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# PeopleSoft Enterprise EPM 9.1 Project Portfolio Management PeopleBook

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# Contents

## Preface

<b>PeopleSoft Enterprise Project Portfolio Management Preface .....</b>	<b>ix</b>
Oracle's PeopleSoft Products .....	ix
Pages with Deferred Processing .....	ix
Related PeopleBooks .....	x
Common Elements Used in Project Portfolio Management .....	x
PeopleBooks and the Online PeopleSoft Library .....	xi

## Chapter 1

<b>Getting Started with Project Portfolio Management .....</b>	<b>1</b>
Project Portfolio Management Overview .....	1
Project Portfolio Management Business Processes .....	2
Project Portfolio Management Integrations .....	2
Security Considerations .....	3
Project Portfolio Management Implementation .....	3

## Chapter 2

<b>Understanding Project Portfolio Management .....</b>	<b>5</b>
Project Portfolio Management .....	5
Main Components .....	5
Scorecards .....	6
Strategy Components .....	6
Key Performance Indicators .....	6
Project Requests .....	7
Portfolios .....	7
Business Units .....	7
Important Data Tables .....	8
Application Engine Processes .....	9
Process Flow .....	9
Integration .....	11

**Chapter 3**

**Setting Up Project Portfolio Management ..... 13**

Understanding Project Portfolio Management Options ..... 13

Establishing System Options and Security ..... 14

    Pages Used to Establish System Options and Security ..... 14

    Defining Prompt Tables for Department and Account Data ..... 15

    Defining How the System Generates Project Request IDs ..... 16

    Defining the Discount Rate ..... 18

    Defining the Currency Conversion Rate Type ..... 19

    Specifying Workflow Options ..... 20

    Defining Integration Settings ..... 21

    Defining Dimensions ..... 23

    Defining Security for Project Requests and Templates ..... 24

Establishing Supporting Data ..... 27

    Understanding Milestones ..... 27

    Understanding Measures and Dimensions ..... 28

    Pages Used to Establish Supporting Data ..... 29

    Defining Budget Record Data ..... 30

    Defining Project Request Priorities ..... 31

    Defining Initiative Types ..... 32

    Defining Milestones ..... 32

    Defining Risk Elements ..... 34

    Defining Measures and Dimensions ..... 34

Establishing Portfolio Analysis Preferences ..... 36

    Understanding Portfolio Analysis Preferences ..... 36

    Pages Used to Establish Portfolio Analysis Preferences ..... 37

    Defining Portfolio Analysis Defaults ..... 37

    Specifying Additional Measures for Portfolio Analysis ..... 38

**Chapter 4**

**Establishing Project Requests ..... 41**

Understanding the Project Request Component ..... 41

    Templates ..... 41

    Versions ..... 42

    Costs and Benefits ..... 42

    Milestones ..... 43

    Scores ..... 43

    Approval Workflow ..... 43

Creating Project Requests and Templates ..... 48

Understanding the Options That Are Available for Creating Project Requests and Templates .....	49
Pages Used to Create Project Requests and Templates .....	50
Establishing Project Requests and Templates .....	51
Adding File Attachments .....	57
Defining Relationships to Other Project Requests .....	57
Assigning Milestones .....	57
Reviewing Approval Status History .....	58
Updating Approval Status .....	59
Specifying Save Options .....	59
Adjusting Dates .....	62
Resolving Issues .....	63
Defining Estimated Costs and Benefits .....	63
Pages Used to Define Estimated Costs and Benefits .....	63
Establishing Estimated Costs .....	64
Establishing Estimated Benefits .....	66
Reviewing Costs and Benefits .....	66
Determining Project Request Scores and Managing Risks .....	67
Understanding Project Request Scores .....	67
Pages Used to Determine Project Scores and Manage Risks .....	68
Defining Score Group Portfolios .....	69
Ranking the Importance of Score Group Components .....	69
Scoring Project Requests .....	71
Associating Risk Elements with Risk Categories .....	73
Analyzing the Impact of Project Requests .....	76
Understanding the Project Request Analysis by Department Component .....	76
Pages Used to Analyze the Impact of Project Requests .....	77
Defining Analysis Options .....	77
Analyzing the Department-Level Impact .....	79
Analyzing Cost Details and Budget Variances .....	82

## Chapter 5

<b>Establishing and Analyzing Project Portfolios .....</b>	<b>85</b>
Understanding Portfolio Analysis .....	85
Establishing Project Portfolios .....	87
Pages Used to Establish Project Portfolios .....	88
Defining Project Portfolios .....	88
Specifying the Project Requests to Include .....	89
Establishing Selection Rules .....	90
Pages Used to Establish Selection Rules .....	90
Defining Dimension Member Selection Rules .....	90
Defining an Advanced Rule .....	92
Previewing Project Request IDs .....	93

Establishing Project Portfolio Trees .....	94
Page Used to Establish Project Portfolio Trees .....	94
Creating a Project Portfolio Tree .....	94
Analyzing Project Portfolios .....	94
Pages Used to Analyze Project Portfolios .....	95
Configuring the Analysis and Reviewing Results .....	95
Specifying the Analysis Parameters .....	99
Viewing Costs and Benefits by Fiscal Year or Period .....	99

## Chapter 6

<b>Using Project Portfolio Management Processes and Utilities .....</b>	<b>101</b>
Understanding Project Portfolio Management Processes and Utilities .....	101
Scorecard Assessment Process .....	101
Update Milestone Probabilities Process .....	102
Convert Currency Utility .....	102
Updating Milestone Probabilities .....	102
Page Used to Update Milestone Probabilities .....	102
Running the Update Milestone Probabilities Process .....	103
Converting Currency .....	103
Page Used to Convert Currency .....	103
Running Currency Conversion .....	103

## Chapter 7

<b>Integrating with PeopleSoft Enterprise Program Management .....</b>	<b>105</b>
Understanding Integration with Program Management .....	105
Defining Integration Options .....	105
Setting Up PeopleSoft Integration Broker .....	106
Activating Relevant Application Messages .....	106
Setting Up Node Definitions .....	106

## Chapter 8

<b>Key Performance Indicators (KPIs) .....</b>	<b>109</b>
Understanding Project Portfolio Management KPIs .....	109
KPI Terminology .....	109
Delivered Elements .....	111
Delivered KPI Details .....	112

**Appendix A**

**Delivered Workflows for Project Portfolio Management ..... 113**

Delivered Workflows for Project Request Approval ..... 113

    Approval Process for Funding Department Managers ..... 113

    Approval Process for Project Approver ..... 114

    Notification for Approved or Denied Request ..... 116

    Notification for Funding Department Manager Approved or Denied Request ..... 117

    Notification to Funding Manager ..... 119

    Notification to Project Sponsor ..... 120

    Request for Detail Project Plan ..... 120

**Index ..... 123**



# PeopleSoft Enterprise Project Portfolio Management Preface

This PeopleBook discusses how to set up and use Oracle's PeopleSoft Enterprise Project Portfolio Management.

This preface discusses:

- Oracle's PeopleSoft products.
- Pages with deferred processing.
- Related PeopleSoft PeopleBooks.
- Common elements used in Project Portfolio Management.

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## Oracle's PeopleSoft Products

This PeopleBook refers to the following PeopleSoft Products:

- PeopleSoft Enterprise Scorecard.
- PeopleSoft Enterprise Program Management.
- PeopleSoft Enterprise Project Costing.
- PeopleSoft Enterprise Project Portfolio Management.
- PeopleSoft Enterprise Resource Management.
- PeopleSoft Enterprise Planning and Budgeting.

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## Pages with Deferred Processing

Several Project Portfolio Management pages may operate in deferred processing mode. Most fields on these pages are not updated or validated until you save the page or refresh it by clicking a button, link, or tab. This delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value that you enter before the system updates the page overrides the default. Another implication is that the system updates quantity balances or totals only when you save or otherwise refresh the page.

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## Related PeopleBooks

Additional, essential information describing the setup and design of your system appears in these companion volumes of documentation:

- *Enterprise Performance Management Fundamentals 9.1 PeopleBook.*

Provides information needed to complete the core setup for all PeopleSoft Enterprise Performance Management (PeopleSoft EPM) applications. This PeopleBook also discusses the system architecture, the mapping of data into the warehouse, and the EPM foundation tools.

- *PeopleSoft Enterprise Scorecard 9.1 PeopleBook.*

Provides information needed to implement and use the Scorecard application. This information is also required to implement Customer Scorecard, Project Portfolio Management, Supplier Rating System, Workforce Scorecard, and the CFO Portal and Investor Portal key performance indicators.

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## Common Elements Used in Project Portfolio Management

This section lists common elements used in Project Portfolio Management.

<b>SetID</b>	Provides the ID code for a tableset. A tableset is a group of tables (records) necessary to define your company's structure and processing options.
<b>Effective Date</b>	Establishes the date on which the row in the table becomes effective. It determines when you can view and change the information. Pages and batch processes that use the information use the current row.
<b>Status</b>	Indicates whether a row in a table is active or inactive. You cannot select inactive rows on pages or use them for running batch processes.
<b>Description</b>	Allows free-form text of up to 30 characters that describes what you are defining.
<b>Run Control ID</b>	Identifies specific run control settings for a process or report.
<b>Report ID</b>	Identifies the report.
<b>Program Name</b>	Provides the PeopleSoft EPM program name for which you are running the report or process.
<b>When</b>	Specifies the frequency with which you want to run a process. You can select <i>Once</i> , <i>Always</i> , or <i>Don't</i> .
<b>Last Run On</b>	Indicates the date on which the report or process was last run.
<b>As Of Date</b>	Indicates the last date for which the report or process includes data.

<b>Scenario ID</b>	Provides an identifier for a specific scenario.
<b>Model ID</b>	Provides an identifier for a model. A model uniquely identifies the types of data that you want to include in a scenario. For example, you might want to review revenue by region—a broad scope. Or, if you use PeopleSoft Activity-Based Management, you might want to review only those activities that relate to a certain product line for certain types of resources—a narrow scope.
<b>Fiscal Year</b>	Specifies the fiscal year for your scenario or process run.
<b>Period</b>	Specifies the accounting period for the object being defined or process being run.
<b>Job ID</b>	Specifies an instance of an engine.

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## PeopleBooks and the Online PeopleSoft Library

A companion PeopleBook called PeopleBooks and the Online PeopleSoft Library contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the PeopleSoft online library including full-text searching and configuring a reverse proxy server.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Glossary of useful PeopleSoft terms that are used in PeopleBooks.

You can find this companion PeopleBook in your PeopleSoft online library.



## Chapter 1

# Getting Started with Project Portfolio Management

This chapter discusses:

- Project Portfolio Management overview.
- Project Portfolio Management business processes.
- Project Portfolio Management integrations.
- Security considerations.
- Project Portfolio Management implementation.

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## Project Portfolio Management Overview

Project Portfolio Management gives you a centralized online tool to include all your enterprise stakeholders in the process of project planning and management. Project requests and projects are collected in a portfolio and treated as investments. Like financial investments, they're reviewed and controlled as one set of interrelated activities. Project Portfolio Management puts structure around the planning process from the time a project request is submitted through budgeting, review, evaluation, and approval. With Project Portfolio Management, key executives speak the same language, share risk, and collaborate in the investment decision-making process so that they can make smart decisions about which projects are critical to corporate success.

Project Portfolio Management enables your organization to:

- Plan, compare, and contrast projects for maximum value.
- Prioritize initiatives based on internal goals and predefined metrics such as cost, risk, and return on investment.
- Align projects with corporate strategies and business objectives.
- Route and communicate project requests among stakeholders.
- Review, budget, evaluate, and approve project requests.

### **See Also**

[Chapter 2, "Understanding Project Portfolio Management," page 5](#)

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## Project Portfolio Management Business Processes

Project Portfolio Management supports the propose to complete portion of the resource and project portfolio management business process. Project Portfolio Management is not a standalone application, as it leverages the functionality that is within Resource Management, Project Costing, Planning and Budgeting, and Program Management to provide a fully integrated project portfolio management solution. Project Portfolio Management provides these business processes:

- Create project requests and submit for approval.
  - Route project requests to the parties who are responsible for operationally and financially authorizing the initiation of a project or program.
  - Create bottoms-up business case justifications for a project or program.
- Strategically analyze project requests.
  - Evaluate high-level resource and budget constraints.
  - Compare and evaluate return on investment, present value, risks, and benefits.

We discuss these business processes in the business process chapters in this PeopleBook.

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## Project Portfolio Management Integrations

Project Portfolio Management's data tables reside in the Operational Warehouse - Enriched (OWE), which serves as a data repository that can include data from other PeopleSoft applications, including Project Costing and Program Management. It also integrates with other PeopleSoft Enterprise Performance Management applications, including, but not limited to:

- Scorecard.
- Planning and Budgeting.

Integration with Program Management is available; if it is enabled, then the system can send project requests to Program Management for the purpose of creating detailed cost estimates.

We discuss integration considerations in the implementation chapters in this PeopleBook.

Supplemental information about third-party application integrations is located on the My Oracle Support website.

### **See Also**

[Chapter 3, "Setting Up Project Portfolio Management," Establishing System Options and Security, page 14](#)

[Chapter 7, "Integrating with PeopleSoft Enterprise Program Management," page 105](#)

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## Security Considerations

The system includes pages with which you can establish role-based security that controls viewing and editing rights to project requests, depending on the project request status. Other security in Project Portfolio Management is established in PeopleSoft EPM, including access rights for scorecards and key performance indicators (KPIs), and access to specific pages.

See [Chapter 3, "Setting Up Project Portfolio Management," Defining Security for Project Requests and Templates, page 24.](#)

See *PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Setting Up EPM Security."

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## Project Portfolio Management Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

### **Other Sources of Information**

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *PeopleBooks and the PeopleSoft Online Library* with information about where to find the most current version of each.

### **See Also**

*PeopleBooks and the PeopleSoft Online Library*

*Enterprise PeopleTools PeopleBook: Setup Manager*

*Enterprise PeopleTools PeopleBook: PeopleSoft Component Interfaces*



## Chapter 2

# Understanding Project Portfolio Management

This chapter provides an overview of Project Portfolio Management and discusses:

- Main components.
- Important data tables.
- Application Engine processes.
- Process flow.
- Integration.

### **See Also**

*PeopleSoft Enterprise Scorecard 9.1 PeopleBook*

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## Project Portfolio Management

Project Portfolio Management enables you to make portfolio management theories a reality in your enterprise. You can collaborate with business leaders to prioritize initiatives based on internal goals and predefined metrics, such as cost, risk, and return on investment (ROI). The application helps you plan, compare, and contrast project requests so you are able to make the right project investments to ensure that your organization undertakes the particular mix of projects that will lead to optimal results.

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## Main Components

This section discusses the main components of Project Portfolio Management, which are:

- Scorecards.
- Strategy components.
- Key performance indicators (KPIs).
- Project requests.

- Portfolios.
- Business units.

## Scorecards

A scorecard is the visual representation of the degree to which you are meeting the objectives that your organization is striving to achieve. A scorecard is based on a strategy tree that comprises hierarchical nodes of strategy components.

## Strategy Components

Strategy components are the elements that compose an organization's strategy. They represent the goals or key business objectives that an organization is striving to achieve, and are the objects that compose a strategy tree. Vision, strategic thrusts, and critical success factors are types of strategy components; they are the levels of a strategy tree.

## Key Performance Indicators

A key performance indicator (KPI) defines the data value or calculation from the EPM Warehouse tables that is evaluated to determine how well an organization is meeting its critical success factors.

Project Portfolio Management delivers a set of preconfigured KPIs that provide executives and middle management the tools to analyze proposed projects and compare them with business objectives. These KPIs have been developed in conjunction with leading consultants, and provide measurements of:

- Risk.
- Key business objectives (KBOs).
- Return on investment (ROI).
- Net present value (NPV).
- Estimated costs.
- Estimated benefits.
- Variance percent.
- Project run rate.
- Health.
- Estimate to complete (ETC).
- Forecast.
- Forecast variance.
- Forecast variance percent.
- Earned value

- Forecast time variance.

The delivered KPIs that you use for Project Portfolio Management are loaded by a data mover script that is run when you install the application. The KPI IDs of the delivered KPIs all begin with *PM\_*. These KPIs use an object type of *PROJECT\_REQUEST* and use data from projects and project requests. The KPIs are associated with several delivered portfolios that enable you to evaluate project requests. You can use them with scorecards or portfolios that you create, to evaluate important project metrics.

### **See Also**

[Chapter 8, "Key Performance Indicators \(KPIs\)," page 109](#)

## **Project Requests**

Project Portfolio Management includes a project request component that enables your enterprise to create project requests and project request templates, perform detailed costing at department and account levels, rate how well a project request supports your organization's key business objectives (KBOs), and rate its relative risk. The Project Request component (BC\_PROJ\_REQUEST) also enables you to view project dependencies and milestones for each project.

### **See Also**

[Chapter 4, "Establishing Project Requests," page 41](#)

## **Portfolios**

A portfolio is a collection of objects that are grouped together for comparative analysis. In the case of Project Portfolio Management, the objects that are compared are project requests, and this information is used to make decisions about which projects to undertake and maintain.

Additionally, portfolios are used to define the score group categories on the Project Request - Scoring page to generate scores that indicate how well a project supports an organization's key business objectives (KBO) and quantifies a project's relative risk.

### **See Also**

[Chapter 5, "Establishing and Analyzing Project Portfolios," page 85](#)

## **Business Units**

Enterprise Performance Management applications use performance business units (PF business units). If you plan to integrate Project Portfolio Management with PeopleSoft Program Management, you must create one PF business unit that corresponds to each project business unit.

To enter costing information for project requests, you also need to define general ledger business units (GL business units).

**See Also**

*PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook*, "Setting Up the Operational Warehouse - Enriched for EPM Analytical Applications"

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## Important Data Tables

This table lists the main records (tables) that Project Portfolio Management uses, with a description of the data they contain:

<b>Tables</b>	<b>Type of Data</b>
BC_ASSESS_F00	Scorecard assessments.
KP_DATAVALS_F00	KPI data element values.
KP_KPI_ASMT_F00	KPI assessment results.
KP_KPI_CALC_F00	Calculated KPI values.
KP_KPI_OVRD_F00	KPI assessment override information.
KP_OBJ_RULE_F00	KPI dimension members defined by a rule.
KP_TRGTVALS_F00	KPI target values.
BC_PROJ_REQUEST	Project requests.
PPK_PROJREQ_AUD	Project request status change audit trail.
BC_COST_EST	Project request estimated costs.
BC_BENFT_EST	Project request estimated benefits.
BC_PRJREQST_DPN	Project request project dependencies.
BC_PRJREQST_MST	Project request milestones.

<b>Tables</b>	<b>Type of Data</b>
BC_PROJ_SCR	Project request score groups.
PPK_PR_SCR_RC	Project request risk categories.
BC_PROJ_SCR_CMP	Project request score categories.
PPK_PR_RISK_ELM	Project request risk elements.
BC_PROJ_ATTACH	Project request attachments.
PPK_TOT_COST	Project request budget approval.
PPK_MST_TBL	Milestones.
PPK_RISK_TBL	Risk elements.

---

## Application Engine Processes

The main Application Engine processes that Project Portfolio Management uses are:

- The Scorecard Assessment Application Engine process (BC\_ASSESS).

This process calculates and assesses key performance indicators and strategy components. The delivered jobstream is BC\_ANALYZE.

- The Update Milestone Probabilities Application Engine process (PPK\_UPD\_MST)

This process updates risk milestones.

### **See Also**

[Chapter 6, "Using Project Portfolio Management Processes and Utilities," page 101](#)

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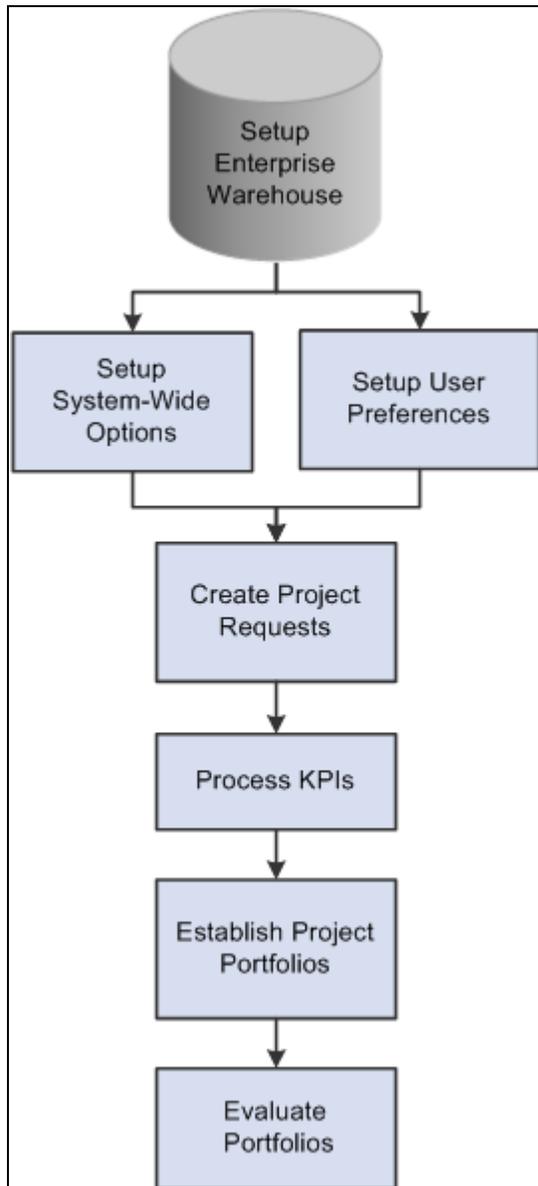
## Process Flow

The main tasks that you perform while using Project Portfolio Management are:

1. Setting up the Enterprise Performance Management foundation.

2. Establishing system-wide options and user preferences.
3. Creating project requests and submitting them for approval.
4. Running the Scorecard Assessment process to calculate and assess KPIs.
5. Creating project portfolios.
6. Reviewing and analyzing project portfolios.

The following diagram shows these tasks:



Project Portfolio Management task overview

Most of the tasks that are listed involve multiple steps and require you to complete multiple pages in the application. These details are discussed in the subsequent chapters of this PeopleBook.

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## Integration

PeopleSoft Enterprise Performance Management enables you to integrate and use budget to date, budget total, actuals to date, and actuals total data from your projects transaction system with Project Portfolio Management by using the extract, transform, and load (ETL) procedure. Typically, you will process ETL on a weekly or monthly basis, depending on your organization's requirements. Use the Modular Deployment report within the Metadata Console feature to determine which ETL maps to run.

Additionally, you can set up integration options that enable the system to share project request data with PeopleSoft Enterprise Program Management.

### **See Also**

[Chapter 3, "Setting Up Project Portfolio Management," Defining Integration Settings, page 21](#)

*PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook, "Setting Up the Operational Warehouse - Enriched for EPM Analytical Applications"*

*PeopleSoft Enterprise Performance Management Fundamentals 9.1 PeopleBook, "Bringing Source Data Into EPM Using Extract, Transform, and Load (ETL)"*



## Chapter 3

# Setting Up Project Portfolio Management

This section provides an overview of Project Portfolio Management options and discusses how to:

- Establish system options and security.
- Establish supporting data.
- Establish portfolio analysis preferences.

