PeopleSoft®

PeopleSoft Program Management 8.8 PeopleBook

December 2003

PeopleSoft Program Management 8.8 PeopleBook
SKU FSCM88PGM-B 1203

Open Source Disclosure

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About These PeopleBooks

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical elements and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection web site. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection web site, access the PeopleSoft Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

A note that is preceded by *Important!* is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager — Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

PeopleSoft Program Management Preface

This preface discusses:

- PeopleSoft application fundamentals.
- Pages with deferred processing.
- Common elements in this PeopleBook.

Note. This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or it is documented with the common elements for the section, chapter, or PeopleBook.

PeopleSoft Application Fundamentals

The *PeopleSoft Program Management PeopleBook* provides you with implementation and processing information for your PeopleSoft Program Management system. Additional, essential information describing the setup and design of your system can be found in companion documentation, *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook*. The companion documentation consists of important topics that apply to many or all PeopleSoft applications across the Financials, Enterprise Service Automation, and Supply Chain Management product lines. You should be familiar with the contents of these PeopleBooks.

The following companion PeopleBooks apply specifically to PeopleSoft Program Management:

- *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook.*
- *Setting Up Global Options and Reports PeopleBook.*
- *PeopleSoft Project Costing PeopleBook.*
- *PeopleSoft Resource Management PeopleBook.*
- *PeopleSoft Services Forecasting PeopleBook.*
- *Working With Third-Party Applications PeopleBook.*

Pages with Deferred Processing

Several pages in PeopleSoft Program Management operate in deferred processing mode. Most fields on these pages are not updated or validated until you save data on the page or refresh the view by clicking a button, link, or tab. Delayed processing has various implications for the field values on the page. For example, if a field contains a default value, any value you enter before the system updates the page overrides the default. In addition, deferred processing pages display updated quantity balances or totals only when you save or otherwise refresh the page.

See the guidelines for designing pages in *PeopleTools PeopleBook: PeopleSoft Application Designer*.

Common Elements Used in this PeopleBook

Actual Cost of Work Performed (ACWP)
Actual cost incurred on work to date on an activity (task) or an entire project. In PeopleSoft Program Management, the system determines this value by using the cost analysis group defined for the project, and summing all actual amounts in that analysis group with an accounting date less than or equal to today's date.

Actual Work
The actual number of hours spent by a resource on an activity. It is captured in PROJ_RESOURCE at the project activity resource detail from many different sources including PeopleSoft Expenses, and PeopleSoft Time and Labor. Actual work at the activity level is calculated by rolling up the detailed actual rows.

As of Date
Last date for which a report or process includes data.

Business Unit
Identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Budgeted Cost of Work Performed (BCWP)
Also referred to as earned value, BCWP is the budgeted cost based on percent complete. BCWP is zero until work is started on an activity (that is, when percent complete is no longer zero). The calculation is based on percent complete, as compared with the activity's duration. In PeopleSoft Program Management to determine this value, the system:

1. Determines the budget date as *Activity Start Date* + (*Duration* × *Percent Complete*)
2. Uses the budget analysis group on the report request page and sums all budget amounts in that analysis group with an accounting date less than or equal to the budget date.

Budgeted Cost of Work Scheduled (BCWS)
The budgeted costs up to the current date. Using the Budget Analysis group on the report request page, this value is the sum of all budget amounts in that analysis group with an accounting date less than or equal to today's date.

Cost Performance Index (CPI)
Ratio of work accomplished versus cost of work incurred for a specified time period. The CPI is an efficiency rating for work accomplished for resources expended.

Description
Any text up to 30 characters.

Duration
Duration is the length of time needed to complete an activity. In PeopleSoft Program Management, duration is more precisely defined as the number of business days between an activity's start and end dates.

Effective Date
Date on which a table row becomes effective, or the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

you can view and change the information. Pages or batch processes that use information with an effective date use the current row.

See *Using PeopleSoft Applications PeopleBook*, *"Using Effective Dates"*

EmplID (employee ID) Unique identification code for an individual associated with your organization.

Enterprise Program Tree A hierarchical structure of projects and programs created and managed by using PeopleSoft Tree Manager. In this tree, the root node must be a program, which can contain multiple programs and detail projects under it. An enterprise program tree is established for each project business unit.

Estimate to Complete (ETC) An estimate of the time or effort required to complete the activity. Expressed in either dollars or hours.

Forecast Horizon The period of time for which a resource is expected to forecast hours at a detailed level.

Forecast Period The frequency at which resources are expected to update and submit forecasted hours.

Generic Resource A labor resource that does not have an employee ID (EmplID) associated with it. You can identify a generic resource by entering the resource's name or the role in cases where a you need to assign a resource to work on an activity, but the specific employee has not yet been identified.

Percent Complete A measure of the progress or completeness of an activity or project. These methods are used to determine percent complete, depending on what is being measured:

- Duration: ((*Original Duration* − *Remaining Duration*) ÷ *Original Duration*) × 100
- Manual: entered manually.
- Units: *Budgeted Hours* − (*Actual Hours* ÷ *Budgeted Hours*) × 100
- Amounts: *Budgeted Amount* − (*Actual Amount* ÷ *Budgeted Amount*) × 100

Process Frequency Designates the appropriate frequency in the Process Frequency group box:

Once executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to *Don't Run*.

Always executes the request every time the batch process runs.

Don't Run ignores the request when the batch process runs.

Program A vehicle for grouping detail projects for the purposes of reporting and management. A program cannot have activities or resources directly associated to it but can have projects that appear under it in the hierarchy of an enterprise program tree.

Project A vehicle for identifying an initiative that has a specified start and end date. A project can be either a detail project, which allows for activities and resources to be associated with it, or a program.

Project Request	A vehicle for officially requesting and justifying that the organization expend funds and effort for a finite period of time. You can submit different business case scenarios by entering multiple versions of a project request into the system, however, only one version of a request can be approved.
Report ID	Unique report identifier.
Report Manager	This link accesses the Report List page, where you can view report content, check the status of a report, and view content detail messages that show you a description of the report and the distribution list.
Process Monitor	This link accesses the Process List page, where you can view the status of submitted process requests.
Remaining Work	Remaining work, also known as estimate to complete (ETC). *ETC = Work − Actual Work*.
Run	This button accesses the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Run Control ID	Identification code that identifies the run parameters for a report or process.
Schedule Method	The concept of schedule method is important to keeping the relationship between work, duration, and resources synchronized. Schedule method is an activity-level field that indicates which variable in the formula (*# of Resources* × Sum (*Resource Effort*) ÷ *# of Resources*) × *Duration* = *Work* is constant. Options are *Fixed Work, Fixed Duration*, or *Fixed Resources*.
Schedule Performance Index (SPI)	Ratio of work accomplished versus work planned, for a specified time period. The SPI is an efficiency rating for work accomplishment, comparing work accomplished to what should have been accomplished.
SetID	Identification code that represents a set of control table information or TableSets. A TableSet is a group of tables (records) necessary to define your company's structure and processing options.
Status	Indicates whether a row in a table is *Active* or *Inactive*. You cannot display inactive rows on transaction pages or use them for running batch processes. To maintain an audit trail, it is more prudent to deactivate rather than delete data that you no longer use .
User ID	System identifier for the individual who generates a transaction.
Work	The total number of hours spent or to be spent by a resource on an activity. Work does not equal duration. For example, the expected duration of a given activity can be 5 days but the work assigned to the activity may be 80 hours with two resources working on the activity. Work needs to be defined at the activity level. Work will always be defined in hours.
Work Breakdown Structure (WBS)	A tree-based hierarchical structure of the activities that must be accomplished to complete a project.

See Also

PeopleTools PeopleBook: Process Scheduler, "Understanding PeopleSoft Process Scheduler"

CHAPTER 1

Getting Started with PeopleSoft Program Management

This chapter provides an overview of PeopleSoft Program Management and discusses:

- PeopleSoft Program Management business processes.
- PeopleSoft Program Management integration points.
- PeopleSoft Program Management implementation tasks.

PeopleSoft Program Management Overview

Large enterprises and project-based organizations have long recognized the value of leveraging project management techniques and knowledge across multiple projects. PeopleSoft Program Management enables program and project managers to plan and manage complex programs and projects across an organization by applying common standards and procedures, providing sophisticated tools and analyses, and integrating critical program and project information with other PeopleSoft applications, as well as non-PeopleSoft applications. PeopleSoft Program Management provides the tools for an organization to efficiently conduct the process of managing programs and projects from their inception to their closure.

The main functional areas of PeopleSoft Program Management include:

- Program management.
- Project planning and estimating.
- Project collaboration.
- Modeling and analysis.

Program Management

A program is an initiative that is composed of one or more projects. Usually there is a theme associated with a program, and all the projects within a program support that theme. You establish a tree, referred to as an enterprise program tree, to define the hierarchical relationship of a business unit's programs and their associated projects.

The data for all projects within a program are summarized at the program level, enabling program managers to quickly and easily assess how well a program is progressing.

Project Planning and Estimating

Project planning and estimating are the building blocks of successful project management. In PeopleSoft Program Management, project managers are provided with the tools to easily copy a project template, list activities, relate activities, build a work breakdown structure (WBS), schedule activities, assign resources, and estimate project costs. These capabilities enable the organization to harness and organize the project plan data which exist in users' desktop project scheduling tool files. With PeopleSoft Program Management, project plan data can be aggregated and fully integrated with your back-office project accounting system.

Project management features include:

- Scheduling activities, assigning resources, assessing project health, and tracking costs.
- Managing the lifecycle of a project, from submission of a project request through project approval and execution to completion.
- Managing change and tracking issues to process any problems that arise and the changes that are required to resolve them.
- Creating and using project templates to standardize best practices.

Project Collaboration

Increased project collaboration has a direct relationship with project success. PeopleSoft Program Management incorporates several collaborative features such as issue management, services forecasting, deliverables, and status reporting into the resource and project portfolio management business process.

Modeling and Analysis

The system enables you to analyze various aspects of programs, projects, and resources including:

- Comparison of budgeted costs to actual amounts.
- Resource usage.
- Earned value.
- Estimate to complete variance.
- Resource utilization.

PeopleSoft Program Management Business Processes

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

- Create and submit one or more versions of a project request.
  - Route project requests to the parties responsible for operationally and financially authorizing the initiation of a project or program.
  - Create bottoms-up business case justifications for a project or program.

- Create project.
  - Define project scope and deliverables.
  - Define tasks and work breakdown structure, schedule, and milestones.
  - Establish budget, if not predetermined.
  - Obtain approval to begin project.
  - Define resources.
- Assign resources to project.
  - Define resource requirements.
  - Assign generic resources during planning phases.
  - Search for top candidates.
  - Create assignments from search results.
  - Directly assign specific resources.
- Manage project.
  - Review and analyze project deliverables, deliverable quality, schedule, milestones, activities, resources and costs.
  - Manage status reporting.
  - Track and manage issues.
  - Review and forecast remaining work.

PeopleSoft Program Management Integration Points

PeopleSoft Program Management integrates with these PeopleSoft applications:

- PeopleSoft Project Costing.

  Creates project-related accounting entries that account for resource and activity costs.
- PeopleSoft Resource Management.

  Provides detailed resource availability information and generates service orders.
- PeopleSoft Project Portfolio Management.

  Analyzes project request feasibility and costs; sends project request data to PeopleSoft Program Management.

Because PeopleSoft Program Management shares information with other PeopleSoft and non-PeopleSoft applications to provide complete business processes, you should plan to work closely with the implementation teams responsible for installing and configuring the other applications to ensure that you obtain the full functionality and efficiency that your organization requires.

We cover integration considerations in the implementation chapters in this PeopleBook. Integration with Microsoft Project is discussed in the PeopleSoft Project Costing PeopleBook. Supplemental information about other third-party application integrations is on the PeopleSoft Customer Connection website.

See Also

Chapter 12, "Integrating with Other Applications," page 127

PeopleSoft Program 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.

Note. Implementing PeopleSoft Project Costing is a prerequisite for installing PeopleSoft Program Management.

Other Sources of Information

In the implementation planning phase, take advantage of all PeopleSoft information sources, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources is located in the preface of the *PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook*, with information on where to find the most current version of each document.

See Also

PeopleSoft Project Costing 8.8 PeopleBook, "Getting Started with PeopleSoft Project Costing"

PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook, "PeopleSoft Application Fundamentals PeopleBook Preface," Additional Resources

PeopleTools PeopleBook: PeopleSoft Integration Broker

CHAPTER 2

Navigating in PeopleSoft Program Management

This chapter describes how to navigate in PeopleSoft Program Management.

Navigating in PeopleSoft Program Management

PeopleSoft Program Management provides custom navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note. In addition to the PeopleSoft Program Management custom navigation pages, PeopleSoft provides menu navigation and standard navigation pages.

See Also

Using PeopleSoft Applications PeopleBook

Pages Used to Navigate in PeopleSoft Program Management

This table lists the custom navigation pages that are used to navigate in PeopleSoft Program Management:

Page Name	Navigation	Usage
Program Management Center	Program Management, Program Management Center	Access primary PeopleSoft Program Management menu options and activities.
Configuration	Click the Configuration link on the Program Management Center page.	Access options for configuring PeopleSoft Program Management.
Activity Options	Click the Activity Options link on the Configuration page.	Access pages for setting up activity options, activity types, activity type status path, quality types, and status.
Common Definitions	Click the Common Definitions link on the Configuration page.	Access pages for establishing interest types, period calculation factors, transaction codes, job codes, job records, reporting groups, SQR reports, utilization definitions, and forecasting options.

Page Name	Navigation	Usage
General Options	Click the General Options link on the Configuration page.	Access pages for establishing organization hierarchy, accounting rules, change control templates, asset profiles, issue priorities, issue status, issue types, and budgeted items.
Installation and Business Unit	Click the Installation and Business Unit link on the Configuration page.	Access pages for establishing project costing business units, project costing options, program management options, project costing integration, project costing installation options, program management installation options, analytics installation option, and general installation options.
Pricing Structure	Click the Pricing Structure link on the Configuration page.	Access pages for establishing burden plans, burden templates, rate templates, rates by employee, rates by job code, and rates by role.
Project Options	Click the Project Options link on the Configuration page.	Access pages for establishing project options.
Project Request Options	Click the Project Request Options link on the Configuration page.	Access pages for establishing project request options.
Project Security	Click the Project Security link on the Configuration page.	Access pages for setting up project security.
Third-Party XML Definitions	Click the Third-Party XML Definitions link on the Configuration page.	Access pages for establishing third-party XML definitions.
Transaction Options	Click the Transaction Options link on the Configuration page.	Access pages for establishing transaction options.
Forecasting	Click the Forecasting link on the Program Management Center page.	Access pages for creating, updating, and viewing forecasting information.
My Projects	Click the My Projects link on the Program Management Center page.	Access the My Projects page, where you can manage your personal list of projects.
Program Tools	Click the Program Tools link on the Program Management Center page.	Access pages for reviewing program progress.
Project and Activity	Click the Project and Activity link on the Program Management Center page.	Access options for project and activity information.
Activity Definitions	Click the Activity Definitions link on the Project and Activity page.	Access pages for creating, updating, and viewing activity information.

Page Name	Navigation	Usage
Project Definitions	Click the Project Definitions link on the Project and Activity page.	Access pages for creating, updating, and viewing project information.
Project Management	Click the Project Management link on the Program Management Center page.	Access pages for reviewing project progress.
Project Requests	Click the Project Requests link on the Program Management Center page.	Create, update, and view project request information.
Reports and Analysis	Click the Reports and Analysis link on the Program Management Center page.	Access options for reviewing program management data using reports and embedded analytics.
Interactive Reports	Click the Interactive Reports link on the Reports and Analysis page.	Access pages for reviewing program management data using embedded analytics.
Reports	Click the Reports link on the Reports and Analysis page.	Access pages for reviewing program management data using reports.
Third Party Integration	Click the Third Party Integration link on the Program Management Center page.	Access pages for managing integration with third-party applications.
Maintain Preferences	Click the Maintain Preferences link on the Program Management Center page.	Access the Preferences page, where you can modify or review your user preferences for managing projects.

CHAPTER 3

Setting Up PeopleSoft Program Management

This chapter discusses how to:

- Establish project request options.
- Define program management options.

Establishing Project Request Options

This section provides an overview of project request options and 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.
- Define initiative types.
- Define project request priorities.
- Define project request edit privileges.
- View project request edit privileges.

Note. If you intend to install and use PeopleSoft Project Portfolio Management in conjunction with PeopleSoft Program Management, your users will enter, update, review, and approve project requests in the PeopleSoft Project Portfolio Management application in the PeopleSoft EPM database. In this case, you do not need to setup the Project Request Options in the PeopleSoft FSCM database for PeopleSoft Program Management. Instead, you will setup the project request options in the PeopleSoft Project Portfolio Management application. For instructions regarding the setup of project request options in the PeopleSoft EPM database, refer to the PeopleSoft Project Portfolio Management PeopleBook .

Understanding Project Request Options

The project request options establish which records to use for various prompt tables, control how project request IDs are generated, define discount rates and currency conversion rate types, establish identifiers that map each type of project initiative to a project owner, establish project request priorities, and specify which users can edit project request data.

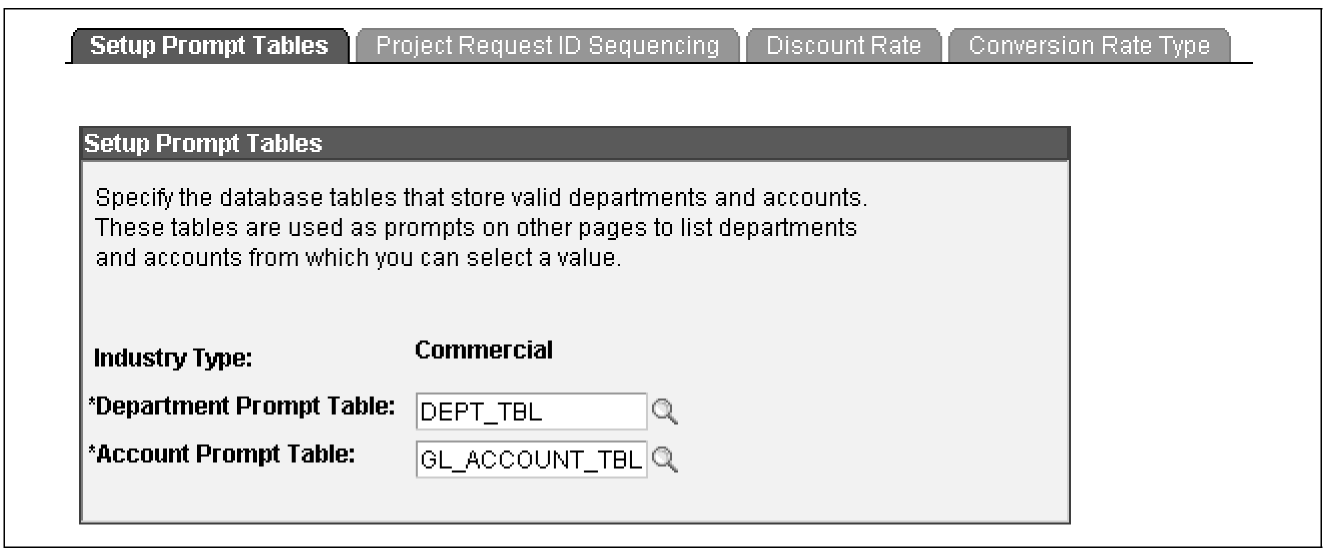
Pages Used to Establish Project Request Options

Page Name	Object Name	Navigation	Usage
Setup Prompt Tables	BC_SETUP_PROMPT	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Setup Prompt Tables	Specify which tables the system should use to prompt for department and account data.
Project Request ID Sequencing	BC_PM_OPTIONS	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Project Request ID Sequencing	Specify how project request IDs are generated.
Discount Rate	PPK_DISC_RATE	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Discount Rate	Specify the rate that can be used to discount project requests' cash flows when calculating financial return metrics, such as net present value and return on investment. PeopleSoft Program Management provides the ability to setup this discount rate, however, as delivered, the interactive reports do not use this rate to generate financial metrics.
Currency Conversion Rate	PPK_RT_TYPE	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Conversion Rate Type	Specify which rate type the system uses for currency conversions of project request cost and benefit amounts.
Initiative Type Mapping	PPK_INITYPE_TBL	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Initiative Types	Set up a unique identifier that maps the type of project initiative to a project owner.
Setup - Priority Description	PPK_PRIORITY_UPD	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Project Request Priorities	Establish descriptions for the priority ratings that are assigned to project requests.

Page Name	Object Name	Navigation	Usage
Privileges for Project Request	BC_PROJ_ROL_ST	• Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Setup Privileges • Click Add Role or click a <ROLENAME> on the Privileges for Project Request - Role Selection page.	Specify project request edit privileges by role and status, or remove a role's privileges.
Privileges for Project Request - Role Selection	BC_PROJ_ROL_ST_VW	Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, View Privileges	Review project request edit privileges by role and status.

Defining Prompt Tables for Department and Account Data

Access the Setup Prompt Tables page.



Setup Prompt Tables page

Department Prompt Table

Select the PeopleSoft record name 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. PeopleSoft Program Management is delivered with the value *DEPT_TBL* in this field. Most organizations would simply accept this value, which is the standard department record used in the PeopleSoft FSCM database by all of the PeopleSoft Financials applications.

Account Prompt Table

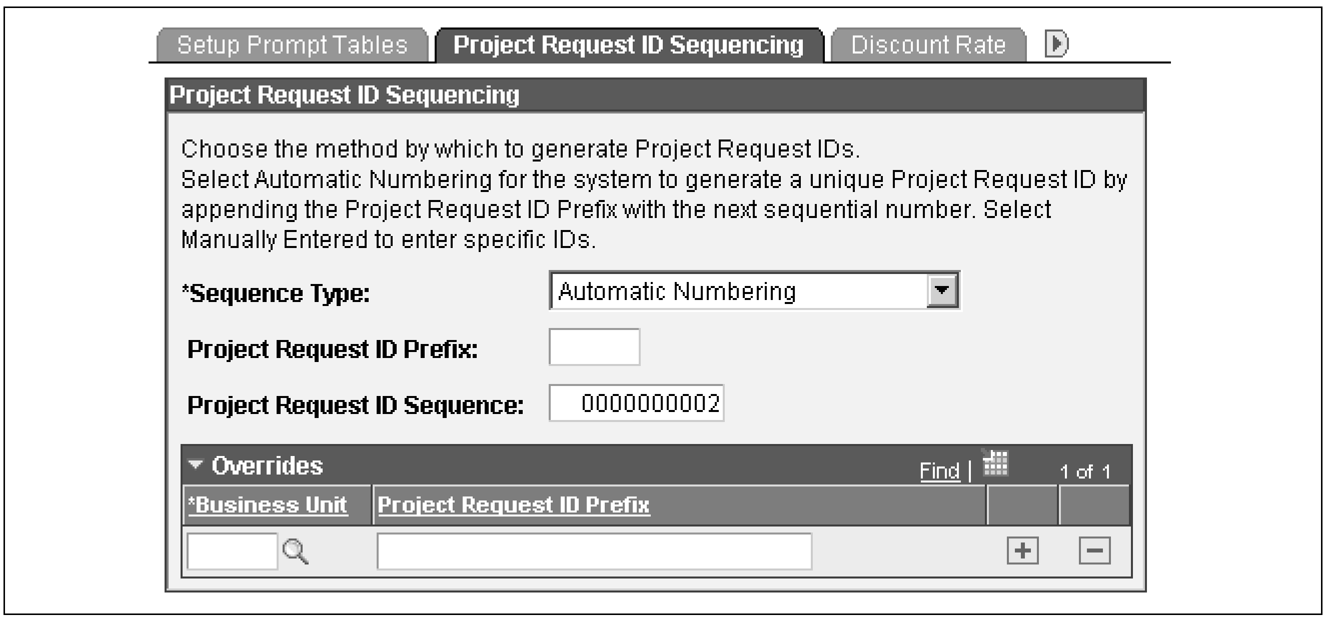
Select the table that contains account data.

The system uses this table 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 table that accurately depicts the account hierarchy as defined within the general ledger business unit. The table must be keyed by setID and contain a DESCR field.

Note. PeopleSoft Program Management is delivered with the value *GL_ACCOUNT_TBL* in this field. Most organizations would simply accept this value, which is the standard account record used in the PeopleSoft FSCM database by all of the PeopleSoft Financials applications.

Defining How the System Generates Project Requests IDs

Access the Project Request ID Sequencing page.



Project Request ID Sequencing page

Project Request ID Sequencing

Sequence Type

Specify how project request IDs are assigned. Options are:

Automatic Numbering: Select to have the system automatically generate unique project request IDs for new project requests by pre-pending the project request ID prefix to the next number in sequence after the value shown in the Project Request ID Sequence field.

Manually Entered: Select to enter project request ID numbers manually when new project requests are created.

Project ID Prefix

Enter a prefix to use for project request IDs. The system appends the next available project request ID sequence number to this prefix when generating project request IDs.

Use the Overrides grid to specify different prefixes for specific business units.

This field is unavailable for entry when the sequence type is set to *Manually Entered.*

Project ID Sequence

Enter the initial number to use for project request IDs that are automatically generated. This number increments by one when a new project request is created.

This field is unavailable for entry when the sequence type is set to *Manually Entered.*

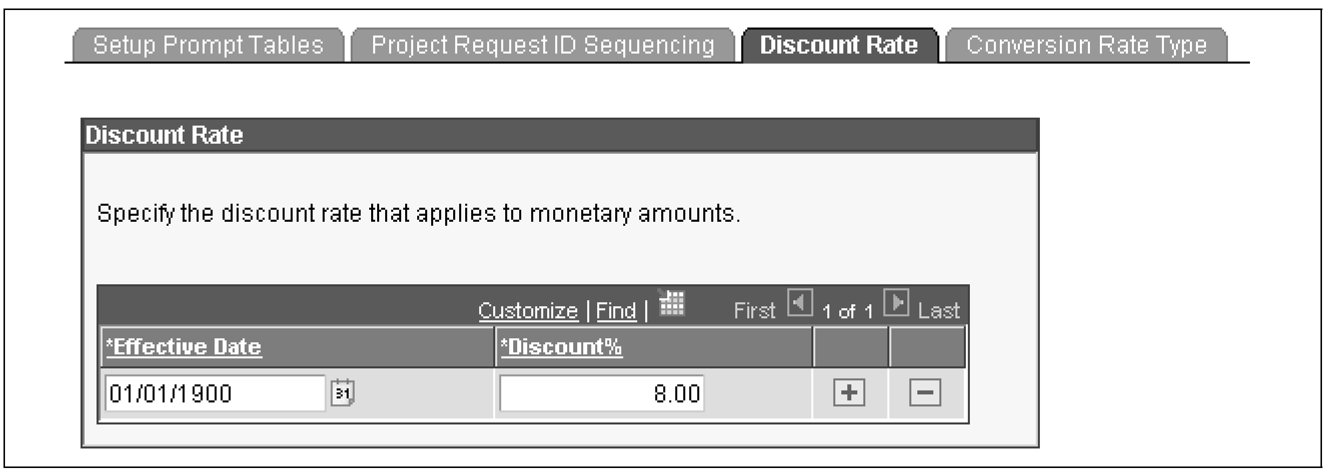
Note. Although the project request ID sequence number can be edited, PeopleSoft does not recommend changing it after project requests exist, because doing so could cause project request ID conflicts.

Overrides

Complete this grid to specify different project request ID prefixes for individual business units. Sequence numbers increment 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.



Discount Rate page

Discount% (Discount Percentage)

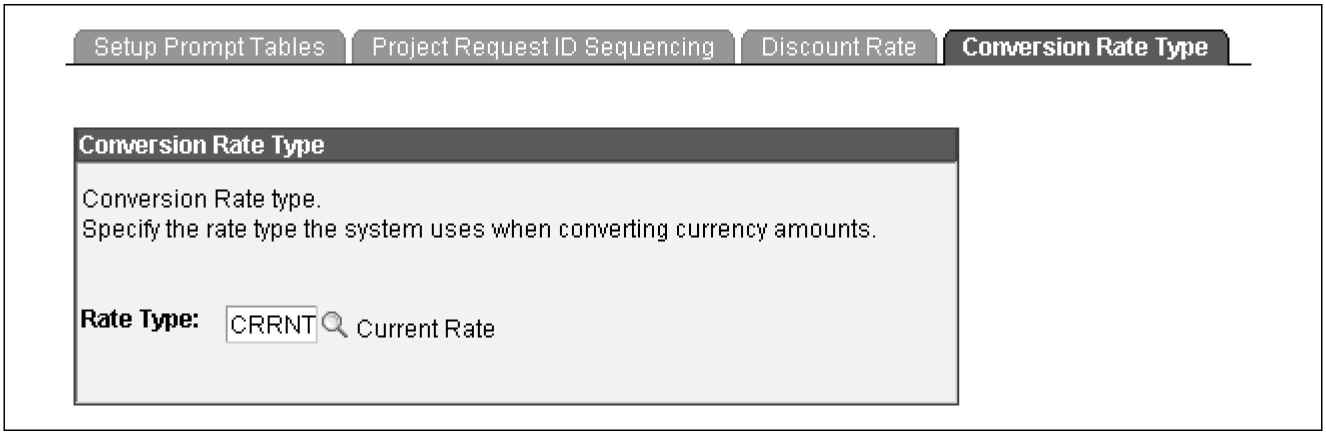
Enter the rate the system can use to discount the project request cost and benefit amounts to calculate financial metrics. This rate is not currently used in the delivered PeopleSoft Program Management interactive reports or project request.

Effective Date

The date upon which the discount percentage goes into effect. This allows you to change over time the rate at which your organization discounts cash flows.

Defining the Currency Conversion Rate Type

Access the Conversion Rate Type page.

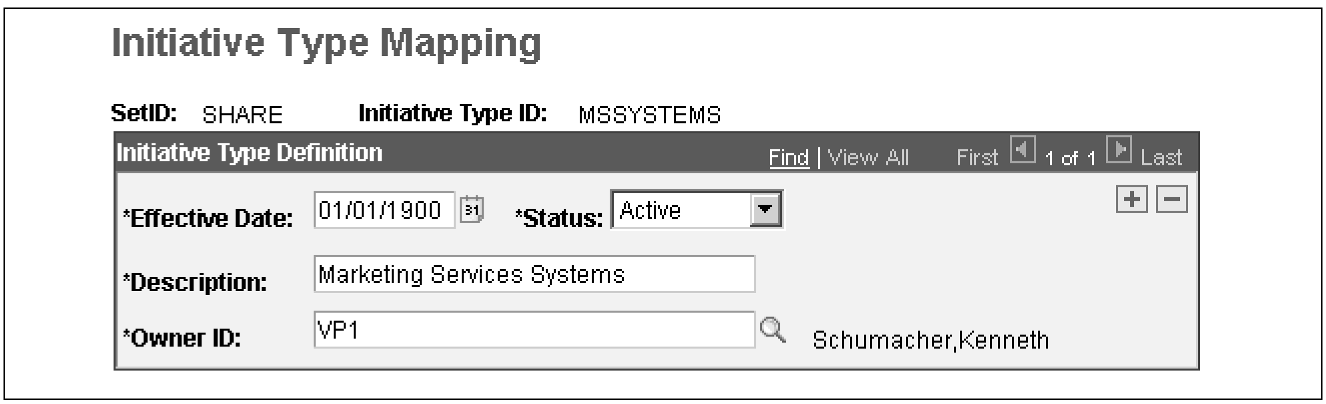


Conversion Rate Type page

Rate Type Select the rate type to use for currency conversions that occur within the Project Request component, and for conversions that are completed by using the Process Currency Conversions page.

Defining Initiative Types

Access the Initiative Type Mapping page.



Initiative Type Mapping page

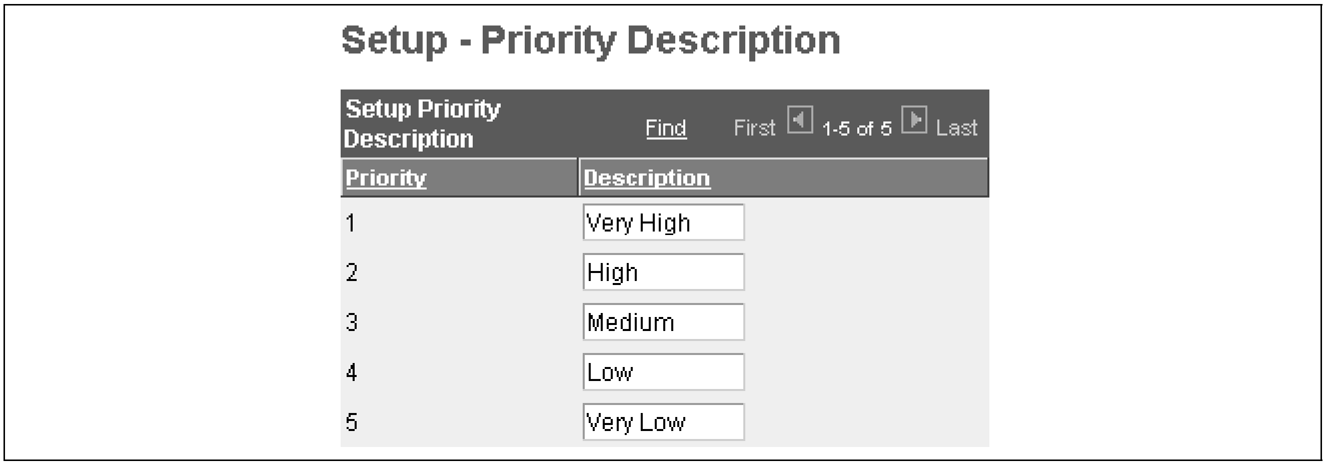
Initiative ID The unique identifier for the initiative type.

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

When you create project requests, you can associate them with an initiative type.

Defining Project Request Priorities

Access the Setup - Priority Description page.



Setup - Priority Description

Setup Priority Description — Find — First 1-5 of 5 Last

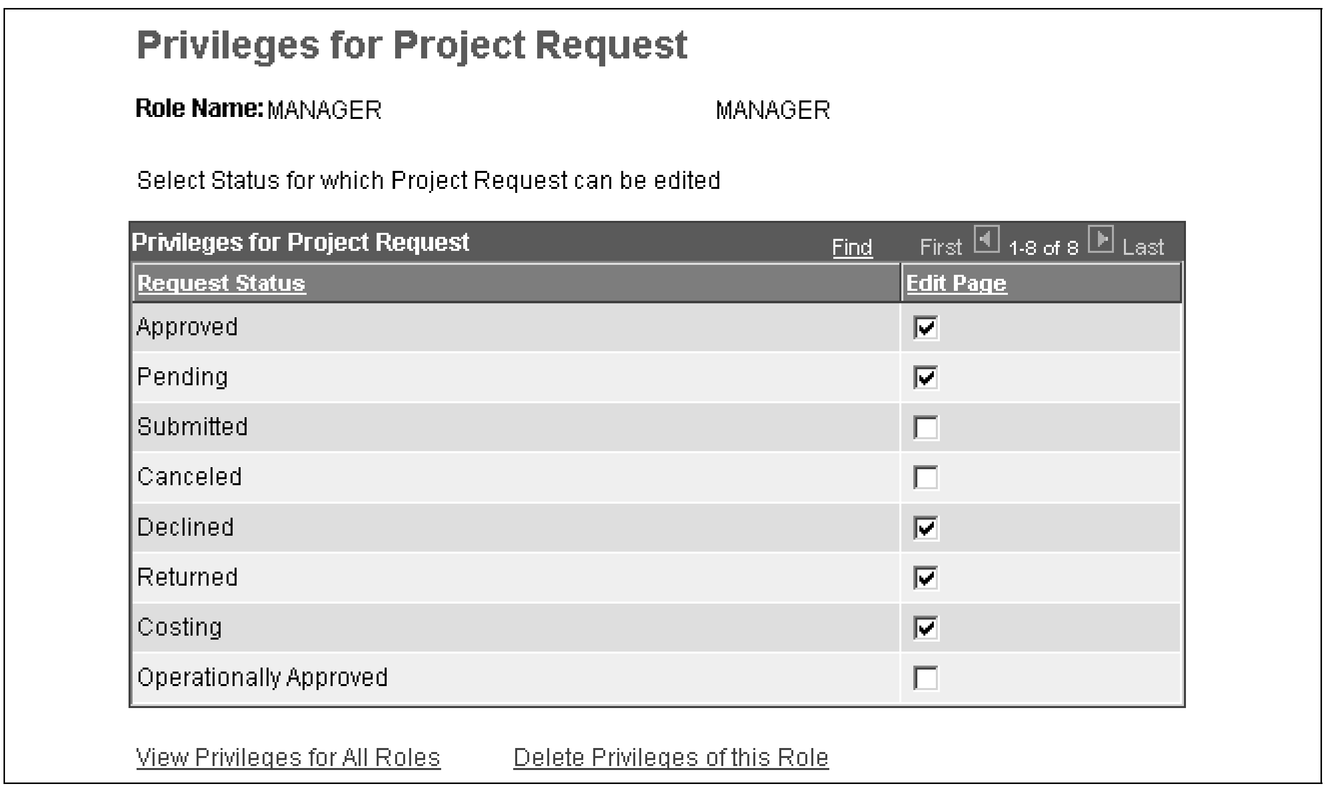
Priority	Description
1	Very High
2	High
3	Medium
4	Low
5	Very Low

Setup - Priority Description page

Five priority levels and their corresponding descriptions are delivered in PeopleSoft Program Management, but you can modify the descriptions to suit your implementation. These descriptions are the valid priorities that appear in the drop-down list for the Priority field on the Project Request page.

Defining Project Request Edit Privileges

Access the Privileges for Project Request page.



Privileges for Project Request

Role Name: MANAGER MANAGER

Select Status for which Project Request can be edited

Privileges for Project Request — Find — First 1-8 of 8 Last

Request Status	Edit Page
Approved	☑
Pending	☑
Submitted	☐
Canceled	☐
Declined	☑
Returned	☑
Costing	☑
Operationally Approved	☐

View Privileges for All Roles Delete Privileges of this Role

Privileges for Project Request page

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

Note. Use the demo data that is delivered with your PeopleSoft Program Management application 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 your implementation are: project requester, project owner, project manager, and manager.

View Privileges for All Roles Click to view a list of roles with defined privileges.

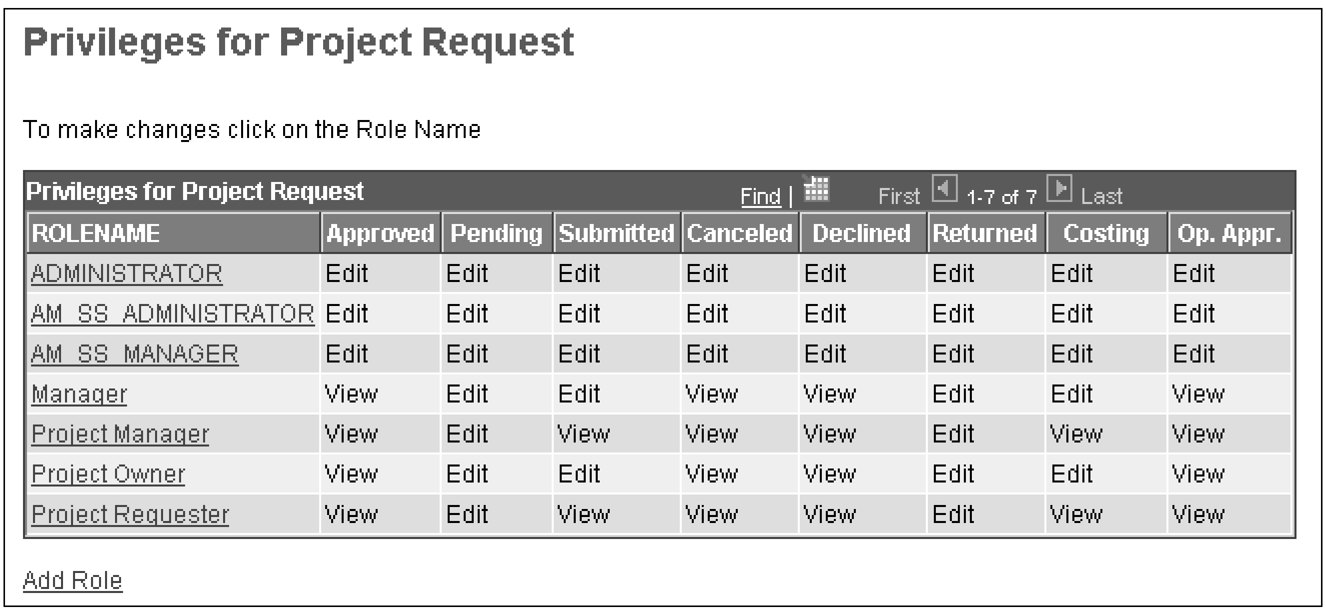
Delete Privileges of this Role Click to delete this role's edit privileges.

See Also

Chapter 5, "Establishing Project Requests," page 43

Viewing Edit Privileges

Access the Privileges for Project Request - Role Selection page.



Privileges for Project Request

To make changes click on the Role Name

Privileges for Project Request — Find | First 1-7 of 7 Last

ROLENAME	Approved	Pending	Submitted	Canceled	Declined	Returned	Costing	Op. Appr.
ADMINISTRATOR	Edit	Edit	Edit	Edit	Edit	Edit	Edit	Edit
AM_SS_ADMINISTRATOR	Edit	Edit	Edit	Edit	Edit	Edit	Edit	Edit
AM_SS_MANAGER	Edit	Edit	Edit	Edit	Edit	Edit	Edit	Edit
Manager	View	Edit	Edit	View	View	Edit	Edit	View
Project Manager	View	Edit	View	View	View	Edit	View	View
Project Owner	View	Edit	Edit	View	View	Edit	Edit	View
Project Requester	View	Edit	View	View	View	Edit	View	View

Add Role

Privileges for Project Request - Role Selection page

This page displays currently defined roles and their edit privileges, based on the project request status value. Users can add a role or modify an existing privilege definition.

Note. Use PeopleSoft security for limiting access to this page to the appropriate users within the organization.

Add Role Click to add a role and define its edit privileges. These roles must already exist and are created using PeopleSoft security.

