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PeopleSoft Program Management 9.1 PeopleBook

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PeopleSoft Program Management Preface

This preface discusses:

- PeopleSoft products.
- 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 Products

This PeopleBook refers to these PeopleSoft products and product lines:

- PeopleSoft Asset Management
- PeopleSoft Contracts
- PeopleSoft Expenses
- PeopleSoft Financial Management Solutions
- PeopleSoft General Ledger
- PeopleSoft Human Resources Management
- PeopleSoft Information Technology Asset Management
- PeopleSoft Maintenance Management
- PeopleSoft Order Management
- PeopleSoft Performance Management
- PeopleSoft Project Costing
- PeopleSoft Project Portfolio Management
- PeopleSoft Proposal Management
- PeopleSoft Resource Management
- PeopleSoft Enterprise Service Automation
- PeopleSoft Enterprise Service Automation Portal Pack

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PeopleSoft Application Fundamentals

The *PeopleSoft Program Management PeopleBook* provides you with implementation and processing information for your PeopleSoft Program Management system. However, additional, essential information describing the setup and design of your system resides in companion documentation. The companion documentation consists of important topics that apply to many or all PeopleSoft Enterprise applications across the Financial Management Solutions, 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 PeopleBook*
- *Setting Up PeopleSoft Global Options and Reports PeopleBook*
- *PeopleSoft Project Costing PeopleBook*
- *PeopleSoft Resource Management 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 Developer's Guide.*

PeopleBooks and the PeopleSoft Online Library

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

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.
- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.

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- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

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 that is defined for the project and summing all actual amounts in that analysis group with an accounting date that occurs on or before today's date.
Activity ID (activity identifier)	Unique identification code for an activity.
Actual Work	The actual number of hours that are spent by a labor resource on an activity. Actual work is captured in the Project Activity Team table (PROJ_ACT_TEAM) from hours recorded on PeopleSoft Expenses time reports. The system calculates actual work at the activity level by rolling up the detailed actual rows.
As of Date	The 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.

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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. To determine this value within PeopleSoft Program Management, the system:

1. Determines the budget date as *Activity Start Date + (Duration × Percent Complete* ÷ 100)
2. Uses the budget analysis group on the Project Costing Definition page and sums all budget amounts in that analysis group with an accounting date that occurs after the activity start date and before or on the budget date.

Budgeted Cost of Work Scheduled (BCWS)

The budgeted costs up to the end date of the specified time period. Using the Budget Analysis group on the Project Costing Definition page, this value is the sum of all budget amounts in that analysis group with an accounting date that occurs on or after the activity start date and before or on the end date of the specified period.

Cost Performance Index (CPI)

Ratio of work accomplished versus the cost of work incurred for a specified time period. The CPI is an efficiency rating for work accomplished for the resources expended.

Duration

Duration is the length of time that is needed to complete an activity. More precisely, it is 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 is July 1. The effective date also determines when you can view and change the information. Pages and batch processes that use information with an effective date use the current row.

See "Using Effective Dates" in the *PeopleTools PeopleBook: Using PeopleSoft Applications.*

EmplID (employee identification)

Unique identification code for an individual who is associated with your organization.

Enterprise Program Tree

A hierarchical structure of projects and programs that are created and managed using PeopleSoft Tree Manager. In this tree, the root node must be a program, under which can contain multiple programs and detail projects. You establish an enterprise program tree 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.

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Forecast

Estimates or predictions of conditions and events in the project's future based on information and knowledge available at the time of the forecast.

In PeopleSoft Program Management, forecasts are used in two ways, estimate at completion (EAC) and in the Services Forecasting feature.

EAC is the expected total cost of a schedule activity or project when the defined scope of work will be completed. EAC is the sum of ACWP and ETC. The EAC may be calculated based on performance to date or estimated by the project team based on other factors.

Services Forecasting is a feature in PeopleSoft Program Management that enables you to collect labor resource estimates of hours that they will spend on a project or activity and compare them to budgeted hours and actual workforce utilization.

Forecast Horizon

The period of time for which a resource is expected to forecast hours at a detailed level. This is used only with the Services Forecasting feature.

Forecast Period

The frequency at which resources are expected to update and submit forecasted hours. This is used only with the Services Forecasting feature.

Generic Resource

A resource that does not have an ID to which it is associated. This could be a labor resource with no employee ID, an asset resource with no asset ID, or a material resource with no item ID. You can identify a generic resource by entering the name of the generic resource when you need to assign a resource to an activity, but the specific employee, asset, or item has not yet been identified.

Percent Complete

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

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

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Program	A vehicle for grouping detail projects for the purpose of reporting and management. A program cannot have activities or resources to which is it directly associated .
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 associated activities and resources, or a program.
Project Charging Level	The specified level of the work breakdown structure (WBS) at which you create budgets and capture costs for a project. The project charging level can be WBS level 1, level 2, level 3, or all detail activities.
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 Units.*
Schedule Performance Index (SPI)	Ratio of work that is accomplished versus work that is planned for a specified time period. The SPI is an efficiency rating for work accomplishment that compares 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, which are also known as records, that are necessary to define a company's structure and processing options.

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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.
Time Report Charging Level	The specified level of the WBS at which you will capture time report information in PeopleSoft Project Costing. The time report charging level can be WBS level 1, level 2, level 3, or all detail activities, and can be different than the project charging level.
User ID	The 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 an activity can be five days, but the work assigned to the activity might be 80 hours with two resources working on the activity. You define work in hours at the activity level.
Work Breakdown Structure (WBS)	A visual representation of a project, typically in a hierarchical view or Gantt chart view that shows project activities.

See Also

"Understanding PeopleSoft Process Scheduler" in *PeopleTools PeopleBook: PeopleSoft Process Scheduler.*

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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.
- Services forecasting.
- Modeling and analysis.

Program Management

A program is an initiative that is composed of one or more projects. Usually a theme is associated with a program, and all the projects that are within a program support that theme. You establish a tree, which is 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 that are within a program are summarized at the program level, enabling program managers to quickly and easily assess how well a program is progressing.

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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, schedule activities, assign resources, and estimate project costs. These capabilities enable the organization to harness and organize the project plan data that exists in users' desktop project scheduling tool files. With PeopleSoft Program Management, project plan data can be aggregated and fully integrated with a back-office project accounting system.

Project management features include:

- Scheduling activities, assigning resources, assessing project health, and tracking costs.
- Managing the life cycle 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, change management, risk management, services forecasting, deliverables, and status reporting into the resource and project portfolio management business process.

Services Forecasting

Forecasts enable you to make better business decisions. With the Services Forecasting feature, you can forecast resource hours spent on a project or activity, compare them to budgeted hours, analyze and reestimate project costs, and review workforce utilization.

You also need to anticipate the supply and demand of resources versus new projects. Once you assign resources to tasks and begin tracking work efforts, you can use the Services Forecasting feature to compare your workforce's actual utilization to the forecast, predict workforce utilization, and determine the best course of action based on the organization's objectives.

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.

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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 that is within PeopleSoft Resource Management, Project Costing, Expenses, and Project Portfolio Management 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 who are responsible for operationally and financially authorizing the initiation of a project or program.
    - Create bottoms-up business case justifications for a project or program.
- Create project.
    - Define the project scope and deliverables.
    - Define the tasks and work breakdown structure, schedule, dependencies, constraints, and milestones.
    - Establish a budget, if it's not predetermined.
    - Obtain the approval to begin project.
    - Define the resources.
- Assign resources to project.
    - Define the 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.
    - Track and manage changes.
    - Track and manage risks.
    - Review and forecast remaining work.

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- Manage Programs
  - Organize projects into programs.
  - Create program budgets.
  - Track progress of all projects under a program and monitor program health.
- Forecast Services.
  - Obtain updated work effort forecasts at regular intervals.
  - Review and approve forecasts at the project manager, supervisor, or administrator level.
  - Anticipate future resource utilization and examine past utilization.
  - Apply standard rates to forecasts to calculate cost and revenue estimates.

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 and generic resource requests.

- PeopleSoft Project Portfolio Management.

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

- PeopleSoft Expenses.

  Provides the forecast time data to analyze costs and revenue.

- PeopleSoft Maintenance Management.

  Provides resource requirements for work orders; creates work orders based on resource requirements in 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 that are responsible for installing and configuring the other applications to ensure that you obtain the full functionality and efficiency that the 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.*

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See Also

Chapter 3, "Integrating with Other Applications," page 13

PeopleSoft Program Management Implementation Tasks

PeopleSoft Setup Manager enables you to generate a list of setup tasks for an organization based on the features that you are implementing. The setup tasks include the components that you must set up, which are 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 planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface with information about where to find the most current version of each.

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Getting Started with PeopleSoft Project Costing"

PeopleTools PeopleBook: PeopleSoft Setup Manager

PeopleTools PeopleBook: PeopleSoft Component Interfaces

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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

PeopleTools PeopleBook: Using PeopleSoft Applications

Pages Used to Navigate in PeopleSoft Program Management

This table lists the custom navigation pages that you use to navigate in PeopleSoft Program Management:

Page Name	*Navigation*	*Usage*
Program Management Center	Program Management, Program Management Center	Access primary Program Management menu options and activities.
Configuration	Click the Configuration link on the Program Management Center page.	Access options for configuring Program Management.
Activity Options	Click the Activity Options link on the Configuration page.	Set up activity types, activity status, activity type status paths, and quality types.

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Page Name	*Navigation*	*Usage*
Common Definitions	Click the Common Definitions link on the Configuration page.	Set up interest types, period calculation factors, transaction codes, transaction types, report summarization options, the SQR report configuration, utilization definitions, and forecasting options.
General Options	Click the General Options link on the Configuration page.	Set up the organization hierarchy, accounting rules, transaction summary templates, change control templates, asset profiles, issue priorities, issue status, issue types, budget items, categories, application areas, applications, risk types, release types, and root cause areas.
Installation and Business Unit	Click the Installation and Business Unit link on the Configuration page.	Set up project costing business units, project costing options, program management options, project costing integration options, project costing installation options, program management installation options, and general installation options.
Pricing Structure	Click the Pricing Structure link on the Configuration page.	Set up rate sets, rates by employee, rates by job code, and rates by role.
Project Options	Click the Project Options link on the Configuration page.	Set up status report reminders, integration templates, project types, status types, project type status paths, project roles, phase types, events, and status report frequencies.
Project Request Options	Click the Project Request Options link on the Configuration page.	Set up initiative types, project request priorities, general preferences, and project request privileges.
Project Security	Click the Project Security link on the Configuration page.	Set up security profiles, security options, and row level security.
Transaction Options	Click the Transaction Options link on the Configuration page.	Set up analysis types, analysis groups, source types, source groups, categories, subcategories, and transaction identifiers. Relate source types to categories, and relate categories to subcategories.

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Page Name	*Navigation*	*Usage*
Forecasting	Click the Forecasting link on the Program Management Center page.	Enter forecast time, review forecast time, review forecasts by project and by supervisor, establish forecast control, administer forecast cache for performance, populate time, send forecast email reminders, refresh capacity and utilization data, and load third party forecasts.
Maintain Preferences	Click the Maintain Preferences link on the Program Management Center page.	Modify and view user preferences for managing projects.
My Projects	Click the My Projects link on the Program Management Center page.	Create a personalized list of projects.
Program Budgeting	Click the Program Budgeting link on the Program Management Center page.	Create and modify program plans and details. Analyze program budget and project request data.
Program Tools	Click the Program Tools link on the Program Management Center page.	Review programs, assign projects and programs to an enterprise program tree, view master resource schedule, calculate health, roll up project and program start and end dates, load estimate to complete amounts, and refresh the enforce team by pool cache table.
Project and Activity	Click the Project and Activity link on the Program Management Center page.	Create, modify, and view project and activity information.
Activity Definitions	Click the Activity Definitions link on the Project and Activity page.	Create, modify, and view project activities, activity general information, activity status, and activity resources.
Project Definitions	Click the Project Definitions link on the Project and Activity page.	Create, modify, and view project, project general information, project status, project resources, and the project estimate summary. Manage generic resources, transfer assignments, and assign project resource pools.
Project Management	Click the Project Management link on the Program Management Center page.	Access the Manager Workbench and Resource Workbench. Add, modify, and view project deliverables, issues, risks, project and budget change requests, and status reports. Review cost, billing, and shared transactions, and the change control monitor.

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Page Name	*Navigation*	*Usage*
Project Requests	Click the Project Requests link on the Program Management Center page.	Create, modify, or view project request, and process currency conversions.
Reports and Analysis	Click the Reports and Analysis link on the Program Management Center page.	Review program management data using reports and interactive reports.
Interactive Reports	Click the Interactive Reports link on the Reports and Analysis page.	View program management interactive reports for earned value, earned value projection, actual and forecast, percent complete history, forecast to complete, utilization, resource list, change control, manager transaction review, and flexible analysis.
Reports	Click the Reports link on the Reports and Analysis page.	View program management reports for issues by assigned to, issues by priority, issues by type, issues by status, issues by project/activity, issue details, forecast labor cost variance, forecast labor revenue, and review program report.
Third Party Integration	Click the Third Party Integration link on the Program Management Center page.	Create and modify projects from Microsoft Project, update Microsoft Project with project data, manage the Microsoft Project integration details, and administer Microsoft integrators.

This table lists the custom navigation pages that you use to navigate to key areas for entering and viewing employee and project team member information:

Page Name	*Navigation*	*Usage*
Employee Project Center	Employee Self-Service, Employee Project Center	Access key areas for entering and viewing project team member information.
Expenses	Click the Expenses link on the Employee Project Center page.	Create or view expense data and maintain your expense profile.
Program and Project Tools	Click the Program and Project Tools link on the Employee Project Center page.	Create, modify, or view project issues and risks, and modify or request projects.
Project Progress	Click the Project Progress link on the Employee Project Center page.	Modify or view the status of projects and deliverables, and view a summary of status reports, issues, or deliverables that are assigned to you.

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Page Name	*Navigation*	*Usage*
Resource Information	Click the Resource Information link on the Employee Project Center page.	Search for assignments, view your schedule, and maintain your resource profile.
Time	Click the Time link on the Employee Project Center page.	Create or view actual and forecast time data.

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Chapter 3

Integrating with Other Applications

This chapter discusses:

- Integration with PeopleSoft Project Portfolio Management.
- Integration with PeopleSoft Project Costing.
- Integration with PeopleSoft Resource Management.
- Integration with Microsoft Project.

Integration with PeopleSoft Project Portfolio Management

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

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

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

Understanding Integration with PeopleSoft Project Portfolio Management

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

- BC_PROJ_REQUEST
- BC_COST_EST
- PGM_RELEASE
- PGM_CATEGORY
- PGM_APPLAREA
- PGM_APPLICATION

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PeopleSoft Project Portfolio Management performs these functions when it integrates 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 PeopleSoft Financials 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 "Setting up Digital Certificates and Single Signon" in *PeopleTools PeopleBook: Security Administration.*

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.

You should read the following documentation:

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

Activating Relevant Application Messages

To activate application messages:

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

   Activate this application message:

Application Message Name	***Direction***	***Remarks***
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.

Integration 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: Purchasing, Time and Labor, Expenses, and Payables.
- Feeds cost data to the appropriate applications for analysis.

Integration 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 projects, access the Resources page and select the *Committed* status for the *Resource Status* field for that resource.

If the dates of the resource conflict with an existing calendar entry, the system displays a message and you can either remove the resource from the Resources page or override the conflict and book the resource.

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

See Also

PeopleSoft Resource Management 9.1 PeopleBook, "Integrating PeopleSoft Resource Management with Other Applications," Understanding Integration with PeopleSoft Program Management

Integration with Microsoft Project

In PeopleSoft Program Management, you can:

- Import projects from Microsoft Project.
- Send and receive project data that you created in Microsoft Project.
- Load resources into PeopleSoft Program Management that you created in Microsoft Project
- Enable Microsoft Project to send email notifications about task status changes.

Integration with Microsoft Project is discussed in the PeopleSoft Project Costing PeopleBook.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Integrating with Microsoft Project."

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Chapter 4

Setting Up PeopleSoft Program Management Business Units

This chapter provides overviews of PeopleSoft Program Management setup and project charging levels, and discusses how to establish program management business unit options.

Understanding PeopleSoft Program Management Setup

PeopleSoft Program Management uses project business units that you set up in the Project Costing Business Unit Definition component (PC_BU_DEFN) when you implement PeopleSoft Project Costing. You can establish default values for PeopleSoft Program Management for each of the project business units. The default values appear on new projects that you create for the business unit. You can overwrite many of the business unit default values at the project and activity levels.

Understanding Project Charging Levels

This section provides overviews of project charging levels, the project charging level effect on PeopleSoft applications, and time report charging levels.

Project Charging Levels

Managing projects involves planning and managing activity work breakdown structures (WBSs) to ensure the successful, timely completion of projects. Project accounting involves tracking project costs against the cost breakdown structure, which is represented by project ChartFields. The level of WBS detail that you use for planning and managing projects might not be the appropriate level for tracking project costs. For example, the project manager might want to plan and track the progress of detailed activities; however, the project accountant might want to track and record costs at an aggregate level.

In PeopleSoft Program Management, you can use different levels of the WBS for project management and accounting by defining the WBS level at which you want to track project budgets, forecasts, and costs. You can specify a project charging level of WBS level 1, level 2, or level 3, and the system restricts charges to summary and detail activities that are in the specified level. You can also specify a project charging level of all detail activities, in which case you can capture costs on detail activities, but not on summary activities—regardless of an activity's WBS level. You can set up a default WBS level by business unit, which users can override when they create projects. WBS levels are defined on the Project Costing Options page.

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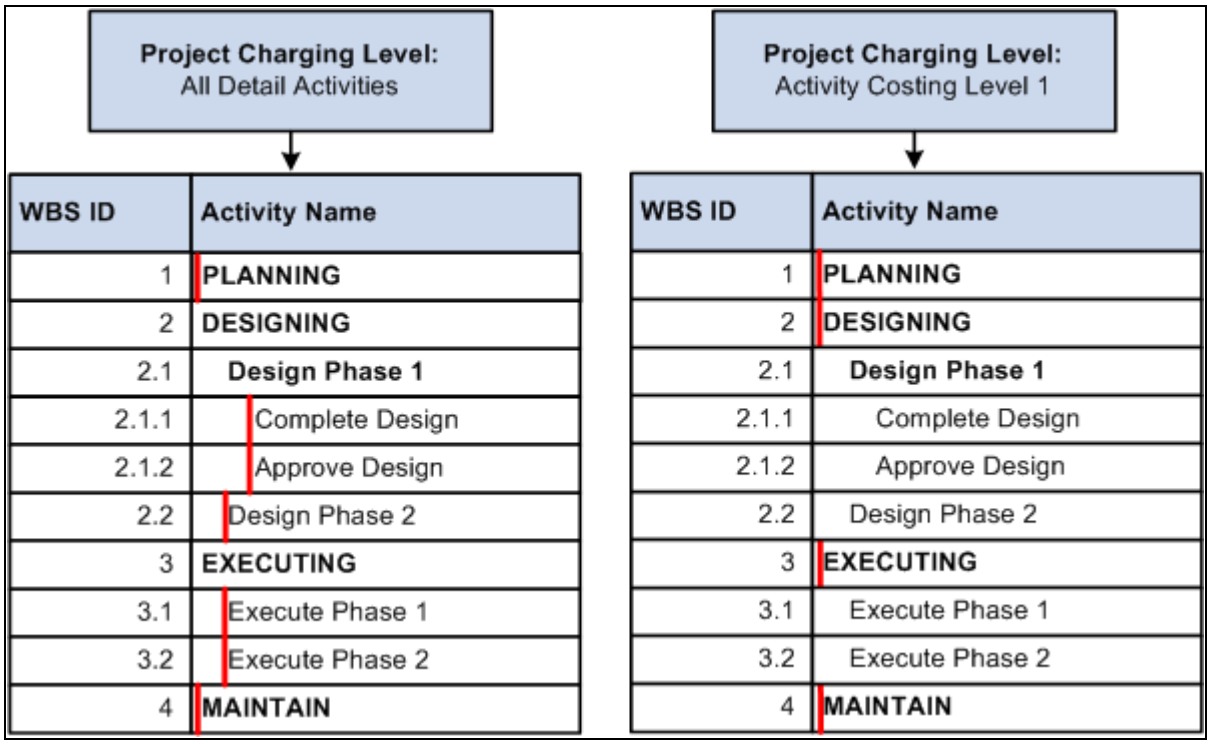
You can modify a project's charging level from all detail activities to WBS level 1, 2, or 3 for projects that are in a pending processing status. If you change the project charging level to a WBS level, and you previously entered budget transactions against a detail activity that is no longer in the specified charging level, an error message appears, indicating that budget details exist for activities that are outside the project charging level. You cannot finalize a budget plan that has budget transactions for activities that are outside the project charging level.

This diagram illustrates the activities that are available for charging based on the project charging level. In each example, the red vertical bars align with the activities to which to you charge:



Project charging level example

Project Charging Level Effect on PeopleSoft Applications

This table lists PeopleSoft Project Costing pages and processes that are affected by the project charging level:

PeopleSoft Project Costing Pages	*Project Charging Level Impact*
Budget Plan	You can finalize a budget when all summary budget amounts are distributed to budget items and periods for activities that are in the project charging level.

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PeopleSoft Project Costing Pages	*Project Charging Level Impact*
Budget Details	You can create budget entries and distribute project estimates only to activities that are in the project charging level. Activities down to and including the specified charging level are available for selection on this page. When you use the Get Plan feature to create budget details based on activity resources, if resource assignments exist on activities that are in a lower WBS level than the project charging level (a level in the WBS hierarchy that is more indented (deeper) than the current level), the system rolls the resource costs up to the project charging level for project budgets. You cannot create budget details for resources that are assigned to activities that are in a higher WBS level than the project charging level.
Budget vs. Actual	Only activities that are in the project charging level appear on this page for you to evaluate.
Create Project from Microsoft	You can select the project charging level and time report charging level for new projects that you create from Microsoft Project.
Microsoft Integration Options	You can select an option to import the entire detailed WBS for a project from Microsoft Project or import the WBS that contains only the project charging level activities.
Microsoft Integration Options and Project Activities	The project charging level controls when you can indent or outdent an activity to a different WBS level. You can move activities out of the project charging level to different WBS levels if no transaction rows exist for the activities in these tables: • Project Transactions Summary (PC_ACTIVITY_SUM) • Transactions Interface (INTFC_PROJ_RES) • Project Activity Team Member (PROJ_ACT_TEAM) • Project Costing Assets (PC_AM_PROJ_DEFN) • Project Budget Items (PC_BUD_ITEM) • Contract Line Project Details (CA_DETAIL_PROJ) • Forecast Time Detail (FC_TIME_DTL)
Project Costing Definition and Project Costing Options	You determine the number of WBS levels on the Project Costing Options page. You cannot enforce the expense time report security using activity resource pools if the project charging level is set to an activity costing level.

The project charging level also affects project integration with other PeopleSoft applications. For example:

- Charging level options for time reports determine whether PeopleSoft Expenses records and sends time report data for all detailed activities, or only for costing activities, to PeopleSoft Project Costing.

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- Microsoft Project integration options determine whether PeopleSoft software imports the detail WBS, or whether PeopleSoft software imports a partial WBS that includes only tasks up to the costing level.

  For example, the WBS that you use in Microsoft Project to plan the project might be elaborate, such as five or six levels deep. For costing purposes, however, you can specify WBS level 2 as the project charging level. If you select the Include only costing level WBS option on the Microsoft Integration Options page, the integration process imports only activities at WBS levels 1 and 2.

Time Report Charging Levels

If you use PeopleSoft Expenses, you can enter time reports for all detail activities, or specify the level of activities on the work breakdown structure (WBS) for which you want to capture time against a project. The level at which you capture costs for a project can be different from the level at which you report time in PeopleSoft Expenses.

This table lists the functionality for different combinations of project charging-level options and time-report charging-level options:

Project Charging Level Option	***Time-Report Charging Level Option***	***Functionality***
All Detail Activities	All Detail Activities	Select a project charging level of *All Detail Activities* to enter transactions on all detail activities (nonsummary), regardless of the WBS level of the activity. When you select this project charging level, the system selects a time-report charging level of *All Detail Activities*, and time report transactions are recorded in PeopleSoft Expenses and sent to PeopleSoft Project Costing at the detail activity level.

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Project Charging Level Option	*Time-Report Charging Level Option*	*Functionality*
Activity Costing Level	All Detail Activities	If you capture activity costs at the project charging level and enter time reports for all detail activities: • PeopleSoft Expenses records time report transactions for any detail activity. • During the PeopleSoft Expenses integration, the system summarizes detail transactions to the project charging-level parent activity, and sends the data to the Project Transaction table (PROJ_RESOURCE). • The Project Transaction table retains the original detail activity ID from the time report as a nonkey attribute. **Note.** The system calculates the amount of actual work completed from detail activities that reside in the Project Transactions table and displays the information on the Resources by Activity page. Even if you capture costs at the project charging level, the Project Transactions table retains the time report activity detail that you enter at the detail level.
Activity Costing Level	Activity Costing Level **Note.** You select this time report charging option by deselecting the All Detail Activities check box in the Charging Level for Time Report group box.	Select a project charging level of *Activity Costing Level* to restrict project charging to one specified level of the WBS—level 1, 2, or 3. Select a time report charging level of *Activity Costing Level* to charge time only to summary and detail activities that reside in the specified project charging level. **Note.** If you charge time reports only at the project charging level, the Project Transactions table will not contain the time report activity detail. Therefore, the actual work calculation for detail activities that are at a lower WBS level than the project charging level are not available on the Resources by Activity page.

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Establishing PeopleSoft Program Management Business Unit Options

To set up business unit options, use the Program Management Options component (PGM_BUS_UNIT_OPT).

This section discusses how to:

- Define business unit options.
- Define health options.

Pages Used to Establish PeopleSoft Program Management Business Unit Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Management Options	PGM_PROG_MGMT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Program Management Options	Define business unit options. You can specify program management options, designate the enterprise program tree, and establish various default settings for specific business units.
Health Options	PGM_BU_HLTH_OPT	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Health Options tab	Specify default project health options.

Defining Business Unit Options

Access the Program Management Options page (Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Program Management Options).

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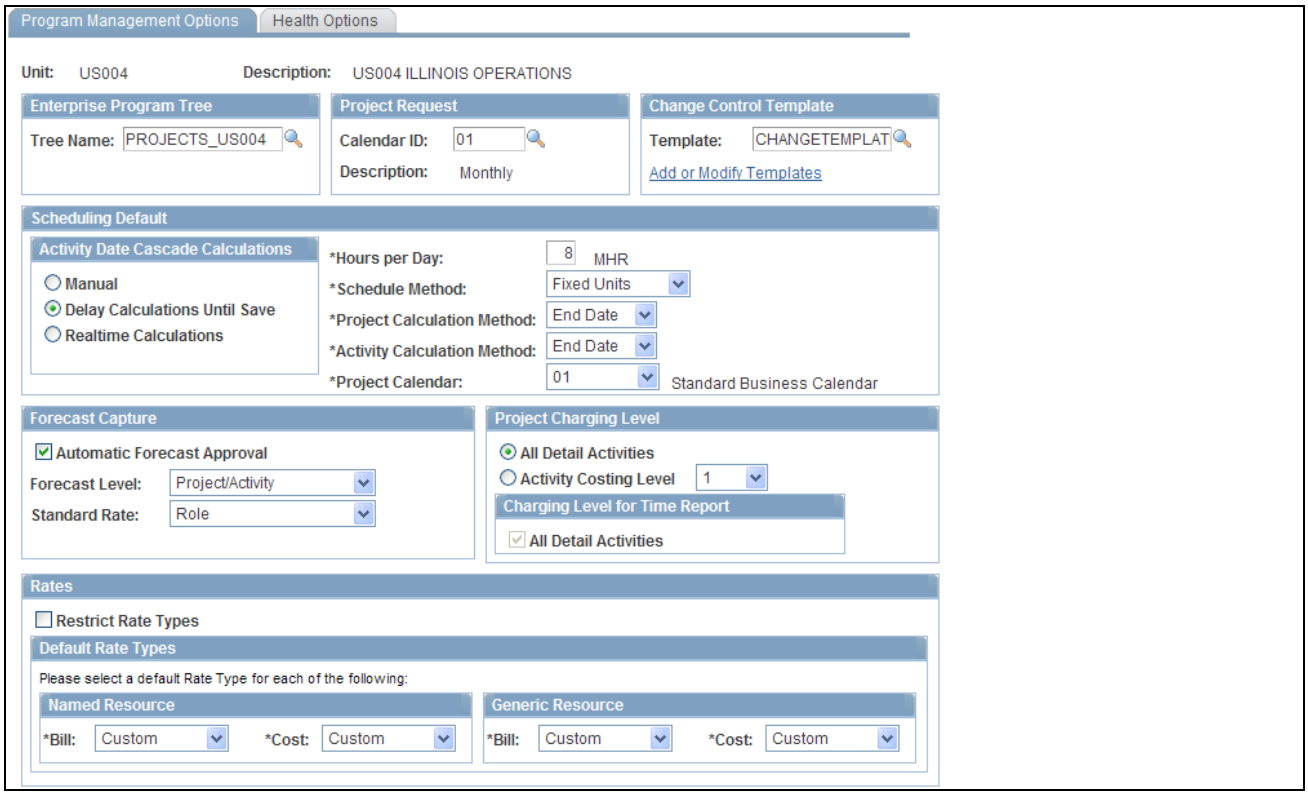

Program Management Options page

Enterprise Program Tree

The system uses the enterprise program tree to establish the relationships among all programs and projects that are within the business unit. You do not need to create and maintain enterprise program trees if the organization does not need to create a hierarchy of programs and detail projects for analysis and organization. However, if you want to take full advantage of the ability of PeopleSoft Program Management to create programs as umbrellas for detailed projects and other programs for the purposes of management, reporting, and analysis, you must maintain at least the programs and projects that you want to be able to analyze in the tree. Although you are not required to do so, you should enter and maintain all projects and programs in an enterprise program tree for maximum control, organizational clarity, and reporting sophistication with respect to the projects and programs.

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.

Initialize Enterprise Tree Click to create a new enterprise program tree for the business unit. You must enter the name of the new tree in the Tree Name field before you can initialize the tree.

See Chapter 7, "Managing Programs and Projects," Establishing and Maintaining Enterprise Program Trees, page 83.

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Project Request

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

Note. Avoid using daily detail calendars for project requests because such calendars result in many rows of data. Instead, use monthly calendars (preferred), or if you need more details for budgeting purposes, use weekly calendars.

Change Control Template

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

Add or Modify Templates Click to access the Change Control Template page, on which you can specify change control attributes for projects, activities, transactions, budget plans, resources, and estimates to complete.

See Chapter 16, "Controlling Project Changes," page 275.

Scheduling Default

Select an Activity Date Cascade Calculations option to determine how the system rolls up start and end dates on summary activities.

Manual Select to manually enter the start date, end date, and duration for projects on the Project General page and for activities on the Project Activities page. The system does not perform any date calculation.

Delay Calculations Until Save Select to have the system roll up activity start and end dates to summary activities at save time.

This is the default option in PeopleSoft Program Management.

Realtime Calculations Select to have the system roll up activity start and end dates to summary activities as soon as you change the detail activity dates.

Note. For optimal performance, do not select this option if you have large work breakdown structures, such as those with greater than 100 activities and four levels.

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Hours per Day

Enter the number of hours that define a work day for this business unit. The system uses this field to calculate the duration in days.

Schedule Method

Select 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.

  You should not select this option if you select *Duration* in the Project Calculation Method or Activity Calculation Method field.

- *Fixed Units:* When a schedule is calculated or recalculated, the variable that remains constant is the number of labor resource units that are 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**

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

- *Duration:* The duration is determined from the start date and end date that is entered for the project or activity. You should not select this option if you select *Fixed Duration* in the Schedule Method field.

- *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 that is entered for the project or activity.

Project Calendar

Select a default calendar to use for calculating schedules at the project and activity levels. The system uses this calendar to determine business holidays and nonwork days and to factor them into the calculation of start dates, end dates, and durations. If you use PeopleSoft Resource Management, the system does not schedule resources on project calendar holidays on assignments that are created in PeopleSoft Program Management.

Note. You can override each of these defaults, except for the project request *Calendar ID* for individual programs and projects.

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Forecast Capture

Automatic Forecast Approval Select to indicate that project managers do not have to approve forecasts to make them accessible to PeopleSoft Program Management for the purposes of time, cost, and revenue forecasts. Deselect 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 *Project* or *Project/Activity* to indicate the default level at which forecasting is to occur in this business unit for each project.

Warning! If forecasting occurs at the project level, the activity is not required when you enter a forecast. This affects the ability to report forecasts at the activity level. Select *Project* only if you do not need activity level time, cost, and revenue forecasts.

Standard Rate Select to determine where the system obtains standard cost rates and bill rates when generating estimates. Project estimates are based on the cost and bill rates that are associated with a job code, resource, or role.

Note. You can override these defaults for individual programs and projects.

Project Charging Level

Select options on this page to establish project charging-level options by default for new projects that you create for the business unit. You can override the business unit default values at the project level, for pending projects only, on the Project General - Program Management page. You can override the business unit default values for new projects that you create from Microsoft Project on the Create Project from Microsoft page.

All Detail Activities Select to enable users to charge transactions on all detail activities regardless of an activity's WBS level. This is the default project-charging level.

You must select this option if you want to select the Enforce Team option of Project Activity Resource Pool on the Project Costing Options page.

Activity Costing Level Select a costing level of *1*, *2*, or *3*, to restrict charging to a single costing level of the WBS. Users can charge to both summary and detail activities that reside in the specified costing level. This option is not available if the Enforce Team option on the Project Costing Definition page is *Project Activity Resource Pools.*

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Charging Level for Time Reports

Select All Detail Activities to enable time reporting in PeopleSoft Expenses at the detail level, even though all transactions are entered at the costing level.

Deselect this option to require time reporting at the same costing level as specified for the project.

Note. This group box appears if you use PeopleSoft Expenses and select an activity costing level for the project charging level. If you select All Detail Activities as the project charging level, the system automatically selects All Detail Activities as the time-report charging level.

See Chapter 7, "Managing Programs and Projects," Defining Program and Project Defaults, page 80.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Integrating with Microsoft Project," Creating PeopleSoft Projects from Microsoft Projects.

Rates

Restrict Rate Types

Select to restrict rate types for named and generic labor resources. Doing so limits the rate types that you can select for cost and bill rates on the Resources and Resources by Activity pages. Additionally, the rate options that are available on the Rate Sets - Target page are based on the rate types that you specify for the project business unit.

If you do not restrict rate types, select the default bill and cost rate types that appear on the Resources and Resources by Activity pages for named resources and generic labor resources.

Bill and **Cost** (Named Resource)

Select the specific bill and cost rate types that you want to be available when you add a named labor resource to the project or activity team. You can override the default rate type on the Resources and Resources by Activity pages with another rate type.

Available options are:

Custom: Users enter the resource's rate type when they add a resource.

Employee: The system assigns the rate that is set up for the employee on the Rates by Employee page in PeopleSoft Project Costing.

Job Code: The system assigns the rate that is set up for the employee's job code on the Rates by Job Code page in PeopleSoft Project Costing.

Project Role: The system assigns the rate that is set up for the employee's project role on the Rates by Role page in PeopleSoft Project Costing.

Bill and **Cost** (Generic Resource)

Select the specific bill and cost rate types that you want to be available when you add a generic labor resource to the project or activity team. You can override the default rate type on the Resources and Resources by Activity pages with another rate type.

Available options are Custom and Project Role.

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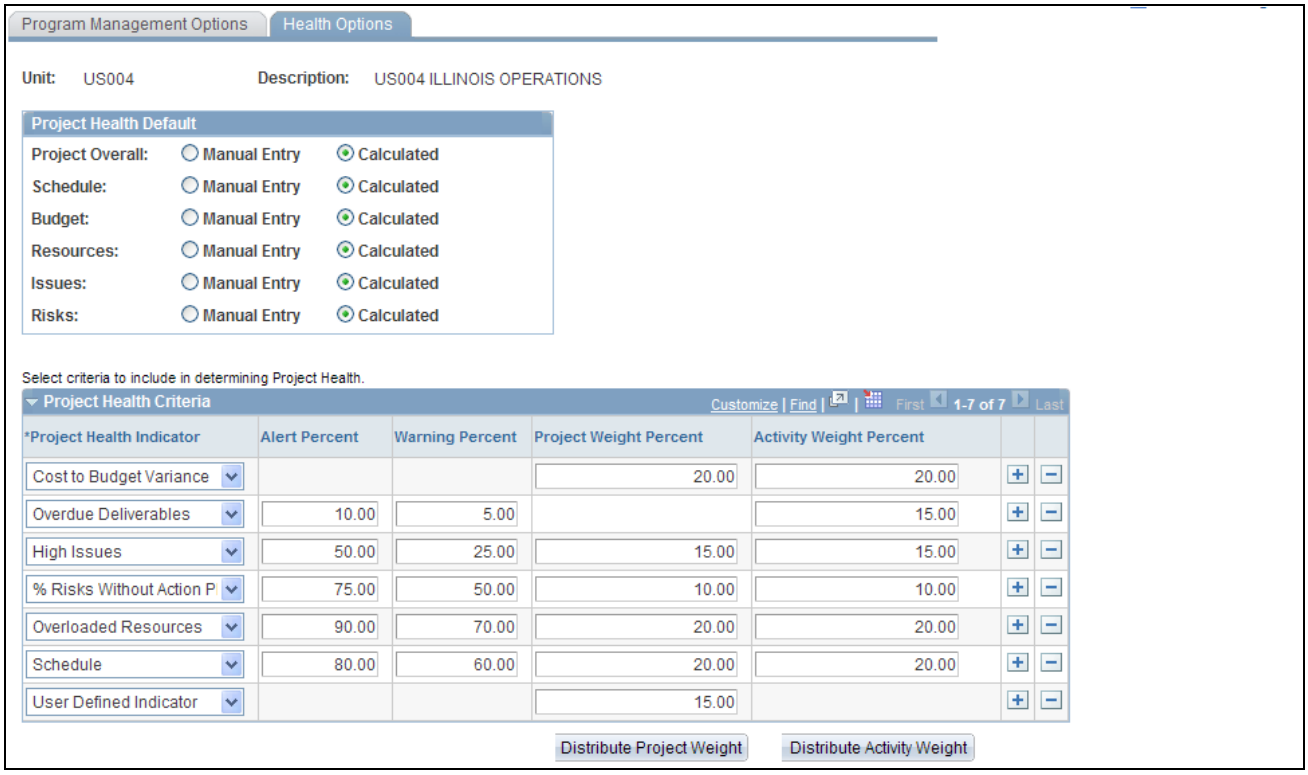
Defining Health Options

Access the Health Options page (Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Health Options tab).



Health Options page

Use this page to configure the project and activity health indicators that appear on the Manager Workbench page.

Project Health Default

Select the default method for calculating project health for Project Overall,Schedule,Budget,Resources,Issues, and Risks that are generated in the project business unit. Select from these options:

- Manual Entry: A project team member manually enters health values into the system. The system does not calculate any health values.
- Calculated: The system calculates the health value based on parameters that you define in the Project Health Criteria grid.

Note. You can override these defaults for individual programs and projects.

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Project Health Criteria

Project Health Indicator

Select one or more default health indicators that the system uses to measure how well a project or activity is doing in this business unit. The health indicators that you select appear on the Manager Workbench and Activity pages.

The indicator options are:

- *Blank* (none selected): The health indicator that is on the Manager Workbench page does not appear for any project or activity belonging to the specified business unit.
- *% Risks Without Action Plan:* Percentage of project risks that have no action plan for the selected activity on the Manager Workbench page, calculated as *(Number of project risks without an action plan ÷ Total number of project risks)* × 100.
- *Cost to Budget Variance:* The percentage difference between the project's actual and budgeted costs. The system calculates budget health based on the Budget Alert setup. Use the Budget Alerts page to set up the *Cost to Budget Variance* health indicator.

  See *PeopleSoft Project Costing 9.1 PeopleBook*, "Budgeting Project Costs and Revenue," Defining Budget Alert Thresholds.
- *High Issues:* The percentage of issues that are of high priority status for the selected project or activity on the Manager Workbench page, calculated as *(Number of high issues ÷ Total of all issues)* × 100.
- *Overdue Deliverables:* The percentage of the activity deliverables that do not meet their deadlines for the selected activity on the Manager Workbench, calculated as *(Number of overdue deliverables ÷ Total number of deliverables)* × 100.

  Note. This value applies only to activities; you cannot enter a project weight percent.
- *Overloaded Resources:* The percentage of resources that are overloaded or need to be rescheduled calculated as *(Number of overloaded resources) ÷ (Total number of resources)* × 100
- *Schedule:* The completion percentage for activities that do not meet their deadlines, calculated as *(Number of overdue activities ÷ Total number of activities)* × 100.
- *User Defined Indicator:* You manually enter the value into this field; the system does not calculate the value.

