, drill down on the Type hyperlink for Hotel.
The Hotel Expenses list appears and the Details form appears.
- 5 In the Details form, click the menu button and then click New Record.
- 6 In the Details form, complete the necessary fields and then click Save.

NOTE: Repeat [Step 5](#) and [Step 6](#) until you have entered every hotel expense.

To enter mileage expenses

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expense Reports.
- 3 In the Expense Reports list, drill down on the Name hyperlink.
- 4 In the Line Items list, drill down on the Type hyperlink for Mileage.
- 5 In the Details form, click the menu button and then click New Record.
- 6 In the Details form, complete the necessary fields and then click Save.

NOTE: Repeat [Step 5](#) and [Step 6](#) until you have entered every mileage expense. You only have the ability to drill down on the Hotel and Mileage hyperlinks.

Unreported Items

When filling out the detailed line items, you have the option of not reporting some items for reimbursement.

To set an item as unreported

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expenses.
- 3 In the Expense Reports list, locate the expense report to which the line items will be associated.

- 4 Drill down on the Name hyperlink.

The Line Items list appears.

- 5 In the Line Items list, click the menu button, and then click New Record.

- 6 In the new row, complete the necessary fields and then click Save.

- 7 In the Line Items list, select the item or items that you want to unreport and then click Unreport.

The item or items that you select are removed from the Expense Report list and now show up on the Unreported Items list.

NOTE: The totals that are represented on your expense report reflect both billable and nonbillable hours. Only the owner or the prepare will be able to see records in the Unreported Items list. Managers will be able to see the list but it will not display any records.

Auto Expense Reporting

You can also use the Auto Gen feature to automatically populate entered data into the appropriate expense report. This automated process significantly reduces unproductive time and guesswork.

To use AutoGen

- 1** Navigate to the Activities screen.
- 2** From the Show drop-down list, select My Activities.
- 3** In the Activities list, select the Activity with which the expenses will be associated.
- 4** Click on the Expenses view tab.
- 5** In the Expenses list, click the menu button and then click New Record.
- 6** In the new row, complete the necessary fields, click Save.
- 7** From the application-level menu, choose File > Auto > Expenses.

AutoGen is invoked and takes you to the Expense Reports screen where you can make additional edits in the More Info form if necessary.

NOTE: You do not need to be in a particular screen for AutoGen to work. You can use AutoGen from any screen in the application. Above is one example of a screen where it can be used.

AutoGen

For AutoGen to work properly, you must complete the expense report for the time period reported plus three calendar days. Otherwise, you must input your information manually through the Expense Reports screen.

AutoGen will only add activity expense items to an expense report that has not been submitted, rejected, approved, or accepted. If an expense report for the AutoGen period doesn't exist, AutoGen will create one. If an expense report for the AutoGen period exists and is in the In Progress status, then AutoGen will add the line items into the expense report.

For expense items that are created in activity expense, but did not get captured by AutoGen, they will be displayed in the Unreported Items subview of the Report Line Items view.

AutoGen Process

AutoGen works in the following manner:

- It finds the current open expense or time reporting period of type week.
- It then checks to see if you have an expense report with a status of “In Progress” for the current period. If you do not have a report “In Progress,” you will want to create a new report and set the period to the current reporting period.
- It will then find the expenses with a start date which falls within the start and end dates of the current period and associate them to the expense report for that period.

Foreign Currency

If you incur expenses from a foreign country, the application allows you to establish a currency type specific to that country.

To change the default currency code

- 1 Navigate to the Expense Reports screen.
- 2 From the Show drop-down list, select My Expense Reports.
- 3 In the More Info form, Currency field, click the select button.



- 4 In the Pick Currency Code dialog box, select the currency and then click OK.
- 5 Click Save.

Cash Advances

You can enter Cash advances in the Cash Advance field on the More Info form. The amount is subtracted from the total amount owed to you.

To enter cash advance information

- In the Cash Advance field, enter the amount you received as a cash advance.



Cash Advance:
0

NOTE: You can also use the select button.

Submitting an Expense Report

After an expense report has been created and the line items added, you can edit it if necessary (as many times as needed) until you submit the expense report.

When you submit an expense report, the application automatically routes it to your manager for evaluation. If the expense report needs to be submitted to someone other than your manager (such as the team leader or project manager), click the Submit To button and select the person from the Pick Employee dialog box.