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

Establishing Program Management Options

This section discusses how to:

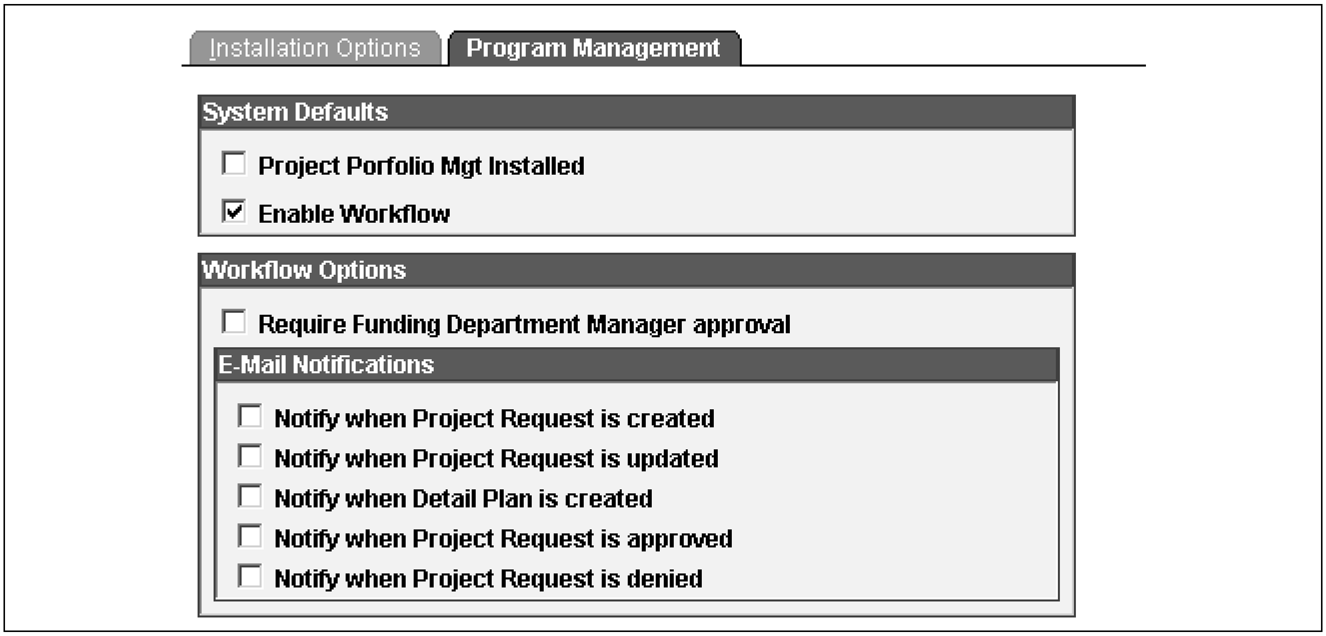
- Define installation options.
- Define business unit options.
- Defining program and project defaults.
- Define activity options.

Pages Used to Define Program Management Options

Page Name	Object Name	Navigation	Usage
Program Management	INSTALLATION_PGM	Set Up Financials/Supply Chain, Install, Installation Options, Program Management	Establish application-level integration behavior settings and project request workflow options.
Program Management Options	PGM_PROG_MGMT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options	Specify program management options, designate the enterprise program tree, and establish various default settings for specific business units.
Program Management Defaults	PROJECT_GEN_02	Program Management, Project Definitions, General Information, Program Management Defaults	Set up defaults for scheduling, health criteria, and forecasting for programs and projects. You can override these defaults for individual projects, resources, or activities, if desired.
Definition	PROJECT_ACTIVITY	Program Management, Activity Definitions, General Information, Definition	Set up change control and scheduling for an activity.

Defining Installation Options

Access the Program Management page.



Program Management page

System Defaults

Project Porfolio Mgt Installed (Project Portfolio Management Installed)

Select this option if you have installed PeopleSoft Project Portfolio Management.

If you select this option, the system disables the remaining fields on this page, because this selection indicates that project request functionality and its associated workflow are enabled in PeopleSoft Project Portfolio Management, instead of PeopleSoft Program Management. As a result, all project request processing occurs in the PeopleSoft Project Portfolio Management application. You should also use PeopleTools Security to remove user access to all of the project request components in the FSCM database; clear all options that grant user access to the components in the DEFINE_SCORECARDS menu in your PeopleSoft FSCM database where the PeopleSoft Program Management application resides.

The reason for deactivating PeopleSoft Program Management's project request functionality if you have installed PeopleSoft Project Portfolio Management is that you will have the same project request management pages as well as additional analytical capabilities available to your users in PeopleSoft Project Portfolio Management, and deactivating the PeopleSoft Program Management versions of the pages will eliminate confusion for your users and provide a consistent user experience.

Enable Workflow

Select this option to enable the PeopleSoft Program Management worfklow functionality. This workflow sends submitted project requests to the worklist of the person designated as the owner and approver on the project request based on the initiative type 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. This option is unavailable if the

Project Porfolio Mgt Installed check box is selected. Complete the Workflow Options region to activate additional workflow options.

Workflow Options

These options are active only when the Enable Workflow option 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 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 will change its status to *Approved* and activate its corresponding program or project.

Note. If your organization intends to require funding department manager approval, every department needs to have a manager identified.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, "Defining and Using ChartFields," Adding Department Values.

E-mail Notifications

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

Notify when Project Request is created: Select this option 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 this option 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 this option 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 to update the project request's cost estimate.

Notify when Project Request is approved: Select this option 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 this option 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.

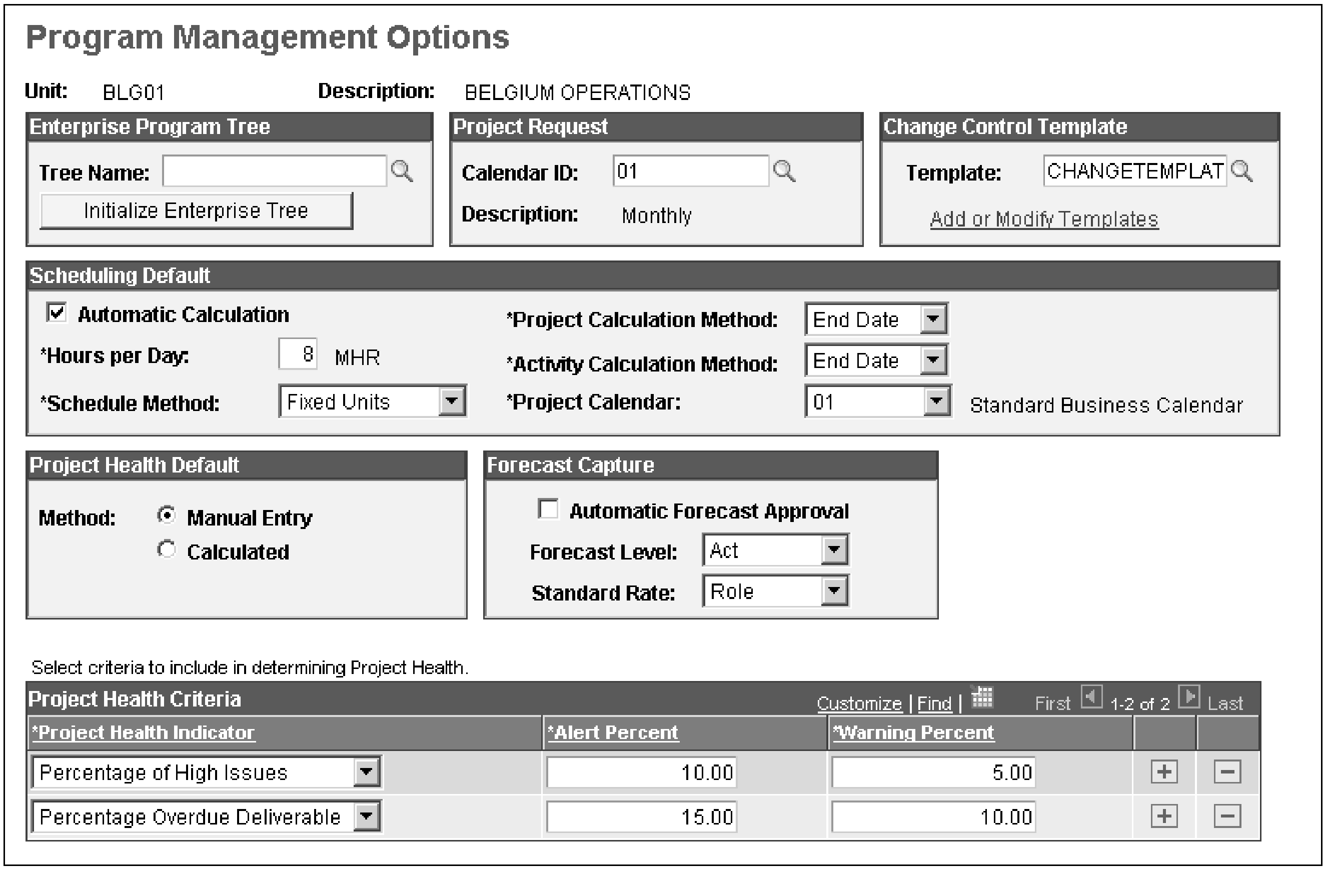
See Also

Chapter 5, “Establishing Project Requests,” Project Request Approval Workflow, page 44

Appendix B, “Delivered Workflows for PeopleSoft Program Management,” page 133

Defining Business Unit Options

Access the Program Management Options page.



Program Management Options page

Enterprise Program Tree

Tree Name	Select an enterprise tree or enter the name of a new tree and click the Initialize Enterprise Tree button. This is the enterprise tree that is associated with the selected business unit. The system uses this tree to establish the relationships among all programs and projects within the business unit.

Note. You do not need to create and maintain enterprise program trees if your organization does not need to create a hierarchy of programs and detail projects for analysis and organization purposes. However, if you want to take full advantage of PeopleSoft Program Management's ability to create programs as umbrellas for detailed projects and other programs for the purposes of management, reporting, and analysis, then it is necessary to maintain in the tree at least the programs and projects that you want to be able to analyze. While not required, it is recommended that you enter and maintain all projects and programs in an enterprise program tree for maximum control, organizational clarity, and reporting sophistication with respect to your projects and programs.

Initialize Enterprise Tree

Click this button to create a new enterprise program tree for the business unit. The name of the new tree must be entered in the Tree Name field before the tree can be initialized.

Project Request

Calendar ID

Select the calendar used for project requests within the selected business unit. This calendar determines the periods and years into which users can enter project request costs and benefits. The calendar specified should contain entries for years as far into the future as you anticipate your users will be forecasting benefits and returns on any given request. For instance, if your organization intends to use project requests to approve capital requests for large-scale assets, such as land and buildings, you will likely need 30 or more future years' worth of entries setup in the calendar you select to use.

Note. PeopleSoft strongly discourages the use of daily detail calendars for project requests because such calendars will result in many rows of data. Instead it is recommended that you use monthly calendars (preferred), or if you need more details for budgeting purposes, weekly calendars.

Change Control Template

Template

Select a template that defines the default change control settings for projects and activities created within the selected business unit.

Add or Modify Templates

Click this link to access the Change Control Template page, where you can specify settings at these levels: project, activity, transaction, and resource.

See Chapter 9, "Tracking Project Changes," page 111.

Scheduling Default

Automatic Calculation

Select this option to have the system automatically calculate project and activity schedules based on the other scheduling parameters that are specified for the business unit.

Hours per Day

Enter the number of hours that define a work day for this business unit.

Schedule Method

This field designates the default method for calculating schedules in the business unit. The scheduling method determines what element of a project schedule remains constant when one of the three scheduling variables (work, duration, or units) changes.

Select one of these scheduling methods:

- *Fixed Duration*: when a schedule is calculated or recalculated, the variable that remains constant is the total amount of time in which assigned labor resources must complete an activity.
- *Fixed Units*: when a schedule is calculated or recalculated, the variable that remains constant is the number of labor resource units assigned to an activity.
- *Fixed Work*: when a schedule is calculated or recalculated, the variable that remains constant is the total amount of work, measured in hours or days, that assigned labor resources require to complete an activity.

Project Calculation Method and **Activity Calculation Method**

These fields designate the default method for calculating schedules at the project and activity levels. Select one of these methods:

- *Duration*: The duration of is determined from the start date and end date entered for the project or activity.
- *End Date*: The end date of the schedule is determined based upon the start date and the duration entered for the project or activity.
- *Start Date*: The start date of the schedule is calculated based on the duration and end date entered for the project or activity.

Project Calendar

Select a default calendar that is used for calculating schedules at the project and activity levels. The system uses this calendar to determine business holidays and non-work days and factor them into the calculation of start dates, end dates, and durations.

Health Criteria Default

Method

This field specifies the default method of calculating project health for all projects generated in the project business unit. Select from these options:

- Manual Entry: a project team member enters health criteria into the system.
- Calculated: the health value is calculated by the system based on parameters that are defined by the user.

Forecast Capture

Automatic Forecast Approval

Select this option to indicate that project managers do not have to approve forecasts in order to make them accessible to PeopleSoft Program Management for the purposes of time, cost, and revenue forecasts. Clear the option to indicate that approval is required on the forecast review page before forecasts can be used.

Note. Forecast data is available for utilization calculations, with or without approval.

Forecast Level

Select *Prj* (project) or *Act* (activity) to indicate the default level at which forecasting occurs in this business unit for each project.

Warning! If forecasting occurs at the *Prj*, or project level, the activity is not required when entering a forecast. This affects the ability to report forecasts at the activity level. Only choose *Prj* if you do not need activity level time, cost, and revenue forecasts.

Standard Rate

Project estimates are based on the cost and bill rates that are associated with a *Job Code*, *Resource*, or *Role*. The value you select determines where the system obtains standard cost rates and bill rates when generating estimates.

Project Health Criteria

Project Health Indicator

Select one or more default indicators that are used to measure how well a project is doing in this business unit. If more than one indicator is selected, the criteria returning the *worst* status determines the status that is displayed in the Health field on the Manager Workbench page.

The indicator options are:

- *blank (none selected)*: the Health indicator field on the Manager Workbench page will not appear for any project belonging to the specified business unit.
- *Cost to Budget Variance*: percentage difference between the project's actual and budgeted costs calculated as *((Actual Cost − Budgeted Amount) ÷ Budgeted Amount)* × 100.
- *Overdue % Complete*: completion percentage for activities that have not met their deadlines.
- *Percentage Overdue Deliverable*: percentage of the project's deliverables that have not met their deadlines for the selected activity on the Manager Workbench. This indicator is calculated as *(Number of Overdue Deliverables ÷ Total of All Deliverables)* × 100.
- *Percentage of High Issues*: percentage of issues that are of high priority for the selected activity on the Manager Workbench page. This indicator is calculated as *(Number of High Issues ÷ Total of All Issues)* × 100.

Alert Percent

Enter a numerical value that triggers an alert status (displayed as a red symbol) for the corresponding project health indicator. With the exception of *Overdue % Complete*, all project health indicators with calculated percent values higher than the alert percent trigger a red alert status on the Manager Workbench page. For *Overdue % Complete*, a percent value less than the alert percentage triggers a red alert status on the Manager Workbench page.

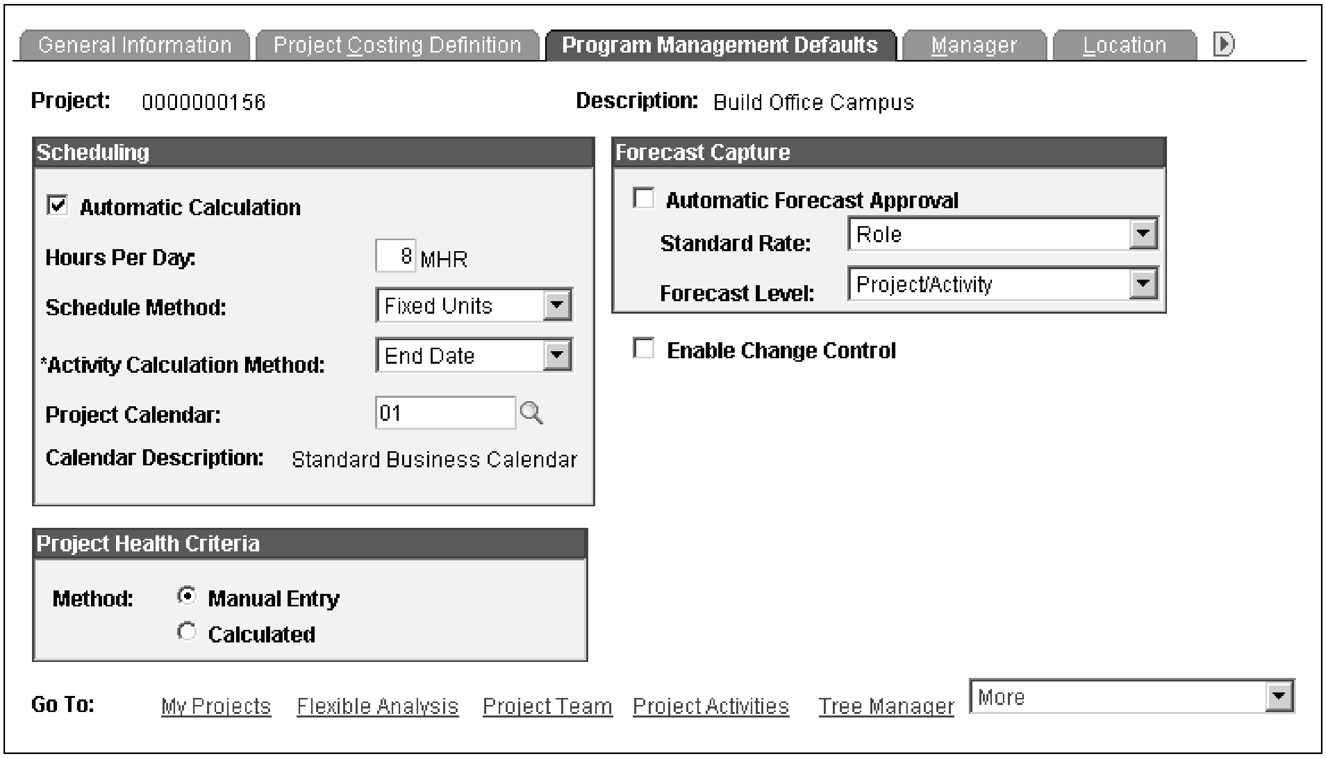
Warning Percent

Enter a numerical value that triggers a warning status (displayed as a yellow symbol) for the corresponding Project Health Indicator. With the exception of

Overdue % Complete, all Project Health Indicators with calculated percent values higher than the warning percent, but less than the alert percent, trigger a yellow warning status on the Manager Workbench page. For *Overdue % Complete*, a percent value less than the warning percentage, but greater than the alert percent, triggers a yellow warning status on the Manager Workbench page.

Defining Program and Project Defaults

Access the Program Management Defaults page.



Program Management Defaults page

This page establishes defaults specifically relevant to the management aspect of programs and projects. The values you enter on this page override the program management option settings for these fields that were established at the business unit level.

Scheduling

The fields in this group perform identically to the corresponding fields that are defined for the business unit.

Health Criteria Default

The fields in this group perform identically to the corresponding fields that are defined for the business unit.

Forecast Capture

The fields in this group perform identically to the corresponding fields that are defined for the business unit.

Change Control

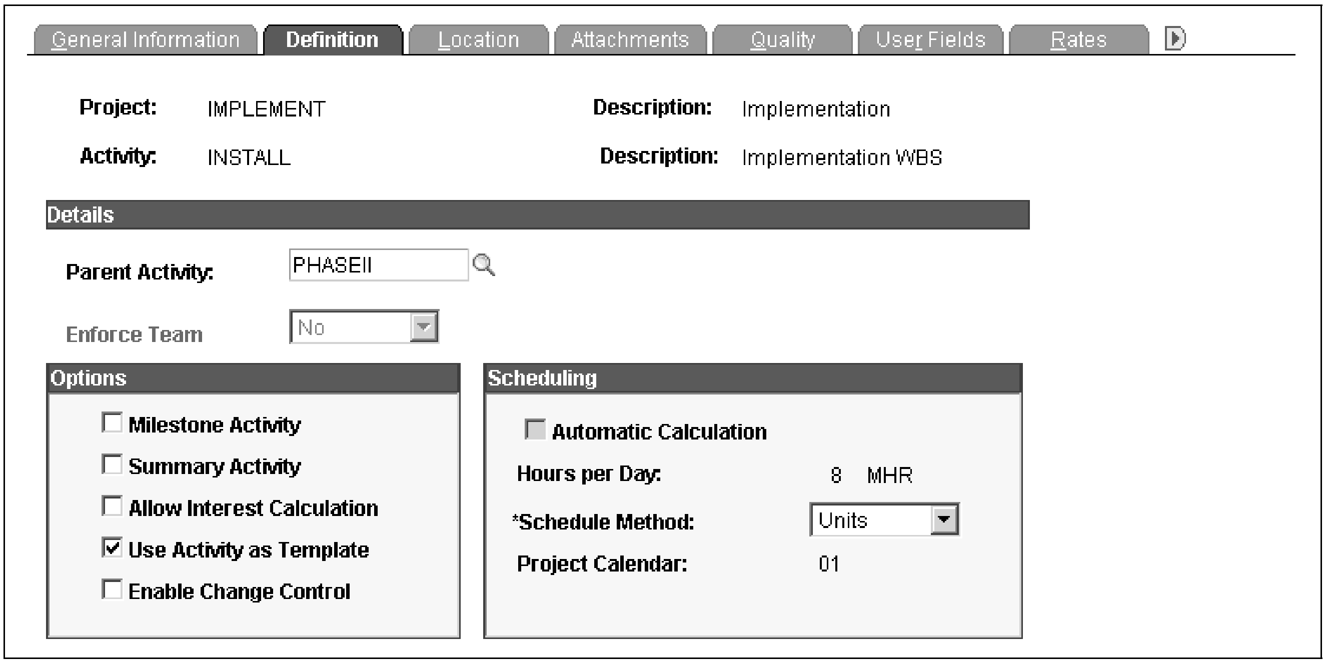
Enable Change Control Select this option to enable the project to use change control functionality. If change control is enabled at the business unit level, this project uses the change control template that is defined for the business unit.

See Also

Chapter 3, "Setting Up PeopleSoft Program Management," Defining Business Unit Options, page 20

Defining Activity Options

Access the activity Definition page.



Definition page

PeopleSoft Program Management default options are set up at the business unit level. This page enables you to override business unit default settings at the activity level on individual projects.

Options

Enable Change Control Select this option to enable the activity to use change control functionality. If change control is enabled at the business unit and project levels, this activity uses the change control template that is defined for the business unit.

The remaining fields in this group behave the same as they are described in the PeopleSoft Project Costing PeopleBook.

See *PeopleSoft Project Costing 8.8 PeopleBook,* "Creating and Maintaining Activities," Defining Activities.

Scheduling

The fields in this group are documented at the business unit level.

See Chapter 3, "Setting Up PeopleSoft Program Management," Defining Business Unit Options, page 20.

CHAPTER 4

Managing Programs

This chapter provides an overview of programs and projects and discusses how to:

- Establish and maintain programs.
- Establish and maintain enterprise program trees.
- Review programs and projects.
- Refresh program data.

See Also

Chapter 5, "Establishing Project Requests," page 43

Chapter 3, "Setting Up PeopleSoft Program Management," Defining Business Unit Options, page 20

PeopleSoft Project Costing 8.8 PeopleBook, "Creating and Maintaining Projects"

PeopleSoft Project Costing 8.8 PeopleBook, "Creating and Maintaining Activities"

Understanding Programs, Projects, and the Enterprise Program Tree

Programs are initiatives that are composed of one or more projects. Usually there is a theme associated with a program, and all the projects within the program support that theme. In PeopleSoft Program Management, an enterprise program tree defines the hierarchical relationship of a project business unit's programs and their associated projects. This tree is required to define a program. To establish a program, use the Project - General Information page, and select the Program checkbox to indicate you are defining a program, not a project.

You define the enterprise program tree for a business unit by using the Program Management Options page.

A project is a temporary endeavor undertaken to create a unique product, service, or result. Projects can be established using one of these methods:

- Automatically by the system when a submitted project request is approved.

  Project requests are created in either PeopleSoft Project Portfolio Management or PeopleSoft Program Management.

- Automatically by the system when a submitted project request is changed to a status of *Costing*.

  When project requests created in either PeopleSoft Project Portfolio Management or PeopleSoft Program Management are set to a status of *Costing*, the system automatically creates a project in a processing status of *Pending*.

- By a project manager or similarly designated person.

  Projects are created using the Project Definition component in PeopleSoft Project Costing and PeopleSoft Program Management.

- By the project copy feature, which copies an existing project into another project.

  The copy feature is part of PeopleSoft Project Costing.

- By PeopleSoft Resource Management.

  In PeopleSoft Resource Management, a service order can generate a project for the purpose of staffing resources to it.

- By importing project data from Microsoft Project.

  Projects are imported from Microsoft Project using the Create Project From Microsoft page in PeopleSoft Project Costing.

To associate projects with a program, you add the projects to the enterprise program tree by using the Enterprise Program Tree page; you can also use PeopleSoft Tree Manager to maintain it.

The data for all projects within a program are summarized at the program level, enabling program managers to quickly and easily assess how well a program is progressing. The Program Refresh process (PGM_PROGRFSH) updates program data.

Establishing and Maintaining Programs

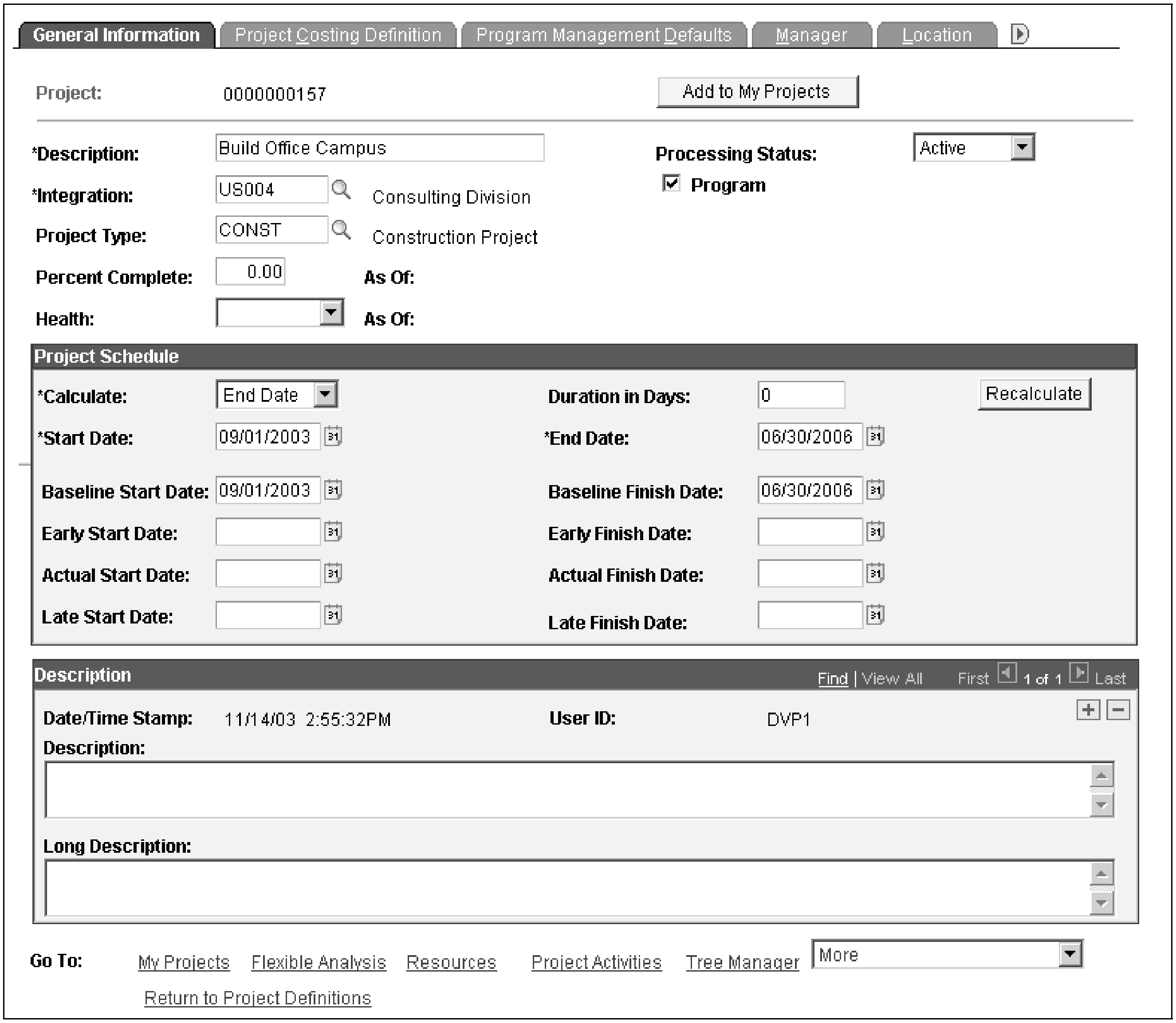
This section discusses how to establish and maintain programs and projects.

Page Used to Establish and Maintain Programs

Page Name	Object Name	Navigation	Usage
General Information	PROJECT_GEN_01A	Program Management, Project Definitions, General Information, General Information	Establish and maintain programs and projects.
Program Management Defaults	PROJECT_GEN_02	Program Management, Project Definitions, General Information, Program Management Defaults	Set up defaults for scheduling, health criteria, and forecasting for a program. You can override these defaults at the project, resource, or activity level, if desired.

Establishing Programs

Access the General Information page.



General Information page

Calculate

The value of this field defaults from the Program Management Options page, and determines which one of the following three elements is calculated based upon the values entered for the other two fields on the page: Start Date, End Date, or Duration in Days. This field is available only when PeopleSoft Program Management is installed.

Duration in Days

The number of business days between the start date and end date of the project or program. This field is available only when PeopleSoft Program Management is installed.

Program

Select this option to indicate you are establishing a program. When this option is selected, the system prevents you from adding activities to the program, because only projects can have activities. If you try to select this option for a project that already has activities, you will receive a message indicating that the project cannot be changed to a program because it has activities associated with it; either remove the activities from the existing project or create a new program.

Once you convert a project to a program by selecting this check box and saving your changes, the project ID of this program becomes available in the various program and parent project ID prompt list fields that appear on pages throughout the PeopleSoft Program Management application.

Recalculate Click this button to force the system to recalculate the project or program start date, end date, or duration, depending on this page's Calculate field value. This field is available only when PeopleSoft Program Management is installed.

The remaining fields on this page are described in the PeopleSoft Project Costing PeopleBook.

See *PeopleSoft Project Costing 8.8 PeopleBook*, "Creating and Maintaining Projects," Creating and Updating Projects.

Defining Program Defaults

Access the Program Management Defaults page to configure how a specific project or program will behave with respect to forecasting, managing change control, scheduling, and evaluating project health.

See Chapter 3, "Setting Up PeopleSoft Program Management," Defining Program and Project Defaults, page 24.

Establishing and Maintaining Enterprise Program Trees

This section discusses how to:

- Establish an enterprise program tree.
- Maintain enterprise program trees.

Pages Used to Establish and Maintain Enterprise Program Trees

Page Name	Object Name	Navigation	Usage
Program Management Options	PGM_PROG_MGMT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options	Specify program management options, designate the enterprise program tree, and establish various default settings for specific business units.
Enterprise Program Tree	PGM_ASSIGN_TO_EPT	Program Management, Program Tools, Enterprise Program Tree	Assign a project or program to the enterprise program tree associated with its respective project business unit.
View Enterprise Program Tree	PGM_VIEW_EPT	Program Management, Program Tools, Review Program, View Enterprise Program Tree	View a display-only version of the enterprise program tree to visually identify where a project or program appears in the enterprise's hierarchy.

Establishing an Enterprise Program Tree

Access the Program Management Options page and complete these steps:

1. In the Tree Name field, enter the name of the new tree.
2. Click the Initialize Enterprise Tree button.

   The system will create a tree keyed by business unit at this point.
3. Add programs and projects to the tree by using the Enterprise Program Tree page.

Alternatively, you can use PeopleSoft Tree Manager to create the tree first, and then select that tree in the Tree Name field, instead of entering a new tree name.

Tree Structure Requirements

You must use the delivered PROJECT_BU structure for your enterprise program trees.

Tree Definition Requirements

The key field values required on the Tree Definition page for enterprise program trees are:

Status	*Active*
Tree Structure	*PROJECT_BU*
Category	*PROJECT*
Use of Levels	*Strictly Enforced*
Allow Duplicate Detail Values	Do not select this check box.

All Detail Values in this Tree Do not select this check box.

Performance Methods Accept the defaults for all options.

See Also

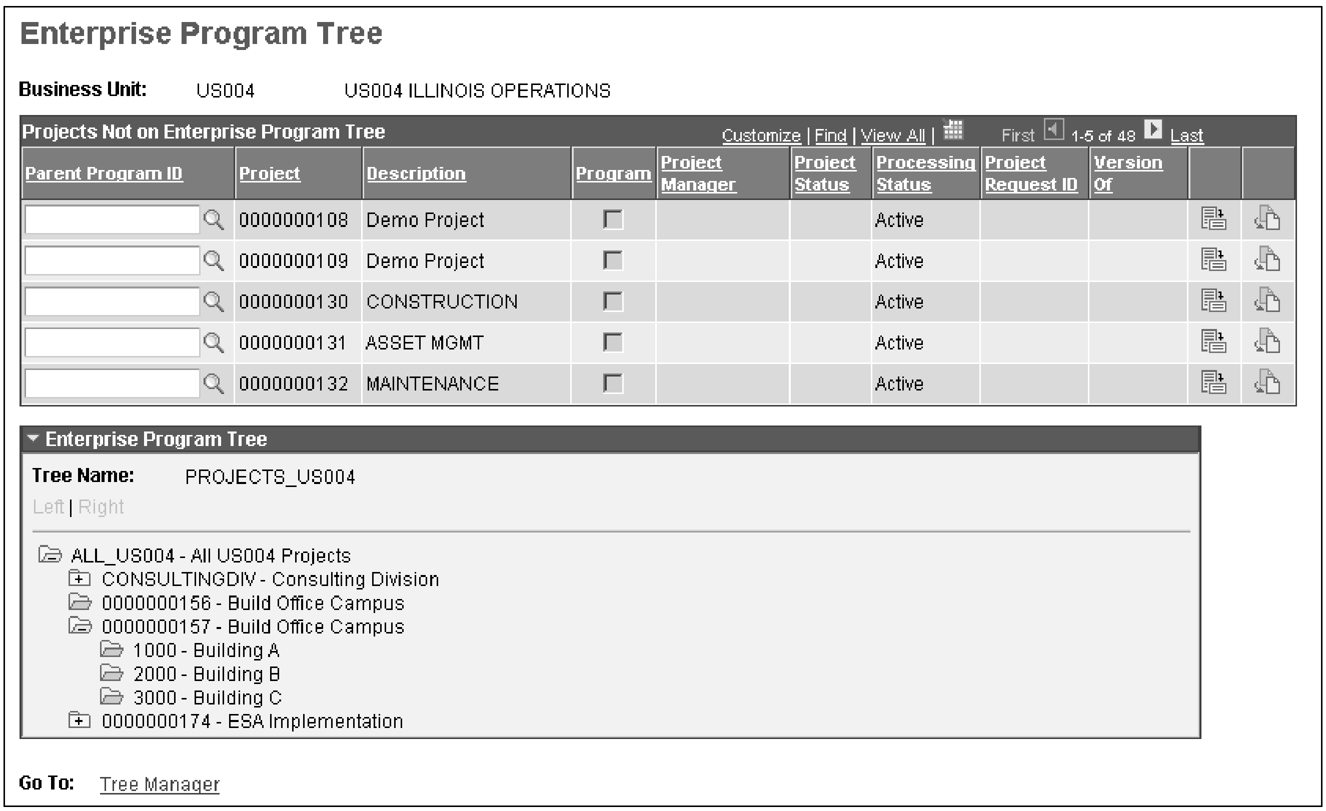
Chapter 3, “Setting Up PeopleSoft Program Management,” Establishing Program Management Options, page 17

Chapter 4, “Managing Programs,” Maintaining the Enterprise Program Tree, page 32

Chapter 4, “Managing Programs,” Viewing the Enterprise Program Tree, page 36

Maintaining the Enterprise Program Tree

Access the Enterprise Program Tree page.



Enterprise Program Tree page

Parent Program ID To make a project or a program a child of a program, select the identifier of an existing program.

Click this button to access the project General Information component (PROJECT_GENERAL) and view or update details of the project or program.

Click this button to access the Project Request component (BC_PROJ_REQUEST). This option is valid only if the project or program is linked to a project request.

Tree Manager Click the Tree Manager link to access the Tree Manager page, where you can edit the tree.

Reviewing Programs and Projects

This section discusses how to:

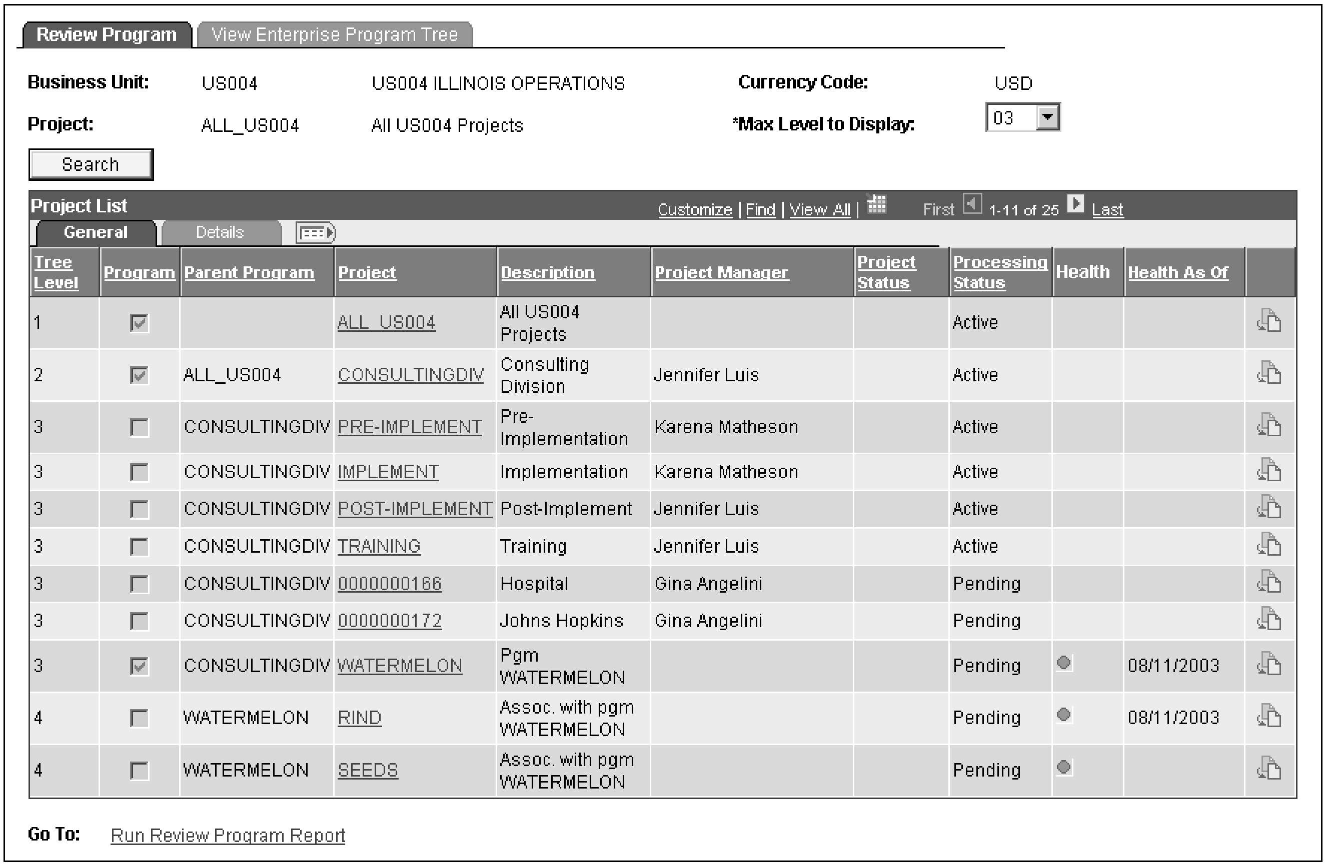
- Review programs and projects.
- Review the enterprise program tree.
- Review project health by work breakdown structure.
- Generate the Review Program report.

Pages Used to Review Programs and Projects

Page Name	Object Name	Navigation	Usage
Review Program	PGM_REVIEW_PROG	Program Management, Program Tools, Review Program	Displays a list of programs and projects for a business unit and enables drilling down to each program and project.
View Enterprise Program Tree	PGM_VIEW_EPT	Program Management, Program Tools, Review Program, View Enterprise Program Tree	View a display-only version of the enterprise program tree for reference purposes.
Review Program Report	RUN_PGM1000	Click the Run Review Program Report link on the Review Program page.	Specify run control parameters to create report PGM1000.
Manager Workbench	PC_MGR_WORKBENCH	Program Management, Project Management, Manager Workbench	View a summary of a project's work breakdown structure (WBS), health scorecard, issues, and deliverables.

Reviewing Programs and Projects

Access the Review Program page.



Tree Level	Program	Parent Program	Project	Description	Project Manager	Project Status	Processing Status	Health	Health As Of	
1	☑		ALL_US004	All US004 Projects			Active			
2	☑	ALL_US004	CONSULTINGDIV	Consulting Division	Jennifer Luis		Active			
3	☐	CONSULTINGDIV	PRE-IMPLEMENT	Pre-Implementation	Karena Matheson		Active			
3	☐	CONSULTINGDIV	IMPLEMENT	Implementation	Karena Matheson		Active			
3	☐	CONSULTINGDIV	POST-IMPLEMENT	Post-Implement	Jennifer Luis		Active			
3	☐	CONSULTINGDIV	TRAINING	Training	Jennifer Luis		Active			
3	☐	CONSULTINGDIV	0000000166	Hospital	Gina Angelini		Pending			
3	☐	CONSULTINGDIV	0000000172	Johns Hopkins	Gina Angelini		Pending			
3	☑	CONSULTINGDIV	WATERMELON	Pgm WATERMELON			Pending	●	08/11/2003	
4	☐	WATERMELON	RIND	Assoc. with pgm WATERMELON			Pending	●	08/11/2003	
4	☐	WATERMELON	SEEDS	Assoc. with pgm WATERMELON			Pending	●		

Go To: Run Review Program Report

Review Program page

Max Level to Display — This indicates the maximum number of program levels to display for review. Options are *01*, *02*, or *03* levels down from the selected program.

Search — Click this button to display a list of programs and projects. The size of the list depends on the number of levels specified in the Max Level to Display field.

Project List - General

Tree Level — Indicates the level that this project or program occupies on the enterprise program tree.

Program — If this column is selected, indicates that the project is also a program.

Parent Program — Lists the name of the program at the next higher level in the enterprise program tree.

Project — The project ID of the program or project. The project IDs are links; click a project ID to access the project General Information page of the PROJECT_GENERAL component, where you can view or update details of the program or project.

Health — Lists the health rating for the project.

Health as of — Lists the date the health was last updated.

Click this button to access the Project Request component. This option is valid only if the project or program is linked to a project request.

Note. If you click the Link to Project Request button for a project that appears under a program, and because of its relationship to a program that project is associated with a project request, when the system transfers to the Project Request component, it displays the program project ID. In other words, if a project was not directly generated from a project request, the system checks whether the project has a parent program with an associated project request. If a project request is found for the parent program, the system transfers you to that project request.