---

## Understanding Project Portfolio Management Options

You must establish the following options before you use the system to create and analyze project requests:

- System options.
- Supporting data.
- User preferences for portfolio analysis.

### ***System Options***

The system options are application-wide settings that:

- Establish the records that the system uses for department and account data.
- Control how project request IDs are generated.
- Define discount rates.
- Define currency conversion rate types.
- Define workflow options.
- Define integration options.
- Define the dimensions and measures available for portfolio analysis.
- Identify which users can edit project request data.

### ***Supporting Data***

The supporting data that you define establishes:

- Initiative types, which are used to map a specific type of project to a particular project owner.

- Priority selections, which are used to rank the importance of project requests.
- The database records that the system uses to determine the allowed departmental budget amounts for project requests.
- The measures and dimensions that are available for use in project portfolio analysis.
- Risk elements, which are used to categorize risks.
- Milestones for project requests and risk elements.

### ***User Preferences for Portfolio Analysis***

These preferences establish the default business unit, scenario, fiscal year, and period that a user views when analyzing project portfolios, and any additional measures to include.

---

## **Establishing System Options and Security**

To establish system options and security use the PPM Preferences (BC\_GENERAL\_PREF), Security (BC\_PROJ\_ROL\_VW), and Privileges for Project Requests and Templates (BC\_PROJ\_ROL\_ST) components.

This section discusses how to:

- Define prompt tables for department and account data.
- Define how the system generates project request IDs.
- Define the discount rate.
- Define the currency conversion rate type.
- Specify workflow options.
- Define integration settings.
- Define dimensions.
- Define security for project requests and templates.

### **Pages Used to Establish System Options and Security**

<b><i>Page Name</i></b>	<b><i>Definition Name</i></b>	<b><i>Navigation</i></b>	<b><i>Usage</i></b>
PPM Prompt Tables	BC_SETUP_PROMPT	Project Portfolio Management, Administration, PPM Preferences, PPM Prompt Tables	Specify which tables the system uses to prompt for department and account data.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Project Request ID Sequencing	BC_PM_OPTIONS	Project Portfolio Management, Administration, PPM Preferences, Project Request ID Sequencing	Specify how to generate project request IDs.
Discount Rate	PPK_DISC_RATE	Project Portfolio Management, Administration, PPM Preferences, Discount Rate	Specify the discount rate to use to calculate monetary values such as net present value and return on investment.
Conversion Rate Type	PPK_RT_TYPE	Project Portfolio Management, Administration, PPM Preferences, Conversion Rate Type	Specify which rate type the system should use to convert currency amounts.
Workflow Options	PPK_WF_OPTIONS	Project Portfolio Management, Administration, PPM Preferences, Workflow Options	Establish application-level workflow options for project request approvals.
Integration	PPK_PG_SETUP	Project Portfolio Management, Administration, PPM Preferences, Integration	Specify whether to integrate Project Portfolio Management with PeopleSoft Program Management.
Analysis Dimensions	PPK_DIM_LIST	Project Portfolio Management, Administration, PPM Preferences, Analysis Dimensions	Specify the fields to use as dimensions for portfolio analysis.
Security	BC_PROJ_ROL_ST_VW	Project Portfolio Management, Administration, Security	Review security for projects and templates by role and status.
Privileges for Project Requests and Templates	BC_PROJ_ROL_ST	Click Add Role or click a role name on the Security page.	Specify security for project requests and templates by role and status.

## Defining Prompt Tables for Department and Account Data

Access the PPM Prompt Tables page (Project Portfolio Management, Administration, PPM Preferences, PPM Prompt Tables).

PPM Prompt Tables

Project Request ID Sequencing | Discount Rate | Conversion Rate Type

**PPM Prompt Tables**

Specify the database tables that store valid departments and accounts. These tables are used as prompts on other pages to list departments and accounts from which you can select a value

Industry Type: Commercial

\*Department Prompt Table: DEPARTMENT\_TBL

\*Account Prompt Table: GL\_ACCOUNT\_TBL

PPM Prompt Tables page

### Department Prompt Table

Select the name of the PeopleSoft record that contains department data.

The system uses this record as a prompt for valid department values on the Cost and Benefit pages of the Project Request component (BC\_PROJ\_REQUEST). It is very important to select the record that accurately depicts the department hierarchy as defined within the general ledger business unit. The record that you enter must be keyed by setID and contain a DESCR field.

---

**Note.** The system is delivered with the value *DEPARTMENT\_TBL* in this field. Most organizations simply accept this value, which is the standard department record that is used in the PeopleSoft Enterprise Financial Management and PeopleSoft Enterprise Performance Management databases.

---

### Account Prompt Table

Select the name of the PeopleSoft record that contains account data.

The system uses this record as a prompt for valid account values on the Cost and Benefit pages of the Project Request component. It is very important to select the record that accurately depicts the account hierarchy as it's defined within the general ledger business unit. The table must be keyed by setID and contain a DESCR field.

---

**Note.** The system is delivered with the value *GL\_ACCOUNT\_TBL* in this field. Most organizations simply accept this value, which is the standard account record that is used in the PeopleSoft Enterprise Financial Management and PeopleSoft Enterprise Performance Management databases.

---

## Defining How the System Generates Project Request IDs

Access the Project Request ID Sequencing page (Project Portfolio Management, Administration, PPM Preferences, Project Request ID Sequencing).

PPM Prompt Tables | **Project Request ID Sequencing** | Discount Rate | ▶

---

**Project Request ID Sequencing**

Choose the method by which to generate Project Request IDs.  
 Select Automatic Numbering for the system to generate a unique Project Request ID by appending the Project Request ID Prefix with the next sequential number. Select Manually Entered to enter specific IDs.

**\*Sequence Type:**  ▼

**Project Request Prefix:**

**Project Request Sequence:**

▼ **Overrides** Customize | Find | 1 of 1

*Business Unit	Project Request Prefix
<input type="text" value="NATL"/> 🔍	<input type="text" value="NT"/> +

Project Request ID Sequencing page

PPM Prompt Tables | **Project Request ID Sequencing** | Discount Rate | ▶

---

**Project Request ID Sequencing**

Choose the method by which to generate Project Request IDs.  
 Select Automatic Numbering for the system to generate a unique Project Request ID by appending the Project Request ID Prefix with the next sequential number. Select Manually Entered to enter specific IDs.

**\*Sequence Type:**  ▼

**Project Request Prefix:**

**Project Request Sequence:**

▼ **Overrides** Find | 1 of 1

*Business Unit	Project Request Prefix
<input type="text" value="NATL"/> 🔍	<input type="text" value="NT"/> + -

Project Request ID Sequencing page

## Project Request ID Sequencing

<b>Sequence Type</b>	<p>Specify how project request IDs are assigned. Options are:</p> <p><i>Automatic Numbering:</i> Select to have the system automatically generate unique project request IDs for new project requests by adding the project request ID prefix to the beginning of the next number in sequence after the value that appears in the Project Request ID Sequence field.</p> <p><i>Manually Entered:</i> Select to enter project request ID numbers manually when new project requests are created.</p>
<b>Project Request Prefix</b>	<p>Enter a prefix to use for project request IDs. The system appends the next available project ID sequence number to this prefix to generate project request IDs.</p> <p>Use the Overrides grid to specify different prefixes for specific business units.</p> <p>This field is unavailable for entry when the sequence type is set to <i>Manually Entered</i>.</p>
<b>Project Request Sequence</b>	<p>Enter the initial number to use for project request IDs that are automatically generated. This number increases by one when a new project request is created.</p> <p>This field is unavailable for entry when the sequence type is set to <i>Manually Entered</i>.</p> <hr/> <p><b>Note.</b> Although you can edit the Project Request Sequence field, you should not change it after project requests exist because doing so could cause project request ID conflicts. Also, project request IDs must be unique throughout the system, regardless of the business unit with which they are associated, to integrate with PeopleSoft Enterprise Project Costing.</p> <hr/>

### Overrides

Complete this grid to specify different project request ID prefixes for individual business units. Sequence numbers increase by one across all business units; only the prefix can differ. This grid is unavailable for entry when the sequence type is set to *Manually Entered*.

## Defining the Discount Rate

Access the Discount Rate page (Project Portfolio Management, Administration, PPM Preferences, Discount Rate).

The screenshot shows the 'Discount Rate' page within the PPM administration interface. The breadcrumb trail at the top includes 'PPM Prompt Tables', 'Project Request ID Sequencing', 'Discount Rate', and 'Conversion Rate Type'. The main content area is titled 'Discount Rate' and contains the instruction: 'Specify the discount rate that applies to monetary amounts. Used when calculating NPV, ROI, and other values.' Below this is a table with two columns: '\*Effective Date' and '\*Discount%'. The first row shows '01/01/1900' in the date field and '1.50' in the discount percentage field. The table also includes navigation controls like 'Customize', 'Find', 'First', '1 of 1', and 'Last'.

Discount Rate page

- Discount%** (discount percentage) Enter the rate that the system can use to discount the project request cost and benefit amounts to calculate financial metrics. The system uses this rate when calculating the KPI values for present value of benefits, return on investment, and net present value.
- Effective Date** The date upon which the discount percentage goes into effect. This enables you to change over time the rate at which the organization discounts cash flows.

## Defining the Currency Conversion Rate Type

Access the Conversion Rate Type page (Project Portfolio Management, Administration, PPM Preferences, Conversion Rate Type).

The screenshot shows the 'Conversion Rate Type' page within the PPM administration interface. The breadcrumb trail at the top includes 'PPM Prompt Tables', 'Project Request ID Sequencing', 'Discount Rate', and 'Conversion Rate Type'. The main content area is titled 'Currency Conversion Rate' and contains the instruction: 'Conversion Rate type. Specify the rate type the system uses when converting currency amounts.' Below this is a 'Rate Type' field with a dropdown menu showing 'CRRNT' selected, followed by a magnifying glass icon and the text 'Current Rate'.

Conversion Rate Type page

**Rate Type**

Select the rate type to use for currency conversions.

Currency conversions apply to several pages: the Project Request component pages, the Portfolio Analysis page, and the Project Request Analysis by Department page.

**See Also**

[Chapter 6, "Using Project Portfolio Management Processes and Utilities," Converting Currency, page 103](#)

**Specifying Workflow Options**

Access the Workflow Options page (Project Portfolio Management, Administration, PPM Preferences, Workflow Options).

Workflow Options page

**Enable Workflow**

Select to enable workflow functionality for project request approvals. This workflow sends submitted project requests to the worklist of the person who is designated as the owner and approver on the project request based on the initiative type that the requester selects; the owner can then either change the approver to someone else or decide whether to approve, cost, return, or deny the request himself. Use the Workflow Options group box to activate additional workflow options.

**Workflow Options**

These options are active only when the Enable Workflow check box is selected.

### **Require Funding Department Manager approval**

Select to additionally require funding department manager approval for project requests. The system first routes submitted project requests to the project request approver for review and approval. If the approver approves the request, the project request status changes to *Operationally Approved*, and the manager (the funding department manager) of each unique department ID that is specified on the Project Request component's Costs page receives the project request for approval. Requiring funding department manager approval means that both of these roles must approve the project request before the system changes its status to *Approved* and activates its corresponding program or project.

---

**Note.** If funding department manager approval is required, then every department needs to have a manager identified.

---

### **Email Notifications**

Select one or more options to control when the system sends email notifications. Options are:

Notify when Project Request is submitted: Select to have the system send email notifications to the project sponsor and funding department managers when the project request is submitted.

Notify when Project Request is updated: Select to have the system send email notifications to the project sponsor and funding department managers when a project requester resubmits a returned project request.

Notify when Detail Plan is created: Select to have the system send email notifications to the project sponsor and funding department managers when a project manager clicks the Send to Project Request button on the Project Request Estimate Summary page in the Program Management application to update the project request's cost estimate.

Notify when Project Request is approved: Select to have the system send email notifications to the project owner, project sponsor, project requester, and project manager when the final required approver approves the project request.

Notify when Project Request is denied: Select to have the system send email notifications to the project owner, project sponsor, project requestor, and project manager when either a project approver or a funding department manager declines the request.

### **See Also**

[Chapter 4, "Establishing Project Requests," Approval Workflow, page 43](#)

## **Defining Integration Settings**

Access the Integration page (Project Portfolio Management, Administration, PPM Preferences, Integration).

Conversion Rate Type | Workflow Options | **Integration** | Analysis Dimensions

**Integration Setup**

PeopleSoft Program Management Enabled

**Current Portal**

**Market:** Global

**Portal Name:** EMPLOYEE

**Xfer Node Name:** ERP

**Menu Name:** CREATE\_PROJECTS

**Component ID:** PROJECT\_GENERAL

**Page Name:** PROJECT\_GEN\_01A

Integration page

Discount Rate | Conversion Rate Type | Workflow Options | **Integration**

**Integration Setup**

PeopleSoft Program Management Enabled

**Current Portal**

**Market:** Global

**Portal Name:** EMPLOYEE

**Xfer Node Name:** ERP

**Menu Name:** CREATE\_PROJECTS

**Component ID:** PROJECT\_GENERAL

**Page Name:** PROJECT\_GEN\_01A

Integration page

## Integration Setup

**PeopleSoft Program Management Enabled** Select if you are also implementing PeopleSoft Program Management. When you select this check box, the system displays several fields on the Project Request component pages and the Project Approval page that are otherwise hidden.

---

**Note.** Portal node definitions must be defined for integration to work.

---

## Current Portal

The values in these fields provide the information that is required for the system to link to the General Information page (PROJECT\_GEN\_01A) in Program Management from the Project Request page in Project Portfolio Management. This group box does not appear unless the PeopleSoft Program Management Enabled check box is selected. The default values for these fields are delivered as system data. You do not need to change them unless modifications have been made to Program Management that require that you to link to a page other than PROJECT\_GEN\_01A to view project data.

**Market** Select the market category for the portal application.

**Portal Name** Select the portal name.

**Xfer Node Name** Select the transfer node.  
(transfer node name)

**Menu Name, Component ID, and Page Name** Enter the names for the menu, component, and page to access when your users click the Project ID link on the Project Request page.

## See Also

*PeopleSoft Enterprise Portal Solutions PeopleBook: Enterprise Portal Application Technology*

*Enterprise PeopleTools Portal Technologies*

## Defining Dimensions

Access the Analysis Dimensions page (Project Portfolio Management, Administration, PPM Preferences, Analysis Dimensions).

[Conversion Rate Type](#) | [Workflow Options](#) | [Integration](#) | **[Analysis Dimensions](#)**

Select the Fields to Use as Dimensions Customize | Find | First 1-26 of 26 Last

*Field Name	*Description		
ASSESS_ID	Assessment	+	-
BC_APPROVER	Approver	+	-
BC_APPROVER_ID	Approver ID	+	-
BC_DEPTID_REQSTER	Requesting Department	+	-
BC_INDUSTRY_TYPE	Industry Type	+	-
BC_INVESTMENT_TYPE	Investment Type	+	-
BC_PROJECT_OWNER	Project Owner	+	-
BC_PROJ_DEPTID	Project-Owning Department	+	-
BC_PROJ_OWNER_ID	Project Owner ID	+	-
BC_PROJ_REQ_STATUS	Request Status	+	-
BC_REQUESTER	Requester	+	-
BC_REQUESTER_ID	Requester ID	+	-
BC_SPONSOR	Business Sponsor	+	-
BC_SPONSOR_ID	Sponsor ID	+	-
LOCATION	Location Code	+	-

Analysis Dimensions page

Define the project request-related dimension fields that are available for use in portfolio analysis by inserting rows and selecting the field name. The dimensions that are defined when you use this page are the dimensions that are available for users to select when they use the Define Measures/Dimensions page to define their portfolio analysis dimensions.

## Defining Security for Project Requests and Templates

Access the Security page (Project Portfolio Management, Administration, Security).

## Security

To make changes click on the Role Name

Privileges for Project Requests and Templates								Customize	Find	First	1-3 of 3	Last
Role Name	Approved	Pending	Submitted	Canceled	Declined	Returned	Op. Appr.	Template				
<a href="#">DEPT MGR</a>	View	Edit	Edit	Edit	View	Edit	View	Edit				
<a href="#">PAPP_USER</a>	View	Edit	View	Edit	View	Edit	View	Edit				
<a href="#">PMO_USER</a>	View	Edit	Edit	Edit	View	Edit	View	Edit				

[Add Role](#)

Security page

## Security

To make changes click on the Role Name

Privileges for Project Requests and Templates								Find	First	1-3 of 3	Last
Role Name	Approved	Pending	Submitted	Canceled	Declined	Returned	Op. Appr.	Template			
<a href="#">DEPT MGR</a>	View	Edit	Edit	Edit	View	Edit	View	View			
<a href="#">PAPP_USER</a>	View	Edit	View	Edit	View	Edit	View	Edit			
<a href="#">PMO_USER</a>	View	Edit	Edit	Edit	View	Edit	View	View			

[Add Role](#)

 Refresh

Security page

Use the pages within this component to define which roles within an organization are able to edit project request templates and project requests based on their status.

This page lists currently defined roles and their assigned edit privileges for project request templates (the Template column) and for project requests that are in the following statuses: approved, pending, submitted, canceled, declined, returned, operationally approved (the Op. Appr. column). You can either add a role or modify an existing privilege definition.

---

**Note.** Use PeopleSoft security to limit access to this page to the appropriate users within the organization.

---

### Add Role

Click to add a role and define its edit privileges. The role must already exist. You establish roles by using PeopleSoft security.

### <Role Name>

Click a role name within the grid to modify its privileges.

### Specifying Privileges

Access the Privileges for Project Requests and Templates page (click Add Role or click a role name on the Security page).

#### Privileges for Project Requests and Templates

Role Name: PMO\_USER PMO\_USER: clone of PAPP\_USER

Select Status for which Project Request can be edited

Request Status	Edit Page
Pending	<input checked="" type="checkbox"/>
Submitted	<input checked="" type="checkbox"/>
Canceled	<input checked="" type="checkbox"/>
Returned	<input checked="" type="checkbox"/>
Operationally Approved	<input type="checkbox"/>

Edit Project Request Templates

[View Privileges for All Roles](#)     [Delete Privileges of this Role](#)

Privileges for Project Requests and Templates page

**Edit Page**

Select to permit this role to edit a project request when it has the status that is listed in the current row. When this option is not selected, the role has only view access.

---

**Note.** Use the delivered demo as a guideline for how you should establish edit privileges for the various roles that participate in the project request entry and approval business process. The key roles to consider emulating in the implementation are project requester, project owner, project manager.

---

**Edit Project Request Templates**

Select to permit this role to edit project request templates.

**View Privileges for All Roles**

Click to view a list of roles with defined privileges.

**Delete Privileges of this Role**

Click to delete this role's edit privileges.

**See Also**

Chapter 4, "Establishing Project Requests," page 41

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## Establishing Supporting Data

To establish supporting data, use the Department Budget Source (BC\_PRBUD\_FLT), Priority (PPK\_PRIORITY\_UPD), Initiative Type (PPK\_INITYPE\_TBL), Milestone (PPK\_MILESTONE), Risk Elements (PPK\_RISK\_ELEMENT), and Measures and Dimensions (PPK\_MSRS\_DIM) components.

This section provides overviews of milestones and measures and dimensions, and discusses how to:

- Define budget record data.
- Define project request priorities.
- Define initiative types.
- Define milestones.
- Define risk elements.
- Define measures and dimensions.

## Understanding Milestones

Milestones represent a significant task or activity in a project that must be accomplished on time or the project may be delayed or at risk. You define and maintain milestones independently from project requests and store them in a shared library by using the Milestone page. This enables an owner to be associated with each milestone that can differ from the project request owner. After a milestone has been defined, only the individual that is specified as the milestone owner can modify it. Two types of milestones exist:

- Standard milestones.
- Risk milestones.

### ***Standard Milestones***

This type of milestone provides a measurement of the progress of a project request. Typically, these milestones are used to indicate certain key tasks that must be achieved by a given date, and the person who is responsible. You associate these milestones with a project request by using the Project Request - Milestones page.

### ***Risk Milestones***

This type of milestone is used to track and measure identified risks (risk elements) that are associated with a project request. Their primary function is to affect the net score for the primary risk score group by considering the probability that they will occur on time and their status. You associate a risk milestone with a risk element by using the Project Requests - Risk Elements page. Risk elements are associated with the individual risk categories that make up the risk score group that indicates a project's relative risk.

You can define the level of confidence that a risk milestone will be completed on schedule as a percentage value between 0 and 100; this percentage is used when the system computes the project's net relative risk score. Optionally, you can have the system automatically update the probability that a risk milestone will occur based on changes to its status, start date, and due date by running the Update Milestone Probabilities Application Engine process. This option is set individually for each risk milestone when you establish the milestone.

### **See Also**

[Chapter 4, "Establishing Project Requests," Determining Project Request Scores and Managing Risks, page 67](#)

## **Understanding Measures and Dimensions**

The project request data that you can analyze by using the Portfolio Analysis component is determined by definitions that are established for measures and dimensions. These dimensions and measures are the data that is available to use for the various elements of portfolio analysis. Measures and dimensions are established at implementation and stored in a shared library that is available to all users. However, security is enforced when you are using the Portfolio Analysis component, and as a result, users view only the data to which they have been granted access. Also, you must specify how the system should aggregate (roll up) amounts at the summary node levels on the project portfolio tree.

### **Measures**

Measures are numerical data that can be used in the Portfolio Analysis component. The data source for a measure must be a key performance indicator (KPI); either use the KPIs that are delivered with Project Portfolio Management, or define your own KPIs.

The Portfolio Analysis component uses a project portfolio tree to determine the project request data to view. When defining a measure, you must specify how the system should compute the values for summary nodes on the project portfolio tree by aggregating the values within a subordinate child node. Options are to either compute a weighted average of the values of the subordinate nodes (child nodes), or sum together the values of the subordinate nodes. If you use the weighted average method, you need to specify on which field the weighting is based; typically, implementations use estimated cost to evaluate the measure relative to a project request's costs.

You also need to define how the system should determine the assessment of KPIs at summary node levels of the project portfolio tree. The following options are available:

- *Best.*

The assessment for a summary node is the highest-ranked assessment of the child node.

- *Most Often.*

The assessment for a summary node is the most commonly returned assessment of the child node.

- *None.*

No assessments are available for summary nodes.

- *Rollup Score.*

The assessment for a summary node is the highest-ranked assessment that is received in the subordinate (child) node.

- *Worst Case.*

The assessment for a summary node is the lowest-ranked assessment that is received in the subordinate (child) node.

If you use the *Rollup Score* option, you must complete the assessment grid to indicate the assessment rules to use. If you select *Most Often*, you need to indicate how to determine the assessment in the event that no particular assessment was received more frequently than any other.

### **Dimensions**

Dimensions are non-numerical (character-based) data that can be used in the Portfolio Analysis component. The data source for a dimension must be one of the following columns from the project request database record: KPI assessment, investment type, owner/manager, project request ID, status. Dimensions enable you to analyze project requests by grouping them according to their dimension value. For example, you can view project requests by their initiative type, status, or any of the other valid dimensions.

To define an assessment-based dimension, which returns assessment results for a KPI, you also must specify the KPI for which to analyze assessments and the method by which the system determines the assessments at each summary node of the project portfolio tree.