  Note. You can enter a user-defined indicator only for projects, so no weight is available to calculate overall activity health.

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Alert Percent Enter a numerical value that triggers an alert status (displayed as a red symbol) for the corresponding project health indicator. All project health indicators with calculated percent values that are equal to or higher than the alert percent trigger 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. All project health indicators with calculated percent values that are equal to or higher than the warning percent but less than the alert percent trigger a yellow warning status on the Manager Workbench page.

Project Weight Percent Enter the percent to weigh the health indicator for the project as compared to other health indicators. The system calculates overall project health as the weighted average of the health indicators.

Note. The sum of the project weight percents for all of the project health indicators must total 100 percent.

Activity Weight Percent Enter the percent to weigh the health indicator for the activity as compared to other health indicators. The system calculates overall activity health as the weighted average of the health indicators.

Note. The sum of activity weight percents for all of the project health indicators must total 100 percent.

Distribute Project Weight Click to evenly spread 100 percent to the project weight of each health indicator.

Distribute Activity Weight Click to evenly spread 100 percent to the activity weight of each health indicator.

Note. The health indicators on the Manager Workbench do not appear if you do not set up health criteria for them and you select the *Calculated* method to determine health for that indicator. A user can override the default method used to calculate project health at the project level. For example, you set the project health defaults at the business unit level to *Manual Entry* and you do not set up the project health criteria indicators. If a user changes the Project Health Default settings to *Calculated* for a particular project, the system will not have any project health criteria set up to determine how to calculate the health. Therefore, you should set up project health criteria for each project health indicator at the business unit level.

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Chapter 5

Setting Up PeopleSoft Program Management Control Data

This chapter provides overviews of general control data and project request options, and discusses how to:

- Set up general control data.
- Set up project request options.

Note. To set up status reporting options refer to the Reporting Project Status chapter in this PeopleBook.

Understanding General Control Data

This section provides an overview of general control data and change control templates.

General Control Data

PeopleSoft Program Management control data consists of optional information—releases, applications, application areas, and categories—that you can use to further classify new programs, projects, or project requests. Applications identify a module or specialty within a software product. Application areas group similar applications together. Categories further classify a project or project request. For example, you can use categories to identify strategic projects from operational ones.

Control data also consists of setup information required to create new issues and risks.

Change Control Templates

PeopleSoft Program Management provides you with the ability to track changes to projects and budgets. A change control template defines the level of control for attributes that are to be monitored. You can select which changes to track, whether they require a reason for the change, and whether a formal change request is required. You assign a default template at the business unit level, but it can be overridden at the project or activity level.

Understanding Project Request Options

This section provides an overview of project request options.

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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.

Note. If you intend to install and use PeopleSoft Project Portfolio Management in conjunction with PeopleSoft Program Management, users 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 set up the project request options in the PeopleSoft Financials database for PeopleSoft Program Management. Instead, you set up the project request options in the PeopleSoft Project Portfolio Management application. For instructions regarding the setup of project request options that are in the EPM database, refer to the *PeopleSoft Project Portfolio Management PeopleBook.*

Setting Up General Control Data

To set up general control data, use these components:

- Change Control Management (PC_CHC).
- Issue Priorities (PC_IM_PRIORITY).
- Issue Status (PC_IM_STATUS).
- Issue Types (PC_IM_TYPE).
- Project Category Setup (PGM_CATEGORY_SETUP).
- Application Area Setup (PGM_APPLAREA_SETUP).
- Application Setup (PGM_APPLICAT_SETUP).
- Project Risk Type (PGM_RISK_TYPE).
- Release Type (PGM_RELEASE_TYPE).
- Release Management (PGM_RELEASE).
- Root Cause Area Setup (PGM_RCA_SETUP).

This section discusses how to:

- Define change control templates
- Define issue priorities
- Define issue statuses
- Define issue types
- Define categories

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- Define application areas
- Define applications
- Define project risk types
- Define release types
- Define releases
- Define root cause areas

Pages Used to Set Up General Control Data

Page Name	*Definition 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.
Issue Priorities	PC_IM_PRIORITY	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Priorities	Define priorities that are used to classify activity, project, or program issues.
Issue Status	PC_IM_STATUS	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Status	Define statuses that are used to classify activity, project, or program issues.
Issue Type	PC_IM_TYPE	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Types, Issue Types	Define issue types that are used to classify activity, project, or program issues.
Category	PGM_CATEGORY_SETUP	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Category, Category	Define categories that are used to classify programs, projects, and project requests.
Application Area	PGM_APPLAREA_SETUP	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Application Area, Application Area	Define application areas used to group similar applications together. Applications identify a module or specialty within a software product.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Application	PGM_APPLICAT_SETUP	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Application, Application	Define applications used to identify a module or specialty within a software product.
Project Risk Types	PGM_RISK_TYPE	Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Risk Types, Risk Types	Define risk types and select the risk type status.
Release Type	PGM_RELEASE_TYPE	Setup Financials/SupplyChain, Product Related, Program Management, General Options, Release Type, Release Type	Define and maintain release types by setID.
Release	PGM_RELEASE	Program Management, Release Management, Release, Release	Create and edit release information.
Root Cause Area Setup	PGM_RCA_SETUP	Setup Financials/SupplyChain, Product Related, Program Management, General Options, Root Cause Area, Root Cause Area Setup	Define root cause areas that you can specify when you enter a project or budget change request.

Defining Change Control Templates

Access the Change Control Template page (Setup Financials/Supply Chain, Product Related, Program Management, General Options, Change Control Template).

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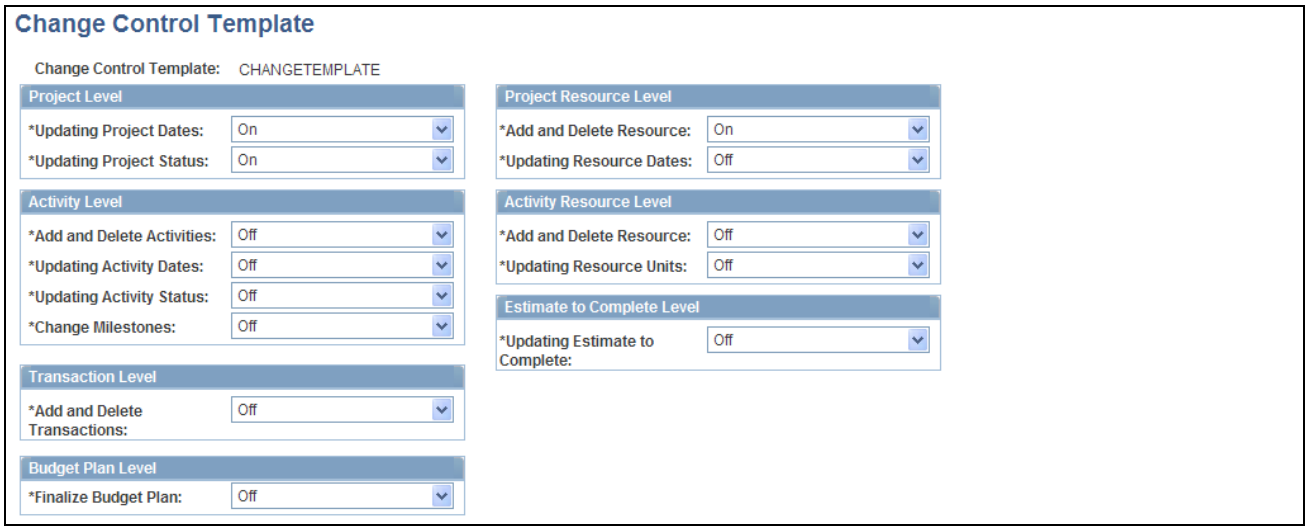

Change Control Template page

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:

Change Request Required Select to require users to enter a formal change request to change data for this attribute. This option is not available for project transactions.

Off Select to disable change control for this attribute. This is the default setting.

On Select to enable change control for this attribute. They system automatically generates the user name, change made, and date for the changes.

User Input Select to enable change control for this attribute and to require users to enter a reason for the change. When you select this option, the Change Control User Input page automatically appears after users save the changes. This option is not available for project transactions or estimate to complete changes.

Defining Issue Priorities

Access the Issue Priorities page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Priorities).

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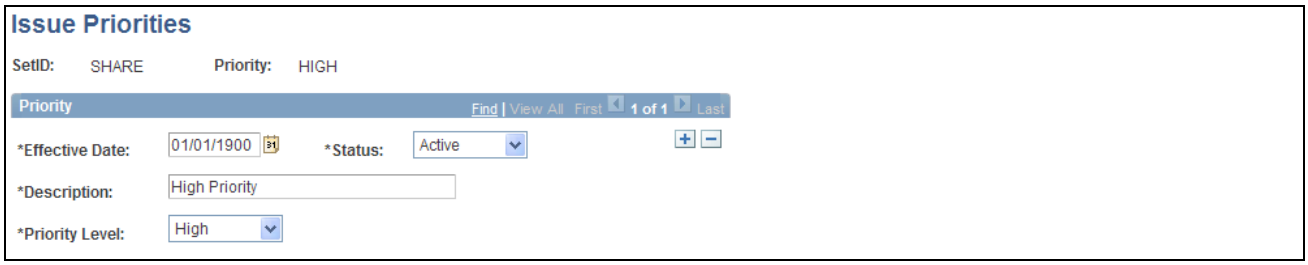


Issue Priorities page

PeopleSoft Program Management delivers issue priority values of *HIGH*, *MEDIUM*, and *LOW*. Add a new row on this page to inactivate a priority or enter a different priority description.

Select a Description value of *High*, *Medium*, or *Low* for the priority that you are defining. You can select these priorities when you enter or edit an issue using the Issue page.

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

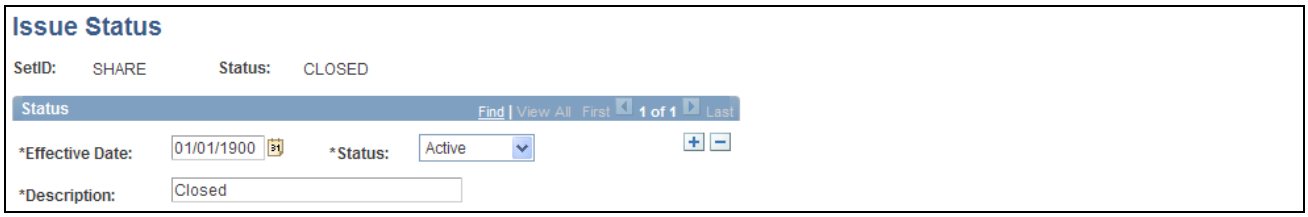
Red indicator	The system displays this symbol when the selected priority for an issue is mapped to the *high*priority level.
Yellow indicator	The system displays this symbol when the selected priority for an issue is mapped to the *medium* priority level.
Green indicator	The system displays this symbol when the selected priority for an issue is mapped to the *low* priority level.

See Also

PeopleSoft Financials, ESA, ALM, and SCM Portal Packs 9.1 PeopleBook, "Using Pagelets Enabled by PeopleSoft Program Management"

Defining Issue Statuses

Access the Issue Status page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Status).



Issue Status page

The statuses that you define on this page are available for selection when you enter or edit an issue using the Issue page. You must define issue statuses before you can enter an issue. Enter the effective date, status, and description for the issue status. You can select from only active issue statuses when you create an issue.

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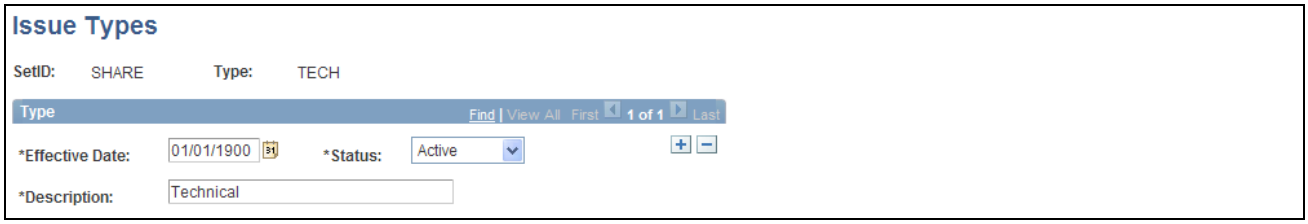
Defining Issue Types

Access the Issue Type page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Issue Types, Issue Types).

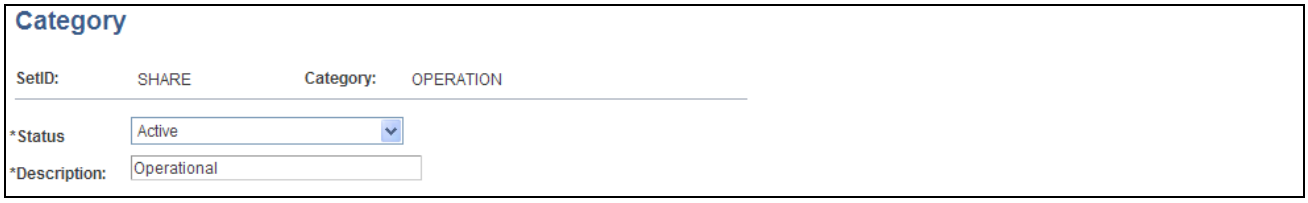


Issue Type page

The issue types that you define on this page are available for selection when you enter or edit an issue using the Issue page. You must define issue types before you can enter an issue. Enter the effective date, status, and description for the issue type. You can select from only active issue types when you create an issue.

Defining Categories

Access the Category page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Category, Category).

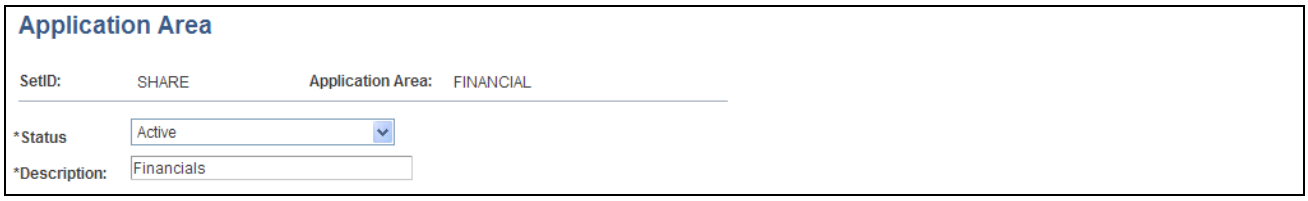


Category page

The categories that you define on this page are available for selection when you create or edit a project using the Project Definitions - General Information page. Enter the status and description for the category.

Defining Application Areas

Access the Application Areas page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Application Area, Application Area).



Application Area page

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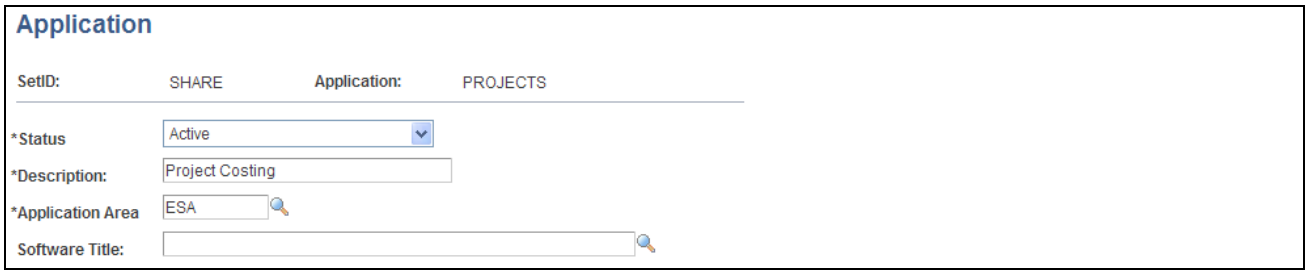
The application areas that you define on this page are available for selection when you create or edit a project using the Project Definitions - General Information page. Specify the status and description for the application area. You can select from only active application areas when you create applications.

Defining Applications

Access the Application page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Application, Application).



Application page

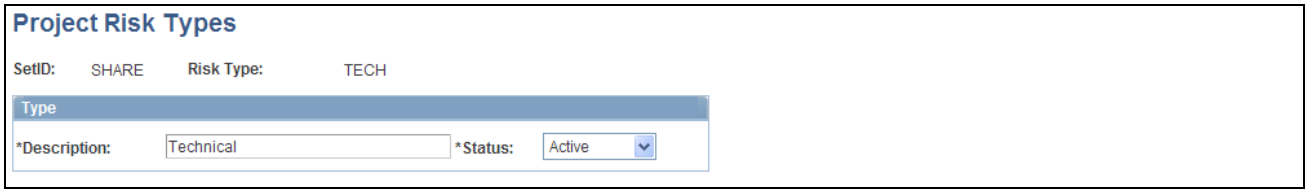
The application that you define on this page are available for selection when you create or edit a project using the Project Definitions - General Information page.

Application Area Enter the area to which the application belongs. An application can only belong to one application area. You must set up application areas before you can set up applications.

Software Title Select the software package to associate with this application. The field appears only if you have PeopleSoft Information Technology Asset Management installed.

Defining Risk Types

Access the Project Risk Types page (Set Up Financials/Supply Chain, Product Related, Program Management, General Options, Risk Types, Risk Types).



Project Risk Types page

Specify the description and status for the project risk type. You can select from only active project risk types when you create risks.

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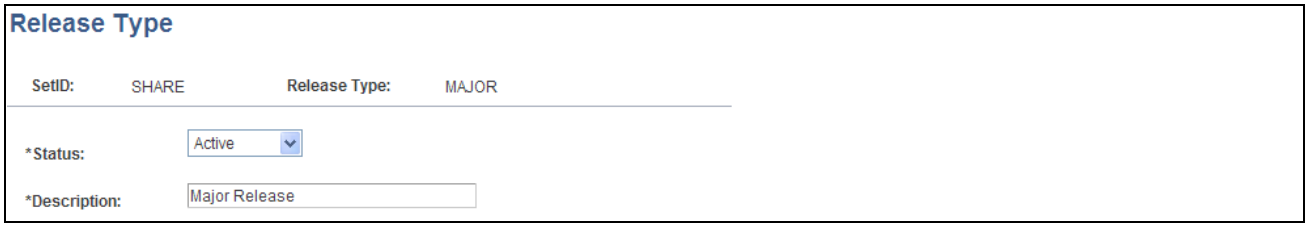
Defining Release Types

Access the Release Type page (Setup Financials/SupplyChain, Product Related, Program Management, General Options, Release Type, Release Type).

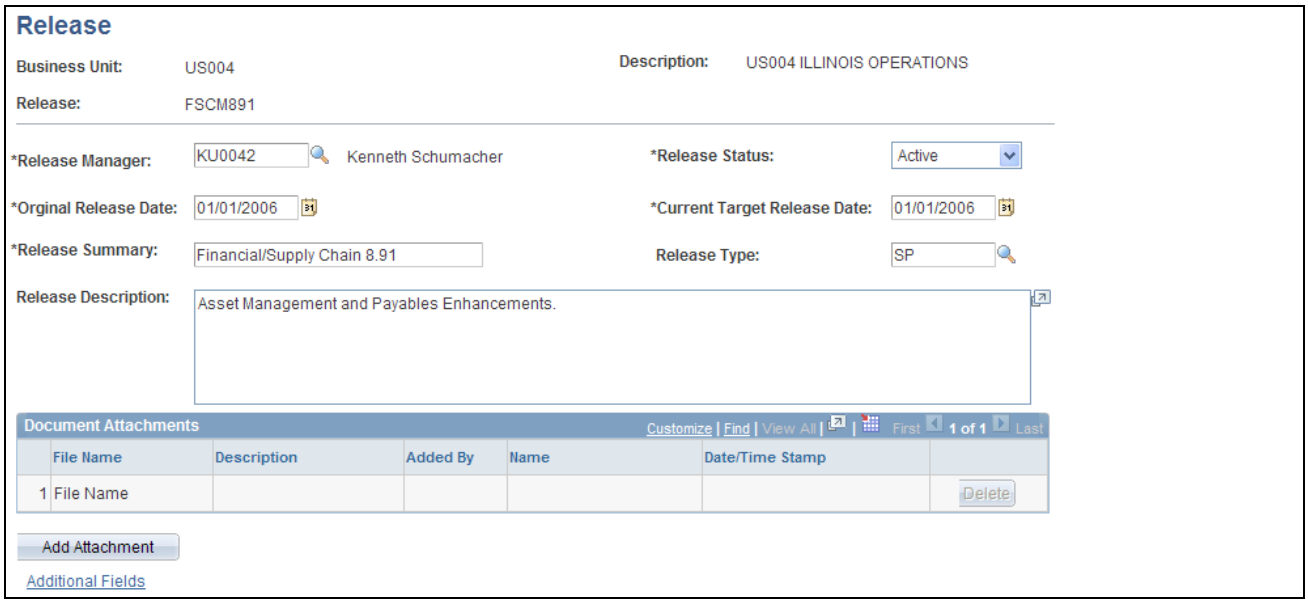


Release Type page

Specify the status and description for the release type. You can select from only active release types when you define a release.

Defining Releases

Access the Release page (Program Management, Release Management, Release, Release).



Release page

Release Manager Enter the employee ID of the person responsible for managing this release.

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Release Status Select the status of this release from these options:

- *Active:* Indicates that this is a current release.

  This is the default status for new releases.

- *Inactive:* Indicates that this is an old or cancelled release that remains in the system for historical purposes.

- *Pending:* Indicates that this is an upcoming release.

Note. For all of the online pages containing release information, the system displays only active or pending releases.

Original Release Date Enter the date on which this release is due. If the release date changes, enter the revised release date into the Current Target Release Date field.

Current Target Release Date Enter the revised target release date. For a new release, the default value for this field is the current date. For all of the online pages containing release information, the system displays the current target release date.

Release Type Enter the type of release. You must define release types on the Release Type page before you can select a release type for a release.

Additional Fields Click to access the Release Additional Fields page and enter additional information. The fields on the Release Additional Fields page are user-defined fields for informational purposes only.

Attachments

Add Attachment Click to add an attachment.

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

File Name Displays the name of the file that you upload.

Added By, Name, and **Date/Time Stamp** Displays information about the user who adds the attachment, and the date and time that the upload occurred.

Defining Root Cause Areas

Access the Root Cause Area Setup page (Setup Financials/SupplyChain, Product Related, Program Management, General Options, Root Cause Area, Root Cause Area Setup).

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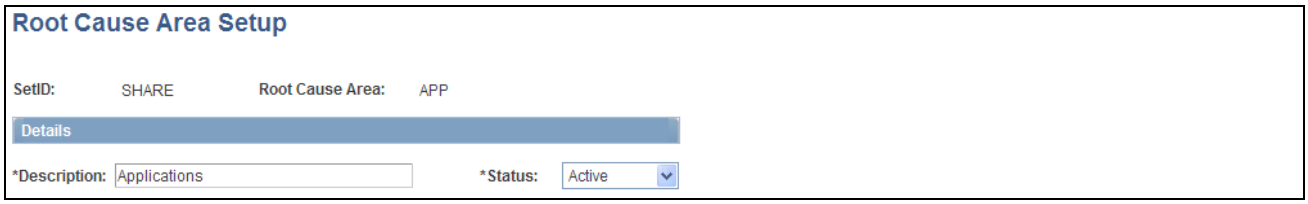

Root Cause Area Setup

You can specify a root cause area for informational purposes when you enter a project change request or a budget change request. Enter the root cause area description and status.

Setting Up Project Request Options

To set up project request options, use these components:

- Setup Prompt Tables (BC_GENERAL_PREF)
- Initiative Type Mapping (PPK_INITYPE_TBL)
- Setup Priority (PPK_PRIORITY_UPD)
- Project Request - Setup Update (BC_PROJ_ROL_ST)
- Project Request - Setup View (BC_PROJ_ROL_ST_VW)

This section discusses how to:

- Define prompt tables for department and account data.
- Define how the system generates project request IDs.
- Define the discount rate.
- Define the currency conversion rate type.
- Define initiative types.
- Define project request priorities.
- Define project request edit privileges.
- View edit privileges.

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Pages Used to Set Up Project Request Options

Page Name	*Definition 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 uses 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 set up this discount rate; however, as delivered, the interactive reports do not use this rate to generate financial metrics.
Conversion Rate Type	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.

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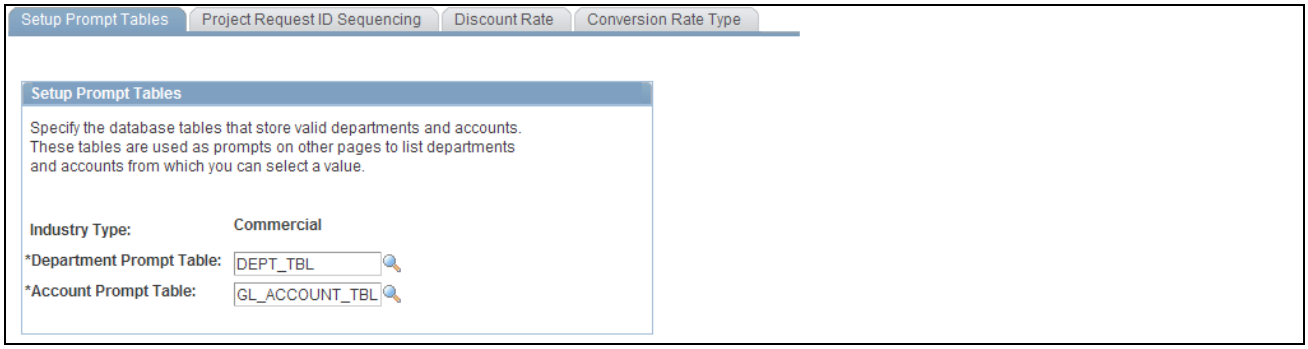
Page Name	Definition Name	Navigation	Usage
Privileges for Project Request	BC_PROJ_ROL_ST	• Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Setup Privileges • Click Add Role or click a <ROLENAME> on the Privileges for Project Request - Role Selection page.	Specify 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 (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Setup Prompt Tables).



Setup Prompt Tables page

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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). Selecting the record that accurately depicts the department hierarchy as defined within the general ledger business unit is critical. 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 accept this value, which is the standard department record that is used in the Financials database by all of the PeopleSoft Financials applications.

Account Prompt Table

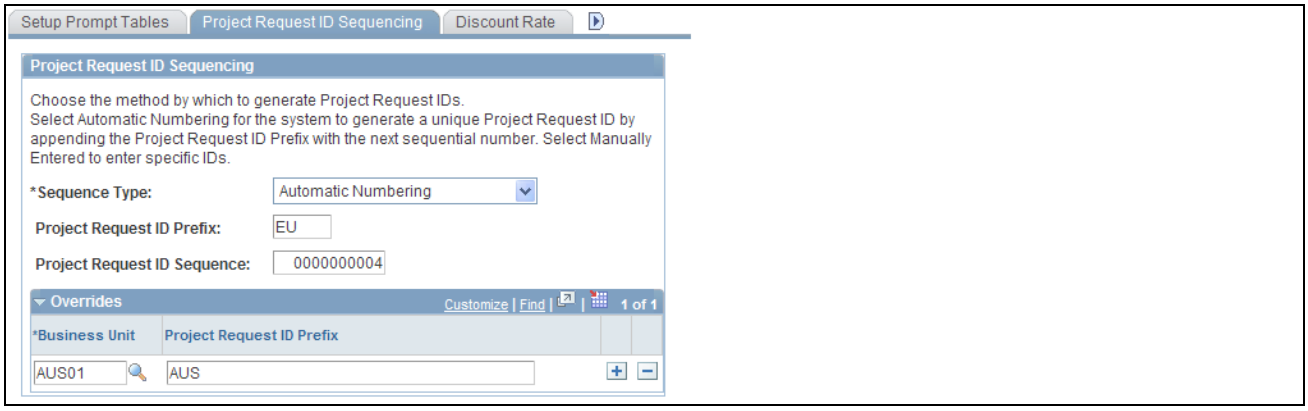
Select the table that contains account data.

The system uses this table as a prompt for valid account values on the Cost and Benefit pages of the Project Request component. Selecting the table that accurately depicts the account hierarchy as it's defined within the general ledger business unit is critical. 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 accept this value, which is the standard account record that is used in the Financials database by all of the PeopleSoft Financials applications.

Defining How the System Generates Project Requests IDs

Access the Project Request ID Sequencing page (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Project Request ID Sequencing).



Project Request ID Sequencing page

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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 prepending the project request ID prefix to the next number in sequence after the value that appears in the Project Request ID Sequence field.

Manually Entered: Select to enter project request ID numbers manually when you create new project requests.

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. The system increases this number by one when you create a new project request.

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, doing so after project requests exist could cause project request ID conflicts.

Overrides

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

Defining the Discount Rate

Access the Discount Rate page (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Discount Rate).

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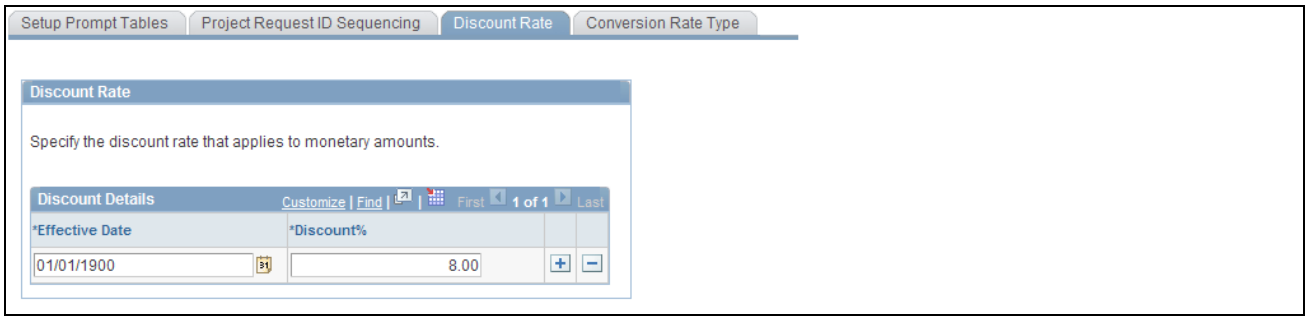


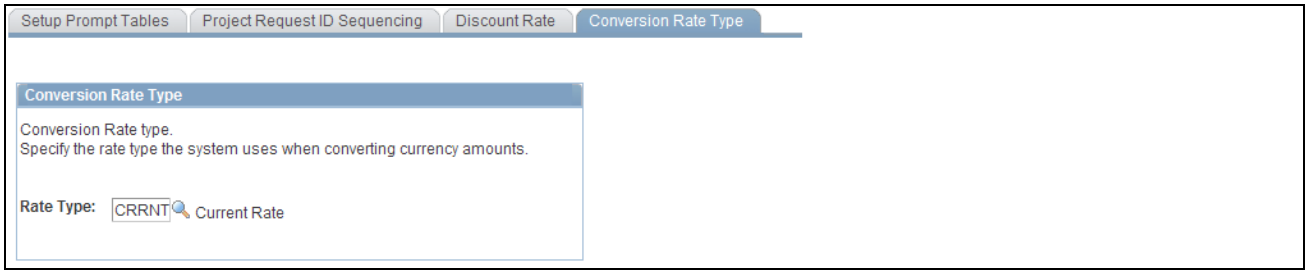
Discount Rate page

Effective Date Enter the date on which the discount percentage goes into effect. This allows you to change over time the rate at which the organization discounts cash flows.

Discount% (discount percentage) Enter the rate that 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.

Defining the Currency Conversion Rate Type

Access the Conversion Rate Type page (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, General Preferences, Conversion Rate Type).



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 (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Initiative Types).

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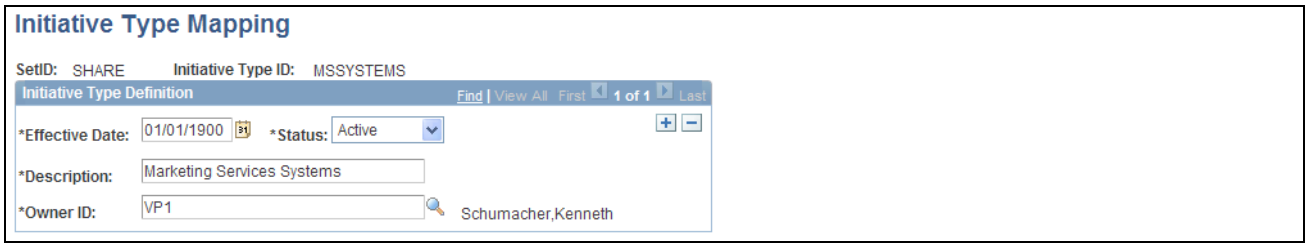


Initiative Type Mapping page

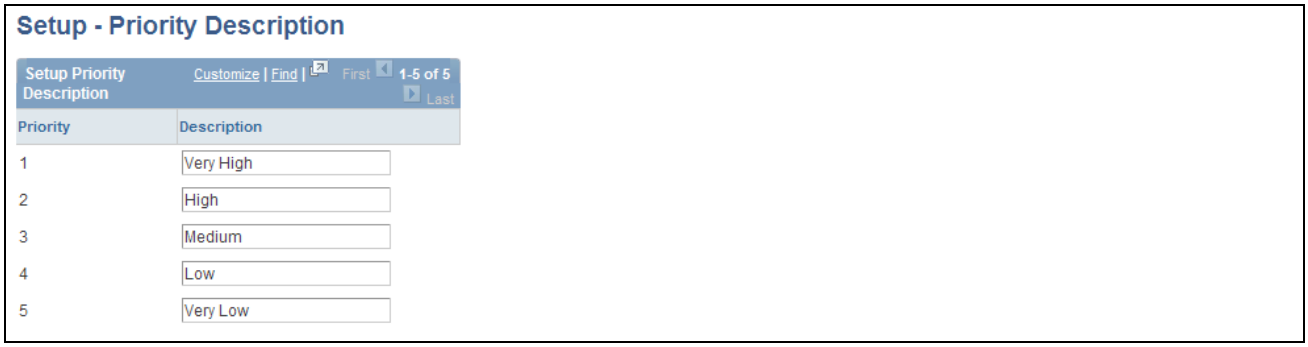
Initiative Type ID Displays the unique identifier for the initiative type.

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 (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Project Request Priorities).



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 Priority drop-down list box that is on the Project Request page.

Defining Project Request Edit Privileges

Access the Privileges for Project Request page (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, Setup Privileges).

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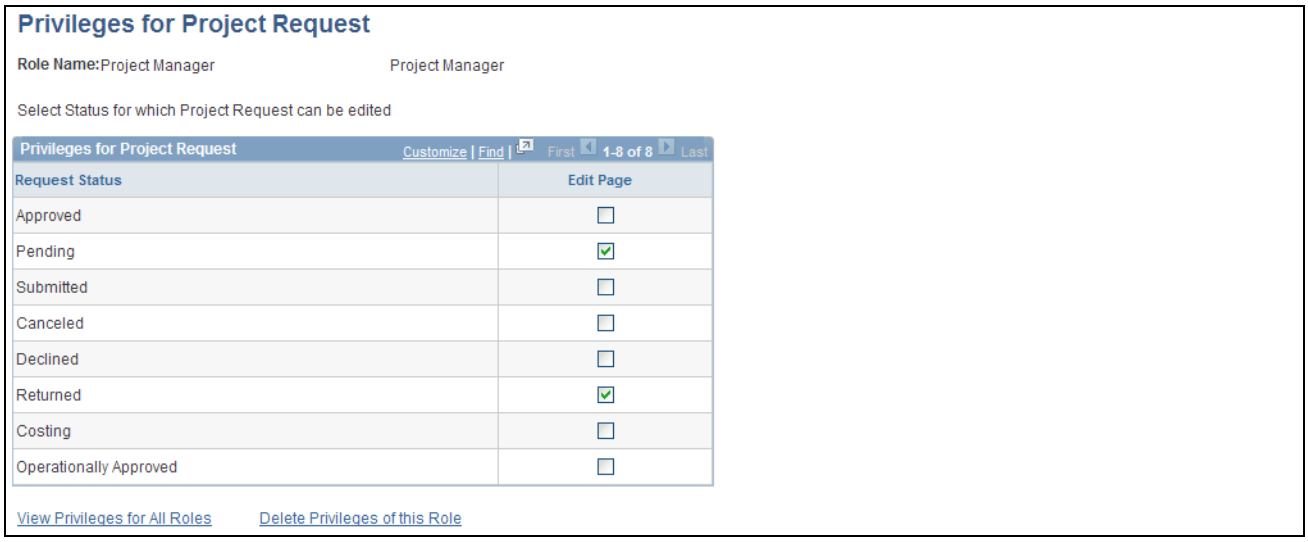

Privileges for Project Request page

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

Note. Use the sample data that is delivered with the 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 the implementation are Project Requester, Project Owner, Project Manager, and Manager.

View Privileges for All Roles Click to access the Privileges for Project Request page on which you can view a list of roles with their defined privileges. The list only displays roles for which you have defined privileges.

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

See Also

Chapter 8, "Establishing Project Requests," page 93

Viewing Edit Privileges

Access the Privileges for Project Request - Role Selection page (Set Up Financials/Supply Chain, Product Related, Program Management, Request Options, View Privileges).

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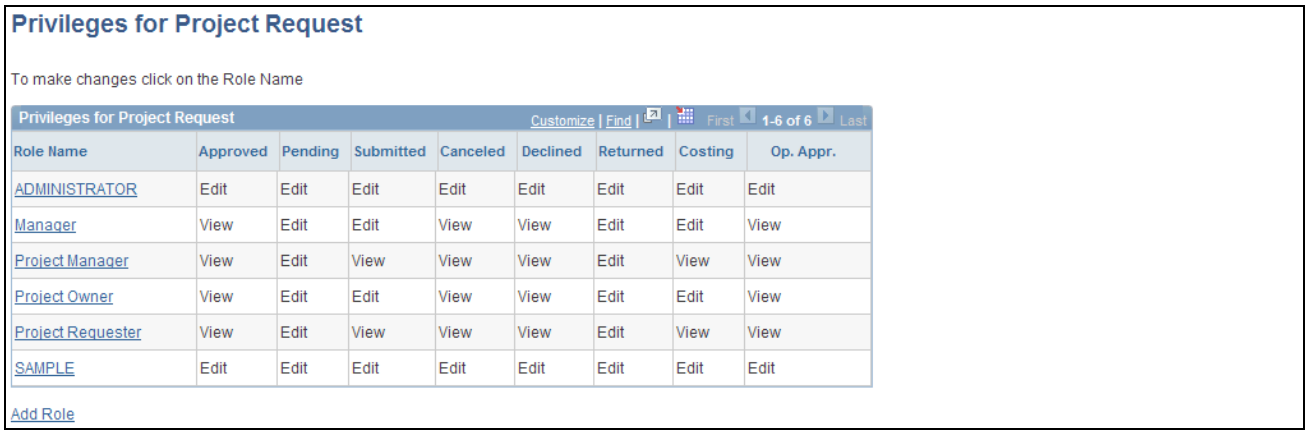

Privileges for Project Request

To make changes click on the Role Name

Privileges for Project Request — Customize | Find | First 1-6 of 6 Last

Role Name	Approved	Pending	Submitted	Canceled	Declined	Returned	Costing	Op. Appr.
ADMINISTRATOR	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
SAMPLE	Edit	Edit	Edit	Edit	Edit	Edit	Edit	Edit

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.

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

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

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Chapter 6

Setting Up Services Forecasting

This chapter provides an overview of the Services Forecasting feature and discusses how to:

- Grant security access to forecasts.
- Configure forecasts.
- Define services forecast options.
- Set up time reporting codes (TRCs) and map task categories.
- Establish forecast control.
- Refresh the forecast cache.
- Prepopulate forecasts in batch.
- Schedule forecast reminder notifications.

Understanding Services Forecasting

This section lists prerequisites and provides an overview of:

- Business units in Services Forecasting.
- Forecasting roles and security.
- Forecast configuration options.
- Project forecast options.
- TRCs and task categories.
- Forecast control.
- Forecast prepopulation.

Note. The forecasts in this chapter refer to only the Services Forecasting feature, not the Estimate at Completion forecast.

Prerequisites

Ensure that you have met these prerequisites before you use the Services Forecasting feature:

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- You must implement PeopleSoft Expenses if you want to capture actual time to compare actual utilization to forecast utilization.
- You must implement PeopleSoft Resource Management to prepopulate forecasts with resource schedule information.

Business Units in Services Forecasting

The Services Forecasting feature uses these business units:

- General ledger (GL) business units.

  Forecast frequency, horizon, and horizon periods are defined and generated by the GL business unit.