Project List - Details

This view displays fields that pertain to various elements of the program or project—actual and budget cost data, percentage completion, start and end dates, issues, and deliverables.

Planned Cost Budget

Lists the cost budget for projects in *Pending* processing status. The budget data is selected from the PC_BUD_SUMMARY table. The budget data that appears is data that has not yet been finalized. This column is not summarized at the program level.

Click an amount to access the Budget Detail page, where you can review the details for the budget amount.

Cost Budget

Lists the finalized cost budget for projects in *Active* or *Inactive* processing status. The budget data is selected from the PC_ACTIVITY_SUM table. This column is summarized at the program level.

Click an amount to access the Budget Detail page, where you can review the details for the budget amount.

Cost Actuals

Lists the project's actual cost. This data is selected from the PC_ACTIVITY_SUM table. This column is summarized at the program level.

% Complete (Percent Complete)

The project percent complete.

Start Date and **End Date**

Lists the start and end dates for the project.

Total Issues

Lists how many unresolved issues there are for the project. (Unresolved issues are issues where the resolution date is blank.)

Click the amount to access the Issues search dialog page where you can review project issues.

Critical Issues

Lists how many critical unresolved issues there are for the project.

Click the amount to access the Issues search dialog page where you can review project issues.

% Critical (Percent Critical)

Lists the percentage of project issues that are critical.

Total Deliverables

Lists the total number of deliverables for the project.

Overdue Deliverables	Lists the number of project deliverables that are late.
% Overdue (Percent Overdue)	Lists the percentage of deliverables that are late.

Go To

Run Review Program Report	Click this link to access the Review Program Report page where you can enter parameters for report PGM1000.

See Also

PeopleSoft Project Costing 8.8 PeopleBook, “Budgeting Project Costs and Planning Revenue”

Generating the Review Program Report

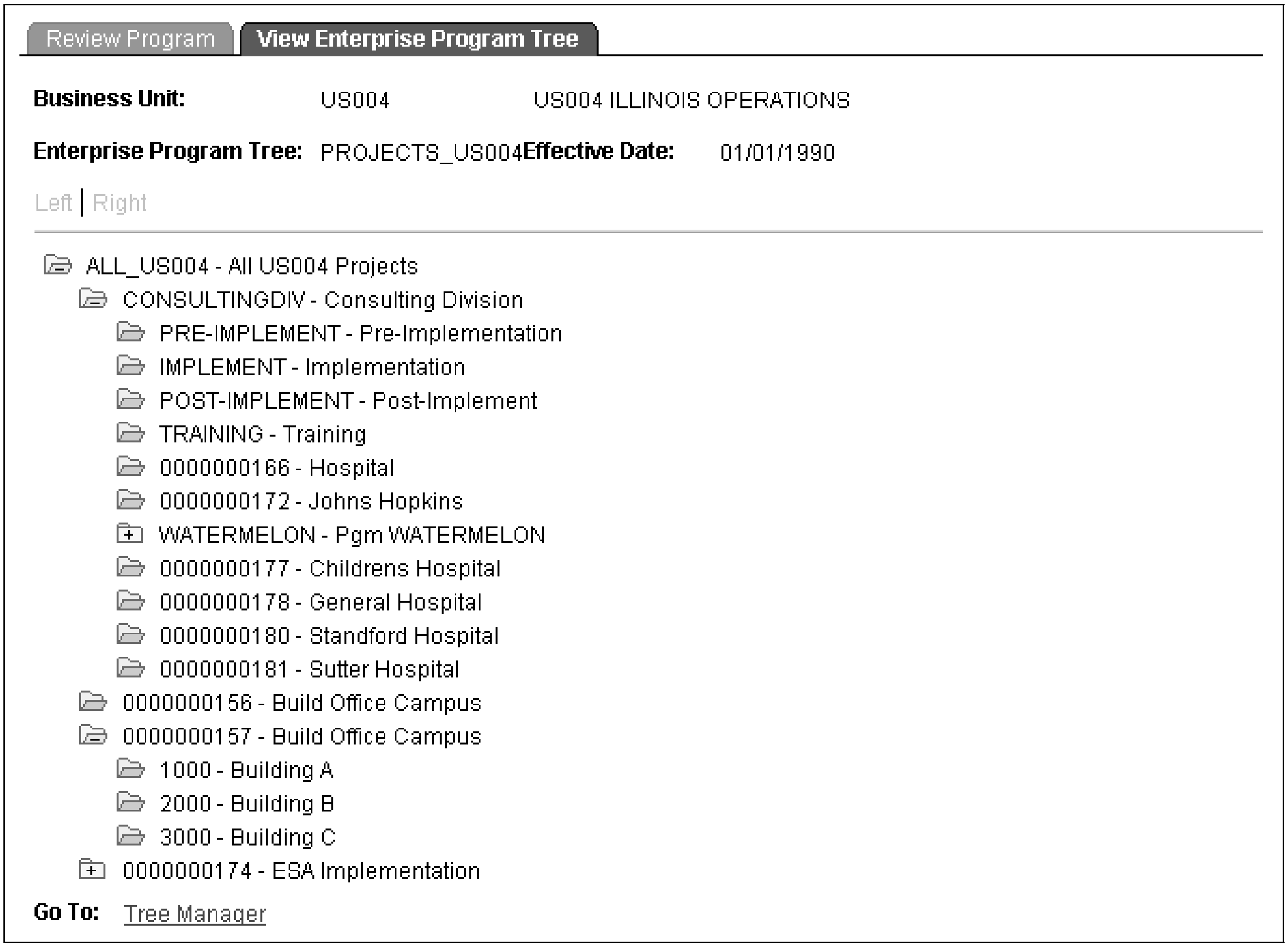
Access the Review Program Report page.

Specify the report parameters and click Run to generate the report.

This report assists you in processing inquires that result in more than 50 programs or projects meeting the search criteria on the Review Program page. Because of the amount of processing time that could be required to return calculated information for more than 50 programs or projects, PeopleSoft Program Management delivers the Review Program Report. This report provides the same information as the Review Program page, however, it does so by using the PeopleSoft Process Scheduler to launch an Application Engine process (PGM_REVW_AE) and a Crystal Report (PGM1000).

Viewing the Enterprise Program Tree

Access the View Enterprise Program Tree page.



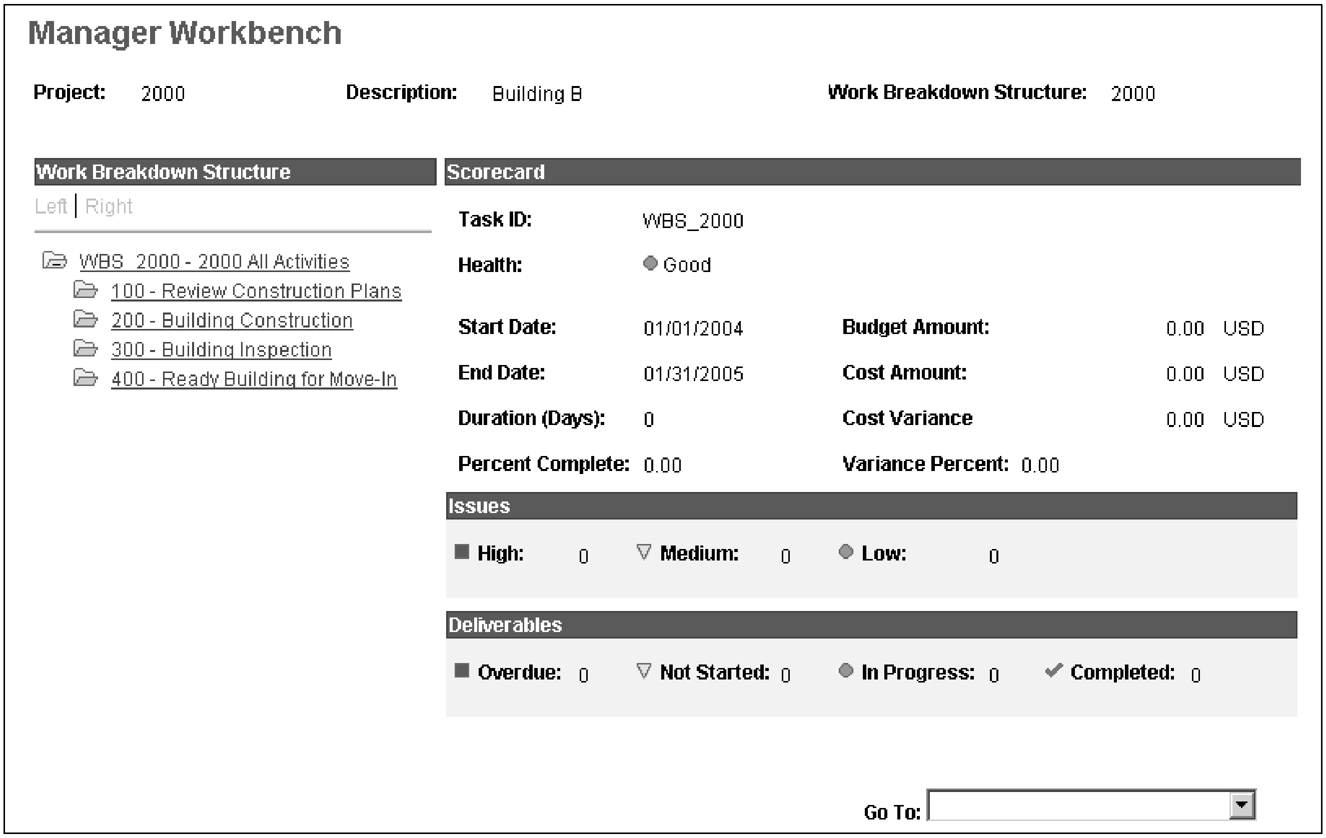
View Enterprise Program Tree page

This page is a display-only view of the enterprise program tree for the selected program.

	Click to expand a folder and view its subordinate programs or projects.
	Click to collapse a folder and all of its subordinate programs or projects.
Tree Manager	Click this link to access the Tree Manager page, where you can edit the tree.

Reviewing Project Health by Work Breakdown Structure

Access the Manager Workbench page.



Manager Workbench page

This page provides a summary of project and activity data from various components in PeopleSoft Program Management and PeopleSoft Project Costing. The Manager Workbench provides project managers with an overview of their projects and enables them to navigate quickly to view details in either application.

Work Breakdown Structure

Use the work breakdown structure (WBS) to expand and display a project's activities. Select an activity or project to view the data for that object in the Scorecard, Issues, and Drill to Deliverables sections of this page.

	Click to expand a folder and view its subordinate projects or activities.
	Click to collapse a folder and all of its subordinate projects or activities.

Scorecard

This section displays data that pertains to the selected project or activity in the WBS tree. Scorecard data is obtained from the project and activity components. The fields included in the scorecard section are:

Task ID and **Description**	The activity and description of the selected node of the WBS tree.
Health	Lists the activity's health ranking and its associated indicator, based on the established health criteria. If no health criteria are established for the business unit, the health fields do not appear.

See Chapter 3, "Setting Up PeopleSoft Program Management," Defining Business Unit Options, page 20.

Start Date and **End Date** — The activity's start and end dates.

Duration — The activity's duration, in days.

Percent Completed — The activity's percent complete.

Budget Amount — Calculated as the sum of all project transactions for the selected activity, where the analysis type is in the project's budget analysis group (AN_GRP_ACTV_BUD).

Cost Amount — Calculated as the sum of all project transactions for the selected activity, where the analysis type is in the project's cost analysis group (AN_GRP_TOT_COSTS).

Cost Variance — Calculated as *(Budget Cost) − (Actual Cost)*

Variance Percent — Calculated as (*(Actual Cost) − (Budget Cost)*) ÷ *(Budget Cost)*) × 100.

Note. Task ID and activity ID are synonymous.

Issues

This section displays data pertaining to the project or activity that is selected from the WBS. Data is obtained from the issue component for the project or activity and indicates the number of issues logged by priority level.

Deliverables

This section displays data pertaining to the project or activity that is selected from the WBS. Data is obtained from the deliverable detail component for the activity and indicates the number of deliverables in each status.

Go To

The Go To selections access other program management functions. Options are:

Change Control Analysis — Select to access the Change Control Analysis page, which enables project managers to view a history of modifications by project.

Deliverables — Select to access the Deliverables Summary page for the activity that is selected from the WBS. This option can be used only for activities.

Flexible Analysis — Select to access the Flexible Analysis interactive report that is described in PeopleSoft Project Costing to analyze project costs based on an analysis template.

Issue Management — Select to access the Issue Management component to add, view, and update project issues.

Maintain Activity — Select to access the Activity Definitions component to view and update the activity selected in the WBS.

Project Budgeting — Select to access the Budget Plan page, where you can view, update, and create a budget plan for the project.

Project General Select to access the project General Information component (PROJECT_GENERAL) where you can view and update the elements of the project in the WBS.

Project Transactions Select to access the Transaction List page for the activity that is selected from the WBS. This option can be used only for activities.

Status Reports Select to access the Review Status Reports page, where you can review project team members' reports and mark them as *Complete*, if appropriate.

Refreshing Program Data

This section provides an overview of the program refresh process and discusses how to run the program refresh processes.

Understanding the Program Refresh Process

The program refresh process (PGM_PROGRFSH) summarizes project data into program data and recalculates:

- Project health.

  Applies to projects with a health criteria method set to *Calculate*. When you run this process, the health as of date is updated with the date and time of processing.

- Start and end dates.

  Updates program dates only; project dates are updated in real time when activity dates are updated.

Page Used to Refresh Programs

Page Name	Object Name	Navigation	Usage
Program Refresh	RUN_PGM_PROG_RFSH	Program Management, Program Tools, Program Refresh	Specify run control parameters to summarize project data into program data.

Running the Program Refresh Process

Access the Program Refresh page.

BU/Proj Option (Business unit/project option) Specify the level of processing. Options are:

Business Unit: Select to process all projects and programs within the business unit.

Business Unit/Proj: Select to run for a specified project or program within the business unit.

Project Specify the project. This field is required when the BU/Proj Option field is set to *Business Unit/Proj*.

Select from Enterprise Program Tree	Click to view the enterprise program tree associated with the business unit, and select the specific program or project to refresh.
Calculate Health	Select this option for the Program Refresh process to recalculate project health. The result is based on health parameters entered at the business unit level for all selected projects with a health method of *Calculate*. **Note.** To use this option, health parameters must already be set up for the selected business unit, or an error message is issued when the Program Refresh process runs.
Roll Up Start/End Dates	Select to update program dates based on the dates of their child projects in the enterprise program tree.

CHAPTER 5

Establishing Project Requests

This chapter provides an overview of project requests, lists common project request elements, and discusses how to:

- Create project requests.
- View project requests.
- Analyze project impact.
- Convert currency.

Understanding Project Requests

This section provides an overview of project requests and discusses:

- Prerequisites.
- Project request versions.
- Project costs and benefits.
- Project request approval workflow.

Project requests are used to define proposed projects so that managers can evaluate how well they support an organization’s strategy, determine if the costs and benefits are acceptable, and ultimately, to decide which projects to undertake.

Prerequisites

Be sure to set up options at the system, business unit, project, and activity levels prior to establishing project requests.

See Chapter 3, “Setting Up PeopleSoft Program Management,” page 9.

Project Request Versions

Multiple versions of a project request can be created so that the versions can be compared and analyzed before a request is approved. For example, the initial version could be “best case” in which estimated benefits are very high, but costs are as well. The second version could be a scaled down version of the project request with less benefit for less cost. Multiple versions can exist until one is approved. At that time, all other remaining versions change to declined status. (Versions that were already declined remain in declined status.) When a version is created, many of its fields are populated by default with the values of the current project request.

Project Costs and Benefits

Estimated project costs and expected benefits are entered by general ledger business unit, department, and account. These amounts are the expected cash inflows and outflows related to the proposed effort.

Project Request 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 identified in the Approver field on the project request page. Only users who are associated with the 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 take place 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 has entered on the project request, the project owner and approver fields populate automatically on the project request.

   The system initially sets the value of the status to *Pending.*

2. The user submits the project 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 link of the project request to review it.

5. The project approval page is displayed. 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 has been 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 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 will still be required, assuming 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 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.

Note. You establish whether funding department manager approval is required at the installation options level.

See Chapter 3, "Setting Up PeopleSoft Program Management," Defining Installation Options, page 17.

Return

Returns the project request to the individual identified as the requester on the project request.

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.

Decline

Denies the project request.

The system updates the project request's status to *Declined*, changes the processing status of any corresponding projects to *Inactive* (if there is an associated project), and changes any resource assignments for the project to a status of *Cancelled.*

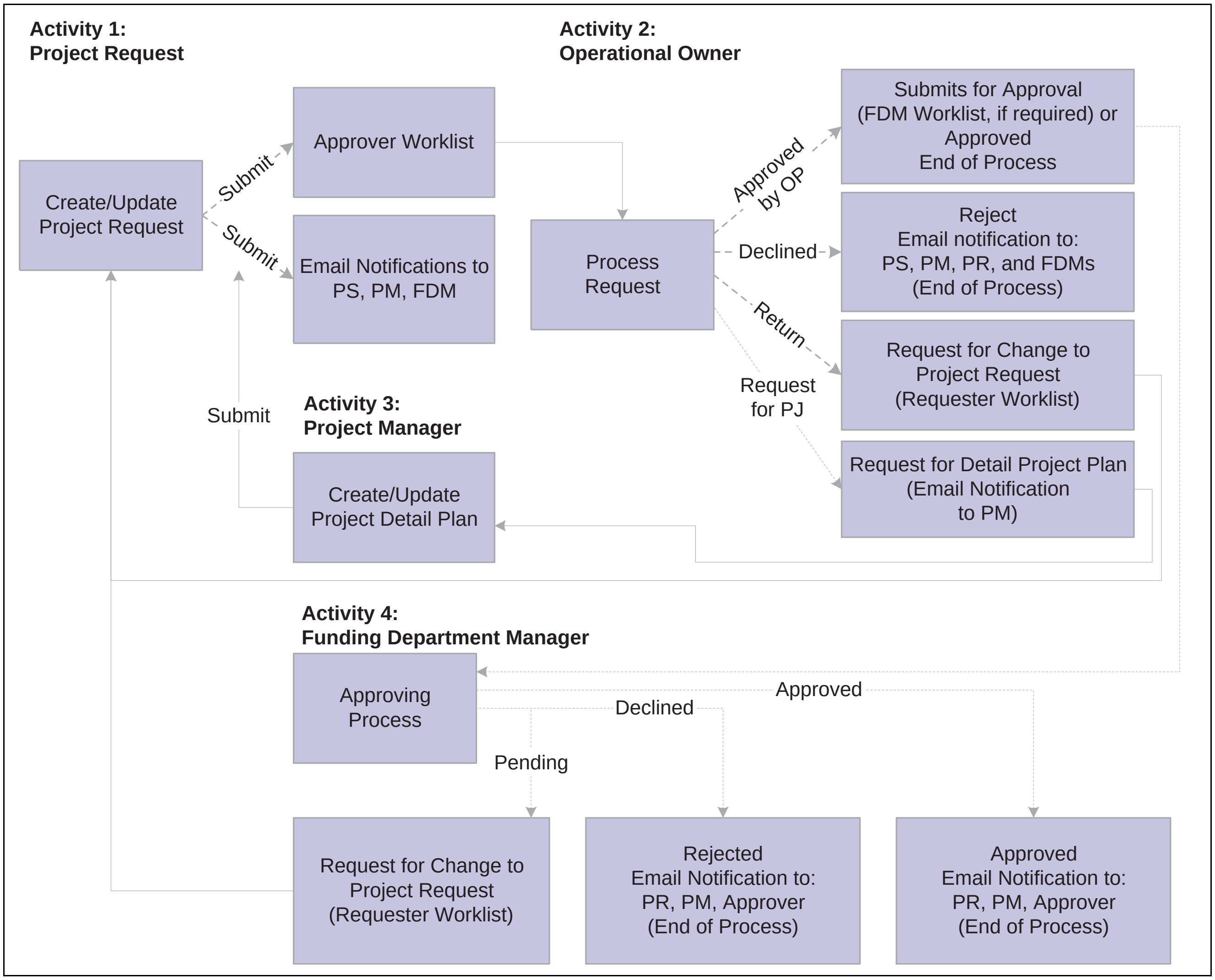
Cost

Indicates detailed cost information is required.

The system routes the project request to the project manager, and updates the project request status to *Costing.*

This signifies that the project manager must create a detailed plan using the various project planning tools in PeopleSoft Program Management. When the plan is complete, the project manager clicks the Send to Project Request button on the Project Request Estimate Summary page. The system subsequently updates the project request status to *Submitted*, triggering a message on the project request to indicate that a detail plan has been created, and routes the project request back to the worklist of the project request's designated approver.

This diagram illustrates the project request approval workflow, and its impact on the project request status:

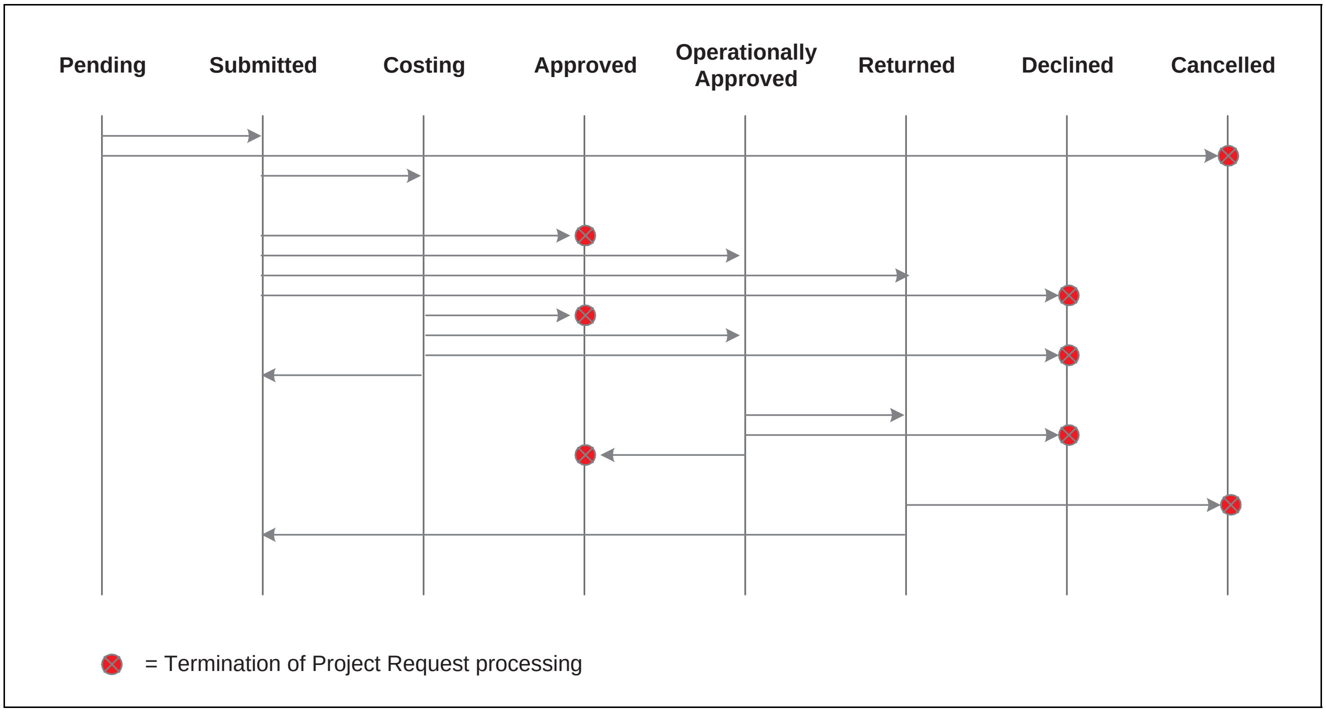


Project request approval workflow

This table provides a key for the abbreviated roles 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 a project request can assume given its current status:



Project request status values

Note. Project request functionality is also provided by PeopleSoft Project Portfolio Management, which is part of the PeopleSoft Enterprise Performance Measurement (EPM) product line. If PeopleSoft Project Portfolio Management is installed, project requests must originate in PeopleSoft Project Portfolio Management, rather than PeopleSoft Program Management, and you must use the project request workflow features in PeopleSoft Project Portfolio Management.

See Also

Appendix B, “Delivered Workflows for PeopleSoft Program Management,” page 133

Creating Project Requests

This section discusses how to:

- Establish project requests.
- Associate attachments with project requests.
- Establish estimated costs.
- Establish estimated benefits.
- Establish maintenance costs.
- Define project dependencies.
- Define project milestones.
- Review project costs and benefits.

- Review project request status history.

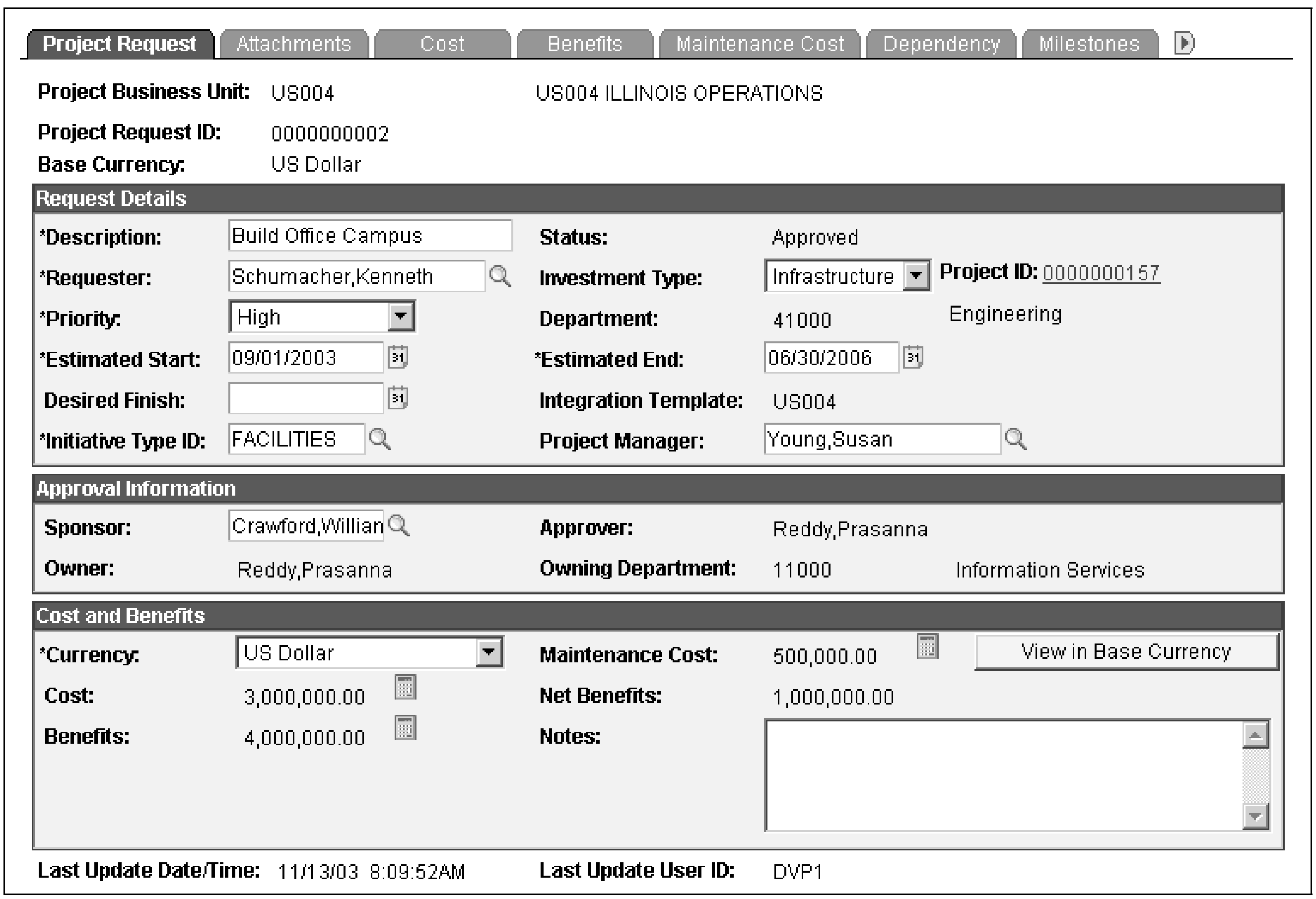
Pages Used to Create Project Requests

Page Name	Object Name	Navigation	Usage
Project Request	BC_PROJ_REQUEST1	Program Management, Project Request, Project Request	Create project requests.
Attachments	BC_PROJ_ATTACH	Program Management, Project Request, Project Request, Attachments	Associate file attachments with a project request.
Cost	BC_EST_COST	Program Management, Project Request, Project Request, Cost	Enter estimated cost details for a project request.
Cost Comments	BC_EST_COST_COM	Click the Comments button for individual rows in the Cost Details grid on the Cost page.	Enter comments about cost rows in the Cost Details grid.
Benefits	BC_EST_BENFT	Program Management, Project Request, Project Request, Benefits	Enter estimated benefit details for a project request.
Benefit Comments	BC_EST_BENFT_COM	Click the Comments button for individual rows in the Benefit Details grid on the Benefits page.	Enter comments about benefit estimates.
Maintenance Cost	PPK_MAINT_COST	Program Management, Project Request, Project Request, Maintenance Cost	Enter maintenance costs for a project request.
Dependency	BC_PRJREQST_DPN	Program Management, Project Request, Project Request, Dependency	Designate project requests upon which the current project request depends and view project requests that depend on the current project request.
Dependency Comments	BC_PRJREQST_DPN_CM	Click the Comments button on the Dependency page.	Enter comments about a project dependency relationship.
Milestones	BC_PRJREQST_MST	Program Management, Project Request, Project Request, Milestones	Enter project milestones and indicate their status.
Summary Cost/Benefits	BC_EST_COST_BENFT	Program Management, Project Request, Project Request, Summary Cost/Benefits	View a summary of the costs and benefits, by general ledger business unit and department, for a project request.

Page Name	Object Name	Navigation	Usage
Project Cost Details	BC_COST_DET	Click an estimated cost amount on the Summary Cost/Benefits page.	Review cost details for a department.
Project Benefit Details	BC_BENFT_DET	Click an estimated benefit amount on the Summary Cost/Benefits page.	Review benefit details for a department.
Status History	PPK_PROJREQ_AUD	Program Management, Project Request, Project Request, Status History	Review an audit trail of workflow approval status entries for the project request, or make additional comment entries.
Project Approval	BC_PRJ_APPROVAL	This page is automatically accessed when a user selects a project from the worklist.	Modify the approval status for a project request.

Establishing Project Requests

Access the Project Request page.



Project Request page

Request Details

Requester

Enter the name of the individual creating the project request or the person on whose behalf it is entered.

Priority

Select the project request's priority. There are five priority levels delivered with the application, and you are able to modify the description of each.

Priority labels are maintained on the Priority Description page.

See Chapter 3, "Setting Up PeopleSoft Program Management," Defining Project Request Priorities, page 14.

Estimated Start, Estimated End, and **Desired Finish**

Enter the corresponding project dates. The estimated start and estimated end dates will be 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.

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

Status

Displays the current status.

This field is display-only, and its value is either assigned by the system when an individual creates, submits, approves, declines, costs, or returns a project request, or is assigned by a project approver by using the View Project Requests page.

Status values are:

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

Submitted: Indicates 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 on the Project Request Estimate Summary page.
- When the project approver changes the status of the project request on the View Project Requests page.

Costing: Indicates 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 entered by the requester needs further validation by the project or program manager. A project approver can still approve or decline a project request while it is in *Costing* status.

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

Approved: Indicates the project request was submitted and has been approved by the project owner, and if necessary, the funding department managers. Once a project request is in a status of *Approved*, its status cannot be changed. Once the status changes to *Approved,* an active project is created, or if a project already exists, it becomes active. The system automatically changes the status of any other versions of the project request to *Declined*, and changes the status of their associated pending projects to inactive.

Cancelled: Indicates the project request was cancelled. A project request can only become cancelled when it is in a status of *Pending* or *Returned.* Once a project request is in *Cancelled* status, its status cannot change.

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

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

Investment Type

Select an investment type from the values in the drop-down list to describe the nature of the project request .

This field is used for informational purposes only.

Department

This field is used for informational purposes only and is the department of the individual whose name is entered in the Requester field on the project request. This department value is *not* the department to which costs or benefits are attributed. Costs and benefits are associated with a specific department by entering them using the Cost and Benefits pages within the Project Request component (BC_PROJ_REQUEST).

Integration Template

Select the project integration template that will be used to generate a project ID from the project request. To create projects in PeopleSoft Project Costing, integration templates are required to indicate how transactions can map from the project to business units used in other PeopleSoft applications.

See *PeopleSoft Project Costing 8.8 PeopleBook*, “Structuring PeopleSoft Project Costing,” Creating Templates for Integration with Other Applications.

Project Manager

Select the name of a project manager, if this position has been determined. This field is required when an approver changes the project request to a status of *Costing*.

Approval Information

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

Sponsor Select the person who is endorsing this project.

Depending on your PeopleSoft Program Management installation settings for workflow, this individual may receive email notifications as the project request status changes.

Owner 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 Mapping table to identify the name of the individual. The Owner field is display-only prior to submitting the project request for approval, at which time it becomes editable so that the project owner can change ownership responsibility to another individual, if 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 Project Owner field value when a project request is created and saved. Once the project request has been submitted this field becomes editable so that the project owner can change the approver to another individual, if appropriate.

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

- When a project request is submitted.
- When a project manager changes a project request with a status of *Costing* to a status of *Submitted* by selecting 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 identified in the Owner field.

This field is used for informational purposes only.

Cost and Benefits

This section displays calculated costs and benefits information, which is derived from other pages in the Project Request component.

Currency Select the transaction currency in which you are entering all amounts on this project request.

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

Note. If you have entered any costs or benefits on either the Project Request component's Cost, Benefits, or Maintenance Cost pages, you cannot change the currency without first deleting the cost and benefit data.

Cost, Benefits, and **Maintenance Cost**

These fields display the total estimated cost, benefit, and maintenance cost for the project request in the currency shown in the Currency field.

Click this button to access the appropriate page to enter or view detailed amounts for costs, benefits, or maintenance costs for the button's associated field.

Net Benefits

The amount displayed in this field is calculated as *Benefits − Cost*, however, the time value of money is not taken into account. If the cost amount exceeds the benefit amount, the system displays 0.00, as it does not allow negative amounts for this field.

Notes

Enter any combination of characters to clarify or explain this section of the project request.

View in Base Currency

Click this button to view monetary amounts in the base currency of the business unit.

Selecting this option impacts the amounts on the Project Request page and the Summary Cost/Benefits page. Using the button toggles 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.

Once you click the View in Base Currency button, the label changes to View in Transaction Currency, which, when clicked, converts the totals back to the transaction currency.

Project Versions

The system displays this section if there are multiple versions of a project request. There is a row for each version that lists the version's project request ID, description, and status.

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

Note. Project request versioning is managed slightly differently than most types of versioning, in which there is one main document with multiple versions attached. For project requests, each version is a unique project request; the system links every new version to the original project request by storing the original project request's ID in the *Version of* field.

Actions

Submit

Click this button to submit a *Pending* or *Returned* project request for approval.

Create a New Project Request Version

Click this button to create a new version of this request.

The system creates a new project request with several of the fields populated with values from the original project request. Edit the values that differ for this version, add new values, then save or submit the project request.

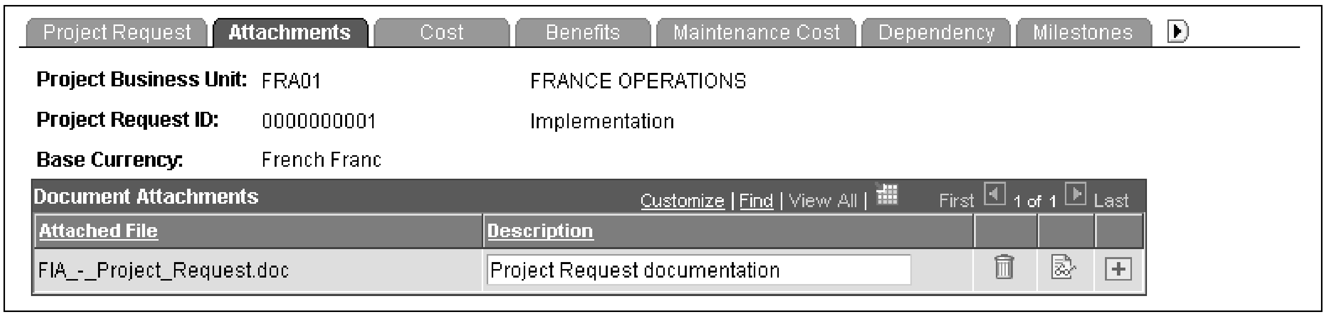
See Also

Chapter 5, "Establishing Project Requests," Understanding Project Requests, page 43

Chapter 5, "Establishing Project Requests," Project Request Approval Workflow, page 44

Associating Attachments with Project Requests

Access the Attachments page.



Attachments page

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

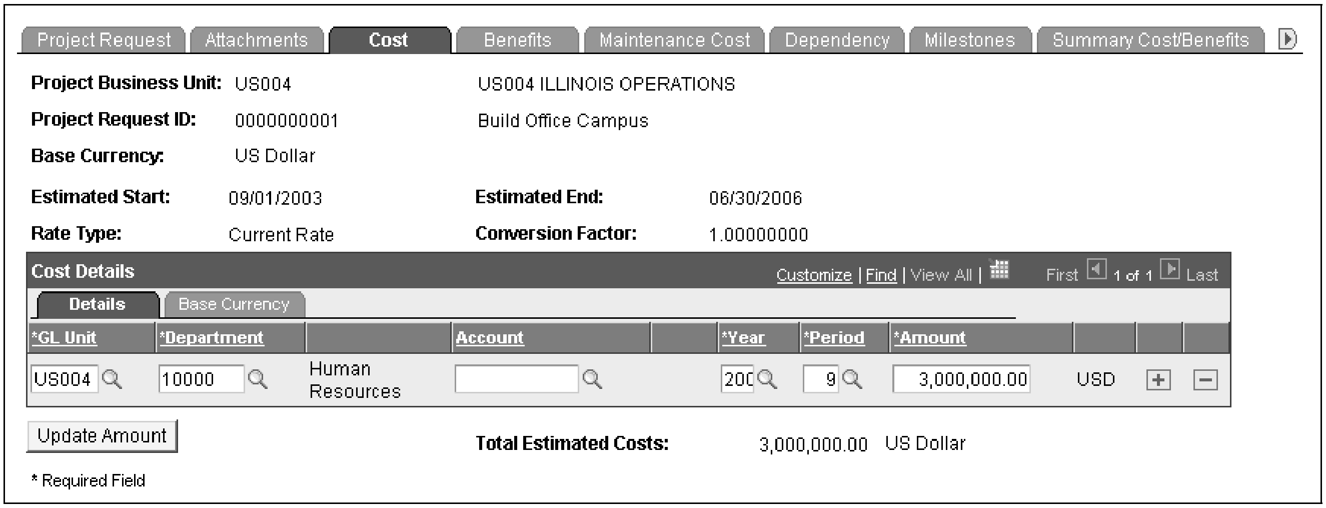
For example, users can attach a project plan, cost spreadsheet, flowchart, or request for proposal to this project.

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.

Establishing Estimated Cost

Access the Cost page.



Cost page

Cost Details - Details Tab

Enter cost information related to the project or program you are requesting. The currency of the entered amounts is specified in the Currency field on the Project Request page. Costs are entered for the specified general ledger business unit (GL Unit). Add necessary rows to enter all costs associated with the project.

GL Unit (General Ledger Unit)	Enter the general ledger business unit associated with this cost.
Department	Select the department associated with this cost. Only departments of the specified GL unit are valid.
Account	Select the account to which the cost is attributed. Only accounts of the specified GL unit are valid.
Year and **Period**	Enter the fiscal year and period the cost is incurred.
Amount	Enter the cost amount in the currency of the project request. The currency code is displayed next to the amount field.
Update Amount	Click this button to update the amounts on the main project request page based on the data entered on the Cost page.

Base Currency Tab

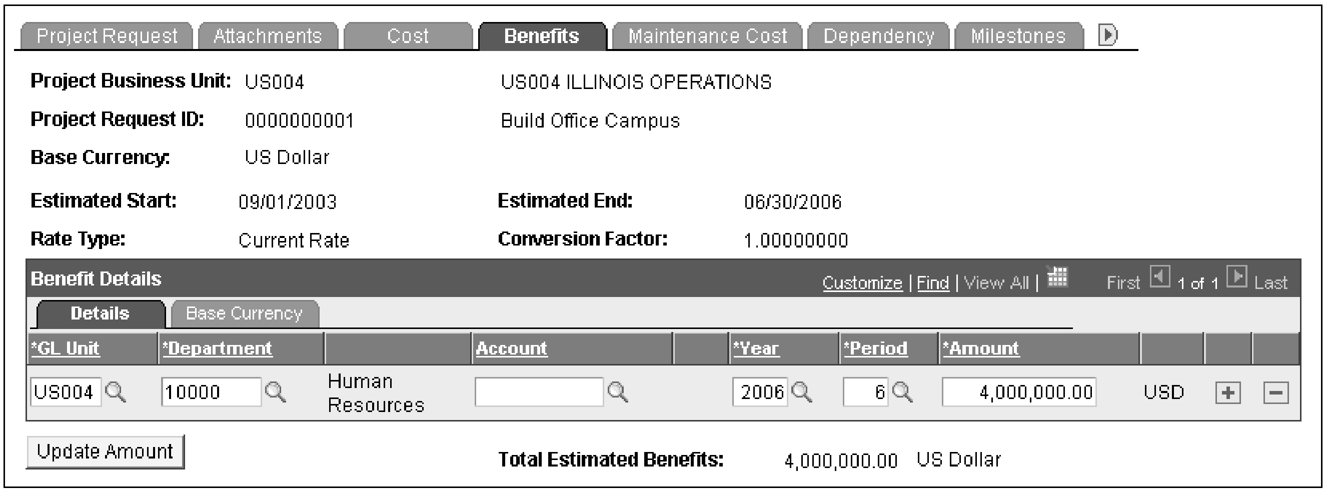
Select this tab to view costs in the base currency of the business unit that is associated with the project request.

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

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

Establishing Estimated Benefits

Access the Benefits page.