### **See Also**

[Chapter 5, "Establishing and Analyzing Project Portfolios," page 85](#)

## **Pages Used to Establish Supporting Data**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Department Budget Source	BC_PRBUD_FLT	Project Portfolio Management, Administration, Building Blocks, Department Budget Source	Indicate which database records contain budget data. This information is used to determine the departmental budget amount that is allowed for project requests.
Priorities	PPK_PRIORITY_UPD	Project Portfolio Management, Administration, Building Blocks, Priorities	Establish priority ratings to assign to project requests.
Initiative Type	PPK_INITYPE_TBL	Project Portfolio Management, Administration, Building Blocks, Initiative Types	Set up unique identifiers that map different types of project requests to specific project owners.

Page Name	Definition Name	Navigation	Usage
Milestone	PPK_MILESTONE	<ul style="list-style-type: none"> <li>Project Portfolio Management, Administration, Building Blocks, Milestones</li> <li>Project Portfolio Management, Project Requests, Project Requests, Milestones</li> </ul> <p>Click Create New Milestone.</p>	Establish milestones.
Risk Element	PPK_RISK_ELEMENT	Project Portfolio Management, Administration, Building Blocks, Risk Elements	Establish risk elements.
Define Measures/Dimensions	BC_PRJ_KPI_RULE	Project Portfolio Management, Administration, Building Blocks, Measures/Dimensions	Establish the data that is available to use when you are analyzing project portfolios.

## Defining Budget Record Data

Access the Department Budget Source page (Project Portfolio Management, Administration, Building Blocks, Department Budget Source).

### Department Budget Source

\*Record (Table) Name:

\*Amount Field:

Complete the fields within the filter criteria grid to specify a criteria by which to limit the accounts used for budget amounts.

Open Brackets	Field Name	Comparison Operator	Value	Close Bracket	Relationship to other Criteria		
▼	<input type="text" value="ACCOUNT"/>	▼ Like	<input type="text" value="615"/>	▼	▼	+	-

Department Budget Source page

### ***Budget Data***

- Record (Table) Name**      Select the database record that contains the budget ledger data.
- Amount Field**              Select the field within the budget ledger record that contains the budgeted cost amounts. Typically this is the account field.
- Delete Department Budget Source**      Click to delete the currently defined budget source.

Budget amounts are shown on the Variance Analyzer page and enable you to compare department budget amounts to estimated project costs.

### ***(Optional) Filter Criteria***

Complete the fields within the filter criteria grid to specify criteria by which to limit the accounts used for budget amounts. If you leave this grid blank, all accounts are used to generate the budgeted cost totals. However, the system selects only budget amounts that have a Project ID specified.

You should define your filter criteria to select the budget accounts that your organization uses for budgeting project-related expenses, such as labor, materials, travel, and so on.

## **Defining Project Request Priorities**

Access the Priorities page (Project Portfolio Management, Administration, Building Blocks, Priorities).

**Priorities**

Define Priority levels for use in Project Requests.

*Priority	*Description		
1	Very High	+	-
2	High	+	-
3	Medium	+	-
4	Low	+	-
5	Very Low	+	-

Priorities page

To define priorities, insert rows as needed and enter a priority number and description for each priority. Five priority levels and their corresponding descriptions are delivered. The data that you define in this page is used as the source for the valid priorities that appear in the Priority drop-down list box on the Project Request page.

## Defining Initiative Types

Access the Initiative Type page (Project Portfolio Management, Administration, Building Blocks, Initiative Types).

The screenshot shows the 'Initiative Type' page. At the top, it displays 'SetID: SHARE' and 'Initiative Type ID: FACILITIES'. Below this is a table titled 'Initiative Type Definition'. The table has a single row with the following data:

Effective Date	Status	Description	Owner ID
01/01/1900	Active	Facilities Management	VP5

Initiative Type page

**Initiative Type ID** Specify a unique identifier for the initiative type. Initiative types are categories that are used for the purpose of classifying the various types of projects within your organization. When you use the portfolio analysis page, you can analyze project requests based on their initiative type.

**Owner ID** Select the individual that is associated with this initiative type.

When you create a project request that is associated with an initiative type, the system automatically populates the project request's Project Owner and Approver fields with the owner ID of the individual who is specified as the owner of the assigned initiative type.

## Defining Milestones

Access the Milestone page (Project Portfolio Management, Administration, Building Blocks, Milestones).

### Milestone

SetID: SHARE Milestone: AP\_ARCH

#### Milestone Definition

Description: Select technology and software for AP project

Owner: DVP1 Fields,Julia Status: Not Started

Start Date: Due Date:

#### Risk Milestone

Risk Milestone  Probability Automatic Update

Probability of Occurrence (%): 80.00

#### Project Requests that Use the Milestone

[Customize](#) | [Find](#) | | [First](#) | [1-2 of 2](#) | [Last](#)

Project Request	Description	Risk Category	Risk Element	Description
<a href="#">HT10010</a>	Accounts Payable (ERP)	Corporate Vision	TECH	Risk on chosen technology
<a href="#">HT10010</a>	Accounts Payable (ERP)	Dependency on Commercial Dev	PROJ_ONTIME	Project delay

Milestone page

### ***Milestone Definition***

**Owner** Select the individual who is primarily responsible for this milestone. After a milestone is defined, only the owner can update it.

**Status** Select the milestone's current status. Options are: *Not Started*, *In Progress*, *Completed*, and *Canceled*. When the Update Milestone Probabilities process runs, it evaluates the status.

**Start Date** Enter the date on which the milestone begins. When the Update Milestone Probabilities process runs, it evaluates this date.

**Due Date** Enter the date on which the milestone should be completed. When the Update Milestone Probabilities process runs, it evaluates this date.

**Delete** Click to delete the current milestone from the system. You can delete only milestones that are not associated with project requests.

### ***Risk Milestone***

**Risk Milestone** Select this option if the milestone is a risk milestone. Only risk milestones can be associated with risk elements; non-risk milestones can be associated only with project requests.

- Probability Automatic Update**      Select this option to enable the system to update the milestone's probability, based on the current milestone status, when the Update Milestone Probabilities process runs. If the probability does change, it impacts the primary risk net score of the associated project request.

This field is available for entry only when Risk Milestone is selected.
  
- Probability of Occurrence (%)**      Enter a value that indicates the probability that the milestone will finish on time. This field is available for entry only when Risk Milestone is selected. The Update Milestone Probabilities application engine process can also update this field.

***Project Requests that Use the Milestone***

This grid lists the project requests to which this milestone is assigned.

- Project Request**      Click a project request ID to access the Project Request page, where you can view the project request definition.

**See Also**

[Chapter 6, "Using Project Portfolio Management Processes and Utilities," page 101](#)

[Chapter 4, "Establishing Project Requests," page 41](#)

## Defining Risk Elements

Access the Risk Element page (Project Portfolio Management, Administration, Building Blocks, Risk Elements).

**Risk Element**

Risk Element: FUNDING

\*Description:

Risk Element page

Enter a description of the risk element. Risk elements are shared among all project requests. They categorize a type of a risk.

## Defining Measures and Dimensions

Access the Define Measures/Dimensions page (Project Portfolio Management, Administration, Building Blocks, Measures/Dimensions).

### Define Measures/Dimensions

Measure/Dimension: RISK

Description:

Dimension

Source Dimension:

Project Count

Source Measure:

Rollup Using:

Weighted By:

Assess Using:

Tie Breaker:

Define Measures/Dimensions page

#### **Dimension and Source Dimension**

Select Dimension to return the value from a project request field, and then specify which field by making a selection from the Source Dimension drop-down list box. You establish the dimensions that are available for selection by using the Analysis Dimensions page.

The *Assessment* dimension source returns the assessment results of the KPI that is selected in the Source Measure field. If you select *Assessment*, then you must also complete the Source Measure field. If you are defining a dimension based on any other dimension source, no other fields are required and the remaining fields are unavailable for entry.

#### **Project Count**

Select this option to return the number of project requests. When this option is selected, the only other required fields are Description and ID. The remaining fields are unavailable for entry.

#### **Source Measure**

Select the KPI that serves as the source of the data.

This field is required when you are defining a measure or when you are defining a dimension that uses *Assessment* as the source dimension.

#### **Rollup Using**

Indicate how the system calculates the totals on summary-level nodes of the project portfolio tree. Options are:

*Average*: Select to compute an average of the values from subordinate nodes.

*Sum*: Select to add together values from subordinate nodes.

*Weighting*: Select to compute a weighted average of the values from subordinate nodes. If you select this option, you must also complete the Weighted By field.

#### **Weighted By**

Select the KPI on which to base the weighted average for summary-level node totals that use weighting.

This field is available for entry only when the Rollup Using field is set to *Weighting*.

<b>Assess Using</b>	Indicate the method by which the system determines the assessments at each summary node of the project portfolio tree.
<b>Tie Breaker</b>	Specify the assessment to assign if the assessments for summary nodes are determined by the most common assessment result and no single assessment was received more often than any others. This field is available for entry only when the Assess Using field is set to <i>Most Frequent</i> . Options are:  <i>Best Case</i> : Select to use the best assessment result. <i>Worst Case</i> : Select to use the worst assessment result.

### **Assessment Rules**

For measures that are assessed based on their rollup score, complete this grid to define how the system determines assessments by designating the range of values that receive a particular assessment. This is required for measures when the Assess Using field is set to *Rollup Score*.

<b>Sequence</b>	Enter a number to associate with each target rule. The rules are evaluated in ascending order based on this sequence number, not their order in the list. The row that contains the first true condition is used as the assessment. Leave intervals between your sequence numbers so that you can insert additional rules later, if necessary, without having to renumber each row.
<b>Operator</b>	Select the type of comparison (greater than, less than, and so on).
<b>% of Target</b> (percentage of target)	Select the percentage of the KPIs target value to which this rule applies.
<b>Assessment ID</b>	Select the assessment ID that is used when the condition is true.

---

## **Establishing Portfolio Analysis Preferences**

To establish portfolio analysis preferences, use the User Portfolio Preferences (PPK\_USER\_PREFER) component.

This section provides an overview of the portfolio analysis preferences and discusses how to:

- Define portfolio analysis defaults.
- Specify additional measures for portfolio analysis.

## **Understanding Portfolio Analysis Preferences**

Portfolio analysis preferences are set individually by each user, and establish:

- The default business unit, scenario, portfolio tree, and time period to use for portfolio analysis.
- Any additional measures to include.

These settings are associated with the user ID that is specified at login. These options enable users to control which data they view by default when they access the Portfolio Analysis component.

**See Also**

Chapter 5, "Establishing and Analyzing Project Portfolios," page 85

## Pages Used to Establish Portfolio Analysis Preferences

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Portfolio Analysis Defaults	BC_PRJ_KPI_DFLT	Project Portfolio Management, Administration, User Portfolio Preferences, Portfolio Analysis Defaults	Specify, by user, the default business unit, scenario, portfolio tree, and time period to use for portfolio analysis.
Additional Portfolio Measures	PPK_ADDL_MSRS	Project Portfolio Management, Administration, User Portfolio Preferences, Additional Portfolio Measures	Specify, by user, up to four additional measures to view on the Portfolio Analysis page.

## Defining Portfolio Analysis Defaults

Access the Portfolio Analysis Defaults page (Project Portfolio Management, Administration, User Portfolio Preferences, Portfolio Analysis Defaults).

The screenshot shows the 'Additional Portfolio Measures' tab in the 'Portfolio Analysis Defaults' page. The page is titled 'VP of Corporate Planning' and 'VP1'. It contains three main sections: 'Business Unit', 'Scenario', and 'Portfolio Tree'. Each section has a text input field and a search icon. The 'Business Unit' field contains 'CORP1' and is linked to 'Corporation 1'. The 'Scenario' field contains 'PPM\_SCENAR' and is linked to 'Project Portfolio Scenario'. The 'Portfolio Tree' field contains 'PPK\_PORTFOLIO\_1' and is linked to 'Sample Portfolio Tree'. Below these fields is a 'Time' dialog box with two radio buttons: 'Current' (selected) and 'Choose'. The 'Choose' option is selected, and it includes a 'Year' dropdown set to '2002' and a 'Period' dropdown set to '3'.

Portfolio Analysis Defaults page

Specify the defaults to use for portfolio analysis. The system automatically displays the data from this business unit, scenario, and time period—using the specified portfolio tree—when you view the Portfolio Analysis page.

<b>Business Unit</b>	Select the default business unit to view.
<b>Scenario</b>	Select the default scenario to view.
<b>Portfolio Tree</b>	Select the default portfolio tree to view.
<b>Current</b>	Select to use the most recent assessment results.
<b>Choose</b>	Select to use the assessment results of a specified accounting period; select the specific fiscal year and accounting period.

## Specifying Additional Measures for Portfolio Analysis

Access the Additional Portfolio Measures page (Project Portfolio Management, Administration, User Portfolio Preferences, Additional Portfolio Measures).

Portfolio Analysis Defaults Additional Portfolio Measures

VP of Corporate Planning VP1

---

Additional Measure 1:  Project Risk

Additional Measure 2:

Additional Measure 3:

Additional Measure 4:

Additional Portfolio Measures page

Select up to four additional measures to include when analyzing project portfolios. These measures appear in the Additional Measures tab on the Portfolio Analysis page.

You establish measures by using the Define Measures/Dimensions page.

See [Chapter 3, "Setting Up Project Portfolio Management," Defining Measures and Dimensions, page 34.](#)



## Chapter 4

# Establishing Project Requests

This chapter provides an overview of the project request component and discusses how to:

- Create project requests and templates.
- Define estimated costs and benefits.
- Determine project request scores and manage risks.
- Analyze the impact of project requests.

---

## Understanding the Project Request Component

The pages within the Project Request component (BC\_PROJ\_REQUEST) enable you to define proposed projects so that you can evaluate how well they support your organization's strategy, determine whether their costs and benefits are acceptable, and ultimately, decide which project requests to undertake. This section discusses:

- Templates.
- Versions.
- Costs and benefits.
- Milestones.
- Scores.
- Approval workflow.

## Templates

You can define templates, and use them to create project requests that have similar characteristics and structure or that are repeated periodically. Templates can serve as identified "best practices" for certain projects or project types. The only fields that are required when you are defining a template are the business unit, the template ID, and a description; you can complete as many of the remaining fields for scoring, attachments, cost, benefits, dependency, and milestone information as you want. When establishing a project request, you can either create it from scratch or create it by using a template and then modifying or adding any necessary details.

Templates differ from project requests in the following ways:

- Templates are not involved in the project request approval workflow process.  
You can't submit templates for approval nor cancel them.
- Templates do not integrate with Program Management.
- Templates are not included in portfolio analysis.
- You cannot create versions of a template.

To maintain templates, use the Project Request component pages. When accessing the search page for the Project Request component, select the Template check box to add, update, or view a template instead of a project request. The settings that are established by using the Privileges for Project Requests and Templates page control who can create and update templates. If a user is granted edit privileges for templates, that user can create a new template or update an existing template by selecting the Template check box when accessing the Project Request component pages. If a user has view-only privileges for templates, then the Template check box does not display in Add mode, because that user can create only project requests, not templates. In Update/Display mode, that user can select the Template check box to view an existing template. The user is not able to save any changes to the template, however, they can save it as a new project request, and then modify it.

You can also create a template from an existing project request, specifying which categories of project request fields to include in the template definition. You cannot edit the start date or end date fields; however, an option is available to move cost and benefit details an appropriate number of periods.

## Versions

A proposed project request can include multiple versions so that each of the versions can be compared and analyzed before a request is approved. For example, the initial version could be "best case," in which return on investment and key business objective support scores are very high, but at the cost of high estimated costs and high risk. The second version could be a scaled-down version of the project request with less benefit for less risk. Multiple versions can exist until one is approved. At that time, the status of the remaining versions that are in pending status changes to canceled. (Versions that are already declined remain in declined status.) When you create a version, its field values automatically default to the values of the current project request; modify any field values that differ for the new version.

## Costs and Benefits

You enter estimated project request costs and expected benefits by general ledger business unit, department, and account. These amounts are the expected cash inflows and outflows that are related to the proposed effort. Optionally, you can capitalize costs, which spreads the costs evenly over three fiscal years, starting with the fiscal year and period of the first entered cost amount. The system uses these amounts to determine the return on investment for each project request.

### **See Also**

[Chapter 4, "Establishing Project Requests," Defining Estimated Costs and Benefits, page 63](#)

## Milestones

Milestones enable you to manage the progress of a project request or its defined risk elements. You associate standard milestones with project requests by using the Project Request - Milestone page. You associate risk milestones with risk elements by using the Project Request - Risk Elements page.

You define milestones independently of project requests by using the Milestone page.

### **See Also**

[Chapter 3, "Setting Up Project Portfolio Management," Understanding Milestones, page 27](#)

[Chapter 3, "Setting Up Project Portfolio Management," Defining Milestones, page 32](#)

## Scores

Score groups enable you to associate objectives and risks with a project request for the purpose of generating scores that indicate how well the project request meets the objectives or how much it is at risk. These scores provide a comparative measurement for all of the project requests within a given portfolio and help determine which project requests to approve.

You can define two score groups for a project request, one for evaluating risk and another for evaluating other scores that you want to compare during portfolio analysis, including key business objective (KBO) support. Ideally, your organization identifies standard KBOs, and all project requests that are grouped into a portfolio are associated with the same score groups so that the scores are a true comparison. Score groups are based on a scorecard portfolio definition, and the rows within a score group are derived from the nodes of the tree on which the portfolio is based. Each row of a score group is referred to as a risk category (for the risk score group) or category (for the other score group).

Because groups are based on a scorecard portfolio, you can weight the relative importance of each of the risk categories that compose the score group. The weighting is considered when the system determines the score.

The risk score group has additional functionality to help manage risks. Risk elements can be associated with each risk category within the risk score group, and risk milestones can be assigned to each risk element. These milestones can have an impact on the net score for primary risk, depending on the probability that they will occur and their current status.

### **See Also**

[Chapter 4, "Establishing Project Requests," Determining Project Request Scores and Managing Risks, page 67](#)

## Approval Workflow

When a project request is submitted for approval, it triggers a business process event that places the work item on the worklist of the person who is identified in the Approver field on the Project Request page. Only users who are associated with the PPM Approver role can approve, decline, return, or cost a project request. After the approver performs one of these four actions, the work item is removed from the approver's worklist.

The steps that occur during the workflow procedure for project request approvals are:

1. A user creates and saves a new project request, but does not submit it.

Based on the initiative type that the user enters for the project request, the owner and approver fields are populated automatically on the Project Request page.

The system initially sets the status to *Pending*.

2. The user submits the project request for approval by clicking the Submit button on the Project Request page.

The system updates the status to *Submitted*.

3. The system sends the project request to the approver's worklist.
4. The approver views the worklist and clicks the project request link to review it.

## 5. The project request approval page appears.

The approver selects one of these options:

**Approve**

Approves (or operationally approves) the project request.

When this option is selected, the system responds in one of these ways, depending on whether funding department manager approval is required:

- If funding department manager approval is required:

The system updates the status to *Operationally Approved*, which indicates that the project request is approved from one perspective only. Then the system routes the project request to the worklist of every manager whose department appears on the Project Request component's Cost page. Assuming that each of these managers has adequate spending authority, which is defined in PeopleSoft Workflow Virtual Approver, they all must approve the request for its status to change to approved.

If any one of the funding department managers denies the project request, the system changes the status to *Declined* and does not allow the project request to be resubmitted.

If any of the funding department managers changes the project request status to *Returned*, the system starts the approval process over again, and PeopleSoft Workflow routes the project request back to the worklist of the initial requester of the project. The project requester can resubmit a returned project request; however, all of the same approvals are still required, assuming that the amount of the estimated costs does not change enough to cause higher or lower levels of spending authority by the approvers.

- If funding department manager approval is not required:

The system updates the project request status to *Approved* and either generates a new project with a processing status of *Active*, or, if a project already exists, updates the status of the project to *Active*. If any other versions of the project request exist, the system automatically sets them to a status of *Declined*, sets their associated projects to a processing status of *Inactive*, and cancels any labor resource assignments for those projects. The only exception to this occurs when the approver does not have adequate authority to approve the amount of the project request's estimated costs. In this case, PeopleSoft Workflow's Virtual Approver locates the manager of the initial approver and routes the request to the manager for approval.

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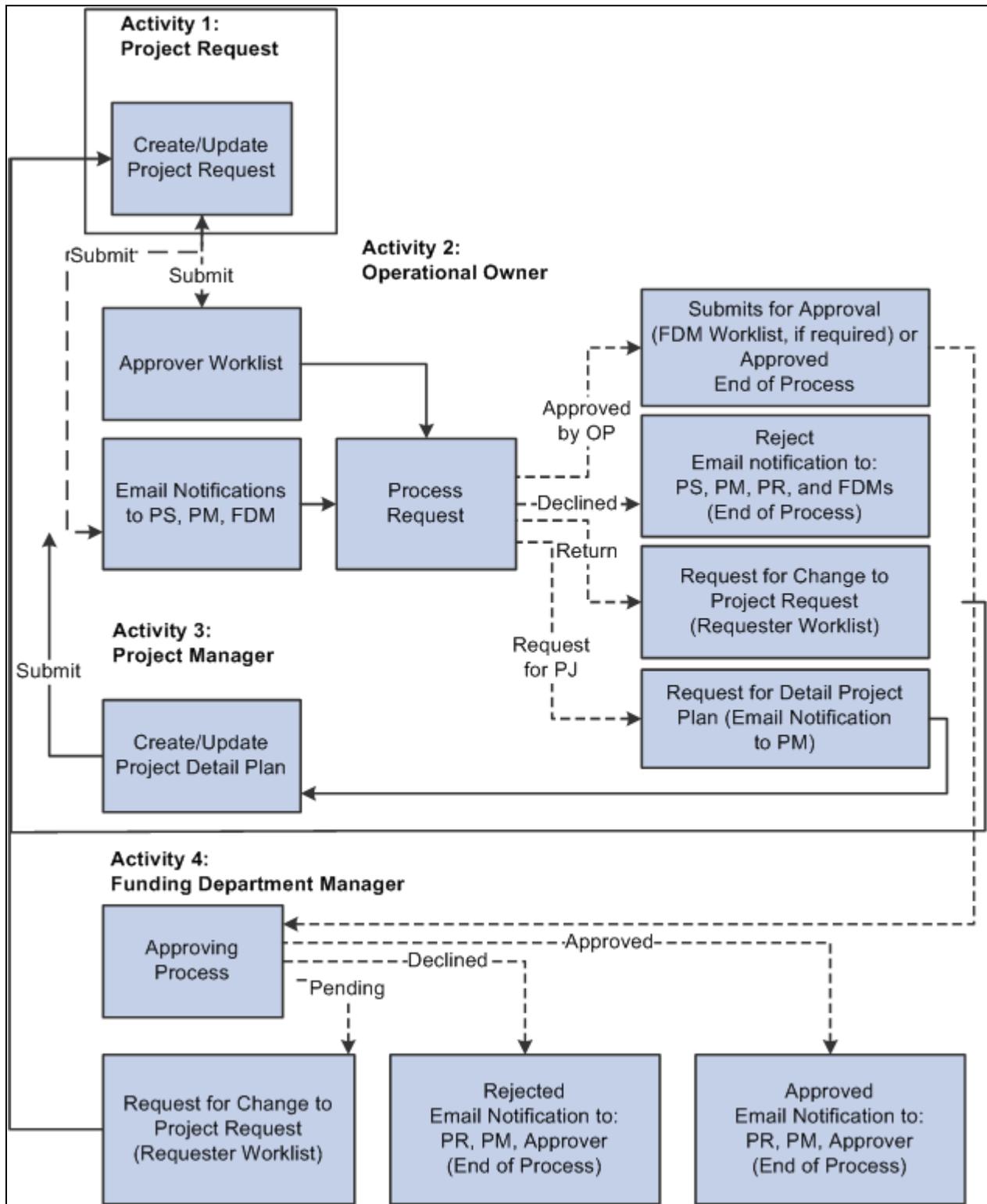
**Note.** You establish whether funding department manager approval is required when you establish workflow options by using the PPM Preferences (BC\_GENERAL\_PREF) component.