Each submitted report is either approved or rejected by the manager. If the manager accepts the report, it is routed to the financial department, and the employee is reimbursed for the amount requested. The status of the report changes to accepted.

To submit an expense report

- 1** Navigate to the Expense Report screen.
- 2** From the Show drop-down list, select My Expense Reports.

The Expense Reports list appears.

- 3** In the More Info view, click the Status drop-down arrow and select submitted.
- 4** Click Save.

If your expense report is rejected, you need to go back into the Expense Reports screen, make the necessary changes, and then resubmit it.

NOTE: The Submitted To, Owner and Prepare of an expense report has the ability to change the Submit To field.

To resubmit an expense report

- 1** Navigate to the Expense Reports screen.
- 2** From the Show drop-down list, select My Expense Reports.
- 3** In the Expense Reports list, change the status field from Rejected to In Progress.
- 4** Click the Line Items view tab.
- 5** In the Line Items list make the necessary changes, click Save.
- 6** In the Expense form, click the Status drop-down list and select Submitted and then click Save.

Monitoring the Status of an Expense Report

After you have submitted your expense report, the application uses email to notify both you and your manager of its progress.

For example, when you submit your expense report to your manager, the manager receives an email notification that there is a time sheet waiting for approval.

Likewise, when the manager has approved or rejected the expense report, you will receive email notification.

Another example of this process is when you send your expense report for approval but your manager is out of the office. In this situation, you are notified so that you can go back into your expense report and resubmit it to another manager.

Printing an Expense Report

You can print expense reports from the Reports menu.

To print an expense report

- 1** Navigate to the Expense Report screen.
- 2** From the Show drop-down list, select My Expense Reports.
- 3** In the Expense Reports list, locate the expense report to which you wish to run the report.
- 4** From the application-level menu, choose View > Reports.
- 5** In the Reports dialog box, select expense reports from the drop down list.
- 6** Click Run.

The application generates your expense report.

Approving Expense Reports

It is your responsibility, as a manager, to check your Team's expense reports and either approve or reject them based on the information in the report.

To approve an expense report

- 1 Navigate to the Expense Report screen.
- 2 From the Show drop-down list, select Expense Report Approval.
- 3 In the Expense Report list, select the expense report to approve.
- 4 In the Expense Report list, click the Status drop-down arrow, and select Approved.
- 5 Click Save.

NOTE: To reject a time sheet, follow the same instructions, except pick Rejected from the Status drop-down list.

Expense Reports Adjustment

There may be times, as a manager, when you received an expense report but it needs to be adjusted, these adjustments are necessary so that the correct information is collected, processed, and billed appropriately to the customer.

To make an expense reports adjustment

- 1 Navigate to the Projects screen.
- 2 In the Show drop-down list, select My Projects.
- 3 In the Projects list, select the project with which the expense report was associated.
- 4 Click the Time & Expense view tab.
- 5 In the Time & Expense list, from the Show drop-down list, select Expense Adjustment.
- 6 In the Time & Expense list, select the expense report that needs to be adjusted.

- 7** In the Adjustment field, click the select button.
- 8** In the Adjusted Amount dialog box, click New.
- 9** In the Amount field adjust the amount as necessary, and then click Save.
- 10** In the Adjusted Amount dialog box, click Close.

The Total Adjustment and Billable Total fields are updated to reflect your adjustments.

Expense Adjustments Chart

You can see a graphical representation of the adjustments made using the Expense Adjustments chart.

You can modify the way the data is represented by using the Show drop-down boxes to change the information.

You can move the mouse over the different bars to get additional information on a particular employee.