- Project business units.

  The projects and activities to which a resource can enter forecast or actual time are controlled by project business units.

- Human resource (HR) business units.

  Each resource belongs to an HR business unit. You can analyze resource utilization based on HR business units.

The relationship between GL business units and HR business units is defined in the HR Business Unit record (BUS_UNIT_TBL_HR), which is keyed by the Business Unit field (BUSINESS_UNIT). HR business units that are associated with employees are maintained in the Job record (JOB).

Forecasting Roles and Security

To provide the Services Forecasting feature users with access to application functions that are essential to performing their job tasks, you create roles and assign them to individual user profiles. Inherent in each role is access to the application pages and processes that are required to perform the job tasks. Setting up user access requires that you understand shared data and access to PeopleSoft applications.

This section discusses:

- Permission lists.
- Row-level security.
- Other security features.
- User profiles and roles.

Permission Lists

The Services Forecasting feature comes with preconfigured permission lists that grant access to various pages. These permission lists support the functional roles that are delivered with the application. You can modify the permission lists to grant or revoke access to certain pages, web libraries, components, and other objects as necessary to support an organization's unique roles. To modify the access for a user's role, you modify a permission list that is linked to the role.

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Important! If you modify a permission list, you change the access for all users who are assigned to roles that are assigned to the permission list.

The permission lists that begin with EPEX, EPRS, EPPC, and EPPG are associated with PeopleSoft Expenses, Resource Management, Project Costing, and Program Management, respectively. Because users of these applications are likely to use the Services Forecasting feature, PeopleSoft updated the appropriate existing permission lists to include Services Forecasting pages instead of creating new permission lists.

The following table lists the delivered permission lists that provide access to the Services Forecasting feature, the purpose of each permission list in Services Forecasting, and the roles that are associated with each permission list:

Permission List	*Description*	*Purpose*	*Roles*
EPCO9000	Setup Financials/Supply Chain	Enables administrators to establish business rules for the Services Forecasting feature.	Application Administrator
EPEX1000	Travel and Expense Employee	Provides employees access to enter forecast hours and actual hours.	Employees who log time
EPEX4000	Manager - Time	Provides managers access to approve forecast time and actual time that is entered by an employee.	Expense Manager
EPEX4100	Project Manager - Time	Provides access to approve and modify forecast hours and actual hours against specific projects.	Project Manager, Time Report Project Mgr Appr.
EPEX5000	Travel & Expense Auditor	Enables auditors and administrators to enter, review, update, and submit forecasts on behalf of any employee or manager.	Expenses Auditors, Time and Expense Administrator
EPPC2100	Project/Activity Team	Provides access to update and approve forecast hours for project team members.	Resource Manager, Project Manager, Practice Manager
EPRS5100	RS Worker	Enables resources to enter, review, update, and submit forecasts.	Resource

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Permission List	Description	Purpose	Roles
EPRS5200	RS Worker Manager	Enables managers to enter, review, update, and submit forecasts for their resources.	Resource Manager, Practice Manager

Row-Level Security

PeopleSoft provides row-level security to enable individual users or permission lists to have access to a table without having access to all rows on that table. This type of security is typically applied to tables that hold sensitive data. The Services Forecasting feature uses row-level security in three ways:

- It controls the HR business units that users can access when they are analyzing utilization.
- It limits managers who are using the Review Forecasted Time page to only the GL business units to which they have been granted row-level access.
- It limits the entry of forecast time on the Forecast Time page to only the project business units that the employee is allowed to access.

Note. Row-level security does not restrict the data that is selected by batch processes.

Other Security Features

Other security mechanisms in the Services Forecasting feature include:

- The Review Forecasted Time page, which is used by managers to review employee forecasts, limits managers to the forecasts of their own employees, unless an administrator grants a manager access to another manager's resources using the Authorize Users page.

  The Authorize Users page is also used to grant a time and expense administrator access to a manager's employee forecasts on the Review Forecasted Time page to work on behalf of the manager.

- The Review Forecast by Project page, which is used by project managers to approve hours forecasted against a project, limits project managers to the projects on which they are designated as project manager.

  The designation of an individual as project manager occurs on the Resource Detail page of the Project Resource Plan component (PGM_RESOURCE_LIST). The Authorize Users page is used to grant a time and expense administrator access to a project manager's employee forecasts on the Review Forecast by Project page to work on behalf of the manager.

- The Forecast Time pages that are used for entering and submitting project and personal time can limit the projects and activities to which a user can forecast time (either the employee or the employee's manager) .

  The projects and activities that are available for selection depend on whether a project or activity team is enforced on the project. If no team enforcement is specified for the project, then any employee with access to the project's business unit can access the project. If a project team is enforced, the employee must be on the project team to have access to the project. If an activity team is enforced, the employee must be on the activity team to have access to the project and the specific activity. The level of team enforcement is applied to a project on the Project Costing Definition page of the Project General component.

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User Profiles and Roles

The user must meet these requirements to access pages in the Services Forecasting feature:

- The user must have a PeopleSoft user ID.
- The employee's user ID must be associated with the employee on the Authorize Users page.

  Any user ID can be associated with any employee ID using this page. On the Authorize Users page, you enable users to act on behalf of other users when entering forecasts.
- The user's profile must be assigned at least one role.
- The role must be assigned at least one permission list that authorizes access to the desired Services Forecasting feature pages.

The Services Forecasting feature comes with several preconfigured roles based on functional tasks that are typically performed by an individual assigned to that role. Each preconfigured role comes with access to the set of pages within the application that corresponds to the functional tasks of that role. For example, employees can enter and submit their own forecasts and project managers can modify and approve forecasted hours only for projects for which they are designated as the project manager.

User profiles define individual PeopleSoft users. After you create user roles, create user IDs and link them to roles. The values for a user's page access and authorized actions, such as add, update, or review, are inherited from the associated roles.

This table lists the sample security roles that the Services Forecasting feature provides, the role descriptions, and the permission lists that must be associated with each role to use the full functionality of the Services Forecasting feature:

Role	*Description*	*Purpose*	*Related Services Forecasting Permission Lists*
ADMINISTRATOR	Administrator	Manages system security; specifies installation and business unit options; administers batch processes; grants authorized user access.	ALLPAGES
Application Administrator	Sample - App Administrator	Establishes and maintains business rules for various PeopleSoft Financials and PeopleSoft Supply Chain Management applications.	EPCO9000
Employee	Sample - Employee	Enters own forecast of project hours and personal hours.	EPEX1000

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Role	*Description*	*Purpose*	*Related Services Forecasting Permission Lists*
Expense Manager	Sample - Expense Manager	Ensures the submission of forecast time by employees who are direct reports. Approves actual time, expense, and travel authorizations for these employees.	EPEX4000
Resource	Resource	Enters own forecast of project hours and personal hours.	EPRS5100
Resource Manager or Practice Manager	Resource Manager or Practice Manager	Ensures that resources submit forecasts by deadlines. Manages resource utilization; views and modifies resource schedules and profiles; approves assignments; submits recommendations for resources.	EPPC2100 EPRS5200
Project Manager	Project Manager	Ensures accurate project forecasts and has the authority to modify and approve all hours forecasted for a project.	EPEX4100 EPPC2100
Time and Expense Administrator, EX_AUDITOR	Sample - Time/Expense Admin, Expenses Auditors	Enters, monitors, and approves forecast time and actual time and expense for employees, supervisors, and project managers who either have not complied with the process or need assistance. Ensures that processes of submitting forecast and actual data proceed smoothly.	EPEX5000
EX_TS_PROJMGR	Time Report Project Mgr Appr.	Approves and manages time and expense that are charged to a project against budget targets. Updates and approves forecasts of hours against a project.	EPEX4100

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See Also

PeopleTools PeopleBook: Security Administration

Forecast Configuration Options

Before using the forecast collection tool you must configure certain forecast-related settings. You can establish different forecast configurations for each setID. Consider the following points:

- Forecast frequency determines how frequently you estimate and collect forecasts, such as weekly, biweekly, semimonthly, monthly, or quarterly.

  For users of PeopleSoft Expenses, this table is a guide for setting up the forecast frequency. Schedule the time reporting frequency and forecast collection frequency to coincide, as indicated in this table, so that users can report actual time and forecast time at the same time. Otherwise, users must access the system at different intervals to report actual time and forecast time.

Expenses Time Reporting Frequencies	***Recommended Forecast Frequencies***
Daily	*Weekly*
Weekly	*Weekly, Biweekly*
Biweekly	*Biweekly*
Semimonthly	*Semimonthly, Monthly, Quarterly*

  Expenses time report frequencies are defined in the Expenses Definition component (BUS_UNIT_TBL_EX). Forecast frequencies are defined in the Forecast Configuration component (BUS_UNIT_OPT_FC).

- The forecast horizon defines how many periods are included in each forecast.

  For example, if you have a forecast horizon of *10* and the forecast frequency is in *weeks,* the forecast horizon comprises 10 weeks. The employee must report a detailed forecast for 10 weeks and a single lump number for all remaining planned hours beyond the 10-week period.

- For weekly and biweekly forecasts, the ending day of the period specifies the day of the week on which the horizon period ends so that the system can determine when to begin the next horizon period.

- You specify whether employees can create and submit forecasts for past horizon periods and whether employees can change or submit a pending forecast that was never submitted.

Project Forecast Options

You can establish forecast default settings for all new projects at the project business unit level. You can later override the settings at the individual project level. To set the forecast defaults, you can:

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- Select the forecast level that determines whether you forecast hours at the project or activity level.
- Select a standard rate of employee, job code, or project role to indicate which default rate value to use to forecast costs and revenue.

  For example, you can select the standard rate that is established for the resource's job code as the default value.
- Indicate whether forecasts require project manager approval before forecasts can be used by PeopleSoft Program Management for inclusion in cost and revenue forecasts.

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

TRCs and Task Categories

You can map nonassignment task categories in PeopleSoft Resource Management to the TRCs that are used in the Services Forecasting feature. This mapping enables the forecast prepopulation process to load resource forecasts with appointments from their resource schedules in PeopleSoft Resource Management. The forecast prepopulation process does not include nonassignment time for which no task category to TRC mapping exists, and it does not include project assignment time to which no project has been associated.

Time that is associated with a resource's assignment loads to the forecast without having its task category mapped to a TRC, as long as the assignment is associated with a project.

Forecast Control

The Establish Control Application Engine process (FC_CTRL_LOAD) creates the current forecast iteration for all, one, or specified GL business units. You create a forecast iteration for each business unit according to the rules identified on the Forecast Configuration page and Program Management Options page. You cannot create more than one current forecast iteration for a single GL business unit.

The Establish Control process closes the previous forecast horizon and creates a new forecast horizon beginning with the next available start date. For example, if you configure biweekly forecasts to begin on a Saturday, the Establish Control process creates a two-week forecast horizon that begins on the first Saturday following the end date of the previous forecast horizon.

This process must be completed for each forecast iteration, or you cannot enter a forecast. You can establish forecast control for the next forecast iteration anytime after the start date of the previous forecast horizon and before the start date of the next forecast horizon.

After you establish forecast control for the current forecast iteration, you can prepopulate the forecast for its forecast horizon and update, review, and submit the forecast.

Note. If you need to change the forecast frequency, such as from weekly to biweekly, you must first delete the current forecast data on the Forecast Horizon Control record (FC_CTRL_TBL) and make sure no resources are associated with the current forecast iteration. Then run the Establish Control process.

Forecast Prepopulation

This section discusses:

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- Forecast prepopulation data sources.
- Forecast prepopulation without PeopleSoft Resource Management.
- Forecast prepopulation with PeopleSoft Resource Management.
- Loading company holidays

Forecast Prepopulation Data Sources

The Services Forecasting feature prepopulates a resource forecast from these data sources, if available:

- The prior forecast.
- Resource schedules in PeopleSoft Resource Management.
- Other third-party project management tools.

You can prepopulate forecasts from the prior forecast or resource schedules in PeopleSoft Resource Management using the Populate Time Application Engine process (FC_HRS_LOAD) at the beginning of each iteration for all, one, or selected GL business units for which forecast time is collected. If you select both options, the system loads data from the previous forecast horizon into the current forecast iteration for all horizon periods except for the last one, and it loads project and personal time hours in the last horizon period for resources that are managed by PeopleSoft Resource Management.

If a resource has assignments in the PeopleSoft Resource Management resource schedule that fall within the current forecast horizon, or, if the resource has a forecast in the prior forecast horizon, the batch process creates a forecast for the resource for use in the current iteration of forecast time collection. For resources who either do not submit a forecast or whose last submission did not contain projects, the batch process does not create a forecast.

If you run the Populate Time process at the beginning of the forecast iteration and the forecasts become out of date, you can rerun the batch process to update and override the forecasts later in the forecast time collection iteration for forecasts that are not protected or submitted.

Important! The project end date that is specified in PeopleSoft Program Management does not control the completion date of the project in the Services Forecasting feature. If a resource's project hours load to the forecast beyond the project end date that is specified in PeopleSoft Program Management, the completion date in the forecast is set equal to the last date on which hours load.

Forecast Prepopulation Without PeopleSoft Resource Management

If PeopleSoft Resource Management is not installed, the Populate Time process uses the prior period forecast (if one is available for the resource) to prepopulate the current forecast. A resource's forecast is not prepopulated if no prior period forecast exists for the resource.

The Forecast Time process adheres to these business rules when prepopulating a forecast for resources who are not established as active resources in PeopleSoft Resource Management:

- If a resource's Employee Status field (EMPL_STATUS) on the Job record (JOB) is active on the date that the forecast time collection iteration begins, the resource is eligible for prepopulation.

  If a resource's Employee Status field on the Job record changes to a status other than *Active* during the forecast horizon, the Populate Time process does not load data for days beyond the date of the status change.

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- The Populate Time process loads prior forecast horizon data only from the current forecast horizon begin date forward.
- Depending on the project-level configuration setting, the forecast is prepopulated at the appropriate project or activity level of detail.

  Prior forecast collection data is copied into the current forecast collection down to the daily detail, and hours are distributed at either the project or activity level. It is possible to open the forecast and make no changes at all before submitting it.
- If a resource did not have forecast hours for a project in the most recent prior forecast horizon for a project, the project is not prepopulated in the resource's next forecast.
- When populating the last period of the forecast horizon for which there is no detail available, the prepopulation process uses the number of remaining forecast hours from the prior forecast iteration minus the total number of hours in the prior forecast horizon's last horizon period.
  - *Scenario A:* If the remaining value is greater than zero, that value becomes the remaining forecast hours for the current forecast iteration, and the number of hours that are subtracted from the prior forecast's remaining forecast hours populates the last horizon period of the current forecast.
  - *Scenario B:* If the remaining value equals zero, the number of remaining forecast hours for the current forecast is set to zero, and the number of hours that are subtracted from the prior forecast's remaining forecast hours populates the last horizon period of the current forecast.
  - *Scenario C:* If the remaining value is less than zero, the number of remaining forecast hours for the current period is set to zero and all of the remaining forecast hours that are left from the prior period are distributed over the last horizon period in the current forecast horizon.
- If a resource's most recent prior forecast contains project or personal hours that overlap the current forecast horizon, the overlapping hours from the prior forecast carry forward into the current horizon.

Forecast Prepopulation With PeopleSoft Resource Management

If a forecast for the most recent prior horizon exists for a resource in any status, the Populate Time process loads the current forecast with a combination of data from the prior forecast and the resource schedule in PeopleSoft Resource Management. The prior forecast data loads into the horizon periods that overlap from the last forecast horizon, and the PeopleSoft Resource Management schedule data loads into the newest horizon period.

If a forecast for the most recent prior horizon does not exist for a resource, the entire resource schedule is loaded from PeopleSoft Resource Management for scheduled entries with an end date that is greater than or equal to the forecast beginning date. Historical days of an assignment that occur before the forecast beginning date do not load to the forecast.

If an assignment appeared on a resource schedule during the prior forecast horizon, and the assignment is no longer on the resource schedule in the current forecast horizon, the project that corresponds to the assignment does not automatically load to the current forecast.

The Populate Time process adheres to these additional business rules for PeopleSoft Resource Management resources:

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- If a resource is identified in PeopleSoft Resource Management as eligible for staffing (that is, an active, eligible resource in PeopleSoft Resource Management) at any time between the current forecast horizon begin and end dates, the resource's forecast is prepopulated with a combination of data from the resource's schedule in PeopleSoft Resource Management and the prior forecast.

  If the resource's Employee Status field value on the Job record changes to a status other than *Active* during the forecast horizon, the Populate Time process does not load data for days beyond the date of that status change.

- The process loads prior forecast data such as the project (assignment) time and personal time starting with the current forecast horizon begin date.

- Prior forecast daily detail data is copied into the current forecast and, based on the project-level configuration setting, hours are distributed to either the project or activity level.

  If the data from the prior forecast is still accurate, you might not have to adjust the data that was loaded from the prior forecast before submitting the current forecast.

- The hours for any assignment in the last horizon period that has a project associated with it and exists on the resource's schedule in PeopleSoft Resource Management load into the forecast for the last horizon period.

- The hours that are loaded to the forecast each day are based on the hours that appear for the assignment on the PeopleSoft Resource Management resource schedule.

  Projects that forecast hours at the project level have their time loaded and distributed in the last forecast horizon period. However, for projects in which forecasting is at the activity level, the forecasted project hours from PeopleSoft Resource Management are evenly divided across the activities that are used for forecasting in the prior forecast time collection iteration.

- If a project in a resource's forecast requires activity-level forecasting, the prior forecast data loads to the current forecast at the activity level.

  However, data from the PeopleSoft Resource Management resource schedule loads at the project level, which requires the resource to adjust the prepopulated data across the appropriate activities in the forecast iteration.

- The forecast prepopulates the Project Time grid on the Forecast Time - Summary page with assignments.

  Any tasks on a resource schedule that are in a nonassignment (appointment) task category load to the appropriate TRC row of the Personal Time grid on the Forecast Time - Summary page. TRC hours load into the grid based on the mapping of PeopleSoft Resource Management task categories to TRCs. Each PeopleSoft Resource Management task category can map to zero or one TRC per setID. Resource schedule tasks that are in a task category that is not mapped to a TRC are not prepopulated in the forecast.

- If new assignments are associated with a project that does not already appear in the resource's forecast, the project is automatically added to the forecast for the resource.

- If a PeopleSoft Resource Management assignment has an end date prior to the begin date of the current forecast iteration, the Populate Time process removes the project from the current forecast and does not populate any remaining hours to that project in the current forecast iteration, even if hours remain in the prior forecast.

- Pending assignment extensions in PeopleSoft Resource Management are loaded by the prepopulation process regardless of whether the extension has been approved.

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- When a new PeopleSoft Resource Management assignment prepopulates a forecast, the remaining hours are calculated from the hours that are booked on the resource schedule in PeopleSoft Resource Management.

  A resource can modify the calculated remaining hours on the forecast. In the next forecast iteration, however, the Populate Time process does not refresh the remaining hours again from booked hours in PeopleSoft Resource Management. Instead, the remaining hours are carried forward from the prior forecast. Although the PeopleSoft Resource Management schedule ideally reflects the same information that appears in the forecast, the hours that a resource actually works (or has left to work) may differ. The Populate Time process establishes that the resource is adjusting the estimate of remaining hours in the forecast, and it determines that the forecast is more accurate than the resource's schedule in PeopleSoft Resource Management. Therefore, the prior forecast's remaining hours are used instead of the hours in the PeopleSoft Resource Management resource schedule.

- The Populate Time process removes the project from the current forecast for resources who are managed in PeopleSoft Resource Management (with a current row in the Worker Effective Date record (RS_WRKR_EFFDT) and a value of *No* in the Ineligible Worker field (WRKR_INELIGIBLE)) and who no longer have assignments in the prior forecast that appeared on their resource schedule.

  If the resource had hours that were booked to the project in the prior forecast horizon but the assignment does not appear in the forecast horizon because it is cancelled or completed, the project is removed from the forecast.

Loading Company Holidays

The system uses this logic to load company holidays into a new forecast:

- Company holidays from the prior forecast are copied forward into the new forecast for the overlapping horizon periods.

- The new horizon period that is covered by a forecast obtains company holidays from either the Human Resources (HR) Holiday Date record (HOLIDAY_DATE) or the PeopleSoft Financials Business Calendar record (BUS_CAL_HOLIDAY) that is associated with the resource's GL business unit.

The Populate Time process checks the resource's holiday schedule (HOLIDAY_SCHEDULE) in the Job record, finds the holidays that corresponds to the holiday schedule in the Holiday Date record, and loads company holiday hours to the horizon period. If no holidays for a holiday schedule are found in the Holiday Date record on or after the current date (indicating that the organization did not load company holidays into this HR record), the company holidays are loaded from the PeopleSoft Financials Business Calendar record that is associated with the resource's GL business unit.

Project hours that are allocated with a period that includes a company holiday are distributed to the period evenly on the days that are not company holidays. For example, if a resource normally works a five-day work week and there are 40 project hours to allocate in a week that has only four work days (due to a company holiday), the 40 hours are distributed as four 10-hour days.

Unlike a project, a resource schedule has no specific start and end dates. For this reason, personal time loads only to horizon periods that are included in the current forecast. Personal time does not load to the Remaining Effort field.

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Granting Security Access to Forecasts

For purposes of reviewing, modifying and approving forecasts, you can grant security access to any employee ID to act on behalf of another user ID. This security controls a user's access to the Review Forecasted Time (supervisor review) page and Review Forecast by Project (project manager review) page.

This section discusses how to grant security access to forecasts.

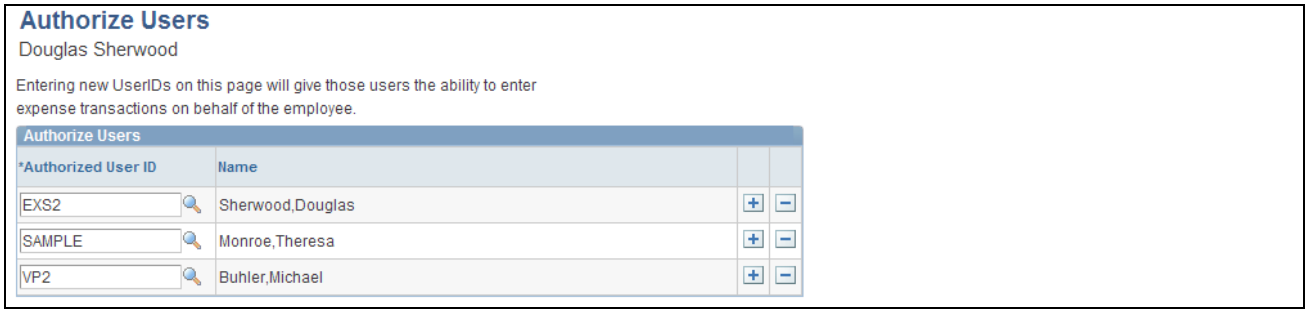
Note. This section is required. You must grant security access before you can use the Services Forecasting feature.

Page Used to Grant Security Access to Forecasts

Page Name	*Definition Name*	*Navigation*	*Usage*
Authorize Users	TE_EE_AUTHORITY	Travel and Expenses, Manage Expenses Security, Authorize Expense Users	Authorize access to employees to the forecast collection pages for themselves and on behalf of other employees.

Authorizing Access to Forecasts

Access the Authorize Users page (Travel and Expenses, Manage Expenses Security, Authorize Expense Users).



Authorize Users page

Access the page with the employee ID or name of the employee whose authority is shared with another user.

Authorized User ID Select a user ID to grant the ability to enter forecasts on behalf of the employee. You can authorize more than one user ID for an employee.

For each employee that is required to submit a forecast, you must authorize the employee's user ID with the employee. This grants employees permission to access their own forecasts.

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By authorizing users on this page to act on behalf of another user, you can give the administrator access to act on behalf of supervisors and project managers. For example, if you authorize an administrator to act on behalf of an employee who is a supervisor of a department of five resources, the administrator can access the forecasts of those five resources on the Review Forecasted Time page. Alternatively, if you authorize the administrator to act on behalf of a project manager, the administrator can access on the Review Forecasts by Project page the projects and project team members for which that project manager is specified as the project manager.

Note. Authorizing a user to act on behalf of another user with a different role does not automatically assign the authorized user to another role. If the users are associated with different roles, make sure that the authorized user has access to the required pages.

Configuring Forecasts

To configure forecasts, use the Forecast Configuration component (BUS_UNIT_OPT_FC).

Before using the forecast collection tool, you must define certain settings at the general ledger (GL) business unit level. These settings are keyed by setID so that they can be shared by multiple business units.

This section discusses how to configure forecasts.

Note. This section is required. You must configure forecast time periods before you can use the Services Forecasting feature.

Page Used to Configure Forecasts

Page Name	*Definition Name*	*Navigation*	*Usage*
Forecast Configuration	BUS_UNIT_OPT_FC	Set up Financials/Supply Chain, Business Unit Related, Program Management, Forecasting, Forecasting Options, Forecast Configuration	Define forecast collection options at the setID level.

Configuring Forecast Time Periods

Access the Forecast Configuration page (Set up Financials/Supply Chain, Business Unit Related, Program Management, Forecasting, Forecasting Options, Forecast Configuration).

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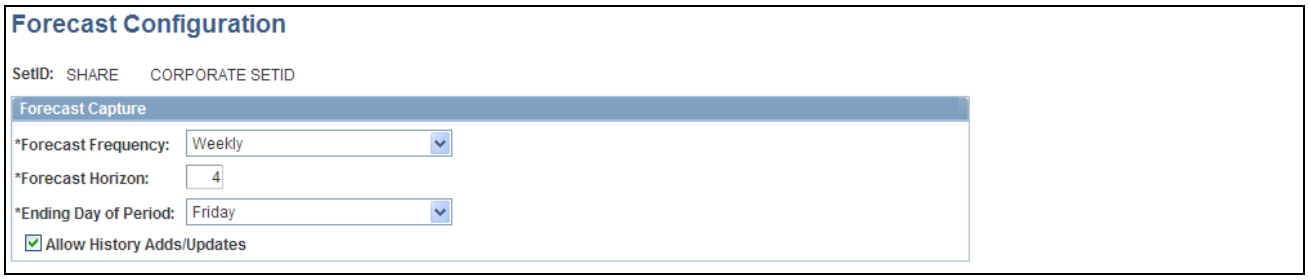

Forecast Configuration page

Forecast Frequency

Select how frequently you want to estimate and collect forecasts. Options are: *Weekly*, *Biweekly*, *Semimonthly*, *Monthly*, and *Quarterly*. The selection determines how frequently forecasts are updated and controls how the horizon periods appear on the Forecast Time - Summary page and Forecast Time - Forecast by Period page.

Forecast Horizon

Enter the number of horizon periods to include in each forecast horizon. This determines the number of periods for which the resource must report a detailed forecast in each forecast time collection iteration.

The maximum number of horizon periods is *13*.

Ending Day of Period

For weekly or biweekly forecast frequencies, specify the day of the week that the horizon period ends so that the system knows when to begin the next horizon period.

This field is required only for weekly or biweekly forecast frequencies and is not used for all other forecast frequencies.

Note. If PeopleSoft Expenses is installed, the Forecast Frequency and Ending Day of Period settings should match the time reporting options in PeopleSoft Expenses. For example, if expense periods end on Saturday, horizon periods should also end on Saturday. This enables users to report actual time and forecast time on the same schedule, which makes it easier to compare and analyze the information.

Allow History Adds/Updates

Select to enable resources or their supervisors to create and submit forecasts for past forecast iterations, and to enable resources to change or submit a pending forecast that was never submitted.

Note. Even if you allow history adds and updates, you cannot modify submitted forecasts from prior forecast iterations. The purpose of history adds and updates is primarily to enable users to submit prior forecasts if they forgot to submit one or want to correct one that is not yet submitted.

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Defining Services Forecast Options

You can specify default settings at the project business unit level for all new projects. These settings can be overridden later at the individual project level.

This section discusses how to:

- Define PeopleSoft Program Management forecast options.
- Override project options at the project level.

Note. This section is optional. If you want to accept the forecast option default values that appear on the Program Management Options page, you do not need to complete the tasks that are discussed in this section. You can continue to the next step in the implementation.

Pages Used to Define PeopleSoft Program Management Forecast Options

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Management Options	PGM_PROG_MGMT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Program Management Options	Specify default values at the project business unit level for automatic forecast approval, forecast level, and standard rate.
Program Management	PROJECT_GEN_02	Program Management, Project Definitions, General Information, Program Management	Override automatic forecast approval, standard rate, and forecast-level default settings that are defined at the project business unit level for an individual project.

Defining Business Unit Forecast Options

Access the Program Management Options page (Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Program Management Options).

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Forecast Capture Group Box

Automatic Forecast Approval Select this option to indicate that the project manager does not have to approve the forecasts to make them accessible to the PeopleSoft Program Management application. Deselect the option to indicate that approval is required on the Review Forecast by Project page before the forecasts can be used.

The default value is *No* (check box deselected).

Note. Forecast data is available for utilization interactive reports and ESA Portal Pack pagelets, with or without approval.

Forecast Level Select *Project* (project) or *Project/Activity* (activity) as the level of forecasting to occur.

The default value is *Project/Activity.*

Warning! If you select *Project*, the activity is not required when you enter a forecast. This affects the organization's ability to report forecasts at the activity level.

Standard Rate Select *Resource* (employee), *Job Code* (job code), or *Role* (project role) to determine how the system looks up the standard rate per hour per resource. This rate is used to calculate costs and revenue.

The default value is *Role.*

Overriding Forecast Options at the Project Level

Access the Program Management page (Program Management, Project Definitions, General Information, Program Management).

On this page you can override for an individual project the Automatic Forecast Approval, Standard Rate, and Forecast Level default settings that are established at the project business unit level on the Program Management Options page.

See Also

Chapter 7, "Managing Programs and Projects," Defining Program and Project Defaults, page 80

Setting Up TRCs and Mapping Task Categories

This section discusses how to:

- Set up TRCs.
- Map TRCs to task categories.

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Note. If you are using PeopleSoft Resource Management with the Services Forecasting feature, you must map the task categories that are used in PeopleSoft Resource Management to the TRCs used in the Services Forecasting feature for personal or policy time that is not associated with projects and activities.

Pages Used to Set Up TRCs and Map Task Categories

Page Name	*Definition Name*	*Navigation*	*Usage*
Time Reporting Code	EX_TRC_EX	Setup Financials/Supply Chain, Product Related, Expenses, Management, Time Reporting Codes, Time Reporting Code	View or create TRCs to classify personal hours.
Task Categories	RS_TASK_TYPE	Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Setup Task Categories, Task Categories	Assign each task category to one TRC per setID.

Setting Up TRCs

Access the Time Reporting Code page (Setup Financials/Supply Chain, Product Related, Expenses, Management, Time Reporting Codes, Time Reporting Code).

Note. You must set up TRCs if you want to forecast personal time. TRCs are not used to forecast project time.

Enter a time reporting code and description. Indicate whether it is used for business holidays.

Important! Select only one TRC to use for business holidays.

See Also

PeopleSoft Expenses 9.1 PeopleBook, "Defining Additional Required Data for PeopleSoft Expenses," Setting Up Time Reporting Codes

Mapping TRCs to Task Categories

Access the Task Categories page (Set Up Financials/Supply Chain, Product Related, Resource Management, Calendar, Setup Task Categories, Task Categories).

Note. This section is optional. If you are not using PeopleSoft Resource Management to prepopulate forecasts, you do not need to complete the tasks that are discussed in this section.

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Use this page to map task categories in PeopleSoft Resource Management to the TRCs that are used in the Services Forecasting feature if you are using PeopleSoft Resource Management to prepopulate forecasts.

Important! You must configure forecast time periods before you map task categories to TRCs.

See Also

PeopleSoft Resource Management 9.1 PeopleBook, "Enabling Resource Schedules," Defining Task Categories and Mapping to TRCs

Establishing Forecast Control

To establish forecast control, use the Run Forecast Control component (RUN_FC_CNTL).

This section discusses how to run the Establish Control Application Engine process (FC_CTRL_LOAD).

Important! This section is required. You must complete the Establish Control process every time that you want to create a current forecast iteration by either running it manually or scheduling it by using the Process Scheduler. Otherwise, you cannot enter a forecast.

Page Used to Establish Forecast Control

Page Name	*Definition Name*	*Navigation*	*Usage*
Establish Control	RUN_CNTL_FC	Program Management, Forecasting, Establish Control, Establish Control	Establish a current forecast iteration for one or more GL business units.

Establishing Forecast Control for Business Units

Access the Establish Control page (Program Management, Forecasting, Establish Control, Establish Control).

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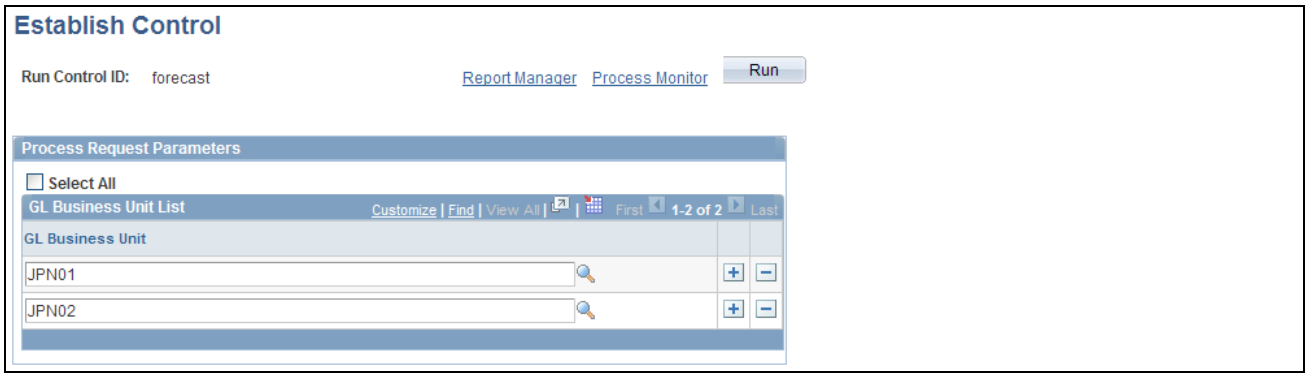

Establish Control page

Use this page to run the Establish Control process to create the current forecast iteration. You can create a recurring instance of this process that runs at an interval that corresponds to your for the frequency, which eliminates the need to run this process manually each time that you want to establish a new forecast iteration. For example, if all business units submit monthly forecasts, schedule the process to run monthly to create a new forecast iteration automatically for all business units each month. You can also group business units by time zone to schedule the process to run at a time of day that is sensible for the majority of users in a region.

Note. Group the Establish Control process with the Administer Cache Application Engine process (FC_CACHE_AD) in the same job and schedule the Administer Cache process to occur immediately following the completion of the Establish Control process.

Select All — Select this option to create forecasts for all GL business units.

GL Business Unit (general ledger business unit) — Alternatively, if you do not select the Select All option above, specify one or more business units for which you want to create forecasts.

Note. If the GL business unit prompt does not return any values, confirm that you have configured the forecast for the setID that is associated with the GL business unit.

Run — Save the run control and click Run for the Establish Control process to create a forecast for each specified business unit according to the rules that are identified on the Forecast Configuration and Program Management Options pages.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

Refreshing the Forecast Cache

To refresh the forecast cache, use the Run Forecast Cache Administration component (RUN_FC_CACHE_AD).

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This section discusses how to run the Administer Cache process to refresh forecast cache tables.

Note. This section is required. You must complete the Administer Cache process, by either running it manually or scheduling it by using the Process Scheduler, every time the Establish Control process completes.

Page Used to Refresh the Forecast Cache

Page Name	*Definition Name*	*Navigation*	*Usage*
Administer Cache	RUN_CNTL_FC	Program Management, Forecasting, Administer Cache, Administer Cache	Refresh forecasting cache tables.

Refreshing Forecast Cache Tables

Access the Administer Cache page (Program Management, Forecasting, Administer Cache, Administer Cache).

The Administer Cache process refreshes cache tables to optimize performance. Cache tables eliminate the amount of logic that the application must perform each time that it needs to identify the resources reporting to a supervisor. The Forecast Supervisor List cache table (FC_SUPR_RVW_LST) stores a list of supervisors and related forecast horizons that have associated employees. The Forecast Supervisor/Employee List cache table (FC_EE_FCST_LST) stores a list of supervisors and their current employees' job information as of the begin date of a specific forecast horizon.

Run the Administer Cache process at least once after every completion of the Establish Control process, and more frequently if supervisor changes occur frequently in the organization.

Prepopulating Forecasts in Batch

To prepopulate forecasts in batch, use these components:

- Run Prepopulate Forecast Time component (RUN_FC_TIME).
- Load Third Party Time component (RUN_PC_PC_TO_FC).

This section discusses how to:

- Prepopulate forecasts using prior forecasts or resource schedules.
- Load other third-party data.

Note. This section is optional. If you are not prepopulating forecasts, you do not need to complete the tasks that are discussed in this section.

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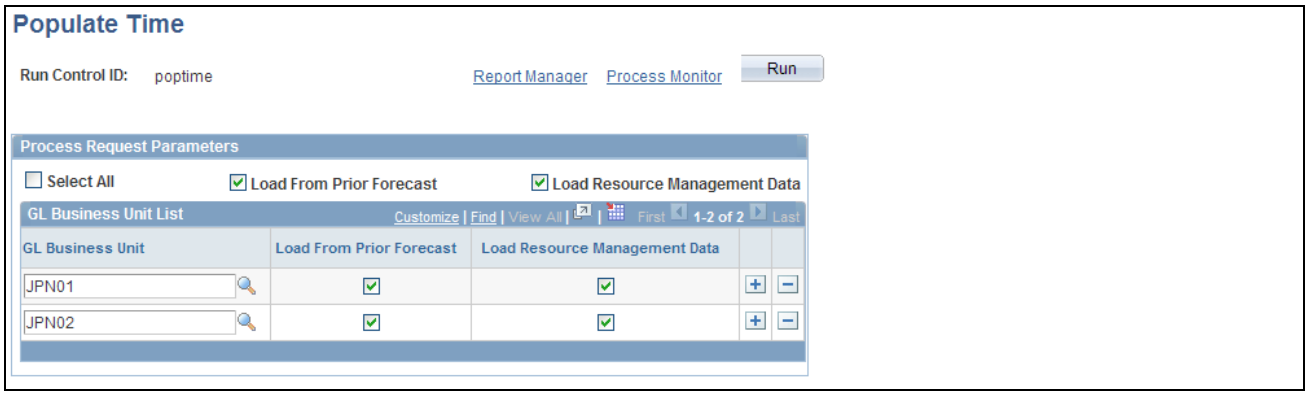
Pages Used to Prepopulate Forecasts in Batch

Page Name	Definition Name	Navigation	Usage
Populate Time	RUN_CNTL_FC	Program Management, Forecasting, Populate Time, Populate Time	Prepopulate forecasts by GL business unit from the prior forecast horizon and from PeopleSoft Resource Management.
Load Third Party Time	RUN_CNTL_FC	Program Management, Forecasting, Load Third Party Time, Load Third Party Time	Load forecast time from a third-party project management tool that is already loaded into the forecast staging table.

Prepopulating Forecasts Using Prior Forecasts or Resource Schedules

Access the Populate Time page (Program Management, Forecasting, Populate Time, Populate Time).



Populate Time page

Select All Select this option to prepopulate forecast hours for all GL business units.

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Load From Prior Forecast and **Load Resource Management Data**

The options are:

- Select only Load From Prior Forecast for the Populate Time Application Engine process (FC_HRS_LOAD) to load data from the previous forecast horizon into the current forecast iteration for all horizon periods except the last one.

  The process calculates the hours for the last period of the forecast horizon as the number of remaining forecast hours from the prior forecast iteration minus the total number of hours in the prior forecast horizon's last horizon period.

- Select only Load Resource Management Data for the Populate Time process to load project and personal time hours in all horizon periods for resources that are managed by PeopleSoft Resource Management.

- Select both options for the process to load data from the previous forecast horizon into the current forecast iteration for all horizon periods except the last one, and load project and personal time hours in the last horizon period for resources that are managed by PeopleSoft Resource Management.

Select both options to take full advantage of the system's ability to prepopulate forecasts using prior forecasts and schedule data from PeopleSoft Resource Management.

GL Business Unit (general ledger business unit)

Specify one or more business units for which you want to prepopulate forecast hours. This field is available if you did not enable the Select All option.

Run

Click Run for the Populate Time Application Engine process to populate the Forecast Time - Summary page, by resource, for the forecast horizon and rules that are defined on the Forecast Configuration and Program Management Options pages.

Important! Run the Populate Time process only after completion of the Establish Control and Administer Cache processes. Schedule all three processes in a single run control in this order: 1. Establish Control, 2. Administer Cache, and 3. Populate Time.