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See [Chapter 3, "Setting Up Project Portfolio Management," Specifying Workflow Options, page 20.](#)

<b>Return</b>	<p>Returns the project request to the individual who is identified as the requester on the project request.</p> <p>The system updates the project request status to returned and adds it to the worklist of the requester for rework. If anyone resubmits the request, the approval process starts over from the beginning.</p>
<b>Decline</b>	<p>Denies the project request.</p> <p>The system updates the project request's status to declined. If integration with Program Management is enabled, the system also changes the processing status of any corresponding projects in Program Management to inactive (if an associated project exists), and changes any resource assignments for the project to a status of <i>Canceled</i>.</p>
<b>Cost</b>	<p>Indicates that detailed cost information is required. The system sends the project request to Program Management for cost details, routing the project request to the project manager, and updates the project request status to <i>Costing</i>.</p> <p>This signifies that the project manager must create a detailed plan by using the various project planning tools that are in Program Management. When the plan is complete, the project manager clicks the Send to Project Request button by using the Project Request Estimate Summary page in Program Management. The system subsequently updates the project request status to <i>Submitted</i>, triggering a message on the project request to indicate that a detail plan is created, and routes the project request back to the worklist of the designated approver.</p>

The following diagram provides a graphical depiction of the project request approval workflow and its impact on the project request status, as described in this section:



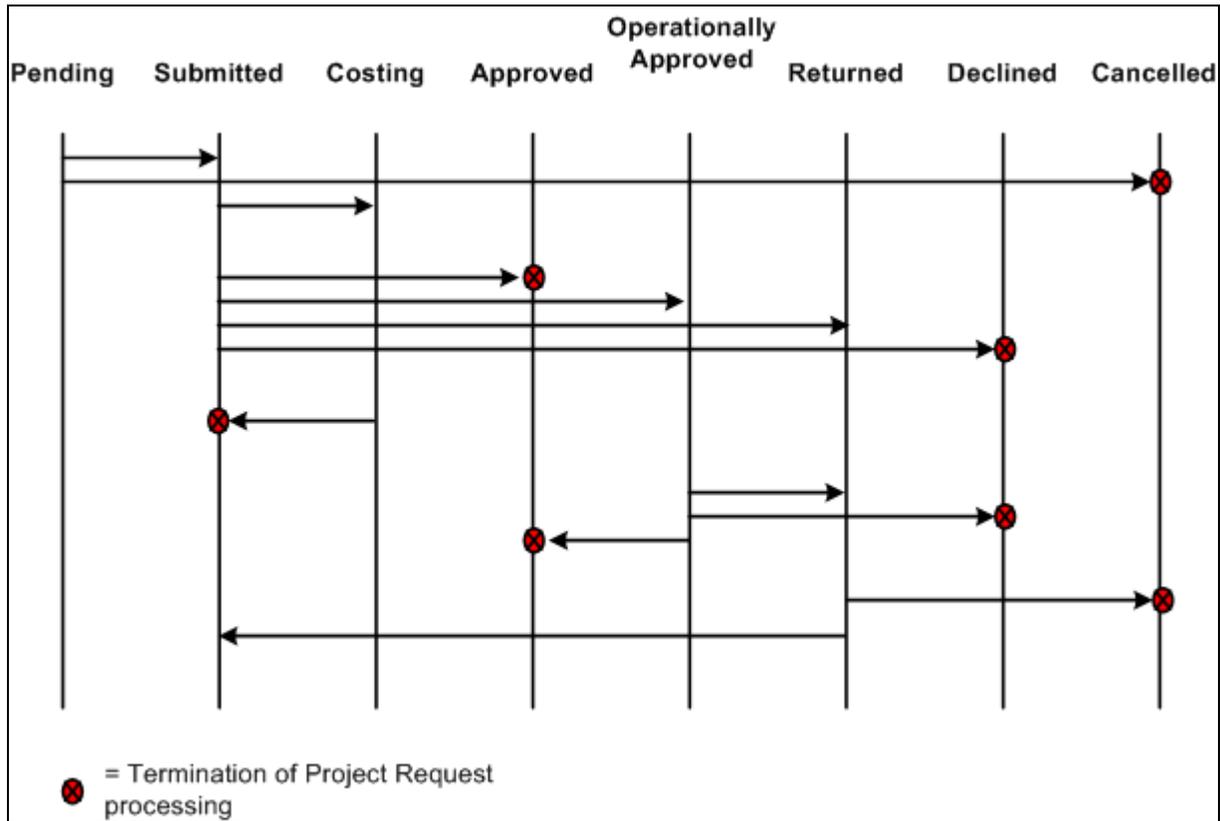
Project request approval workflow

This table provides a key for the abbreviated roles that are in the project request workflow diagram:

**PS** Project sponsor

- PM** Project manager
- PR** Project requester
- FDM** Funding department manager

This diagram shows the possible status values that a project request can assume given its current status:



Project request status values

**See Also**

[Appendix A, "Delivered Workflows for Project Portfolio Management," page 113](#)

## Creating Project Requests and Templates

To create project requests and templates, use the Project Requests (BC\_PROJ\_REQUEST1) component.

This section provides an overview of the options that are available for creating project requests and templates and discusses how to:

- Establish project requests and templates.

- Add file attachments.
- Define relationships to other project requests.
- Assign milestones.
- Review approval status history.
- Update approval status.
- Specify save options.
- Adjust dates.
- Resolve issues.

## Understanding the Options That Are Available for Creating Project Requests and Templates

The following options are available to create project requests and templates:

- Create a new project request from scratch.
- Create a new template from scratch.
- Create a new project request from a template.
- Create a new project request from an existing request.
- Create a new template from an existing project request.
- Create a new template from an existing template.

Established security controls whether given individuals can use each of these options. If they are granted the privilege to edit templates, they can create new templates or update existing templates. If they only have view privileges for templates, they cannot create new templates; if they open a template, they cannot edit it, but they can create a new request from that template.

When you create a new template or project request from an existing template or project request, you specify which fields to include by using the Save Options page. Also, if the estimated start or finish dates fall within a different fiscal period than those of the originating template or project request, you can specify whether to move associated costs or benefits accordingly by using the Project Request Date Change Options page. Similarly, if you modify any associated costs or benefits such that they occur during a fiscal year and period that is outside of the date range that is defined by the estimated start and end dates, the system enables you to move either or both of those dates by using the Project Request Date Change Options page.

Before you can save the new project request, the system performs validation checks for the data, and if any errors exist, the Project Request Validation Errors page automatically appears, with links that enable you to navigate to the source of each error. All errors must be resolved before you can save the project request.

## Pages Used to Create Project Requests and Templates

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Project Request	BC_PROJ_REQUEST1	Project Portfolio Management, Project Requests	Create project requests and templates.
Project Request - Attachments	BC_PROJ_ATTACH	Project Portfolio Management, Project Requests, Attachments	Associate file attachments with a project request.
Project Request - Dependency	BC_PRJREQST_DPN	Project Portfolio Management, Project Requests, Dependency	Designate project requests upon which the current project request depends and view project requests that depend on the current project request.
Project Request - Dependency Comments	BC_PRJREQST_DPN_CM	Click the Comments button on the Project Request - Dependency page.	Enter comments about a dependency relationship.
Project Request - Milestones	BC_PRJREQST_MST	Project Portfolio Management, Project Requests, Milestones	Enter project request milestones and indicate their status.
Project Request - Status History	PPK_PROJREQ_AUD	Project Portfolio Management, Project Requests, Status History	Review an audit trail of workflow approval status entries for the project request.
Project Approval	BC_PRJ_APPROVAL	This page is automatically accessed when a user selects a project request from the worklist.	Modify the approval status for a project request.
Save Options	PPK_SAVE_OPTIONS	Click Save As on the Project Request page	Saves a project request or template as either a new project request or a new template.
Project Request Date Change Option	BC_EST_DATE_CHANGE	Click the Move button on the Project Request - Costs page or the Project Request - Benefits page. This page appears automatically if you change the project request's estimated start date or estimated end date to a date that is in a different fiscal period.	Advance or delay a project request's estimated start date, estimated end date, or dates that are associated with costs and benefits.

Page Name	Definition Name	Navigation	Usage
Project Request Validation Errors	PPK_ERROR_REPORT	Appears automatically if errors occur when you attempt to save a project request.	Review project request errors and correct them by linking to the page upon which each error occurs.

## Establishing Project Requests and Templates

Access the Project Request page (Project Portfolio Management, Project Requests).

### Project Request page

The fields that are available on this page depend on whether the current record is a project request or a template; the ID field label will be either Project Request or Template, accordingly.

**Business Unit** Specify the business unit that is associated with this project request or template.

**Project Request or Template** If this field is available for entry, specify the ID for the project request; otherwise, the system automatically generates the ID. The preferences that are established when you use the Project Request ID Sequencing page determine whether IDs are generated automatically.

See [Chapter 3, "Setting Up Project Portfolio Management," Defining How the System Generates Project Request IDs, page 16.](#)

**Base Currency** Displays the business unit's base currency.

### ***Request Details***

**Requester** Displays the name of the user that created the project request. This field is unavailable for entry.

**Priority** Select the project request's priority.  
You establish priorities by using the Priorities page.  
See [Chapter 3, "Setting Up Project Portfolio Management," Defining Project Request Priorities, page 31.](#)

**Estimated Start, Estimated End, and Desired Finish** Enter the corresponding project request dates. The system uses these dates to determine present value (PV), and the estimated start and estimated end dates are used to generate the project's start date and end date, respectively, if the project request results in a project.



Click the Choose a date button to make a selection in date fields.

**Initiative Type ID** Select an initiative type identifier that classifies the type of work that is needed. This field is required if you are integrating with Program Management; otherwise, it is optional.

When you select the initiative type, the system automatically populates the Owner and Approver fields, based upon the Initiative Type table.

You establish initiative types by using the Initiative Type page.

See [Chapter 3, "Setting Up Project Portfolio Management," Defining Initiative Types, page 32.](#)

**Status**

Displays the current status of the project request.

This field is display-only for all status values except approved, and its value is either assigned by the system when an individual creates, submits, approves, declines, costs, or returns a project request, or assigned by a project approver using the Project Request Approval page.

Possible status values are:

*Pending:* Indicates that the project request is created, but not yet submitted. The system assigns this status when the project request is first saved.

*Submitted:* Indicates that the project request has been submitted and is waiting for the approver to take action on it. This value is assigned:

- By the system (using workflow) when the Submit button is clicked.
- By the system (using workflow), for project requests that are in costing status, when a project manager clicks the Send to Project Request button, which is on the Project Request Estimate Summary page in PeopleSoft Program Management.

*Costing:* Indicates that the project request has been sent to a project or program manager to obtain a more precise cost estimate before a decision is made to approve or decline the request. A project approver can modify the status of a project request to *Costing* only when its current state is *Submitted* and when the cost estimate that is entered by the requester needs further validation by the project or program manager.

*Operationally Approved:* Indicates that the project request is submitted, approved by the owner, and awaiting funding department manager approval. This status is available only when funding department manager approval is activated at the installation level. If funding department manager approval is required, then when an owner approves a request, its status changes to operationally approved instead of being changed directly to approved.

*Approved:* Indicates that the project request was submitted and has been approved by the owner. The system automatically changes the status of any other versions of the project request to canceled. When a project request is approved, if you have edit access for approved project requests, the only value that you can change the status to is *Canceled*.

*Canceled:* Indicates that the project request is canceled. A project request can be canceled only when its current status is either pending, returned, or approved. After a project request has a *Canceled* status, its status cannot change.

*Declined:* Indicates that the project request is submitted but denied approval. Either the project request approver or a funding department manager can deny a project request. After a project request has a *Declined* status, its status cannot change.

*Returned:* Indicates that the project request is submitted, and that the approver or a funding department manager returned it to the user who submitted it for additional work. The system assigns this status by using workflow. To continue processing a returned request, click the Submit button to start the approval process again.

<b>Investment Type</b>	Select an investment type from the values that are in the drop-down list box to describe the nature of the project request .  This field is used for informational purposes only.
<b>Department</b>	This field is used for informational purposes only and is the department of the individual whose name is entered in the Requester field that is on the project request. This department value is not the department to which costs or benefits are attributed. You attribute costs and benefits with a specific department by entering them using the Costs and Benefits pages that are within the Project Request component (BC_PROJ_REQUEST).
<b>Project Manager</b>	Select the name of a project manager, if this position is determined. This field is required when an approver changes the project request status to costing.
<b>Integration Template</b>	This field is required if you are integrating with PeopleSoft Program Management; otherwise, it does not appear. Integration templates are defined in Project Costing, and they are populated in Program Management during the extract, transform, and load (ETL) process. When a project request has a PeopleSoft Program Management project ID associated with it, this field becomes display-only.  <i>See PeopleSoft Project Costing PeopleBook: Structuring PeopleSoft Project Costing: "Creating Templates for Integration with Other Applications"</i>
<b>Project ID</b>	Click this link to access the General Information page (PROJECT_GEN_01A) in Program Management. This link is available only if Program Management integration is enabled, workflow is enabled, and the project request status is either costing or approved.

### ***Approval Information***

The fields that are in this group box are used by approval workflow, which is activated when you submit a project request for approval.

<b>Sponsor</b>	Select the person who is endorsing this project request.  Depending on the installation settings for workflow, this individual may receive email notifications as the project request status changes.
<b>Owner</b>	The name of the person who is primarily responsible for project requests of a specific type. The system automatically populates this field with the owner of the associated initiative type; it uses the Initiative Type table to identify the name of the individual. The Owner field is display-only prior to when the project request is submitted for approval, at which time it becomes editable so that the owner can change ownership responsibility to another individual, if that's appropriate.  Depending on the established installation-level workflow options settings, the individual whose name appears in this field may receive workflow email notifications.

**Approver**

The system automatically populates this field with the value in the Owner field when a project request is created and saved. When the project request is submitted, this field becomes editable so that the project owner can change the approver to another individual, if it's appropriate.

If the installation option for workflow is enabled, PeopleSoft Workflow routes project requests to the worklist of the individual who is identified as the approver under these conditions:

- A project request is submitted.
- A project manager changes a project request with a status of costing to a status of submitted by clicking the Send to Project Request button on the Project Request Estimate Summary page.

**Owning Department**

The system automatically populates this field with the department of the individual who is identified in the Owner field.

This field is used only for information.

**Costs and Benefits**

This group box displays calculated costs and benefits information.

**Viewing Currency**

Select how to view monetary amounts for costs and benefits. This option affects the amounts that are on the Project Request page and the Summary Cost/Benefits page, and enables you to toggle the displayed currency between the specified project request transaction currency and the business unit's base currency. If the business unit's base currency and the project request transaction currency are the same, the amounts do not change. Options are:

**Transaction Currency:** Select to view amounts in the currency that is selected in the Currency field.

**Base Currency:** Select to view amounts in the base currency of the business unit that is associated with the project request.

**Currency**

Select the transaction currency for the project request. This is the currency that is used for all amounts that are entered for this project request.

The default value for this field is the base currency for the associated business unit.

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**Note.** If cost or benefit details exist on the Project Request component's Costs or Benefits pages, you cannot change the currency without first deleting that cost and benefit data.

---

**Costs and Benefits**

Displays the current costs and benefits for the project request. Use the options for Viewing Currency to view the amounts in either the transaction currency or the base currency.

**On-going Maintenance Cost** Enter the annual costs that you expect the project request to incur in perpetuity after the project request's estimated end date. Enter a value only if you anticipate incurring costs year after year beyond the estimated end date. The amount that you enter must be in the transaction currency of the project request, and you can enter a value only when the viewing currency is set to transaction currency.



Click to access the Project Requests - Costs or Project Requests - Benefits page, where you can maintain details for the costs or benefits that are associated with this project request.

**Net Present Value** Displays the net present value for this project request, which is calculated as  $(Present Value of Benefits) - (Present Value of Costs)$ .

**Return on Investment** Displays the return on investment for this project request, which is calculated as  $((Present Value of Benefits) \div (Present Value of Costs)) - 1) \times 100$

**PV of Benefits (Present Value of Benefits)** Displays the present value of all benefit amounts for this project request.

**KBO Support (key business objective support)** Shows the calculated score for the KBO support score group.  
You must associate the *Primary KBO* portfolio with the project request by using the Scoring page for the system to populate this field.

**Risk** Shows the calculated score for the Primary Risk score group.  
You must associate the *Primary Risk* portfolio with the project request by using the Scoring page for the system to populate this field.

### ***Project Request Versions***

This grid appears only if you have created multiple versions of a project request. It includes a row for each version that lists its project request ID, description, and status, and the project request ID of the project request of which it is a version

Click a project request ID to view that version. The project request ID of the currently viewed version is display-only.

### ***Actions***

**Submit** Click to submit a pending or returned project request for approval.  
This option is not available for templates.

**Cancel** Click to cancel the project request. This button is available only when the status of the project request is returned or pending.  
This option is not available for templates.

<b>Create a New Project Request Version</b>	Click to create a new version of this request. This button is available only when the status of the project request is pending, submitted, declined, returned, or costing.  The system creates a new project request with several of the fields populated with values that are from the original project request. Edit the values that differ for this version, add new values, and then save or submit the project request.
<b>Save As</b>	Click to save the template or project request as a new project request or template by using the Save Options page.

## Adding File Attachments

Access the Project Request - Attachments page (Project Portfolio Management, Project Requests, Attachments).



Click the Add Attachment button to browse for and select a file.

For example, you can attach a project plan, cost spreadsheet, flowchart, or request for proposal to this project request.



Click the Delete Attachment button to remove an attached file.



Click the View Attachment button to download and view the attachment in a new window. If the attachment is a media file, clicking the button opens the appropriate media player (if available) and plays the attachment automatically.

## Defining Relationships to Other Project Requests

Access the Project Requests - Dependency page (Project Portfolio Management, Project Requests, Dependency).

Use this page to identify other project requests upon which this request depends. If other project requests are dependent on this request, they appear in the Project Requests dependent upon this Project Request grid. This data is used only for informational purposes.

**Required** Select this option to indicate that the Project Request ID in the row is mandatory for this project request.



Click the Comments button to access the Dependency comments page, where you can add comments that describe the rationale and impact of the dependency.

## Assigning Milestones

Access the Project Request - Milestones page (Project Portfolio Management, Project Requests, Milestones).



Project Request - Milestones page

**Create New Milestone** Click to access the Milestone page, where you can add a new milestone definition.

Insert rows as needed to document project request milestones.

**Milestone ID** Select the project request milestone.

**Owner** Displays the individual who is responsible for this milestone.

**Due Date** Displays the due date for this milestone.

**Milestone Status** Displays the current status of the milestone.

**See Also**

Chapter 3, "Setting Up Project Portfolio Management," Understanding Milestones, page 27

## Reviewing Approval Status History

Access the Project Request - Status History page (Project Portfolio Management, Project Requests, Status History).



Project Request - Status History page

This page displays all status changes for the life cycle of the project request and any comments that the approver makes during the workflow approval process. In addition, you can insert comments on this page to have them date and time stamped. After a comment is entered here, the system does not allow it to be edited.

## Updating Approval Status

By using your worklist, access the Project Approval page.

Enter comments to document the action that you are taking, and then click the appropriate button.

<b>Approve</b>	Click to approve the project request. To approve a project request, you must provide estimated costs.
<b>Decline</b>	Click to decline the project request.
<b>Return</b>	Click to send the project request back to the worklist of the submitter for additional work.
<b>Cost</b>	Click to send the project request to PeopleSoft Program Management for the purpose of creating a detailed cost estimate for the project request. The Cost button does not appear if you have not selected the PeopleSoft Program Management Enabled check box that is on the Integration page. To send a project request for costing, estimated costs and a project manager are required.

### See Also

[Chapter 4, "Establishing Project Requests," Approval Workflow, page 43](#)

[Chapter 3, "Setting Up Project Portfolio Management," Defining Integration Settings, page 21](#)

## Specifying Save Options

Access the Save Options page (click Save As on the Project Request page).

Save Options page

**Save as** Select whether to save this as a project request or template. The options that you can select depend on the security that you have.

**New ID** Enter the identifier for the new project request or template. This field is not available for entry if system preferences are set to automatically generate IDs.

**Save Project Request Sections** Select which data from the original project request or template to include in this new project request or template.

The following table lists which fields are saved for each option.

<b>Option for Save Project Request Sections</b>	<b>Fields</b>
Request Details	Business Unit
	Investment Type
	Initiative Type ID
	Owner
	Approver

<b>Option for Save Project Request Sections</b>	<b>Fields</b>
	Start Date (project requests only, not templates)
	End Date (project requests only, not templates)
	Priority (project requests only, not templates)
	Desired Finish (project requests only, not templates)
	Project Manager (project requests only, not templates)
	Base Currency
	Currency
Maintenance Cost	Maintenance Cost
Scoring	Score Group
	Score Type
	Gross Score
	Net Score
	Overall Score
	Risk Level
	Adj. (+/- %)
	Support Level
Attachments	Attached File
	Description
	Approver
	Owner
	Owning Department
Costs	Rate Type
	Cost Detail fields: GL Unit, Department, Account, Year, Period, Amount, Capitalize
Benefits	Rate Type

Option for Save Project Request Sections	Fields
	Cost Detail fields: GL Unit, Department, Account, Year, Period, Amount, Capitalize
Milestones	Milestone ID

## Adjusting Dates

Access the Project Request Date Change Option page (click the Move button on the Project Request - Costs page or the Project Request - Benefits page).

**Project Request Date Change Option**

Business Unit: CORP1 Corporation 1 Base Currency: US Dollar  
 Project Request: 200065 Hosted Training  
 Estimated Start: 12/29/2002 Estimated End: 01/22/2003

\*Direction: Delay   
 No of Periods: 
 Move Costs  
 Move Benefits  
 Move Estimated Start Date  
 Move Estimated End Date

Project Request Date Change Option page

- Direction** Specify how to move the dates. Options are:  
*Delay:* Select to shift dates to the past by a specified number of periods.  
*Advance:* Select to shift dates to the future by a specified number of periods.
- No of Periods** (number of periods) Enter how many fiscal periods to advance or delay the dates.
- Move Costs** Select to move the cost details by the specified number of periods.
- Move Benefits** Select to move the benefit details by the specified number of periods.
- Move Estimated Start Date** Select to move the estimated start date by the specified number of periods.
- Move Estimated End Date** Select to move the estimated end date by the specified number of periods.