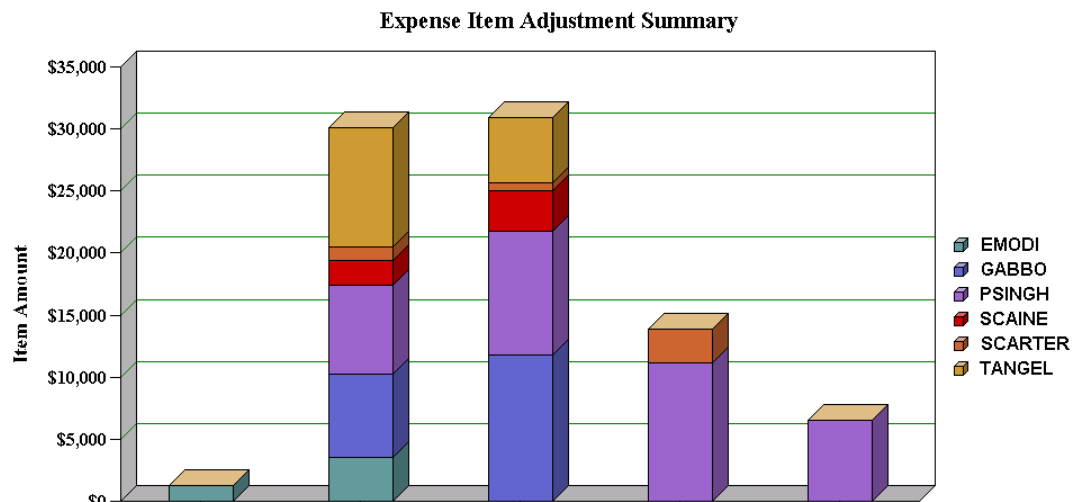


Figure 6-2. Expense Adjustment Chart

Expense Report Summary

The Expense Report Summary view will give you an overall perspective of expenses incurred on a particular projects.

To view expense report summary information

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which time sheet information is associated.
- 4** Click the Time & Expenses view tab.
- 5** In the Time & Expense list, from the Show drop-down list, select Expense Summary.

The information displayed on the Expense Summary list shows you the reported expenses per expense report. To view additional information, drill down on the Expense Report Name hyperlink.

Expense Summary Chart

You can see a graphical representation of the cumulative expense incurred on a project using the Expense Summary Chart.

You can modify the way the data is represented by using the Show drop-down boxes to change the information.

You can move the mouse over the different bars to get additional information on hours logged by a particular employee.

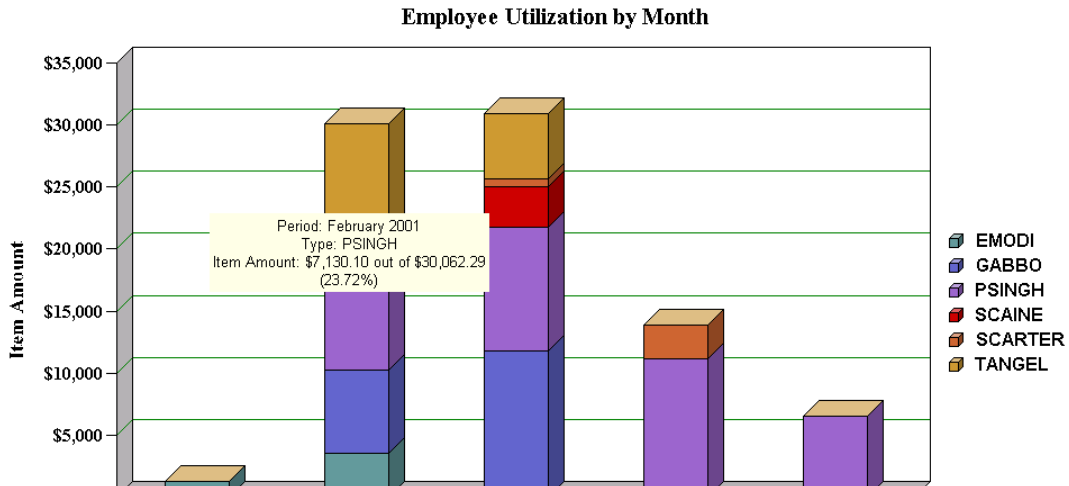


Figure 6-3. Expense Summary Chart

Project Financials

7

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Financials Overview

Tight integration with back office systems allows your organization to take project, time and expense data from the Siebel Projects in order to create client invoices and track accounts receivable in their billing system of choice.

Business Scenario

Emily Modi is the primary engagement manager associated with a new project. She is responsible for the project's primary revenue value. Initially, this revenue amount for the project may be determined by early conversations with the client about scope, budget, and other high-level parameters. As the project progresses, she gathers greater knowledge of the customer's needs. Using this information, Emily can determine which product solution best addresses the client's business problems.