Loading Other Third-Party Data

Access the Load Third Party Time page (Load Third Party Time).

Click Run for the Load Third-Party Data Application Engine process (PC_PC_TO_FC) to load data from a third-party project management tool after that data is loaded into the forecast staging table.

Scheduling Forecast Reminder Notifications

To schedule forecast reminder notifications, use the Run Forecast Reminder component (RUN_FC_REMINDER).

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In the Services Forecasting feature, you can identify employees who have not submitted the required forecasts and send them email reminders.

This section discusses how to schedule forecast reminder notifications.

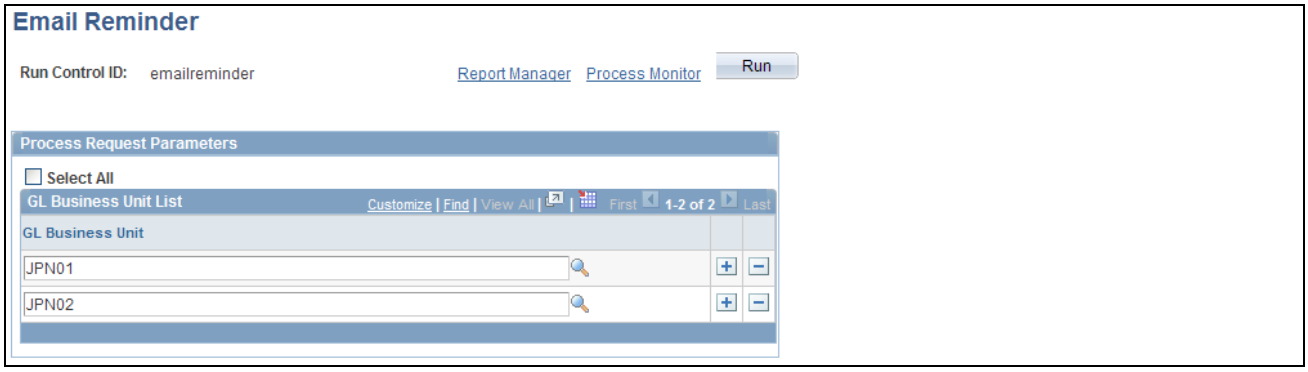
Note. This section is optional. If you are not using forecast reminder options, you do not need to complete the tasks that are discussed in this section.

Page Used to Schedule Forecast Reminder Notifications

Page Name	*Definition Name*	*Navigation*	*Usage*
Email Reminder	RUN_CNTL_FC	Program Management, Forecasting, Email Reminder, Email Reminder	Send email reminders to resources who have not submitted a required forecast.

Sending Forecast Reminders by Email

Access the Email Reminder page (Program Management, Forecasting, Email Reminder, Email Reminder).



Email Reminder page

On this page, you can schedule the Email Reminder Application Engine process (FC_REMINDER) to send an email reminder to each resource in the specified GL business units who has not submitted a forecast for the current forecast iteration as of the current Run Date and Run Time on the Process Scheduler Request page.

Select all GL business units or specify them individually. Click Run to initiate or schedule the process by using the PeopleSoft Process Scheduler.

Note. The Review Forecasted Time page also includes an ad hoc email notification feature so that a reviewing manager can send a reminder or a note to the manager's own resources.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

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Chapter 7

Managing Programs and Projects

This chapter provides an overview of programs, projects, the enterprise program tree, program managers, and resource pool security, and discusses how to:

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

See Also

Chapter 8, "Establishing Project Requests," page 93

Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22

PeopleSoft Project Costing 9.1 PeopleBook, "Creating and Maintaining Projects"

PeopleSoft Project Costing 9.1 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 a theme is associated with a program, and all the projects that are 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 check box to indicate that 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 that is undertaken to create a unique product, service, or result. Projects can be created by using one of these methods:

- Automatically by the system when you approve a submitted project request.

  You create project requests in either PeopleSoft Project Portfolio Management or PeopleSoft Program Management.

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- Automatically by the system when you change a submitted project request to a status of costing.

  When you set project requests that you created in either PeopleSoft Project Portfolio Management or PeopleSoft Program Management 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.

  You create projects by 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 the project template feature, which creates a project from an existing template.

  The create project from a template 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 PeopleSoft Proposal Management

  In PeopleSoft Proposal Management, the Contract Generation process creates projects and activities based on information that is contained in a proposal.

- By importing project data from Microsoft Project.

  You import projects from Microsoft Project by 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 that are 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 project health and program data.

Understanding Program Managers

Typically, program managers create and manage programs, create program budgets, and assign project managers. You define program managers on the Project General - Manager page for programs. You can have more than one program manager for a program, but the effective dates for the program managers cannot overlap. If you change a project into a program, the system retains the project manager as the program manager. If you change a program into a project, the system automatically adds the program manager to the resource list as a project manager. If the program has multiple program managers, the system will add each program manager to the resource list as project managers based on their effective dates.

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Understanding Resource Pool Security

The PeopleSoft Project Costing application allows you to designate who can charge time and expenses to a project or activity by selecting an option in the Enforce Team group box on the Project Costing Options page for the business unit or the Project Costing Definition page for the project. PeopleSoft Program Management provides two additional options that enable resource pool security:

- Project Resource Pools Only: Indicates that only resources that belong to the project's resource pools can charge time and expense in PeopleSoft Expenses against the project.
- Project Activity Resource Pool: Indicates that only resources that belong to the activity's resource pools can charge time and expense in PeopleSoft Expenses against the activity.

Project Managers use the Project Resource Pools page and Activity Resource Pools page to select the resource pools for each project and activity. You must run the Refresh Resource Pools Application Engine process (PGM_POOL_RFS) for the system to recognize the pools to use in the PeopleSoft Expenses system. The prompts for activity on the Expenses Time Entry page and the Expense Report page are only as accurate as the last time the Refresh Resource Pools Application Engine ran if either the Project Resource Pool Only or Project Activity Resource Pool option is selected for the project.

Note. These options appear only if PeopleSoft Resource Management is installed and are applicable to charge time and expense data only in the PeopleSoft Expenses application and not the Time and Labor application.

Establishing and Maintaining Programs and Projects

This section discusses how to:

- Establish programs and projects.
- Define project security options.
- Define program and project defaults.
- Define activity options.

Page Used to Establish and Maintain Programs and Projects

Page Name	*Definition Name*	*Navigation*	*Usage*
General Information	PROJECT_GEN_01A	Program Management, Project Definitions, General Information, General Information	Establish and maintain programs and projects.

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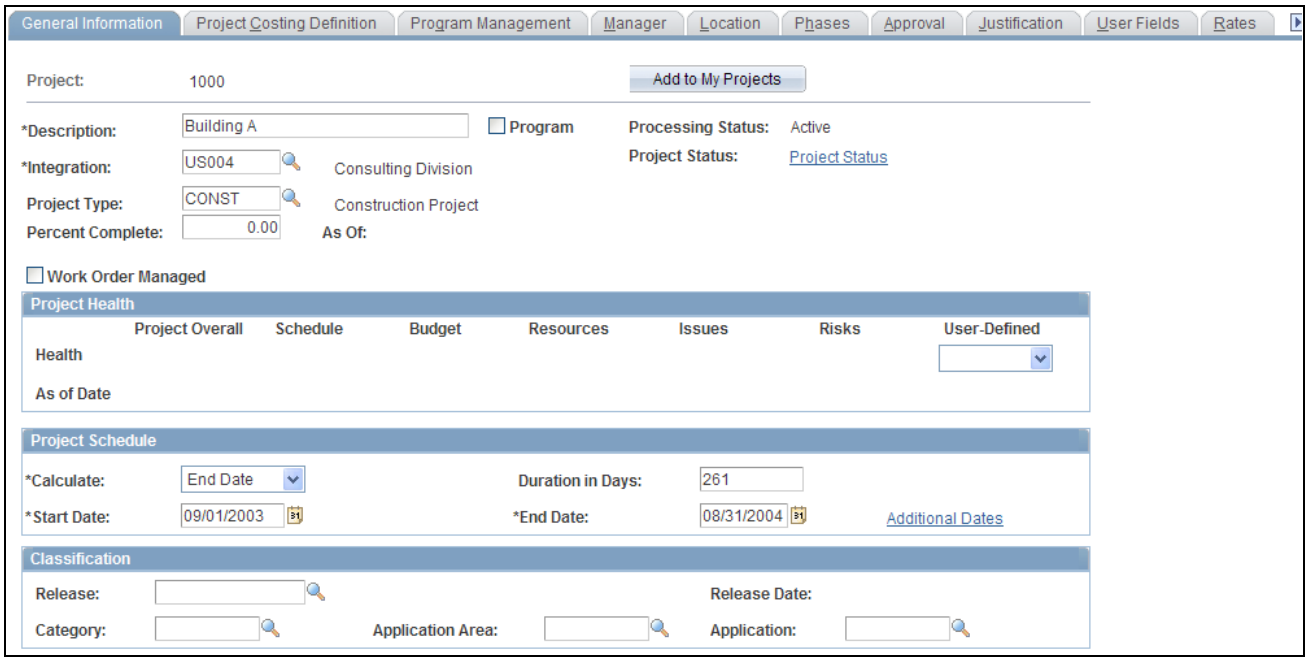
Page Name	*Definition Name*	*Navigation*	*Usage*
Project Costing Definition	PROJECT_GEN_01	Program Management, Project Definitions, General Information, Project Costing Definition	Define various project options including how to enforce team security.
Program Management	PROJECT_GEN_02	Program Management, Project Definitions, General Information, Program Management	Set up defaults for scheduling, health criteria, and forecasting for a program.
Definition	PROJECT_ACTIVITY	Program Management, Activity Definitions, General Information, Definition	Establish change control and scheduling for activities.

Establishing Programs and Projects

Access the General Information page (Program Management, Project Definitions, General Information, General Information).



General Information page (1 of 2)

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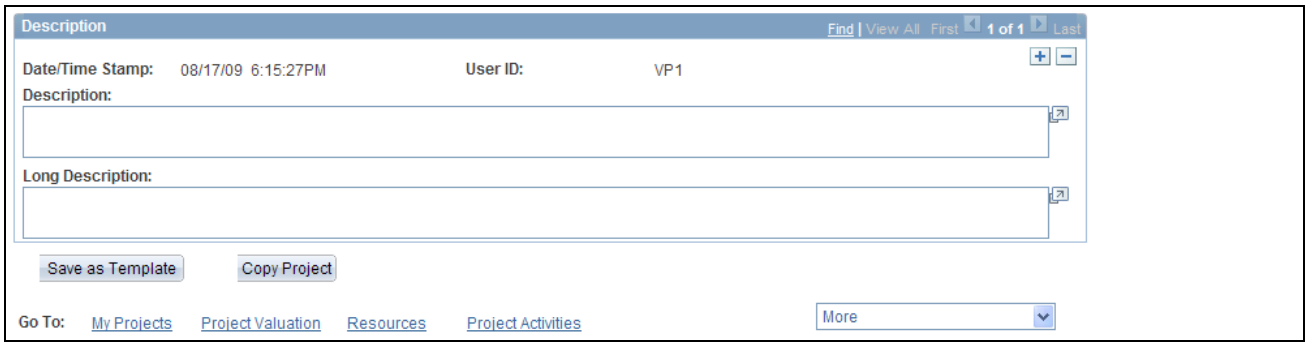

General Information page (2 of 2)

The following fields are available only when you have PeopleSoft Program Management installed. The remaining fields that are on this page are described in the PeopleSoft Project Costing PeopleBook.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Creating and Maintaining Projects," Entering Project General Information.

Calculate Select one of the following three elements for the system to calculate based upon the values that you enter for the other two fields that are on the page: Start Date, End Date, or Duration in Days.

Duration in Days Enter the number of business days that are between the start date and end date of the project.

Release Select the release for this project. This field is available only on project definitions because programs can span many releases.

See Chapter 15, "Managing Project Releases," page 269.

Release Date Displays the current target release date associated with the release that you select.

Category Select the category to further classify the program or project.

Application Area Select the application area to further classify the program or project.

Application Select the application to further classify the program or project.

See Also

Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Setting Up General Control Data, page 32

Defining Project Security Options

Access the Project Costing Definition page (Program Management, Project Definitions, General Information, Project Costing Definition).

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Enforce Team

Designate who can charge time and expenses to a project or activity by selecting an option in the Enforce Team group box. These options are available for selection at the project level if you selected the Decide at the Project Level option on the Project Costing Options page for the business unit. The Project Resource Pools Only and Project Activity Resource Pools options appear only if you have PeopleSoft Resource Management installed. The remaining options that are on this page are described in the PeopleSoft Project Costing PeopleBook.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up Project Business Units," Defining Project Business Units.

Project Resource Pools Only

Select to indicate that only resources that belong to the project's resource pools can charge time and expense in the PeopleSoft Expenses application against the project.

Project Managers use the Project Resource Pools page to specify the project resource pools.

See Chapter 7, "Managing Programs and Projects," Establishing Resource Pool Security, page 88.

Project Activity Resource Pool

Select to indicate that only resources that belong to the activity's resource pools can charge time and expense in the PeopleSoft Expenses application against the activity.

Project managers use the Activity Resource Pools page to specify the activity resource pools.

You can select this option only if the project charging level is set to All Detail Activities on the Program Management page.

See Chapter 7, "Managing Programs and Projects," Establishing Resource Pool Security, page 88.

Defining Program and Project Defaults

Access the Project General - Program Management page (Program Management, Project Definitions, General Information, Program Management).

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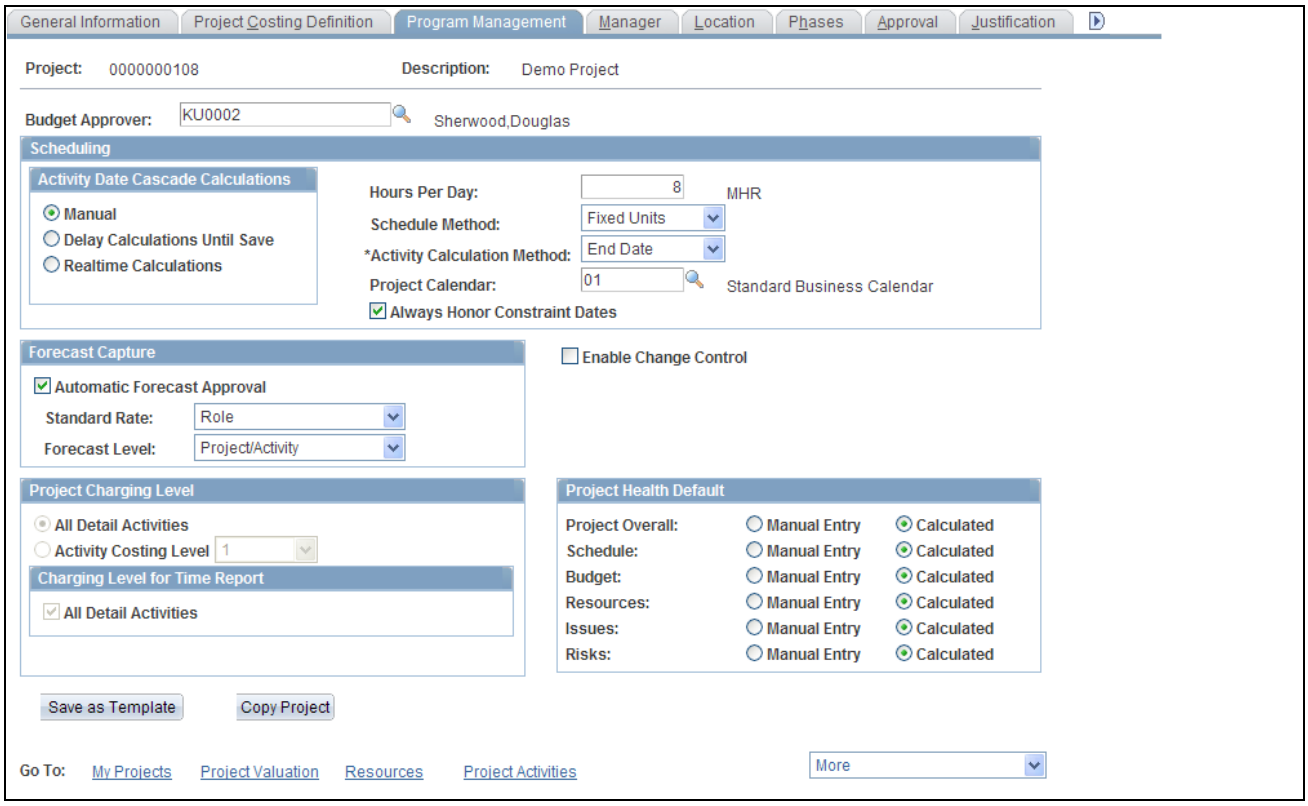

Project General - Program Management page

Use this page to configure how a specific project or program functions with respect to scheduling, forecasting, managing change control, the project charging level, and evaluating project health. The values that you enter on this page override the program management option settings for the fields that are established at the business unit level. The only fields that are documented here are those that do not perform identically to the corresponding fields that you define for the business unit.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Establishing PeopleSoft Program Management Business Unit Options, page 22.

Budget Approver Enter the employee ID of the user responsible for approving budgets for this project.

Always Honor Constraint Dates Select to enable the system to strictly enforce the constraints that you set at the activity level.

Deselect this option to allow users to keep constraints that you define on an activity but set dates that might not specifically follow the constraints.

See Chapter 9, "Using Schedule Dependencies and Constraints," page 121.

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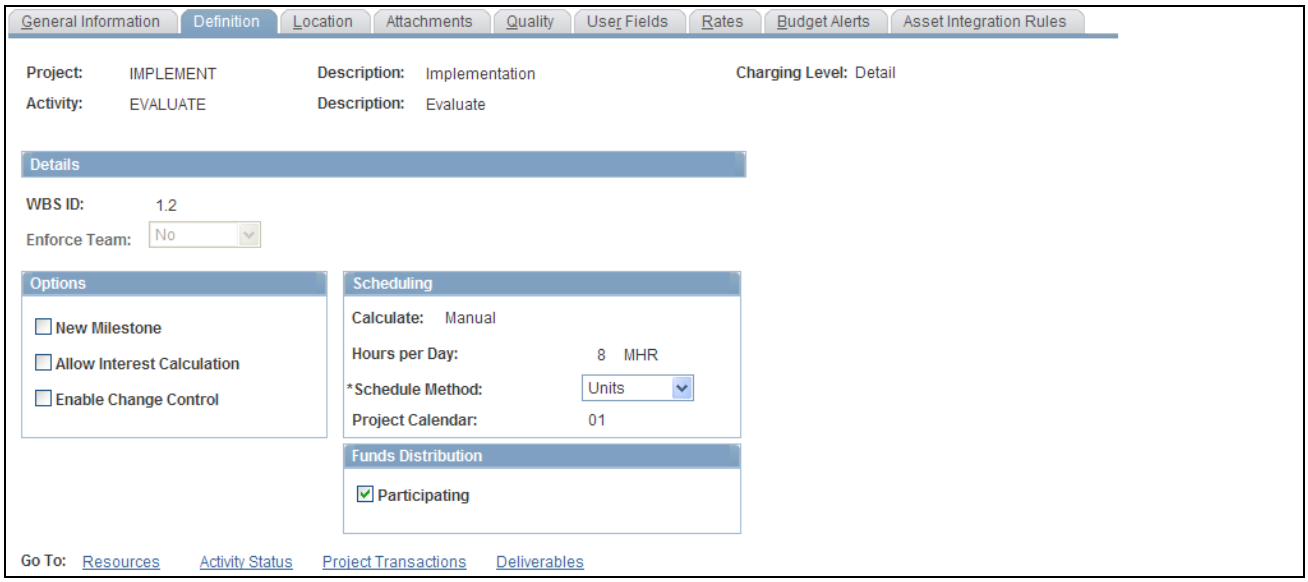
Enable Change Control Select to enable change control functionality for this project.

Note. You must designate a budget approver if you select *Change Request Required* for the Finalize Budget Plan option on the Change Control Template page for the change control template that you enter.

You must establish a project manager if you select *Change Request Required* for the Estimate To Complete option on the Change Control Template page for the change control template that you enter.

Defining Activity Options

Access the Activity Definitions - Definition page (Program Management, Activity Definitions, General Information, Definition).



Activity Definitions - Definition page

Use this page to override business unit default settings at the activity level on individual projects. The following fields are available only when you have PeopleSoft Program Management installed. The remaining fields that are on this page are described in the PeopleSoft Project Costing PeopleBook.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," page 17.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Creating and Maintaining Activities," Entering Activity General Information.

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Options

Enable Change Control Select to enable change control functionality for this activity. If change control is not enabled at the project level, this activity uses the change control template that is defined for the business unit. If you enable change control at the project level, you do not need to enable change control at the activity level, because the activities that belong to a project use the change control template that is defined for that project.

Scheduling

Calculate Displays the calculation method that determines when the system rolls up start and end dates for activities. You specify this value on the Project General - Program Management page.

Hours per Day Displays the number of hours per day that define a work day for this activity. The system uses this time value to calculate the amount of time that a resource is available for the schedule. You specify this value on the Project General - Program Management page.

Schedule Method Select the method for calculating schedules for this activity. The scheduling method determines what element of a project schedule remains constant when one of the three scheduling variables (work, duration, or units) changes. You can override the default value that the system supplies from the Project General - Program Management page.

Project Calendar Displays the project calendar that is used for calculating schedules for this activity The system uses this calendar to determine business holidays and nonwork days and factor them into the calculation of start dates, end dates, and durations. You specify this value on the Project General - Program Management page.

Establishing and Maintaining Enterprise Program Trees

This section discusses how to:

- Establish enterprise program trees.
- Maintain enterprise program trees.
- View the enterprise program tree.

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Pages Used to Establish and Maintain Enterprise Program Trees

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Management Options	PGM_PROG_MGMT_OPT	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Program Management 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, Enterprise Program Tree	Assign a project or program to the enterprise program tree that is 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 Enterprise Program Trees

Access the Program Management Options page (Set Up Financials/Supply Chain, Business Unit Related, Program Management, Business Unit Options, Program Management Options) 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 creates a tree that is 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 the enterprise program trees.

Tree Definition Requirements

The key field values that the system requires on the Tree Definition page for enterprise program trees are:

Status *Active.*

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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.

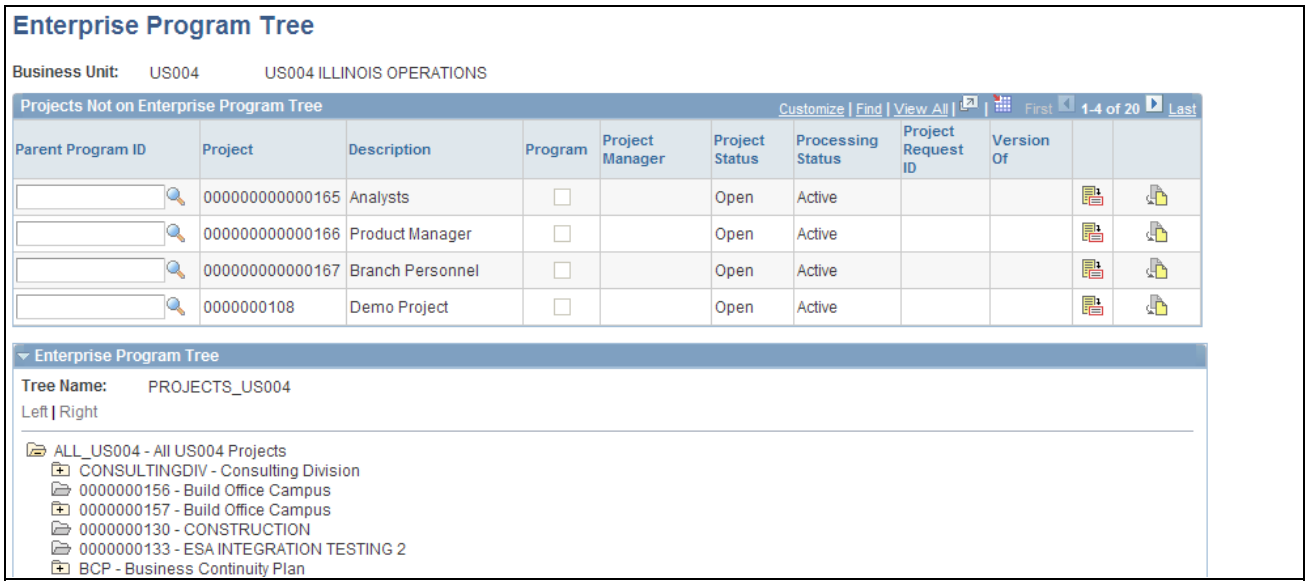
Performance Methods Accept the defaults for all options.

See Also

Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Establishing PeopleSoft Program Management Business Unit Options, page 22

Maintaining Enterprise Program Trees

Access the Enterprise Program Tree page (Program Management, Program Tools, Enterprise Program Tree, Enterprise Program Tree).



Enterprise Program Tree page

Parent Program ID Enter the program ID for the projects and programs that are listed in the Projects Not on Enterprise Program Tree grid for which you want this program to be the parent. You must save in order for the system to add the program or project to the enterprise program tree.

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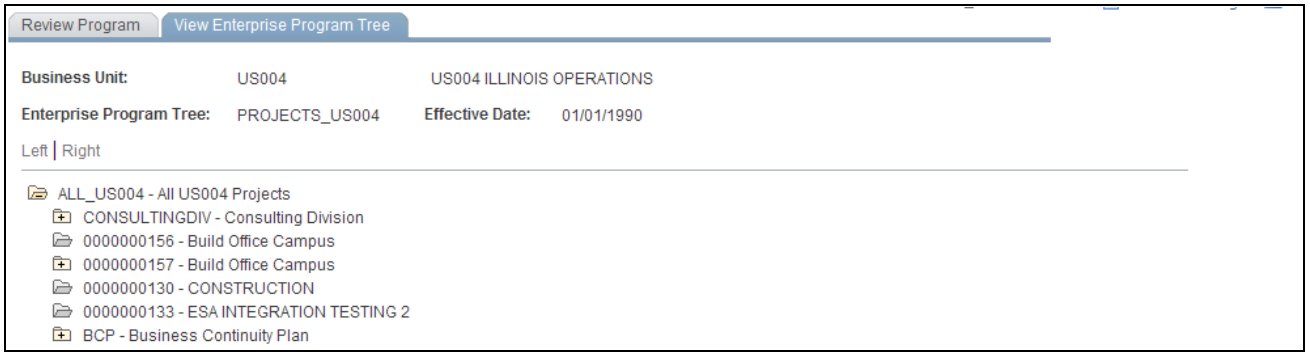
	Click to access the project General Information component (PROJECT_GENERAL) and view or update details about the project or program.
	Click to access the Project Request component (BC_PROJ_REQUEST). This option is valid only if the project or program is linked to a project request.
Tree Manager	Click to access the Tree Manager page, on which you can edit the tree.

Viewing the Enterprise Program Tree

Access the View Enterprise Program Tree page (Program Management, Program Tools, Review Program, View Enterprise Program Tree).



View Enterprise Program Tree page

This page is a display-only view of the enterprise program tree that is 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 to access the Tree Manager page, on which you can edit the tree.

Refreshing Program Data

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

Understanding the Program Refresh Process

The Program Refresh Application Engine process (PGM_PROGRFSH) summarizes project data into program data and recalculates:

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- Project health.

  This applies to programs and projects with a health criteria method of calculate. When you run this process, the health as of date is updated with the date and time of processing.

- Start and end dates.

  The system updates program dates only; project dates are updated in real time when activity dates are updated. The system updates the program's start and end dates based on the earliest start date and latest end date of its child projects.

You should run the program refresh process as often as you need current program or project health status. For example, if the project manager reports the status weekly on Fridays, you should run the process on Thursday nights.

Page Used to Refresh Programs

Page Name	*Definition 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 (Program Management, Program Tools, Program Refresh).

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

Business Unit
Specify the business unit for which to run this process.

Project
Specify the project for which to run this process. This field is required when the BU/Proj Option field is set to *Business Unit/Project.*

Select from Enterprise Program Tree
Click to view the enterprise program tree that is associated with the business unit, and select the specific program or project to refresh.

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Calculate Health Select to recalculate project health. The system calculates the result based on health parameters that you enter at the business unit level for all selected projects with a health method of *Calculate.*

Note. To use this option, you must ensure that health parameters are already set up for the selected business unit; otherwise, the system displays an error message 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.

Important! Programs and projects must reside on the enterprise program tree for the Program Refresh process to calculate the program or project health.

Establishing Resource Pool Security

This section discusses how to select project resource pools and activity resource pools.

Pages Used to Establish Resource Pool Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Resource Pools	PGM_PRJ_RES_POOL	Program Management, Project Definitions, Project Resource Pools, Project Resource Pools	Select pools to include on the resource pools list to enforce resource pool security.
Search Resource Pools	PGM_POOL_SRCH	• Program Management, Project Definitions, Project Resource Pools, Project Resource Pools Click the Add Pools button. • Program Management, Project Definitions, Project Resource Pools, Activity Resource Pools Click the Add Pools button.	Search and select resource pools to add to the resource pools list to enforce resource pool security.
Activity Resource Pools	PGM_ACT_RES_POOL	Program Management, Project Definitions, Project Resource Pools, Activity Resource Pools	Select pools to include on the activity resource pools list to enforce resource pool security.

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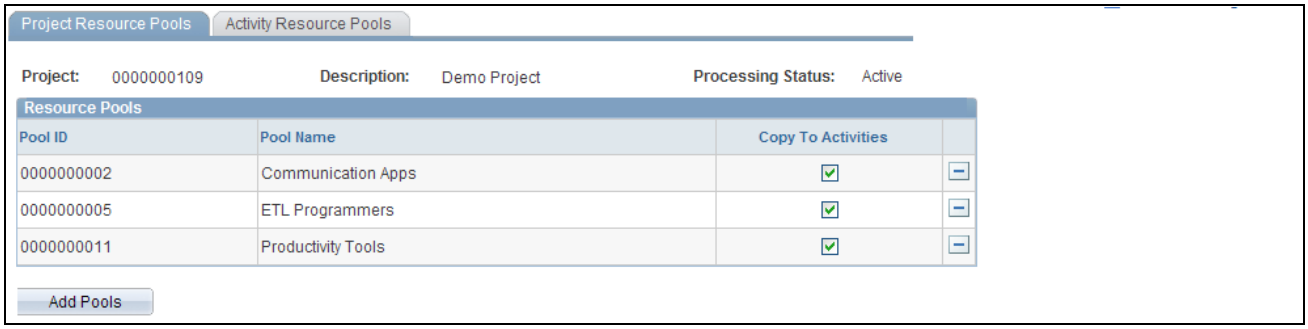
Page Name	Definition Name	Navigation	Usage
Copy From Project Pools	PGM_CPY_PRJ_POOL	Program Management, Project Definitions, Project Resource Pools, Activity Resource Pools Click the Copy From Project Pools button.	Search and select resource pools from the project resource pools to add to the activity resource pools list to enforce resource pool security

Selecting Project Resource Pools

Access the Project Resource Pools page (Program Management, Project Definitions, Project Resource Pools, Project Resource Pools).



Project Resource Pools page

TheResource Pools group box lists all of the resource pools selected from the Search Resource Pools page.

Copy to Activities Select to indicate which resource pools to copy to the resource pools on the Activity Resource Pools page. The system copies the selected resource pools to each activity in the project when you save the page.

Add Pools Click to access the Search Resource Pools page on which you can search, select, and add resource pools to the Resource Pools group box. You can search by manager ID , pool ID, or pool name.

Project Resources Click to access the Resources page.

Selecting Activity Resource Pools

Access the Activity Resource Pools page (Program Management, Project Definitions, Project Resource Pools, Activity Resource Pools).

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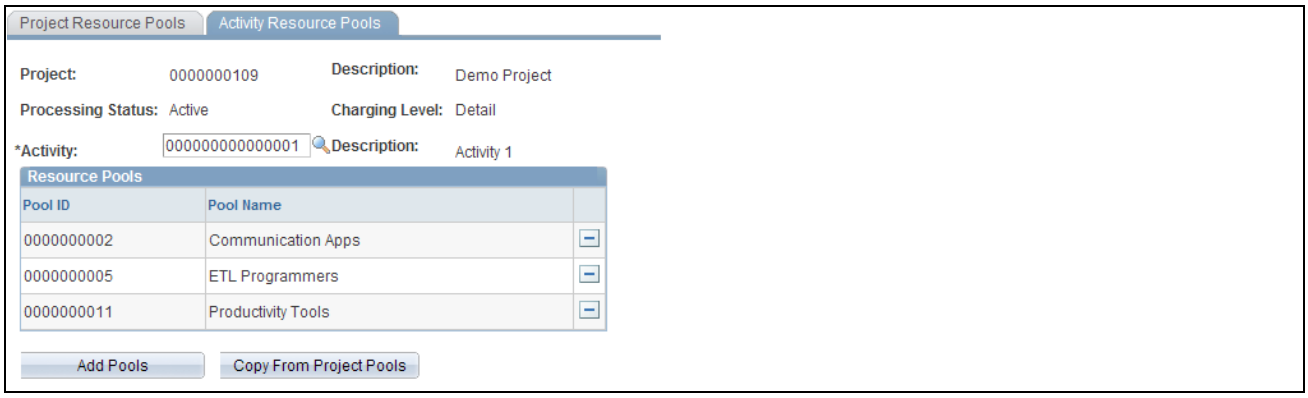

Activity Resource Pools page

The system lists all of the resource pools that the project manager has selected to use with the selected activity in the Resource Pools group box.

Activity Select the activity for which to display the current resource pools selected for that activity.

Copy from Project Pools Click to access the Copy From Project Pools page on which you can select resource pools from pools that are on the Project Resource Pools page to copy to this page.

You must save the resource pools on the Project Resource Pools page before you can copy project resource pools to activity resource pools.

Activity Resources Click to access the Resources by Activity page.

Refreshing Resource Pool Security

This section provides an overview of the refresh resource pool security process and discusses how to refresh resource pool security.

Understanding the Refresh Resource Pool Security Process

The Refresh Resource Pools Application Engine process (PGM_POOL_RFS) populates the Resource Pool Cache table (PGM_POOL_CACH) with the data of employees who are eligible for charging by project and activity based on resource pools and the method by which you enforce resource pool security. This helps performance when the user goes to the PeopleSoft Expenses page to enter time and expenses. The prompt for activity on the PeopleSoft Expenses Time Entry and Expense Report pages is only as accurate as of the last time the Refresh Resource Pools Application Engine process ran if either the Project Resource Pool Only or Project Activity Resource Pool option is selected for the project.

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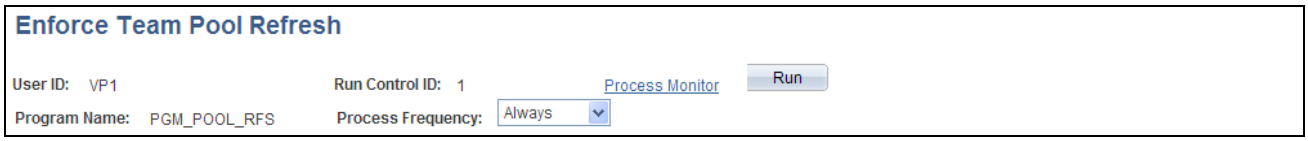
Page Used to Refresh Resource Pool Security

Page Name	*Definition Name*	*Navigation*	*Usage*
Enforce Team Pool Refresh	RUN_PGM_POOL_RFSH	Program Management, Program Tools, Enforce Team Pool Refresh, Enforce Team Pool Refresh	Run the Refresh Resource Pools Application Engine process.

Refreshing Resource Pool Security

Access to Enforce Team Pool Refresh page (Program Management, Program Tools, Enforce Team Pool Refresh, Enforce Team Pool Refresh).



Enforce Team Pool Refresh page

Select the process frequency and click Run to send this process to the Process Scheduler.

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Chapter 8

Establishing Project Requests

This chapter provides an overview of project requests, and discusses how to:

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

Understanding Project Requests

This section lists prerequisites and discusses:

- Project request versions.
- Project request approval workflow.
- Revise project request cost estimates process.

Project requests 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, decide which projects to undertake.

Prerequisites

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

If PeopleSoft Project Portfolio Management is installed:

- You must set up all available general ledger business units in both PeopleSoft Project Portfolio Management and in PeopleSoft Project Costing, using integration templates.
- You must set up tableset sharing so that all ChartFields are valid in both PeopleSoft Project Costing and PeopleSoft Project Costing.
- The project portfolio management business unit must be the same as the project business unit.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," page 17.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," page 31.

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Project Request Versions

You can create multiple versions of a project request 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 remaining versions change to declined status. (Versions that are already declined remain in declined status.) When a version is created, the system populates many of its fields by default with the values of the current project request.

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 who is 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.

These are the steps that take place during the workflow procedure for project request approvals:

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

   Based on the initiative type that the user enters on the project request, the project owner and approver fields populate automatically on the project request. The system initially sets 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.

   The project approval page appears.

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5. The approver selects one of these options:

Approve

Approves (or operationally approves) the project request.

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

- If funding department manager approval is required:

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

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

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

- If funding department manager approval is not required:

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

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

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Program Management Installation Options.