The options that are selected by default when you access this page depends upon the source of the page activation:

- If you access the page by clicking the Move button on the Project Requests - Costs page, the value in the No of Periods field becomes 0 by default and the Move Costs check box is selected.
- If you access the page by clicking the Move button on the Project Requests - Benefits page, the number of periods becomes 0 by default and the Move Benefits check box is selected.
- If the page appears automatically because of a change to the estimated start date, the Move Estimated Start Date check box is unavailable for entry, all of the other options are selected, and the value in the No of Periods field by default becomes the number of periods by which the estimated start date has changed.
- If the page appears automatically because of a change to the estimated finish date, the Move Estimated Finish Date check box is unavailable for entry, all of the other options are selected, and the value in the No of Periods field by default becomes the number of periods by which the estimated end date has changed.

## Resolving Issues

The Project Request Validation Errors page appears automatically if errors occur when you try to save a project request.

To resolve an error, review the message text, and then click a link in the Context column to access the field that is causing the error.

---

## Defining Estimated Costs and Benefits

This section discusses how to:

- Establish estimated costs.
- Establish estimated benefits.
- Review costs and benefits.

## Pages Used to Define Estimated Costs and Benefits

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Project Request - Costs	BC_EST_COST	Project Portfolio Management, Project Requests, Cost	Enter estimated cost details for a project request.
Cost Comments	BC_EST_COST_COM	Click the Comments button on the Project Request - Costs page.	Enter comments about cost estimates.

Page Name	Definition Name	Navigation	Usage
Project Request - Benefits	BC_EST_BENFT	Project Portfolio Management, Project Requests, Benefits	Enter estimated benefit details for a project request.
Benefit Comments	BC_EST_BENFT_COM	Click the Comments button on the Project Request - Benefits page.	Enter comments about benefit estimates.
Project Request - Summary Costs/Benefits	BC_EST_COST_BENFT	Project Portfolio Management, Project Requests, Summary Costs/Benefits	View a summary of the costs and benefits, by general ledger business unit and department, for a project request. Navigate to the Project Request Analysis by Department component.
Project Request Cost Details	BC_COST_DET	Click an estimated cost amount on the Project Request - Summary Costs/Benefits page.	Review cost details for a department.
Project Request Benefit Details	BC_BENFT_DET	Click an estimated benefit amount on the Project Request - Summary Costs/Benefits page.	Review benefit details for a department.

## Establishing Estimated Costs

Access the Project Request - Costs page (Project Portfolio Management, Project Requests, Cost).

Project Request										
Scoring Attachments Costs Benefits Dependency Milestones Summary Costs/Benefits Status History										
Business Unit:		CORP1 Corporation 1		Base Currency:		US Dollar				
Project Request:		12344 Customer1		Estimated Start:		07/23/2002 Estimated End: 07/23/2002				
Cost Details										
Customize Find View All First 1-3 of 3 Last										
*GL Unit	*Department	Description	Account	Description	*Year	*Period	*Amount	Currency	Capitalize	
CORP	10900	Education Services	000000001		2002	7	\$8,888.00	USD	<input type="checkbox"/>	+ -
CORP	20000	Sales Administration	000000011		2002	7	\$100.00	USD	<input type="checkbox"/>	+ -
CORP	21000	Eastern Sales Region	000000006		2002	7	\$2,000,000.00	USD	<input type="checkbox"/>	+ -
Update Amount		Move		Total Estimated Costs:		\$2,008,988.00 US Dollar				

Project Request - Costs page

### **Cost Details - Details Tab**

Enter cost information that is related to the project or program request. The currency of the entered amounts is specified in the Currency field on the Project Request page. Costs are entered for the specified GL business unit. Add rows to enter all costs that are associated with the project.

<b>GL Unit</b> (general ledger unit)	Enter the GL business unit that is associated with this cost.
<b>Department</b>	Select the department that is associated with this cost. Only departments of the specified GL unit are valid.
<b>Account</b>	Select the account to which the cost is attributed. Only accounts of the specified GL business unit are valid.
<b>Year and Period</b>	Enter the fiscal year and period in which the cost is incurred.
<b>Amount</b>	Enter the cost amount in the currency of the project request. The currency code appears next to the amount field.
<b>Capitalize</b>	Select to distribute the costs evenly across three fiscal years. Depending on how your accounting calendar is defined, this can be the equivalent of 36 months, or 12 quarters, for example. The system distributes the costs using the accounting period of the earliest entered cost as the initial capitalization period. The estimated finish is not used to determine the final distribution, so if the time period that is estimated for the project is less than three fiscal years, the system distributes costs past the estimated finish date.

### **Cost Details - Base Currency Tab**

Select this tab to view costs in the base currency of the business unit that is associated with the project request.



Click the Comments button to access the Cost Comments page, where you can enter notes pertaining to this cost estimate.

---

**Note.** If a project request has comments that are entered in the Cost Details grid, and an approver changes the project request status to *Costing*, the comments are lost when the project manager ultimately updates the project request with the revised cost estimate. To ensure that comments are always maintained, users should either enter brief comments on the Status History page of the project request component or attach a business justification on the Project Request - Attachments page of the project request component.

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### **Actions**

<b>Update Amount</b>	Click to update the amounts on the main project request page based on the data that is entered on the Project Request - Costs page.
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**Move**

Click to access the Project Requests Date Change Option page, where you can advance or delay the dates for the costs or benefits for a project request by a specified number of fiscal periods and indicate whether to move the estimated start and end dates accordingly.

**Establishing Estimated Benefits**

Access the Project Request - Benefits page (Project Portfolio Management, Project Requests, Benefits).

Enter the expected benefits for the project request, by GL business unit, department, and account, adding rows as needed. The fields that are on this page operate the same as the fields that are on the Project Request - Costs page.

See Chapter 4, "Establishing Project Requests," Establishing Estimated Costs, page 64.

**Reviewing Costs and Benefits**

Access the Project Request - Summary Costs/Benefits page (Project Portfolio Management, Project Requests, Summary Costs/Benefits).

Project Request		Scoring	Attachments	Costs	Benefits	Dependency	Milestones	Summary Costs/Benefits	Status History
<b>Business Unit:</b>	CORP1	Corporation 1		<b>Base Currency:</b>	US Dollar				
<b>Project Request:</b>	12344	Customer1		<b>Currency:</b>	US Dollar				
<b>Estimated Start:</b>	07/23/2002		<b>Estimated End:</b>	07/23/2002					
Summary of Costs and Benefits							Customize	Find	View All
GL Unit	Department	Description	Estimated Costs	Estimated Benefits	Net Benefits	View Proj Req Analysis by Dept	First 1-4 of 4 Last		
CORP1	10900	Education Services	\$8,888.00		\$-8,888.00				
CORP1	20000	Sales Administration	\$100.00		\$-100.00				
CORP1	21000	Eastern Sales Region	\$2,000,000.00		\$-2,000,000.00				
	Total		\$2,008,988.00	\$0.00	\$-2,008,988.00				
<b>Present Value of Benefits:</b>					\$0.00				
<b>Net Present Value:</b>					\$-2,008,988.00				
<b>Return on Investment:</b>					-100.000%				

Project Request - Summary Costs/Benefits page

This page provides a summary of the current estimated costs, estimated benefits, and net benefits for the project request, by GL business unit and department.

**Estimated Costs**

Click to access the Project Request Cost Details page, where you can view all of the costs that are associated with the current department for this project request.

**Estimated Benefits**

Click to access the Project Request Benefits Details page, where you can view all of the benefits that are associated with the current department for this project request.



Click the View Proj Req Analysis by Dept. (view project request analysis by department) button to access the Project Request Analysis by Department component, where you can view detailed cost and benefit information. The Project Request Analysis by Department component appears with the associated department and project request preselected for analysis.

**See Also**

[Chapter 4, "Establishing Project Requests," Analyzing the Impact of Project Requests, page 76](#)

## Determining Project Request Scores and Managing Risks

This section provides an overview of project request scoring and discusses how to:

- Define score group portfolios.
- Rank the importance of score group components.
- Score project requests.
- Associate risk elements with risk categories.

**See Also**

*PeopleSoft Enterprise Scorecard 9.1 PeopleBook, "Setting Up Portfolios"*

## Understanding Project Request Scores

The Project Requests - Scoring page enables you to associate portfolio-based score groups for risk and KBO support with a project request so you can rank how well the project request supports each of the components within a score group. The system uses this information to generate scores that indicate the level of risk or support.

To calculate risk and KBO support for a project request, you must define at least two portfolios, one for the KBO support score group and another for the primary risk score group. You establish these portfolios by using the Portfolio Definition component (BC\_PORTFOLIO\_DFN). The trees upon which these portfolios are based define the risk and KBO components that are used to score the project requests. The delivered portfolios for primary risk and KBO support are PM\_RISK and PM\_KBO\_SUPPORT. You can use the delivered portfolios, modifying them as necessary to suit the implementation, or create your own. Ideally, when you implement the system, you will create standardized portfolios for primary risk and KBO support for use by your organization, then use them to generate the project request scores. The only pages within the Portfolio Definition component that apply to scoring project requests are the Portfolio Definition page and the weighting page.

You must complete the Component Weighting page for the portfolios that are used for the score groups for the system to calculate a score. On the Component Weighting page, you rank the relative importance of each component that is in the portfolio; this determines the relative weight value for each component. On the Project Request - Scoring page, you rank how well a project request supports each component in the Support field. To determine the scores, the system multiplies the relative weight value for each component by the support value for each component, then sums these values to compute the total gross score. You establish the numerical values that are used for each rank by using the Component Ranking Definition page in PeopleSoft Enterprise Scorecard.

### **Risk Score Adjustments**

You can make adjustments to the calculated risk scores to reflect mitigating factors that impact the level of risk for a particular risk category. You can enter these adjustments manually as positive or negative percentages. The system also calculates adjustments if risk elements with milestones are associated with a risk category. After a milestone is associated with a risk element, the milestone's probability affects the net score of that component, and hence the overall net score of the project request. The calculation for the net adjustment for each risk category is:

$$(Net\ Adjustment) = ((Manual\ Adjustment\ Percentage) \times (Average\ Probability\ of\ all\ Milestones)) \times (Gross\ Score)$$

The system tracks the following scores for risks:

- Gross score.

The system-calculated score that is a measurement of the level of risk for each risk category, without any adjustments. This is calculated as the relative weight value for each component multiplied by the support value for each component.

- Net score.

The risk score that reflects all adjustments. This is calculated as the gross score plus any net adjustments.

## **Pages Used to Determine Project Scores and Manage Risks**

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Establish a tree that contains the categories against which to score project requests.
Portfolio Definition	BC_PORTFOLIO_DFN	Project Portfolio Management, Portfolios, Create/Edit Portfolios, Portfolio Definition	Establish a portfolio for use in scoring project requests.
Portfolio Definition - Component Weighting	BC_PORTFLIO_CMP	Project Portfolio Management, Portfolios, Create/Edit Portfolios, Component Weighting	Rank the relative importance of the categories that compose a score group

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Project Request - Scoring	BC_PRJREQST_PORT	Project Portfolio Management, Project Requests, Scoring	Associate score group portfolios with a project request and generate scores.
Risk Elements	PPK_PR_RISK_ELEM	Click Edit Risk Elements on the Project Requests - Scoring page.	Associate risk elements and milestones with risk categories.
Risk Element	PPK_RISK_ELEMENT	Click Create New Risk Element on the Project Requests - Scoring page.	Define risk elements.
Risk Element Comment	PPK_PR_RISK_COM	Click a comments icon on the Risk Element page.	Enter comments about a risk element.
Milestone	PPK_MILESTONE	Click Create New Milestone on the Project Requests - Scoring page.	Define milestones.

## Defining Score Group Portfolios

Access the Portfolio Definition page (Project Portfolio Management, Portfolios, Create/Edit Portfolios, Portfolio Definition).

The screenshot displays the 'Portfolio Definition' page with the following details:

- SetID:** SHARE
- Portfolio ID:** PM\_RISK
- \*Effective Date:** 01/01/1990
- \*Status:** Active
- \*Description:** Risk-Relative Weighting Matrix
- \*Tree Name:** PM\_RISK
- Notes:** (Empty text area)

Portfolio Definition page

### Tree Name

Specify the tree that contains the score group components against which you will score your project requests. To generate scores for both risk and KBO support, you must define one portfolio for risk and one for KBO support. The trees are made up of nodes that define each category.

## Ranking the Importance of Score Group Components

Access the Portfolio Definition - Component Weighting page (Project Portfolio Management, Portfolios, Create/Edit Portfolios, Component Weighting).

Portfolio Definition | Scorecards | KPIs | Dimension Attributes | **Component Weighting** | Dimension Member Selection

SetID: SHARE Portfolio ID: PM\_RISK Risk-Relative Weighting Matrix

Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1990 Status: Active Calculate Score

Component Details Customize

Component 1-5 Score

Description	Confidence in Exec Sponsorship	Pre-req Dependent Projects	Dependency on Commercial Dev	Customization / Config Effort	Corporate Vision
Confidence in Exec Sponsorship		Equal	Less Import	Less Importa	More Import
Pre-req Dependent Projects	Equal		More Import	More Importa	More Import
Dependency on Commercial Dev	More Important	Less Important		Less Importa	Equal
Customization / Config Effort	More Important	Less Important	More Important		More Import
Corporate Vision	Less Important	Less Important	Equal	Less Important	

Score: 108.00 100.00

Portfolio Definition - Component Weighting page

The columns and rows on this page display the components of the tree (the tree nodes) upon which the portfolio is based, as defined on the Portfolio Definition page. Each component is listed in both a row and a column within the matrix so that each component can be ranked against every other component.

To rank the components and determine their scores:

1. For each pair of components that you rank, select a value in the drop-down list box at the intersecting cell in the grid.

Rank the component in the row against the component in the column; in the example shown, the component *Pre-req Dependent Projects* is ranked more important than the component *Dependency on Commercial Dev*. You are not required to rank every pair of components. In cases for which you are using relative ranks, the system automatically fills in the appropriate opposite rank, as defined on the Component Rank ID Mapping page. You must establish the valid rankings and their numerical equivalents using the Component Ranking Definition page prior to using them on this page.

See *PeopleSoft Enterprise Scorecard 9.1 PeopleBook*, "Setting Up Portfolios," Establishing Ranking Definitions.

This page may have multiple tabs to accommodate every component. Access each tab to rank that set of components, or view them all in a scrollable grid by clicking the View All button.

2. Click the Calculate Score button to display the raw score and weight (weighted score) on the Score tab.

The score and weight for each component appear in the last two columns of the grid.

The score that appears is the sum of the numeric equivalents for values that are selected for each component pair. The weight is the percentage of the total score that is calculated for the score in any given row. Therefore, the total weight will always be slightly less than or equal to 100.

## Scoring Project Requests

Access the Project Request - Scoring page (Project Portfolio Management, Project Requests, Scoring).

Project Request	Scoring	Attachments	Costs	Benefits	Dependency	Milestones	Summary Costs/Benefits	Status History
Business Unit:	CORP1	Corporation 1	Base Currency:		US Dollar			
Project Request:	HT10010	Accounts Payable (ERP)						
<b>Primary Risk</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>								
*Score Group:		PM_RISK	Risk-Relative Weighting Matrix		View Weighting		Edit Risk Elements	
<b>Risk Category</b> <span style="float:right">Customize   Find   First 1-5 of 5   Last</span>								
Description	Risk Level	Gross Score	Adj. (+/- %)	Avg. Prob. of Milestones (%)	Net Adj.	Net Score	Comments	
<a href="#">Confidence in Exec Sponsorship</a>	01 - Low	0.16	35.00	66.67	0.04	0.20		
<a href="#">Pre-req Dependent Projects</a>	01 - Low	0.32	-20.00	86.67	-0.06	0.26		
<a href="#">Dependency on Commercial Dev</a>	05 - Medium	0.79	40.00	86.67	0.27	1.06		
<a href="#">Customization / Config Effort</a>	01 - Low	0.29				0.29		
<a href="#">Corporate Vision</a>	05 - Medium	0.37	20.00	80.00	0.06	0.43		
<b>Gross Score:</b>				1.93	<b>Net Score:</b>		2.24	
<b>Score Groups</b> <span style="float:right">Find   View All   First 1 of 1   Last</span>								
*Score Group:		PM_KBO_SUPPORT	KBO-Relative Weighting Matrix		View Weighting			
Score Type:		Primary KBO						
<b>Category</b> <span style="float:right">Customize   Find   First 1-7 of 7   Last</span>								
Description	Support Level	Score						
Expand Globally	05 - Medium	0.73						
Reduce Costs	01 - Low	0.14						
Increase Operational Efficiency	05 - Medium	0.22						
Increase Revenue or Offerings	05 - Medium	1.00						
Improve Customer Experience	10 - High	1.42						
Investment in the Company	10 - High	1.82						
Corporate Vision	05 - Medium	0.71						
<b>Overall Score:</b>		6.04						
<input type="button" value="Calculate Score"/>								

Project Request - Scoring page

### Primary Risk

To associate the project request with the portfolio that specifies the primary risk components and generate the scores for primary risk, complete these fields:

#### Score Group

Select the portfolio that defines the primary risk category components. These components are the rows that appear in the Risk Category grid.

#### View Weighting

Click to view the Component Weighting page of the portfolio. The weight matrix is read-only.

<b>Edit Risk Elements</b>	Click to access the Risk Elements page, where you can associate risk elements and risk milestones with each risk category. The percentage probability of risk milestones is used to calculate the average probability of the adjustment percentage.
<b>Description</b>	Lists the risk category. Click to access the Risk Elements page, where you can define the risk elements for each risk category.
<b>Risk Level</b>	Select this project request's relative level of risk for each risk category. You define risk levels by using the Component Ranking Definition page.
<b>Gross Score</b>	Displays the computed score for each risk category, and a total gross score for all risk categories. This is calculated as $Gross\ Score = \text{Sum}(Risk\ Category\ Score)$ .
<b>Adj.(+/-%) (adjustment percentage)</b>	Enter a percentage by which to increase or decrease the risk, based on your knowledge of circumstances that affect the risk. Positive values represent an increase in risk; negative values represent a decrease.
<b>Avg. Prob. of Milestones % (average probability of milestones)</b>	Displays the average of the probability field for all risk milestones that are associated with this risk category. This is calculated as $Avg.\ Prob.\ of\ Milestones\ \% = \text{Sum}(\% \text{ Probability for each Risk Milestone attributed to a Risk Category}) \div (\text{Number of Risk Milestones attributed to the Risk Category})$
<b>Net Adj (net adjustment)</b>	Displays the net adjustment.
<b>Net Score</b>	Displays the risk score that reflects all adjustments. This is calculated as the gross score plus any net adjustments.
<b>Comments</b>	Click to review any comments.

### Score Groups

This group box generates the score for KBO support. You can insert additional rows to score additional score groups; however, only the primary KBO score group appears in the portfolio analysis pages.

<b>Score Group</b>	Select the portfolio that defines the components of the score group. These components are the rows that appear in the Category grid. The components in the specified portfolio appear in the grid.
--------------------	--

<b>Score Type</b>	<p>Select the score type for which this portfolio is used. Options are:</p> <p><i>Primary KBO:</i> (primary key business objective). Select to indicate that this is used for the key business objective support score.</p> <p>This field is not required. However, a score for portfolios without a selected score type is not used in portfolio analysis.</p> <hr/> <p><b>Note.</b> You may have as many non-typed portfolios as you like, but only one primary KBO or primary risk type.</p> <hr/>
<b>View Weighting</b>	Click to view the Component Weighting page of the portfolio. The weight matrix is read-only.
<b>Support Level</b>	<p>Select this project request's relative level of support for each category.</p> <p>You define support levels by using the Component Ranking Definition page.</p>

### **Generating Scores**

**Calculate Score** Click to calculate scores that show the level of risk and level of support for KBOs.

### **See Also**

*PeopleSoft Enterprise Scorecard 9.1 PeopleBook*, "Setting Up Portfolios," Establishing Ranking Definitions

## **Associating Risk Elements with Risk Categories**

Access the Risk Elements page (click Edit Risk Elements on the Project Requests - Scoring page).

### Risk Elements

**Business Unit:** CORP1 Corporation 1      **Project:** HT10010 Accounts Payable (ERP)  
**Score Group:** PM\_RISK Risk-Relative Weighting Matrix

[Create New Risk Element](#)    [Create New Milestone](#)

---

**Risk Elements for Risk Categories** Find First 1-5 of 5 Last

**Risk Category:** Confidence in Exec Sponsorship

**Risk Elements and Milestones** Customize | Find | First 1-3 of 3 Last

[Risk Elements](#)    [Milestone Info](#)

*Risk Element	Description	Risk Milestone	Description	Status	Prob. (%)			
FUNDING	Loss of grant or funding	PCH_ERP	Purchase ERP software	In Progress	60.00			
REORG	Organization restructure	HIRE_DEV_02	Hire developer for IT Help Desk project	Not Started	80.00			
REORG	Organization restructure	IT_REORG	IT Department restructure	Not Started	60.00			

---

**Risk Category:** Pre-req Dependent Projects

**Risk Elements and Milestones** Customize | Find | First 1-3 of 3 Last

[Risk Elements](#)    [Milestone Info](#)

*Risk Element	Description	Risk Milestone	Description	Status	Prob. (%)			
RQMT	Business requirements and functionality change							
RSRC	Loss of critical resources							
SFTW	Critical software unavailable	PCH_ERP	Purchase ERP software	In Progress	60.00			

Risk Elements page (1 of 2)

Risk Category: Dependency on Commercial Dev						
Risk Elements and Milestones						
*Risk Element	Description	Risk Milestone	Description	Status	Prob. (%)	
PROJ_ONTIME	Project delay	AP_ARCH	Select technology and software for AP project	Not Started	80.00	
PROJ_ONTIME	Project delay	AP_SYS_TEST	Complete AP project system test	Not Started	90.00	
PROJ_ONTIME	Project delay	PRC_CHG	Finalize new project development process	In Progress	90.00	

Risk Category: Customization / Config Effort						
Risk Elements and Milestones						
*Risk Element	Description	Risk Milestone	Description	Status	Prob. (%)	

Risk Category: Corporate Vision						
Risk Elements and Milestones						
*Risk Element	Description	Risk Milestone	Description	Status	Prob. (%)	
TECH	Risk on chosen technology	AP_ARCH	Select technology and software for AP project	Not Started	80.00	

### Risk Elements page (2 of 2)

This page lists all of the risk categories in the primary risk group that are associated with a project request. For each risk category, you can assign one or more risk elements, and optionally assign a risk milestone.

### Actions

**Create New Risk Element** Click to access the Risk Element page, where you can define a new risk element.

**Create New Milestone** Click to access the Milestone page, where you can define a new milestone.

### Risk Elements and Milestones

Complete the following fields to assign risk elements and risk milestones to a risk category.

**Risk Element** Select the risk element to associate with the risk category. Risk elements represent the specific risks that your organization tracks for a project request.