At this point, she enters various product lines. This helps her assess the value of the project. Emily can easily see any adjustments made to the revenue line items. She uses her expertise to adequately assess the value of the project by querying on only those items she finds most relevant to the project.

Once a week, Emily meets with her manager to review current project status. Prior to their meeting, Emily's manager can gather revenue information from the Revenue screen. During the meeting, they can discuss any adjustments that need to be made.

Project Revenue Schedules

Each professional services organization requires various ways of looking at revenue. One level of management may be interested in the margins of their most important projects over time while another organization might focus more heavily on projections or bookings. Across these varied levels of management, organizations might choose to focus on monthly billing, one time revenues, or recurring revenue streams. Revenue schedules were designed with exactly these requirements in mind.

Project managers can associate multiple types of revenue with a project with each revenue schedule item. For example, booked, forecasted, backlogged, and burned.

Just as important as tracking data for individual projects is the ability to analyze it in the aggregate. Revenue analysis allows you to instantly view a graphical representation of the health of a project. With the ad-hoc reporting of the various revenue streams and timing by account, location, or project type, you are better equipped to make more informed and more timely business decisions to help maximize resource utilization and profitability.

To add a new project revenue

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project with which the revenue will be added.
- 4** Click the Revenues view tab.
- 5** In the Revenues list, click the menu button and then click New Record.
- 6** In the new row, complete the necessary fields, click Save.

Project Revenue Chart

The chart view provides a graphical representation which allows you to analyze revenue data.

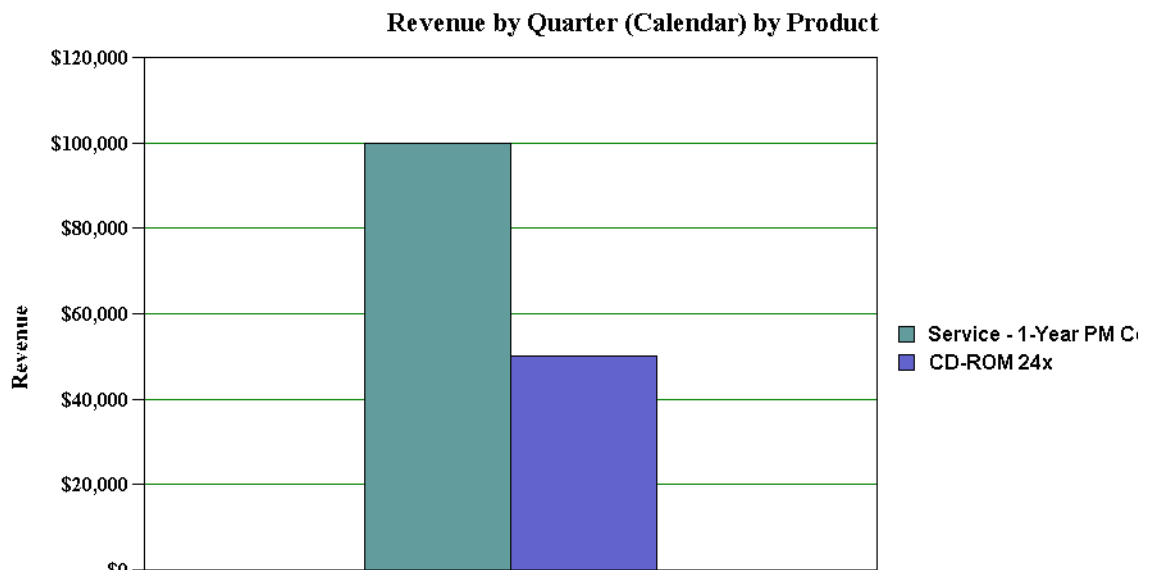
To view revenue data using the Chart view

- 1** Navigate to the Projects screen.
- 2** From the Show drop-down list, select My Projects.
- 3** In the Projects list, select the project for which the information will be displayed.
- 4** Click the Revenues view tab.

- 5 In the Revenues list, from the Show drop-down list, select Chart.

Your data will be displayed in graphical form. Summary values for each chart element will be displayed by the mouse-over feature.

NOTE: Use the By and Then drop-down lists on the Chart view to summarize your data by a variety of segments.



- 6 You can change the look and information displayed on the chart by clicking the Show, By, and Then drop-down arrows and selecting different values.

Show: By: Then:

Project Financials

Project Revenue Schedules

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