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Return	Returns the project request to the individual who is 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 value signifies that the project manager must create a detailed plan by using the various project planning tools that are in PeopleSoft Program Management. When the plan is complete, the project manager clicks the Send to Project Request button that is 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 is 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:

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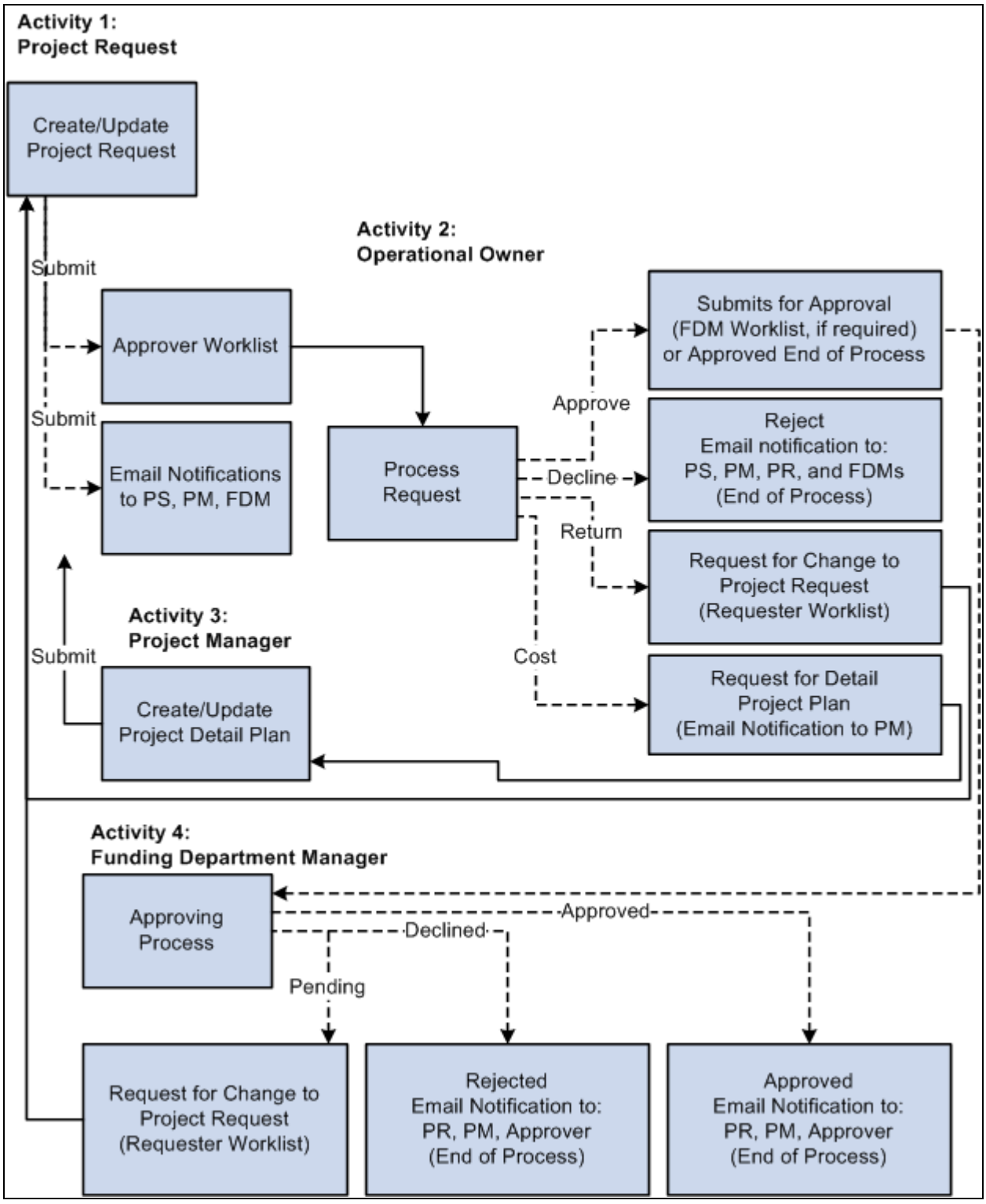

Project request approval workflow

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

PS	Project sponsor

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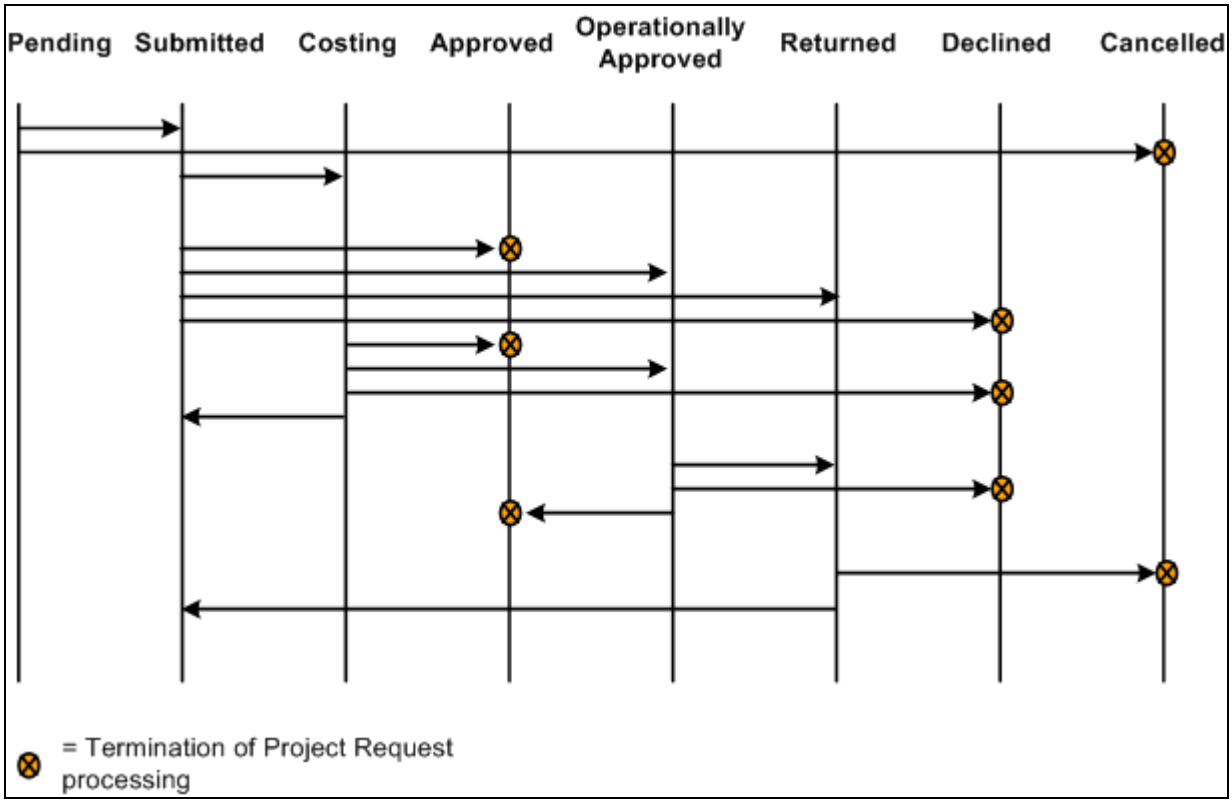
PM	Project manager
PR	Project requester
FDM	Funding department manager

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



Project request status values

Note. Project request functionality is also provided by PeopleSoft Project Portfolio Management, which is part of the PeopleSoft Performance Measurement (PM) 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 that are in PeopleSoft Project Portfolio Management.

Note. Administrators must specify default project statuses for each processing status for projects that are programmatically created by PeopleSoft Project Portfolio Management or PeopleSoft Program Management project requests in an approved status. Otherwise, the approval process for project requests will fail.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up PeopleSoft Project Costing Control Data," Project and Processing Statuses.

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See Also

Appendix B, "Delivered Workflows for PeopleSoft Program Management," page 483

Revise Project Request Cost Estimates Process

When you set a project request to a status of costing, the system creates a project in pending status and optionally generates a worklist entry for the project manager on the project request. The project manager creates a program or project cost budget plan with detailed cost estimates.

After the detailed cost estimate is complete, the project manager needs to transmit the completed estimate to the project request.

Use the Project Request Estimate Summary page to update project requests with revised cost estimates. You initiate the Send Estimate to Project Request Application Engine process (PGM_ES_TO_PR) when you click the Send Costs to Project Request button. This process:

1. Summarizes all cost budget detail row amounts by general ledger business unit, department, account, and budget period.
2. Converts the budget calendar periods to the corresponding accounting calendar periods that are defined on the project request.

   The system does this by determining the accounting period in which the last date of each budget period occurs. The budget periods are then replaced with accounting periods.
3. Sends the project or program budget to the project request.
   - If the project request is associated with a program and a program budget is available, the system uses the program budget as the basis for sending estimates to the project request.
   - If there is no active program budget, the system uses the child project budget(s) as the basis for sending estimates to the project request.

You must populate the fields for general ledger business unit, department, and account for the budget rows that the system uses for sending estimates to the project request. If these fields are not populated, you receive an error message and the process stops. While all ChartFields are available on the budget detail line, this process writes only general ledger business unit, department, and account ChartFields to the project request.

If you are creating a detailed cost estimate for a program that has subordinate projects, you must add the program to the enterprise program tree and then add the subordinate projects to the tree. If you do not establish this relationship in the enterprise program tree, the Project Request Estimate Summary page cannot determine which projects to include when compiling costs for the consolidated estimate.

Creating Project Requests

This section discusses how to:

- Establish project requests.
- Associate attachments with project requests.

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- 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.
- Enter additional project request fields.

Pages Used to Create Project Requests

Page Name	*Definition 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.

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Page Name	Definition Name	Navigation	Usage
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 statuses.
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.
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.
Additional Fields	BC_PROJ_REQUEST2	Program Management, Project Request, Project Request, Additional Fields	Enter additional user-defined information about a project request
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 (Program Management, Project Request, Project Request).

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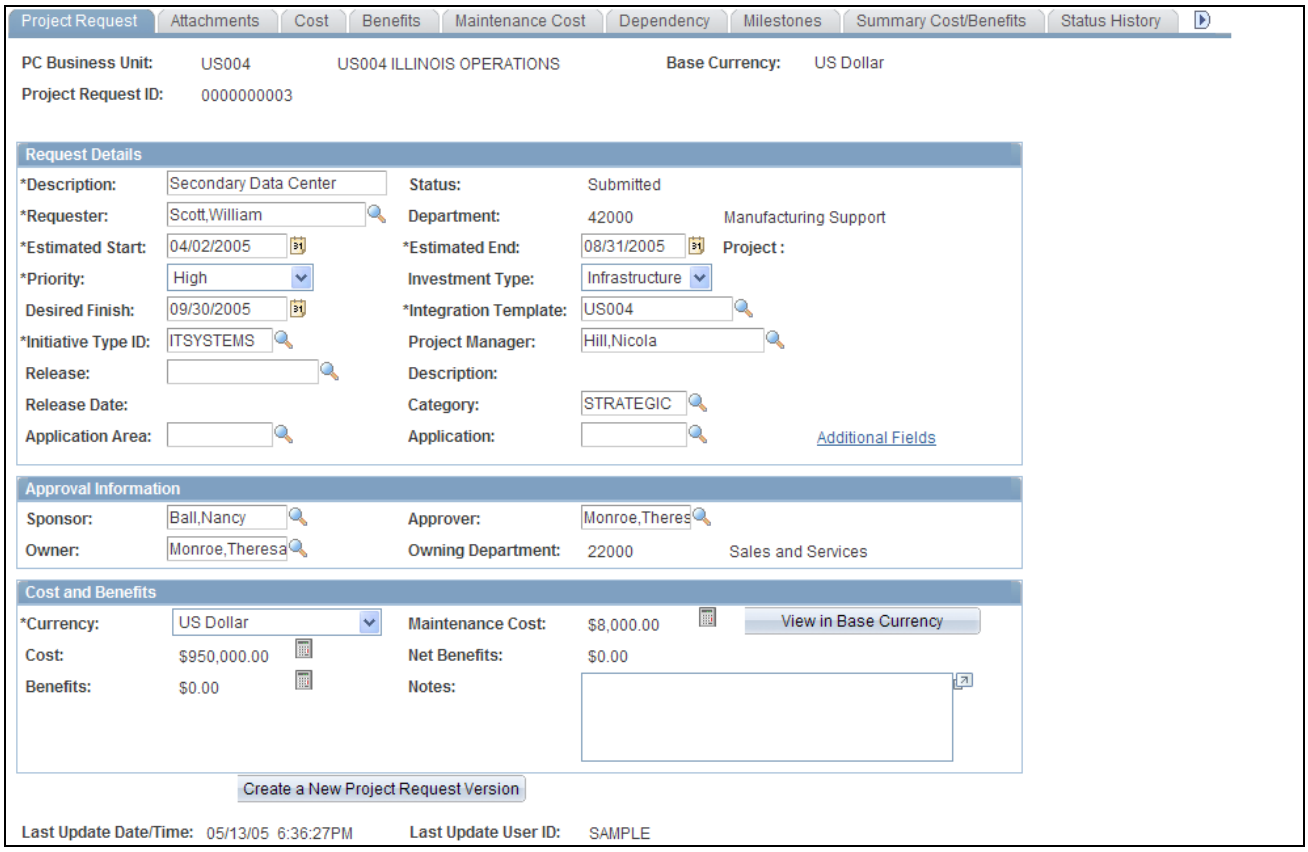

Project Request page

Request Details

Requester — Enter the name of the individual who is creating the project request or the person on whose behalf it is created.

Estimated Start, Estimated End, and **Desired Finish** — Enter the corresponding project dates. The system uses the estimated start and estimated end dates 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.

Priority — Select the project request's priority. You can select from five delivered priority levels. You can modify the description of the priority labels.

Priority labels are maintained on the Priority Description page.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Project Request Priorities, page 47.

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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. See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Initiative Types, page 46.
Release	Select the release in which the project request belongs. Available releases are based on the project business unit of the project request. See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Releases, page 39.
Release Date	Displays the release date that is associated with the release.
Application Area and **Application**	Select the application area and application in which the project request belongs. Available applications are based on the application area that you selected. You must enter an application area before you enter an application. See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Application Areas, page 37.

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

Submitted: Indicates that the project request is 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 that is 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 that the project request is 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 status is *Submitted* and when the cost estimate 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 that the project request is submitted, approved by the project owner, and is 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, and a project owner approves a request, the request status changes to *Operationally Approved* instead of being changed directly to *Approved.*

Approved: Indicates that the project request is submitted and approved by the project owner, and if necessary, the funding department managers. When a project request has a status of *Approved,* its status cannot be changed. When 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 that project request is cancelled. A project request can only become cancelled when it has a status of *Pending* or *Returned.* After a project request has a *Cancelled* status, its status cannot change.

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

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

Department

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

Investment Type

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

This field is used for informational purposes only.

Integration Template

Select the project integration template that is 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 that are used in other PeopleSoft applications.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up PeopleSoft Project Costing Control Data," Defining Templates for Integration with Other Applications.

Project Manager

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

Note. When you modify the current project manager on the Resource Detail page, the system changes the project manager on the project request to match. Conversely, when you modify the project manager on the project request, the system changes the project manager on the Resource Detail page.

Category

Select the category in which the project request belongs.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Categories, page 37.

Approval Information

The system uses the fields that are in this section for approval workflow, which is activated when you submit a project for approval.

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Sponsor

Select the person who is endorsing this project.

Depending on the PeopleSoft Program Management installation settings for workflow, this individual might 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 it is appropriate.

Depending on the established installation-level workflow options settings, the individual whose name appears in this field might receive workflow email notifications.

Approver

The system automatically populates this field with the Project Owner field value when you create a project request. After you submit the project request, this field becomes editable so that the project owner can change the approver to another individual, if it is 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 who is 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 the system derives from other pages that are in the Project Request component.

Currency

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

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

Note. If you enter 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.

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Cost, Benefits, and **Maintenance Cost**	These fields display the total estimated cost, benefit, and maintenance cost for the project request in the currency that appears 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	Displays the amount that the system calculates 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 and **View in Transaction Currency**	Click to view monetary amounts in the business unit's base currency or the project request transaction currency. The button acts as a toggle to switch the currency that is used to calculate amounts that appear on the Project Request page and the Summary Cost/Benefits page. If the business unit's base currency and the project request transaction currency are the same, the amounts do not change. If no conversion factor exists, the system sets the conversion factor to 1.

Project Request 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 and 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 to submit a pending or returned project request for approval.
Cancel	Click to cancel this project request.

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Create a New Project Request Version Click to create a new version of this request.

The system creates a new project request with several of the fields populated with values that are from the original project request. Edit the values that differ for this version, add new values, then save or submit the project request. This button is available only when the project request status is in one of these statuses:

Submitted: The button does not display when you submit the project request. You must exit and reaccess the page to see it.

Declined

Costing

See Also

Chapter 8, "Establishing Project Requests," Understanding Project Requests, page 93

Chapter 8, "Establishing Project Requests," Project Request Approval Workflow, page 94

Associating Attachments with Project Requests

Access the Attachments page (Program Management, Project Request, Project Request, Attachments).

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.

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

Establishing Estimated Cost

Access the Cost page (Program Management, Project Request, Project Request, Cost).

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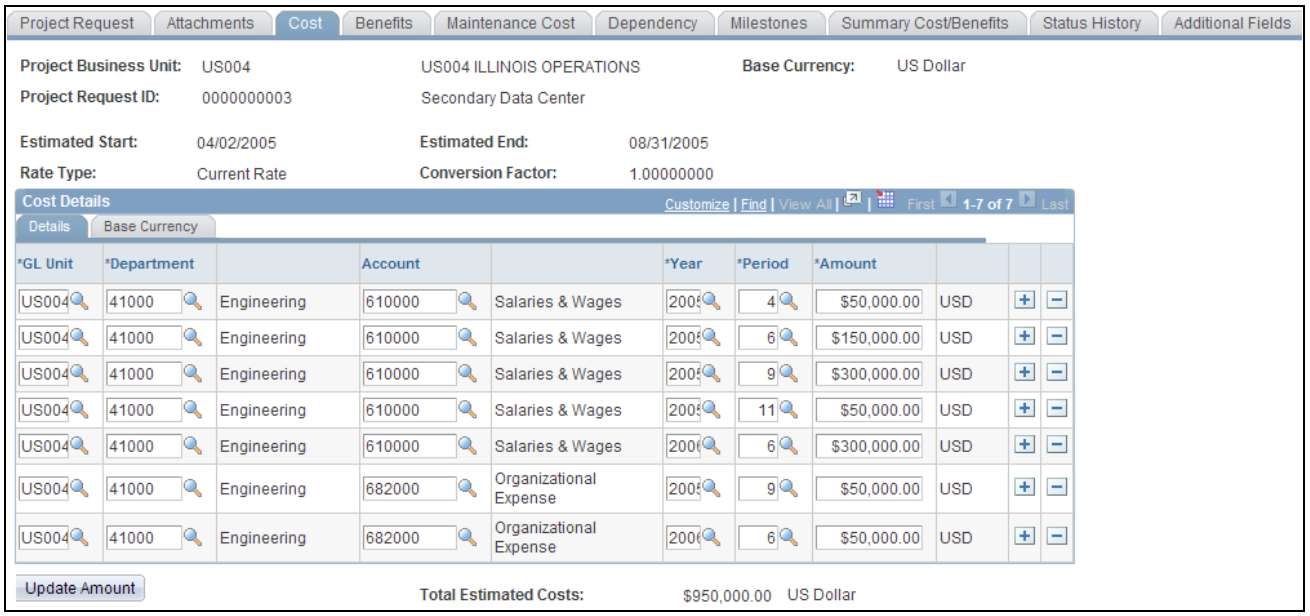

Cost page

Use this page to view and edit cost information that is related to the project or program that 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. Add necessary rows to enter all costs that are associated with the project.

Cost Details - Details Tab

GL Unit (general ledger business unit) — Enter the general ledger business unit that is associated with this cost.

Department — Select the department that is associated with this cost. Only departments of the specified general ledger business unit are valid.

Account — Select the account to which the cost is attributed. Only accounts of the specified general ledger business unit are valid.

Year and **Period** — Enter the fiscal year and period in which the cost is incurred.

Amount — Enter the cost amount in the currency of the project request. The currency code appears next to the amount field.

Update Amount — Click this button to update the amounts on the main project request page based on the data that is 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.

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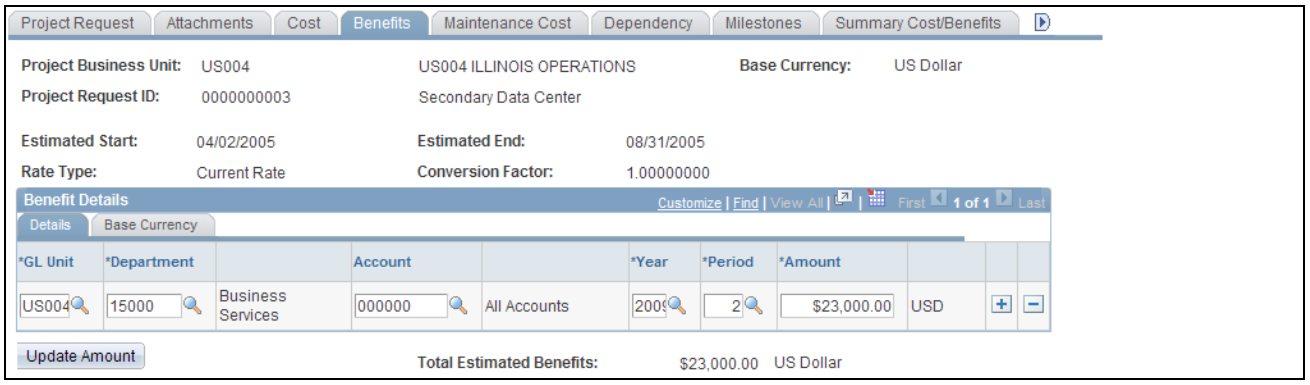
Click the Comments icon to access the Comments page, where you can enter notes that pertain to this cost estimate.

Note. If a project request has comments in the Cost Details grid, and an approver changes the project request status to *Costing*, the comments are lost when the project manager ultimately updates the project request with the revised cost estimate. To ensure that comments are always maintained, users can 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 (Program Management, Project Request, Project Request, Benefits).



Benefits page

Enter the expected benefits for the project, by general ledger business unit, department, and account, and add rows as needed. The benefits are the expected cash inflows that are related to the proposed effort. The fields that are on this page operate identically to fields that are on the Cost page.

See Chapter 8, "Establishing Project Requests," Establishing Estimated Cost, page 108.

Note. If a project request has comments in the Benefit Details grid, and an approver changes the project request status to costing, the comments are lost when the project manager updates the project request with the revised cost estimate. To ensure that comments are always maintained, users can 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 (Program Management, Project Request, Project Request, Maintenance Cost).

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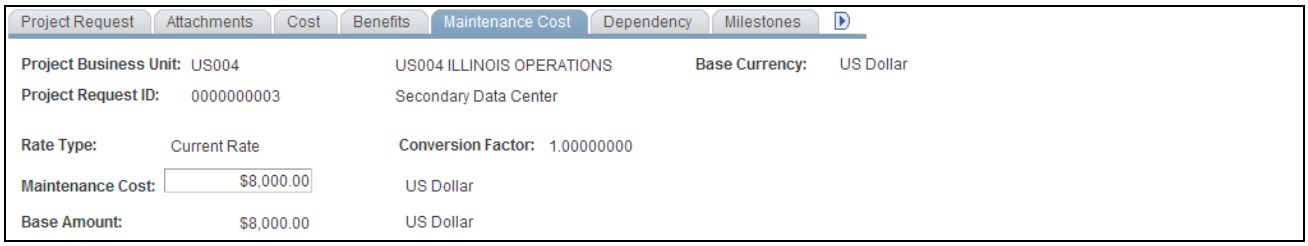
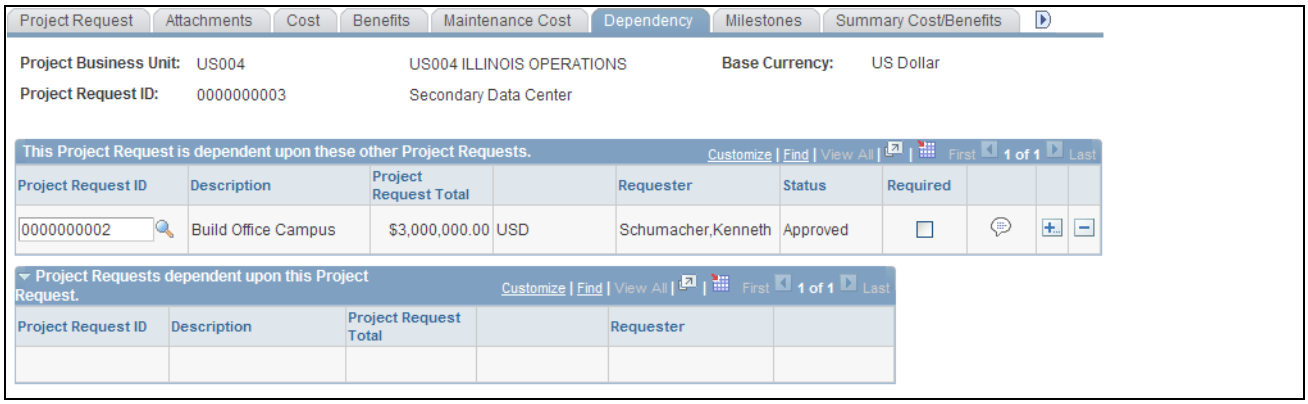


Maintenance Cost page

Enter the annual costs that you expect the project to 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 (Program Management, Project Request, Project Request, Dependency).



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

Click the Comments icon 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 (Program Management, Project Request, Project Request, Milestones).

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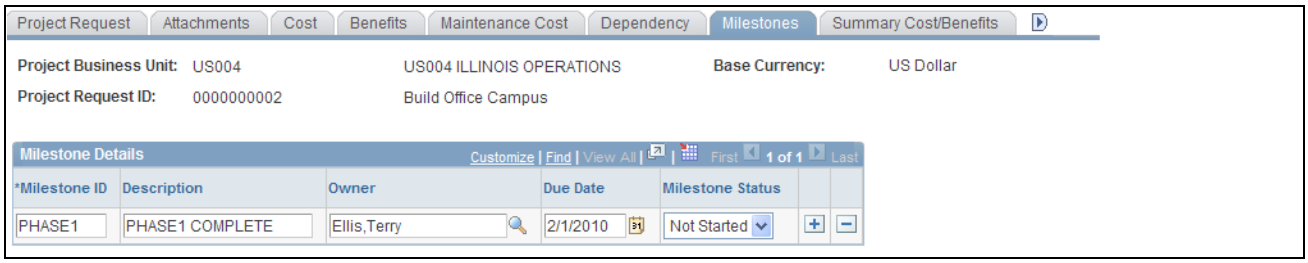


Milestones page

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 who is 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

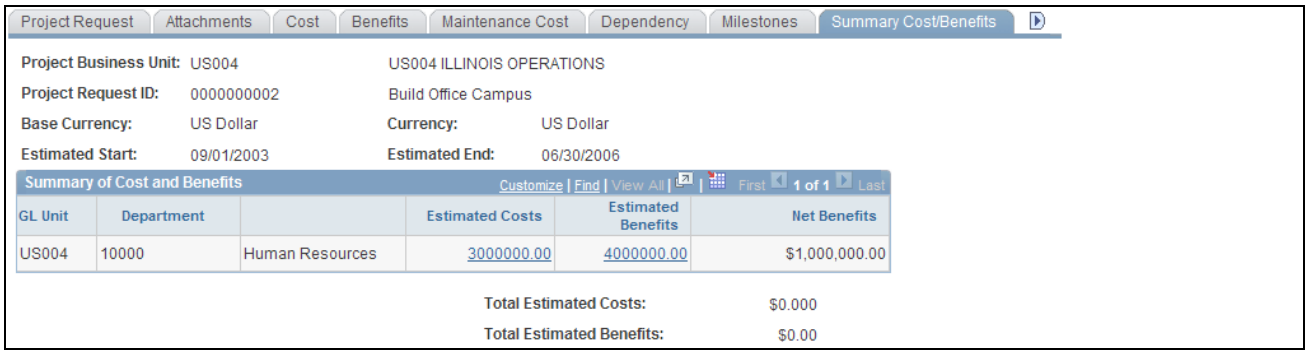
Complete

In Progress

Not Started

Reviewing Project Costs and Benefits

Access the Summary Cost/Benefits page (Program Management, Project Request, Project Request, Summary Cost/Benefits).



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

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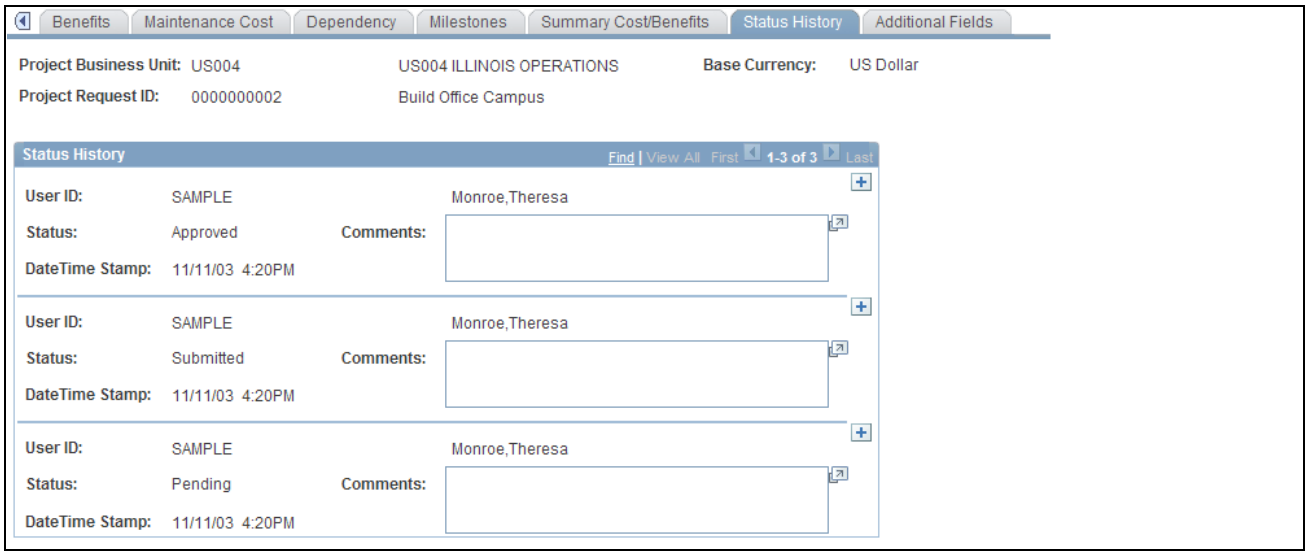
Estimated Benefits Click to access the Project Benefits Details page, where you can view all benefits that are associated with the current department for this project request.

Reviewing Project Request Status History

Access the Status History page (Program Management, Project Request, Project Request, Status History).



Status History page

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

Entering Additional Project Request Fields

Access the Additional Fields page (Program Management, Project Request, Project Request, Additional Fields).

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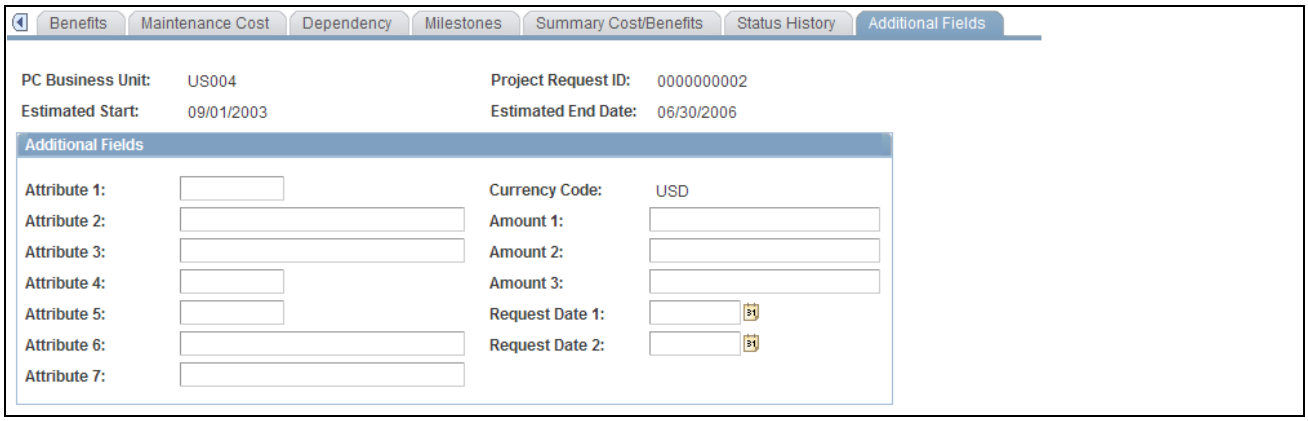

Additional Fields page

Use this page to enter additional user-defined information about the project request. You can capture user-specific attributes of a project request in seven text fields, three amount fields, and two date fields that are stored in the Project Request record (BC_PROJ_REQUEST).

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	*Definition 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.

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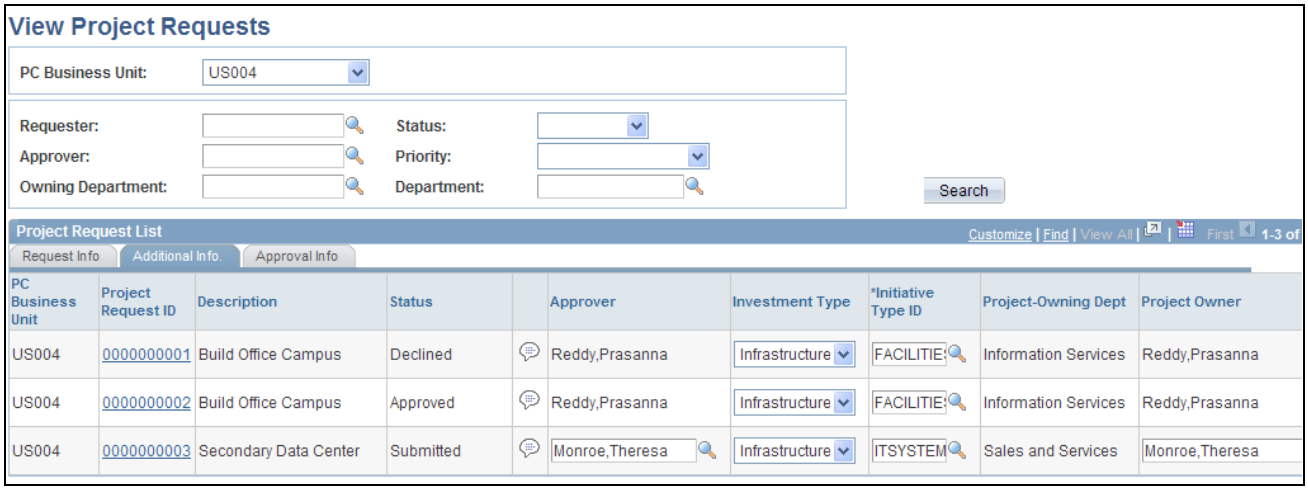
Page Name	Definition Name	Navigation	Usage
Project Request Estimate Summary	PGM_PR_SUM	Program Management, Project Request, Project Request Est. Summary	Review the totals of a revised project or program cost estimate and update the associated project request with the revised cost estimate.

Reviewing Established Project Requests

Access the View Project Requests page (Program Management, Project Request, View Project Requests).



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 facilitates the job that project owners and approvers perform. It enables them to quickly find, analyze, and dispatch project requests. Because this page is able to access and manipulate all of the data that is on a project request, including its status, it is important to restrict access to this component to the appropriate people within the 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.

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Additional Info. Tab

This tab displays additional information that pertains 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.

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

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.

Set Status

For each project request that appears 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 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, only *Submitted* and *Cancelled* are valid statuses for a *Pending* project request, while you can change a *Submitted* request to *Approved* (or *Operationally Approved* if funding department manager approval is required), *Declined*,*Costing*, or *Returned.*

Note. You cannot change the status to *Approved* if there is no cost estimate for this project request.

See Chapter 8, "Establishing Project Requests," Project Request Approval Workflow, page 94.

Revising Project Request Cost Estimates

Access the Project Request Estimate Summary page (Program Management, Project Request, Project Request Est. Summary).

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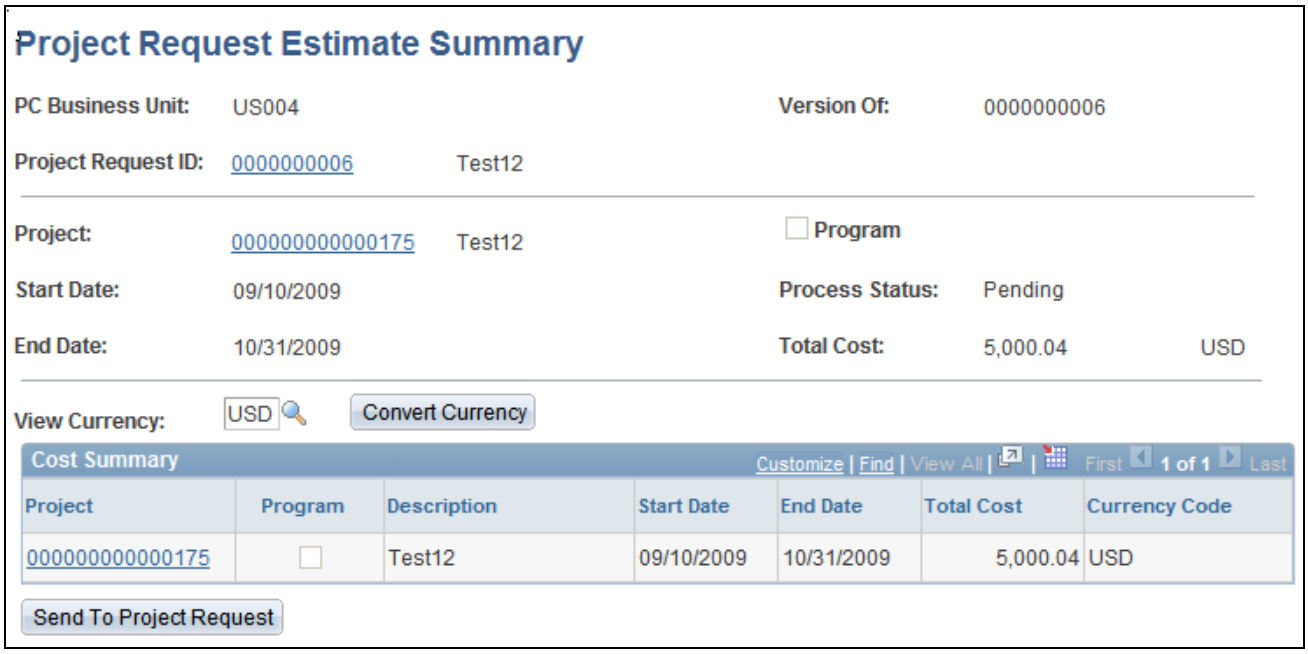

Project Request Estimate Summary page

This page displays only projects and programs that have budgets and are associated with project requests that are in costing status. The project or program that is associated with the project request must be included in the enterprise program tree to use this page.

This system converts costs on this page to a common currency that is based on this algorithm:

1. All cost estimates that are 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.

Project Request ID Click to access the Project Request component where you can view and edit details regarding the project request.

Project ID Click to access the Project Definition component where you can view and edit details regarding the project.

View Currency Enter the currency in which to view amounts.

Convert Currency Click to restate all of the estimated project costs in the currency that you specified in the View Currency field.

Project Click the project identifier to transfer to the Project Budget Plan page or the Program Budget Plan page, where you can view and edit the budget plan for this project or program.

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Send to Project Request Click to launch the Send Estimate to Project Request Application Engine process, which loads all of the detailed cost estimate information from the program or project cost budget plan.

See Also

Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22

PeopleSoft Project Costing 9.1 PeopleBook, "Setting Up Project Business Units," Defining Project Business Units

Converting Currency

This section provides an overview of the convert currency utility and discusses how to run currency conversions.

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, cancelled, or declined.

This currency conversion utility addresses situations. For example, an approver evaluates two project requests that are created on different dates. Both project requests have the same cost amounts and are entered in a transaction currency of Canadian dollars. If the effective currency conversion rates differ on the dates that each project request is created, the project requests appear to have different cost amounts when they are viewed in the base currency, such as Japanese yen, because they use different exchange rates.

Page Used to Convert Currency

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

Running Currency Conversion

Access the Process Currency Conversions page (Program Management, Project Request, Currency Conversion).

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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 that are stored on the project request. The process uses the rate that is currently in effect for the rate type that is specified on the Conversion Rate Type page.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining the Currency Conversion Rate Type, page 46.

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Chapter 9

Using Schedule Dependencies and Constraints

This chapter provides overviews of schedule dependencies, activity constraints, integration of dependencies and constraints with Microsoft Project, and project schedule indicators, and discusses how to:

- Specify schedule dependencies.
- Specify activity constraints.

Understanding Schedule Dependencies

This section provides overviews of:

- Dependency types and relationships.
- Activities with multiple dependencies.
- Dependencies across projects.
- Copying projects with dependent activities.

Dependency Types and Relationships

A dependency is a logical relationship between two project activities in which the start or end date of one activity depends on the start or end date of another activity. The activity that depends on the other activity is the successor, and the activity that it depends on is the predecessor. The system calculates the successor activity's start date, end date, or duration based on the dependency relationship, dependency type, and calculation method that you establish.

You can define multiple activity successors and activity predecessors for each project activity. The system sets the start and end dates of new activities that are equal to the project start date. You can manually update the dates and duration, or use dependencies and constraints to determine the activity start and end dates.

The best practice for project activity scheduling is to set dependencies and constraints on all activities to drive the project schedule rather than manually updating every activity date. When you specify a dependency on an activity, the predecessor activity schedule might affect the successor activity schedule. If that successor activity has additional related dependencies, there can be a cascading effect on many activity dates. You can select the activity date cascade calculations option on the Project General - Program Management page to specify when to calculate activity dates and roll them up to summary activities. Delaying the summary date rollup can help you manage system performance.

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This table identifies the system calculation processing based on the activity date cascade calculations options.

Activity Date Cascade Calculations Option	*System Calculation Processing*
Manual	The system does not calculate any of the activity schedule. You must manually enter the activity's start date, end date, and duration. The system does not roll up activity start and end dates to summary activities.
Delay Calculations Until Save	Certain date processing occurs immediately upon field edits, and other date processing and summary roll-ups occur when you save. At save, the system rolls up the activity start and end dates to summary activities. Additionally, the system updates the successor activity dates as a result of dependencies, constraints, or changes to predecessor activities.
Realtime Calculation	Activity dependency changes and predecessor date changes flow through the schedule as soon as the changes are made. Summary activity date processing occurs immediately.

Define dependencies on the Activity Predecessors page where you specify predecessor projects, predecessor activities, dependency types, and lead or lag time. Dependency types that you can establish include:

- *End-to-Start:* The start date of the successor activity is based on the end date of the predecessor activity.
- *End-to-End:* The end date of the successor activity is based on the end date of the predecessor activity.
- *Start-to-Start:* The start date of the successor activity is based on the start date of the predecessor activity.
- *Start-to-End:* The end date of the successor activity is based on the start date of the predecessor activity.

Additionally, you can define a lag time or lead time for dependency relationships. Lag time is the delay between activities that have a dependency. Lead time is the overlap between activities that have a dependency.

Activity Date Calculation Methods

The system calculates activity start date, end date, and duration based on the calculation method that you specify at the activity level and the lag or lead time that you specify when you create the dependency.

You specify the calculation method in the Calculate field on the Project Activities page or the Activity Definitions - General Information page. The available options are:

- *Duration:* The system calculates the duration, in whole work days, of the activity based on the start date and end date using this formula: (End Date) – (Start Date) = (Duration).
- *End Date:* The system calculates the end date of the activity based on the start date and duration using this formula: (Start Date) + (Duration) = (End Date).
- *Start Date:* The system calculates the start date of the activity based on the duration and end date using this formula: (End Date) – (Duration) = (Start Date).