<b>Risk Milestone</b>	Select a milestone to assign to the risk element.  You are not required to assign a risk milestone to each risk element. However, to determine the average probability, every risk element is considered, whether or not a milestone is assigned. If a risk element does not have a milestone, then the system uses a value of 100 percent when computing the average probability.
<b>Status</b>	Displays the current status for the milestone.
<b>Prob. (%) (probability percentage)</b>	Displays the percentage probability that this will occur on time.
	Click to access the Risk Element Comment page, where you can enter or review comments for the risk element.

---

## Analyzing the Impact of Project Requests

This section provides an overview of the Project Request Analysis by Department component (PPK\_XREF\_INQ) and discusses how to:

- Define analysis options.
- Analyze the department-level impact.
- Analyze cost details and budget variances.

## Understanding the Project Request Analysis by Department Component

For you to make intelligent decisions about whether projects should be initiated, you need to be able to:

- Determine how the costs and benefits of requested projects are spread over time.
- Compare project request costs for a given period with budgets for that period.
- View the project request's return on investment.

The Project Request Analysis by Department component (PPK\_XREF\_INQ) enables you to analyze this information. It includes the following pages:

- The Impact Analyzer page.  
Shows cost and budget details over time by department.  
Shows net present value (NPV) and return on investment (ROI) by department.
- The Variance Analyzer page.  
Shows the cost details for project requests that affect a department.  
Compares summarized period costs against budget constraints and shows the variance.

- The Analyzer Options page.

Establishes options that control which department is analyzed, whether to view amounts by fiscal year or accounting period, and which project request IDs to review, based on their status.

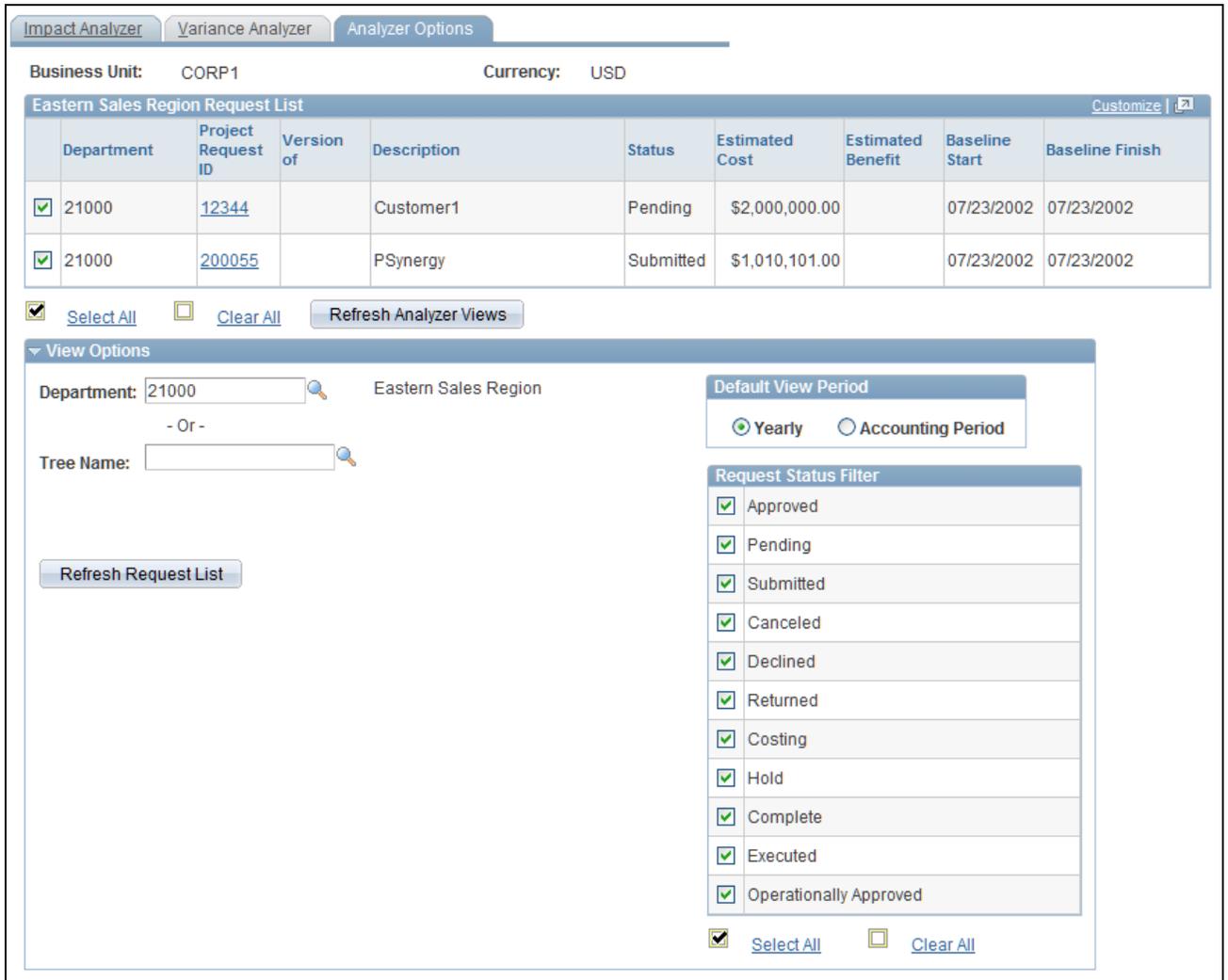
The system saves the last analyzer option settings that were used and uses those settings by default the next time you access the analyzer pages. This enables you to view the pages without having to establish the options each time. However, if you access these pages from the Project Request page, the system uses the business unit and department of the current project request and shows every project request for that department, regardless of status.

## Pages Used to Analyze the Impact of Project Requests

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Analyzer Options	PPK_XRF_PRLIST	Project Portfolio Management, Analysis, Project Req Analysis by Dept, Analyzer Options	Specify which data to use for impact analysis and variance analysis.
Impact Analyzer	PPK_XRF_FINVW	Project Portfolio Management, Analysis, Project Req Analysis by Dept, Impact Analyzer	View project request amounts (costs, budget, NPV, ROI) over time for a department.
Variance Analyzer	PPK_XRF_PROJVW	Project Portfolio Management, Analysis, Project Req Analysis by Dept, Variance Analyzer	View the variance between budget and actual costs for project requests and project request cost details.

## Defining Analysis Options

Access the Analyzer Options page (Project Portfolio Management, Analysis, Project Req Analysis by Dept, Analyzer Options).



Analyzer Options page

**View Options**

Expand to establish which information appears on the analyzer pages. The options available are:

- Department or Tree Name** Specify the department for which to review project requests.  
You can select a department tree and navigate through the levels of the tree to specify a department, or enter the department ID directly. If you use the department tree, you can optionally select a node on the tree. This enables you to view all departments at or below that tree node.
- Refresh Request List** Click to update the list of project requests for the selected departments in the Request List grid.
- Default View Period** Specify the default time frame to use on the analyzer pages. Options are:  
Yearly: Select to view subtotals by fiscal years.  
Accounting Period: Select to view subtotals by accounting periods.

**Request Status Filter** Specify which status of project requests to review.  
Select one or more status values. For example, if you select pending, you will view only those project requests that are in *Pending* status.

**Select All and Clear All** Click to either select all elements or clear all elements in the associated list.

### **<Department> Request List**

This grid is populated with the project requests and versions, if applicable, for the departments and statuses that you specify in the View Options group box. This same data will appear in the Project Request Selection grids on the analyzer pages. Select the check box to the left of the department ID for each project request or version that you want to use in computations on the analyzer pages, or use the Select All and Clear All options.

**Project ID** Click a description to transfer to the Project Request page and review this project request.

**Version of** Click a description to transfer to the Project Request page and review this project request version.

**Refresh Analyzer Views** Click to update the data on the analyzer pages with the selected options and project requests. The system also updates the default views for the analyzer pages to the current selections when you click this button.

If you don't click this option, the next time that you access this page, the system reverts to the options that were last saved.

## **Analyzing the Department-Level Impact**

Access the Impact Analyzer page (Project Portfolio Management, Analysis, Project Req Analysis by Dept, Impact Analyzer).

Impact Analyzer | [Variance Analyzer](#) | [Analyzer Options](#)

Business Unit: CORP1      Currency: USD

▼ Project Request Selection

Eastern Sales Region Request List [Customize](#) | [?](#)

	Department	Project Request ID	Description	Status	Estimated Cost	Estimated Benefit	Baseline Start	Baseline Finish
<input checked="" type="checkbox"/>	21000	<a href="#">12344</a>	Customer1	Pending	\$2,000,000.00		07/23/2002	07/23/2002
<input checked="" type="checkbox"/>	21000	<a href="#">200055</a>	PSynergy	Submitted	\$1,010,101.00		07/23/2002	07/23/2002

[Select All](#)    [Clear All](#)   [Refresh Analyzer Views](#)

[◀](#) [▶](#) View By: [Period](#) ▼

Eastern Sales Region Impact Summary

	2002-4	2002-5	2002-6	2002-7	2002-8	2002-9	Total
Total Benefit							
Total Cost				\$1,065,656.56	\$55,555.56	\$55,555.56	\$1,176,767.67
Net Cost				-\$1,065,656.56	-\$55,555.56	-\$55,555.56	-\$1,176,767.67
Net Present Value							-\$1,170,695.22
Return on Investment							-100%

▼ Estimated Project Request Benefits

	2002-4	2002-5	2002-6	2002-7	2002-8	2002-9	Total

▼ Estimated Project Request Costs

	2002-4	2002-5	2002-6	2002-7	2002-8	2002-9	Total
000000001				\$1,010,101.00			\$1,010,101.00
000000006				\$55,555.56	\$55,555.56	\$55,555.56	\$166,666.67

[Return to Search](#)   [Notify](#)

[Impact Analyzer](#) | [Variance Analyzer](#) | [Analyzer Options](#)

Impact Analyzer page

**Project Request Selection**

Expand this section to view the list of project requests and project request versions that match the criteria that are specified on the Analyzer Options page.

Select one or more project requests to include in the analysis totals. Any project requests that you selected in the Analyzer Options page are preselected.

**Refresh Analyzer Views** Click to update the associated totals when you modify the project request selection.

**Select All and Clear All** Click to either select all elements or clear all elements in the associated list.

## View Options

- View By** Specify the time frame to view. Options are:
- Year:* Select to view subtotals by fiscal years.
  - Period:* Select to view subtotals by accounting periods.
-  Click to scroll the page view to an earlier time frame.
-  Click to scroll the page view to a later time frame.

## <Department> Impact Summary

This section shows how the department is affected by the selected project requests over time. It includes amounts for these fields:

- Total Benefit.
- Total Cost.
- Net Cost.

Calculated as total benefits – total costs.

- Net Present Value.

The calculation that is used for this field is:

*((Present Value of Benefits for the displayed time period) – (Present Value of Costs for the displayed time period))*

The system uses the active discount rate that is specified on the Discount Rate page within the General Preferences component to calculate the present values.

- Return on Investment.

The calculation that is used for this field is:

*((Present Value of Benefits) – (Present Value of Costs) ÷ (Present Value of Costs)) ÷ 100*

## Estimated Project Request Benefits

Expand this section to view a summary of the estimated benefits over time, by account, for the selected project requests.

## Estimated Project Request Costs

Expand this section to view a summary of the estimated costs over time, by account, for the selected project requests.

## Analyzing Cost Details and Budget Variances

Access the Variance Analyzer page (Project Portfolio Management, Analysis, Project Req Analysis by Dept, Variance Analyzer).

The screenshot displays the 'Variance Analyzer' interface. At the top, it shows 'Business Unit: CORP1' and 'Currency: USD'. Below this is a 'Project Request Selection' section with a table titled 'Eastern Sales Region Request List'. The table has columns for Department, Project Request ID, Description, Status, Estimated Cost, Estimated Benefit, Baseline Start, and Baseline Finish. Two rows are visible: one for 'Customer1' (Pending, \$2,000,000.00) and one for 'PSynergy' (Submitted, \$1,010,101.00). Below the table are buttons for 'Select All', 'Clear All', and 'Refresh Analyzer Views'. A 'View By: Period' dropdown is also present.

Below the selection section is a 'Variance Summary' table for 'Eastern Sales Region'. It shows data for periods 2002-4 through 2002-9, plus a 'Total' column. The rows include 'Total Cost', 'Budget Constraint', 'Variance', and 'Total Benefit'. The 'Variance' row shows a negative value of \$-1,176,767.67.

At the bottom is a 'Project Request Cost Detail' table with columns for Department, Project Request ID, Version of, Status, and cost breakdown by period (2002-4 to 2002-9) and a 'Total' column. It shows two rows corresponding to the project requests above.

Navigation buttons at the bottom include 'Return to Search' and 'Notify'. The footer of the interface shows 'Impact Analyzer | Variance Analyzer | Analyzer Options'.

Variance Analyzer page

### Project Request Selection

Expand this section to view the list of project requests and project request versions that match the criteria that are specified on the Analyzer Options page.

Select one or more to include in the analysis totals. Any project requests that you selected in the Analyzer Options page will be selected on this page by default.

**Refresh Analyzer Views** Click to update the associated totals when you modify the project request selection.

**Select All and Clear All** Click to either select all elements or clear all elements in the associated list.

### <Department> Variance Summary

Expand this section to view a summary of the total cost, budget constraint, and variance (budget constraint – cost), and the total benefit for a department, per period, for the selected project requests.

Budget constraint is equivalent to the project-related budgeted costs, as defined by the department budget source for that time period.

See [Chapter 3, "Setting Up Project Portfolio Management," Defining Budget Record Data, page 30.](#)

### ***Project Request Cost Detail***

Expand this section to view itemized costs, over time, for the selected project requests.



## Chapter 5

# Establishing and Analyzing Project Portfolios

This chapter provides an overview of portfolio analysis and discusses how to:

- Establish project portfolios.
- Establish selection rules.
- Establishing project portfolio trees.
- Analyze project portfolios.

### **See Also**

[Chapter 3, "Setting Up Project Portfolio Management," Defining Measures and Dimensions, page 34](#)

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## Understanding Portfolio Analysis

Several elements within the Project Portfolio Management application play a part in portfolio analysis:

- Project portfolios.
- A project portfolio tree.
- Measures and dimensions.
- The Portfolio Analysis component (BC\_PORTFLIO\_VIEW).

### **Project Portfolios**

For the purposes of the Project Portfolio Management application, a portfolio defines a group of related projects and project requests, and this documentation uses the term project portfolios to refer to these portfolios. Portfolios are created by using the Portfolio Definition component (BC\_PORTFOLIO\_DFN).

The steps to set up a project portfolio are:

1. Create the portfolios, using the Portfolio Definition page.

2. Using the Portfolio Definition - Dimension Member Selection page, specify which projects and project requests to include in the portfolio, using one of these methods:
  - Specify each project or project request individually, by selecting its ID.
  - Define a rule that retrieves the projects.

Use the Dim Member Select component (BC\_KPI\_FILTER) pages to define the rule.

3. Create your project portfolio tree.

As you define each node, select the portfolio ID to use for that node.

### **Project Portfolio Tree**

A project portfolio tree depicts the hierarchical relationship of project portfolios within your organization. For example, you can establish a tree where the root node represents all corporate projects, the next level represents departments or regions, and the lowest level is made up of project portfolios categorized by functional grouping, such as sales projects, finance projects, and so on. You must establish project portfolios before you can define a project portfolio tree.

The PORTFOLIO\_PPK tree structure is required for any project portfolio trees that you create. The tree must be a node-oriented (winter) tree. Each tree node within a project portfolio tree must be a defined portfolio. The nodes at the lowest level of the tree represent portfolios of projects and project requests, those at higher levels represent the organizational categories within which you group your project portfolios, and the points at which the project data is summarized. The illustration below shows an example of the project portfolio tree, PORTFOLIO\_DEMO, that is delivered with the demo database.



PORTFOLIO\_DEMO tree

---

**Note.** By definition, every portfolio requires a dimension member (a project request ID or project ID in the case of project portfolios). Therefore, when you define a portfolio that will be used for a summary node, it must have at least one project ID or project request ID associated with it. For portfolio analysis the system considers *only* the project requests and projects that are associated with nodes at the *lowest* level of the tree (the terminal nodes). The system *excludes* any projects and project requests associated with summary level nodes; they don't appear on the Portfolio Analysis page, nor is their data used to compute aggregated results.

---

## ***Measures and Dimensions***

Measures and dimensions are the project and project request data that is available to be analyzed by using the Portfolio Analysis page. Measures are data from numeric-based fields, such as estimated costs and return on investment, while dimensions are data from character-based fields, such as project owner and requesting department. Measures and dimensions are established by using the Define Measures/Dimensions page. These measures and dimensions comprise the list of values that are available to use as data for an analysis chart. Measures and dimensions are established at the system level, and once defined, are available for all users when using the Portfolio Analysis component.

## ***The Portfolio Analysis Component***

The Portfolio Analysis component displays a chart and lists the values of the measure and dimension data for the projects and project requests that are associated with the terminal nodes of a project portfolio tree. The component includes a section for configuring the chart, an interactive view of the project portfolio tree, the generated chart, and a grid that contains two tabs—one that displays the values for the charted project portfolios, and one that displays the values for up to four additional measures. These additional measures can include key project metrics that you wish to analyze but choose not to include in the chart; they are established per user by using the Additional Portfolio Measures page.

Using this page, you navigate through the project portfolio tree to view the data associated with the selected node. If the selected node has nodes that are subordinate to it, the data that appears is aggregated from the immediate subordinates of that node using the summarization rules specified for that dimension or measure. If the selected node has no subordinates, then the data that is viewed will be for each of the projects and project requests within that portfolio.

Each user can save their own configured analysis "views", and specify which view is the default view. To examine a particular set of portfolios or project requests you can also selectively choose which to chart.

The following chart types are provided:

- Line.
- Bar (two dimensional or three dimensional).
- Stacked bar (two dimensional or three dimensional).
- Pie (two dimensional or three dimensional).
- Bubble.

Each chart type has different data and label requirements and options.

---

## **Establishing Project Portfolios**

To establish project portfolios, use the Portfolio Definition component (BC\_PORTFOLIO\_DFN).

This section discusses how to:

- Define project portfolios.
- Specify the project requests and projects to include.

**Note.** The Portfolio Definition component contains several pages that are not used for project-based portfolios or the Portfolio Analysis component. Information about those pages, and creating scorecard and KPI-based portfolios, is available in the *PeopleSoft Enterprise Scorecard 9.1 PeopleBook*.

See *PeopleSoft Enterprise Scorecard 9.1 PeopleBook*, "Setting Up Portfolios."

## Pages Used to Establish Project Portfolios

Page Name	Definition Name	Navigation	Usage
Portfolio Definition	BC_PORTFOLIO_DFN	Project Portfolio Management, Portfolios, Create/Edit Portfolio, Portfolio Definition	Create a portfolio definition.
Portfolio Definition - Dimension Member Selection	BC_PORTFLIO_OBJ	Project Portfolio Management, Portfolios, Create/Edit Portfolio, Dimension Member Selection	Specify which projects to include in the portfolio.

## Defining Project Portfolios

Access the Portfolio Definition page (Project Portfolio Management, Portfolios, Create/Edit Portfolio, Portfolio Definition).

Portfolio Definition page

### Description

Enter a description for the project portfolio.

**Tree Name**

Select a tree. Portfolios have multiple uses in the various Scorecard applications. For the purposes of defining project portfolios to use with the Portfolio Analysis component, this tree has no function, and you can use any tree. In fact, you may prefer to create a tree that has only a single node to assign to all project portfolios to meet the requirement. However, if you intend to use this portfolio as a scorecard portfolio, this tree is used to determine the strategy components in the portfolio.

**Specifying the Project Requests to Include**

Access the Portfolio Definition - Dimension Member Selection page (Project Portfolio Management, Portfolios, Create/Edit Portfolio, Dimension Member Selection).

Portfolio Definition | Scorecards | KPIs | Dimension Attributes | Component Weighting | **Dimension Member Selection**

SetID: SHARE Portfolio ID: PM\_IT\_INVEST Corporate IT Investments

Details Find First 1 of 1 Last

Effective Date: 01/01/1990 Status: Active

Member List Type: Defined by Dimension Member

Selection Rule:

Dimensions Customize | Find | View All | 1-5 of 5 | First Last

*Member ID	Description	Baseline Finish	Baseline Start		
131300	Training - EMEA	2002-12-20	2002-12-01	+	-
195000	Single Sign-on	2003-05-10	2003-02-20	+	-
305000	Wireless Access	2003-01-23	2002-10-23	+	-
400021	Finance Sys Consol	2003-05-01	2002-11-01	+	-
550000	Corp Marketing Sys	2003-04-20	2002-11-10	+	-

Portfolio Definition - Dimension Member Selection page

**Member List Type**

Specify how to define the project request member IDs. Options are:

*Defined by Dimension Member:* Select to specify each project request by its ID, then add rows in the Dimension Members grid and select the project requests to include.

*Defined by Selection Rule:* Select to use a rule that defines which project requests to include. Specify the rule to use in the Selection Rule field.

**Selection Rule**

Select the rule that defines which dimension members to select. This field is unavailable for entry unless the Member List Type field is set to *Defined by Selection Rule*.

**View Selection Rule**

Click to access the Dim Member Select page and review the rule. This link is only available when the Member List Type field is set to *Defined by Selection Rule*.

**Create Selection Rule** Click to access the Dim Member Select page and add a new rule. This link is only available when the Member List Type field is set to *Defined by Selection Rule*.

## Establishing Selection Rules

This section discusses how to:

- Define dimension member selection rules.
- Define an advanced rule.
- Preview project request IDs.

## Pages Used to Establish Selection Rules

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Dim Member Select	BC_KPI_FILTER	<ul style="list-style-type: none"> <li>• Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Select</li> <li>• Select the Create Selection Rule link or the View Selection Rule link on the Portfolio Definition - Dimension Member Selection page.</li> </ul>	Define a rule that specifies which project request IDs to include in a portfolio.
Dim Member Select - Advanced Selection	BC_KPI_FILTER_ADV	Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Advanced Selection	Extend the selection rule by specifying criteria for fields that are outside of the dimension.
Dim Member Select - Dim Member Preview	BC_KPI_FILTER_VIEW	Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Preview	Preview the list of dimension members that are retrieved by this selection rule.

## Defining Dimension Member Selection Rules

Access the Dim Member Select page (Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Select).

Dim Member Select    Advanced Selection    Dim Member Preview

SetID: SHARE      Dim Member Selection Rule: TEST2

Dim Member Select    Find | View All    First 1 of 1    Last

\*Effective Date: 01/01/1990    \*Status: Active

\*Description: Another PPM Test

Enter the criteria for the Dimension Member Selection Rule. Use the Advanced Selection tab to include criteria against fields outside of the dimension.

Warehouse: Operational Warehouse

Name

\*Dimension: PROJECT\_REQUEST

[Clear Selection](#)

Dimension Selection    Find | View All    First 1 of 1    Last

Dimension Record: PROJ\_N\_REQ\_VW    Projects and Proj Requests VW

Dimension Fields    Customize | Find |    First 1-2 of 2    Last

Open	*Field Name	*Comparison Operator	*Value	Close	And/Or
(	PROJECT_ID	Equal To	131300	)	OR
(	PROJECT_ID	Equal To	200055	)	

Dim Member Select page

**Warehouse Name**      Select the warehouse to use as the data source for this data element. Options are:  
*Multi-Dimensional Warehouse.*  
*Operational Warehouse.*

**Dimension**              Select the dimension from which the rule retrieves members.

**Clear Selection**        Click this link to clear the current selection criteria.

### ***Dimension Selection***

Insert rows as needed to compose the criteria used for the rule.