Benefits page

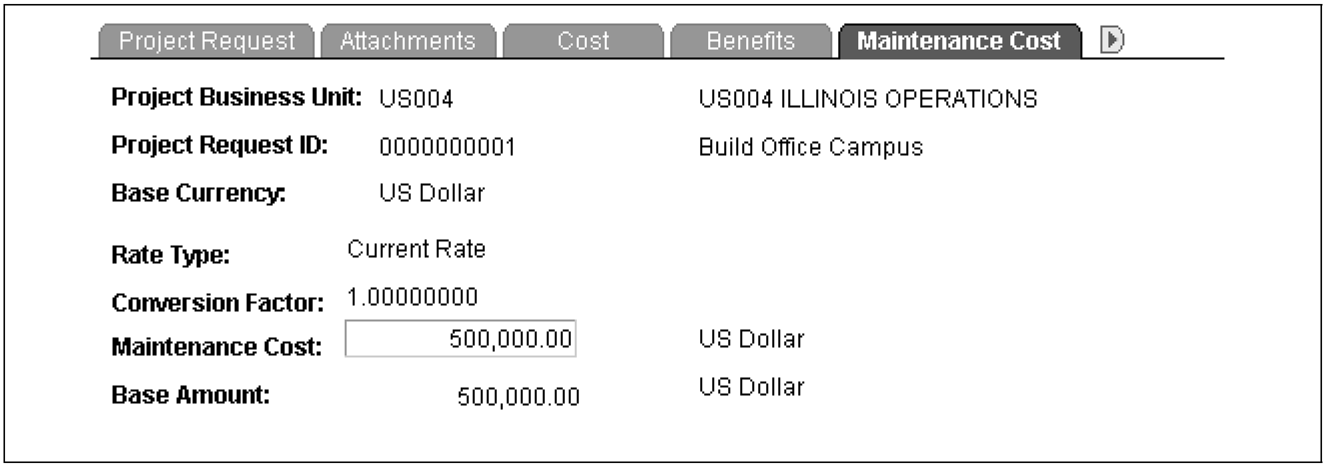
Enter the expected benefits for the project, by GL business unit, department, and account, adding rows as needed. The fields on this page operate identically to fields on the Cost page.

See Chapter 5, "Establishing Project Requests," Establishing Estimated Cost, page 54.

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

Establishing Maintenance Costs

Access the Maintenance Cost page.

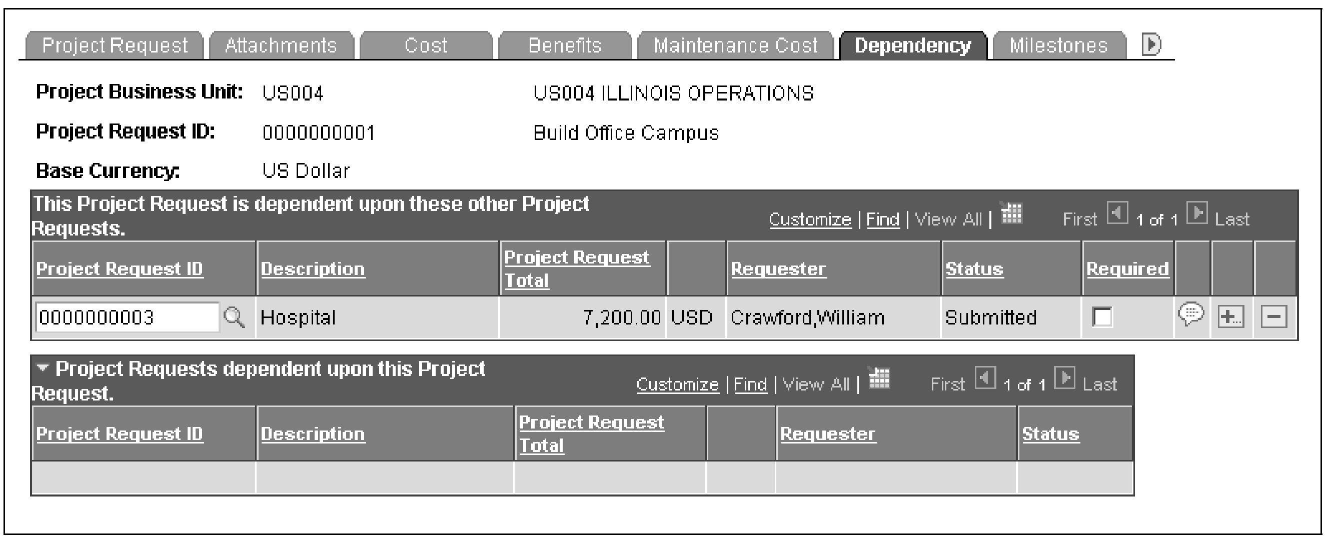


Maintenance Cost page

Enter the annual costs you expect the project will incur in perpetuity after the project request's estimated end date. The amount is in the currency of the project request .Enter a value only if you anticipate incurring costs year after year beyond the Estimated End Date. This is for informational purposes only in PeopleSoft Program Management.

Defining Project Dependencies

Access the Dependency page.



Dependency page

Use this page to identify 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.

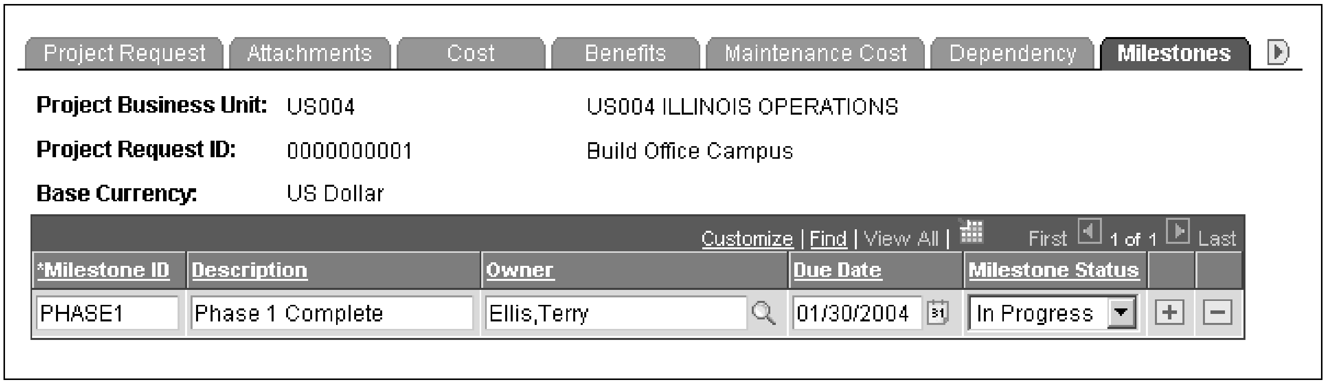
Required

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 a user can add comments that describe the rationale and impact of the dependency.

Defining Project Milestones

Access the Milestones page.



Milestones page

Insert rows as needed to document project milestones. This data is only for informational purposes.

Milestone ID Enter a unique identifier for the milestone.

Owner Select the individual responsible for this milestone.

Due Date Enter the due date for this milestone.

Milestone Status Select the current status of the milestone. Options are:

Cancelled.

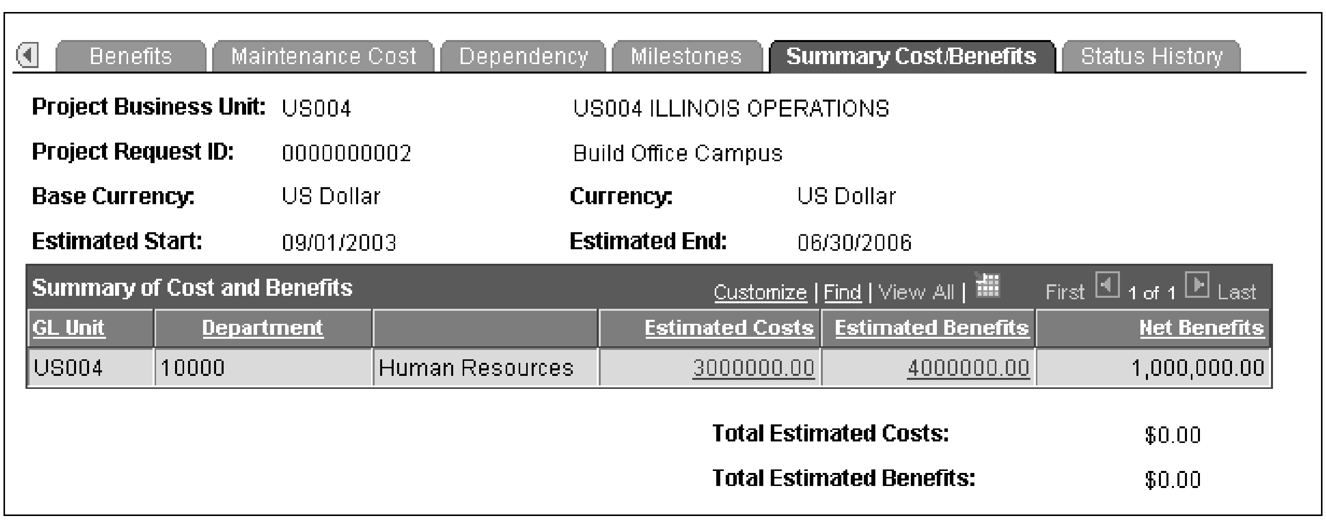
Completed.

In Progress.

Not Started.

Reviewing Project Costs and Benefits

Access the Summary Cost/Benefits page.



Summary Cost/Benefits page

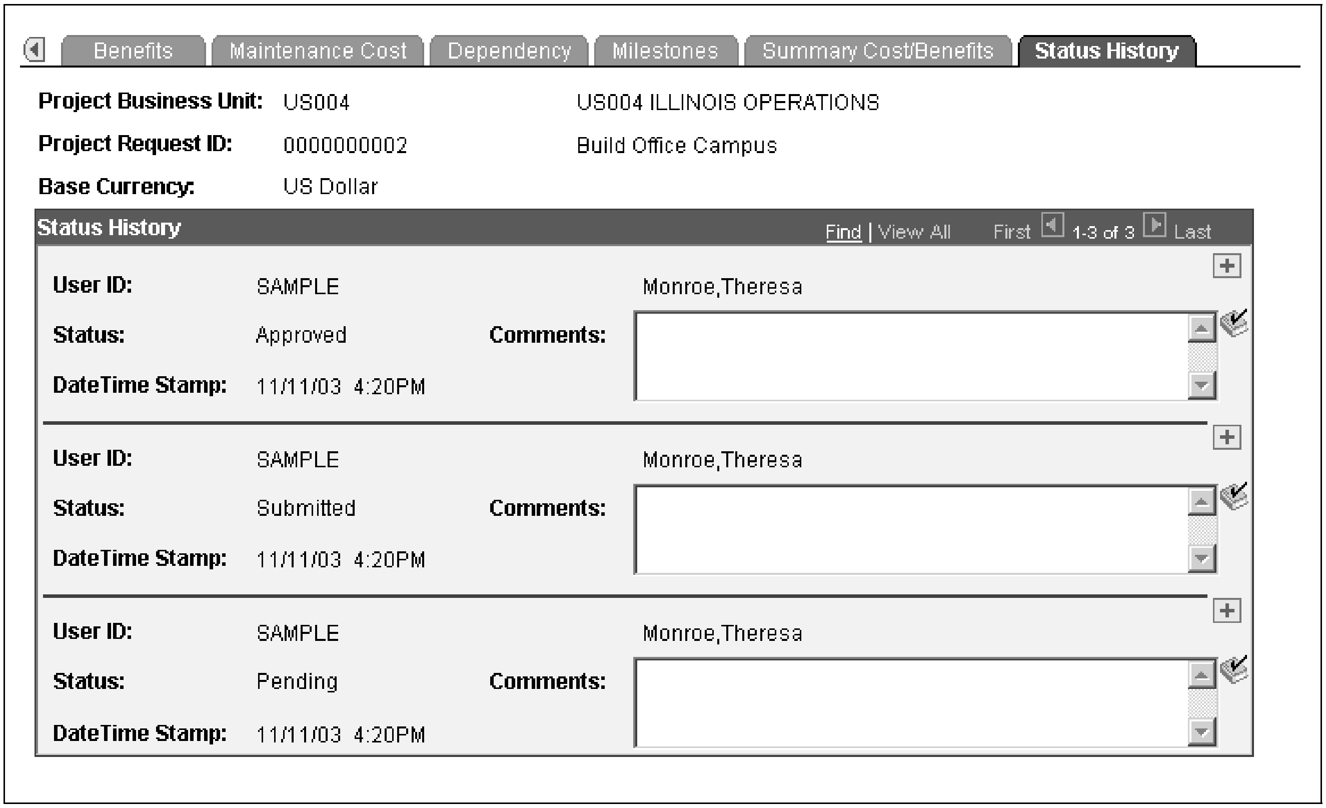
This page provides a summary of the current estimated costs, estimated benefits, and net benefits for the project request, by general ledger business unit and department.

Estimated Costs Click this link to access the Project Cost Details page, where you can view all costs associated with the current department for this project request.

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

Reviewing Project Request Status History

Access the Status History page.



Status History page

This page displays all status changes for the lifecycle of the project request and any comments made by the approver during the worfklow approval process. In addition, you can insert comments on this page to have them date/time stamped. Once a comment is entered here, the system does not allow it to be edited.

Viewing Project Requests

This section discusses how to:

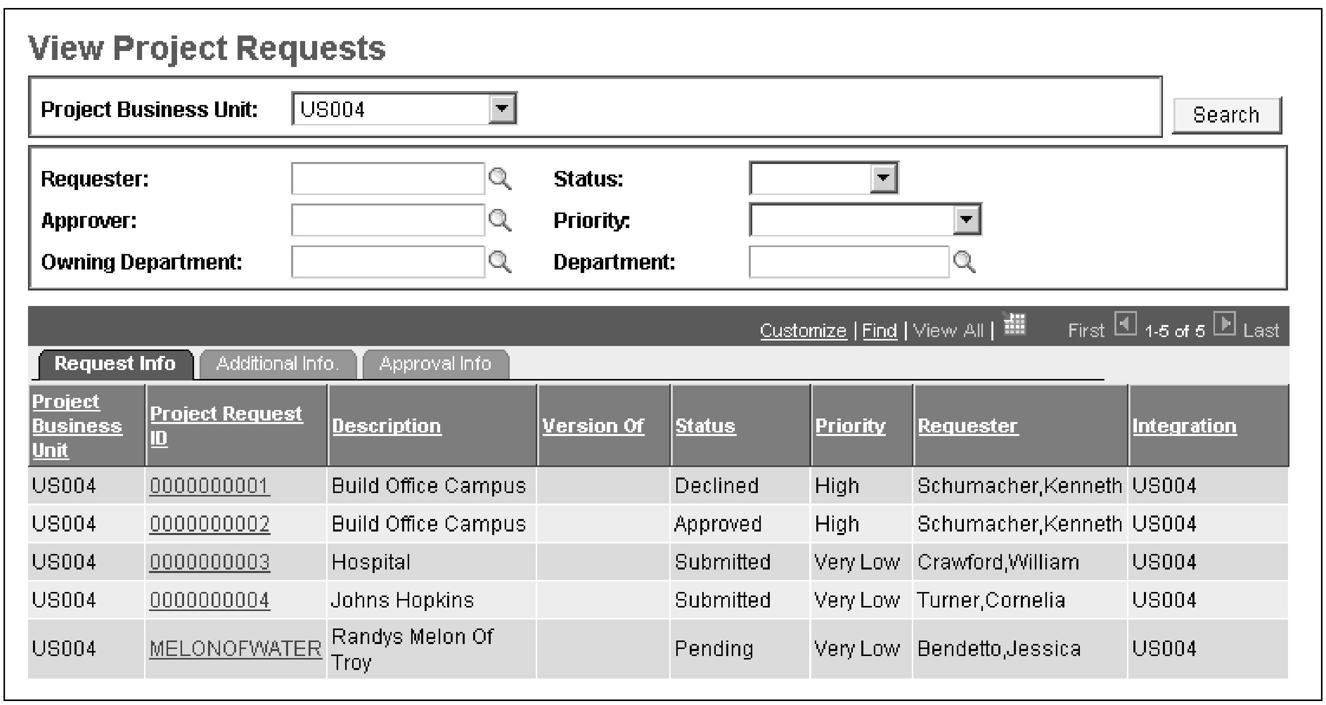
- Review established project requests.
- Revise project request cost estimates.

Pages Used to View Project Requests

Page Name	Object Name	Navigation	Usage
View Project Requests	BC_PRJREQST_LIST	Program Management, Project Request, View Project Requests	Review established project requests. Optionally, provide criteria to filter the results by one or more of these fields: business unit, requester, approver, owning department, department, priority, or status.
Project Request Comments	BC_PRJ_COMMENT_SEC	Click the Comments button on the Additional Info. tab of the View Project Requests page.	Enter notes about a specific project request.
Project Request Estimate Summary	PGM_PR_SUM	Program Management, Project Request, Project Request Est. Summary	Review the totals of a revised project or program cost estimate and update the associated project request with the revised cost estimate.

Reviewing Established Project Requests

Access the View Project Requests page.



View Project Requests page

Specify the business unit for which to view project requests. To view all project requests for a business unit, leave the remaining search fields empty and click the Search button.

To view a filtered list of project requests, enter criteria in one or more of the fields, then click Search.

Note. The View Project Requests page is meant to facilitate the job performed by project owners and approvers. It enables them to quickly find, analyze, and dispatch project requests. Because this page is able to access and manipulate all of the data on a project request, including its status, it is important to restrict access to this component to the appropriate people within your organization.

Request Info Tab

This tab displays general information about the project request, enabling users to view summary information for project requests that are of particular importance.

Project Request ID Click a project request ID to access the Project Request page, where you can view and edit details for this project request.

Additional Info. Tab

This tab displays additional information pertaining to the project request, and enables project approvers to add comments, change the investment type and initiative type, and override the default owner and approver that the system automatically enters based upon the initiative type. Changing the approver causes the new approver to receive a project request worklist entry for approval.

Approval Info Tab

This tab displays general information about the project request and enables a project approver to see the current project request status and change it.

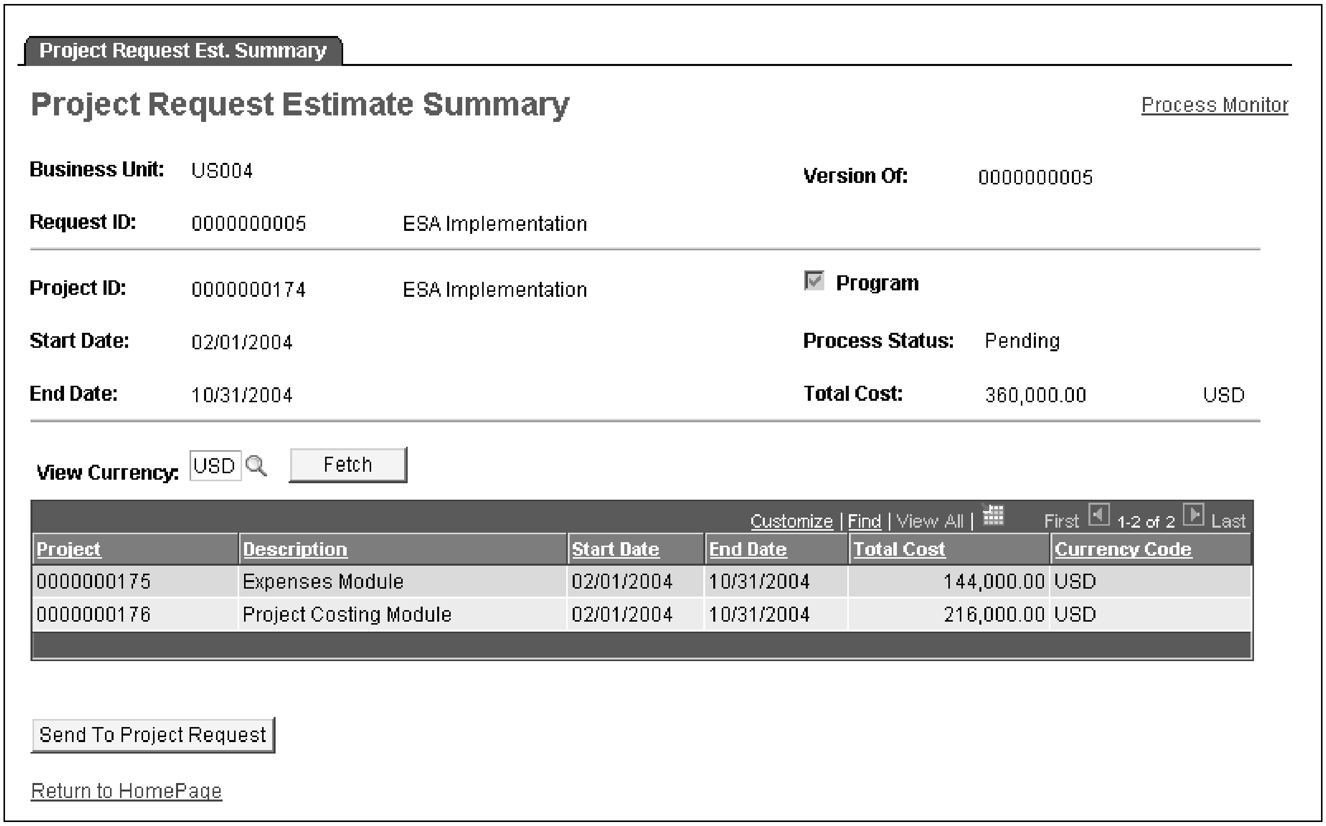
Click to access the Project Request Comments page, where you can enter comments about the project request.

Set Status For each project request that is displayed in the grid, the project approver can review the current status and change it, if necessary, by making a selection from the drop-down list for this field. Changing the project request status triggers the same PeopleSoft Workflow actions as when the approver changes it on the PeopleSoft Workflow approval page. The status choices that are available vary depending on the request's current status. For example, a *Pending* project request offers only *Submitted* and *Canceled* as valid status values, while a *Submitted* request can be changed to *Approved* (or *Operationally Approved* if funding department manager approval is required), *Declined*, *Costing*, or *Returned.*

See Chapter 5, "Establishing Project Requests," Project Request Approval Workflow, page 44.

Revising Project Request Cost Estimates

Access the Project Request Estimate Summary page.


Project Request Est. Summary

Project Request Estimate Summary

Process Monitor

Business Unit: US004

Version Of: 0000000005

Request ID: 0000000005 ESA Implementation

Project ID: 0000000174 ESA Implementation

Program

Start Date: 02/01/2004

Process Status: Pending

End Date: 10/31/2004

Total Cost: 360,000.00 USD

View Currency: USD Fetch

Customize | Find | View All | First 1-2 of 2 Last

Project	Description	Start Date	End Date	Total Cost	Currency Code
0000000175	Expenses Module	02/01/2004	10/31/2004	144,000.00	USD
0000000176	Project Costing Module	02/01/2004	10/31/2004	216,000.00	USD

Send To Project Request

Return to HomePage

Project Request Estimate Summary page

When a project owner sets a project request to a status of *Costing*, the system creates a project in *Pending* status and optionally generates a worklist entry for the individual identified as the project manager on the project request. At that time, the project manager can then pursue either of these courses of action:

- Create a detailed cost estimate in PeopleSoft Program Management by opening the project, adding activities and resources to the project, and optionally, adding the project to the enterprise program tree.
- Convert the project to a program, create one or more projects subordinate to the program, add activities and resources to the detail projects, and add the program and the project(s) to the enterprise program tree.

Regardless of which approach is taken to create a detailed cost estimate, when the estimate is built, the project manager needs to transmit the completed estimate to the project request.

This page enables you to update project requests with revised cost estimates, and generate a budget plan in PeopleSoft Project Costing. It can only impact projects and programs associated with project request’s that are currently in *Costing* status. This page converts costs to a common currency based on this algorithm:

1. All cost estimates at the activity level are converted to their project currency.
2. All project cost totals are then converted to the view currency that is selected on the Project Request Estimate Summary page.
3. All of the project or program costs are then converted to:
    a. The project request transaction currency to load the cost data to the project request cost page.
    b. The default budget currency for the project business unit to create and load a budget plan.

If you are creating a detailed cost estimate for a program that has projects subordinate to it, create the estimates in the projects, not in the program itself, because programs cannot have resources or activities added to them directly. If you are creating a detailed cost estimate for a program that has projects subordinate to it, you must add the program to the enterprise program tree, then add its subordinate projects to the tree. If you do not establish this relationship in the enterprise program tree, the Project Request Estimate Summary page will not be able to determine which projects to include when compiling costs for the consolidated estimate.

View Currency	The currency in which to view amounts.
Fetch	Click to restate all of the estimated project costs in the currency specified in the View Currency field.
Send to Project Request	Click to launch the Project Request Estimate Update application engine process (PGM_SPREAD), which loads all of the estimated project or program costs to the project request and creates a budget plan based on the estimated costs. The PGM_SPREAD process determines how to allocate costs proportionally into the appropriate fiscal years and calendar periods for the project request based upon the calendar used for project requests by the PeopleSoft Program Management business unit and for the project budget based upon the default budget calendar setting on the PeopleSoft Project Costing business unit definition.

See Also

Chapter 3, “Setting Up PeopleSoft Program Management,” Defining Business Unit Options, page 20

PeopleSoft Project Costing 8.8 PeopleBook, “Defining Project Business Units,” Defining Project Business Units

Converting Currency

This section provides an overview of the convert currency utility, and discusses how to synchronize monetary amounts for project requests.

Understanding the Convert Currency Utility

If several project requests are entered on different dates and the effective currency conversion rate differs among those dates, use the convert currency function to update amounts so that project requests use the current currency conversion rate. This ensures that users view project costs and benefits based on the same conversion rate. The system only updates amounts for project requests that are not yet approved. It does not update projects with a status of assigned, canceled, or declined.

This currency conversion utility addresses situations such as this example: an approver is evaluating two project requests created on different dates. Both project requests have the same cost amounts and were entered in a transaction currency of Canadian Dollars. If the effective currency conversion rate differed on the dates that each project request was created, the project requests will appear to have different cost amounts when viewed in the base currency, say Japanese Yen, because they used different exchange rates.

Page Used to Convert Currency

Page Name	Object Name	Navigation	Usage
Process Currency Conversions	PPK_PROCESS	Program Management Management, Project Request, Currency Conversion	Updates project request base amounts using exchange rates currently in effect.

Running Currency Conversion

Access the Process Currency Conversions page.

Click Run Now.

The process converts each project request's cost and benefit transaction amounts to the base currency of the project business unit and updates the base amounts stored on the project request. The process uses the rate currently in effect for the rate type specified on the Conversion Rate Type page.

See Chapter 3, "Setting Up PeopleSoft Program Management," Defining the Currency Conversion Rate Type, page 13.

CHAPTER 6

Scheduling and Managing Resources

This chapter provides an overview of the available resource tools and discusses how to:

- Work with resources.
- Analyze resource lists.
- View the Resource Workbench.

Understanding Resource Tools

Successful delivery of a project highly depends on the ability to plan and apply the right level of resources. PeopleSoft Program Management provides a number of resource tools to support the planning and management of projects and programs. In addition, integration with PeopleSoft Resource Management enables project managers to search for qualified resources, check their schedules, and assign them to projects.

Important Concepts

When using resource pages in PeopleSoft Program Management, it is necessary to understand these concepts:

Resource Class

Categorizes resources; each resource class possesses unique attributes and requires different calculations for cost purposes. The system recognizes three types of resources: labor, material, and assets.

Work

Measures the amount of effort, in hours, that an activity requires. Applies only to labor resources.

Actual Work

Tracks the amount of time a resource has currently expended working on an activity. Actual work can be updated by: PeopleSoft Expense's time entry, PeopleSoft Project Costing's time entry, PeopleSoft Project Costing's transaction entry, or PeopleSoft Time and Labor.

When PeopleSoft Project Costing obtains time data from other PeopleSoft applications, actual work is updated.

Actual work is *not* updated from Microsoft Project when you use PeopleSoft Program Management's Microsoft integration.

See *PeopleSoft Project Costing 8.8 PeopleBook*, "Integrating with Microsoft Project 2002".

Remaining Work

The amount of time left to complete an activity. Remaining work equals *Work − Actual Work.*

Schedule Method	Determines what element of a schedule remains constant when one of the three scheduling variables (work, duration, or units) changes. The schedule method that is used determines which variable of the equation *Duration = Work ÷ Units* is held constant when a schedule is recalculated.
Unit	Indicates the percentage of the resource's time that is assigned to an activity. The higher the number of units for a resource on an activity, the less available the resource is in a given day to work on other activities.

Resource Component Pages

The Resource component (PGM_RESOURCE_LIST) contains three main pages for staffing a project and managing its resources. Each page enables you to control different dates for each resource on the project. These pages are:

- The Resources page.

  This page lists all of the resources used on a project. It indicates the earliest start date and latest end date that the resource is working on the project, enables a project manager to generate assignments in the PeopleSoft Resource Management application to keep resource schedules updated, and provides a launching point to other pages which help a project manager ensure that resources are staffed on activities at optimal levels.

- The Resource Detail page.

  Shows details for a specific resource.

- The Resources by Activity page.

  Shows the resources associated with a specific activity.

  This page is critical to assembling an appropriate mix of labor, asset, and material resources to each activity on a project. By entering a labor resource and adjusting the resource's units (the percentage of a work day that the resource is allocated to work on an activity) and the resource's work (the number of hours that the resource is slated to work on the task), the system can determine how long it will take the activity to complete (the duration). By adjusting the schedule method, adding additional resources, or changing work, duration, or units, you cause the system to recalculate the other unchanged values, including remaining work. For each project activity, this page enables you to add or remove the resources necessary to complete the activity. After each change, you can immediately see the impact to the activity's duration and the labor resources' work levels. By using this page, the Project Estimate Summary page, the View Resource Usage page, and the Project Activities page, a project manager is able to deploy resources to activities, model costs, determine whether resources are appropriately utilized, and manage activity dates and durations.

  If you are creating a complex project that contains tens or hundreds of activities, dependencies, and resources, and the project requires sophisticated labor resource leveling capabilities, you may want to construct and level your plan using a third-party project management tool from which you can load project information into PeopleSoft Program Management. PeopleSoft Program Management can send and receive project data with both Microsoft Project 2002 and Primavera.

  See *PeopleSoft Project Costing 8.8 PeopleBook*, "Integrating with Microsoft Project 2002" and *PeopleSoft Project Costing 8.8 PeopleBook*, "Integrating with Primavera Applications".

Scheduling Resources

To staff a project with resources in PeopleSoft Program Management you can either use of these options:

- First create project resources, and then assign them to activities.

- First add resources directly to activities, then let the system automatically put them on the project as project resources.
- Create the resources in Microsoft Project 2002 or Primavera and load the resources into PeopleSoft Program Management.

If you use the first or second option or some combination of the two, PeopleSoft Program Management will automatically update several dates and trigger conflict warnings. If you use the third option, then all of the dates load into the fields of the Resources, Resource Detail, and Resources by Activity pages automatically.

When you add a project resource, the system automatically creates a row of data in the assignment schedule grid of the Resource Detail page, with the default start and end dates for the resource set to the project start and end dates.

To help you understand the behavior of the Resources component, this table describes how a change to one field value in the component impacts others:

Action	Result
You add or change a row of data for a resource in the Assignment Schedule grid of the Resource Detail page.	The conflict warning indicator will appear if the assignment schedule date range is reduced in such a way that a resource is working on an activity that has dates outside the bounds of the assignment schedule dates for the resource.
You add or change a resource on the Resources by Activity page for an activity.	If the resource has not been established on the Resources page, the system adds the resource, setting the planned start and end dates equal to the activity start and end dates, respectively, of the first activity to which the resource is added. If the resource has already been established on the Resources page and the change on the Resources by Activity page extends a date so that it is outside the bounds of the resource's date on the Resources page, a change is triggered to the Resources page dates for the resource; this change may trigger a warning if the date change makes the resource's activity dates fall outside the dates shown for the resource on the Resources page.

Resource Conflicts

The system indicates there are resource conflicts by displaying a conflict warning indicator next to a resource's name on the Resources page when any of these conditions occurs:

- In the Assignment Schedule grid on the Resource Detail page, a resource is associated with an activity on the project that has dates which fall outside of the date ranges specified for the resource.
- On the Resources by Activity page, the sum of a resource's units on activities for any day total more than 100 percent.

To resolve scheduling conflicts, either:

- Extend the resource's assignment schedule end date on the Resource Detail page.
- Reduce the resource's units on the Resources by Activity page.

Generic Resources

Generic resources are resources that do not have an employee ID associated with them; they serve as role-oriented placeholder descriptions for resources during the project planning phase. Typically, in the planning stage, project managers will use generic resources, instead of named resources. Once the project has been approved to execute, project managers can create resource requests and replace generic resources with the specific resources that have been identified as available.

Generic resources are associated with a project by using the Resources page.

The Manage Generic Resource page enables project managers to view all generic resources associated with a project, and create service orders and resource requests so a named resource can be assigned.

To replace a generic resource with a named resource, either:

- Access the Resources page, and select an employee ID to create a direct assignment.

  Once an employee is selected, the system replaces the existing generic resource name with the employee name.
- Access the Manage Generic Resources page, and generate service orders for the generic resource.

  Once an actual named resource is found and an assignment is created for the resource request by using PeopleSoft Resource Management, the generic resource no longer appears in the Manage Generic Resources page, and the named resource replaces the generic resource throughout the system.

Working with Resources

This section discusses how to:

- Define project resources.
- Work with resource details.
- Define activity resources.
- Manage generic resources.
- View resource usage.
- View project estimates.

Pages Used to Work with Resources

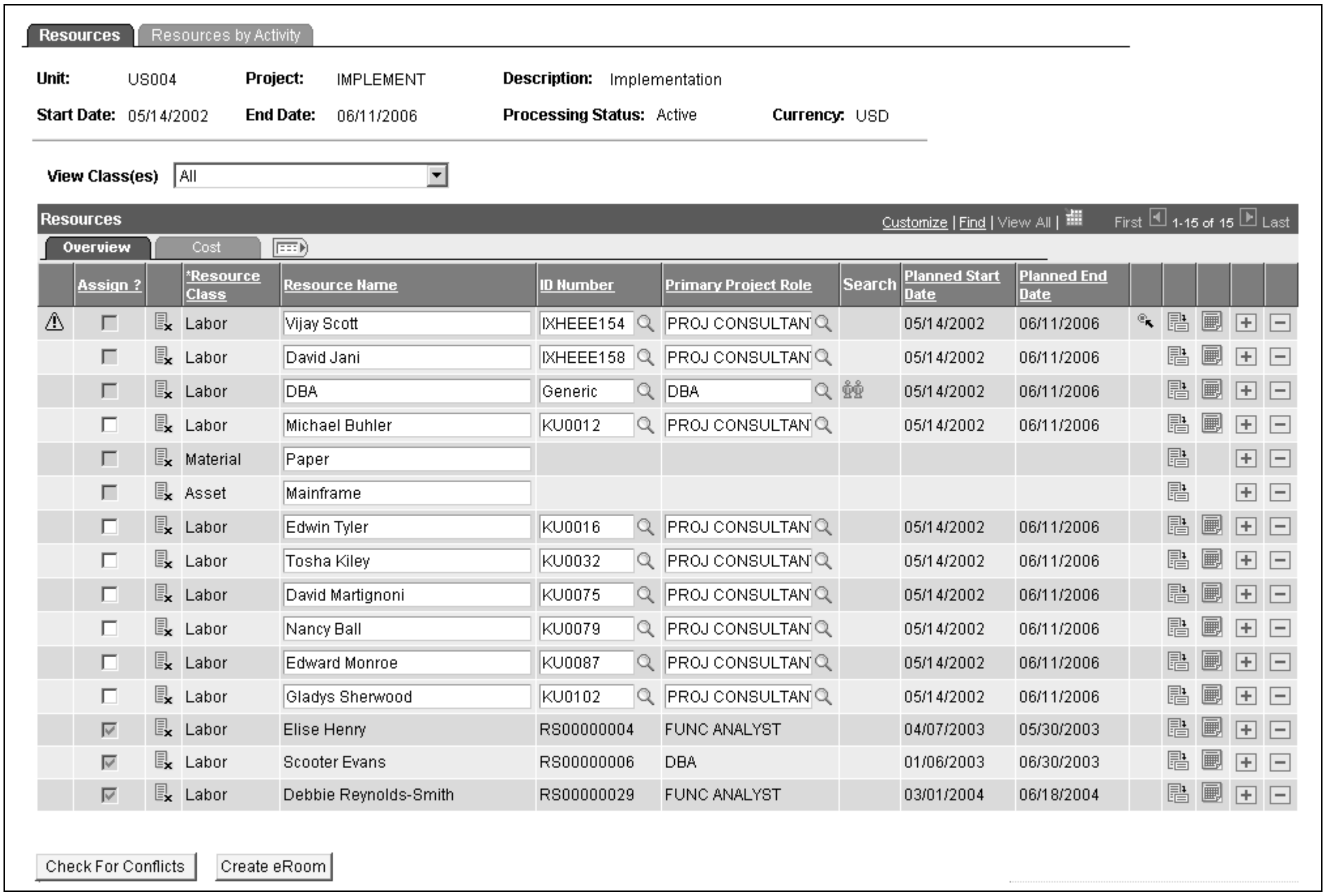
Page Name	Object Name	Navigation	Usage
Resources	PC_PRL	Program Management, Project Definitions, Resources	Add or delete resources and related cost data at the project level to build project estimates and project teams.
Express Search	RS_EXPRESS_SEARCH	Click a button in the Search column on the Resources page.	Use this page to identify qualified candidates as project resources. The Express Search page is a part of PeopleSoft Resource Management.

Page Name	Object Name	Navigation	Usage
Resource Detail	PC_PRL_SCHED	Click the Resource Detail button on the Resources page.	View and update the description and assignment schedule for a labor resource. View requested schedule changes for a resource and the activities upon which a resource is working.
Resources by Activity	PC_ARL	Program Management, Activity Definitions, Resources, Resources by Activity	View and edit resources that are assigned to an activity.
Assign Resources from Project	PROJ_TEAM_COPY	Click the Add Resource from Project button on the Resources by Activity page. This page is a part of PeopleSoft Project Costing.	Assign resources.
Manage Generic Resources	PGM_GENRES_01	Program Management, Project Definitions, Manage Generic Resources	View generic resources and generate service orders to find named resources to replace the generic resources.
View Resource Usage	PGM_RES_USAGE	• Program Management, Program Tools, View Resource Usage • Click the Resource Usage button on the Resources page.	View work and activity details for a labor resource and identify overallocations of a resource's time within a single project as well as from an enterprise perspective.
Project Team Standard Rate Sheet	PC_TEAM_RATES	Click the Team Rates link on the Resources page.	View cost and bill rates for project labor resources. This page is a part of PeopleSoft Project Costing.
Schedule Chart	PC_TEAM_SCHEDCHART	Click the Resource Chart link on the Resources page. The Schedule Chart appears as an additional tab in the Resources component.	View a Gantt chart that displays the schedule of project labor members. This page is a part of PeopleSoft Project Costing.
Project Estimate Summary	PGM_PROJ_EST_SUMM	Click the Project Estimate Summary link on the Resources page.	View a summary of activities with associated work and cost estimates.
Monthly Schedule	RS_SCHED_MONTH	Click the View Resource Calendar link on the Resource Detail page.	Use this page to view a labor resource's schedule one calendar month at a time. The Monthly Schedule page is a part of PeopleSoft Resource Management.

Page Name	Object Name	Navigation	Usage
Assign Resource	RS_ASSIGN_MAIN	Click a link in the Assignment id column on the Resource Detail page.	Use this page to view and edit details of the resource's assignment. The Assign Resource page is a part of PeopleSoft Resource Management.

Defining Project Resources

Access the Resources page.



Resources page

View Class(es) Select the resource classes to view in this list. Options are: *All, Asset Resource, Labor Resource,* or *Material Resource.*

Resources - Overview Tab

This conflict warning indicator appears next to each resource that the system determines has a schedule conflict. Mouse over the indicator to view a message that indicates the nature of the conflict.

Reserve? or **Assign?** For resources who have an employee ID in the ID Number field, select this check box to officially assign the resource to this project in the PeopleSoft

Resource Management application. This field is available only if the employee ID is established as a resource in PeopleSoft Resource Management.

The field label and resulting action differs depending on the project processing status:

- Reserve? appears for projects in *Pending* status, and when you select this option, the system generates an assignment in PeopleSoft Resource Management in *Reserved* status.
- Assign? appears for projects in *Active* status, and when you select this option the system generates an assignment in PeopleSoft Resource Management in *Assigned* status, or if the project business unit requires all assignments to be approved by the resource's manager, in *Pending Approval* status.

Note. If you change the project's processing status from *Pending* to *Active*, you must manually change the status of the assignment from *Reserved* to *Assigned.* Assignments do not automatically convert to an assigned status when the project becomes active.

Note. Because generic labor resources do not have an employee ID, they cannot be staffed in PeopleSoft Resource Management, and this field is unavailable for generic resources.

Click this button to cancel the resource assignment, or to indicate the resource has completed the assignment.

Resource Class

This field indicates that the resource belongs to one of these categories:

Labor: a human resource, with or without an employee ID, that can be associated with activities. The system calculates work, remaining work, and allows the entry of actual work and rates for labor resources.

Material: a consumable resource. For example, lumber is a material resource. Material resources do not have planned start and end dates or roles on the project, the system does not generate assignments for them in PeopleSoft Resource Management, and they do not have assignment schedules on the Resource Detail page of the Resources component.

Asset: a non-human resource. For example, a computer is an asset resource. Asset resources do not have planned start and end dates or roles on the project, the system does not generate assignments for them in PeopleSoft Resource Management, and they do not have assignment schedules on the Resource Detail page of the Resources component

Resource Name

Enter an identifier for the resource.

For labor resources, these options are available:

- Enter the exact name of an employee ID-based resource; the system finds the resource's employee ID, and the employee ID appears automatically in the ID Number field.

- Enter a generic resource name, such as *Technician 1;* the system automatically populates the ID Number field with *Generic*, indicating that the resource is not recognized as a resource with an employee ID.

The differences between generic resources and labor resources are:

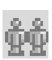
- Generic resources can serve as place holders that can be used to generate service order resource requests in PeopleSoft Resource Management, employee ID-based resources cannot.
- On the Resources page, generic resources have the Express Search button available. When you click the Express Search button, the system invokes PeopleSoft Resource Management's Express Search feature, which enables you to search for qualified employee ID-based resources to fill the generic resource slot.
- Generic resources cannot have assignments in PeopleSoft Resource Management, because assignments require an employee ID.

ID Number

Select a unique identifier for the resource. This field applies only to labor resources. When you first insert a row within the Resources grid, this field defaults to *Generic*. If you enter a value in the Resource Name field that is associated with an employee ID, the system automatically populates this field with the resource's ID. Or, if the Resource Name is blank, and you select an employee ID, the system automatically populates the Resource Name field with the associated employee name.

Primary Project Role

Select the associated job function for the resource. This field applies only to labor resources.



Click this button to access the Express Search page in PeopleSoft Resource Management where you can identify qualified candidates for the project. This button is available only when the Resource Class field value is *Labor* and the ID Number field value is *Generic*.

See *PeopleSoft Resource Management 8.8 PeopleBook*, "Express Searching for Resources".

Planned Start Date

The date on which the resource is expected to begin working on the project. This field applies only to labor resources. This is a display only field, and the system determines this date by using the earliest start date of all assignments for the resource.

Planned End Date

The date on which the resource is expected to finish working on the project. This field applies only to labor resources. This is a display only field, and the system determines this date by using the latest end date of all assignments for the resource.