Specify lead or lag time, in whole work days, in the Lag field on the Activity Predecessors page.

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Lag time is the delay between activities that have a dependency. For example, if you need a two-day delay between the end of one activity and the start of another, you can establish an end-to-start dependency and specify a lag time of two days. Lag time is expressed with a positive whole number in the Lag column of the Activity Predecessors page.

Lead time is the overlap between activities that have a dependency. For example, if an activity can start when its predecessor is two weeks from its end date, you can establish and end-to-start dependency with a lead time of ten days for the successor activity. Lead time is expressed with a negative whole number in the Lag column of the Activity Predecessors page.

End-to-Start Dependencies

For an end-to-start dependency, the system sets the start date of the successor activity to the next working day after the predecessor's end date plus or minus any lag or lead time. When the calculation method is:

- *End Date:* The system sets the successor's end date to its new start date plus the duration, plus or minus any lag or lead time.
- *Duration:* The end date remains as it was and the system sets the duration to the number of working days from the new start date to the existing end date, plus or minus and lag or lead time.

Note. You cannot set an end-to-start dependency on an activity that has the start date calculation method.

This table shows activities, durations, start dates, and end dates before you establish the end-to-start dependency:

Activity	*Duration*	*Start Date*	*End Date*
Develop	15 days	June 1 (Monday)	June 19 (Friday)
Unit Test	5 days	June 1 (Monday)	June 5 (Friday)

This table shows the effect on the successor activity start and end dates based on the end-to-start dependency with an end date calculation method:

Dependency Relationship	*Dependency Type*	*Lag*	*Activity*	*Duration*	*Start Date*	*End Date*
Predecessor			Develop	15 days	June 1 (Monday)	June 19 (Friday)
Successor	End-to-Start on Develop Activity	2 days	Unit Test	5 days	*June 24* (Wednesday)	*June 30* (Tuesday)

Note. For the examples in this chapter, the duration, start date, and end date are based on the work days in a business calendar with Monday-Friday work weeks.

End-to-End Dependencies

For an end-to-end dependency, the system sets the successor activity's end date to the predecessor activity's end date plus or minus any lag or lead time. When the calculation method is:

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- *Start Date:* The system sets the successor's start date to its end date minus the duration, plus or minus any lag or lead time.
- *Duration:* The start date remains as it was and the system sets the duration to the number of working days from the new end date to the existing start date, plus or minus and lag or lead time.

Note. You cannot set an end-to-end dependency on an activity that has the end date calculation method.

This table shows activities, durations, start dates, and end dates before you establish the end-to-end dependency:

Activity	*Duration*	*Start Date*	*End Date*
Develop	15 days	June 1 (Monday)	June 19 (Friday)
Unit Test	5 days	June 1 (Monday)	June 5 (Friday)

This table shows the effect on the successor activity start and end dates based on the end-to-end dependency and start date calculation method:

Dependency Relationship	*Dependency Type*	*Lag*	*Activity*	*Duration*	*Start Date*	*End Date*
Predecessor			Develop	15 days	June 1 (Monday)	June 19 (Friday)
Successor	End-to-End on Develop Activity	–1 day (Lead)	Unit Test	5 days	*June 12* (Friday)	*June 18* (Thursday)

Start-to-Start Dependencies

For a start-to-start dependency, the system sets the successor activity's start date to the predecessor activity's start date plus or minus any lag or lead time. When the calculation method is:

- *End Date:* The system sets the successor's end date to its start date plus the duration, plus or minus any lag or lead time.
- *Duration:* The end date remains as it was and the system sets the duration to the number of working days from the new start date to the existing end date, plus or minus and lag or lead time.

Note. You cannot set a start-to-start dependency on an activity that has the start date calculation method.

This table shows activities, durations, start dates, and end dates before you establish the start-to-start dependency:

Activity	*Duration*	*Start Date*	*End Date*
Develop	15 days	June 1 (Monday)	June 19 (Friday)
Unit Test	5 days	June 15 (Monday)	June 19 (Friday)

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This table shows the effect on the successor activity start and end dates based on the start-to-start dependency and an end date calculation method:

Dependency Relationship	Dependency Type	Lag	Activity	Duration	Start Date	End Date
Predecessor			Develop	15 days	June 1 (Monday)	June 19 (Friday)
Successor	Start-to-Start on Develop Activity	2 days	Unit Test	5 days	*June 3* (Wednesday)	*June 9* (Tuesday)

Start-to-End Dependencies

For a start-to-end dependency, the system sets the successor activity's end date to the predecessor activity's start date plus or minus any lag or lead time. When the calculation method is:

- *Start Date:* The system sets the successor's start date to its end date minus the duration, plus or minus any lag or lead time.
- *Duration:* The start date remains as it was and the system sets the duration to the number of working days from the new end date to the existing start date, plus or minus and lag or lead time.

Note. You cannot set a start-to-end dependency on an activity that has the end date calculation method.

This table shows activities, durations, start dates, and end dates before you establish the start-to-end dependency:

Activity	Duration	Start Date	End Date
Develop	15 days	June 1 (Monday)	June 19 (Friday)
Unit Test	5 days	June 1 (Monday)	June 5 (Friday)

This table shows the effect on the successor activity start and end dates based on the start-to-end dependency and Start Date calculation method:

Dependency Relationship	Dependency Type	Lag	Activity	Duration	Start Date	End Date
Predecessor			Develop	15 days	June 1 (Monday)	June 19 (Friday)
Successor	Start-to-End on Develop Activity	0 days	Unit Test	5 days	*May 26* (Tuesday)	*June 1* (Monday)

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Activities with Multiple Dependencies

You can set one or more dependencies on a successor activity. Each of these dependencies can consist of different types, such as an end-to-end dependency with a predecessor activity along with an end-to-start dependency with another predecessor activity. Each dependency can yield different effects on the successor's start and end dates. The system sets the successor dates and duration based on the predecessor activity that drives the successor dates to the latest date.

Example One of a Successor Activity with Multiple Dependencies

This table shows activities, durations, start dates, and end dates before you establish dependencies:

Activity	*Duration*	*Start Date*	*End Date*
Functional Design	10 days	June 1 (Monday)	June 12 (Friday)
Usability Design	2 days	June 1 (Monday)	June 2 (Tuesday)
Develop	15 days	June 1 (Monday)	June 19 (Friday)

This table shows the effect on the successor activity start and end dates based on the dependency relationships and types and an end date calculation method:

Dependency Relationship	*Dependency Type*	*Activity*	*Duration*	*Start Date*	*End Date*
Predecessor		Functional Design	10 days	June 1 (Monday)	June 12 (Friday)
Predecessor		Usability Design	2 days	June 1 (Monday)	June 2 (Tuesday)
Successor	• End-to-Start on Functional Design • Start-to-Start on Usability Design	Develop	15 days	*June 15* (Monday)	*July 3*(Friday)

The Functional Design and Usability Design activities are both predecessors to the Develop activity, However, the system uses the Functional Design activity end date to determine the Develop activity start and end dates. The next working day after the Functional Design activity end date drives the Develop activity dates to be later than if it was driven by the Usability Design activity start date.

Example Two of a Successor Activity with Multiple Dependencies

This table shows activities, durations, start dates, and end dates before you establish dependencies:

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Activity	*Duration*	*Start Date*	*End Date*
Functional Design	10 days	June 1 (Monday)	June 12 (Friday)
Usability Design	2 days	June 1 (Monday)	June 2 (Tuesday)
Develop	15 days	June 1 (Monday)	June 19 (Friday)
Unit Test	7 days	June 1 (Monday)	June 9 (Tuesday)

This table shows the effect on the successor activity start and end dates based on the dependency types and relationships and an end date calculation method:

Dependency Relationship	*Dependency Type*	*Activity*	*Duration*	*Start Date*	*End Date*
Predecessor		Functional Design	10 days	June 1 (Monday)	June 12 (Friday)
Predecessor		Usability Design	2 days	June 1 (Monday)	June 2 (Tuesday)
Predecessor		Develop	15 days	June 1 (Monday)	June 19 (Friday)
Successor	• End-to-Start on Functional Design • Start-to-Start on Usability Design • End-to-Start on Develop	Unit Test	7 days	*June 22* (Monday)	*June 30* (Tuesday)

The system uses the Develop activity to determine the Unit Test activity's dates. The end date for the Develop activity drives the Unit Test activity dates to be later than the Functional Design activity end date and the Usability Design activity start date.

Dependencies Across Projects

Use the Activity Predecessors page to define a dependency between a successor activity on one project and a predecessor activity on a different project. You can define dependencies across projects as long as the projects are within the same business unit.

The system uses the scheduling calculation method that is specified at the project level of the successor activity if the successor's dates must change to align with the new dependency relationship. The system allows multiple levels of cross-project dependencies.

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The system automatically triggers Change Request workflow for cross-project dependencies. If you change the dates for a predecessor activity that affect the dates for the successor activity, the system automatically sends a change request to the project manager of the project with the successor activity. If the project manager approves the change request, the system uses date processing rules for dependencies to update the successor activity dates or remove the dependency if there is a conflict. If the project manager rejects the change request, the system leaves the successor activity dates as they were and removes the dependency between the two projects' activities.

See Also

Chapter 16, "Controlling Project Changes," Change Requests for Cross-Project Dependencies, page 281

Copying Projects with Dependent Activities

On project templates, you can set up dependencies within a single project. The system calculates the correct activity start dates and end dates for the new project based on the dependency. If you create projects from copies of existing projects, the system copies dependencies within that project to the target project.

Understanding Activity Constraints

This section provides overviews of activity constraints and copying activities with constraints.

Activity Constraints

A constraint is a restriction that you place on an activity to control the activity's start date or end date. You can define flexible, moderately flexible, or inflexible constraints.

- Flexible constraints work with dependencies to make an activity occur as soon or as late as the dependency will allow.

  For example, the system schedules an activity with an As Soon As Possible constraint and an end-to-start dependency as soon as the predecessor activity ends.

  Flexible constraints are:

  - As Soon As Possible
  - As Late As Possible

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- Moderately flexible constraints work with dependencies to force activities to occur before or after dates that you specify.

  For example, you can establish an end-to-start dependency that assigns the start date of September 13 on an activity with a Start No Later Than constraint for September 14.

  Moderately flexible constraints are:

  - End No Earlier Than
  - Start No Earlier Than
  - Start No Later Than
  - End No Later Than

- Inflexible constraints force the activity dates to follow the constraint.

  For example, an activity with a Must End On constraint for July 10 and an end-to-start dependency on another activity will always have an end date of July 10 no matter when the predecessor activity's date ends.

  Inflexible constraints are:

  - Must Start On
  - Must End On

Each activity can have only one constraint type, which determines when the activity can start or end. For summary activities, you can select only As Soon As Possible, End No Later Than, or Start No Earlier Than constraint types.

If users try to change detail activities to summary activities, and the detail activities have constraints that are not valid for summary activities, the user must either remove the constraint or leave the activity as a detail activity.

If no constraint type is specified for an activity, users can enter any start and end dates, as long as the dates do no violate any existing dependencies for the activity, and the activity is a detail activity.

On the Project General - Program Management page, you can select a project-level option that requires that activities always honor the constraint. If you select this option:

- Users cannot manually schedule a start date or end date that falls outside of an activity's constraint.
- If a schedule change to a predecessor activity causes a successor activity's dates to violate its constraint, the user must either resolve the scheduling conflict or remove the dependency.
- If a new predecessor activity causes the successor activity to violate its constraint, the start and end dates for the successor activity will still honor the constraint date.

If you do not require activities to honor the constraint, users can change activity start and end dates manually or through dependency relationships. The constraint remains on the activity but the system allows the activity dates to change even if they violate the constraint.

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As Soon As Possible Constraint

Use the As Soon As Possible constraint for the system to schedule the activity as early as it can, based on these rules:

- The system assigns the start date of the activity to the start date of the project.
- If the activity is a summary activity, the start date is based on the earliest start date of its children.
- If you establish dependencies on the activity, the system assigns the activity start and end dates based on the dependency.
- If you remove dependencies from the activity, the system assigns the activity date as the start date of the project.
- If you delete this constraint, the system does not change the activity start and end dates.

  You can manually modify the activity dates.
- If you manually modify the activity start date or end date, the system removes this constraint.
- If you change the activity duration, the system recalculates the end date but does not change the constraint.

Note. You cannot enter an As Soon As Possible constraint if the calculation method is *Start Date.*

As Late As Possible Constraint

Use the As Late As Possible constraint for the system to schedule the activity as late as it can, based on these rules:

- The system assigns the end date of the activity to the end date of the project.
- If you establish dependencies on the activity and you enable the option for activities to always honor constraint dates, the system assigns the activity end date as the end date of the project.

  However, if you disable the option for activities to always honor constraint dates, the system assigns the end date based on the dependencies.
- If you remove dependencies from the activity, the system assigns the activity end date as the end date of the project.
- If you delete this constraint, the system assigns the activity start date based on the project start date.
- If you manually modify the activity end date, the system removes this constraint.
- If you change the activity duration, the system recalculates the start date but does not change the constraint.

Note. You cannot enter an As Late As Possible constraint if the calculation method is *End Date.*

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End No Earlier Than

Use the End No Earlier Than constraint to establish the earliest possible date that an activity could end. The activity cannot finish any time before the date you specify. The system determines the schedule based on these rules:

- If you assign a constraint date that is the same as or occurs before the activity end date, the system does not change the activity end date.
- If you modify an activity so that the end date falls after the constraint date, the system does not change the constraint date.
- When you enable the option for activities to always honor constraint dates:
    - If you set a constraint date to fall after the activity end date, the system updates the activity end date to the constraint date.
    - If you modify an activity end date to a date that is earlier than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity end date to occur before the constraint date, the system ignores the dependency and does not change the successor or predecessor dates.
- When you disable the option for activities to always honor constraint dates:
    - If you assign a constraint date to fall after the activity end date, the system updates the activity end date to the constraint date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the end date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
    - If you modify an activity end date to a date earlier than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the end date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity end date to occur before the constraint date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
- If you remove all dependencies from an activity, the system tries to enforce the constraint and assigns the activity end date as the constraint date. However, if the existing dates on the activity conflict with the constraint, which could happen if the option for activities to always honor constraint dates is disabled, the system gives you the option to remove the dependency or remove the constraint.
- If you delete this constraint and have no dependencies on the activity, the system assigns the activity start date based on the project start date.

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Start No Earlier Than

Use the Start No Earlier Than constraint to establish the earliest possible date that an activity can begin. The activity cannot start any time before the date you specify. The system determines the schedule based on these rules:

- If you assign the constraint date that is the same as or occurs before the activity start date, the system does not change the activity start date.
- If you modify an activity so that the start date falls after the constraint date, the system does not change the constraint date.
- When you enable the option for activities to always honor constraint dates:
    - If you set a constraint date to fall after the activity start date, the system updates the activity start date to the constraint date.
    - If you modify an activity start date to a date that is earlier than the constraint date, you violate the constraint and receive an error giving you the option to remove the constraint or preserve the constraint and not change the activity start date.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity start date to occur before the constraint date, the system ignores the dependency and does not change the successor or predecessor dates.
- When you disable the option for activities to always honor constraint dates:
    - If you assign a constraint date to fall after the activity start date, the system updates the activity start date to the constraint date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the start date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
    - If you modify an activity start date to a date earlier than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the start date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity start date to occur before the constraint date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
- If you remove all dependencies from an activity, the system tries to enforce the constraint and assigns the activity start date as the constraint date. However, if the existing dates on the activity conflict with the constraint, which could happen if the option for activities to always honor constraint dates is disabled, the system gives you the option to remove the dependency or remove the constraint.
- If you delete this constraint and have no dependencies on the activity, the system assigns the activity start date based on the project start date.

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Start No Later Than

Use the Start No Later Than constraint to establish the latest possible date that an activity could start. The activity can start anytime on or before the date that you specify. The system determines the schedule based on these rules:

- If you assign a constraint date that is the same as or falls after the activity start date, the system does not change the activity start date.
- If you modify an activity so that the start date occurs before the constraint date, the system does not change the constraint date.
- When you enable the option for activities to always honor constraint dates:
    - If you set a constraint date to occur before the activity start date, the system updates the activity start date to the constraint date.
    - If you modify an activity start date to a date that is later than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity start date.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity start date to occur after the constraint date, the system ignores the dependency and does not change the successor or predecessor dates.
- When you disable the option for activities to always honor constraint dates:
    - If you assign a constraint date to occur before the activity start date, the system updates the activity start date to the constraint date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the start date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
    - If you modify an activity start date to a occur later than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the start date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity start date to occur after the constraint date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
- If you remove all dependencies from an activity, the system tries to enforce the constraint and assigns the activity start date as the constraint date. However, if the existing dates on the activity conflict with the constraint, which could happen if the option for activities to always honor constraint dates is disabled, the system gives you the option to remove the dependency or remove the constraint.
- If you delete this constraint and have no dependencies on the activity, the system assigns the activity start date based on the project start date.

End No Later Than

Use the End No Later Than constraint to establish the earliest possible date that an activity could end. The activity can end on or before the date you specify. The system determines the schedule based on these rules:

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- If you assign the constraint date that is the same as or occurs after the activity end date, the system does not change the activity end date.
- If you modify an activity so that the end date occurs before the constraint date, the system does not change the constraint date.
- When you enable the option for activities to always honor constraint dates:
    - If you set a constraint date to occur before the activity end date, the system updates the activity end date to the constraint date.
    - If you modify an activity end date to later date than the constraint date, you violate the constraint and receive an error giving you the option to remove the constraint or preserve the constraint and not change the activity end date.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity end date to occur after the constraint date, the system ignores the dependency and does not change the successor or predecessor dates.
- When you disable the option for activities to always honor constraint dates:
    - If you assign a constraint date to occur before the activity end date, the system updates the activity end date to the constraint date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the end date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
    - If you modify an activity end date to a later date than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date, unless the activity has dependencies that affect the activity schedule.

      If the activity has dependencies that affect the end date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
    - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity end date to occur after the constraint date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
- If you remove all dependencies from an activity, the system tries to enforce the constraint and assigns the activity end date as the constraint date. However, if the existing dates on the activity conflict with the constraint, which could happen if the option for activities to always honor constraint dates is disabled, the system gives you the option to remove the dependency or remove the constraint.
- If you delete this constraint and have no dependencies on the activity, the system assigns the activity start date based on the project start date.

Must Start On

Use the Must Start On constraint to specify the exact date when an activity must start. The system determines the schedule based on these rules:

- The system assigns the start date of the activity to equal the constraint date.

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- When you enable the option for activities to always honor constraint dates:
  - If you modify the constraint date, the system updates the activity start date to the constraint date.
  - If you modify an activity start date to a different date than the constraint date, you violate the constraint and receive an error giving you the option to remove the constraint or preserve the constraint and not change the activity start date.
  - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity start date and the constraint date to differ, the system does not change the activity start date. The system allows you to set the dependency, but it does not enforce the dependency.
- When you disable the option for activities to always honor constraint dates:
  - If you modify the constraint date, the system updates the activity start date to match the constraint date, unless the activity has dependencies that affect the activity schedule.

    If the activity has dependencies that affect the start date, the system uses the dependency to drive the activity schedule and assigns the start date based on the dependency.
  - If you modify an activity start date to a different date than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date, unless the activity has dependencies that affect the activity schedule.

    If the activity has dependencies that affect the start date, the system uses the dependency to drive the activity schedule and assigns the end start based on the dependency.
  - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity start date to differ from the constraint date, the system uses the dependency to drive the activity schedule and updates the successor activity's start date based on the dependency.
- If you remove all dependencies from an activity, the system tries to enforce the constraint and assigns the activity start date as the constraint date. However, if the existing dates on the activity conflict with the constraint, which could happen if the option for activities to always honor constraint dates is disabled, the system gives you the option to remove the dependency or remove the constraint.
- If you delete this constraint and have no dependencies on the activity, the system assigns the activity start date based on the project start date.

Must End On

Use the Must End On constraint to specify the exact date for which the activity must be completed. The system determines the schedule based on these rules:

- The system assigns the end date of the activity equal to the constraint date.

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- When you enable the option for activities to always honor constraint dates:
  - If you modify the constraint date, the system updates the activity end date to the constraint date.
  - If you modify an activity end date to a different date than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date.
  - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity end date to differ from the constraint date, the system does not change the activity end date. The system allows you to define the dependency, but if does not enforce the dependency.
- When you disable the option for activities to always honor constraint dates:
  - If you modify the constraint date, the system updates the activity end date to the constraint date, unless the activity has dependencies that affect the activity schedule.

    If the activity has dependencies that affect the end date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
  - If you modify an activity end date to a date different than the constraint date, you violate the constraint and receive an error message that allows you to remove the constraint or preserve the constraint and not change the activity end date, unless the activity has dependencies that affect the activity schedule.

    If the activity has dependencies that affect the end date, the system uses the dependency to drive the activity schedule and assigns the end date based on the dependency.
  - If you establish a dependency on an activity and the dependency relationship is such that it would cause the successor activity end date to differ from the constraint date, the system uses the dependency to drive the activity schedule and updates the successor activity's end date based on the dependency.
- If you remove all dependencies from an activity, the system tries to enforce the constraint and assigns the activity end date as the constraint date. However, if the existing dates on the activity conflict with the constraint, which could happen if the option for activities to always honor constraint dates is disabled, the system gives you the option to remove the dependency or remove the constraint.
- If you delete this constraint and have no dependencies on the activity, the system assigns the activity start date based on the project start date.

Copying Activities with Constraints

If you create a project activity from a copy of an existing activity, the system copies the constraint on that activity to the target activity. However, if you create a project activity from a template, the constraint on that activity does not copy to the target activity.

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Creating and Maintaining Projects"

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Understanding Integration of Dependencies and Constraints with Microsoft Project

Microsoft Project has dependencies and constraints that are similar to PeopleSoft Program Management's dependencies and constraints. All dependencies and constraints that you establish in Microsoft Project will transfer to PeopleSoft, and vice versa. It is possible for an activity schedule that you imported from Microsoft Project to differ in PeopleSoft and vice versa, because of differences in activity schedule calculations between PeopleSoft and Microsoft Project. You should maintain your smaller projects (less than one hundred activities) in PeopleSoft. However, for larger projects, you should use Microsoft Project as the master for the activity schedule. The system handles the integration process differently based on the source and target applications.

PeopleSoft to Microsoft Project Integration

The system uses these rules to assign constraints during the integration from PeopleSoft to Microsoft Project, because Microsoft Project requires a constraint on every activity, but PeopleSoft does not:

- If an activity does not have a constraint that is set in PeopleSoft and that activity has dependencies on other activities, the integration process sets an As Soon As Possible constraint on that activity in Microsoft Project and allows Microsoft Project to determine the activity's schedule based on the dependencies.
- If an activity does not have a constraint set and there are no dependencies, the system compares the activity start date with the project start date.
    - If the activity and project dates are the same, the integration process assigns an As Soon As Possible constraint on the activity.
    - If the activity date is later than the project start date, the integration processes assigns a Start No Earlier Than constraint and a constraint date that is equal to the activity start date.

This diagram shows the logic that the system uses to export dependency and constraint information from PeopleSoft to Microsoft:

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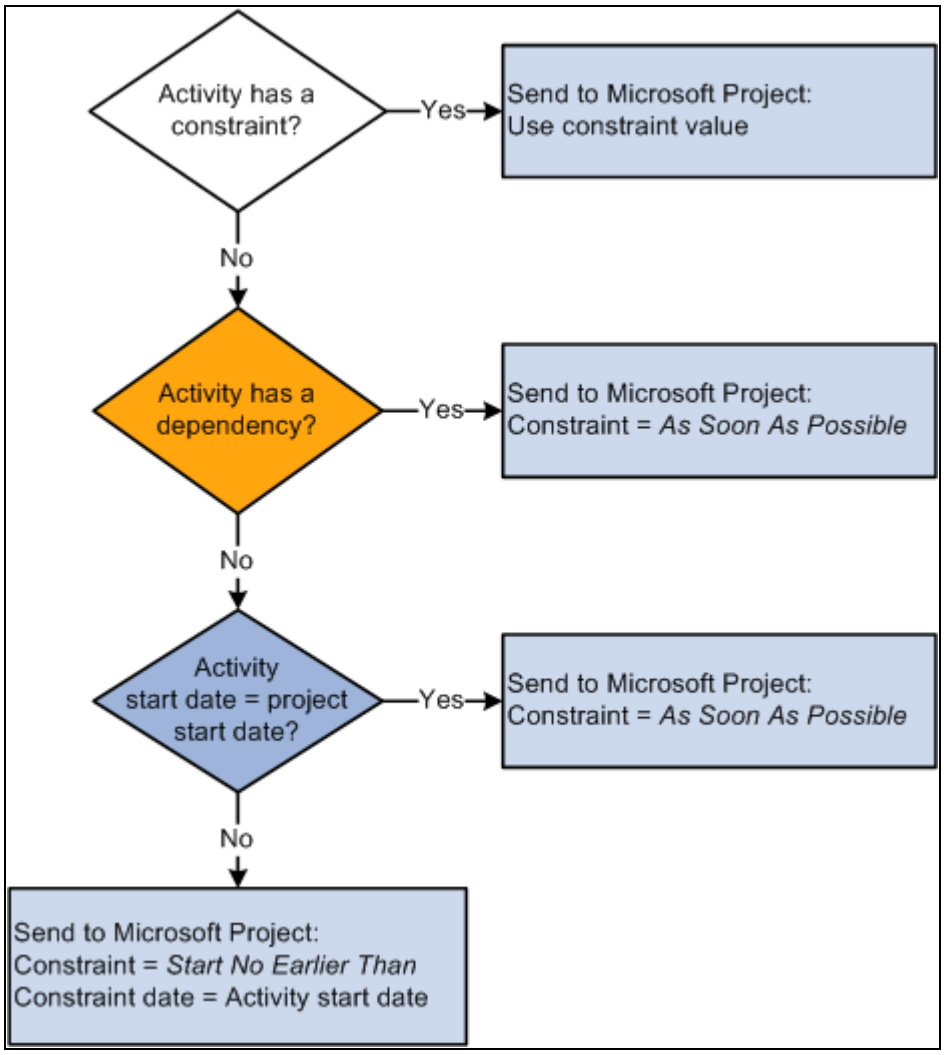

Exporting PeopleSoft activity dependency and constraint data to Microsoft

The integration process uses PeopleSoft's project-level date calculation method to determine the calculation method in Microsoft Project. This table displays the mapping between the PeopleSoft and Microsoft Project calculation method mapping to the Microsoft Project calculation method:

Activity Date Cascade Calculation Option In PeopleSoft	***Microsoft Project Calculation Method***
Manual	Manual
Delay Calculations Until Save	Manual, then, once in Microsoft Project, select Calculate Now
Realtime Calculations	Automatic

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Microsoft Project to PeopleSoft Integration

When you import projects from Microsoft Project to PeopleSoft, the integration process sets the activity date cascade calculation option to *Manual* . The system imports the activity schedule into PeopleSoft exactly as it was in Microsoft Project. The system does not recalculate the schedule in PeopleSoft. You can change the Activity Date Cascade Calculation option on the Project General - Program Management page after you import the project. However, if you change the activity date cascade calculation option, it is possible for an activity schedule that you imported from Microsoft Project to differ in PeopleSoft, because of differences in activity schedule calculations between PeopleSoft and Microsoft Project.

Additionally, the systems assigns the value in the Calculate field based on the project's default value in PeopleSoft for all activities without dependencies. The system assigns the duration calculation method for all activities with dependencies.

Since summary activities in PeopleSoft cannot have dependencies on other activities, if there are any summary activities with dependencies in Microsoft Project, the import process does not bring the dependencies into PeopleSoft. The system issues a warning to indicate that the dependencies on summary activities will not be imported into PeopleSoft. The schedule dates that Microsoft Project assigned as a result of dependencies that were set on summary tasks will not change during the import. You can view the details of this process on the Integration Session Log that you can view on the Create Project from Microsoft page.

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Integrating with Microsoft Project"

Understanding Project Schedule Indicators

During project planning and execution, project managers need to be alerted to various conditions that are associated with each activity. A column on the Project Activities page shows warning and informational visual indicators to alert project managers to attributes about each activity.

The Project Activities page displays a warning visual indicator if:

- An activity is scheduled for completion later than its deadline date.
- An activity has not been scheduled within its constraints.

The Project Activities page displays an informational visual indicator if:

- An activity has an inflexible constraint, such as Must End On, Must Start On, End No Later Than, or Start No Later Than.
- An activity has a flexible constraint, such as End No Earlier Than, Start No Earlier Than, As Soon As Possible, or As Late As Possible.

You can move the mouse across the indicator to view alternate text about the nature of these conditions. If more than one condition exists, click the indicator to access the Activity Alerts page to view the alert messages.

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See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Creating and Maintaining Activities"

Specifying Schedule Dependencies

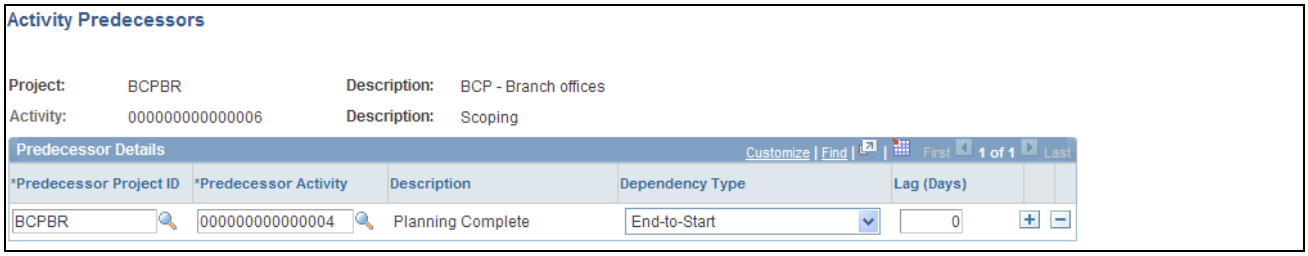
This section discusses how to specify activity predecessors.

Page Used to Specify Schedule Dependencies

Page Name	Definition Name	Navigation	Usage
Activity Predecessors	PGM_ACT_DEP_SEC	• Program Management, Activity Definitions, General Information, General Information Click the Review Predecessors link. • Program Management, Activity Definitions, Project Activities, Project Activities Click the Review Predecessors icon.	Select the project, activity, and dependency type to define the dependency.

Specify Activity Predecessors

Access the Activity Predecessors page (Program Management, Activity Definitions, General Information, General Information, click the Review Predecessors link).



Activity Predecessor page

The project, activity, and descriptions come from the successor activity for which you are defining this dependency.

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Predecessor Project ID Enter the project ID that contains the predecessor activity. The system defaults the project ID from the project from which you are entering this dependency. You can select a different project to create a cross-project dependency.

Predecessor Activity Enter the activity ID for the predecessor activity.

Dependency Type Enter the dependency type from these options:

- *End-to-End:* The system sets the successor activity's end date to the predecessor activity's end date plus or minus and lag or lead time.
- *End-to-Start:* The system sets the start date of the successor activity to the next working day after the predecessor's end date plus or minus any lag or lead time.
- *Start-to-End:* The system sets the successor activity's end date to the predecessor activity's start date plus or minus and lag or lead time.
- *Start-to-Start:* The system sets the start date of the successor activity to the predecessor's start date plus or minus and lead or lead time.

Lag (Days) Enter a number to determine the lead or lag time in whole work days between the dependency. Enter a positive number to specify lag time. Enter a negative number to specify lead time.

Specifying Activity Constraints

This section discusses how to specify activity constraints.

Page Used to Specify Activity Constraints

Page Name	*Definition Name*	*Navigation*	*Usage*
Activity Definitions - General Information	PROJ_ACT_DESCR	Program Management, Activity Definitions, General Information, General Information	Create an activity, specify a constraint, and assign the activity to a project.

Specifying Activity Constraints

Access the Activity Definitions - General Information page (Program Management, Activity Definitions, General Information, General Information).

The Activity Definitions - General Information page is documented in the PeopleSoft Project Costing PeopleBook. The fields documented here are specific to constraints.

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Constraint Type

Select the type of constraint from these options:

- blank: Leave the field blank if you do not want to define a constraint for this activity.
- *As Late As Possible:* This option is not available for summary activities.
- *As Soon As Possible*
- *End No Earlier Than:* This option is not available for summary activities.
- *End No Later Than*
- *Must End On:* This option is not available for summary activities.
- *Must Start On:* This option is not available for summary activities.
- *Start No Earlier Than*
- *Start No Later Than:* This option is not available for summary activities.

Constraint Date

Enter the date for the constraint. This field appears only if you select one of these constraint types:

- End No Earlier Than
- End No Later Than
- Must End On
- Must Start On
- Start No Earlier Than
- Start No Later Than

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Creating and Maintaining Activities," Entering Activity General Information

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Chapter 10

Scheduling and Managing Resources

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

- Add and modify project resources.
- Add and modify activity resources.
- Transfer resource assignments.
- Work with master resource schedules.
- Analyze resource lists.
- View the Resource Workbench.

Understanding Resource Tools

Successful delivery of a project depends in large part 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. This section lists prerequisites and discusses:

- Important concepts.
- Resource component pages.
- Resource status.
- Resource scheduling options.
- Resource assignments.
- Named resources and generic resources.
- Generic resource qualifications.
- Resource conflicts.
- Part-time assignments.
- Activity resource workflow.
- Microsoft Project resources.

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Prerequisites

To capture resource target qualifications for generic resources on the Resources page, you must:

- Have PeopleSoft Resource Management installed.
- Add resource qualifications in the PeopleSoft Resource Management application.
- Determine the specific attributes about the generic labor resources that you add to a project, including the resource's primary project role.

To create work orders for resources, you must have PeopleSoft Maintenance Management installed.

Important Concepts

When using resource pages in PeopleSoft Program Management, you need to understand these concepts:

Part-Time Assignment	An assignment in which a resource's schedule allocation for a project is less than 100 percent of the time that is scheduled for the project. For example, a project manager assigns a resource to a project that is two weeks long (80 hours total). The project manager can assign the resource for 50 percent of the time, which indicates that the resource will work for only 40 hours on that project.
Resource Class	Categorizes resources. Each resource class possesses unique attributes and requires different calculations for cost purposes. The system recognizes four types of resources: labor, material, assets, and other.
Work	Measures the amount of effort, in hours or days, that an activity requires. Applies only to labor resources.
Actual Work	Tracks the amount of time that a resource has currently expended working on an activity. The system updates this value based on time that is entered and approved in PeopleSoft Expenses.
Remaining Work	The amount of time that is 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 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. This percentage applies only to labor resources. For asset, material, and other resources the unit is defined by the unit of measure (UOM).

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Resource Component Pages

The Project Resource Plan 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 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 that help a project manager ensure that resources are staffed on activities at optimal levels.

- The Resource Detail page.

  Shows details for a specific resource and enables you to specify detailed project schedules that allow for gaps in the assignment dates or assign resources to multiple activities. You can also assign different project roles or units for each assignment schedule and override the default cost and bill rate types and rates for the resource.

- The Resources by Activity page.

  Shows the resources that are associated with a specific activity.

  This page is critical to assembling an appropriate mix of labor, asset, and material resources for each activity on a project. When you enter a labor resource and adjust 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 or days that the resource is slated to work on the task), the system can determine how long the activity requires to finish. 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 that are necessary to complete the activity. After each change, you can immediately see the impact to the duration for the activity 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 can deploy resources to activities, model costs, determine whether resources are appropriately used, 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 might want to construct and level the plan by 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 Microsoft Project.

  See *PeopleSoft Project Costing 9.1 PeopleBook*, "Integrating with Microsoft Project."

Resource Status

The Resource Status field on the Resources page enables you to track the life cycle of a resource on a project. This table lists the resource statuses, along with their usages, that can appear on the Resources page:

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Resource Status	***Usage***
Considered	Add a named or generic resource to the Resources page, and that resource has one or more assignment schedules. A PeopleSoft Resource Management assignment or allocation has not been initiated for the resource.
Requested	Manually change the status of a named or generic resource to this status. For PeopleSoft Resource Management-managed resources, this triggers the process of creating PeopleSoft Resource Management assignments for named resources or allocations for generic resources. For generic resources, the system sends a generic resource request to the Pool Manager Workbench. For non-PeopleSoft Resource Management-managed resources, the system changes the status to *Committed* after you save, but does not create a PeopleSoft Resource Management assignment. The PeopleSoft Resource Management assignment and allocation processes are based on the workflow settings in PeopleSoft Resource Management. If project manager approval is required, the project must have a project manager in *Committed* status and the resource remains in a requested status until approval is received. For generic resources, if the Pool Manager Approval required option on the Resource Management Options page is selected, the resource status remains as *Requested* until the pool manager approves the request. If approval is not required, after you change the resource status to *Requested,* and save the page, the system automatically creates a PeopleSoft Resource Management assignment or allocation and changes the resource status to *Committed* for named resources and *Allocated* for generic resources.
Allocated	This status applies only to generic resources. If you enable generic resource approvals, the resource status changes to *Allocated* when the pool manager approves the request from the project manager for a generic request. If you do not require generic resource approvals, the system automatically changes the status from *Requested* to *Allocated* when you save the page.

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Resource Status	*Usage*
Committed	This status applies only to named resources. If approval is not required, when a named resource status is changed to *Requested,* for PeopleSoft Resource Management-managed resources, the system automatically creates a PeopleSoft Resource Management assignment and changes the resource status to *Committed.* If approval is required, the system automatically changes the resource status to *Committed* when the named resource on the Resources page is approved and a PeopleSoft Resource Management assignment is created. If a named resource is added to the Resources page using the integration with Microsoft Project and approval workflow is disabled, the system automatically assigns a resource status of *Committed.* A generic resource's status cannot be *Committed.* A generic resource must be replaced by a named resource before the system can create a PeopleSoft Resource Management assignment and change the resource status to *Committed,* based on approval workflow.
Cancelled	You must manually change the status to *Cancelled* unless you cancel all of the resource's assignment schedules. If you cancel all of the resource's assignment schedules, the system automatically updates the resource status to *Cancelled.* This list describes the action that the system performs if you cancel an assignment on the Resources page: • If the assignment schedule is in the past, the system performs no further action. • If the assignment has an ongoing assignment schedule, the PeopleSoft Resource Management assignment status changes to *Cancelled* as of the date of cancellation. **Note.** The system does not remove the assignment schedule dates from the Resources page, because they can provide the project manager with historical information about the project assignment for that resource. • If the assignment has a future assignment schedule, the PeopleSoft Resource Management assignment is cancelled.
Rejected	The system automatically changes the resource status to *Rejected* when an: 1. Assignment is rejected for a named resource. 2. Allocation is rejected for a generic resource.