**Open and Close**        Select the number of opening or closing parentheses needed for the selection criteria.

**Field Name**             Select the field to use for the filter criteria.

**Comparison Operator** Select the operator to use as selection criteria . Options are:

- Equal To*
- Greater Than.*
- Greater Than or Equal To.*
- Less Than.*
- Less Than or Equal To.*
- Equal To.*

*is Like:* Like the comparison value. Valid only for character type fields that have no associated lookup tables. The system programmatically appends a wildcard to the end of the lookup value that you enter.

*is Not Like:* Not like the comparison value. Valid only for character type fields that have no associated lookup tables. The system programmatically appends a wildcard to the end of the lookup value that you enter.

*Not Equal To.*

**Value** Enter or select the comparison value.

**And/Or** Select either *AND* or *OR* to relate one line to the next of the filter criteria.

## Defining an Advanced Rule

Access the Dim Member Select - Advanced Selection page (Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Advanced Selection).

Dim Member Select    Advanced Selection    Dim Member Preview

SetID: SHARE      Dim Member Selection Rule: TEST2

**Advanced Selection** Find | View All First 1 of 1 Last

Effective Date: 01/01/1990      Status: Active

Extend the Dimension Member Selection Rule beyond Dimension Fields. Select the Additional Data you need to further qualify your selection. You may choose from KPI data or any other data that can be associated with the Dimension of the rule.

[Clear Selection](#)

**Additional Selection** Find | View All First 1 of 1 Last

\*Record Type: KPI Data      \*Relationship to other criteria: [dropdown] + -

\*Additional Record: KP\_KPI\_CALC\_F00      KPI Calc Fact Table

**Additional Search Fields** Customize | Find | [grid icon] First 1 of 1 Last

Open	*Field Name	*Comparison Operator	*Value	Close	And/Or
[dropdown]	CURRENCY_CD	Equal To	EURO	[dropdown]	[dropdown] + -

Dim Member Select - Advanced Selection page

To extend the object selection rule to additional dimension fields, insert one or more Additional Selection sections and specify additional data and criteria to further qualify your selection. You may use KPI data or other data that can be associated with the dimension of this rule. For example, you could define an advanced rule to limit your projects to those that have a negative trend.

**Clear Selection** Click to clear the current selection criteria.

### ***Additional Selection***

**Record Type** Specify the type of record to use. Options are:  
*Associate with Dimension:* Select to use records from dimension data for this filter.  
*KPI Data:* Select to use KPI records for this filter.  
 Your selection controls which records appear in the selection list for the Additional Record field.

**Additional Record** Select to the record upon which to base your additional criteria.

**Relationship to other criteria** Indicate how this criteria is used with respect to the other criteria, either *And* or *Or*.

### ***Additional Search Fields***

Insert rows to specify the criteria. These fields are described in the page description for the Dim Member Select page.

See [Chapter 5, "Establishing and Analyzing Project Portfolios," Defining Dimension Member Selection Rules, page 90.](#)

## **Previewing Project Request IDs**

Access the Dim Member Select - Dim Member Preview page (Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Preview).

### ***Preview Parameters***

Enter the parameters for viewing the project and project request IDs this rule retrieves by completing the fields and clicking Show Results.

### ***Dimension Members***

This grid shows the project requests retrieved by the rule for the specified parameters.

---

## Establishing Project Portfolio Trees

This section discusses how to create project portfolio trees.

### Page Used to Establish Project Portfolio Trees

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tree Definition and Properties	PSTREEDEFN	<ul style="list-style-type: none"> <li>• Project Portfolio Management, Portfolios, Create/Edit Portfolio Tree</li> <li>• Tree Manager, Tree Manager</li> </ul> <p>Click Create New Tree.</p>	Use PeopleTools Tree Manager to create a project portfolio tree.

### Creating a Project Portfolio Tree

To create a project portfolio tree:

1. Using PeopleSoft Tree Manager, create a tree, using the PORTFOLIO\_PPK structure.

Set levels to *Strictly Enforced*.

2. Add nodes to the tree, selecting the portfolio ID for each node.

---

**Note.** You must create the portfolio IDs prior to inserting them as nodes of the tree.

---

#### **See Also**

[Chapter 5, "Establishing and Analyzing Project Portfolios," Establishing Project Portfolios, page 87](#)

*Enterprise PeopleTools PeopleBook: PeopleSoft Tree Manager*

---

## Analyzing Project Portfolios

This section discusses how to:

- Configure the analysis and review results.
- Specify the analysis parameters.
- View costs and benefits by fiscal year or period.

**See Also**

Chapter 3, "Setting Up Project Portfolio Management," Establishing Portfolio Analysis Preferences, page 36

**Pages Used to Analyze Project Portfolios**

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Portfolio Analysis	BC_PORTFLIO_VIEW	<ul style="list-style-type: none"> <li>Project Portfolio Management, Analysis, Portfolio Analysis</li> <li>Click OK on the Portfolio Analysis Search page.</li> </ul>	Analyze important metrics for multiple project requests.
Portfolio Analysis Search	BC_PORTVIEW_FILTER	Click Change View Parameters on the Portfolio Analysis page.	Specify analysis parameters.
Project Period View	BC_PROJECT_VIEW	Click the View Projects by Periods link on the Portfolio Analysis page.	Review estimated costs and benefits per project request, by accounting period or fiscal year.

**Configuring the Analysis and Reviewing Results**

Access the Portfolio Analysis page (Project Portfolio Management, Analysis, Portfolio Analysis).

---

**Note.** If the portfolio analysis preference settings have not been established by using the User Portfolio Preferences component, the Portfolio Analysis Search page automatically appears and must be completed before you access the Portfolio Analysis page.

---

### Portfolio Analysis

**Chart Parameters**

Analysis: COST\_BNFT\_ANALY  Default Analysis Save Analysis

\*Chart Title: Cost Benefit Analysis \*X Axis: PROJECT\_ID \*Y Axis: ESTCOST

\*Chart Type: Stacked Bar - 2d \*X Title: Projects \*Y Title: Cost

Additional Line Plot

Y1 Data: ESTBEN  
Y2 Data:   
Y3 Data:   
Delete Refresh

\*Portfolio Tree: PORTFOLIO\_DEMO Business Unit: Corporation 1 Scenario: Project Portfolio Scenario

Year: 2002 Period: 4 Base Currency: USD

- [Company Overview](#)
- [Facilities Investments](#)
- [Marketing](#)
- [Corporate IT Investments](#)

[Change User Preferences](#) [Change View Parameters](#) [View Projects by Period](#)

**Portfolio KPI** Customize Find View All First 1-6 of 6 Last

Measures in Chart Additional Measures

Demo Portfolio Tree	Description	Project	Estimated Cost	% of Target	Estimated Benefit	% of Target
<a href="#">PM_MKTG</a>	Marketing		\$986,197.62	9.86	\$1,193,474.12	19.89 ▼
<input type="checkbox"/> <a href="#">-HT3456</a>	Telemarketing Campaign	HT3456	\$1,234,000.00	12.34	\$1,400,000.00	23.33 ▼ ⚙
<input type="checkbox"/> <a href="#">-M1001</a>	Customer Marketing	M1001	\$1,040,000.00	10.40	\$1,415,000.00	23.58 ▼ ⚙
<input type="checkbox"/> <a href="#">-M2001</a>	Incentive Sales System	M2001	\$974,400.00	9.74	\$1,210,000.00	20.17 ▼ ⚙
<input type="checkbox"/> <a href="#">-M2003</a>	Pipeline Report Creation	M2003	\$850,000.00	8.50	\$930,000.00	15.50 ▼ ⚙
<input type="checkbox"/> <a href="#">-M4004</a>	Internet Marketing Campaign	M4004	\$400,000.00	4.00	\$500,000.00	8.33 ▼ ⚙

Portfolio Analysis page

### Chart Parameters

Expand this group box to configure the portfolio analysis, or select a previously saved analysis configuration.

**Analysis** Select an analysis from the drop-down list to view a previously saved analysis.

**Default Analysis** Select to set the current analysis configuration as the analysis that appears whenever you access this page.

<b>Save Analysis</b>	<p>After defining the chart parameters, click to save the currently defined analysis. There are several ways to save an analysis configuration:</p> <ul style="list-style-type: none"> <li>• If the analysis has never been saved, enter the name in the adjacent edit box, then click Save Analysis. The Analysis field will automatically populate with the saved analysis name.</li> <li>• To save the analysis to a new name, enter the name in the adjacent edit box, then click Save Analysis.</li> <li>• To save changes to the currently loaded analysis, click Save Analysis without entering a name in the adjacent edit box.</li> </ul>
<b>Chart Title</b>	Enter the title for the chart.
<b>Chart Type</b>	<p>Select the type of chart to generate. Options are:</p> <p><i>Bar Chart - 2d:</i> Select to generate a two dimensional bar chart.</p> <p><i>Bar Chart - 3d:</i> Select to generate a three dimensional bar chart.</p> <p><i>Bubble Chart:</i> Select to generate a bubble chart.</p> <p><i>Line Chart:</i> Select to generate a line chart.</p> <p><i>Pie Chart - 2d:</i> Select to generate a two dimensional pie chart.</p> <p><i>Pie Chart - 3d:</i> Select to generate a three dimensional pie chart.</p> <p><i>Stacked Bar - 2d:</i> Select to generate a two dimensional stacked bar chart.</p> <p><i>Stacked Bar - 3d:</i> Select to generate a three dimensional stacked bar chart.</p>
<b>Additional Line Plot and Plot Data</b>	<p>Select this check box to include an overlay line on the chart, and select the measure to use for its data.</p> <p>This option is available only for bar charts and stacked bar charts.</p>
<b>X Axis</b>	Select the dimension or measure to use as the data for the X axis. For line and bubble charts, the available values are measures, for the remaining chart types, the available values are dimensions.
<b>X Title</b>	Enter the X axis title.
<b>Y Axis</b>	Select the measure to use as data for the Y axis.
<b>Y Title</b>	Enter the Y axis title.
<b>Y1 Data</b>	<p>Select the dimension or measure to use as the 2nd set of data to stack vertically on the bars.</p> <p>This option is available only for stacked bar charts.</p>
<b>Y2 Data</b>	<p>Select the dimension or measure to use as the 3rd set of data to stack vertically on the bars.</p> <p>This option is available only for stacked bar charts.</p>

<b>Y3 Data</b>	Select the dimension or measure to use the 4th set of data to stack vertically on the bars. This option is available only for stacked bar charts.
<b>Size</b>	Select the dimension or measure to use as the data for the bubble size. This option is available only for bubble charts.
<b>Color</b>	Specify which measure's assessment color to use as the bubble color. This option is available only for bubble charts.
<b>X Label 1</b>	Enter text for the label. This option is available only for bubble charts. It represents the trend, and appears as the left-most label on the X axis.
<b>X Label 2</b>	Enter text for the label. This option is available only for bubble charts. It represents the trend, and appears as the right-most label on the X axis.
<b>Y Label 1</b>	Enter text for the label. This option is available only for bubble charts. It is the label that appears lowest on the Y axis.
<b>Y Label 2</b>	Enter text for the label. This option is available only for bubble charts. It is the label that appears highest on the Y axis.
<b>Delete</b>	Click to delete the current saved analysis configuration.

### ***Portfolio KPI - Measures in Chart***

This grid lists the detail values of the measures or dimensions used as chart data, and contains the following columns:

<b>&lt;portfolio tree description&gt;</b>	Lists the description of the portfolio tree used in the analysis. Click the description to access the Portfolio Definition - Dimension Selection page if the row is a node ID from the project portfolio tree, or the Project Request definition page, if the row is a project request ID.
---	--

The first row in the grid is the description of the selected tree node. The remaining rows are either the directly subordinate nodes, or if the selected tree node is the lowest-level node, the project IDs associated with that node. The aggregated values for nodes are controlled by the rules established in the Define Measures/Dimensions page.

### **See Also**

[Chapter 3, "Setting Up Project Portfolio Management," Establishing Portfolio Analysis Preferences, page 36](#)

[Chapter 3, "Setting Up Project Portfolio Management," Defining Measures and Dimensions, page 34](#)

## Specifying the Analysis Parameters

Access the Portfolio Analysis Search page (click Change View Parameters on the Portfolio Analysis page).

Portfolio Analysis Search page

**Business Unit, Scenario ID, Fiscal Year, and Accounting Period** Select the organization and time period to view.

**Portfolio Tree** Select the project portfolio tree to use for the analysis. This determines which project requests are included.

**Change User Preferences** Click this link to access the User Portfolio Preferences component, where you can modify the settings that determine the default business unit, accounting period, scenario, and portfolio tree that are used by the Portfolio Analysis page.

**Add a New Portfolio Tree** Click this link to access Tree Manager, where you can add a new portfolio tree.

## Viewing Costs and Benefits by Fiscal Year or Period

Access the Project Period View page (click the View Projects by Periods link on the Portfolio Analysis page).

**View Project by Period**

**Project Period View**      Business Unit: Corporation 1      Scenario ID: Project Portfolio Scenario  
 Portfolio ID: Marketing      Base Currency: USD  
 View By: Year      Chart Type: None

Estimated Project Request Cost						
Project	Descr2	2002	2003	2004		
HT3456	Telemarketing Campaign	\$0.000000	\$0.000000	\$1234000.000000		
M1001	Customer Marketing	\$0.000000	\$0.000000	\$1040000.000000		
M2001	Incentive Sales System	\$0.000000	\$0.000000	\$974400.000000		
M2003	Pipeline Report Creation	\$0.000000	\$0.000000	\$850000.000000		
M4004	Internet Marketing Campaign	\$0.000000	\$0.000000	\$400000.000000		
	Total	\$0.000000	\$0.000000	\$4498400.000000		

Estimated Project Request Benefit						
Project	Description	2002	2003	2004		
HT3456	Telemarketing Campaign	\$0.000000	\$0.000000	\$1400000.000000		
M1001	Customer Marketing	\$0.000000	\$0.000000	\$955000.000000		
M2001	Incentive Sales System	\$0.000000	\$0.000000	\$290000.000000		
M2003	Pipeline Report Creation	\$0.000000	\$0.000000	\$730000.000000		
M4004	Internet Marketing Campaign	\$0.000000	\$0.000000	\$200000.000000		
	Total	\$0.000000	\$0.000000	\$3575000.000000		

Project Period View page

**View By**      Select the time period by which to view project costs and benefits.

**Chart Type**      Select *Line* to view a line chart of the costs and benefits over time.

**Estimated Project Request Cost and Estimated Project Request Benefit**      Expand or collapse these grids to view or hide the estimated costs and benefits for each project in the portfolio by accounting period or fiscal year.

## Chapter 6

# Using Project Portfolio Management Processes and Utilities

This chapter provides an overview of Project Portfolio Management processes and utilities and discusses how to

- Update milestone probabilities.
- Convert currency.

---

## Understanding Project Portfolio Management Processes and Utilities

The main processes and utilities that are used by Project Portfolio Management are:

- The Scorecard Assessment Application Engine process (BC\_ASSESS).
- The Update Milestone Probabilities Application Engine process (PPK\_UPD\_MST).
- The Convert Currency utility.

This section discusses:

- The Scorecard Assessment process.
- The Update Milestone Probabilities process.
- The Convert Currency utility.

### Scorecard Assessment Process

The Scorecard Assessment process calculates and assesses key performance indicators (KPIs). You must run this prior to analyzing project portfolios. The delivered jobstream for this process is BC\_ANALYZE. It updates the KP\_KPI\_CALC\_F00, KP\_KPI\_ASMT\_F00, and BC\_ASSESS\_F00 tables.

This process should be run at regular intervals. You must run it after you modify a project or after the Enterprise Performance Management Warehouse tables are updated in order to view current results for your project portfolios.

Details about running this process are in the *PeopleSoft Enterprise Scorecard 9.1 PeopleBook*.

See *PeopleSoft Enterprise Scorecard 9.1 PeopleBook*, "Processing KPIs and Scorecards."

## Update Milestone Probabilities Process

The Update Milestone Probabilities process updates the Probability of Occurrence field for milestones using the following business rules:

- If the current date is greater than the milestone's scheduled start date and the milestone status is *Not Started*, the system sets the Probability of Occurrence field to 50 percent.
- If the current date is greater than the milestone's due date and the milestone status is *Not Complete*, the system sets the Probability of Occurrence field to 0.
- If the milestone status is *Complete* and the Probability of Occurrence field is not 100 percent, the system sets the Probability of Occurrence field to 100 percent.

When the process updates a milestone's probability, it automatically updates the net scores for any project requests that are associated with that milestone.

This process should be run at regular intervals.

## Convert Currency Utility

If you've entered several project requests on different dates, and the effective currency conversion rate differs among those dates, use the convert currency utility to update amounts for your project requests using the current currency conversion rate. This ensures that you are viewing costs and benefits that are based on the same conversion rate. The system updates only amounts for project requests that are not yet approved; it does not update project requests with a status of canceled or declined.

For example, if you create two project requests on different dates that have the same cost amounts and both are entered in Canadian currency, and if the effective currency conversion rate differs on the dates that the project requests were created, then when you view them in the base currency, they will appear to have different costs because they used different exchange rates. Using the convert currency utility corrects this situation by synchronizing all monetary amounts for project requests.

---

## Updating Milestone Probabilities

This section discusses how to run the Update Milestone Probabilities process.

### Page Used to Update Milestone Probabilities

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Update Milestone Probabilities	PPK_RUN_MST_AE	Project Portfolio Management, Administration, Processing, Update Milestone Probabilities	Run the Update Milestone Probabilities Application Engine process.

## Running the Update Milestone Probabilities Process

Access the Update Milestone Probabilities page (Project Portfolio Management, Administration, Processing, Update Milestone Probabilities).

Click Run to run the process.

## Converting Currency

This section discusses how to run the convert currency utility.

### Page Used to Convert Currency

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Process Currency Conversions	PPK_PROCESS	Project Portfolio Management, Administration, Processing, Process Currency Conversions	Convert currency amounts. This synchronizes all monetary amounts for project requests.

## Running Currency Conversion

Access the Process Currency Conversions page (Project Portfolio Management, Administration, Processing, Process Currency Conversions).

Click Run Now.



## Chapter 7

# Integrating with PeopleSoft Enterprise Program Management

This chapter provides an overview of integration with Program Management and describes how to:

- Define integration options.
- Set up PeopleSoft Integration Broker.
- Activate relevant application messages.
- Set up portal node definitions.

---

## Understanding Integration with Program Management

Program Management resides in the PeopleSoft Enterprise Financials and Supply Chain Management database (FSCM) database. Project Portfolio Management uses application messaging to send and receive updated project request information from the PeopleSoft FSCM database. Project requests are published as XML messages. The main source records for project request data are:

- BC\_PROJ\_REQUEST
- BC\_COST\_EST

When integrated with Portfolio Management, Program Management:

- Creates detailed costing information for a project request.
- Submits the costed project request for approval in Project Portfolio Management.

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## Defining Integration Options

You enable integration by using the Integration page.

See [Chapter 3, "Setting Up Project Portfolio Management," Defining Integration Settings, page 21.](#)

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## Setting Up PeopleSoft Integration Broker

You must use PeopleSoft Integration Broker to set up message queues and message channels.

To set up and use the Integration Broker (IB) Gateway:

1. Review the *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration* chapters to learn how to set up the IB Gateway.
2. Point the IB Gateway to the EPM and FSCM databases.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration*

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## Activating Relevant Application Messages

To activate application messages, use Integration Broker to complete the following tasks:

1. Using the Queue Definitions page, access the PPK\_CHANNEL queue and set the Queue Status to *Run*.

Access the Queue Definition page by selecting PeopleTools, Integration Broker, Integration Setup, Queues.

2. Using the Service Operation - General page, access the PPK\_PROJECT\_DETAILS service operation, and select the Active check box.

Access the Service Operation - General page by selecting PeopleTools, Integration Broker, Integration Setup, Service Operations, enter PPK\_PROJECT\_DETAILS in the Service field on the Find Service Operation search page, then click Search.

3. Using the Routings Definition page, access the routing that is associated with the Service Operation PPK\_PROJECT\_DETAILS and select the Active check box to activate the routing.

Access the Routings Definition page by selecting PeopleTools, Integration Broker, Integration Setup, Routings, enter PPK\_PROJECT\_DETAILS in the Service field on the Routing Definitions search page, then click Search.

For more details about the pages associated with these tasks, review the PeopleSoft Enterprise PeopleTools Integration Broker PeopleBooks.

See *Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Integration Broker Administration*

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**Note.** You must activate the appropriate application messages in both databases.

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## Setting Up Node Definitions

Node definitions must be defined for the ERP node for integration to work. Instructions are provided in the PeopleSoft Integration Broker PeopleBook.

See *Enterprise PeopleTools PeopleBook: PeopleSoft Integration Broker Administration*, "Adding and Configuring Nodes," Defining Node Parameters.



## Chapter 8

# Key Performance Indicators (KPIs)

This chapter provides an overview of Project Portfolio Management KPIs, and discusses delivered KPI details.

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## Understanding Project Portfolio Management KPIs

PeopleSoft delivers predefined KPIs for use with PeopleSoft Portfolio Management. Predefined KPIs are the basis for analysis within Project Portfolio Management. It is important to understand the definition detail to understand what is being calculated in your scorecard results.

This section discusses:

- KPI terminology.
- Delivered elements.

## KPI Terminology

The predefined KPIs are built using tablemaps, datamaps, filters and constraints. These are the building blocks of the PeopleSoft Enterprise Performance Management. In addition to these key components, Project Portfolio Management uses the PeopleSoft Enterprise Scorecard tools to construct the analysis calculation, and the rules and relationships pertaining to the individual KPIs.

<b><i>Term</i></b>	<b><i>Definition</i></b>
KPI Definition	Defines a KPI to the system. You specify how to calculate it, the KPI dimension members, and their target rules.
What this KPI does	Narrative description of this KPI.

<b>Term</b>	<b>Definition</b>
Calculation Description	<ul style="list-style-type: none"> <li>• The analysis calculations that comprise the KPIs, which illustrate the record and fields being accessed. The tablemaps and datamaps access this information.</li> <li>• The type of aggregation that is occurring: This information is shown on the data element panel.</li> <li>• The criteria necessary to access a specific field: This information is shown on the filter</li> <li>• The fields that are being aggregated: This information is shown on the data element panel.</li> </ul>
Calculation Expression	The entry in the Calculation Expression field on the Calculations - Expression (KP_CALC_DEFN2) page.
Composite Pieces	KPIs used if this is a composite KPI; this is blank or n/a for all but composite KPIs.
Data Used in the KPI	KPI Name or KPI ID. Not used for composite KPIs, which are listed in Composite Pieces row.
Calculation Definition	Defines calculations on which a KPI is based.
KPI Calculation Rule	Assigns calculation IDs to a KPI.
TableMap	Defines the physical relationships between tables and is the foundation for DataMaps.
DataMap	Enables you to define what subset of data gets processed by or uses a specific business rule. For example, you might use a filter to specify or "filter" out only employees who have a review rating of 3 or higher.
Constraint	Is based on DataMaps. Constraints allow you to define business rules for processing and also enable you to reuse and group filters.
Data Element	Defines a subset of data and the rules by which to group it. Data elements are used as the basis for key performance indicators and as target values for KPI dimension members.
Model ID	Enables you to define the type of data you want to analyze and how you want to analyze it.