This indicator appears for resources who have multiple assignment schedule rows for the project; click the Resource Detail button to view scheduling and assignment elements for the resource.

Click this button to access the Resource Detail page, where you can view scheduling and assignment elements for a resource.

Click this button to access the View Resource Usage page where you can view work and activity details for a resource.

See Chapter 6, "Scheduling and Managing Resources," Viewing Resource Usage, page 82.

Check for Conflicts

Click this button to determine whether any resource on the project has been overscheduled, or has conflicts between these dates: assignment schedule dates, project planned start and end dates, and activity dates. If conflicts exist, the system displays a conflict warning indicator next to the resource name.

Note. When working with the Resources component or the Project Activities component to adjust resource dates and units and activity dates and durations, respectively, the system automatically checks for conflicts so that when you return to the Resources page, you can immediately see that a conflict exists. However, if you are synchronizing your project resources and activities between Microsoft Project 2002 or Primavera and PeopleSoft Program Management, a conflict that you create in Microsoft Project or Primavera will not automatically trigger the conflict warning indicator to appear on the Resources page when you access it. Therefore, if you are manipulating your project resources and activities in either of these third-party project management applications and integrating the data with PeopleSoft Program Management, it is recommended that you always click the Check for Conflicts button on the Resources page after you upload data from these other products.

Resources - Cost Tab

Unit of Measure

Select the unit of measure by which the resource's cost rate is quoted. For labor resources, hours are the only valid units of measure. Assets and material resources typically use *Each* as the unit of measure.

Rate Type

Select the method of determining the resource's cost per unit.

For assets and material resources, the only valid value is *Custom*, and you must specify the rate in the Rate field.

For labor resources, you can choose *Custom* to specify the rate, or you can select either *Proj Role* (Project Role), *Jobcode*, or *Employee* to obtain the standard rate that your organization has established for each of these options. If you choose any option other than Custom, the Rate field becomes view only and displays the appropriate standard rate.

Rate

The cost rate per unit that is applied to determine the total cost of the resource.

For asset and material resources, this is the monetary cost per unit. For labor resources, it is the cost per hour. If the resources standard rate is not defined as an amount per hour, the system converts it to a per hour rate for the Resources page.

Currency

Select the currency in which to quote the resource's Rate.

Project Budget Item

Select a budget classification for the resource.

Note. When you use this page to add resources to a project, the system automatically defaults most of the resource data onto the Resources by Activity page. Therefore, if you enter values for the project role, unit of measure, rate type, rate, currency, and budget items using this page, the system automatically populates the data for those values when you assign a resource to an activity by using the Resources by Activity page, enabling you to streamline resource deployments.

Resources - Links

Team Rates Click this link to access the Project Team Standard Rate Sheet page in PeopleSoft Project Costing, which displays cost and bill rates for resources on the project team.

Resource Chart Click this link to access the Schedule Chart page, which displays a Gantt chart that depicts scheduled resource usage. The Schedule Chart page is displayed as a new tab in the Resource component.

Project Estimate Summary Click this link to access the Project Estimate Summary page, where you can view a summary of activities and their associated work and cost estimates.

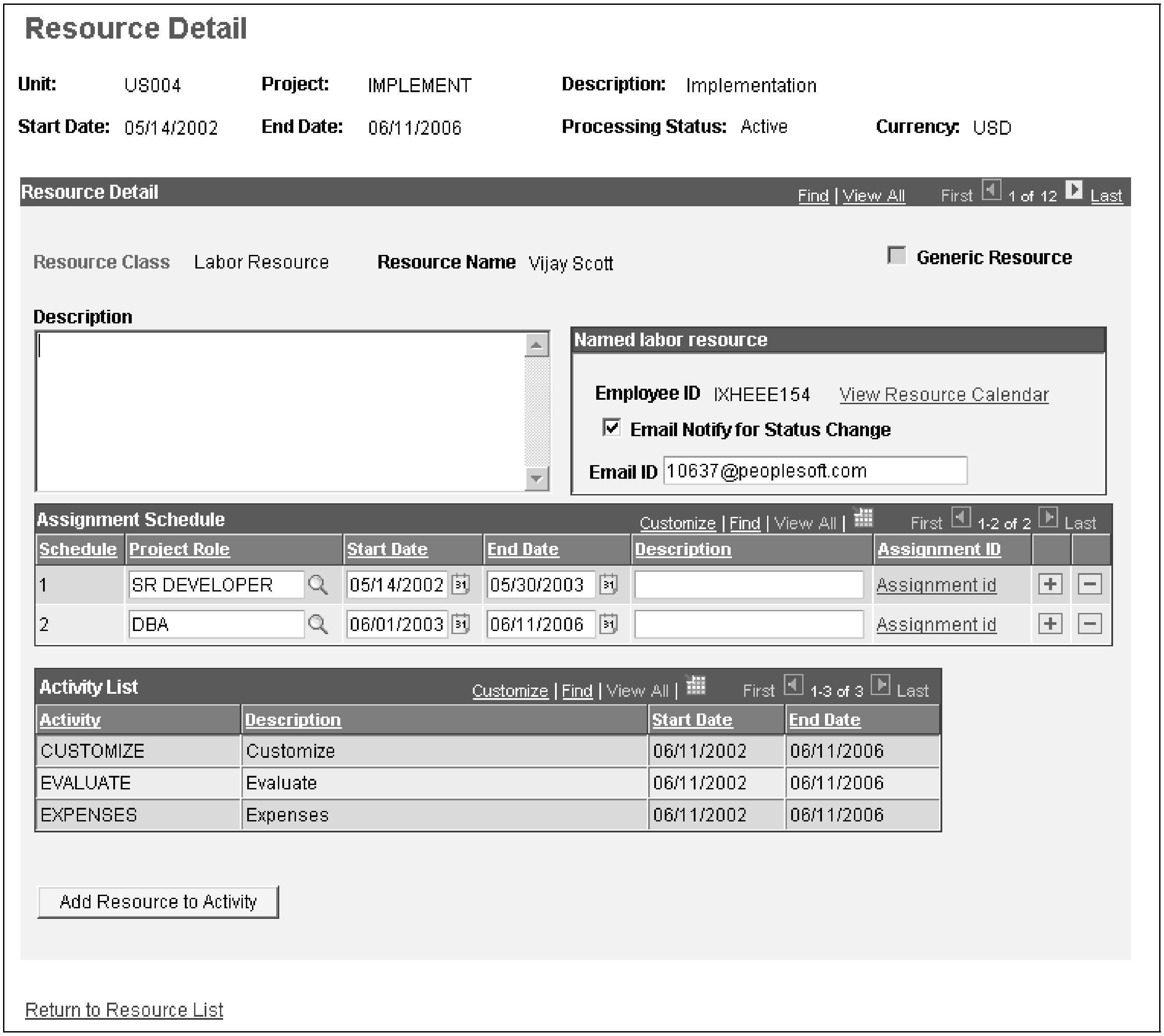
Manage Generic Resources Click this link to access the Manage Generic Resources page, where you can:

- Create and cancel resource requests in the PeopleSoft Resource Management application for the project’s generic resources
- Review what progress has been made toward filling the generic resource placeholders on a project with a labor resource who has an employee ID.

See *PeopleSoft Project Costing 8.8 PeopleBook,* “Pricing Project Costs”.

Working with Resource Details

Access the Resource Detail page.



Resource Detail

Unit: US004 **Project:** IMPLEMENT **Description:** Implementation

Start Date: 05/14/2002 **End Date:** 06/11/2006 **Processing Status:** Active **Currency:** USD

Resource Detail Find | View All First 1 of 12 Last

Resource Class Labor Resource **Resource Name** Vijay Scott ☐ **Generic Resource**

Description

Named labor resource

Employee ID IXHEEE154 View Resource Calendar

☑ **Email Notify for Status Change**

Email ID 10637@peoplesoft.com

Assignment Schedule Customize | Find | View All | First 1-2 of 2 Last

Schedule	Project Role	Start Date	End Date	Description	Assignment ID		
1	SR DEVELOPER	05/14/2002	05/30/2003		Assignment id	+	−
2	DBA	06/01/2003	06/11/2006		Assignment id	+	−

Activity List Customize | Find | View All | First 1-3 of 3 Last

Activity	Description	Start Date	End Date
CUSTOMIZE	Customize	06/11/2002	06/11/2006
EVALUATE	Evaluate	06/11/2002	06/11/2006
EXPENSES	Expenses	06/11/2002	06/11/2006

Add Resource to Activity

Return to Resource List

Resource Detail page

Resource Detail

Generic Resource If this option is selected, the resource is a labor resource for which a name has not yet been identified. For a generic resource, you cannot view the resource's calendar, and you will not be able to see schedule changes which are pending approval, because performing both of these tasks requires a resource's employee ID.

Named labor resource

This group box appears if the resource is a labor resource for which an employee has been identified.

View Resource Calendar Click this link to access the Monthly Schedule page in PeopleSoft Resource Management where you can view the named resource's assignments and appointments for the month.

	See *PeopleSoft Resource Management 8.8 PeopleBook*, “Maintaining Resource Schedules,” Viewing or Modifying Resource Schedules.
Email Notify for Status Change	If you are integrating with Microsoft Project, select this option to enable Microsoft Project to send email notifications about task status changes to the individual specified in the Email ID field. This field is not used by Program Management to send email notifications of task status changes.
Email ID	Enter the email address of the individual to notify, when the Email Notify for Status Change option is selected.

Assignment Schedule

This grid displays the resource’s scheduled commitments to the project; project managers can add and delete scheduling rows to extend or shorten a resource’s scheduled time on the project.

Click an Assignment ID to access the Assign Resource page in PeopleSoft Resource Management, where project managers can view and edit the details of the resource’s assignment.

If the project business unit requires management approval for new assignments or assignment date changes, then adding or modifying an assignment row triggers a PeopleSoft Workflow worklist approval item to the resource manager asking for approval of the assignment. Assignments that require approval appear in the Schedule Changes Pending Approval grid.

See *PeopleSoft Resource Management 8.8 PeopleBook*, “Assigning Resources,” Creating Assignments.

Schedule Changes Pending Approval

This grid only appears if the project business unit associated with the project has activated the assignment approval required feature or date change approval required feature in PeopleSoft Resource Management. The grid lists any schedule modifications made in the Assignment Schedule grid for assignments in an *Assigned* status that are awaiting resource manager authorization. Until the resource manager approves the assignment, the new or modified schedule rows are in a *Pending Approval* status on the assignment and are not editable on the Resource Detail page. The pending dates appear on the Resources page and on the assignment and resource’s schedule in PeopleSoft Resource Management.

The same assignment ID may appear more than once; this can occur when there is more than one Assignment Schedule Detail row for the same assignment. Separate assignment IDs indicate that a resource has been booked to the project by more than one assignment from PeopleSoft Resource Management. None of the assignment schedule date ranges can overlap.

If a new assignment is rejected, a warning indicator appears on the named resource row on the Resources page. If an assignment schedule change is rejected, the dates on the assignment, resource schedule, and project team revert to the original dates before the change.

Note. You can make assignment schedule changes directly in PeopleSoft Resource Management or using the Resource Detail page in PeopleSoft Program Management. However, the only scheduling changes that appear in the Schedule Changes Pending Approval grid are those made by using the Resource Detail page. For a complete list of assignments pending approval, please refer to the Assign Resources component (RS_ASSIGNMENT) in PeopleSoft Resource Management.

See *PeopleSoft Resource Management 8.8 PeopleBook*, “Assigning Resources,” Assigning Resources.

Activity List

This grid lists the project activities to which the resource is assigned.

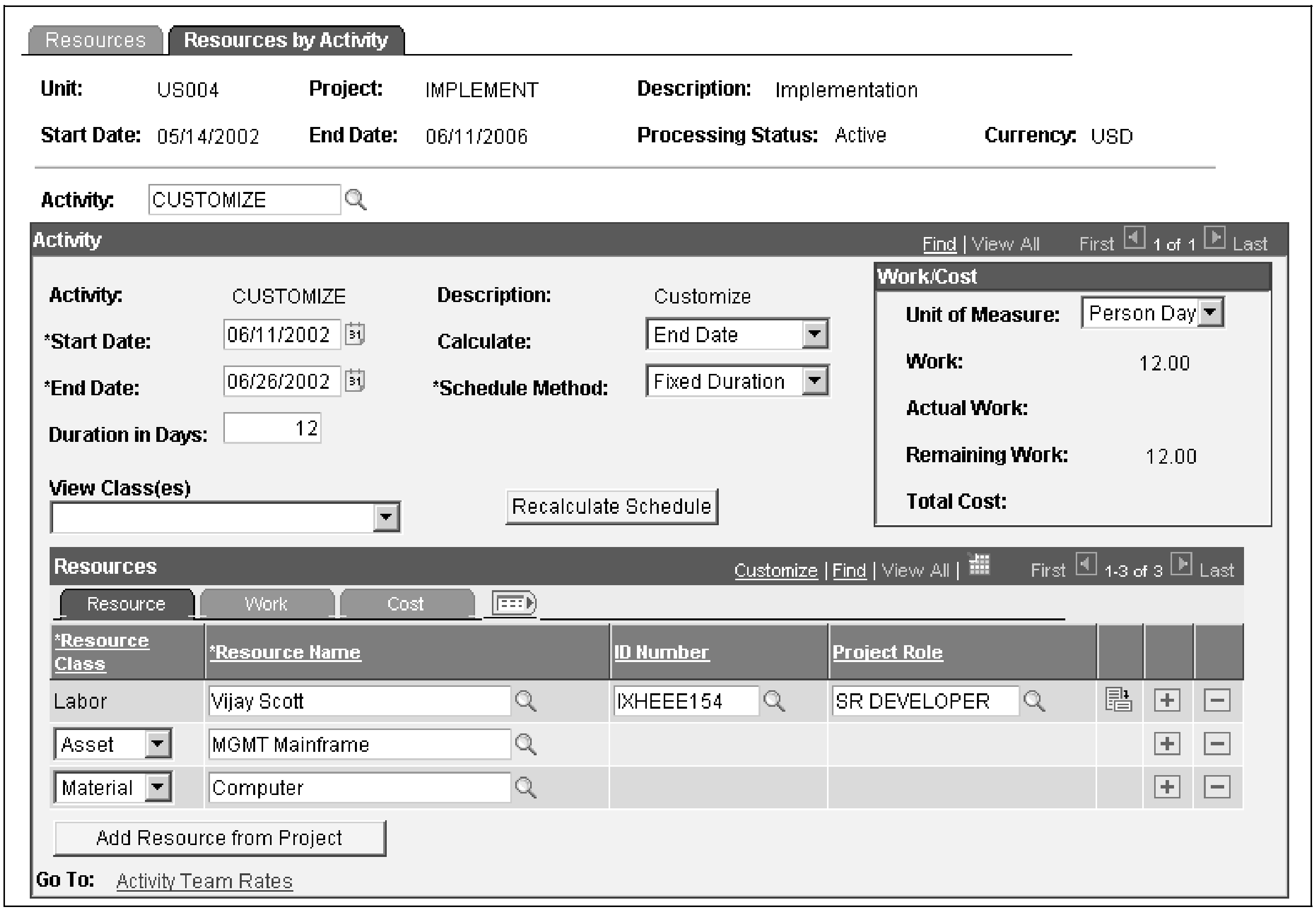
Adding Activities

Add Resource to Activity — Click this button to access the Select activities for resources/requirements page, where you can add the resource to activities.

Note. The activities you copy do not appear in the activity list grid until you save the component.

Defining Activity Resources

Access the Resources by Activity page.



Resources by Activity page

Activity — Select the activity for which to define or modify resources.

Activity

Calculate — Specify the basis on which the activity's schedule is calculated. Options are:

- *Duration:* Select to have the system calculate duration by using the start and end date.
- *End Date:* Select to have the system calculate the end date by using the start date and duration.
- *Start Date:* Select to have the system calculate the start date by using the duration and end date.

The option you select for each activity depends on what information you already know about that activity. For example, you may know that based on a service level agreement, an activity must start on a specific date. You might also know from experience that a resource can perform the activity in 35 days. Given that you know the start date and duration, you would set the Calculate field to *End Date,* so that you do not have to manually count days on a calendar to derive the end date of the activity.

Schedule Method

This field designates the method for calculating the variables involved in scheduling labor resources to an activity: work, duration, and units. The scheduling method determines which element of a schedule remains constant when any one of the scheduling variables (work, duration, or units) changes.

Select one of these options:

- *Fixed Duration*: when a schedule is calculated or recalculated, the variable that remains constant is the total amount of time, measured in days, in which assigned resources must complete the activity.
- *Fixed Units*: when a schedule is calculated or recalculated, the variable that remains constant is the number of resource units assigned to the activity.
- *Fixed Work*: when a schedule is calculated or recalculated, the variable that remains constant is the total amount of work, measured in hours, that assigned resources require to complete the activity.

Duration in Days

Enter the number of days in which assigned resources must complete the activity

View Class(es)

Select which resource class to view in the list of activities. Options are: *All, Asset Resource, Labor Resource*, or *Material Resource.*

Recalculate Schedule

Click this button after editing schedule-related fields in the component so that the system can use the new data to modify the activity schedule.

Work/Cost

Unit of Measure

Select the unit of measure in which to view the activity's work and cost information. Options are *Work Hour* or *Person Day.*

When the activity schedule is recalculated, the system updates the Work, Actual Work, Remaining Work, and Total Cost fields.

Resources - Resource Tab

Resource Class

This field indicates that the resource belongs to one of these categories:

- *Labor:* human resource.
- *Material:* consumable resource. For example, lumber is a material resource.
- *Asset:* non-human resource. For example, a computer is an asset resource.

Resource Name
For asset or material resources, enter the description of an asset or material. For labor resources that are employees, enter the name of the resource. To assign a generic, unnamed labor resource, enter the description of the generic resource, such as Technician 1 or Project Manager.

ID Number
Select a unique identifier for the resource. This field is applicable only to labor resources and will automatically populate with the employee's ID when it is entered in the Resource Name field.

Project Role
Select the job function that the resource is to perform for the activity. This field applies only to labor resources.

Resources - Work Tab

Unit of Measure
Select the unit of measure by which the resource's cost rate is quoted. For labor resources, hours are the only valid units of measure. Assets and material resources typically use *Each* as the unit of measure.

Units
For asset and material resources, units indicates a count of the item in terms of the unit of measure. For example, if you have a material called "Bolts", and you enter "bushels" in the Unit of Measure field and 5 in the Units field, you are indicating that the activity requires 5 bushels of bolts.

For labor resources, the Units field represents a percentage of a work day, and should be interpreted as the resource's percent effort on the activity. When you add a resource, the Units field value is automatically set to 100, indicating that the resource is expected to work full time for the duration of the activity between the start and end dates. Adjust the number up or down to indicate that a resource will work more or less than full time on the activity.

Work
The total number of hours that a resource is expected to participate in the selected activity. This field is available for labor resources only. When you first add a labor resource to an activity, the system determines the value for this field by:

1. Converting the duration of the activity in days to business hours according to the project's standard work hours per day setting.
2. Obtaining the resource's units, which default to 100 percent, and converting that to a decimal value.
3. Multiplying the value of Duration times the value of Units to obtain the value of Work in hours.

As each new labor resource is added, the system sums the value of remaining work from the other resources, distributes the summed value proportionally between the original resources and the new resource, and sets the new resource's work value equal to its remaining work value.

Actual Work The number of hours that a resource has actually worked. This is a display-only field, and is relevant only to labor resources. The values in this field reflect any actual hours from any subsystem that loads to the PROJ_RESOURCE table.

Note. If you are using the PeopleSoft Program Management integration with Microsoft Project, the Actual Work figure which can be entered in Microsoft Project is not permitted to upload to your PeopleSoft system.

Remaining Work This is a display-only field, and is relevant only to labor resources. The system determines its value for a given labor resource by subtracting the value of actual work from the value of work.

As each new labor resource is added, the system sums the value of remaining work from the other resources, distributes the summed value proportionally between the original resource(s) and the new resource, and sets the new resource's work value equal to its remaining work value.

Baseline Work Enter the number of hours that you expect the activity to require. As your project progresses, you can compare this to your actual work to determine how accurate your original baseline estimate was.

Resources - Cost Tab

Rate Type Select the method of determining the resource's cost per unit.

For assets and material resources, the only valid value is *Custom*, and you must specify the cost per unit in the Rate field.

For labor resources, you can choose *Custom* to specify the rate, or you can select either *Proj Role* (Project Role), *Jobcode,* or *Employee* to obtain the standard rate that your organization has established for each of these options. If you choose any option other than *Custom,* the Rate field becomes view only and displays the appropriate standard rate.

Rate The cost rate per unit that is applied to determine the total cost of the resource.

For asset and material resources, this is the monetary cost per unit. For labor resources, it is the cost per hour.

Currency Select the currency in which you are quoting the resource's rate.

Budget Item Select a budget classification for the resource. This classification determines the general ledger account to which expenses related to this resource will be charged.

Note. Although you are not required to enter the budget item for each resource you assign to an activity, it is strongly recommended. Having a budget item associated with each resource will allow you to automatically load the cost of project resources to an appropriate account in PeopleSoft Project Costing's project budgeting system, and PeopleSoft Program Management's and PeopleSoft Project Portfolio Management's project request Costs page. (During setup of your system, you establish budget items, which includes assigning a general ledger account to each one.) If a project manager builds a project estimate with the Resources by Activity page and does not enter budget items for the resources, costs will load to project budgets and project requests with all costs summed into one number, which will limit visibility into cost detail for users of the project budgets and project requests.

Cost — This is a display-only field, and displays the cost of the resource based upon other data that has been entered. For assets and materials, the cost is determined by multiplying the rate by the units. For labor resources, the system generates cost by multiplying the rate times the hours specified in the Work field.

Additional Page Elements

Add Resource from Project — Click this button to access the Assign Resources from Project page, which lists the available project resources that can be assigned to the activity. The page is displayed as a new tab in the Resource component.

Activity Team Rates — Click this link to access the Activity Team Standard Rate Sheet page in PeopleSoft Project Costing, which displays cost and bill rates for the resources on the activity.

See Also

Chapter 6, "Scheduling and Managing Resources," Understanding Resource Tools, page 65

Working with Generic Resources

Access the Manage Generic Resources page.

Manage Generic Resources page

Click to expand all generic resources and their associated assignment data.

Click to collapse all generic resources and their associated assignment data.

Select the check box next to each generic resource for which to generate or cancel a service order resource request. The system creates or cancels resource requests for only the selected generic resources.

Expand the Assignments section to view all assignments found for the generic resource on the project resource list that are not yet assigned or reserved.

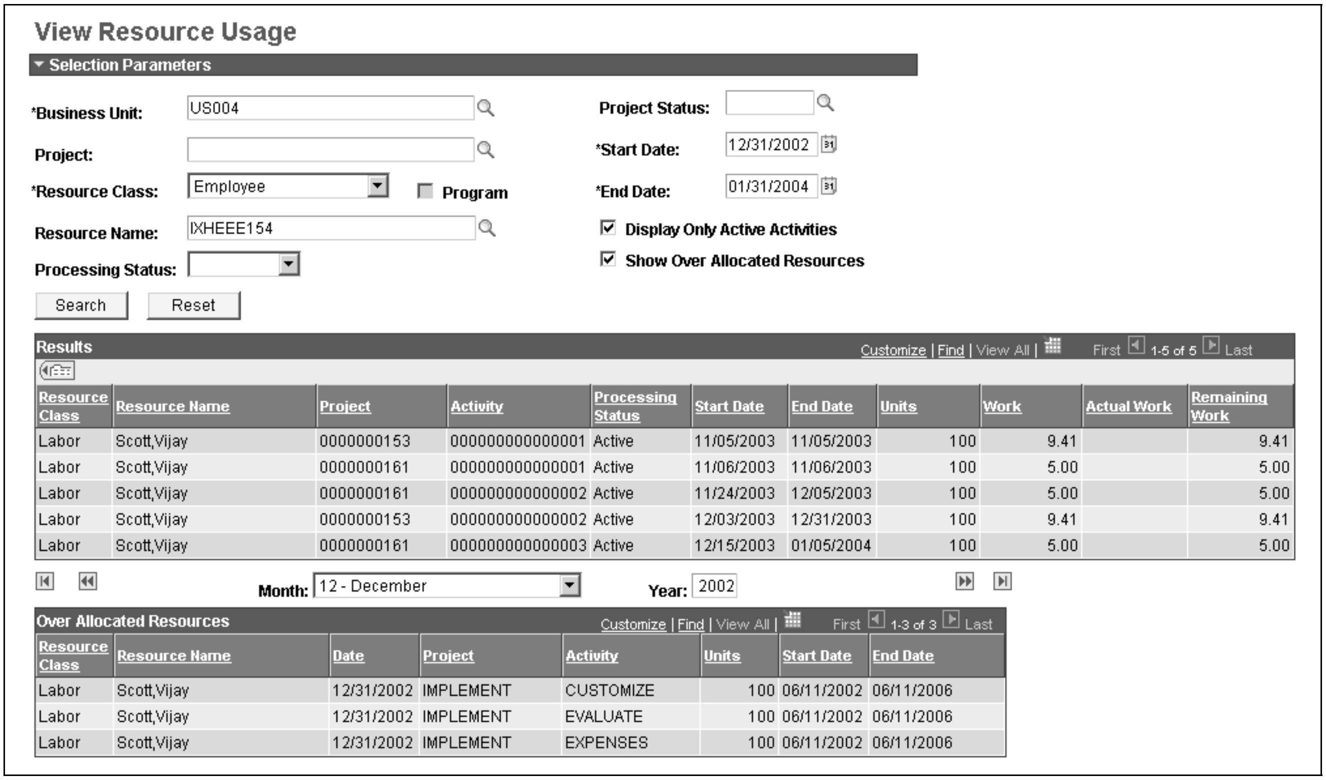
Create Resource Request Click to create new resource requests for the selected generic resource.

Cancel Resource Request Click this button to cancel any open resource requests for the selected generic resource.

Note. Once a resource request is created for a generic resource, the generic resource data on the Resources page changes to display-only, and the Express Search button is no longer available.

Viewing Resource Usage

Access the View Resource Usage page.



View Resource Usage page

This page enables project managers to review resource assignments for a specified date range, and see if there are any overscheduled resources during those dates. Use this page to determine:

- The resources on the project's active activities and how the resources are allocated.
- What activities a given resource is performing within a project.
- What activities a given resource is performing across the enterprise.
- All of the resources that are working within a program and to which activities are they assigned.
- Which resources are overallocated, and when.

Selection Parameters

Enter the search criteria by which to view activities, then click the Search button to display the results. Use these fields to filter the projects you want to display on the Results grid.

If you enter a project in the search criteria, the system retrieves data for that single project only. If a you enter a program, the page retrieves data for all projects in that program according to the enterprise program tree.

The Over Allocated Resources grid appears only if the Show Over Allocated Resources check box is selected. The Over Allocated grid shows, by month, all resources that are over allocated.

Results

This grid displays the search results, and lists activities and associated work details for labor resources. For asset resources, no work details are shown, however, you can see activities which use an asset. Material resources do not appear on this page.

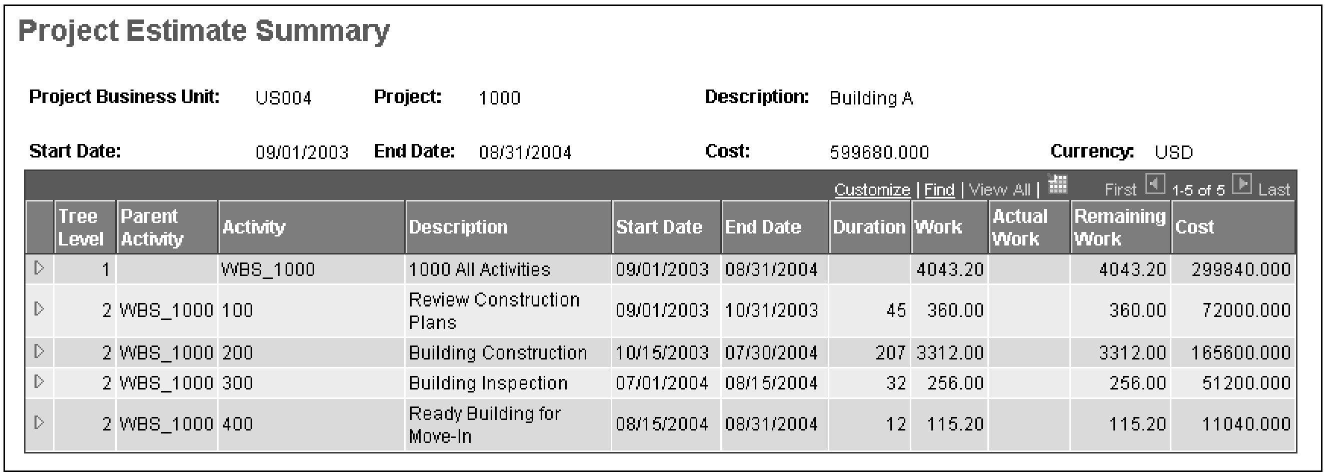
Over Allocated Resources

This grid lists resources that are scheduled more than 100% of a standard workday, and the dates and activities for which that resource is overallocated.

Change the month and year to specify the time period for which to view overallocated resources.

Viewing Project Estimates

Access the Project Estimate Summary page.


Project Estimate Summary

Project Business Unit: US004 Project: 1000 Description: Building A

Start Date: 09/01/2003 End Date: 08/31/2004 Cost: 599680.000 Currency: USD

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

	Tree Level	Parent Activity	Activity	Description	Start Date	End Date	Duration	Work	Actual Work	Remaining Work	Cost
▷	1		WBS_1000	1000 All Activities	09/01/2003	08/31/2004		4043.20		4043.20	299840.000
▷	2	WBS_1000	100	Review Construction Plans	09/01/2003	10/31/2003	45	360.00		360.00	72000.000
▷	2	WBS_1000	200	Building Construction	10/15/2003	07/30/2004	207	3312.00		3312.00	165600.000
▷	2	WBS_1000	300	Building Inspection	07/01/2004	08/15/2004	32	256.00		256.00	51200.000
▷	2	WBS_1000	400	Ready Building for Move-In	08/15/2004	08/31/2004	12	115.20		115.20	11040.000

Project Estimate Summary page

This grid lists the activities that comprise the project and displays the associated work and cost estimates for each activity. This page enables you to review at a glance all of a project's activities and the resources assigned to each activity.

 Click to view details of the resources assigned to the activity.

Analyzing Resource Lists

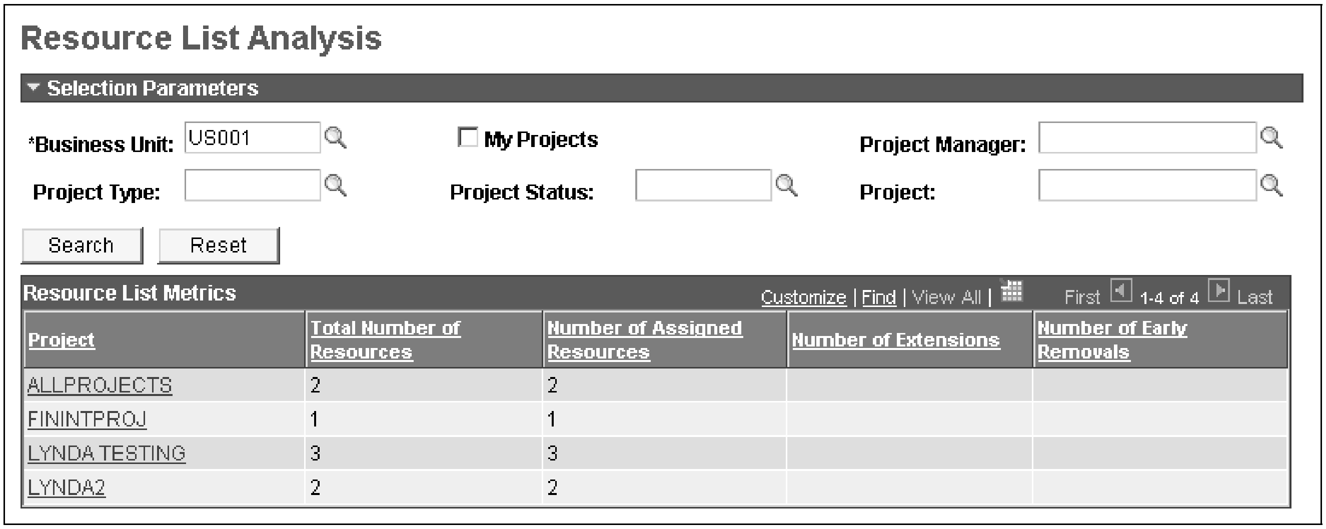
This section discusses how to display a resource list that can be used to help make decisions about staffing the enterprise's projects.

Page Used to Analyze Resource Lists

Page Name	Object Name	Navigation	Usage
Resource List Analysis	PC_EA_RESOURC_LIST	Program Management, Interactive Reports, Resource List	Uses search criteria to display resource statistics about the projects meeting the criteria.

Analyzing a Resource List

Access the Resource List Analysis page.



Resource List Analysis page

Enter the necessary search criteria to filter projects. Click the Search button for the system to retrieve and display a list of projects and their resource statistics. Click the Reset button to reinstate the page's default values.

Project	Click a link in this column to access the project's Resources page to view and edit resource details.
Total Number of Resources	Total number of labor resources on the project's team, including assigned, unassigned, past, and present team members.
Number of Named Resources	Number of resources who have been identified by employee ID. Generic resources are not included in this total.
Number of Extensions	Number of times that resources have been extended beyond their original end dates in PeopleSoft Resource Management.
Number of Early Removals	Number of times that resources have been removed earlier than their original end dates in PeopleSoft Resource Management. If the same employee is removed early more than once, each removal is counted.

Viewing the Resource Workbench

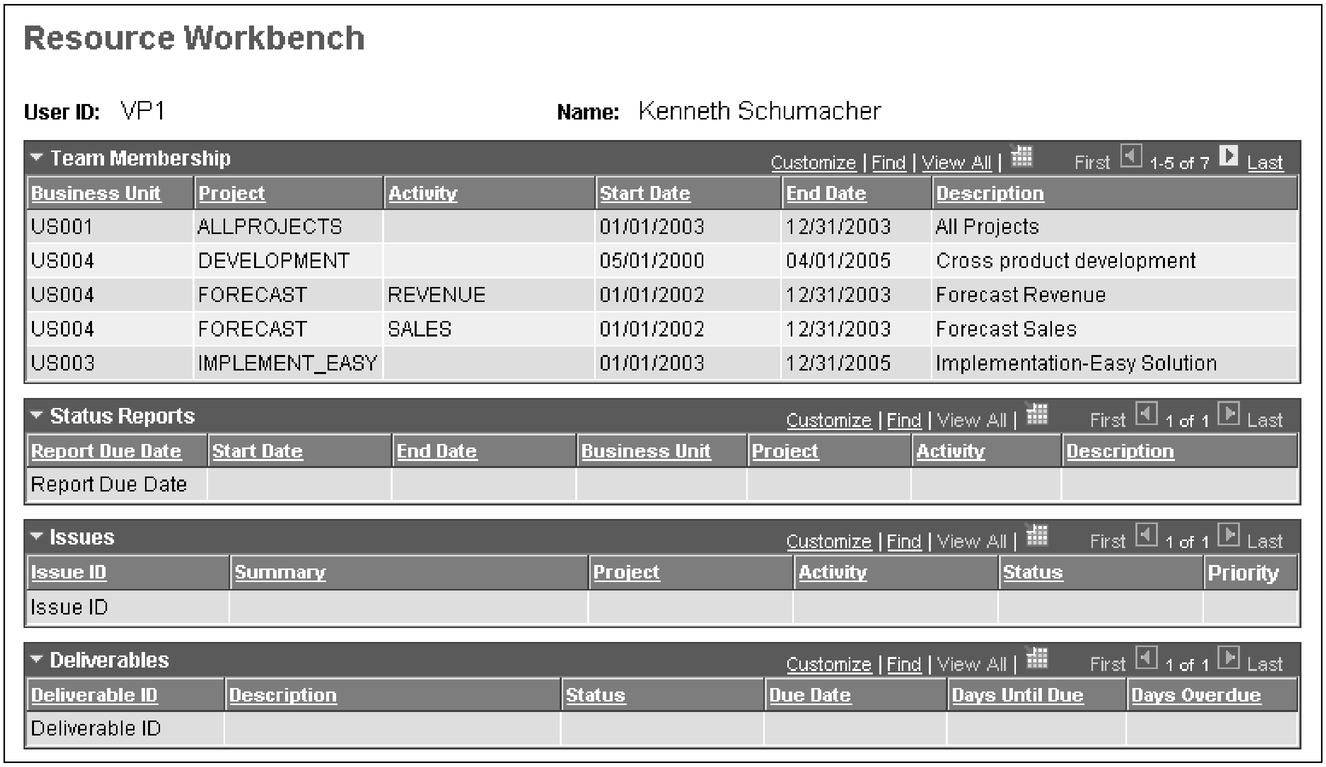
This section discusses how to use the Resource Workbench page, which summarizes the status reports, issues, and deliverables assigned to an individual resource.

Page Used to View the Resource Workbench

Page Name	Object Name	Navigation	Usage
Resource Workbench	PC_RSRC_WKBNCH	Program Management, Project Management, Resource Workbench	View a summary of an individual resource's involvement with one or more projects.

Viewing the Resource Workbench

Access the Resource Workbench page.



Resource Workbench

User ID: VP1 Name: Kenneth Schumacher

Team Membership — Customize | Find | View All | First 1-5 of 7 Last

Business Unit	Project	Activity	Start Date	End Date	Description
US001	ALLPROJECTS		01/01/2003	12/31/2003	All Projects
US004	DEVELOPMENT		05/01/2000	04/01/2005	Cross product development
US004	FORECAST	REVENUE	01/01/2002	12/31/2003	Forecast Revenue
US004	FORECAST	SALES	01/01/2002	12/31/2003	Forecast Sales
US003	IMPLEMENT_EASY		01/01/2003	12/31/2005	Implementation-Easy Solution

Status Reports — Customize | Find | View All | First 1 of 1 Last

Report Due Date	Start Date	End Date	Business Unit	Project	Activity	Description
Report Due Date						

Issues — Customize | Find | View All | First 1 of 1 Last

Issue ID	Summary	Project	Activity	Status	Priority
Issue ID					

Deliverables — Customize | Find | View All | First 1 of 1 Last

Deliverable ID	Description	Status	Due Date	Days Until Due	Days Overdue
Deliverable ID					

Resource Workbench page

This page displays a list of project and activity teams on which the resource is a team member. If there are any status reports, issues, or deliverables assigned to the resource, these are also listed. Click a link in the appropriate column to display the details of a status report, issue, or deliverable. There is no search record prompt to access the page, as it only shows data about the user who logs on and navigates to the page.

CHAPTER 7

Managing Program and Project Issues

This chapter provides an overview of issues and discusses how to:

- Define issue priorities, statuses, and types.
- Enter issues.
- Review, update, and resolve issues.
- Generate issue reports.
- Send emails.

Understanding Issues

During project delivery, a critical factor in determining success is the reporting, escalation, management, and resolution of issues. To ensure a high probability for customer satisfaction and a successful project, issues must be documented, communicated, and prioritized.

Defining Issue Priorities, Statuses, and Types

To define issue priorities, statuses and types, use the Issue Priorities (PC_IM_PRIORITY), Issue Status (PC_IM_STATUS), and Issue Types (PC_IM_TYPE) components. This section discusses how to:

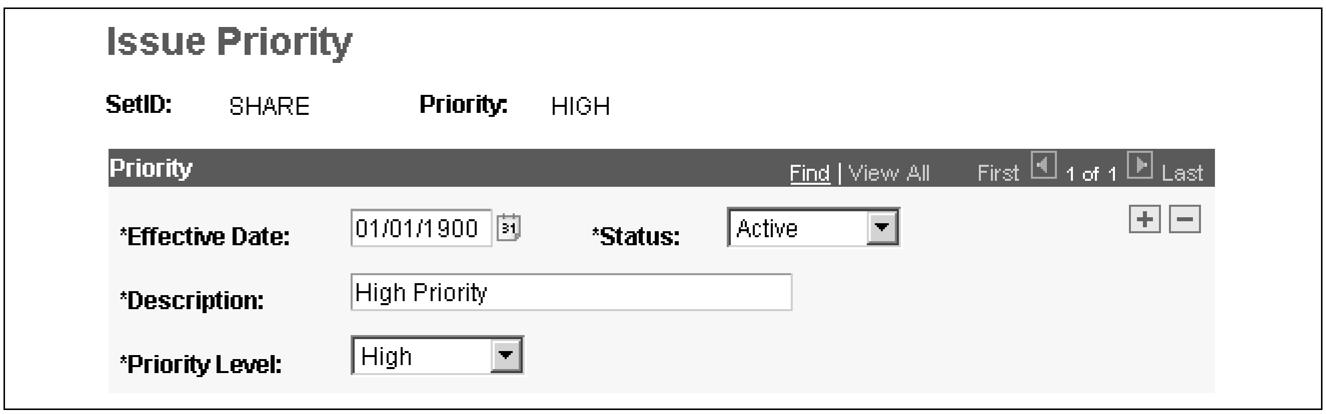
- Define issue priorities.
- Define issue statuses.
- Define issue types.

Pages Used to Define Issue Priorities, Statuses, and Types

Page Name	Object Name	Navigation	Usage
Issue Priority	PC_IM_PRIORITY	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Priorities	Define priorities that are applied to project issues for classification.
Issue Status	PC_IM_STATUS	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Status	Define statuses that are applied to project issues for classification.
Issue Type	PC_IM_TYPE	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Types	Define issue types that are used for classification.

Defining Issue Priorities

Access the Issue Priority page.



Issue Priority page

Select a value of *High*, *Medium*, or *Low* for the priority that is being defined. These priorities become available for selection when an issue is entered or edited by using the Issue page.

Issue priorities are represented by colored visual indicators when issues are displayed on pagelets:

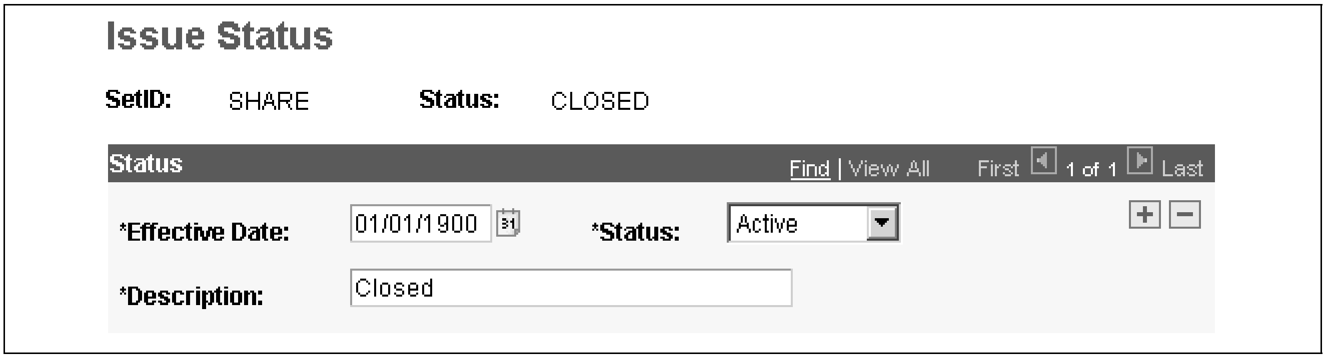
Red Indicator	The system displays this symbol when the selected priority for an issue is mapped to the priority level *High*.
Yellow Indicator	The system displays this symbol when the selected priority for an issue is mapped to the priority level *Medium*.
Green Indicator	The system displays this symbol when the selected priority for an issue is mapped to the priority level *Low*.