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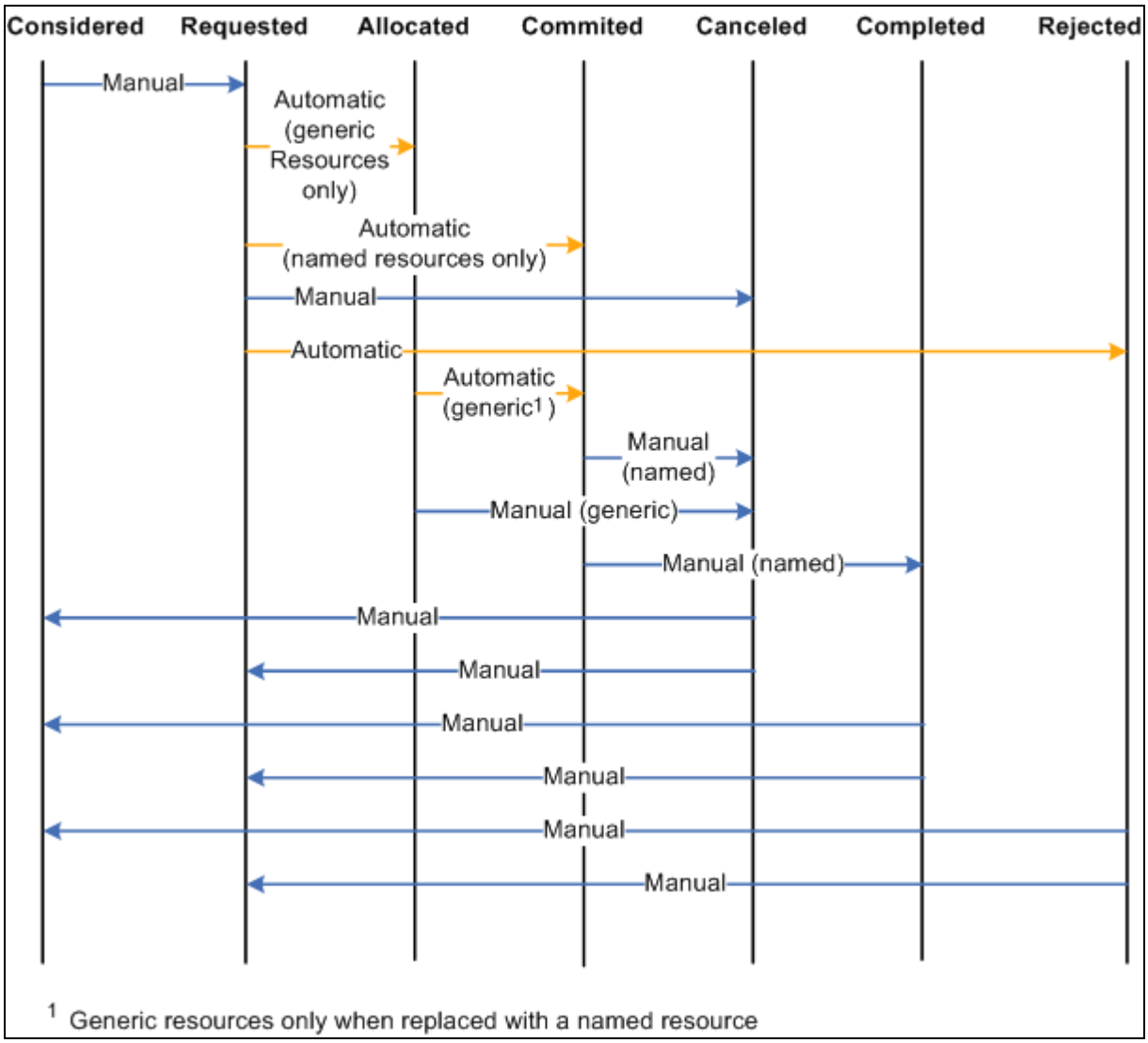
Resource Status	Usage
Completed	This status applies only to named resources who are in a *Committed* status. You can manually change the resource status from *Committed* to *Completed.* You can complete assignments with assignment schedules that are in the past, ongoing, or in the future. The system automatically changes the resource status on the Resources page to *Completed* if the resource status on all of the resource's assignment schedules for this project is *Completed.*

This diagram illustrates the permitted resource status values that you can update on the Resources and Resource Detail pages. In this diagram, Manual indicates that you select the new status in the Resource Status field on the Resources page and Automatic indicates that system processing automatically updates the status. The permitted status changes apply to both named and generic resources unless otherwise noted.



Resource status values

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Resource Scheduling Options

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

- Create project resources, and then assign them to activities.
- Add resources directly to activities, and let the system automatically assign them to the project as project resources.
- Create the resources in Microsoft Project, 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 automatically updates several dates and triggers conflict warnings. If you use the third option, all of the dates load automatically into the fields of the Resources, Resource Detail, and Resources by Activity pages.

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 affects 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 appears if the assignment schedule date range is reduced in such a way that a resource is working on an activity that has dates that are 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 is not yet established on the Resources page, the system adds the resource and sets the planned start and end dates to be equal to the activity start and end dates, respectively, for the first activity to which the resource is added. If the resource is already established on the Resources page and the change on the Resources by Activity page extends a date so that it is outside the range of the resource's date on the Resources page, the system issues a warning. This warning indicates that the resource's activity dates fall outside the dates that are shown for the resource on the Resources page.

Resource Assignments

If you use PeopleSoft Resource Management, you should use PeopleSoft Program Management as the primary tool to manage assignments and resources. PeopleSoft Program Management uses a project calendar that accounts for holidays when calculating duration and work effort. Because of this, the resource assignment schedule should accurately reflect the project calendar.

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Named Resources and Generic Resources

Named resources are resources that have an employee ID associated with them. Generic resources are resources that do not have an employee ID associated with them. Generic resources serve as role-oriented placeholder descriptions for resources during the project planning phase. Typically, in the planning stage, project managers use generic resources instead of named resources. After the project is approved, project managers create resource requests and replace generic resources with the specific available resources.

Use the Resources page or Resource Detail page to add one or more generic resources to a project. You can update generic resource qualifications for specific generic resources on the Update Generic Resource Qualifications page for use as search criteria to fulfill generic resource requests.

To replace a generic resource with a named resource, perform one of the following actions:

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

  After 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.

  When an actual named resource is found and an assignment is created for the resource request 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.

- Access the Resources page, and generate a generic resource request by selecting *Requested* for the resource status.

  The PeopleSoft Resource Management pool manager receives the generic resource request and, if it is approved, can assign a named resource to the request.

Note. This is for users who use resource pools and do not make use of service orders to request resources for projects.

See *PeopleSoft Resource Management 9.1 PeopleBook*, "Fulfilling Generic Resource Requests."

Generic Resource Qualifications

When you add generic labor resources to a project, you can capture specific attributes about that resource so that when it is time to find a named resource to fill that role, the appropriate resource is matched to fill the need. The system uses predefined qualifications that are set up in a qualification profile that is associated with the project role by default. You can use the Update Generic Resource Qualifications page to edit the qualifications to match the role that you need to fill. The system then uses the specific generic resource qualifications to populate the Express Search page, generic resource requests, or service order resource requests (if accessed from the Manage Generic Resources page). This is an example process flow showing how you can capture generic resource qualifications and use them to search for named resources:

1. During the process of planning the project, enter the generic labor resource requirements on the Resources page for the project.

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2. Click the Generic Resource Qualifications icon in the Associated Resources grid for the generic resource to access the Update Generic Resource Qualifications page.

   The Generic Resource Qualifications icon appears only for rows that contain generic labor resources.

3. On the Update Generic Resource Qualifications page, view and edit the resource qualifications that are needed to fulfill the primary project role for each generic resource.

   The default qualifications are based on the qualification profile of the resource's primary project role.

   Any user with security to access the Resources page can access and edit the Update Generic Resource Qualifications page.

   The Update Generic Resource Qualifications page acts in the same manner as the resource request section of the service order. You can add or modify qualifications, and add keywords or notes.

4. Save the Resources page to commit the changes to the database.

   The system stores a list of qualifications with the generic resource.

5. Change the status of the generic resources to *Requested* to request that these generic resources be filled with named resources that match the specified qualifications.

   Changing the generic resource to a *Requested* status in PeopleSoft Program Management triggers the system to send a generic resource request to the Pool Manager Workbench in PeopleSoft Resource Management.

6. The system sends a generic resource request to the Pool Manager Workbench with a status of *Pending* or *Allocated* based on the PeopleSoft Resource Management business unit options.

7. The pool manager can either fulfill the generic resource request with a named resource or allocate capacity.

Resource Conflicts

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

- In the Assignment Schedule grid on the Resource Detail page, a resource is associated with an activity on the project that has dates that are outside of the date ranges that are 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 the percent that is specified in the Assignment Schedule grid on the Resource Detail page.
- Activity assignment units on the Resources by Activity page are greater than the assignment schedule units on the Resource Detail page.
- On the Resource Detail page, the resource's units for any activity exceed the units on the assignment schedule.

You can view the specific activities that are causing the conflict on the Resource Detail page in the Activity List grid. A conflict warning indicator appears next to the activities that are causing the conflict.

You can move your mouse cursor over the conflict warning indicator to display text that indicates the nature of the conflict. To resolve scheduling conflicts, perform one of the following actions:

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- Extend the resource's assignment end date on the Resource Detail page.
- Reduce the resource's units on the Resources by Activity page.
- Increase the units for the resource on the project assignments

Part-Time Assignments

Part-time assignments are determined by the Units field on the Resource Detail page. You can enter the time percentage, based on the project calendar, that the resource is allocated to the schedule. If the value is less than *100* percent, the assignment is a part-time assignment.

The default Units value on the Resources by Activity page is:

- The units percent value for that schedule in the Assignment Schedule grid on the Resource Detail page.
- The lowest units percent value of the assignment schedules for activities that span multiple assignment schedules.

The default units percent value on the Assignment Schedule grid in the Resource Detail page is *100* percent.

The units percent value on the Manage Generic Resources page is:

- The units percent value for that schedule in the Assignment Schedule grid on the Resource Detail page.
- The lowest units percent value of the schedule rows if an assignment schedule spans multiple date ranges.

The Units field is not editable on the Manage Generic Resources page.

If the resource's schedule is managed in PeopleSoft Resource Management, a resource assignment for the specified number of hours and date range is created in PeopleSoft Resource Management. If you modify the Units field on the Resource Detail page, the system triggers approval workflow if assignment schedule date change workflow is activated for the business unit in PeopleSoft Resource Management.

A conflict visual indicator appears when activity assignment units on the Resources by Activity page are greater than the assignment schedule units on the Resource Detail page. You can move your mouse cursor over the indicator where the nature of the conflict appears.

You can create direct, part-time assignments using PeopleSoft Program Management or PeopleSoft Resource Management. If you create part-time assignments using PeopleSoft Program Management, the start time for the resource assignment is based on the Resource Management Installation record (INSTALLATION_RS). Other schedule details on the assignment in PeopleSoft Resource Management, such as hours per day and scheduled work days per week, are based on the project calendar in PeopleSoft Program Management.

The system modifies the Assign Resource page (RS_ASSIGN_MAIN) in PeopleSoft Resource Management if PeopleSoft Program Management is installed. You can select the Project or Resource assignment calendar. The Schedule Details group box on the Assign Resource page is based on the calendar selection in the following ways:

- Project calendar: The system bases the default assignment hours on project hours per day. The system bases the default assignment work days per week on the project calendar. Project hours per day and project calendar are specified on the Program Management Defaults page.

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- Resource calendar: The system bases the default assignment hours on the resource's job information and stores them in the Standard Hours field (STD_HOURS) in the Job record (JOB). The system bases the default work days per week for assignments on the resource profile and stores them in the Standard Days field (STD_DAYS) in the Worker Table record (RS_WORKER_TBL).

If you create part-time assignments using PeopleSoft Resource Management, the units percent value on the project in PeopleSoft Program Management is based on the project calendar, even if the assignment in PeopleSoft Resource Management uses the resource calendar. For example, if the assignment is for four hours a day, and the Program Management Defaults page specifies ten hours a day for the project, the units value is calculated as 4 ÷ 10 = 40%.

Express searching for resources does evaluate part-time resource requirements. Express search results are based on the number of hours per day that are specified on the Express Search page.

Activity Resource Workflow

If you select the Enable Activity Resource Workflow option on the Installation Options - Program Management page, project managers can click the Notify Activity Resources button on the Resources page to trigger the workflow. The workflow sends email notifications and worklist items to resources with a resource class of *Labor* on the project team who are assigned to activities. Resources with multiple activity assignments receive one email containing a list of their assignments.

The Notified column in the Resources grid on the Resources by Activity page and in the Activity List on the Resource Detail page indicates whether the resource has been notified of an activity assignment. If project managers change assignments, they can select to either notify all resources of all assignments or notify only the resources that have new activity assignments.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Program Management Installation Options.

Microsoft Project Resources

These options on the Microsoft Project Integration Options page control how resources are added to the project team during the integration with Microsoft Project:

- *Assign Named Resource*

  If a named resource that is imported from Microsoft Project does not match an employee from the Personal Data table (PERSONAL_DATA), the system adds the resource to the Resources page as a generic resource.

  If a named resource that is imported from Microsoft Project does exist as a PeopleSoft Resource Management resource (in the Resource Management Eligible Worker table (RS_ELGBL_WRKR)), the PeopleSoft Resource Management values for resource pool, region, personnel status, and primary project role populate the Resources page for the resource.

  If assignment approval workflow is enabled and you select this option, the system adds the resource with a status of *Requested*, which triggers the process to create a PeopleSoft Resource Management assignment. If assignment workflow is not enabled and you select this option, the system sets the resource status to *Committed.*

  If you do not select this option, the system adds the resource with a status of *Considered.*

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- *Allocate Generic Resource*

  If the resource pool, also known as a group in Microsoft Project, of a generic resource that is imported from Microsoft Project does not match a resource pool in PeopleSoft Resource Management, the system adds the generic resource with a resource pool value of *Unassigned.* The Microsoft Project values are imported for resource name, region, and personnel status.

  If generic resource workflow is enabled and you select this option, the system adds the resource with a status of *Requested.* If generic resource workflow is not enabled, the system adds the resource with a status of *Allocated.*

  If you do not select this option, the system adds the resource with a status of *Considered.*

- *Allow OverBooking*

  If you select this option, the system assigns a resource status of *Requested* when you import named resources from Microsoft Project, and creates PeopleSoft Resource Management assignments regardless of schedule conflicts. If you do not select this option, the system assigns a resource status of *Considered* on the Resources page if resource schedule conflicts occur.

  This option applies only if you select the Assign Named Resources option.

- *Default Region*

  This option applies only to generic resources that are imported from Microsoft Project. You can select a default region from which to request generic resources. The default region field value populates the region field on the Resources page for new resources. The value does not update the region for existing resources.

The system does not re-create PeopleSoft Resource Management assignments or allocations that are already requested if you subsequently import the same project from Microsoft Project. However, in subsequent imports, if schedule changes occur for any resources that have existing assignments or allocations, the system will make the appropriate changes.

When data transfers from a PeopleSoft system to Microsoft Project, the Units field value from the assignment schedule on the Program Management Resource Detail page appears in Microsoft Projects in the Resource Availability grid on the Microsoft Project Resource Information page.

When data transfers from Microsoft Project to the PeopleSoft system, appropriate values from the Units field in the Resource Availability grid on the Microsoft Project Resource Information page appear in the assignment schedule on the Resource Detail page.

Resources or assignments that you delete from Microsoft Project are not automatically deleted in the PeopleSoft system during the next import process. Assignments must be manually deleted from the PeopleSoft system. Additionally, resources or assignments that you delete from the PeopleSoft system are not automatically deleted in Microsoft Project during the next export process.

If you import a generic resource from Microsoft Project, and reimport that generic resource with a different project role from what is established in the PeopleSoft system, the system writes a warning to the Microsoft Project integration log stating that the project role for the generic resource has changed and the associated qualifications for that resource have been updated with the qualifications that are associated with the new primary project role.

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See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Integrating with Microsoft Project," Understanding Integration of PeopleSoft Project Costing with Microsoft Project

Adding and Modifying Project Resources

This section discusses how to:

- Define project resources.
- Add resources from projects.
- Work with resource details.
- Specify generic resource qualifications.
- Manage generic resources.

Pages Used to Add and Modify Project Resources

Page Name	*Definition Name*	*Navigation*	*Usage*
Resources	PC_PRL	Program Management, Project Definitions, Resources, Resources	Define project resources and related cost data to build project estimates and project teams.
Express Search	RS_EXPRESS_SEARCH	Click the button next to generic resources in the Search column on the Resources page.	Identify qualified candidates as project resources. The Express Search page is a part of PeopleSoft Resource Management. See *PeopleSoft Resource Management 9.1 PeopleBook*, "Express Searching for Resources," Express Searching.
Resource Detail	PC_PRL_SCHED	Click a resource name in the Associated Resources grid 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.

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Page Name	Definition Name	Navigation	Usage
Assign Resources from Project	PROJ_TEAM_COPY	Program Management, Activity Definitions, Resources, Resources by Activity Click the Add Resource from Project button.	Copy resources from the project to an activity.
Update Generic Resource Qualifications	PGM_GEN_RSRC_QUAL	Program Management, Project Definitions, Resources Click the Generic Resource Qualification icon.	View and edit default qualifications from qualification profiles for use as search criteria to fulfill generic resource requests.
Resource Qualifications - Select Qualification Profile	RS_SELQUALPROFILE	Click the Profile button on the Update Generic Resource Qualifications page.	Select qualification profiles to add predefined qualifications to generic resources. See *PeopleSoft Resource Management 9.1 PeopleBook*, "Express Searching for Resources," Express Searching.
Resource Qualifications - Search for Qualifications	RS_QUALIF_SRCH	Click the List button on the Update Generic Resource Qualifications page.	Search for and add qualifications to the generic resource qualifications. See *PeopleSoft Resource Management 9.1 PeopleBook*, "Express Searching for Resources," Express Searching.
Resource Qualifications - Select Competencies	PGM_PRL_COMP	Click the Competency Tree button on the Update Generic Resource Qualifications page.	Search for and add competencies to the generic resource qualifications. See *PeopleSoft Resource Management 9.1 PeopleBook*, "Express Searching for Resources," Express Searching.
Qualification Detail: <Qualification>	PGM_QUAL_DETAIL	Click the Details link in the Qualifications grid on the Update Generic Resource Qualifications page.	Specify additional details about requested license, language, or single-value flexible attributes. See *PeopleSoft Resource Management 9.1 PeopleBook*, "Express Searching for Resources," Express Searching.

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Page Name	Definition Name	Navigation	Usage
Manage Generic Resources	PGM_GENRES_01	• Program Management, Project Definitions, Manage Generic Resources • Program Management, Project Definitions, Resources Click the Manage Generic Resources link.	View all generic resources that are associated with a project and generate service orders to find named resources to replace the generic resources with named resources.
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.
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.
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.
Activity Team Assignment	PC_TEAM_ACT_SELECT	Click the Add Resource to Activity button on the Resource Detail page.	Add a resource to one or more activities.

Defining Project Resources

Access the Resources page (Program Management, Project Definitions, Resources, Resources).

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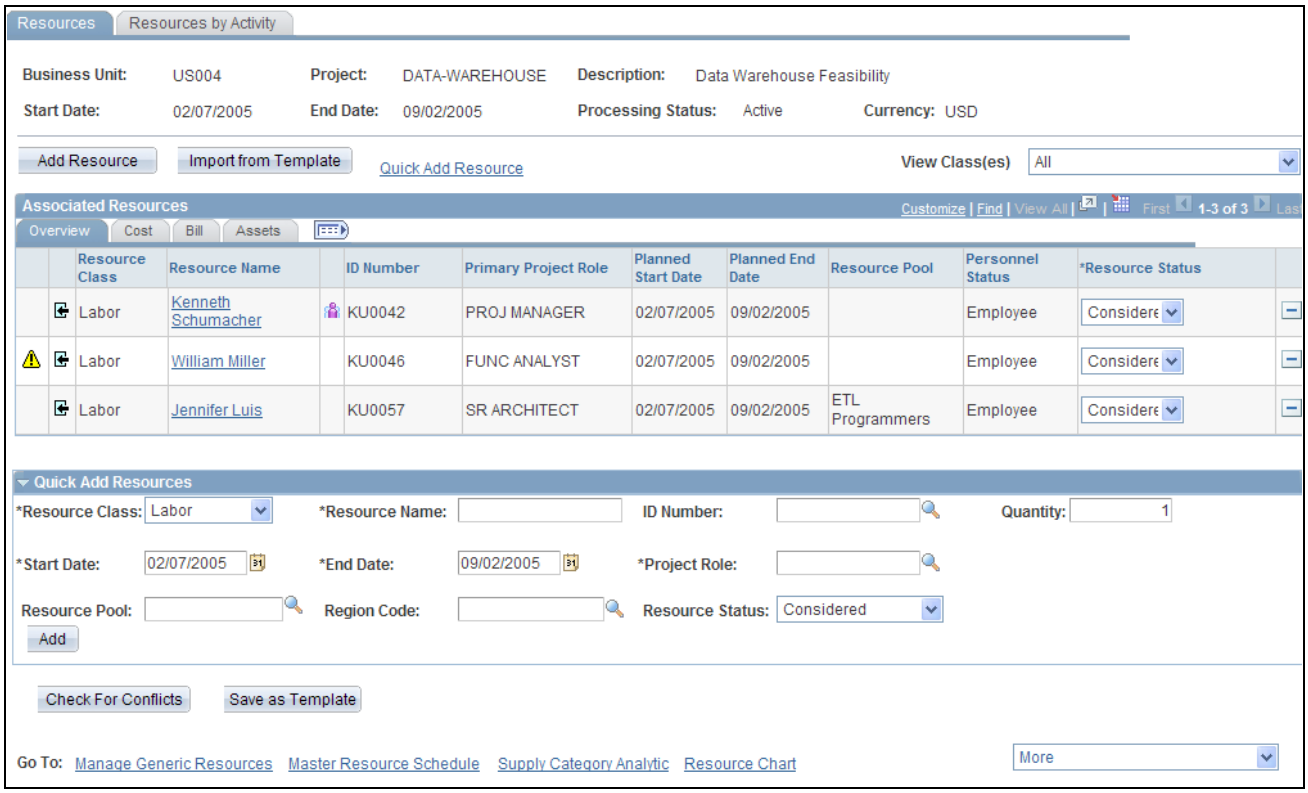

Resources page

You can add new resources to the Resources page in three ways:

- Add Resources button.

  Accesses the Resource Detail page.

- Import from Template button.

  Enables you to import a project team from an existing project template.

- Quick Add Resource link and group box.

  The link navigates to the Quick Add Resource group box at the bottom of the page.

All fields in the Associated Resources grid are display-only, except for Resource Status. You can delete rows from this grid, but you cannot directly add rows to the grid.

Add Resource Click to navigate to the Resource Detail page, where you can select a resource to add to this project.

Import from Template Click to navigate to the Import from Template page, where you can select a project template to copy the resources from the template to this project.

Quick Add Resource Click to go to the Quick Add Resource group box.

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

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Associated Resources - Overview Tab

Indicates that a scheduling conflict exists. This conflict warning indicator appears next to each resource that the system determines has a schedule conflict. Move your mouse cursor over the indicator to view a message that indicates the nature of the conflict.

Indicates that a resource is assigned to an activity on this project. The Activity Indicator icon appears next to each resource that is assigned to an activity on this project.

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 and 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 nonhuman 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.

Other: Any other type of resource that a project manager might want to track on the project that is not a labor, material, or asset resource.

Resource Name

Displays the name of the resource as a link to the Resource Detail page on which you can view scheduling and assignment data for the resource.

Indicates that the resource is the project manager. This icon appears only if the project manager assignment is current as of today's date or the project manager assignment starts on the same date as a future dated project.

ID Number

Displays a unique identifier for the resource based on the resource class:

- Labor resource class displays the employee ID.
- Asset resource class displays the asset ID.
- Material resource class displays the item ID.
- Other resource class displays nothing.

Generic appears in this field for all generic labor, asset, and material resources.

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	Click to access the Express Search page in PeopleSoft Resource Management, where you can identify qualified candidates for the project. This icon appears only for generic labor resources. However, the icon does not appear if: A service order already exists for the generic resource. The generic resource's resource status is *Allocated.* See *PeopleSoft Resource Management 9.1 PeopleBook*, "Express Searching for Resources."
Quantity	Displays the number of items that are needed for this project. This field appears only for material resource items that are added to one or more activities with a units value greater than zero.
Primary Project Role	Displays the associated job function for the resource. This field appears only for labor resources.
Planned Start Date	Displays 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 that are defined for the resource.
Planned End Date	Displays 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 that are defined for the resource.
	Indicates that a resource has multiple assignments for the project. Click the Resource Name link to view scheduling and assignment elements for the resource.
Resource Pool	Displays the resource pool to which the resource belongs. This fields appears only if you use PeopleSoft Resource Management.
Personnel Status	Displays the personnel status for labor resources. This field appears only if you use PeopleSoft Resource Management and a named resource appears in the grid.
	Indicates that a resource is in an inactive resource pool. This icon appears next to each generic resource that belongs to an inactive resource pool. This icon appears only if you use PeopleSoft Resource Management.
Resource Status	Select the resource status. This field appears only if you use PeopleSoft Resource Management and the resource is a labor resource. If a resource request or service order exists for a given resource, the system sets this field to *Requested* and the field becomes display-only. See Chapter 10, "Scheduling and Managing Resources," Understanding Resource Tools, page 143.

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Click to access the Update Generic Resource Qualifications page, where you can view and edit default qualifications from qualification profiles for use as search criteria to fulfill generic resource requests.

Associated Resources - Cost Tab

Unit of Measure Displays the unit of measure by which the resource's cost and bill rates are quoted. For labor resources, hours or days are the only valid units of measure. Assets and material resources typically use *Each* as the unit of measure.

Region Displays the resource's region. This field appears only if you use PeopleSoft Resource Management.

Job Code Displays the resource's job code. This field appears only for named labor resources.

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

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

Currency Displays the currency in which the resource's cost rate is quoted.

Cost Budget Item Displays the cost budget item for the resource.

Associated Resources - Bill Tab

Revenue Budget Item Displays the revenue budget item that the system supplies by default from the Program Management Options page.

Associated Resources - Assets Tab

Asset Type Displays the asset type for the asset resources. This field is blank for all labor, material, and other resource classes.

Asset Subtype Displays the asset subtype for the asset resources. This field is blank for all labor, material, and other resource classes.

Manufacturer ID Displays the manufacturer ID for the asset resources. This field is blank for all labor, material, and other resource classes.

Model Displays the model for the asset resources. This field is blank for all labor, material, and other resource classes.

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Quick Add Resources

Resource Class

Select the resource class from these options:

- *Asset*
- *Labor*
- *Material*
- *Other*

Resource Name

Enter the resource name. For named labor resources, assets, and materials, the system populates this field automatically after you enter the ID number. For generic resources, enter a description of the resource in this field and leave the ID Number field blank.

ID Number

Enter the ID number. You do not need to enter an ID number for the *Other* resource class or generic resources.

Quantity

Enter the number of resources to add to the Associated Resources grid. This field is available only for generic labor and asset resources.

If the value of the Quantity field is greater than *1,* the system appends a sequential number to the resource name. For example, if you enter *Engineer* for the resource name and *3*for the quantity, the system adds three rows with the resource names *Engineer1,Engineer2,* and *Engineer3.* If resources with the name *Engineer* already exist on the project team, the system increments numbers starting with the highest number. If you add 2 more Engineer resources, the system names the resources *Engineer4* and *Engineer5.*

If the resource name ends in a numeric value, the system removes the number before it applies the algorithm to assign a sequential suffix to the resource name. For example, you enter a resource name of *Engineer1* and a quantity of *2.* The system creates resources with *Engineer1* and *Engineer2* resource names. If you want to maintain the number at the end of the resource name, you can insert another character after the number, such as a hyphen. For example, you enter a resource name of *Engineer1-* with a quantity of *2.* The system then creates resources with *Engineer1–1* and *Engineer1–2* as the resource names.

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Asset Type

Enter the asset type from these options:

- *Hardware*
- *Software*
- *Equipment*
- *Property*
- *Fleet*
- *Machinery*
- *Furniture*
- *Facility*
- *Intangible*
- *Other*

For named assets, the system populates this field with the associated asset type. This field appears only for asset resource classes.

Asset Subtype

Enter the asset subtype. The system prompts from the PeopleSoft Asset Management Subtype table (AM_SUBTYPE) based on the value in the Asset Type field. You must select an asset type before selecting an asset subtype. For named assets, the system populates this field with the associated asset subtype. This field appears only for asset resource classes.

Manufacturer ID

Enter the manufacturer ID. The systems prompts from the Purchasing Manufacturing table (MANUFACTURING). For named assets, the system populates this field with the associated manufacturer ID. This field appears only for asset resource classes.

Start Date and **End Date**

Enter the start date and end date. The system populates the start and end dates with the project start and end date by default. The dates must meet these conditions:

- The dates must be equal to or later than the project start date.
- The dates must be equal to or earlier than the project end date.
- The end date must occur on or after the start date.

Note. You can enter only one assignment schedule using this group box. Use the Resource Detail page to add more assignment schedules.

Model

Enter the model. The system prompts from the Maintenance Management Model table (MFG_MODEL). You must select a manufacturer ID before you can select a model. For named assets, the system populates this field with the associated model. This field appears for only asset resource classes.

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Project Role Enter the project role for labor resources.

Resource Pool Enter the resource pool for labor resources. You can edit this field for generic resources only. For named PeopleSoft Resource Management-managed resources, the system populates this field with the resource pool to which the resource is assigned. If you do not specify a resource pool for a generic resource, the system sets the value to *Unassigned Pool.*

Region Code Enter the region code for generic labor resources. For named PeopleSoft Resource Management-managed labor resources, the system populates this field with the region to which the resource is assigned.

Resource Status Select *Considered* or *Requested.* This field applies only to the labor resource class. The default value is *Considered.*

Add Click to add the resource to the Associated Resources grid. The system resets the field in the group box. If you add multiple generic labor or asset resources, when you click the Add button, the system adds the number of rows from the quantity field to the Associated Resources grid. For example, if the value in the Quantity field is *5,* the system adds 5 new rows.

Resources - Buttons

Check for Conflicts Click to determine whether any resource on the project is over-scheduled 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 and PeopleSoft Program Management, a conflict that you create in Microsoft Project 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 Microsoft Project and integrating the data with PeopleSoft Program Management, you should always click the Check for Conflicts button on the Resources page after you upload data from these other products.

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Notify Activity Resources Click to notify resources of activity assignments. The system sends an email notification to all labor employee resources with activity assignments that list the assignments. This button appears only if activity resource workflow is activated at the installation level.

Note. If you create more assignments or make changes to existing assignments, you can click the Notify Activity Resources button again and the system enables you to notify all resources again or notify just the resources with new assignments.

Save as Template Click to access the Save as Template page, where you can specify a template name and create a project template that will save, as part of the template, the project team that includes assets, labor, material, and other resource classes.

Resources - Links

Manage Generic Resources Click 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 is made toward filling the resource requests for generic resource placeholders on a project with a PeopleSoft Resource Management-managed labor resource.

Master Resource Schedule Click to access the Master Resource Schedule page, where you can view work and activity details for named and generic resources that are on this project.

See Chapter 10, "Scheduling and Managing Resources," Viewing Master Resource Schedules, page 204.

Supply Category Analytic Click to access the Supply Category Analytic Select Resource Pools page, where you can select resource pools for the Display Supply Category Analytic Data page.

See *PeopleSoft Resource Management 9.1 PeopleBook*, "Managing Resource Utilization," Defining Supply Category Analytics.

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

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

See Chapter 10, "Scheduling and Managing Resources," Viewing Project Estimates, page 189.

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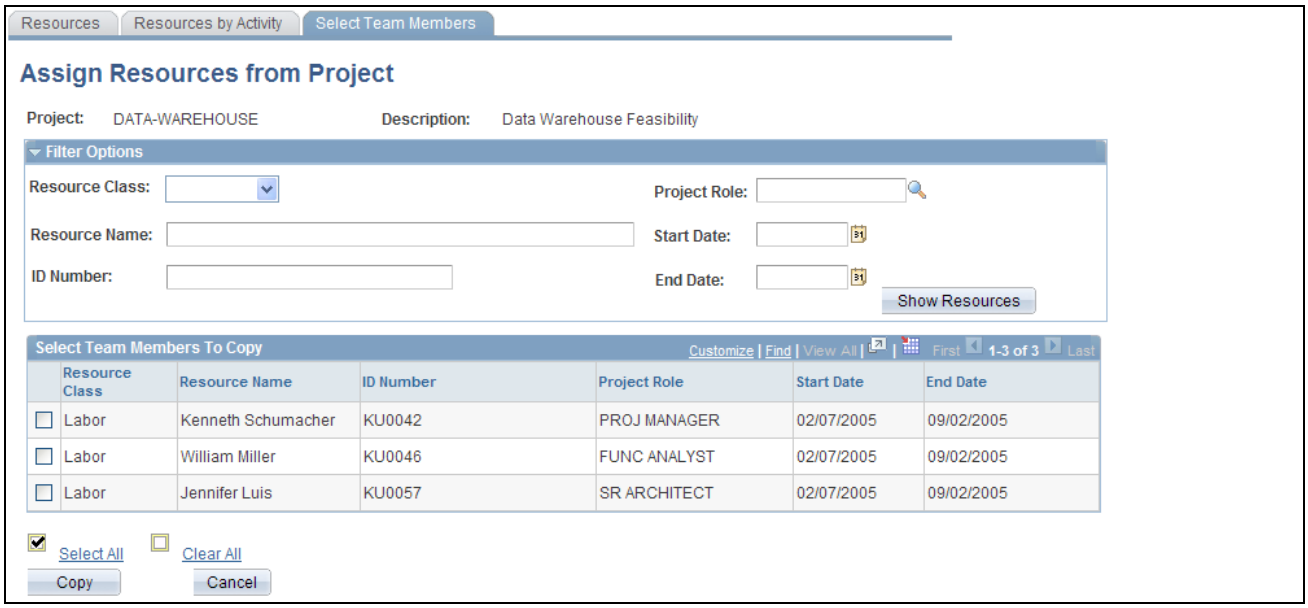
Project Resource Pools Click to access the Project Resource Pools page, where you can view a list of the resource pools that are associated with this project or add resource pools to this project to enforce resource pool security.

See Chapter 7, "Managing Programs and Projects," Understanding Resource Pool Security, page 77.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Pricing Project Costs."

Adding Resources from Projects

Access the Assign Resources from Project page (click the Add Resource from Project button on the Resources by Activity page).



Assign Resources from Project page

Filter Options

When you first access this page, all eligible resources appear in the Select Team Members to Copy grid. Use the Filter Options collapsible group box to filter on various resource attributes so that you can more easily select project resources to add to an activity.

Resource Class, Resource Name, ID Number, Project Role, Start Date, and **End Date** Enter criteria to narrow the list of team members that appear in the Select Team Members to Copy grid.

Show Resources Click to generate a new list of resources based on the filter criteria. The system generates the list based on all of the criteria that you enter. That is, the system uses *and* between each of the filter options fields rather than *or*.

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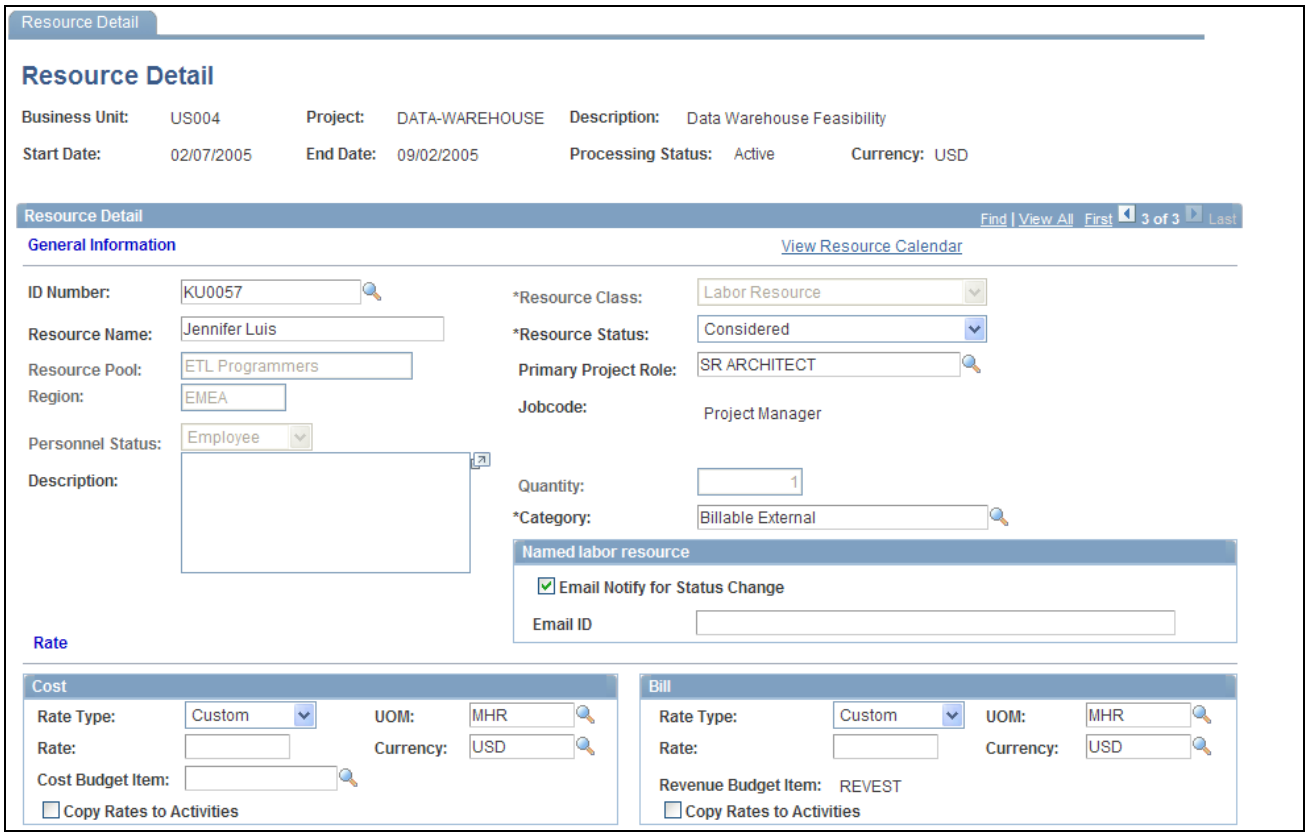
Select Team Members to Copy

Select individual project team members that you want to copy to the activity resources, or click Select All for the system to select all project team members to copy. Click Copy to add the project team members that you selected to the Resources grid on the Resources by Activity page. Save the Resources by Activity page to complete the copy process.

Working with Resource Details

Access the Resource Detail page (click a resource name in the Associated Resources grid on the Resources page).



Resource Detail page (1 of 2)

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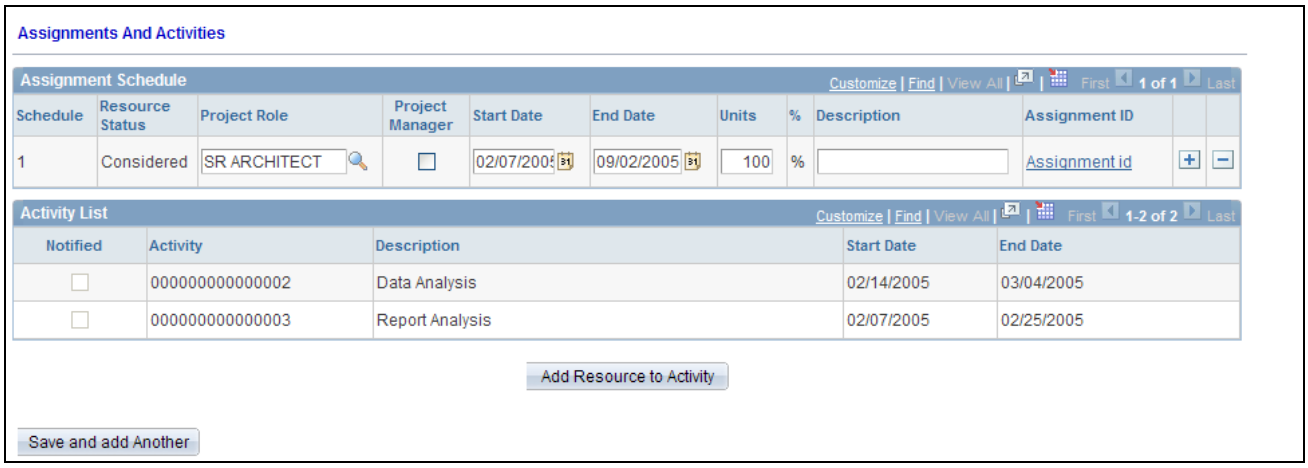

Resource Detail page (2 of 2)

Resource Detail

View Resource Calendar

Click to access the Monthly Schedule page in PeopleSoft Resource Management, where you can view the named resource's assignments and appointments for the month. This is available only for PeopleSoft Resource Management-managed resources.

See *PeopleSoft Resource Management 9.1 PeopleBook*, "Maintaining Resource Schedules," Viewing or Modifying Resource Schedules.

ID Number

Enter the unique identifier for a known resource.

The system automatically populates the this field with *Generic*. Do not change this value if the resource that you are adding is not recognized as a resource with a known ID. If you know the resource that you are adding, select the ID for that resource. The resources that are available to you through the prompt are based on the resource class. You can select from a list of employee IDs for labor resources, item IDs for material resources, and asset IDs for asset resources.

These are the differences between generic resources and named resources:

- Generic resources can serve as placeholders that can be used to request named resources in PeopleSoft Resource Management.
- On the Resources page, generic resources have the Express Search button available. When you click the Express Search button, the system invokes the PeopleSoft Resource Management 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.

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Resource Name

Enter the name of the resource.

The system automatically populates this field for resources for which you select an ID Number.

For generic resources, enter a generic resource name, such as *Technician 1*, *Database Administrator,* or *Computer*.

Resource Pool

Select the resource pool to which the resource belongs. You can edit this field for generic resources, and it is read-only for named resources. If you do not select a resource pool, the system assigns the generic resource to the unassigned pool by default. This field appears only if you use PeopleSoft Resource Management and is valid only for PeopleSoft Resource Management labor resources.

Region

Select the resource's region. You can edit this field for generic resources, and it is display-only for named resources. This field appears only if you use PeopleSoft Resource Management and is valid only for PeopleSoft Resource Management labor resources.

Personnel Status

Select *Employee* or *Non-Employee* to indicate this resource's personnel status. This is applicable only for the labor resource class and only if PeopleSoft Resource Management is installed. You can edit this field for generic resources, but it is read-only for named resources.