<b>Term</b>	<b>Definition</b>
Scenario	Points to a Model ID and defines the business rules, economic assumptions, and chunking selection for processing.
KPI Dimension Members	Individual items for which a KPI is assessed.
KPI Target Rule	Rules that determine how a KPI dimension member is assessed.
Dimension	An attribute, such as time, product, and location, used to categorize or identify a particular piece of data. In the Enterprise Performance Management product line, you can view product, customer and channel dimensions.
Perspective Type	A category for organizing CSFs and KPIs. Usually there are four: financial; customer; internal; and learning.
KPI Cause/Effect (KPIs affected by this KPI)	Which KPIs the current KPI impacts.
Critical Success Factor	The critical success factor to which this KPI is attached.
Strategy KPIs	Calculated values for assessing your critical success factors, strategic thrusts, and strategic initiatives. A KPI is associated with a strategy tree component or strategic initiative.
KPI Type	One of these: Manual, Calculated , Composite.

**See Also**

*PeopleSoft Enterprise Scorecard 9.1 PeopleBook*

**Delivered Elements**

As delivered, Project Portfolio Management uses the naming conventions described in the following table for the sample data that is delivered with the DEMO database.

**Scorecard ID for Project** PM\_PROJECTS  
**Portfolio Management**  
**Scorecard:**

**Strategy Tree:** PM\_STRATEGY\_01

**Scenario ID**

PPM\_SCENARIO

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## Delivered KPI Details

Details about the delivered KPIs are provided in the PPMKPIs.PDF file that is located on the PeopleBooks CD. This file provides information on each of the delivered predefined KPIs via summary and detail tables. Use these tables to better understand Project Portfolio Management KPI calculations. You can also use the information in these tables as a basis for altering the scorecard to update KPIs and target rules.

## Appendix A

# Delivered Workflows for Project Portfolio Management

This appendix discusses delivered workflows for Project Portfolio Management.

### **See Also**

Chapter 4, "Establishing Project Requests," Approval Workflow, page 43

*Enterprise PeopleTools PeopleBook: Workflow Technology*

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## Delivered Workflows for Project Request Approval

This section discusses the delivered Project Request Approval workflows. The workflows are listed alphabetically by workflow name.

### Approval Process for Funding Department Managers

This section discusses the Approval Process for Funding Department Managers workflow, which includes these events:

- Preapproved.
- Return to requester.

This workflow is active only if funding manager approval is required, which you establish at the installation level by using the Program Management page (INSTALLATION\_PGM) in the Installation Options component (INSTALLATION).

#### ***Preapproved Event***

<b>Event Description</b>	This event is triggered when a project request approver approves a project request and submits it for approval to the funding department managers.
<b>Action Description</b>	The system sends a worklist item to all funding department managers of the departments that are listed in the cost departments on the Summary Costs/Benefits page (BC_EST_COST_BENFT) and changes the project request status to <i>Operationally Approved</i> .

<b>Notification Method</b>	Worklist
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### **Workflow Objects**

<b>Event</b>	PRE_PROCESS (PRE APPROVED)
<b>Approval Rule Set</b>	PPK_FUNDMGT_APPROVAL
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_PRJ_FUNMGT_APPROVAL
<b>Role</b>	MANAGER, DIRECTOR_FUNDING, VICE_PRESIDENT

### **Return to Requester Event**

<b>Event Description</b>	This event is triggered when a Funding Department manager clicks the Returned button on the Funding Department Approval Page (PPK_FUND_APPROVAL).
<b>Action Description</b>	The system sends a worklist item to the person in the Approver field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Returned</i> .
<b>Notification Method</b>	Worklist

### **Workflow Objects**

<b>Event</b>	RETURN_REQ (Return to Requester)
<b>Approval Rule Set</b>	PPK_FUNDMGT_APPROVAL
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_PJ_FUNMGT_APPROVAL
<b>Role</b>	MANAGER, DIRECTOR_FUNDING, VICE_PRESIDENT

## **Approval Process for Project Approver**

This section discusses the Approval Process for Project Approver workflow, which includes these events:

- Approval process event.
- Return event.

**Approval Process Event**

<b>Event Description</b>	This event is triggered when a user clicks the Submit button on the Project Request page (BC_PROJ_REQUEST1).
<b>Action Description</b>	The system sends a worklist item to the individual who is identified in the Approver field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Submitted</i> .
<b>Notification Method</b>	Worklist

**Workflow Objects**

<b>Event</b>	APPROVAL_PROCESS
<b>Approval Rule Set</b>	PPK_PROJ_APPROVAL
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_PRJ_APPROVE_ACTIVITY
<b>Role</b>	SUPERVISOR, MANAGER, VICE_PRESIDENT

**Return Event**

<b>Event Description</b>	This event is triggered when an approver clicks the Return button on the Project Request Approval page. (BC_PROJ_REQUEST1).
<b>Action Description</b>	The system sends a worklist item to the individual who is identified in the Requester field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Returned</i> .
<b>Notification Method</b>	Worklist

**Workflow Objects**

<b>Event</b>	RETURN_EVEN
<b>Approval Rule Set</b>	PPK_PROJ_APPROVAL
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_PRJ_APPROVE_ACTIVITY
<b>Role</b>	SUPERVISOR, MANAGER, VICE_PRESIDENT

## Notification for Approved or Denied Request

This section discusses the Notification for Approved or Denied Request workflow, which includes these events:

- Approver send email.
- Notify sponsor.
- Notify project manager.

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**Note.** This activity is active only if funding manager approval is *not* required, which you establish at the installation level by using the Program Management page (INSTALLATION\_PGM) in the Installation Options component (INSTALLATION).

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### ***Approver Send Email Event***

<b>Event Description</b>	This event is triggered when a project request is approved or denied by the project request approver.
<b>Action Description</b>	The system sends an email to the individual who is identified in the Requester field on the Project Request page (BC_PROJ_REQUEST1).
<b>Notification Method</b>	Email

### ***Workflow Objects***

<b>Event</b>	Approver Send Email
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_APR_DENY_OWNER
<b>Role</b>	None

### ***Notify Sponsor Event***

<b>Event Description</b>	This event is triggered when a project request is approved or denied by the project request approver.
<b>Action Description</b>	The system sends an email to the individual who is identified in the Sponsor field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Approved</i> or <i>Denied</i> as appropriate.
<b>Notification Method</b>	Email

**Workflow Objects**

<b>Event</b>	TO_SPONSOR
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_APR_DENY_OWNER
<b>Role</b>	None

**Notify Project Manager Event**

<b>Event Description</b>	This event is triggered when a project request is approved or denied by the project request approver.
<b>Action Description</b>	The system sends an email to the individual who is identified in the Project Manager field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Approved</i> or <i>Denied</i> as appropriate.
<b>Notification Method</b>	Email

**Workflow Objects**

<b>Event</b>	PRJ_MGT
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_APR_DENY_OWNER
<b>Role</b>	None

**Notification for Funding Department Manager Approved or Denied Request**

This section discusses the Notification for Funding Department Manager Approved or Denied Request workflow, which includes these events:

- Approver send email.
- Notify sponsor.
- Notify project manager.

This workflow is only active if funding manager approval is required, which you establish at the installation level by using the Program Management page (INSTALLATION\_PGM) in the Installation Options component (INSTALLATION).

### ***Approver Send Email Event***

<b>Event Description</b>	This event is triggered when a project request is approved by all funding department managers or denied by any funding department manager.
<b>Action Description</b>	The system sends emails to the individuals who are identified in the Requester and Approver fields on the Project Request page (BC_PROJ_REQUEST1).
<b>Notification Method</b>	Email

### ***Workflow Objects***

<b>Event</b>	Approver Send Email
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_APR_DNY_FUND
<b>Role</b>	None

### ***Notify Sponsor Event***

<b>Event Description</b>	This event is triggered when a project request is approved by all funding department managers or denied by any funding department manager.
<b>Action Description</b>	The system sends an email to the individual who is identified in the Sponsor field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Approved</i> or <i>Denied</i> as appropriate.
<b>Notification Method</b>	Email

### ***Workflow Objects***

<b>Event</b>	TO_SPONSOR
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_APR_DNY_FUND

<b>Role</b>	None
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### ***Notify Project Manager Event***

<b>Event Description</b>	This event is triggered when a project request is approved by all funding department managers or denied by the project request approver.
<b>Action Description</b>	The system sends an email to the individual who is identified in the Project Manager field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Approved</i> or <i>Denied</i> as appropriate.
<b>Notification Method</b>	Email

### ***Workflow Objects***

<b>Event</b>	PRJ_MGT
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_APR_DNY_FUND
<b>Role</b>	None

## **Notification to Funding Manager**

This section discusses the Notification to Funding Manager workflow.

### ***Description***

<b>Event Description</b>	This event is triggered when the individual who is specified in the Approver field on the Project Request Page (BC_PROJ_REQUEST1) submits, approves, or declines a project request.
<b>Action Description</b>	The system sends an email notification to the individual who is identified in the Sponsor field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Submitted</i> .
<b>Notification Method</b>	Email

### ***Workflow Objects***

<b>Event</b>	Send Email mgts
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<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_EMAIL_ACTIVITY2
<b>Role</b>	None

## Notification to Project Sponsor

This section discusses the Notification to Project Sponsor workflow.

### *Description*

<b>Event Description</b>	This event is triggered when a project request is submitted for approval.
<b>Action Description</b>	The system sends an email notification to the individual who is identified in the Sponsor field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Submitted</i> .
<b>Notification Method</b>	Email

### *Workflow Objects*

<b>Event</b>	BC Send Email
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_SUBMIT_ACTIVITY
<b>Role</b>	None

## Request for Detail Project Plan

This section discusses the Request for Detail Project Plan workflow.

### *Description*

<b>Event Description</b>	This event is triggered when an approver clicks the Costing button on Project Request Approval page (BC_PRJ_APPROVAL).
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<b>Action Description</b>	The system sends a worklist item to the individual who is identified in the Project Manager field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to <i>Costing</i> .
<b>Notification Method</b>	Worklist

### ***Workflow Objects***

<b>Event</b>	COSTING_PLAN
<b>Approval Rule Set</b>	None
<b>Business Process</b>	PPK_PROJ_APPR_BP
<b>Activity</b>	PPK_PJ_COST
<b>Role</b>	None



# Index

## A

- account prompt table 15
- Additional Portfolio Measures page 38
- analysis
  - of project portfolios 85
  - portfolios 95
- Analysis Dimensions page 15
- Analyzer Options page 77
- analyzing project request impact 77
- analyzing project requests 76
- application overview 5
- approvals *See* workflows
- approval status 59
- approved status 21
- as of date x
- assessment rules 36
- attachments 57
- average probability of milestones 72

## B

- base currency
  - viewing amounts in 55
- BC\_ASSESS\_F00 8
- BC\_BENFT\_DET 64
- BC\_BENFT\_EST 8
- BC\_COST\_DET 64
- BC\_COST\_EST 8
- BC\_EST\_BENFT 64
- BC\_EST\_BENFT\_COM 64
- BC\_EST\_COST 63
- BC\_EST\_COST\_BENFT 64
- BC\_EST\_COST\_COM 63
- BC\_GENERAL\_PREF component 14
- BC\_KPI\_FILTER 90
- BC\_KPI\_FILTER\_ADV 90
- BC\_KPI\_FILTER\_VIEW 90
- BC\_PM\_OPTIONS 15
- BC\_PORTFLIO\_OBJ 88
- BC\_PORTFOLIO\_DFN 88
- BC\_PORTFOLIO\_DFN component 85, 87
- BC\_PRBUD\_FLT 29
- BC\_PRBUD\_FLT component 27
- BC\_PRJ\_APPROVAL 50
- BC\_PRJREQST\_DPN 8, 50
- BC\_PRJREQST\_DPN\_CM 50
- BC\_PRJREQST\_MST 8, 50
- BC\_PROJ\_ATTACH 9, 50
- BC\_PROJ\_REQUEST 8, 41
- BC\_PROJ\_REQUEST1 50
- BC\_PROJ\_REQUEST1 component 48
- BC\_PROJ\_ROL\_ST 15
- BC\_PROJ\_ROL\_ST\_VW 34
- BC\_PROJ\_ROL\_ST component 14
- BC\_PROJ\_ROL\_VW component 14
- BC\_PROJ\_SCR 9
- BC\_PROJ\_SCR\_CMP 9
- BC\_SETUP\_PROMPT 14

- benefits 63
  - project request, reviewing for 66
  - viewing by fiscal year or period 99
- Benefits page 66
- budget 14
- budget record, defining 30
- business processes 2
- business units
  - base currency, viewing project amounts in 55
  - general ledger 7, 65, 66
  - performance 7
  - requirements 7

## C

- calculation of scores 68
- canceling project requests 56
- confidence level 28
- Conversion Rate Type page 15, 19
- Convert Currency utility 102
- costs 63
  - capitalizing 65
  - defining budget record data 30
  - estimated 64
  - maintenance 55
  - project request, reviewing for 66
  - viewing by fiscal year or period 99
- critical success factor 6
- CSF *See* critical success factor
- currency 65, 102, 103
- currency conversion rate type 19
- currency conversion utility 103

## D

- data
  - supporting 13
  - tables 8
- database tables 8
- dates
  - changing 62
  - project request 52
- deferred processing ix
- Define Measures/Dimensions page 34
- DEPARTMENT\_TBL 16
- Department Budget Source component (BC\_PRBUD\_FLT) 27
- Department Budget Source page 29, 30
- department prompt table 15
- Dependency page 57
- description x
- dimension member selection rules 90, 92
- dimensions 34
  - analysis 23
  - overview 28
- Dim Member Select - Advanced Selection page 90, 92
- Dim Member Select - Dim Member Preview page

90  
 Dim Member Select page 90  
 discount rate 18, 81  
 Discount Rate page 15, 18  
 documentation  
   related x

## E

edit privileges 24  
 effective date x  
 elements, common x  
 email notification options 21  
 estimated benefits 66  
 estimated costs 64

## F

fiscal year xi  
 funding department manager approval 21

## G

gross score 72

## I

impact  
   project request, analyzing 76  
   project request, overview 76  
   project request, pages used to analyze 77  
 Impact Analyzer page 77, 79, 80  
 implementation overview 10  
 implementation steps 3  
 initiative type 32, 52  
 Initiative Type component PPK\_INITYPE\_TBL 27  
 Initiative Type page 29, 32  
 integration 21  
   PeopleSoft Enterprise Project Costing 11  
   using project data 11  
 Integration page 15, 21  
 integration settings 21

## J

job ID xi

## K

KBO  
   Primary KBO portfolio 56  
   scores, establishing 67  
   support 56  
 KBO support 72  
 key business objective *See* KBO

key performance indicators  
   definition 6  
   delivered 6, 112  
   delivered, installing 7  
   delivered, naming convention for 7  
   overview 109  
   terminology 109  
 KP\_DATAVALS\_F00 8  
 KP\_KPI\_ASMT\_F00 8  
 KP\_KPI\_CALC\_F00 8  
 KP\_KPI\_OVRD\_F00 8  
 KP\_OBJ\_RULE\_F00 8  
 KP\_TRGTVALS\_F00 8  
 KPIs *See* key performance indicators

## L

last run on x

## M

maintenance costs 55  
 measures  
   defining 34  
   overview 28  
   viewing 38  
 Measures and Dimensions component  
   (PPK\_MSRS\_DIM) 27  
 Milestone component (PPK\_MILESTONE) 27  
 Milestone page 29, 32  
 milestones  
   associating with project requests 57  
   average probability 72  
   defining 32  
   overview 27  
   probability 102  
   risk 27, 33  
   risk, assigning 73  
   standard 27  
   updating 102  
 model ID xi

## N

net score 72

## O

operationally approved status 21  
 options  
   establishing 13  
   overview 14  
   pages used to establish 14  
 overview  
   deferred processing ix  
   portfolios 85  
   program options 14  
   Project Portfolio Management 5  
   user preferences 36

## P

- PeopleSoft Enterprise Scorecard x
- PeopleSoft Program Management 21
- period xi
- portfolio analysis
  - defaults 37
  - defining data for 34
  - specifying additional measures 38
- Portfolio Analysis Defaults page 37
- Portfolio Analysis Search page 99
- Portfolio Definition - Component Weighting page 69
- Portfolio Definition - Dimension Member Selection page 88, 89
- Portfolio Definition component (BC\_PORTFOLIO\_DFN) 85, 87
- Portfolio Definition page 69, 88
- portfolios
  - establishing 87
  - overview 7, 85
  - pages used to establish 88
  - project 85
  - score group 69
  - selection rules for *See Also* selection rules
  - specifying projects for 89
  - tree 86
  - tree structure requirements 86
- PPK\_DIM\_LIST 15
- PPK\_DISC\_RATE 15
- PPK\_INITYPE\_TBL 29
- PPK\_INITYPE\_TBL component 27
- PPK\_MILESTONE 29
- PPK\_MILESTONE component 27
- PPK\_MSRS\_DIM component 27
- PPK\_MST\_TBL 9
- PPK\_PG\_SETUP 15
- PPK\_PR\_RISK\_ELM 9
- PPK\_PR\_SCR\_RC 9
- PPK\_PRIORITY\_UPD 29
- PPK\_PRIORITY\_UPD component 27
- PPK\_PROCESS 103
- PPK\_PROJREQ\_AUD 8, 50
- PPK\_RISK\_ELEMENT 30
- PPK\_RISK\_ELEMENT component 27
- PPK\_RISK\_TBL 9
- PPK\_RT\_TYPE 15
- PPK\_TOT\_COST 9
- PPK\_USER\_PREFER component 36
- PPK\_WF\_OPTIONS 15
- PPK\_XREF\_INQ component 76
- PPK\_XRF\_FINVW 77
- PPK\_XRF\_PRLIST 77
- PPK\_XRF\_PROJVW 77
- PPM Preferences component (BC\_GENERAL\_PREF) 14
- PPM Prompt Tables page 14, 15
- preferences
  - establishing 36
  - system 13
  - user 14
- present value of benefits 56
- primary risk 71
- Priorities page 29
- priority
  - of project requests 52
- Priority component (PPK\_PRIORITY\_UPD) 27
- Privileges for Project Request and Templates page 15
- Privileges for Project Requests and Templates component (BC\_PROJ\_ROL\_ST) 14
- Privileges for Project Requests and Templates page 26
- probability of milestones 102
- process
  - scorecard assessment 101
  - Update Milestone Probabilities 102
- Process Currency Conversions page 103
- process flow 9
- processing 101
- program name x
- Project Approval page 50, 59
- project data, loading 11
- project IDs
  - prefix 18
  - prefix override for business units 18
  - sequence 18
  - system generated 16
- Project Period View page 100
- Project Portfolio Management
  - application overview 5
  - business processes 2
  - data tables 8
  - main components 5
  - overview 1
  - task summary 9
- project portfolios *See Also* portfolios
  - analyzing 94
  - pages used to analyze 95
  - viewing 95
- project portfolio tree
  - creating 94
  - overview 86
  - required structure 86
- Project Request - Attachments page 50
- Project Request - Benefit Comments page 64
- Project Request - Benefits page 64
- Project Request - Costs Comments page 63
- Project Request - Costs page 63, 64
- Project Request - Dependency Comments page 50
- Project Request - Dependency page 50
- Project Request - Milestones page 50, 57
- Project Request - Scoring page 71
- Project Request - Status History page 50, 58
- Project Request - Summary Costs/Benefits page 64, 66
- Project Request Analysis by Department component (PPK\_XREF\_INQ) 76
- project request approval workflow 46
- Project Request Benefit Details page 64
- Project Request component (BC\_PROJ\_REQUEST) 41
- Project Request Cost Details page 64
- Project Request Date Change Option page 62
- Project Request ID Sequencing 15
- Project Request ID Sequencing page 16
- Project Request page 50, 51
- project requests
  - adding attachments 57
  - analyzing impact 77
  - canceling 56
  - copying 59
  - costing 48
  - costs 64
  - creating 48, 50

- defining costs and benefits 63
- defining dependencies with other projects 57
- errors, resolving 63
- establishing 51
- estimated benefits 66
- impact 76
- maintenance costs 55
- milestones, adding 57
- overview 7
- pages used to create 50
- priority 52
- reviewing benefits 66
- reviewing costs 66
- status, history 58
- status of 53
- submitting for approval 56
- templates, overview 41
- versions 56
- Project Requests - Risk Elements page 27
- Project Requests - Scoring page 67
- Project Requests component (BC\_PROJ\_REQUEST1) 48
- project request status
  - workflow impact 43

## R

- ranking
  - portfolio components 68
  - project requests 68
- report ID x
- return on investment *See* ROI
- risk elements 27, 34, 73
- Risk Elements component (PPK\_RISK\_ELEMENT) 27
- Risk Elements page 30, 73
- risk level 72
- risk milestones
  - assigning 73
  - definition 27
- risks
  - defining types of 34
  - milestones 33
  - primary 71
  - Primary Risk portfolio 56
  - project request 56
  - scores, establishing 67
  - tracking and measuring 27
- ROI 56
- run control ID x

## S

- Save Options page 59
- scenario ID xi
- Scorecard Assessment Application Engine process (BC\_ASSESS) 101
- scorecards
  - definition 6
- score groups 67
  - assigning to a project request 71
  - defining *See Also* scores
  - ranking components 69
- scores 67

- calculation 68
- determining 71
- for risk, adjusting 68
- gross 68
- net 68
- score type 73
- security
  - establishing 14
  - for project requests and templates, setting up 24
  - overview 3
- Security component (BC\_PROJ\_ROL\_VW) 14
- Security page 15, 24
- selection rules
  - pages used to establish 90
- setID x
- standard milestones 27
- status x, 53
  - approved 21, 45
  - costing 46
  - declined 45, 46
  - impact of workflow on 43
  - operationally approved 21, 45
  - pending 44
  - returned 45, 46
  - submitted 44
- strategic thrust 6
- strategy components
  - definition 6
- submitting project requests for approval 56
- supporting data 13
- system options
  - establishing 14
  - overview 13

## T

- tables
  - database 8
- templates 41
  - creating 59
  - defining privileges for 26
- transaction currency
  - viewing amounts in 55
- trees
  - project portfolio *See Also* project portfolio tree
  - strategy 88

## U

- Update Milestone Probabilities Application Engine process (PPK\_UPD\_MST) 102
- Update Milestone Probabilities page 103
- User Portfolio Preferences component (PPK\_USER\_PREFER) 36
- user preferences
  - for portfolio analysis 14, 36
  - overview 36
  - pages used to establish 37

## V

Variance Analyzer page 77, 82  
version 56  
vision 6

## W

when x

Workflow Options page 15, 20

workflows

- activating 20

- delivered 113

- diagram for project request approval 46

- for project request approvals 43

- notification options 21

- options 20

- project request approval 113

- requiring funding department manager

  - approval 21

- setting options for 20