See Also

PeopleSoft Financials Portal Pack 8.8 and Enterprise Service Automation Portal Pack 8.8 PeopleBook, "Using Pagelets Enabled by PeopleSoft Program Management"

Defining Issue Statuses

Access the Issue Status page.

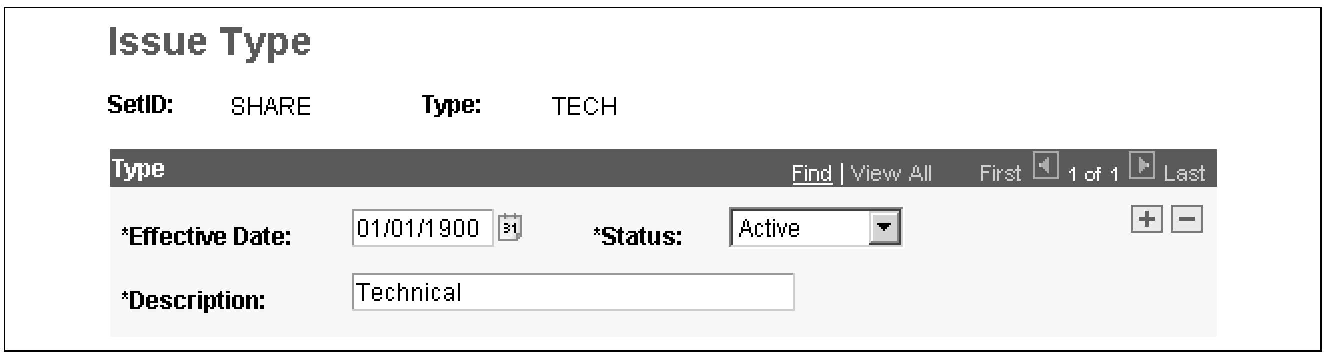


Issue Status page

The statuses defined on this page become available for selection when you enter or edit an issue by using the Issue page.

Defining Issue Types

Access the Issue Type page.



Issue Type page

The issue types defined on this page become available for selection when you enter or edit an issue by using the Issue page.

Entering Issues

This section discusses how to:

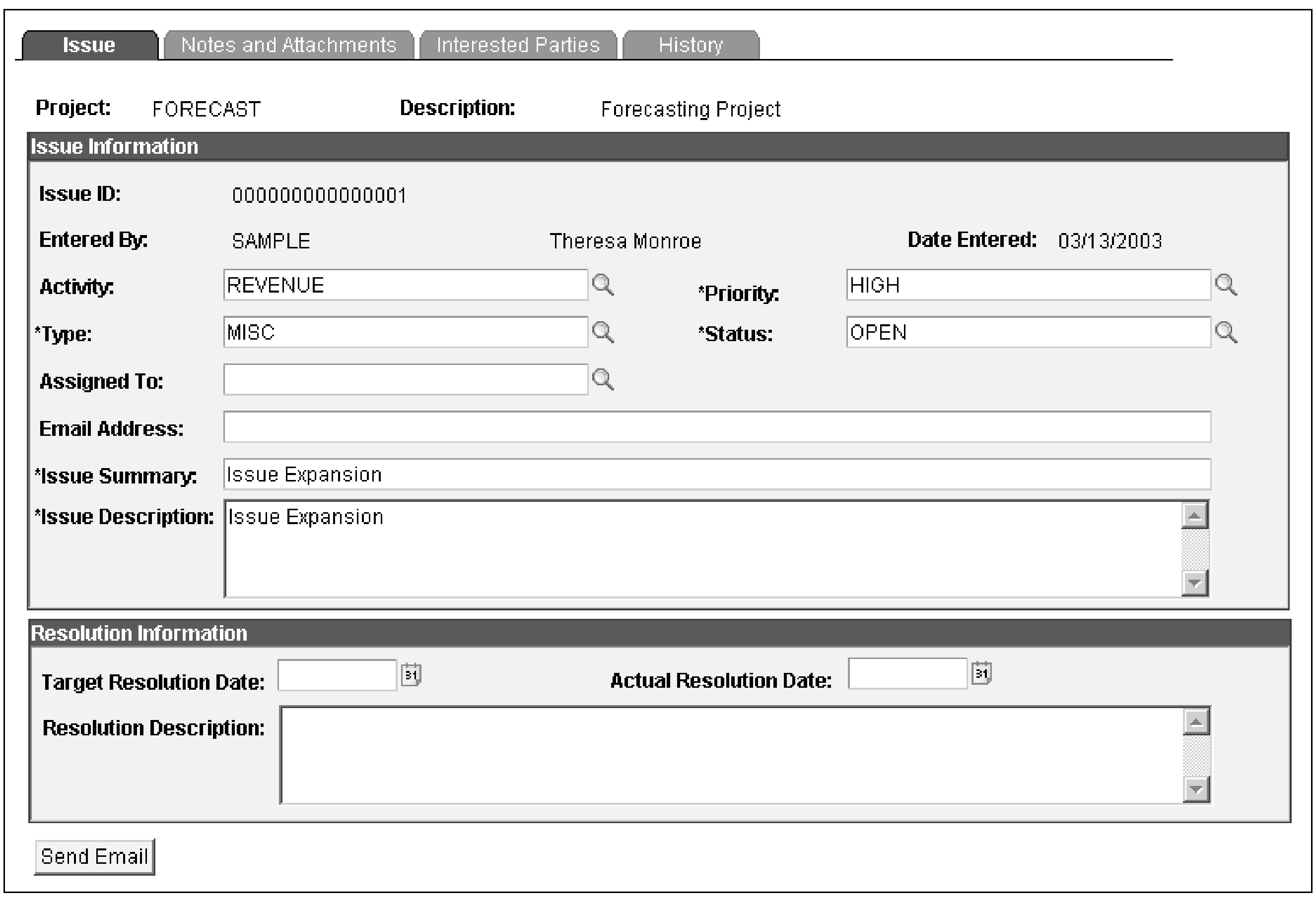
- Create a project issue.
- Work with issue notes and attachments.
- Work with interested parties.
- View an issue's history.

Pages Used to Enter Issues

Page Name	Object Name	Navigation	Usage
Issue	PC_IM_ISSUE	Program Management, Project Management, Add/Update Issues, Issue	Create, review, or edit issue information.
Notes and Attachments	PC_IM_NOTES	Program Management, Project Management, Add/Update Issues, Notes and Attachments	View and edit file attachments or comments that are relevant to an issue.
Interested Parties	PC_IM_INT_PRTY	Program Management, Project Management, Add/Update Issues, Interested Parties	Add or delete the names of people who want to be informed and updated about a particular issue.
History	PC_IM_HISTORY	Program Management, Project Management, Add/Update Issues, History	View the record of updates made to a particular issue.

Creating Project Issues

Access the Issue page.



Issue page

Enter the necessary information that is applicable to this issue. The choices for the Priority, Type, and Status fields are user-defined.

Assigned To Select an employee ID from a list or enter a name.

Email Address If the name in the Assigned To field is from the employee list, this field is automatically populated. If there is no email address available, an email address must be entered before the issue can be saved.

Target Resolution Date Specify the target date for resolving the issue. This is not a required field.

Resolution Date When appropriate, specify the date the issue is resolved.

Send Email Click to access the Send Email page, where you can compose and send emails that pertain to this specific issue.

See Also

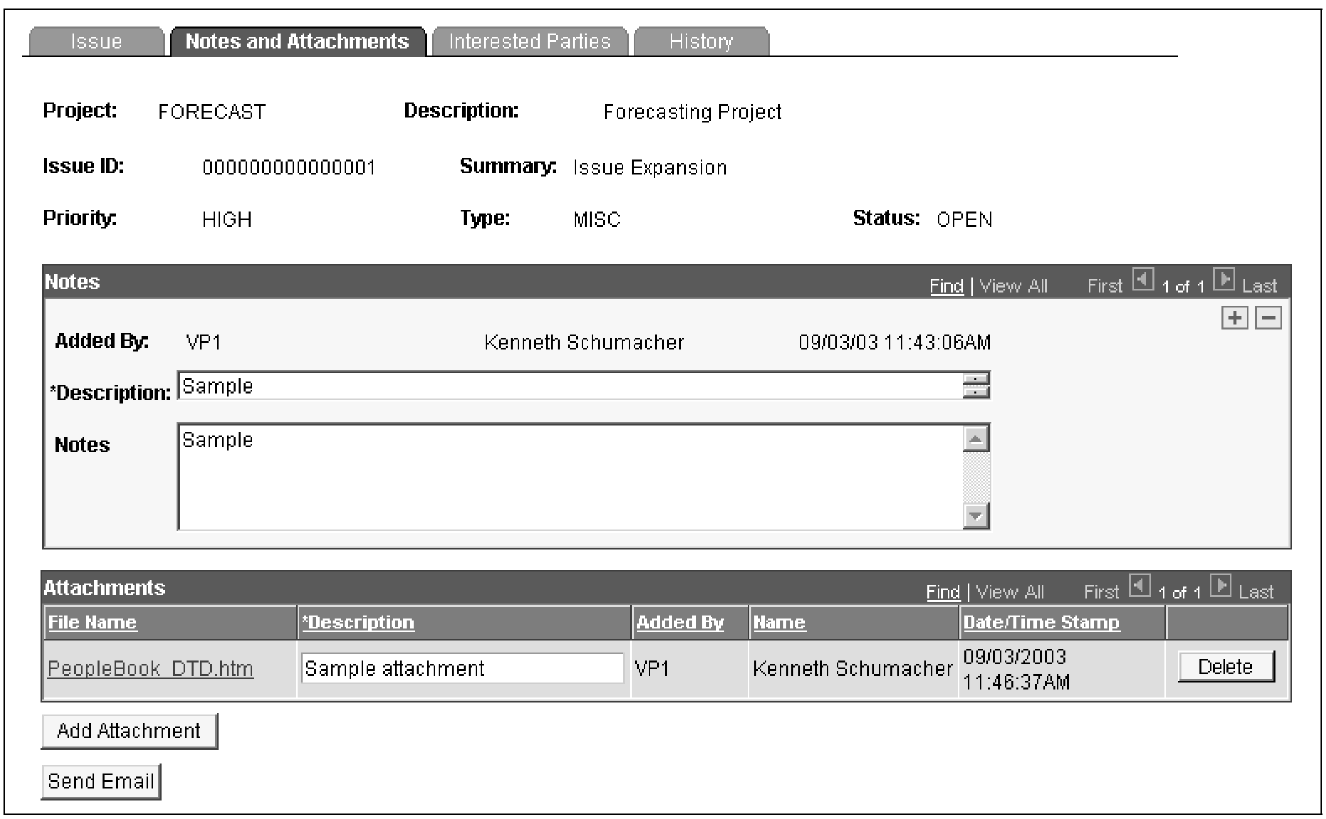
Chapter 7, "Managing Program and Project Issues," Defining Issue Priorities, Statuses, and Types, page 87

Chapter 7, "Managing Program and Project Issues," Reviewing, Updating, and Resolving Issues, page 93

Chapter 7, "Managing Program and Project Issues," Sending Emails, page 95

Working with Issue Notes and Attachments

Access the Notes and Attachments page.



Notes and Attachments page

If the user enters any notes, a description must be entered in the Notes section before the issue can be saved.

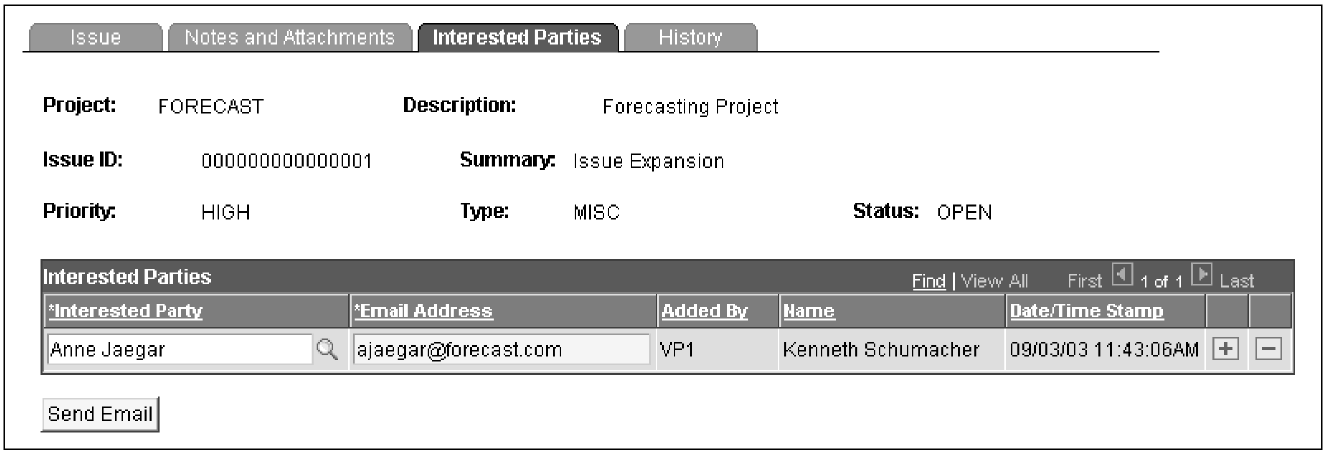
To add an attachment, click the Add Attachment button in the Attachments section. When the file is uploaded, the file name appears in the File Name column, and the system displays the user ID of the person that added the attachment in the Added By column. Attachments require a description before the issue can be saved.

See Also

Chapter 7, "Managing Program and Project Issues," Sending Emails, page 95

Working with Interested Parties

Access the Interested Parties page.



Interested Parties page

Interested Party Select an employee ID from the list of employees or enter a name that is not from the list.

Email Address This field is automatically populated when an Interested Party is selected from the employee list. If an email address is not available, an email address must be entered before the issue can be saved.

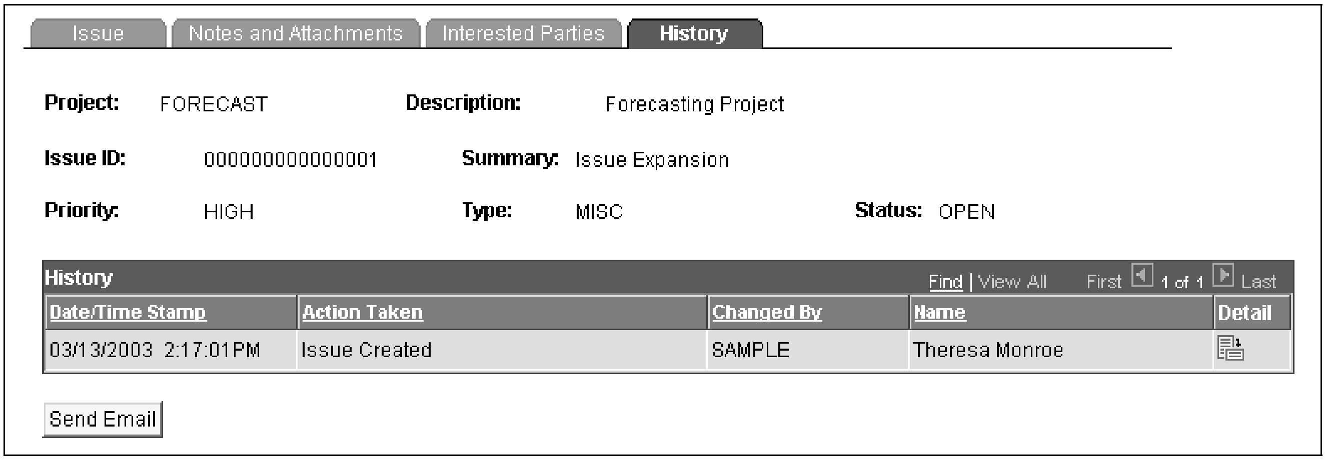
When an Interested Party is selected, the system displays the user ID that added the interested party in the Added By column.

See Also

Chapter 7, "Managing Program and Project Issues," Sending Emails, page 95

Viewing an Issue's History

Access the History page.



History page

This page records actions that are performed on the issue and the user ID that performed the update. Actions are listed with the most recent update at the top of the History section, which tracks these types of actions:

- Issue created.
- Priority changed.
- Status changed.
- Type changed.
- Activity changed.
- Assignment changed.
- Note(s) added.
- Attachment(s) added.

Click to access the appropriate page where the update action occurred.

Reviewing, Updating, and Resolving Issues

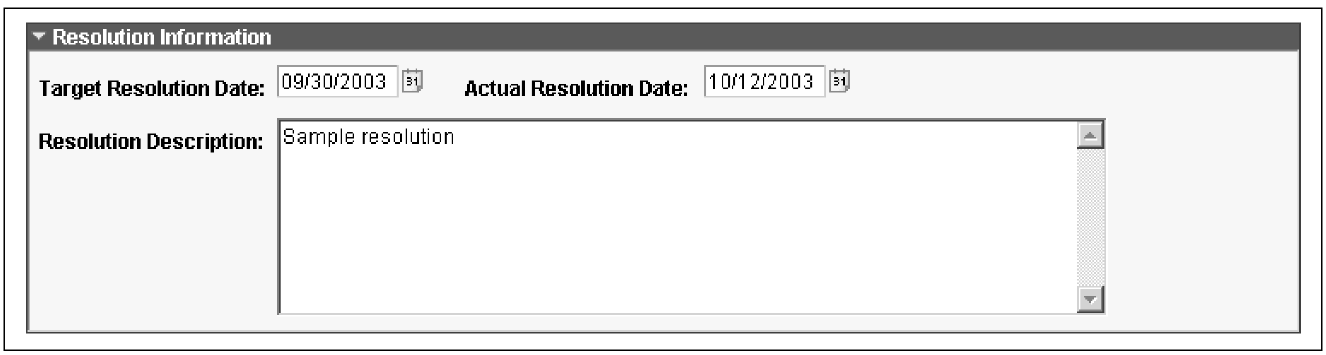
This section discusses how to review, update, and resolve an issue.

Pages Used to Review, Update, and Resolve Issues

Page Name	Object Name	Navigation	Usage
Issue	PC_IM_ISSUE	Program Management, Project Management, Add/Update Issues	Review and update issue information.
Notes and Attachments	PC_IM_NOTES	Program Management, Project Management, Add/Update Issues, Notes and Attachments	View and edit file attachments or comments that are relevant to an issue.
Interested Parties	PC_IM_INT_PRTY	Program Management, Project Management, Add/Update Issues, Interested Parties	Add or delete the names of people who want to be informed and updated about a particular issue.

Updating and Resolving an Issue

Access the Issue Management component (PC_IM_ISSUE) to edit any aspect of a project issue—description, priority, type, status, notes and attachments, or interested parties.



Issue page - Resolution Information

To resolve an issue, use the Issue page to select the appropriate resolution status. In the Resolution Information section, select an actual resolution date and enter a resolution description.

Note. Regardless of the issue's status, an issue is considered "open," until a value is entered in the Actual Resolution Date field. For example, if the issue status indicates that the issue is completed or closed, the issue remains open if there is no actual resolution date. Open issues appear in management reports as project indicators, so it is important to enter a resolution date when an issue is resolved.

See Also

Chapter 7, "Managing Program and Project Issues," Entering Issues, page 89

Generating Issue Reports

This section discusses how to generate the issue reports that are delivered with the system.

See Also

Appendix C, "PeopleSoft Program Management Reports," page 141

Pages Used to Generate Issue Reports

Page Name	Object Name	Navigation	Usage
Issues by Assigned To	RUN_PCY5065	Program Management, Reports, Issue, By Assigned To	Generate a report that lists issues by the person to whom they are assigned.
Issues by Priority	RUN_PCY5070	Program Management, Reports, Issue, By Priority	Generate a report that lists issues by priority.
Issues by Type	RUN_PCY5075	Program Management, Reports, Issue, By Type	Generate a report that lists issues by type.
Issues by Status	RUN_PCY5080	Program Management, Reports, Issue, By Status	Generate a report that lists issues by status.
Issues by Project/Activity	RUN_PCY5085	Program Management, Reports, Issue, By Project/Activity	Generate a report that lists issues by project and activity.
Issue Details	RUN_PCY5090	Program Management, Reports, Issue, Details	Generate a report that lists details for an issue.

Generating Issue Reports

To generate an issue report:

1. Access the appropriate issue report run control page.

   See Chapter 7, "Managing Program and Project Issues," Pages Used to Generate Issue Reports, page 95.
2. Complete the report parameters.
3. Click Run to generate the report.

Sending Emails

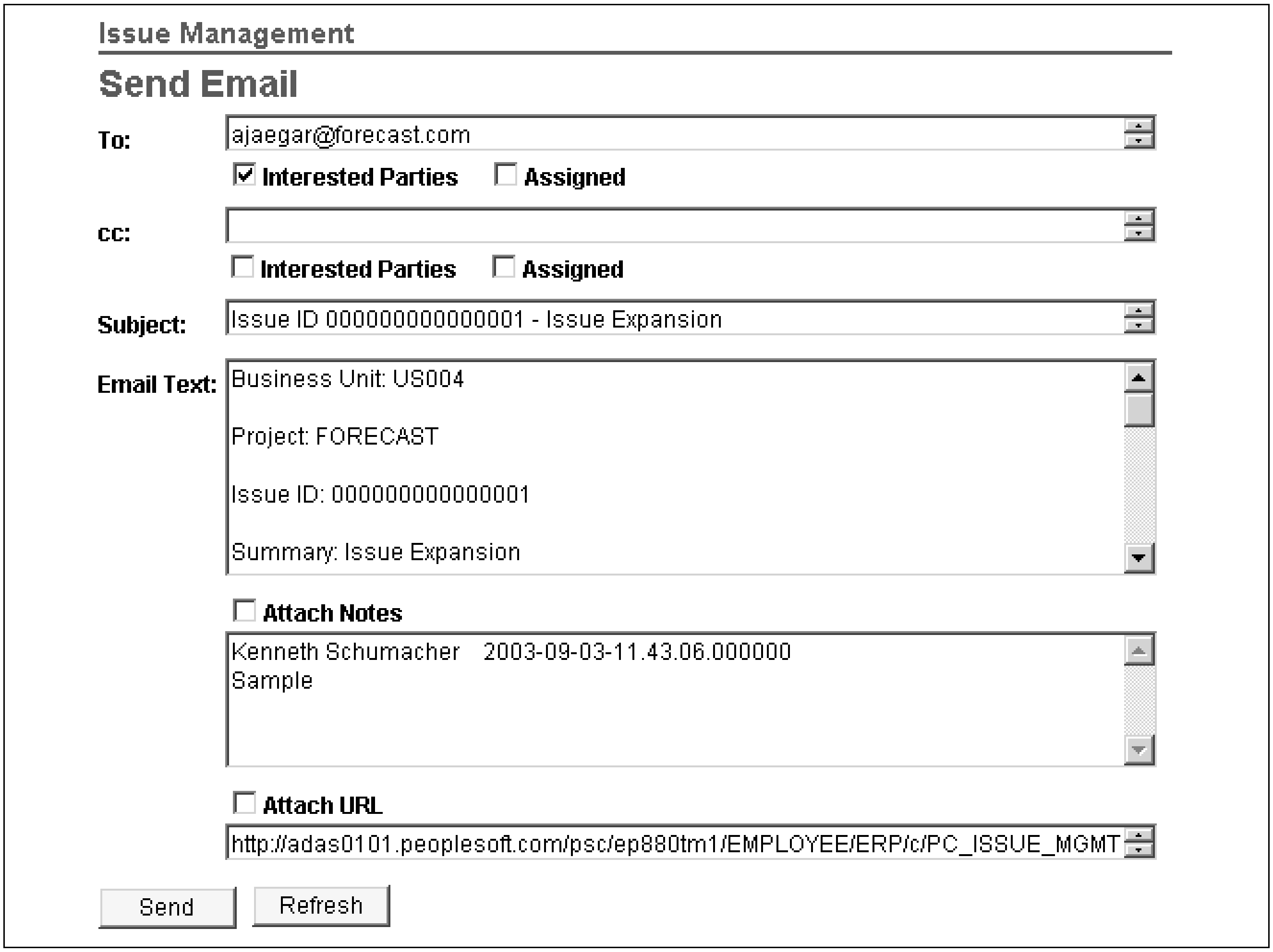
This section discusses how to send an email about a specific issue.

Page Used to Send Emails

Page Name	Object Name	Navigation	Usage
Send Email	PC_IM_EMAIL	Click the Send Email button on the Issue Management component pages.	Send an email that is pre-populated with data about a specific issue.

Sending an Email About an Issue

Access the Send Email page.



Send Email page

To and **CC**

Enter one or more email addresses. Separate multiple addresses by using semicolons.

Interested Parties

Selecting this check box populates the To or CC fields with email addresses from the Interested Parties page. Click the Refresh button to display the email addresses. Clear the check box to remove interested party addresses from the To or CC fields.

Assigned

If the issue is assigned, select this check box to populate the To or CC fields with the email address of the assignee from the Issue page. Click the Refresh button to display the email address. Clear the check box to remove the assignee’s address from the To or CC fields.

Subject

This field is automatically populated with the issue ID and summary that is entered on the Issue Management component.

Email Text

This field is populated with the following data from the selected issue:

- Projects Business Unit.
- Project ID.
- Issue ID.
- Issue Summary
- Entered By.
- Date Entered.
- Activity.
- Priority.
- Type.
- Status.
- Assigned To.
- Assignee’s Email Address.
- Target Resolution Date.
- Actual Resolution Date.
- Resolution Description.

Attach Notes If there are notes for the issue, this field is populated with the note text. Select the check box to include notes in the email.

Attach URL This field is populated with a URL that links to the issue. Select the check box to include the URL in the email.

CHAPTER 8

Maintaining Project Status

Status reporting is critical for communication within the project team and to the project's customer. Status reports provide visibility into the state of the project and give managers the necessary tools to gain insight and take action to ensure the successful delivery of a project.

This chapter discusses how to:

- Define status reports.
- Enter status reports.
- Review status reports.

Defining Status Reports

Project managers have the flexibility to designate how often they want to generate status reports. By setting up reporting periods, a manager determines when a status report begins and ends and whether reports are required at the project or activity levels.

This section discusses how to:

- Define status report frequency.
- Specify user report due dates.
- Determine status report dates.

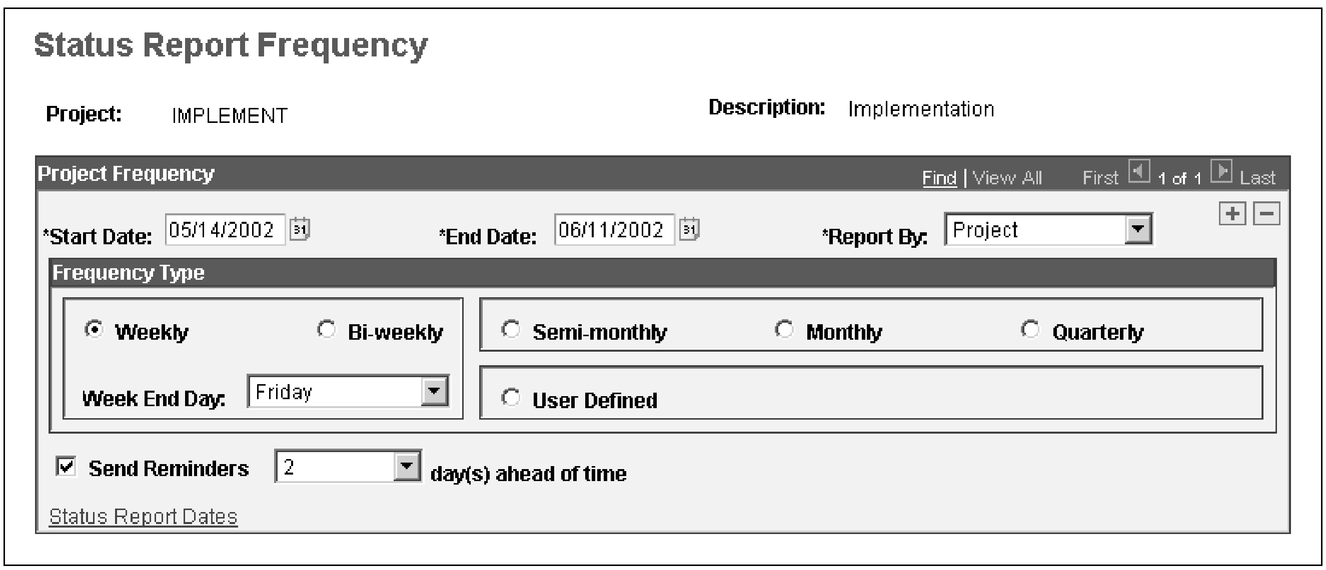
Pages Used to Define Status Reports

Page Name	Object Name	Navigation	Usage
Status Report Frequency	PC_SR_FRQS	Set Up Financials/Supply Chain, Product Related, Program Management, Project Options, Status Report Frequency	Define how often a status report is required.
User Defined Dates	PC_SR_UD_FRQS	Click the User Defined Dates link on the Status Report Frequency page.	Enter status report due dates for frequencies that are not standard and are defined by the user instead.
Status Report Dates	PC_SR_DATES	Click the Status Report Dates link on the Status Report Frequency page.	Review due dates for status reports.

Defining Status Report Frequency

Access the Status Report Frequency page.

Note. A status report frequency must be defined before any status reports can be created for the project.



Status Report Frequency page

Project Frequency

Start Date and **End Date** Enter beginning and ending dates that determine the time period of a status report.

Report By Select *Project* to indicate that status reports are recorded at the project level. Select *Activity* to indicate that status reports are recorded at the activity level.

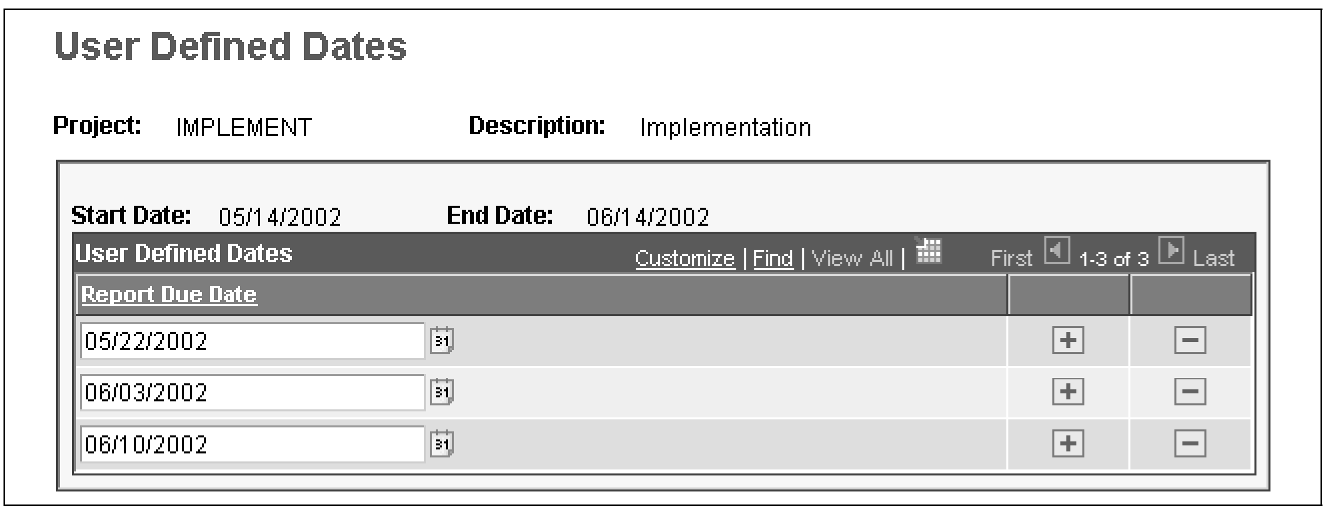
Frequency Type

Set up a frequency type by selecting a time period. If Weekly or Bi-weekly is selected, select a value in the Week End Day field to indicate what day is the final day of the reporting week. Frequency types can also be designated as semi-monthly, monthly, or quarterly.

User Defined	Select this option when the required frequency for status reports is nonstandard. When this frequency type is selected, the User Defined Dates link becomes available.
User Defined Dates	This link is available only if the User Defined frequency type is selected. Click this link to access the User Defined Dates page where you can specify report due dates.
Send Reminders [x] day(s) ahead of time	Select this option to send an email to project team members, reminding them that a status report is due. Choose to send the reminder either *1*, *2*, or *3* days prior to the status report deadline.
Review Status Report Dates	Click this link to access the Status Report Dates page, which calculates start, end, and due dates for status reports.

Specifying User Report Due Dates

Access the User Defined Dates page.

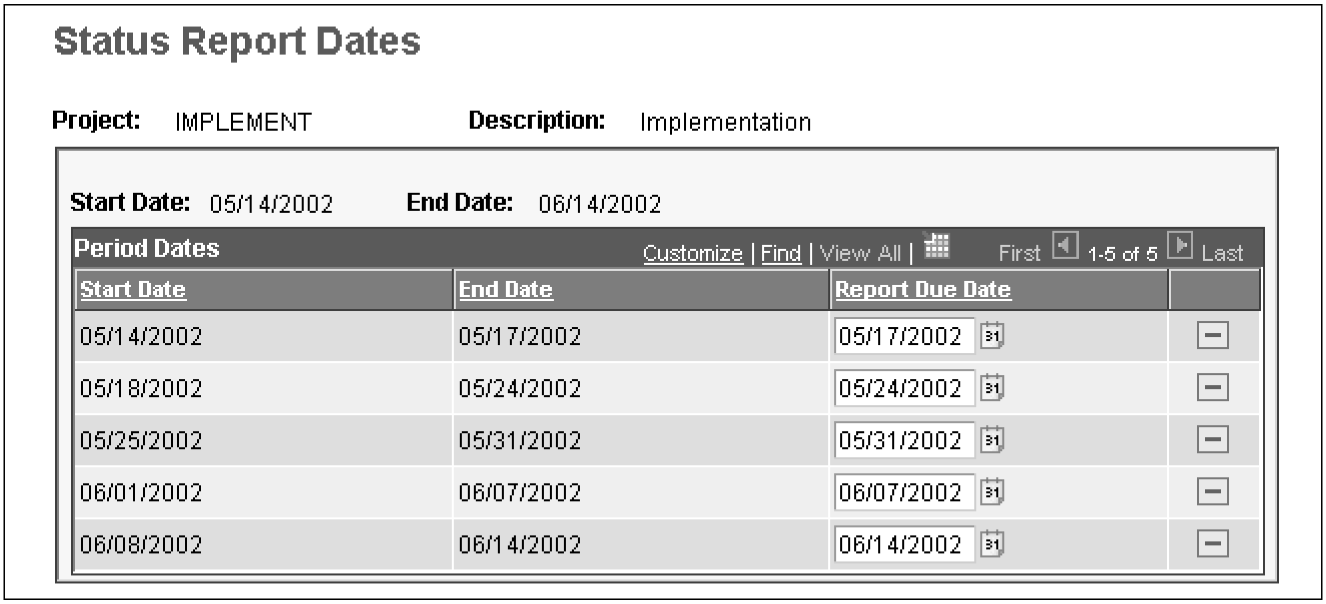


User Defined Dates page

When the User Defined option is selected on the Status Report Frequency page, use this page to specify the report due date. User-defined due dates provide an alternative when standard reporting frequency parameters do not meet the needs of the project. For example, a project might use due dates that occur every 10 days instead of a more standard time period, such as a week.

Determining Status Report Dates

Access the Status Report Dates page.



Status Report Dates

Project: IMPLEMENT Description: Implementation

Start Date: 05/14/2002 End Date: 06/14/2002

Period Dates Customize | Find | View All | First 1-5 of 5 Last

Start Date	End Date	Report Due Date	
05/14/2002	05/17/2002	05/17/2002	
05/18/2002	05/24/2002	05/24/2002	
05/25/2002	05/31/2002	05/31/2002	
06/01/2002	06/07/2002	06/07/2002	
06/08/2002	06/14/2002	06/14/2002	

Status Report Dates page

Based on parameters from the Status Report Frequency page, PeopleSoft Program Management calculates the start, end, and due dates for each status report in the project. For example, the page above displays calculated dates for weekly reports where the week ends on Friday.

When a status report is completed, the Report Due Date field is display-only. If a report is not yet completed, the Report Due Date field can be changed by the project manager.

Entering Status Reports

This section discusses how to:

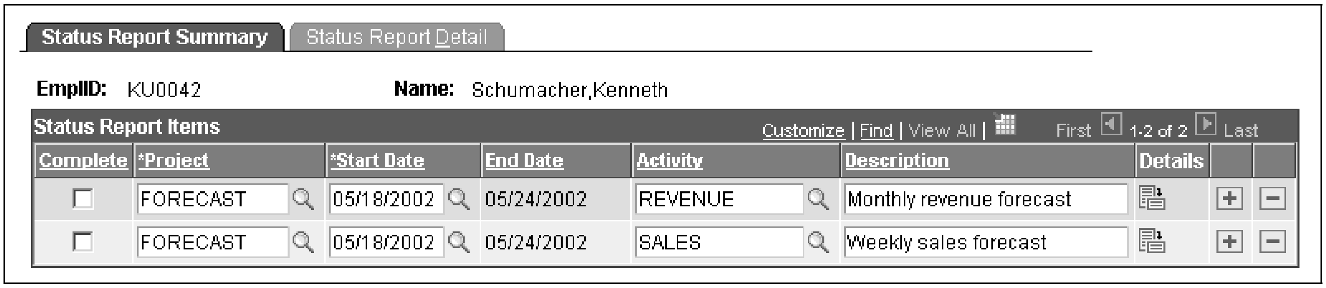
- Create status reports.
- Enter status report details.

Pages Used to Enter Status Reports

Page Name	Object Name	Navigation	Usage
Status Report Summary	PC_SR_SUM	Program Management, Project Management, Add/Update Status Report, Status Report Summary	Project team members enter status reports.
Status Report Detail	PC_SR_DETAIL	Program Management, Project Management, Add/Update Status Report, Status Report Detail	Project team members enter status report details such as comments, and file attachments.

Creating Status Reports

Access the Status Report Summary page.



Status Report Summary page

Complete

Select this check box to notify a project manager that the status report is finished for the reporting period. Only reports with a status of *Complete* are available for the project manager's review process.

Start Date and **End Date**

Select a value in the Start Date column, which automatically populates the End Date column based on the date ranges that are defined on the Status Report Frequency page.

Activity

This column is available for entering data only when status reports are required at the *Activity* level on the Status Report Frequency page.

Details

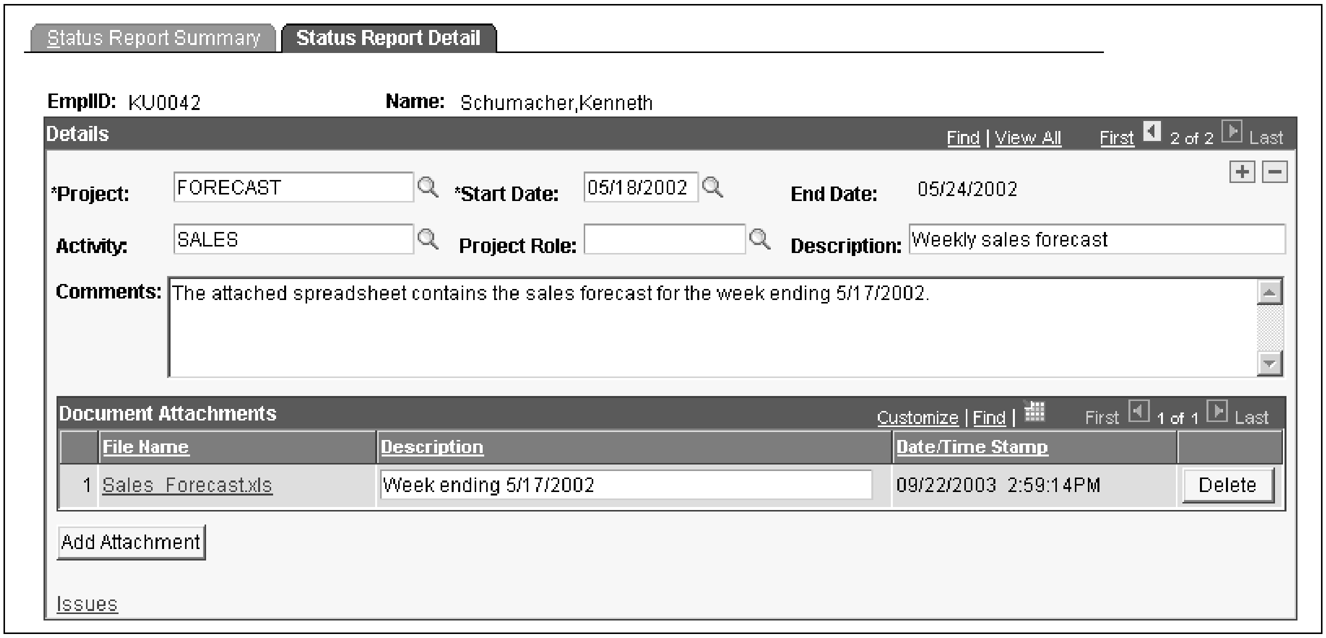
Click the Details button to access the Status Report Detail page, where more information for the reporting period can be added to the status report.

See Also

Chapter 8, "Maintaining Project Status," Defining Status Report Frequency, page 100

Entering Status Report Details

Access the Status Report Detail page.



Status Report Detail page

Start Date and **End Date**

Selecting a value in the Start Date column automatically populates the End Date column based on the date ranges that are defined on the Status Report Frequency page. If a date range is selected on the Status Report Summary page, that date range appears by default on the Status Report Detail page when users click the Details button on the summary page.

Activity

This field is available for entering data only when status reports are required at the *Activity* level on the Status Report Frequency page.

Add Attachment

Click the Add Attachment button to append a file pertaining to the status report. When the file is uploaded, the file name appears in the File Name column and the Date/Time Stamp column is automatically updated.

Issues

Click this link to access the Issue Management component and view or update issues that are related to the status report.

Reviewing Status Reports

This section discusses how to:

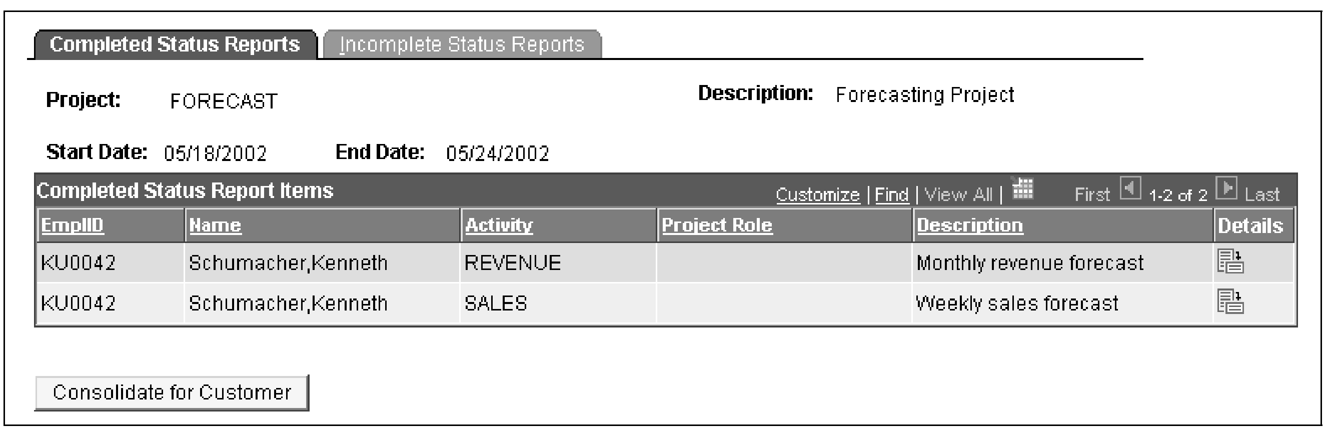
- Review completed status reports.
- Review completed status report details.
- Consolidate status reports for customers.
- Review lists of incomplete status reports.
- Send status report reminders.
- Send automatic reminders.

Pages Used to Review Status Reports

Page Name	Object Name	Navigation	Usage
Completed Status Reports	PC_SR_VIEW	Program Management, Project Management, Review Status Reports, Completed Status Reports	View a list of completed status reports by employee.
Status Report Details - Review	PC_SR_VIEW_DTL	Click the Details button on the Completed Status Reports page.	View the details of completed status reports.
Consolidate for Customer	PROJ_CONS_FOR_CUST	Click the Consolidate for Customer button on the Completed Status Reports page.	Review and edit the text version of all employee status reports. Email a consolidated report to customers.
Incomplete Status Reports	PC_SR_INCOMPLETE	Program Management, Project Management, Review Status Reports, Incomplete Status Reports	View a list of employees who have not completed their status reports.
Status Report Reminder	PC_SR_NOTIFY	Click the Send Reminder button on the Incomplete Status Reports page.	Send email reminders to project team members who have not completed their status reports.
Status Report Reminder run control	PC_SR_REMINDER	Set Up Financials/Supply Chain, Product Related, Program Management, Project Options, Status Report Reminder	Specify run control parameters to run the PC_SR_REMIND Application Engine process, which sends emails to project team members reminding them about their status report due dates.

Reviewing Completed Status Reports

Access the Completed Status Reports page.



Completed Status Reports page

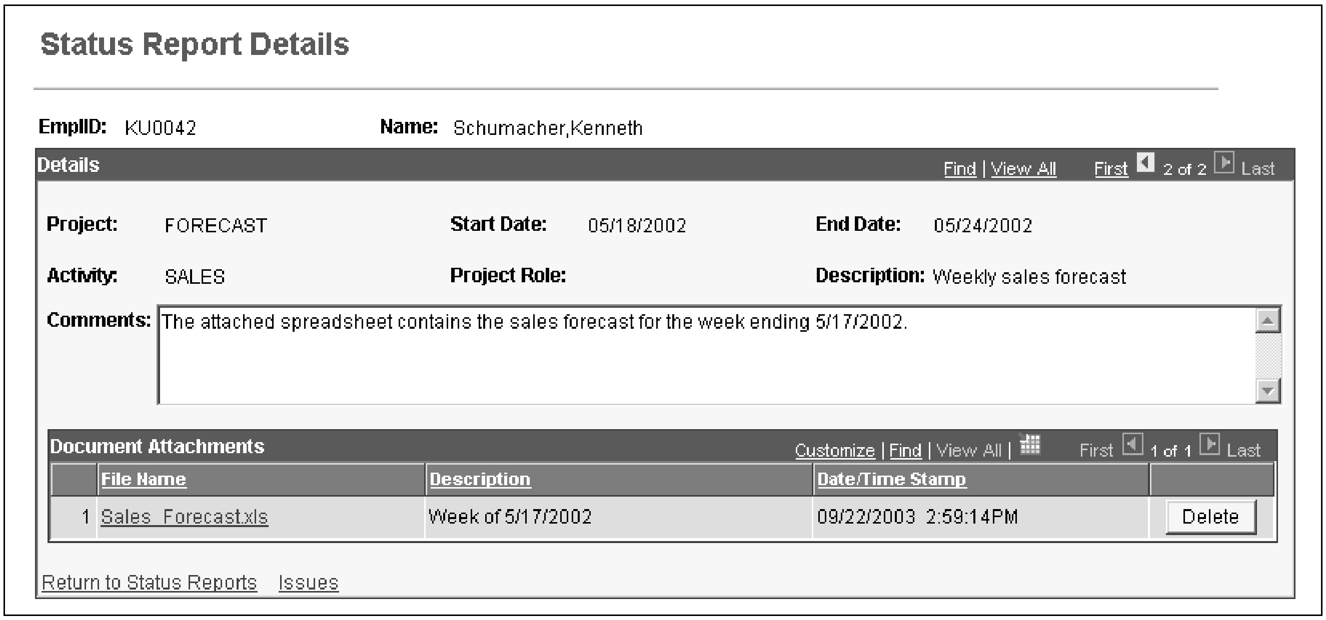
This page displays a list of status reports that have the Complete option selected on the Status Report Summary page.

Details Click the Details button to access the Status Report Details page and view additional information pertaining to the status report.

Consolidate for Customer Click this button to access the Consolidate for Customer page, where project managers can pull together all completed status reports.

Reviewing Completed Status Report Details

Access the Status Report Details - Review page.



Status Report Details - Review page

Project managers can view and delete file attachments, but all other data is display only.

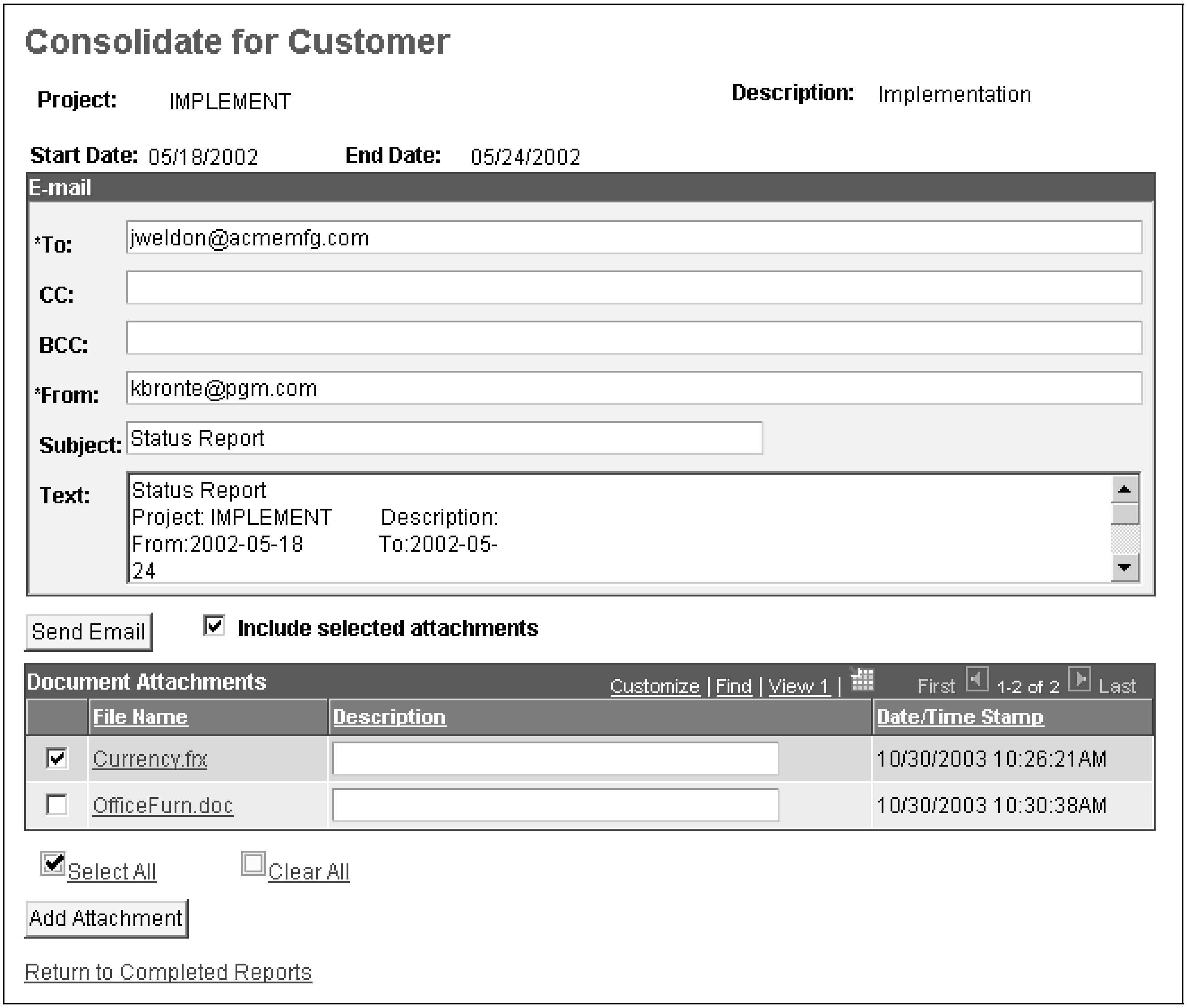
Document Attachments

File Name This column displays a list of file attachments pertaining to the status report. To open the attachment, click the file's name, which is a link to the document.

Issues Click the link to access the Issue Management component and view or update issues that are related to the status report.

Consolidating Status Reports for Customers

Access the Consolidate for Customer page.



Consolidate for Customer page

Enter the email address(es) for the customers to whom this status report will be sent.

Subject
This field is automatically populated with the text *Status Report* and can be edited.

Text
This field contains details from all completed team member status reports. Project managers can edit the text before sending a consolidated report to customers, but the edits do not modify the original employee status reports.

Send Email
Click the Send Email button to send the status report.

Include selected attachments
Selecting this option means that attachments from all completed status reports are automatically included in the consolidated report. Before emailing the report, project managers can select which attachments are sent to customers as part of the final report.

Select All and **Clear All** — Selects or clears all file attachments to be included or excluded from the consolidated report.

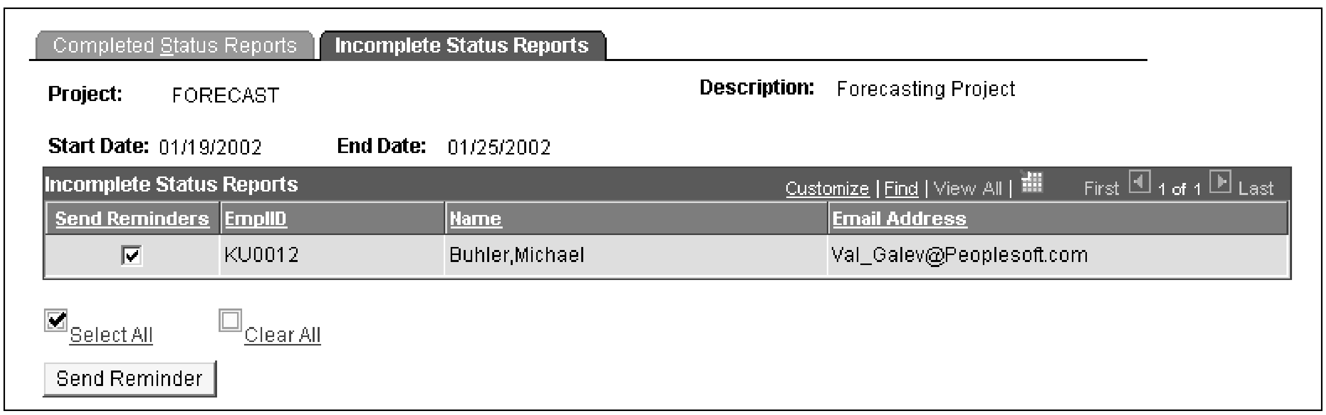
Add Attachment — Click to append a file pertaining to the consolidated status report. When the file is uploaded, the file name appears in the File Name column and the Date/Time Stamp column is automatically updated.

Note. Attachments are sent using the file attachment option method specified by using the Project Costing page (INSTALLATION_PC) of the Installation Options component (INSTALLATION). To ensure attachments are sent, you should verify that this option is set up correctly.

See *PeopleSoft 8.8 Application Fundamentals for Financial Management Solutions, Enterprise Service Automation, and Supply Chain Management PeopleBook*, “Setting Installation Options for PeopleSoft Applications,” Setting PeopleSoft Project Costing Installation Options.

Reviewing Lists of Incomplete Status Reports

Access the Incomplete Status Reports page.

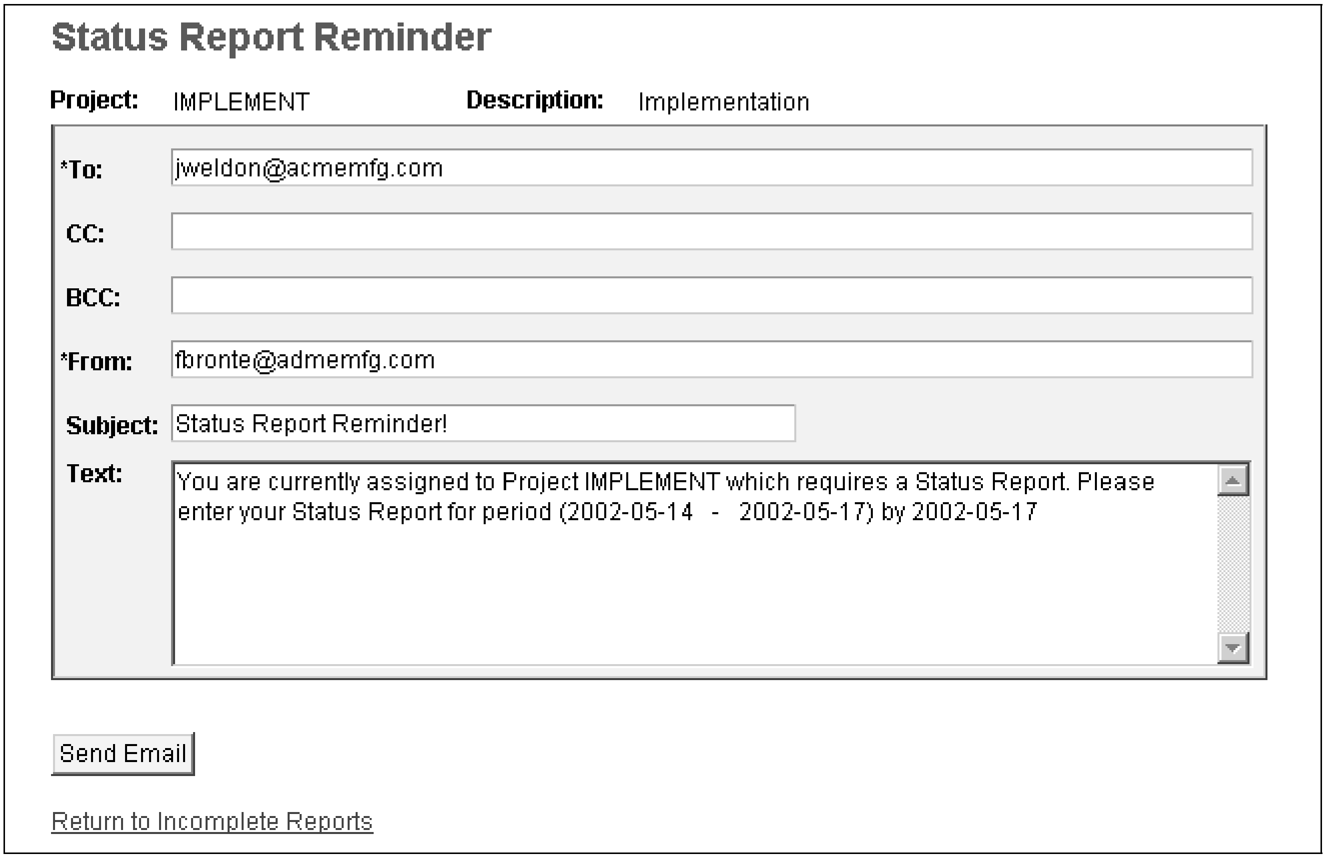


Incomplete Status Reports page

Project managers can review a list of team members who have not completed status reports and select their names to email them reminders. Click the Send Reminder button to set up the email on the Status Report Reminder page.

Sending Status Report Reminders

Access the Status Report Reminder page.



Status Report Reminder page

This page is used for project managers to set up and email a message to project team members reminding them of their status report due date.

Subject	This field is automatically populated with the text *Status Report Reminder!* and can be edited.
Text	This field is automatically populated with information from the status report for which the employee is being reminded. Project managers can edit the text before sending the email.
Send Email	Click this button to send the email to the specified employee(s).

Sending Automatic Reminders

Access the Status Report Reminder run control page.

The Status Report Reminder process (PC_SR_REMINDER) sends emails to project team members reminding them that their status reports are due. This process is automatically initiated when the Send Reminders option is selected on the Status Report Frequency Setup page, and the number of days before the due date indicates when to send the reminders.

See Also

Chapter 8, "Maintaining Project Status," Defining Status Report Frequency, page 100

CHAPTER 9

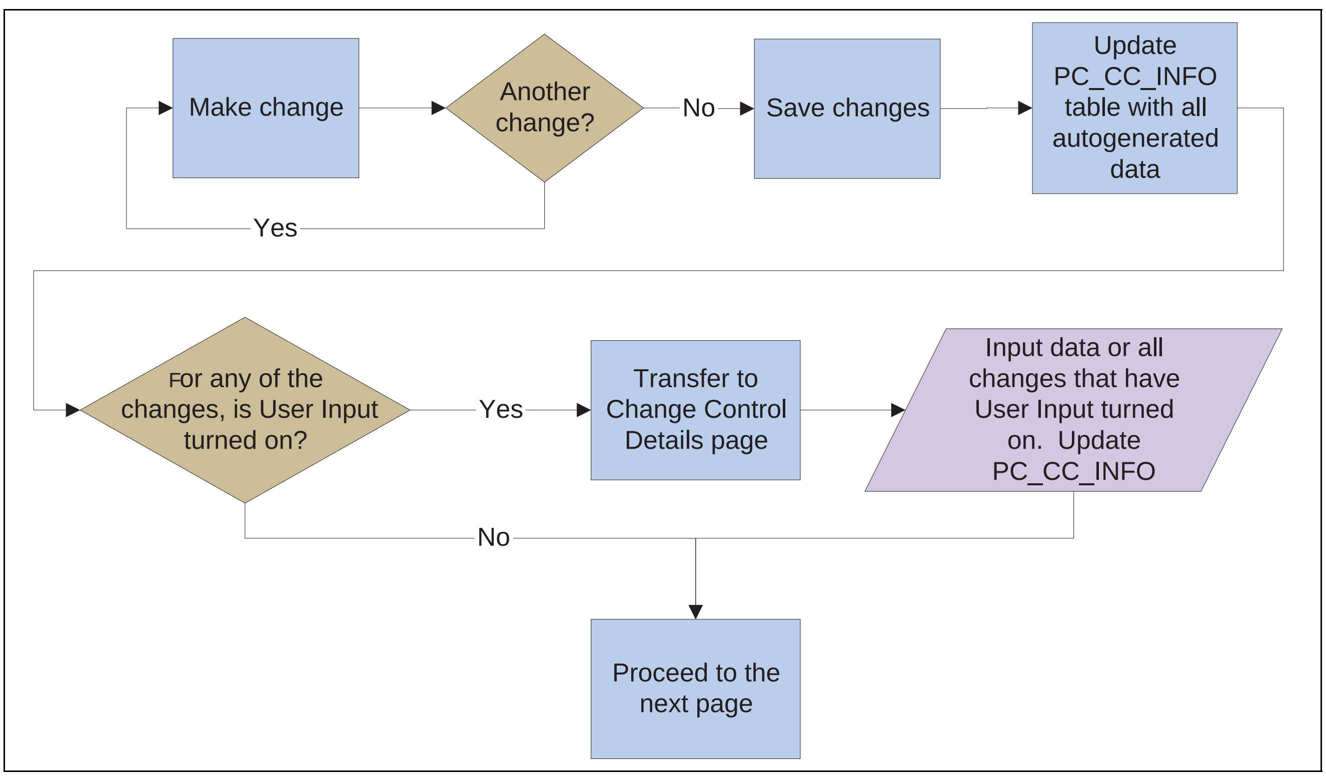
Tracking Project Changes

This chapter provides an overview of change control management and discusses how to implement change control management.

Understanding Change Control Management

In PeopleSoft Program Management, change control encompasses the ability to monitor changes to project scope and related attributes such as project and activity dates, milestones, and adding and removing resources. The feature also provides the ability to notify concerned parties when the changes occur. When changes are made to a specified attribute, a record of the change is stored on the PC_CC_INFO table. If specified, the user who initiates the change is required to enter the reason for making a change. After changes have taken place, a summarized list of changes and the details of each change can be viewed.

This diagram illustrates the change control process:



Change control flow diagram

A change control template stores attributes that are to be monitored. Attributes are fully configurable, and users can select which changes to track, whether or not they require a reason for the change, and whether notifications should be sent. A default template is assigned at the business unit level, but it can be overridden at the project or activity level.

These steps describe how to implement the change control management functionality:

1. Use the Change Control Template page to create a change control template that defines the attributes to be monitored and whether changes will require that the user who initiates the change must provide a reason for it.

   Once created, the template can be specified as the default change control template for a projects business unit on the Program Management Options page.

2. Enable change control and select a template at the project level by using the Program Management Defaults page.

   If the selected change control template specifies change control at the activity level, it can be disabled for an individual activity on the activity Definition page. Change control attributes can be tracked for all of the project's activities or only for a select few.

3. Make changes to the project as necessary.

   If changes are made to any of the defined change control attributes, they are recorded in the PC_CC_INFO table. The changes can be viewed on the Change Control Monitor page and Change Control Details page.

Implementing Change Control Management

To implement change control management, use the Change Control Management (PC_CHC) component.

This section discusses how to:

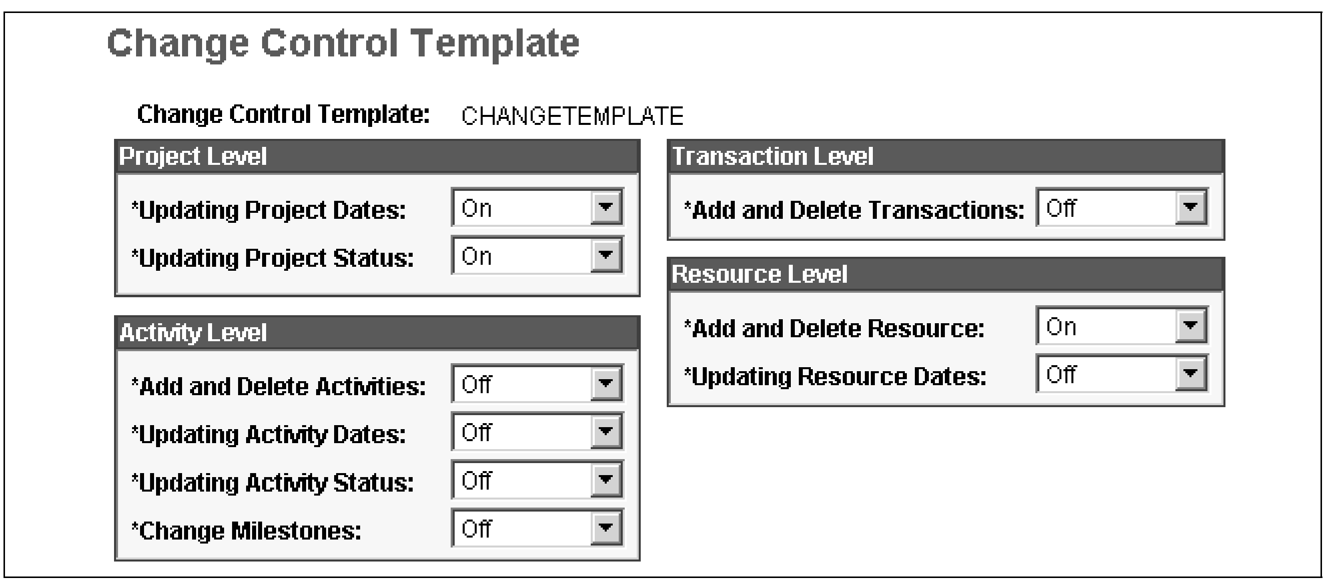
- Create a change control template.
- Enter user input for changes.
- View changes to a project.
- View change details.
- Analyze change control.

Pages Used to Implement Change Control Management

Page Name	Object Name	Navigation	Usage
Change Control Template	PC_CHC_CFG	Setup Financials/Supply Chain, Product Related, Program Management, General Options, Change Control Template	Create or modify a change control template.
Change Control User Input	PC_CHC_INPUT	This page appears only after changes are made and saved to a change control attribute that is specified on the change control template as *User Input.*	Enter required reason for change.
Change Control Monitor	PC_CHC_MONITOR	Program Management, Project Management, Change Control Monitor, Monitor	View a list of changes that took place for projects and activities for which change control is enabled.
Change Control Details	PC_CHC_INFO	Program Management, Project Management, Change Control Monitor, Details	View details of a change, including comments entered on the Change Control User Input page. Additional comments regarding the change can also be added.
Change Control Analysis	PC_EA_CHG_CONTROL	Program Management, Interactive Reports, Change Control	Use search criteria to display list of changes in the scoping of a project.

Creating a Change Control Template

Access the Change Control Template page.



Change Control Template page

Use this page to specify which change control attributes are to be monitored and to what extent. Options for the fields on this page are:

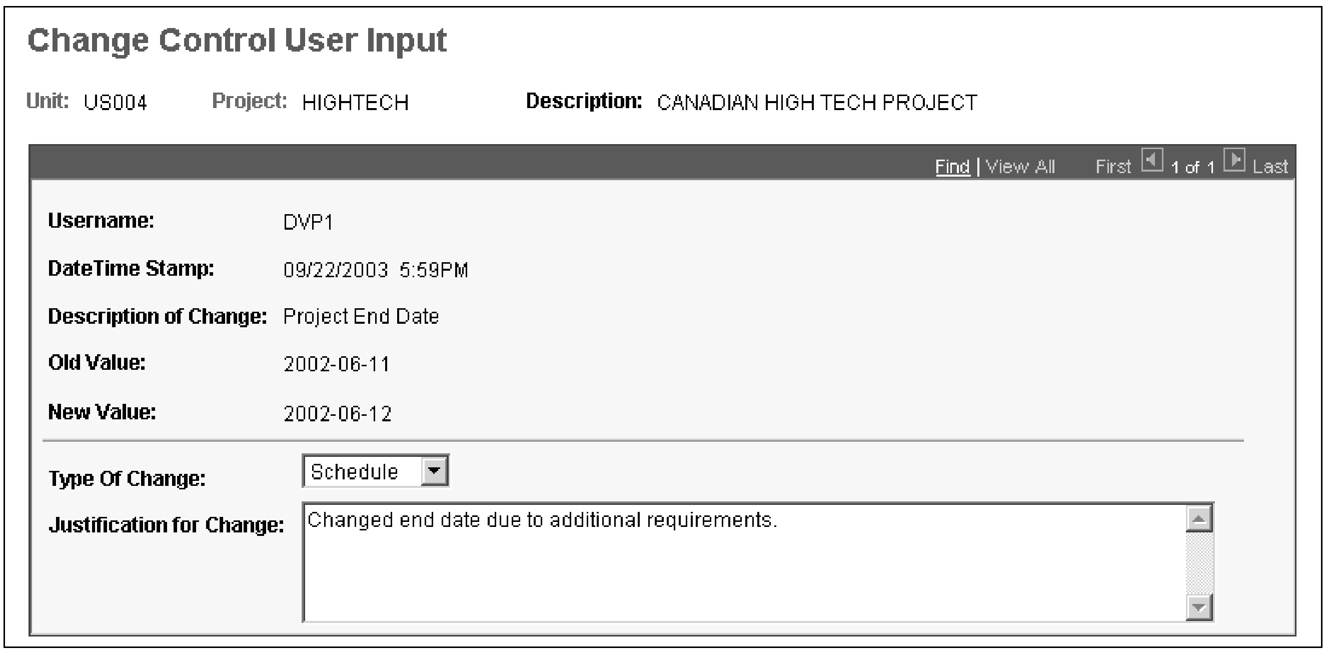
On Change control is enabled for this attribute and change information—user name, change made, and date—is automatically generated.

User Input This option has the same effect as the *On* option, but users must enter a reason for the change. When *User Input* is selected, the Change Control User Input page is automatically displayed after the change is saved. This option is not available for project transactions.

Off Change control is not enabled for this attribute. This is the default setting.

Entering User Input for Changes

The Change Control User Input page will appear whenever changes were made to an attribute that requires user input. User input is an option that is available for most attributes on the Change Control Template page.



Change Control User Input page

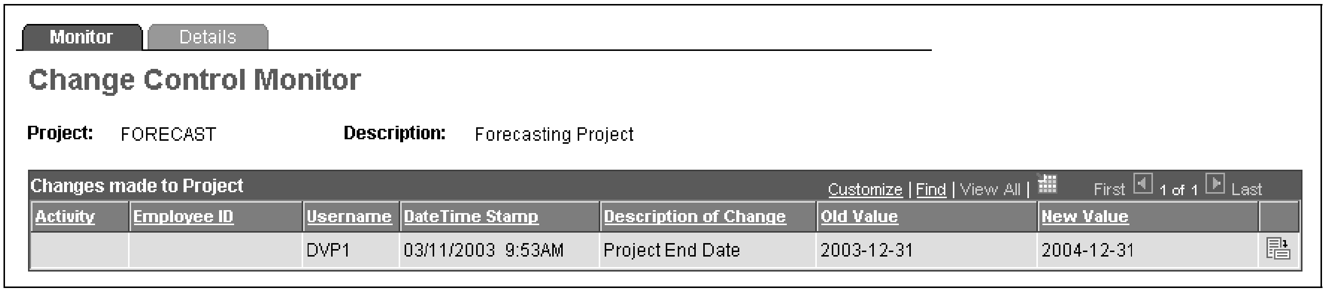
Type of Change This field defaults to the value corresponding to the change that was initiated. Users can overwrite the value in this field.

Justification for Change Enter the reason for the change. This is a required field.

If multiple changes requiring user input are made on the same page, the Change Control User Input page is displayed with a scroll area to accommodate entering data for each change.

Viewing Changes to a Project

Access the Change Control Monitor page.



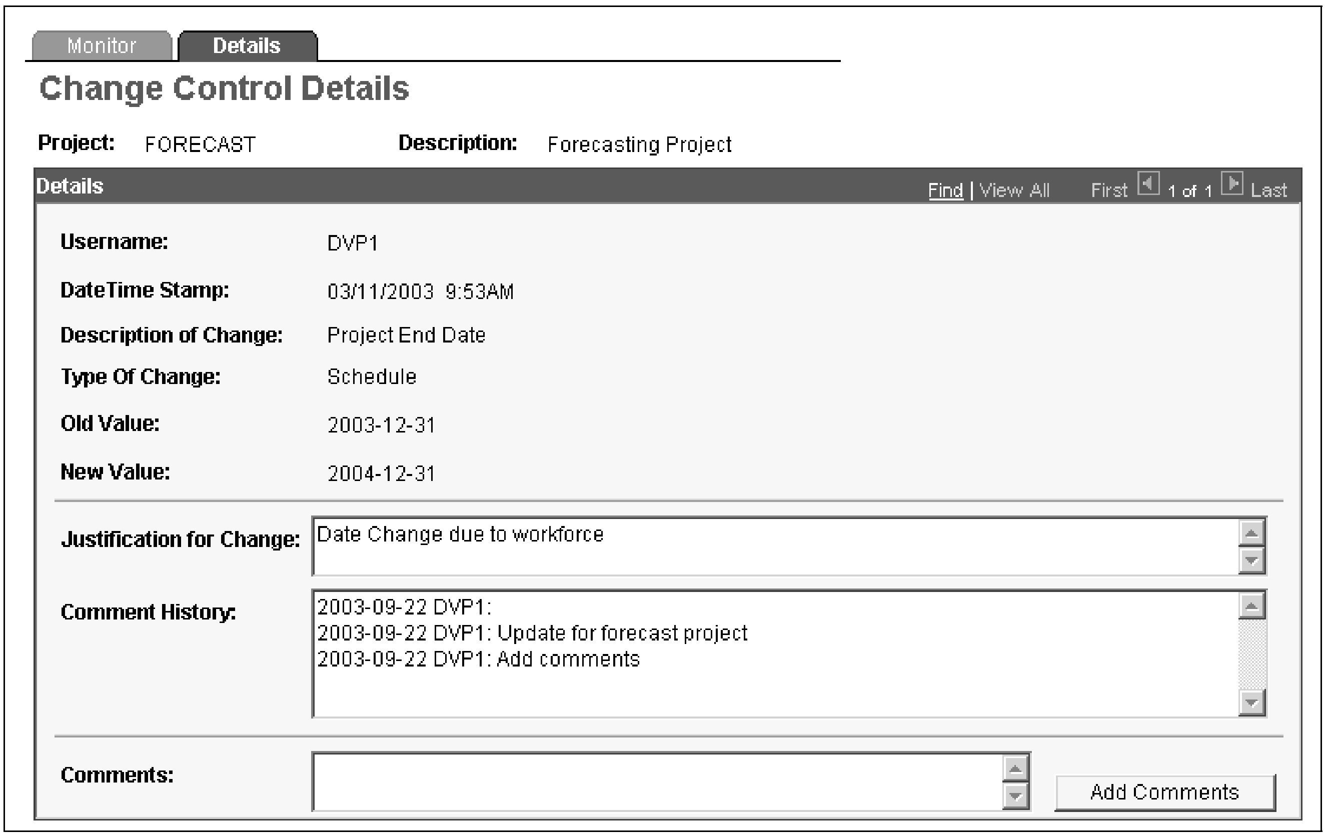
Change Control Monitor page

This page lists a summary of changes to the specified change control attributes for a project.

Click the corresponding Details button to view the details of that change.

Viewing Change Details

Access the Change Control Details page.

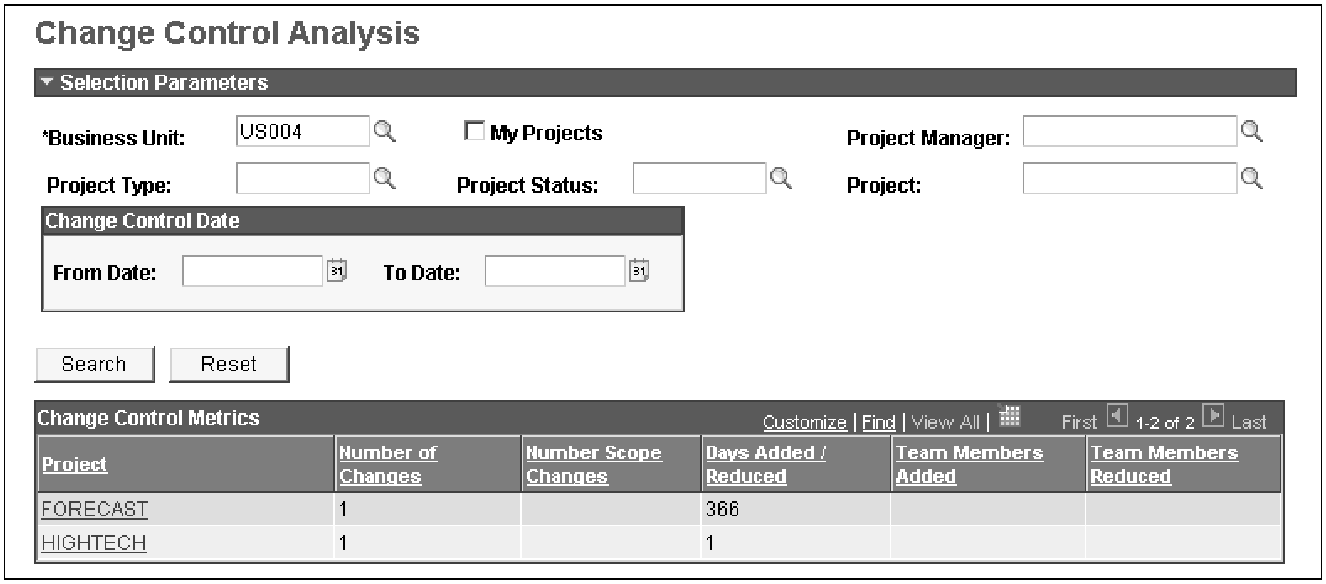


Change Control Details page

This page displays the details of a change and includes user input if it was required. The Justification for Change and Comment History fields cannot be edited, but users can enter additional information in the Comments field. Clicking the Add Comments button moves text from the Comments field to the Comment History field, where the text is displayed with the date of input and the user ID who entered the comment.

Analyzing Change Control

Access the Change Control Analysis page.



Change Control Analysis page

Enter the necessary search criteria to filter the projects that have change control enabled. Click the Search button to retrieve and display a list of projects that meet the specified parameters. Click the Reset button to reinstate the default search settings.

Change Control Metrics

Project — Click a project name link to access the project's Change Control Monitor page.

Number of Changes — This field displays the total number of changes recorded for the project.

Number Scope Changes — This field displays the number of change control rows for the project where the type of change is *Scope.*

Days Added/Reduced — This field displays the total number of days by which the project is increased or decreased based on change control rows for project date changes.

Team Members Added — This field displays the number of team members who are added to the project.

Team Members Reduced — This field displays the number of team members removed from the project.

CHAPTER 10

Tracking Deliverables

It is important to be able to determine the progress of a project and to assess progress at different levels of the project cycle. In addition to the tools that track programs and projects, PeopleSoft Program Management delivers the ability to monitor the status of deliverables at the activity level.

This chapter discusses how to monitor activity deliverables.

Monitoring Deliverables

This section discusses how to:

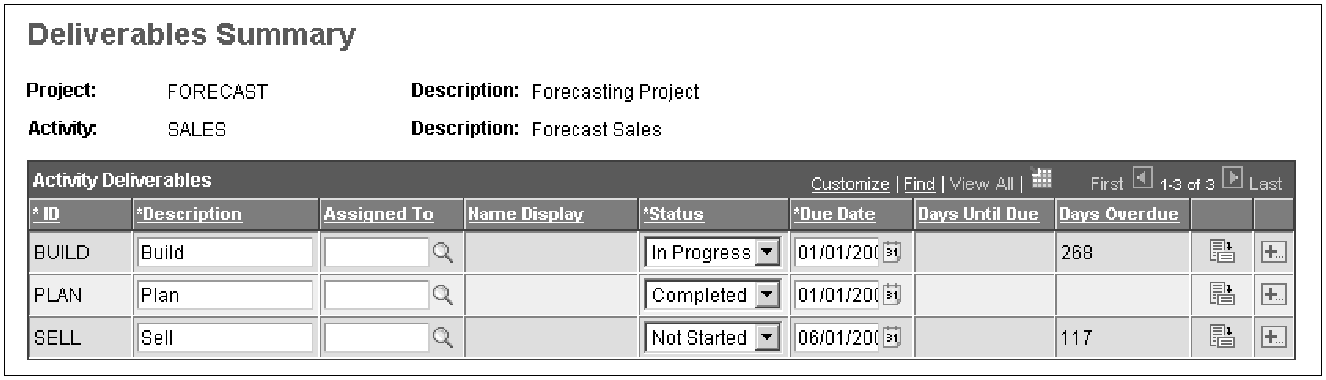
- View an activity's deliverables.
- View deliverable details.

Pages Used to Monitor Deliverables

Page Name	Object Name	Navigation	Usage
Deliverables Summary	PROJ_ACT_DELV_01	Program Management, Project Management, Review Deliverables	View and edit a list of deliverables that are associated with a particular activity.
Deliverable Detail	PROJ_ACT_DELV_02	• Program Management, Project Management, View/Update Deliverables • Click the Deliverable Detail button on the Deliverables Summary page.	View and edit the various elements of a deliverable.

Viewing an Activity's Deliverables

Access the Deliverables Summary page.



Deliverables Summary

Project: FORECAST **Description:** Forecasting Project

Activity: SALES **Description:** Forecast Sales

Activity Deliverables — Customize | Find | View All | First 1-3 of 3 Last

* ID	*Description	Assigned To	Name Display	*Status	*Due Date	Days Until Due	Days Overdue		
BUILD	Build			In Progress	01/01/20(		268		
PLAN	Plan			Completed	01/01/20(				
SELL	Sell			Not Started	06/01/20(		117		

Deliverables Summary page

ID — Enter or review the unique identifier for the deliverable.

Description — Enter a short description of the deliverable.

Assigned To and **Name Display** — Select the employee ID of the person who is assigned to complete the deliverable. When the employee ID is selected, the employee's name is displayed in the Name Display column.

Status — Select from the following: *Completed*, *In Progress*, or *Not Started*.

Due Date — Enter the date on which the deliverable is expected to be completed.

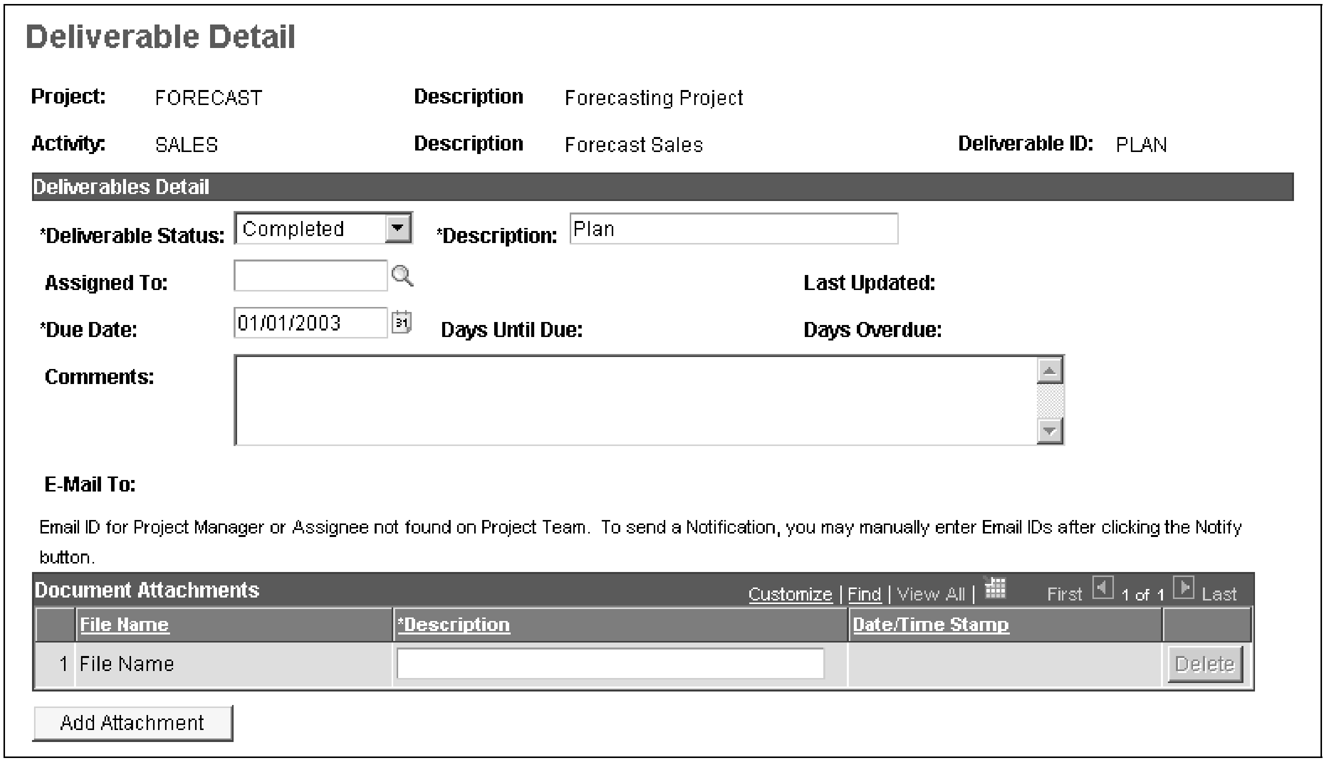
Days Until Due — The system calculates the number of days remaining between the current date and the due date.

Days Overdue — The system calculates the number of days that the current date is beyond the due date.

 — Click to access the Deliverable Detail page where you can view and edit the elements of the deliverable.

Viewing Deliverable Details

Access the Deliverable Detail page.



Deliverable Detail page

Deliverables Detail

Comments Enter any characters to explain or clarify the deliverable.

Document Attachments

Use this section to attach documents that are relevant to the deliverable. A description must be entered before the page can be saved.

CHAPTER 11

Analyzing Project Data

This chapter provides discusses how to:

- View earned value.
- View estimate to complete variance.

See Also

Chapter 6, “Scheduling and Managing Resources,” Analyzing Resource Lists, page 84

Chapter 9, “Tracking Project Changes,” Analyzing Change Control, page 115

PeopleSoft Services Forecasting 8.8 PeopleBook, “Analyzing Resource Utilization”

PeopleSoft Project Costing 8.8 PeopleBook, “Reviewing and Adjusting Project Costs”

PeopleSoft Project Costing 8.8 PeopleBook, “Analyzing Projects,” Performing Flexible Analysis

Viewing Earned Value

This section provides an overview of earned value and discusses how to view earned value.

Understanding Earned Value

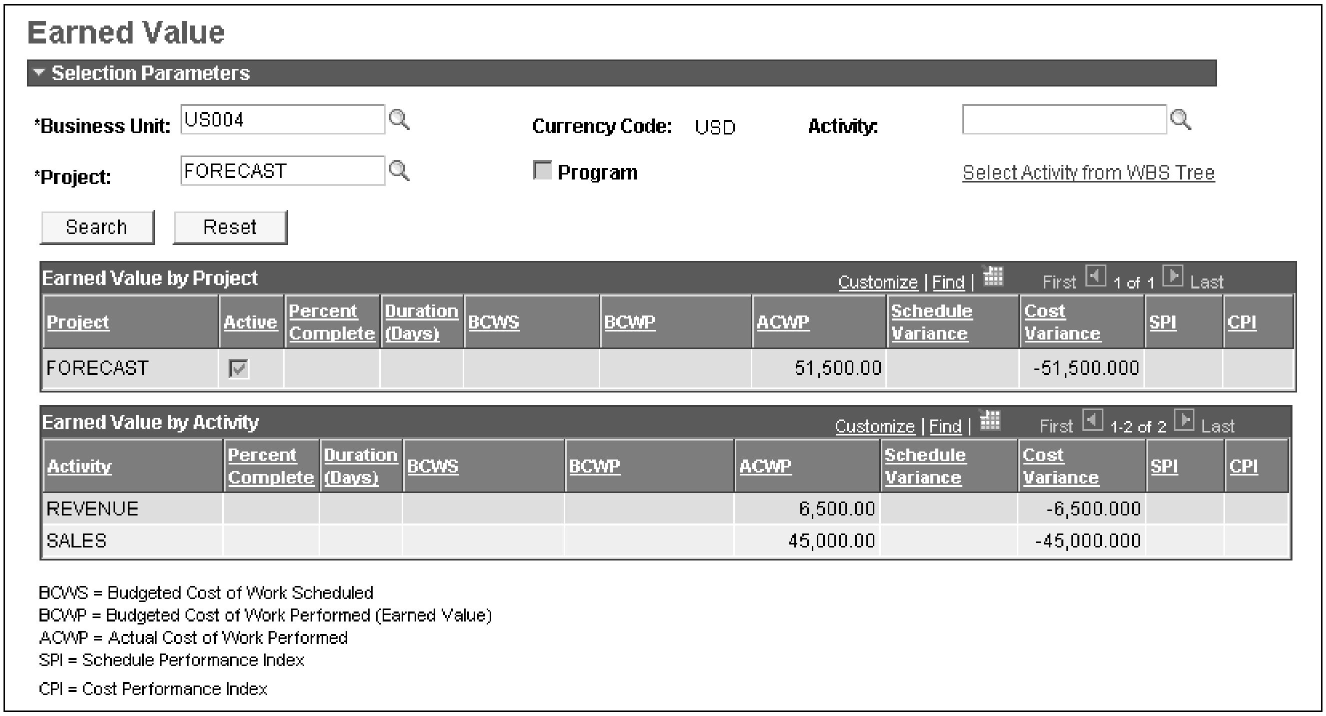
Earned value is a way to monitor an activity’s budget by comparing the amount of work performed against the amount budgeted for that quantity of work. Therefore, if half of the work required by an activity is completed, only half of the activity’s budget should have been used.

Page Used to View Earned Value

Page Name	Object Name	Navigation	Usage
Earned Value	PC_EA_EARNED_VALUE	Program Management, Interactive Reports, Earned Value	View earned value and other data related to time factors, budget, and actual cost of a project and its activities.

Viewing Earned Value

Access the Earned Value page.



Earned Value page

Enter the necessary search criteria to filter the projects or activities that require earned value analysis. Click the Search button to retrieve and display a list of projects and activities that meet the specified parameters. Click the Reset button to reinstate the default search settings.

If a detail project is entered in the Project field, the page displays earned value data for the entire project and for each activity within the project.

If a program is entered in the Project field, the page displays earned value data for all projects under the specified program. The Max Level field limits the selection of child projects to the first, second, or third level under the program as defined on the enterprise program tree.

Percent Complete — The percent complete value is calculated based on the method selected on the Project Costing Options page (projects business unit level) or the Project Costing Definition page (project level).

Duration (Days) — Number of days allotted for the completion of the project or activity.

BCWS (Budgeted Cost of Work Scheduled) — Budget amount allocated for the time period starting from the beginning of the project or activity to the current date.

BCWP (Budgeted Cost of the Work Performed) — Budgeted cost based on the percentage of the project or activity completed and the corresponding duration date. For example, if the project is 50 percent complete, this field summarizes and displays all BUD rows in the PC_SUMMARY_TBL that have an accounting date equal to or less than the halfway date of the project's duration. This is also known as the "earned value."

ACWP (Actual Cost of Work Performed) — Actual cost of the project or activity as of the current date.

Schedule Variance	Cost difference between the baseline plan and the current progress of the activity at the current date. Calculated as: *Budgeted Cost of Work Performed − Budgeted Cost of Work Scheduled*
Cost Variance	Difference between how much it should have cost to achieve the current level of completion for the activity, and how much it has actually cost to a achieve the level of completion as of the current date. Calculated as: *Budgeted Cost of Work Performed − Actual Cost of Work Performed.*
SPI (Schedule Performance Index)	Ratio of work performed to work scheduled. Calculated as: *Budgeted Cost of Work Performed ÷ Budgeted Cost of Work Scheduled* .
CPI (Cost Performance Index)	Ratio of budgeted cost of work performed to actual cost. Calculated as: *Budgeted Cost of Work Performed ÷ Actual Cost of Work Performed.*

Viewing Estimate to Complete Variance

This section discusses how to:

- View estimate to complete variance.
- View estimate to complete variance charts.

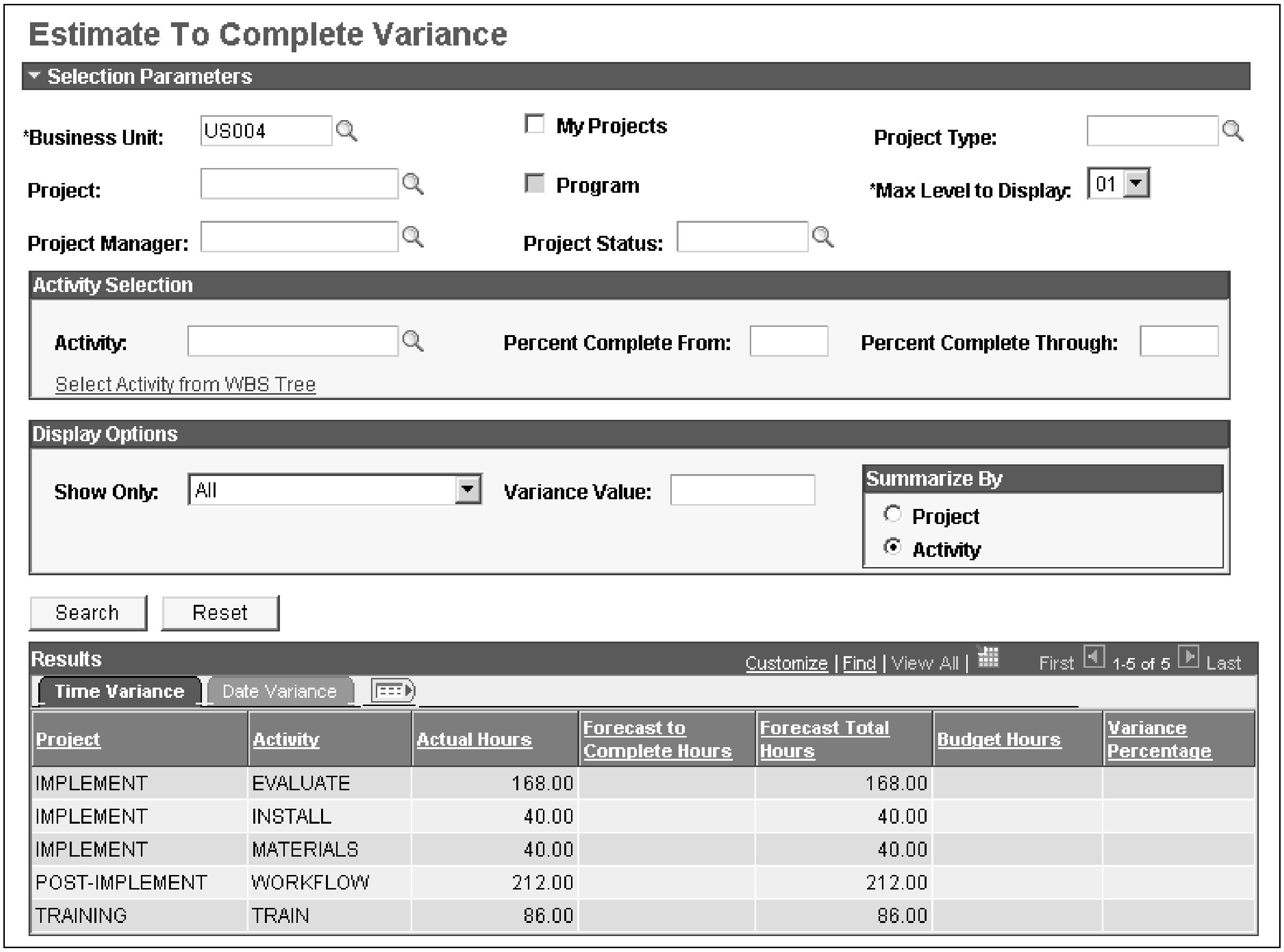
Pages Used to View Estimate to Complete Variance

Page Name	Object Name	Navigation	Usage
Projects Business Unit Definition	BUS_UNIT_TBL_PC	Set Up Financials/Supply Chain, Business Unit Related, Project Costing, Project Costing Definition	To use this analytic function, select a value for the Hours Unit of Measure field. This value is used to convert the quantity of the selected unit of measure to hours.
Estimate to Complete Variance	PC_EA_ETC_ANL1	Program Management, Interactive Reports, Estimate to Complete	Provides project search criteria to display a list of project transactions with time and date variance data.
Estimate to Complete Variance - Graphical View	PC_EA_ETC_ANL2	Click the Graphical View link on the Estimate to Complete Variance page.	Uses search criteria from Estimate to Complete Variance page to display graphical view of project time and date variance data.

Viewing Estimate to Complete Variance

Access the Estimate to Complete Variance page.

Note. This page will only report projects for which the forecasting level is set to *Project /Activity* on the Program Management Defaults page.



Estimate to Complete Variance page

Enter the necessary search criteria to filter the projects that require estimate to complete variance analysis. Click the Search button to retrieve and display a list of projects that meet the specified parameters. Click the Reset button to reinstate the default search settings.

The page displays time and date variance data for each project in the filtered list.

Click the Graphical View link to create a chart view of the variance data. This link is only available if the selected Summarize By option is *Project.*

Activity Selection

Activity, Percent Complete From, and **Percent Complete Through**	To provide further search criteria, select an activity ID for which the completion percentage ranges from the value in the Percent Complete From field through the value in the Percent Complete Through field.
Select Activity from WBS Tree	Click this link to access the WBS (Work Breakdown Structure) tree, from which an activity can be selected.

Display Options

These options customize how variance data is displayed.

Show Only — Select a value other than the default *All* to limit the displayed variances by using a comparison Variance Value. Options are:

- *All*.
- *Variance Days Over*.
- *Variance Days Under*.
- *Variance Hours Percent Over*.
- *Variance Hours Percent Under*.

Variance Value — Specify the variance value to be used for comparison purposes.

Summarize By — Select whether variance data is displayed by *Project* or by *Activity*.

Time Variance and Date Variance

Activity — This column is displayed only if *Activity* is selected in the Summarize By section.

Actual Hours — Number of hours recorded for the project or activity.

Forecast to Complete Hours — Number of forecasted hours to complete the project or activity from the forecasting tables FC_TIME_HDR and FC_TIME_DTL.

Forecast Total Hours — Sum of Actual Hours and Forecast to Complete Hours.

Budget Hours — Total number of hours budgeted for the project or activity.

Variance Percentage — $(\textit{Forecast Total Hours} - \textit{Budget Hours}) \div \textit{Budget Hours} \times 100$

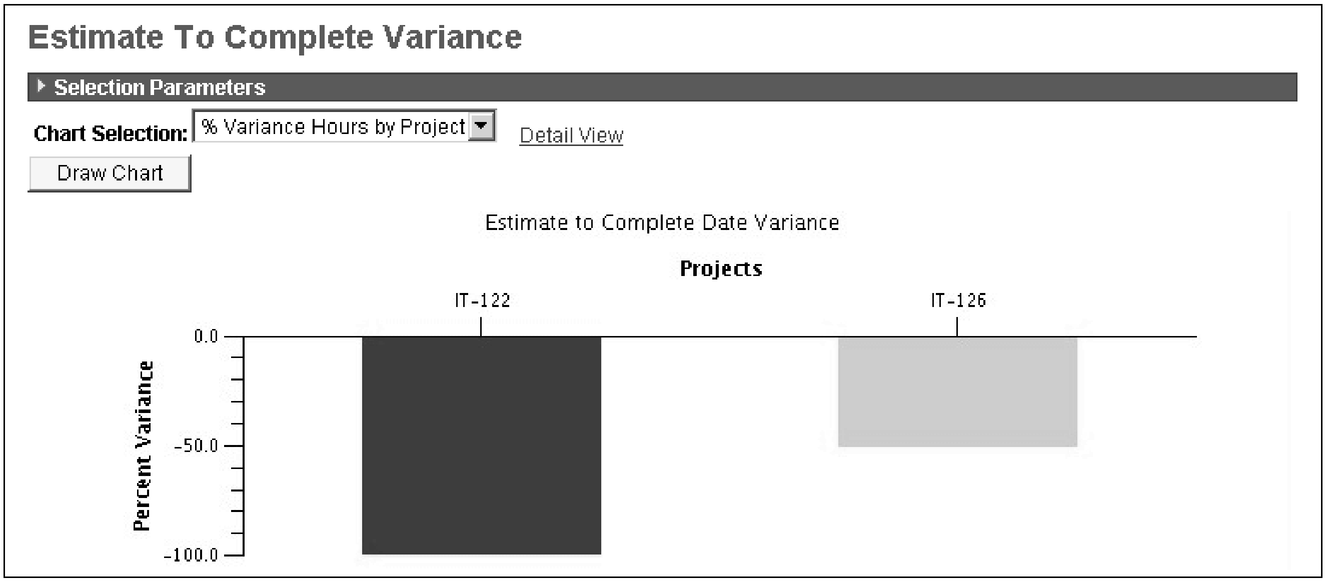
End Date — If the list is summarized by activity, this is the activity's end date. If the list is summarized by project, this is the project's end date.

Estimate to Complete Date — Completion date estimate from the forecasting table FC_TIME_DTL.

Variance (Days) — Difference between the end date and estimate to complete date in days. Negative values indicate completion ahead of schedule and positive values indicate number of days behind schedule.

Viewing Estimate to Complete Variance Charts

Access the Estimate to Complete Variance - Graphical View page.



Estimate To Complete Variance - Graphical View page

Chart Selection

Select one of the following chart options and click the Draw Chart button to display the chart.

% Variance Hours by Project: Displays bar chart of budget versus forecast hours percent variance.

Project Status Breakdown: Displays pie chart of projects classified by status.

Project Type Breakdown: Displays pie chart of projects classified by type.

Variance Days by Project: Displays bar chart of estimate to complete date variance.

Detail View

Click this link to access the Estimate To Complete Variance page, which displays the list of projects and corresponding variance data that are being charted.

CHAPTER 12

Integrating with Other Applications

This chapter discusses:

- Integration with PeopleSoft Project Portfolio Management.
- Integration with PeopleSoft Project Costing.
- Integration with PeopleSoft Resource Management.
- Third-party integration.

Integration with PeopleSoft Project Portfolio Management

This section provides an overview of integration with PeopleSoft Project Portfolio Management and describes how to:

- Set up Peoplesoft Integration Broker.
- Activate relevant application messages.

Note. If you are not implementing PeopleSoft Project Portfolio Management, you do not need to read this section.

Understanding Integration with PeopleSoft Project Portfolio Management

PeopleSoft Project Portfolio Management resides in the PeopleSoft Enterprise Performance Measurement (EPM) database and is not required for implementing PeopleSoft Program Management. However, if PeopleSoft Project Portfolio Management is installed, project requests must originate from the EPM database. The system uses application messaging to receive project request information from the EPM database. Project requests are published as XML messages. The main source records for project request data are:

- BC_PROJ_REQUEST
- BC_COST_EST

PeopleSoft Project Portfolio Management performs these functions when it is integrated with PeopleSoft Program Management:

- Creates project requests and a high level business case for the request.
- Summarizes details for the business case.
- Submits project requests for approval.

When PeopleSoft Program Management is installed, if you click a link to the project request component pages in the PeopleSoft Program Management application, the system transfers you from the FSCM database to the Project Request page in the EPM database.

The URL ID for the EPM database is delivered as system data. To modify it, access PeopleTools, Utilities, Administration, URLs, and update the URL for the *EPM_INTERFACE* URL identifier. You need to set up single sign-on for a seamless link between the applications, otherwise the system requires that you sign on to the EPM database before it displays the Project Request Page.

See *PeopleTools Security PeopleBook: Setting up Digital Certificates and Single Signon.*

PeopleSoft Integration Broker

The system uses enterprise integration points (EIPs), also known as data publish and subscribe, across applications. EIPs simplify cross-product integration and automate data transport by providing a predefined structure of the data message among involved parties. You must use PeopleSoft Integration Broker to set up messages and message channels.

It is recommended that you read the following:

- *PeopleTools PeopleBook: PeopleSoft Integration Broker,* "Understanding Integration Broker," Integration Broker Monitor.
- *PeopleTools PeopleBook: PeopleSoft PeopleCode Developer's Guide,* "Using Methods and Built-in Functions," Understanding File Attachment Architecture.

Setting Up PeopleSoft Integration Broker

To set up and use the Integration Broker Gateway:

1. Read *PeopleTools PeopleBook: PeopleSoft Integration Broker,* "Understanding PeopleSoft Integration Broker" thoroughly.
2. Review the *PeopleTools PeopleBook: PeopleSoft Integration Broker* chapters to learn how to set up the Integration Broker Gateway.
3. Point the Integration Broker Gateway to the PeopleSoft EPM and FSCM databases following the instructions in the *PeopleTools PeopleBook: PeopleSoft Integration Broker.*
4. Install any additional files required by the PeopleBook instructions.

Activating Relevant Application Messages

To activate application messages:

1. Review the *Enterprise Integration PeopleBook* and read the chapter "Setting Up Application Messaging EIPs."
2. Application messages are initially delivered with an inactive status.

   For the PeopleSoft EPM database to share information with the FSCM database, you must activate the appropriate application messages in both databases.

   Activate these application messages for the listed channels:

Application Message Name	Direction	Remarks
Channel = PPK_CHANNEL		
PPK_PROJECT_DETAILS	PeopleSoft Project Portfolio Management to PeopleSoft Program Management. PeopleSoft Program Management to PeopleSoft Project Portfolio Management.	PeopleSoft Project Portfolio Management sends project request information to PeopleSoft Program Management. PeopleSoft Program Management sends project request information to PeopleSoft Project Portfolio Management.

Integrating with PeopleSoft Project Costing

PeopleSoft Project Costing is a prerequisite for implementing PeopleSoft Program Management and performs these functions:

- Collects time and cost data from these PeopleSoft applications: PeopleSoft Purchasing, PeopleSoft Time and Labor, PeopleSoft Time and Expense, and PeopleSoft Payables.
- Feeds cost data to the appropriate applications for analysis.

Integrating with PeopleSoft Resource Management

PeopleSoft Resource Management is not required for implementing PeopleSoft Program Management. When integrated with the program management system, PeopleSoft Resource Management enables project managers to:

- Search for qualified candidates to fulfill resource requirements.
- Assign and schedule resources.
- Create service orders to fulfill requirements for a project team.

To schedule labor resources for active, approved projects (or reserve them for pending projects), access the Resources page, and select the Assign (or Reserve) check box for that resource.

If the dates of the resource conflicts with an existing calendar entry, the system displays a message and you can either clear the assign check box to prevent overscheduling the resource, or override the conflict book the resource.

Resources are booked in PeopleSoft Resource Management based on the resource availability dates in the Resource Detail page. The resource detail page allows the resource to be scheduled for multiple discontinuous date ranges.

See Also

PeopleSoft Resource Management 8.8 PeopleBook, "Integrating PeopleSoft Resource Management with Other Applications," Understanding Integration with PeopleSoft Program Management

APPENDIX A

Configuring Batch Processes

This appendix discusses how to configure temporary tables for batch processing.

Configuring Temporary Tables for Batch Processing

When you run batch processes in parallel, you risk data contention and deadlocks on temporary tables. To avoid this, PeopleTools enables you to dedicate specific instances of temporary tables for each process. When PeopleSoft Application Engine manages a dedicated temporary table instance, it controls the locking of the table before use and the unlocking of the table after use.

When you decide how many temporary table instances to dedicate for a process, consider the number of temporary tables that the process uses. More instances result in more copies of the temporary tables on the system. For example, if a process uses 25 temporary tables and you have 10 instances for a process, you will have 250 temporary tables on the system.

If you run processes in parallel and all of the dedicated temporary table instances are in use, the performance of the process decreases. You need to find a balance that works for your organization.

Note. When you specify the number of instances, PeopleSoft Application Designer displays a list of the temporary tables for the process. Use the list to determine how many temporary tables each process uses.

Specify how many temporary table instances to dedicate for each of the following batch processes that can run in parallel in PeopleSoft Program Management:

- Project Request Estimate Update (PGM_SPREAD).

  PGM_SPREAD uses these temporary tables:

  - PGM_SACT1_TAO
  - PGM_SACT2_TAO
  - PGM_SCAL1_TAO
  - PGM_SCAL2_TAO
  - PGM_SCST1_TAO
  - PGM_SPRJ1_TAO
  - PGM_STM1_TAO
  - PGM_STM2_TAO
  - PGM_STM3_TAO

  - PGM_STM4_TAO
  - PGM_STM5_TAO
  - PGM_STM6_TAO
- Program Refresh (PGM_PROGRFSH).

  PGM_PROGRFSH uses these temporary tables:

  - PGM_DATE_TAO
  - PGM_HLT1_TAO
  - PGM_HLTH_TAO
  - PGM_RFSH_TAO

The PeopleTools documentation discusses the usage of temporary tables in detail and describes how to specify the number of instances.

If you run any of the PeopleSoft General Ledger COBOL processes, also configure the temporary tables for those processes. The *PeopleSoft General Ledger PeopleBook* discusses how to do this in detail.

See Also

PeopleTools PeopleBook: PeopleSoft Application Engine

PeopleSoft General Ledger 8.8 PeopleBook, “Optimizing General Ledger Performance”

APPENDIX B

Delivered Workflows for PeopleSoft Program Management

This appendix discusses delivered workflows for PeopleSoft Program Management.

See Also

Chapter 5, "Establishing Project Requests," Project Request Approval Workflow, page 44

Using PeopleSoft Applications PeopleBook

PeopleTools PeopleBook: PeopleSoft Workflow

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 worklow is only active if funding manager approval is required, which is established at the installation level by using the Program Management page (INSTALLATION_PGM) in the Installation Options component (INSTALLATION).

Preapproved Event

Event Description	This event is triggered when a project request approver approves a project request and submits it for approval to the funding department managers.
Action Description	The system sends a worklist item to all funding department managers of the departments listed in the cost departments on the Summary Cost/Benefits page (BC_EST_COST_BENFT), and changes the project request status to *Operationally Approved*.
Notification Method	Worklist

Workflow Objects

Event	PRE_PROCESS (PRE APPROVED)
Approval Rule Set	PPK_FUNDMGT_APPROVAL
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_PJ_FUNMGT_APPROVAL
Role	MANAGER, DIRECTOR_FUNDING, VICE_PRESIDENT

Return to Requester Event

Event Description	This event is triggered when a Funding Department manager clicks on the Returned button on the Funding Department Approval Page (PPK_FUND_APPROVAL).
Action Description	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 *Returned.*
Notification Method	Worklist

Workflow Objects

Event	RETURN_REQ (Return to Requester)
Approval Rule Set	PPK_FUNDMGT_APPROVAL
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_PJ_FUNMGT_APPROVAL
Role	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

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

Workflow Objects

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

Return Event

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

Workflow Objects

Event	RETURN_EVEN
Approval Rule Set	PPK_PROJ_APPROVAL
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_PRJ_APPROVE_ACTIVITY
Role	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.

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

Approver Send Email Event

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

Notification Method	Email

Workflow Objects

Event	Approver Send Email
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DENY_OWNER
Role	None

Notify Sponsor Event

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

Workflow Objects

Event	TO_SPONSOR
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DENY_OWNER
Role	None

Notify Project Manager Event

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

Workflow Objects

Event	PRJ_MGT
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DENY_OWNER

Role	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 is established at the installation level by using the Program Management page (INSTALLATION_PGM) in the Installation Options component (INSTALLATION).

Approver Send Email Event

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

Workflow Objects

Event	Approver Send Email
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DNY_FUND
Role	None

Notify Sponsor Event

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

Workflow Objects

Event	TO_SPONSOR
Approval Rule Set	None

Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DNY_FUND
Role	None

Notify Project Manager Event

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

Workflow Objects

Event	PRJ_MGT
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DNY_FUND
Role	None

Notification to Funding Manager

This section discusses the Notification to Funding Manager workflow.

Description

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

Workflow Objects

Event	Send Email mgts
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_EMAIL_ACTIVITY2
Role	None

Notification to Project Sponsor

This section discusses the Notification to Project Sponsor workflow.

Description

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

Workflow Objects

Event	BC Send Email
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_SUBMIT_ACTIVITY
Role	None

Request for Detail Project Plan

This section discusses the Request for Detail Project Plan workflow.

Description

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

Workflow Objects

Event	COSTING_PLAN
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_PJ_COST
Role	None

APPENDIX C

PeopleSoft Program Management Reports

This appendix provides an overview of PeopleSoft Program Management reports and enables you to view a summary tables of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on the CD-ROM with your documentation.

See Also

PeopleSoft PeopleTools PeopleBook: Process Scheduler

PeopleSoft Program Management Reports: A to Z

This table lists the PeopleSoft Program Management reports, sorted alphanumerically by report ID. These reports are all Crystal reports.

Report ID and Report Name	Description	Navigation	Run Control Page
PCY5065 Issues by Assigned To	Lists issues by the person to whom they are assigned.	Program Management, Reports, Issue, By Assigned To	RUN_PCY5065
PCY5070 Issues by Priority	Lists issues by priority.	Program Management, Reports, Issue, By Priority	RUN_PCY5070
PCY5075 Issues by Type	Lists issues by type.	Program Management, Reports, Issue, By Type	RUN_PCY5075
PCY5080 Issues by Status	Lists issues by status.	Program Management, Reports, Issue, By Status	RUN_PCY5080
PCY5085 Issues by Project/Activity	Lists issues per project, per activity.	Program Management, Reports, Issue, By Project/Activity	RUN_PCY5085
PCY5090 Issue Information	Lists issue details.	Program Management, Reports, Issue, Details	RUN_PCY5090
PGM1000 Review Program	Lists program details	Access Program Management, Program Tools, Review Program and click the Run Review Program Report link.	RUN_PGM1000

See Also

Chapter 7, "Managing Program and Project Issues," Generating Issue Reports, page 94

PeopleSoft Services Forecasting 8.8 PeopleBook, "Services Forecasting Feature Reports"

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method
In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type
In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree
In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing
A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree
A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table
A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date
A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger
Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set
In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event
In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization
In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event
A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process
In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file
Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group
In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components
In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment
In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping
You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section
In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section
In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable
In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load
In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality
In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location
Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task
In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode — PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event — An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture — The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement — In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context — In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

plan — In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context — In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template — In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance — In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

portal registry — In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list — In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule — In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag — Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data — In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object — In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction — In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing — In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object — In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data — Data that is extracted from a separate database and migrated into the local database.

REN server — Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester — In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role — Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user — A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up — In a tree, to roll up is to total sums based on the information hierarchy.

run control — A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID — A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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PeopleSoft®

PeopleSoft Program Management 8.8 Reports

December 2003

Open Source Disclosure

Contents

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- Related documentation.
- Comments and suggestions.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

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See Also

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Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

CHAPTER 1

PeopleSoft Program Management Reports

This appendix provides an overview of PeopleSoft Program Management reports and enables you to view a summary tables of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on the CD-ROM with your documentation.

PeopleSoft Program Management Reports: A to Z

This table lists the PeopleSoft Program Management reports, sorted alphanumerically by report ID. These reports are all Crystal reports.

Report ID and Report Name	Description	Navigation	Run Control Page
PCY5065 Issues by Assigned To	Lists issues by the person to whom they are assigned.	Program Management, Reports, Issue, By Assigned To	RUN_PCY5065
PCY5070 Issues by Priority	Lists issues by priority.	Program Management, Reports, Issue, By Priority	RUN_PCY5070
PCY5075 Issues by Type	Lists issues by type.	Program Management, Reports, Issue, By Type	RUN_PCY5075
PCY5080 Issues by Status	Lists issues by status.	Program Management, Reports, Issue, By Status	RUN_PCY5080
PCY5085 Issues by Project/Activity	Lists issues per project, per activity.	Program Management, Reports, Issue, By Project/Activity	RUN_PCY5085
PCY5090 Issue Information	Lists issue details.	Program Management, Reports, Issue, Details	RUN_PCY5090
PGM1000 Review Program	Lists program details	Access Program Management, Program Tools, Review Program and click the Run Review Program Report link.	RUN_PGM1000

CHAPTER 2

Report Samples

This chapter provides report samples.

For the online samples of these reports, see the PDF files that are published on CD-ROM with your online documentation.

Report ID: PGM1000-.RPT	PeopleSoft Program Management	Page No. 1
Run Control ID:	Review Program Report	Run Date 12/1/2003
PGM_REVIEW		Run Time 2:04:57 PM

Business Unit: US004 **Currency Cd:** USD

Program: ALL_US004 **Levels Displayed:** 1

Tree Level	Program	Parent Program	Project ID	Description	Project Manager	Project Status	Process Status	Health	Planned Cost Budget	Finalized Cost Budget	Cost Actuals	% Complete	Start Date	End Date	Number Issues	Number Deliverables
1	Yes		ALL_US004	All US004 Projects			Active				215,394.51		5/14/2002	6/11/2002	4	1
2	Yes	ALL_US004	CONSULTINGDIV	Consulting Division	Jennifer Luis		Active				215,394.51		5/14/2002	6/11/2002	3	
2	Yes	ALL_US004	0000000156	Build Office Campus	Susan Young		Active						9/1/2003	6/30/2006		
2	Yes	ALL_US004	0000000157	Build Office Campus	Susan Young		Active						9/1/2003	6/30/2006	1	1

Report ID: PCY1044-.RPT
Run Control ID:
COST

PeopleSoft Project Costing
Forecast Labor Cost Variance

Page No. 1
Run Date 11/7/2003
Run Time 2:05:45 PM

Business Unit: US005 **Currency Cd:** USD
Project ID: TECHNOLGYDIV **Base Unit of Measure:** MHR
Project Description: Technology Division

Activity ID	Actual Labor Cost	Forecast to Complete	Forecast Total Labor Cost	Total Labor Budget	Variance
000000000000001	11,000.00	5,600.00	16,600.00	11,000.00	5,600.00
000000000000002	40,000.00	15,320.00	55,320.00	40,000.00	15,320.00
000000000000003	120,000.00	47,880.00	167,880.00	120,000.00	47,880.00
Project Total	**171,000.00**	**68,800.00**	**239,800.00**	**171,000.00**	**47,880.00**

Report ID: PCY1046-.RPT
Run Control ID:
REVENUE

PeopleSoft Project Costing
Forecast Labor Revenue Variance

Page No. 1
Run Date 11/7/2003
Run Time 2:17:04 PM

Business Unit: US005 **Currency Cd:** USD
Project ID: TECHNOLGYDIV **Base Unit of Measure:** MHR
Project Description: Technology Division

Activity ID	Labor Revenue Recognized	Labor Revenue to be Recognized	Forecast to Complete Revenue	Forecast Labor Revenue Total	Budget Labor Revenue Total	Variance
000000000000001	0.00	0.00	8,400.00	8,400.00	10,000.00	-1,600.00
000000000000002	0.00	0.00	22,480.00	22,480.00	30,000.00	-7,520.00
000000000000003	0.00	0.00	71,820.00	71,820.00	80,000.00	-8,180.00
Project Total	**0.00**	**0.00**	**102,700.00**	**102,700.00**	**120,000.00**	**-17,300.00**

ISSUES BY ASSIGNED TO

BUSINESS UNIT: US004

ASSIGNED TO	PROJECT ID	ISSUE ID	ACTIVITY ID	PRIORITY	STATUS	ENTERED BY	DATE ENTERED
UNASSIGNED	POST-IMPLEMENT	000000000000002	PERFORMANCE	MEDIUM	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Too much time in between page clicks.					
	POST-IMPLEMENT	000000000000003	WORKFLOW	LOW	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Emails are not getting sent.					

Total Issues for UNASSIGNED: 2

ASSIGNED TO	PROJECT ID	ISSUE ID	ACTIVITY ID	PRIORITY	STATUS	ENTERED BY	DATE ENTERED
Kenneth Schumacher	POST-IMPLEMENT	000000000000001	PERFORMANCE	HIGH	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Performance Issues after Implementation					

Total Issues for Kenneth Schumacher: 1

End of Report

ISSUES BY PROJECT/ACTIVITY

BUSINESS UNIT: US004

PROJECT ID	ACTIVITY ID	ISSUE ID	PRIORITY	TYPE	STATUS	ENTERED BY	DATE ENTERED
POST-IMPLEMENT	PERFORMANCE	000000000000001	HIGH	TECH	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Performance Issues after Implementation					
		ASSIGNED TO: Kenneth Schumacher					
		000000000000002	MEDIUM	FUNC	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Too much time in between page clicks.					
		ASSIGNED TO: UNASSIGNED					

Total Issues for Project POST-IMPLEMENT Activity PERFORMANCE: **2**

PROJECT ID	ACTIVITY ID	ISSUE ID	PRIORITY	TYPE	STATUS	ENTERED BY	DATE ENTERED
POST-IMPLEMENT	WORKFLOW	000000000000003	LOW	MISC	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Emails are not getting sent.					
		ASSIGNED TO: UNASSIGNED					

Total Issues for Project POST-IMPLEMENT Activity WORKFLOW: **1**

End of Report

ISSUES BY STATUS

BUSINESS UNIT: US004

STATUS	PROJECT ID	ISSUE ID	ACTIVITY ID	PRIORITY	TYPE	ENTERED BY	DATE ENTERED
OPEN	POST-IMPLEMENT	000000000000001	PERFORMANCE	HIGH	TECH	Kenneth Schumacher	12/1/2003
		SUMMARY: Performance Issues after Implementation					
		ASSIGNED TO: Kenneth Schumacher					
	POST-IMPLEMENT	000000000000002	PERFORMANCE	MEDIUM	FUNC	Kenneth Schumacher	12/1/2003
		SUMMARY: Too much time in between page clicks.					
		ASSIGNED TO: UNASSIGNED					
	POST-IMPLEMENT	000000000000003	WORKFLOW	LOW	MISC	Kenneth Schumacher	12/1/2003
		SUMMARY: Emails are not getting sent.					
		ASSIGNED TO: UNASSIGNED					

Total Issues for Status OPEN: 3

End of Report

BUSINESS UNIT: US004

TYPE	PROJECT ID	ISSUE ID	ACTIVITY ID	PRIORITY	STATUS	ENTERED BY	DATE ENTERED
FUNC	POST-IMPLEMENT	0000000000000002	PERFORMANCE	MEDIUM	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Too much time in between page clicks.					
		ASSIGNED TO: UNASSIGNED					
Total Issues for Type FUNC:		**1**					
MISC	POST-IMPLEMENT	0000000000000003	WORKFLOW	LOW	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Emails are not getting sent.					
		ASSIGNED TO: UNASSIGNED					
Total Issues for Type MISC:		**1**					
TECH	POST-IMPLEMENT	0000000000000001	PERFORMANCE	HIGH	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Performance Issues after Implementation					
		ASSIGNED TO: Kenneth Schumacher					
Total Issues for Type TECH:		**1**					

End of Report

ISSUES BY PRIORITY

BUSINESS UNIT: US004

PRIORITY	PROJECT ID	ISSUE ID	ACTIVITY ID	TYPE	STATUS	ENTERED BY	DATE ENTERED
HIGH	POST-IMPLEMENT	000000000000001	PERFORMANCE	TECH	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Performance Issues after Implementation					
		ASSIGNED TO: Kenneth Schumacher					

Total Issues for Priority HIGH: **1**

PRIORITY	PROJECT ID	ISSUE ID	ACTIVITY ID	TYPE	STATUS	ENTERED BY	DATE ENTERED
LOW	POST-IMPLEMENT	000000000000003	WORKFLOW	MISC	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Emails are not getting sent.					
		ASSIGNED TO: UNASSIGNED					

Total Issues for Priority LOW: **1**

PRIORITY	PROJECT ID	ISSUE ID	ACTIVITY ID	TYPE	STATUS	ENTERED BY	DATE ENTERED
MEDIUM	POST-IMPLEMENT	000000000000002	PERFORMANCE	FUNC	OPEN	Kenneth Schumacher	12/1/2003
		SUMMARY: Too much time in between page clicks.					
		ASSIGNED TO: UNASSIGNED					

Total Issues for Priority MEDIUM: **1**

End of Report

BUSINESS UNIT: US004

PROJECT ID: POST-IMPLEMENT
ISSUE ID: 000000000000001
ENTERED BY: Kenneth Schumacher **DATE ENTERED:** 12/1/2003
ACTIVITY ID: PERFORMANCE
PRIORITY: HIGH **TYPE:** TECH **STATUS:** OPEN
ASSIGNED TO: Kenneth Schumacher
SUMMARY: Performance Issues after Implementation
DESCRIPTION: Performance Issues after Implementation. App Server keeps crashing.

TARGET RESOLUTION DATE: 12/5/2003
ACTUAL RESOLUTION DATE:
RESOLUTION:

NOTES:	DATE ADDED	ADDED BY	DESCRIPTION
	12/1/2003 1:26:55PM	Kenneth Schumacher	Performance with App Server

ATTACHMENTS:	DATE ADDED	ADDED BY	DESCRIPTION

PROJECT ID: POST-IMPLEMENT
ISSUE ID: 000000000000002
ENTERED BY: Kenneth Schumacher **DATE ENTERED:** 12/1/2003
ACTIVITY ID: PERFORMANCE
PRIORITY: MEDIUM **TYPE:** FUNC **STATUS:** OPEN
ASSIGNED TO: UNASSIGNED
SUMMARY: Too much time in between page clicks.
DESCRIPTION: Too much time lapses in between page clicks.

TARGET RESOLUTION DATE:
ACTUAL RESOLUTION DATE:
RESOLUTION:

NOTES:	DATE ADDED	ADDED BY	DESCRIPTION

ATTACHMENTS:	DATE ADDED	ADDED BY	DESCRIPTION

BUSINESS UNIT: US004

PROJECT ID: POST-IMPLEMENT
ISSUE ID: 000000000000003
ENTERED BY: Kenneth Schumacher **DATE ENTERED:** 12/1/2003
ACTIVITY ID: WORKFLOW
PRIORITY: LOW **TYPE:** MISC **STATUS:** OPEN
ASSIGNED TO: UNASSIGNED
SUMMARY: Emails are not getting sent.
DESCRIPTION: Check SMTP setup - email notifications of workflow are not getting sent.

TARGET RESOLUTION DATE:
ACTUAL RESOLUTION DATE:
RESOLUTION:

NOTES:	DATE ADDED	ADDED BY	DESCRIPTION

ATTACHMENTS:	DATE ADDED	ADDED BY	DESCRIPTION

End of Report