Resource Class

Select *Labor Resource,Asset Resource, Material Resource,* or *Other Resource*. The value that you select for this field controls the values that you can enter in the resource information fields. This field is read-only for resources that already exist on the Resources page.

Resource Status

Select *Considered* or *Requested.*This field appears only for labor resources. If you use PeopleSoft Resource Management for generic labor resources and if you set the quantity to a value greater than *1* and set the resource status to *Requested,* when you click Save or Save and Add Another, the system creates a separate generic resource request for each value in the quantity field. For example, if the quantity is *5*, then the system generates five generic resource requests.

Primary Project Role

Select the resource's primary project role. This field appears only for labor resources.

If you change the primary project role for a generic resource, the system deletes the resource's qualifications on the Update Generic Resources Qualifications page and replaces them with the default qualifications from the qualification profile for the new primary project role.

Asset Type

Enter the asset type. For named assets, the system populates this field with the associated asset type. This field appears for only asset resource classes.

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Asset Subtype

Enter the asset subtype. The system prompts from the PeopleSoft Asset Management Subtype table (AM_SUBTYPE) based on the value in the Asset Type field. You must select an asset type before selecting an asset subtype. For named assets, the system populates this field with the associated asset subtype. This field appears only for asset resource classes.

If PeopleSoft Maintenance Management is installed and both the cost and bill rates have zero or no value, the system fetches the cost and bill rates for that asset resource from PeopleSoft Asset Management based on the asset type and subtype. These rates are associated with the *Custom* rate type, and you can modify the values on this page. If PeopleSoft Maintenance Management is not installed, the system uses the default rate value. If a nonzero value exists for cost rate or bill rate and you modify the subtype, the system asks you whether you want the system to update the cost and bill rates based on the asset type and subtype.

Manufacturer ID

Enter the manufacturer ID. The systems prompts from the Purchasing Manufacturing table (MANUFACTURING). For named assets, the system populates this field with the associated manufacturer ID. This field appears only for asset resource classes.

Model

Enter the model. The system prompts from the Maintenance Management Model table (MFG_MODEL). You must select a manufacturer ID before you can select a model. For named assets, the system populates this field with the associated model. This field appears only for asset resource classes.

Category

Enter any category that is specified for assignments on the Task Categories page in PeopleSoft Resource Management. The task category default value is based on the Default Task Category for Assignments field on the Installation Options - Resource Management page. This field appears only if the resource is managed in PeopleSoft Resource Management or is a generic labor resource.

If you change the category value on this page after the resource assignment is created, the system updates the Category field on the existing assignment if the assignment is in a status other than *Cancel* or *Complete.*

See *PeopleSoft Resource Management 9.1 PeopleBook*, "Enabling Resource Schedules," Defining Task Categories and Mapping to TRCs.

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Quantity

For material resources, the system displays the number of items that are needed for this project. This field appears for material resources when the material resource is assigned to one or more activities with a units value that is greater than zero.

For generic labor and asset resources, enter the number of resources to add to the Associated Resources grid on the Resources page. If the value of the Quantity field is greater than *1*, the system appends a sequential number to the resource name. For example, if you enter *Engineer* for the resource name and *3*for the quantity, the system adds three rows with the resource names *Engineer1*,*Engineer2*, and *Engineer3*. If resources with the name *Engineer* already exist on the project team, the system increments numbers starting with the highest number. If the user adds two more Engineer resources, the system names the resources *Engineer4* and *Engineer5*.

Note. After you enter the resource attributes and a quantity, you can click either Save or Save and Add Another to add the resources to the Associated Resources grid on the Resources page and save. Because the system adds the new rows and saves at the same time, if you inadvertently add more resources than you intended, you must delete those resources from the Resources page one at a time.

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 that is specified in the Email ID field. This field is not used by PeopleSoft Program Management to send email notifications of activity status changes.

Email ID

Enter the email address of the individual to notify when the Email Notify for Status Change option is selected.

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Cost

Rate Type

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

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

For named asset resources, you can select *Custom* and specify the cost per unit in the Rate field, or you can leave the field blank. If you leave the field blank, the system uses the rate, UOM, and currency from PeopleSoft Asset Management.

For named material resources, you can have inventoried and noninventoried materials. For inventoried materials, the rate type appears as blank and the system obtains the rate from PeopleSoft Order Management. For noninventoried materials, the only available option is *Custom* and you must specify a value in the Rate field.

For labor resources, the system populates this field with the default that is specified on the Program Management Options page. You can select *Custom* to specify the rate, UOM, and currency or you can select *Proj Role* (project role), *Jobcode*, or *Employee* to obtain the standard rate that the organization establishes for each of these options. If you select any option other than *Custom*, the Rate field becomes view-only and displays the appropriate standard rate. The available rate types are based on the settings in the Rates group box on the Program Management Options page.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22.

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

UOM (Unit of Measure)

Select the unit of measure by which the resource's cost rate is quoted. For labor resources using employee, project role, or job code rate types, hours is the only valid unit of measure. For labor resources using custom rate type, hours or days are the only valid units of measure. You can select any unit of measure for asset, material, and other resource classes.

The UOM must be the same for the bill and cost rates. If the UOM is changed for one rate, the system automatically changes the UOM for the other rate to be the same and will clear out the rate value.

You can edit this field only if both the cost and bill rate types are set to custom. If the rate types are not both custom, the noncustom rate type controls the UOM for both bill and cost.

Rate

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

For asset, material, and other resources, this is the monetary cost per unit. For labor resources, it is the cost per hour or day. For employee, project role, or job code rate types, 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.

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Cost Budget Item Enter a cost budget item for the resource.

Copy Rates to Activities Select to copy the currency, rate, and rate type changes from this page to the Resources by Activities page for each of this resource's activities. The system copies the data when you save.

Note. When you use this page to add resources to a project, the system automatically moves most of the resource data by default 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 by using this page, the system automatically supplies the data for those values when you assign a resource to an activity by using the Resources by Activity page, which enables you to streamline resource deployments.

Bill

Revenue Budget Item Displays the budget classification for the resource. This field is display-only and the system populates it with the value that is specified on the Project Costing Options page.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up Project Business Units," Creating Project Business Units.

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.

If the resource is managed in PeopleSoft Resource Management, 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. The system generates only one assignment ID for a named resource for a project, regardless of the number of assignment schedules. If a resource has a cancelled or completed assignment and another assignment is requested, the new assignment has a new assignment ID and not the one of the cancelled or completed 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 who is asking for approval of the assignment. Assignments that require approval appear in the Schedule Changes Pending Approval grid.

Resource Status Displays the value of the resource status, which is based on the resource status on the Resources page for every resource. If the resource status on the Resource page is either *Requested* or *Committed*, the resource status of a newly added assignment schedule is *Requested.* Otherwise, the status is *Considered.*

Project Manager Select to indicate that this resource is the project manager for the time period that covers the start and end dates.

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Units Enter the time percentage, based on the project calendar, that the resource is allocated to the schedule. The default value is *100.*

Note. If the resource's schedule is managed in PeopleSoft Resource Management, a resource assignment for the specified number of hours and date range is created in PeopleSoft Resource Management. Modifications to the Units field on this page trigger approval workflow if assignment schedule change workflow is activated for the business unit options in PeopleSoft Resource Management.

See *PeopleSoft Resource Management 9.1 PeopleBook*, "Assigning Resources," Creating Assignments.

Schedule Changes Pending Approval

This grid appears only if the project business unit that is associated with the project activates the assignment approval required feature or date change approval required feature in PeopleSoft Resource Management. The grid lists any schedule modifications that are made in the Assignment Schedule grid for assignments with an assigned status that are awaiting resource manager authorization. Until the resource manager approves the assignment, the new or modified schedule rows have 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 might appear more than once. This can occur when more than one Assignment Schedule Detail row exist for the same assignment. None of the date ranges for the assignment schedule 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 that are 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 by using the Resource Detail page that is in PeopleSoft Program Management. However, the only scheduling changes that appear in the Schedule Changes Pending Approval grid are those that you make by using the Resource Detail page. For a complete list of assignments that are pending approval, please refer to the Assign Resources component (RS_ASSIGNMENT) in PeopleSoft Resource Management.

To avoid data conflicts, you should use either PeopleSoft Resource Management or PeopleSoft Program Management to modify assignments, but not both.

See *PeopleSoft Resource Management 9.1 PeopleBook*, "Assigning Resources," Assigning Resources.

Activity List

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

Notified Indicates whether the resource has been notified of an assignment. The check box displays a check mark if notification has been sent. This occurs when you click the Notify Activity Resources button on the Resources page.

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Adding Resources to Activities

Add Resource to Activity Click to access the Activity Team Assignment page, where you can add the resource to one or more activities. This button does not appear if a change request is required for adding resources to activities, the resource is a labor resource, and you are not the current project manager.

Save Options

Save and add Another Click for the system to:

1. Validate the data on the page.
2. Add the resource to the Resources page and save the resource schedules.
3. Reset the contents on the page.

Save Click for the system to:

1. Validate the data on the page.
2. Add the resource to the Resources page and save the resource schedules.
3. Retain the values on the page.

Specifying Generic Resource Qualifications

Access the Update Generic Resource Qualifications page (click the Generic Resource Qualification icon on the Resources page).

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Update Generic Resource Qualifications page

The system supplies the page header fields from the Resources page based on the generic resource that you clicked to access this page. Click Profile, List, and Competency Tree to access the pages on which you can select qualifications for the generic resource. The system uses the qualifications to feed the Express Search and as search criteria to fulfill generic resource requests, unless one of these conditions applies:

- If you modify the qualifications, keywords, or notes on this page after the generic resource request is created, the system does not automatically update the existing generic resource request.
- If you modify the qualifications, keywords, or notes on this page after the service order resource request has been generated, the system does not automatically update the existing request.
- If you modify the qualifications, keywords, or notes on the generic resource request, service order resource request, or Express Search page, the system does not automatically update the qualifications on this page.
- If you modify the primary project role on the Resource Detail page after the generic resource request is created, the system does not automatically update the qualifications on the generic resource request.
- If you change the default qualifications on the project role that is listed as the primary project role for a generic resource on the Resources page, the system does not automatically update this page for the resource.

Qualifications

Importance

Select the importance of having the resource possess the specified qualification.

Desired: The Verity search engine gives preference to resources who possess the qualification but does not exclude resources who do not possess the qualification. This is the default value.

Required: Resources who do not possess this qualification are not returned in the search results.

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Years of Work Experience	Select the number of years of experience that the resource should possess for this competency. You can select from *1 Year* to *9+ Years.* If you select an importance of *Desired* for this competency, the Verity search engine gives preference to resources who possess the specified years of experience but does not exclude resources who do not meet the specified years. If you select an importance of *Required* for this competency, resources who do not meet the specified years of experience are not returned in the search results. This field appears only on rows that contain a qualification type of *Competency.*
Proficiency	Select the appropriate level of competency proficiency that the resource should possess for this project. If you select an importance of *Desired* for this competency, the Verity search engine gives preference to resources with the proficiency level but does not exclude resources who do not meet the specified proficiency. If you select an importance of *Required* for this competency, resources who do not meet the specified proficiency are not returned in the search results. The default value is the highest level of competency available. This field appears only on rows that contain a qualification type of *Competency.*
Details	Click to access the Qualification Detail: <Qualification> page and enter additional information about the qualification. The Details link appears only on rows for licences, languages, and single-value flexible attributes because additional details can be entered about these qualifications.
Profile	Click to access the Resource Qualifications - Select Qualification Profile page, where you can select qualification profiles to add to the Qualifications grid.
List	Click to access the Resource Qualifications - Search for Qualifications page, where you can search for and add qualifications to the Qualifications grid.
Competency Tree	Click to access the Resource Qualifications - Select Competencies page, where you can search for and add qualifications to the Qualifications grid.

Keywords

Use the Keywords tab to enter a word, phrase, or string of words in uppercase or lowercase. Use a comma to separate keywords. You can use logical connectors *AND* or *OR* to separate keywords. A comma acts the same as the *OR* connector. If you use *AND* or *OR* connectors, you can use parentheses to define precedence. When you run the Express Search, the system searches the resource's work experience and resume document attachments for matches.

Note. The keywords and connectors that you enter are not case-sensitive.

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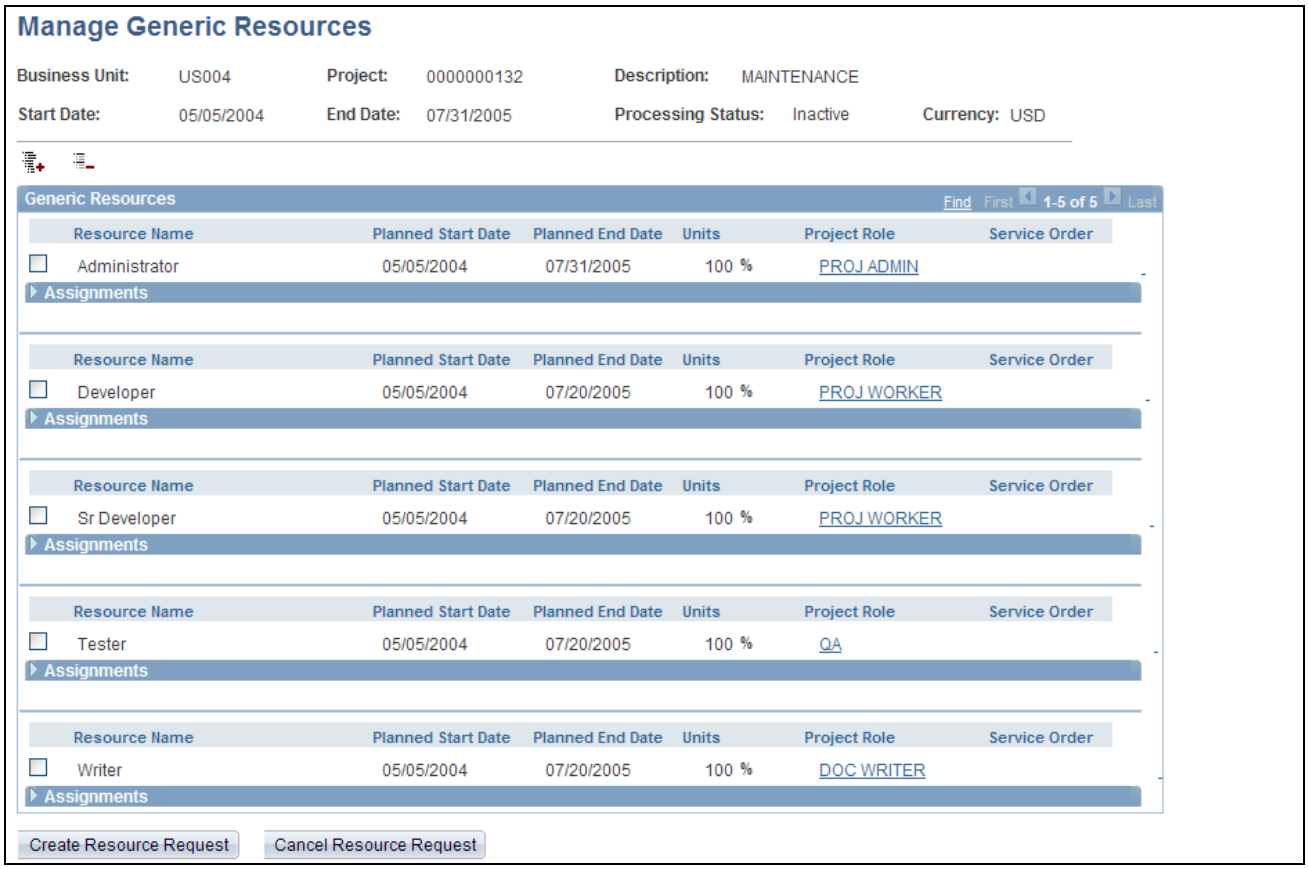
Notes

Use the Notes tab to enter any additional comments or notes for this request.

Managing Generic Resources

Access the Manage Generic Resources page (Program Management, Project Definitions, Manage Generic Resources).



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 that is next to each generic resource for which you want to generate or cancel a service order resource request. The system creates or cancels resource requests for only the selected generic resources. The check box is available only if a service order resource request has not been submitted for the corresponding generic resource.

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

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Create Resource Request Click to create new resource requests for the selected generic resource. Service orders that you originate from the Manage Generic Resources page are created in a *Draft* status. To change the status to *New* and send the service order to the Staffing Workbench - Fulfill Orders page, open the service order and click Save and Submit on the Order Summary page.

Cancel Resource Request Click to cancel any open resource requests that are for the selected generic resource.

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

For any individual project, you should not use both the Resources page and the Manage Generic Resources page to generate resource requests. These two processes for generating generic resource requests support two different business processes. The Resources page supports generating generic resource requests for internal information technology departments and the Manage Generic Resources page supports generating generic resource requests for service-order oriented processes that are used by professional services organizations.

Adding and Modifying Activity Resources

This section discusses how to:

- Define activity resources.
- View project estimates.

Pages Used to Add and Modify Activity Resources

Page Name	*Definition Name*	*Navigation*	*Usage*
Resources by Activity	PC_ARL	Program Management, Activity Definitions, Resources, Resources by Activity	View and edit resources that are assigned to an activity.
Project Estimate Summary	PGM_PROJ_EST_SUMM	Program Management, Project Definitions, Resources, Resources Select Project Estimate Summary from the More drop down box on the Resources page.	View a summary of activities with associated work and cost estimates.

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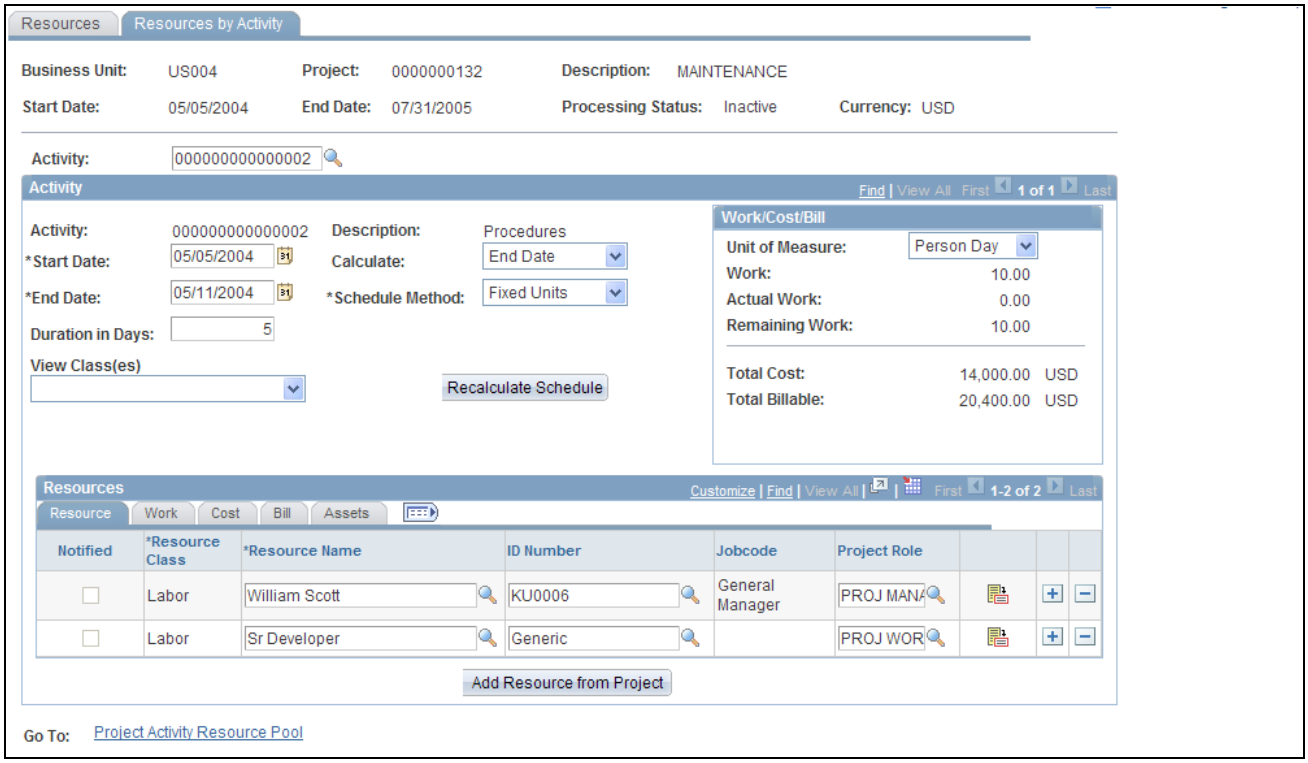
Defining Activity Resources

Access the Resources by Activity page (Program Management, Activity Definitions, Resources, Resources by Activity).



Resources by Activity page

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

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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.

  You should not select this option if you select *Fixed Duration* in the Schedule Method field.

- *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 that you select for each activity depends on what information you already know about that activity. For example, you might 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 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.

This field does not appear if the Activity Date Cascade Calculations option on the Project General - Program Management page is set to *Manual.*

Schedule Method

Designates the method for calculating the variables that are involved in scheduling labor resources to an activity. Variables are 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.

  You should not select this option if you select *Duration* in the Calculate field.

- *Fixed Units:* When a schedule is calculated or recalculated, the variable that remains constant is the number of resource units that are 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

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Labor Adjustment % (labor adjustment percentage) Displays the labor adjustment percentage that the Pricing process uses to calculate new rows for projects that are created from proposals in PeopleSoft Proposal Management if the rate option is *AMN* (Mark Up/Mark Down Labor). This field appears only if the project request originated from PeopleSoft Proposal Management.

Non-Labor Adjustment % (nonlabor adjustment percentage) Displays the nonlabor adjustment percentage that the Pricing process uses to calculate new rows for projects that are created from proposals in PeopleSoft Proposal Management if the rate option is *AML* (Mark Up/Mark Down Nonlabor). This field appears only if the project request originated from PeopleSoft Proposal Management.

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

Work/Cost/Bill

This group box summarizes the data from the Resources grid.

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.*

Work Displays the sum of the work from the Resources grid in the units selected in the Unit of Measure field.

Actual Work Displays the sum of the actual work values from the Resources grid in the units selected in the Unit of Measure field.

Remaining Work Displays the sum of the remaining work values from the Resources grid in the units selected in the Unit of Measure field.

Total Cost Displays the sum of the cost values from the Resources grid in the units selected in the Unit of Measure field.

Total Billable Displays the sum of the bill amount values from the Resources grid in the units selected in the Unit of Measure field.

Bill Adjustment Displays the amount that the total billable amount is adjusted by based on the percentages in the Labor Adjustment % and Non-Labor Adjustment % fields. This value is calculated as ((Total Billable (for labor resources) × Labor Adjustment %) + (Total Billable (for non-labor resources) × Non-Labor Adjustment %)). This field appears only if the project request originated from PeopleSoft Proposal Management.

Total Bill Adjusted Displays the adjusted billing amount, which is the sum of the values in the Total Billable and Bill Adjustment fields. This field appears only if the project request originated from PeopleSoft Proposal Management.

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

Resources - Resource Tab

Notified

Indicates whether the resource has been notified of an assignment. The check box displays a check mark if notification has been sent. This occurs when you click the Notify Activity Resources button on the Resources page.

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:* Nonhuman resource (for example, a computer is an asset resource).
- *Other:* Any other type of resource (for example, travel).

Resource Name

For asset or material resources, enter the description of an asset or material. For labor resources that are employees, enter the name or employee ID 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 for labor, asset, and material resources. The system automatically populates this field with the employee's ID when it is entered in the Resource Name field.

Project Role

Select the job function that the resource is going 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 using employee, project role, or job code rate types, *MHR* is the only valid unit of measure. For labor resources using custom rate type, *MHR* and *MDY* are the only valid units of measure. Asset and material resources typically use *Each* as the unit of measure, but they can use any available unit of measure that has been defined in the system.

The UOM must be the same for the bill and cost rates. If the UOM is changed for one rate, the system automatically changes the UOM for the other rate to be the same and clears out the rate value.

You can edit this field only if both the cost and bill rate types are set to custom. If the rate types are not both custom, the noncustom rate type controls the UOM for both bill and cost.

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Units

For labor resources, enter the time percentage, based on the project calendar, that the resource is allocated to the schedule.

The default value is:

- The units percent value for that schedule in the Assignment Schedule grid on the Resource Detail page if the resource only has one assignment schedule.
- The lowest units percent value of the assignment schedules if the resource has more than one assignment schedule.

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

Work

Enter the total number of hours or days 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. Determining the duration of the activity based on the UOM.

   When the UOM is *MHR*, the system converts the duration of the activity in days to business hours according to the standard work-hours-per-day setting of the project.

   For custom rate types with an *MDY* UOM, the duration is in days.

2. Obtaining the resource's units, which are 100 percent by default, 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 if the UOM is *MHR* or days if the UOM is *MDY*.

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.

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Actual Work

Displays the number of hours that a resource actually works. This is a display-only field, and is relevant only to labor resources. The values that are in this field reflect any actual hours from approved PeopleSoft Expenses time reports.

Note. If you are using the PeopleSoft Program Management integration with Microsoft Project, the actual work figure, which can be entered in Microsoft Project, cannot be uploaded to the PeopleSoft system.

Note. To verify that the Actual Work values are current, you should run the Expenses to Project Costing Application Engine process (PC_EX_TO_PC) as often as you require time reports to be submitted. For example, if you require time reports to be submitted each week, you should run the Expenses to Project Costing Application Engine process each week.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Integrating with PeopleSoft Expenses," Stage Time and Expense Reports.

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 resources and the new resource, and sets the new resource's work value to be equal to its remaining work value.

Baseline Work

Enter the number of hours or days that you expect the activity to require. As the project progresses, you can compare this to the actual work to determine the accuracy of the original baseline estimate.

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Resources - Cost Tab

Rate Type

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

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

For named asset and material resources, you can select *Custom* and specify the cost per unit in the Rate field, or you can leave the field blank. If you the leave the field blank, the system uses the rate, UOM, and currency from PeopleSoft Asset Management for asset resources or from PeopleSoft Order Management for material resources.

For labor resources, you can select *Custom* to specify the rate, or you can select either *Proj Role* (project role), *Jobcode,* or *Employee* to obtain the standard rate that the organization establishes for each of these options. If you select any option other than *Custom,* the Rate field becomes view-only and displays the appropriate standard rate. The available rate types are based on the settings in the Rates group box on the Program Management Options page.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22.

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 or day.

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 that are related to this resource are charged.

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

Cost

Displays the cost of the resource based upon other data that is 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 or days that are specified in the Work field.

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Resources - Bill Tab

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

For generic asset and material resources, the only valid value is *Custom*, and you must specify the bill amount per unit in the Rate field.

For named asset and material resources, you can select *Custom* and specify the bill amount per unit in the Rate field, or you can leave the field blank. If you the leave the field blank, the system uses the rate, UOM, and currency from PeopleSoft Asset Management for asset resources or from PeopleSoft Order Management for material resources.

For labor resources, you can select *Custom* to specify the rate, or you can select either *Proj Role* (project role), *Jobcode*, or *Employee* to obtain the standard rate that the organization establishes for each of these options. If you select any option other than *Custom*, the Rate field becomes view-only and displays the appropriate standard rate. The available rate types are based on the settings in the Rates group box on the Program Management Options page.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22.

Rate The bill rate per unit that is applied to determine the total billable amount of the resource.

For asset and material resources, this is the monetary bill amount per unit. For labor resources, it is the bill amount per hour or day.

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

Bill Amount Displays the bill amount of the resource based upon other data that is entered. For assets and materials, the bill amount is determined by multiplying the rate by the units. For labor resources, the system generates bill amounts by multiplying the rate times the hours or days that are specified in the Work field.

Resources - Assets Tab

This tab appears only if PeopleSoft Maintenance Management is installed.

Asset Type Displays the asset type for the asset resources. This field is blank for all labor, material, and other resource classes.

Asset Subtype Displays the asset subtype for the asset resources. This field is blank for all labor, material, and other resource classes.

Manufacturer ID Displays the manufacturer ID for the asset resources. This field is blank for all labor, material, and other resource classes.

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Model Displays the model for the asset resources. This field is blank for all labor, material, and other resource classes.

Additional Page Elements

Add Resource from Project Click 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.

If a change request is required to add a resource to an activity and you are not the current project manager, you can select from only nonlabor resources on the Assign Resources from Project page. Otherwise, you can select from all resources on the Assign Resources from Project page.

Create Work Order Click to create a work order in PeopleSoft Maintenance Management. The Create Work Order button appears only if you have PeopleSoft Maintenance Management.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Integrating with Maintenance Management," Understanding Integration with PeopleSoft Maintenance Management.

View Work Order Click to access the Work Orders page (PC_LINK_WO), where you can view the work orders that have been opened for this activity. This link appears only if:

- PeopleSoft Maintenance Management is installed.
- The project status is *Active.*
- The project is not a Work Order Managed project.

  For non-Work Order Managed projects, the Work Order Managed option is deselected on the Project Definitions - General Information page.

Project Activity Resource Pool Click to access the Activity Resource Pool page, where you can search and select resource pools to add to the resource pools list to enforce resource pool security.

See Chapter 7, "Managing Programs and Projects," Understanding Resource Pool Security, page 77.

See Also

Chapter 10, "Scheduling and Managing Resources," Understanding Resource Tools, page 143

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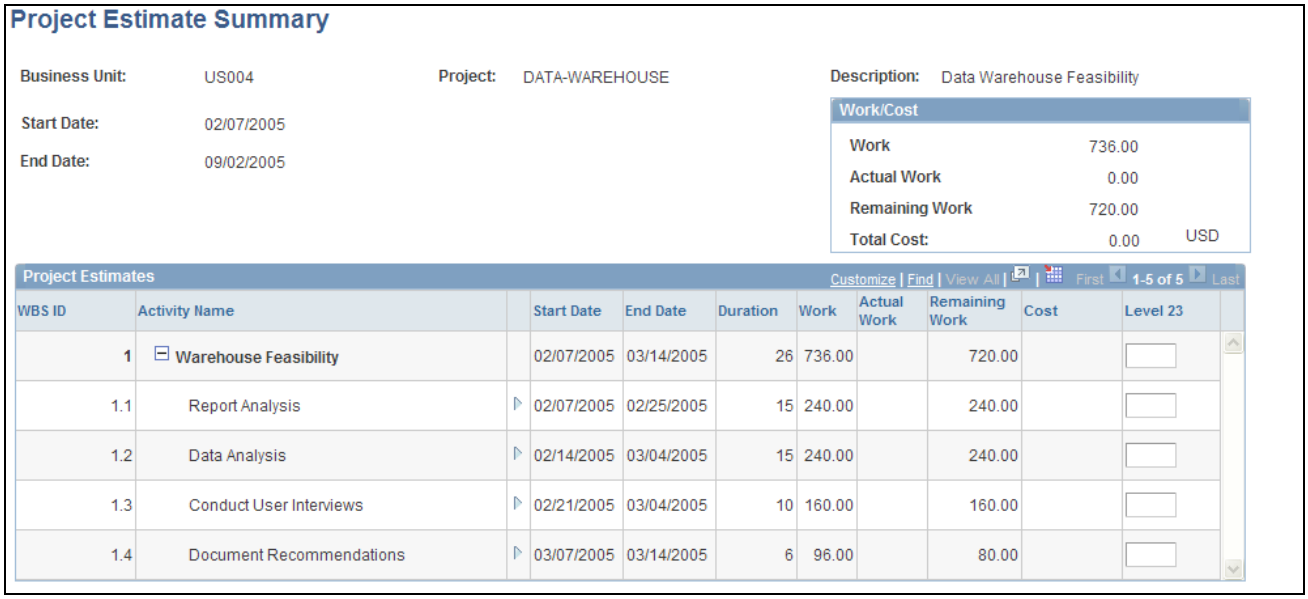
Viewing Project Estimates

Access the Project Estimate Summary page (select Project Estimate Summary from the More drop down box on the Resources page).



Project Estimate Summary page

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

Work/Cost Displays the Work, Actual Work, Remaining Work, and Total Cost, which are summarized at the project level.

Click the Expand Long icon to view details of the resources that are assigned to the activity.

Transferring Resource Assignments

This section provides an overview of resource assignment transfers and discusses how to:

- Transfer assignments from one resource to another.
- Confirm assignment transfers.

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Understanding Resource Assignment Transfers

Use the Transfer Assignments feature to transfer future project and activity assignments from named resources to other named or generic resources. Any user who has access to the Transfer Resource Assignments page can perform a transfer. However, this is typically done by project managers, pool managers, resource managers, or pool administrators.

All future-dated project and activity assignments are available to transfer if:

- A project assignment is future-dated, and therefore the activities for the project are future dated.

  The system compares the earliest assignment start date with the current date to determine future-dated assignments.

- An in-process project assignment contains activity assignments that are future-dated.

- A future-dated project assignment does not contain any activity assignments.

Note. The system treats a future-dated activity that has transactions in the Project Transactions table (PROJ_RESOURCE) as an ongoing activity.

During the transfer process:

- If the Transfer To resource does not already exist on the project or if the resource is not already assigned to an activity assignment that is transferred to the resource, the system assigns the UOM, bill rate type, cost rate type, cost budget item, and revenue budget item to the Transfer To resource's project assignment based on the value of these fields on the Transferred From resource's project assignment.

- You can transfer a project manager role only to a named resource on the Resources page, and the new resource assumes the project manager role. You cannot transfer a project manager role to a generic resource.

- If the transfer is from an activity owner, only named resources on the Resources page can inherit the activity owner designation for project activities.

When you transfer resource assignments using the Transfer Assignments page, you can:

- Select project assignment rows only without selecting activities.

- Select project assignment rows and activity assignment rows.

- Select activities without selecting projects.

If the Transfer From resource is managed in PeopleSoft Resource Management, and the project assignment is in a status other than *Consider*, the assignment is canceled as of the date specified on the page.

If the Transfer From resource's project assignment is *Consider*, the system adds the Transfer To resource to the project in a *Consider* status.

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If the Transfer From resource's project assignment is in a *Requested* or *Committed* status, the Transfer To resource is added to the project in a *Requested* status. If PeopleSoft Resource Management Assignment Approval workflow is enabled and the user that initiates the transfer is the only designated approver, such as the project manager or Transfer To resource's manager, the system initiates a process to update the status to *Committed* and create assignments for a PeopleSoft Resource Management-managed resource. However, if the user who makes the transfer is not the manager of the Transfer To resource nor the project manager, and PeopleSoft Resource Management Assignment Approval workflow is enabled, the system sets the status to *Pending Approval* and triggers PeopleSoft Resource Management Assignment Approval workflow. The transfer process is the same for transferring a named resource to a named resource or a generic resource, except that the system does not create PeopleSoft Resource Management assignments for a generic resource.

For future project and activity assignments, the system processes the transfers based on whether the Transfer To resource is on the selected project or activity and which projects or activities you select to transfer.

When the Transfer To resource is not on the selected project or activity:

- If you select project assignment rows only without selecting activities, the system:
    - Adds the resource to the project with the same assignment schedule dates and units as that of the Transfer From resource.
    - Creates all of the assignment schedules with the same percent of day for the Transfer To resource if multiple assignment schedules exist.
    - Does not remove the Transfer From resource from the project because the resource still has activity assignments.
- If you select project assignment rows and activity assignment rows, the system:
    - Adds the Transfer To resource to the project with the same assignment schedule dates and units as that of the Transfer From resource.
    - Adds the resource to the selected activities with the same percent of day as the Transfer From resource.
    - Removes the Transfer From resource from the project and activity teams.
    - Cancels the PeopleSoft Resource Management assignments as of the date that the transfer occurs if the Transfer From resource is a PeopleSoft Resource Management-managed resource.
- If you select activities without selecting projects, the system:
    - Adds the Transfer To resource to the project with the earliest start date and the latest end date of the selected activities and set the units value to *100.*
    - Adds the Transfer To resource to the selected activities with the same units value as the Transfer From resource.
    - Removes the Transfer From resource from the activity team, but not the project team.
    - Creates a new PeopleSoft Resource Management assignment if the Transfer To resource is a PeopleSoft Resource Management-managed resource. The primary project role will be the same as the Transfer From resource's project role and the assignment dates are the start date of the earliest activity start dates and the end date of the latest activity end date.

When the Transfer To resource is on the selected project but is not on the activity:

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- If you select project assignment rows only without selecting activities and the project assignment dates of the Transfer To resource occur within the range of the project assignment dates of the Transfer From resource, the system updates the project assignment dates of the Transfer To resource to reflect the Transfer From resource's project assignment dates of the selected project.

  If the Transfer From resource's project assignment dates occur within the range of the Transfer To resource's project assignment dates, the system does not update the Transfer To resource's project assignment dates.

  If the project assignment dates for the Transfer From and Transfer To resources do not overlap, the system creates a new assignment schedule, project role, and units value that matches the values of the Transfer From resource. If the resource is a PeopleSoft Resource Management-managed resource, the system creates a new assignment detail row with the new dates, role, and units.

- If you select project assignment rows and activity assignment rows and the Transfer To resource's project assignment dates occur within the Transfer From resource's project assignment dates, the system updates the Transfer To resource's project assignment dates to reflect the Transfer From resource's project assignment dates of the selected project and adds the Transfer To resource to the selected activities.

  If the project assignment dates for the Transfer From and Transfer To resources do not overlap, the system creates a new assignment schedule, project role, and percent of day value that matches the values of the Transfer From resource. If the resource is a PeopleSoft Resource Management-managed resource, the system creates a new assignment detail row with the new dates. In addition, the system adds the Transfer To resource to the selected activities.

- If you select activities without selecting projects, the system adds the Transfer To resource to the selected activities.

When the Transfer To resource is on the selected project and activities:

- If you select project assignment rows only without selecting activities and the project assignment dates of the Transfer To resource occur within the range of the project assignment dates of the Transfer From resource, the system updates the project assignment dates of the Transfer To resource to reflect the Transfer From resource's project assignment dates of the selected project.

  If the Transfer From resource's project assignment dates occur within the range of the Transfer To resource's project assignment dates, the system does not update the Transfer To resource's project assignment dates.

  If the project assignment dates for the Transfer From and Transfer To resources do not overlap, the system creates a new assignment schedule, project role, and percent of day value that matches the values of the Transfer From resource. If the resource is a PeopleSoft Resource Management-managed resource, the system creates a new assignment detail row with the new dates.

- If you select project assignment rows and activity assignment rows and the Transfer To resource's project assignment dates occur within the Transfer From resource's project assignment dates, the system updates the Transfer To resource's project assignment dates to reflect the Transfer From resource's project assignment dates of the selected project.

  If the project assignment dates for the Transfer From and Transfer To resources do not overlap, the system creates a new assignment schedule, project role, and percent of day value that matches the values of the Transfer From resource. If the resource is a PeopleSoft Resource Management-managed resource, the system creates a new assignment detail row with the new dates.

- If you select activities without selecting projects, the system does not change the Transfer To resource's data as the Transfer To resource already exists on the selected project and activities.

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For ongoing projects with future activity assignments, the system processes the transfers based on whether the Transfer To resource is on the selected project or activity.

When the Transfer To resource is not on the selected project or activity and you select to transfer activities, the system:

- Adds the Transfer To resource to the project with the earliest start date and the latest end date of the selected activities with a Units value of *100.*
- Adds the Transfer To resource to the selected activities with the same Units value as that of the Transfer From resource.
- Creates a new PeopleSoft Resource Management assignment for this project with the same primary project role as the Transfer From resource if the Transfer To resource is a PeopleSoft Resource Management-managed resource.

  The assignment dates are the start date of the earliest activity start date and the end date of the latest activity end date.

When the Transfer To resource is on the selected project but is not on the activity and you select to transfer activities, the system adds the resource to the selected activities with the same Units value as the Transfer From resource.

When the Transfer To resource is on the selected project and activities and you select to transfer activities, the system does not change the Transfer To resource's activity schedule.

Important! Take special care when you transfer assignments to resources that are already assigned on the same project. A number of complex scenarios exist that require manual intervention that the system cannot resolve. You have to manually resolve many issues such as project role, bill and cost rates, and units percentage.

See Also

PeopleSoft Resource Management 9.1 PeopleBook, "Defining PeopleSoft Resource Management Business Units," Specifying PeopleSoft Resource Management Business Unit Options

Pages Used to Transfer Resource Assignments

Page Name	*Definition Name*	*Navigation*	*Usage*
Transfer Assignments	RS_TRNSFR_ASSGNMNT	Program Management, Project Definitions, Transfer Assignments, Transfer Assignments	Transfer assignments from one resource to another.
Transfer Assignments Confirmation	RS_TRNSASSGN_CONFM	Click the Transfer Assignment button on the Transfer Assignments page.	Review the changes that the system will make as a result of the assignment transfer and confirm that you want to make the assignment transfer from one resource to another.

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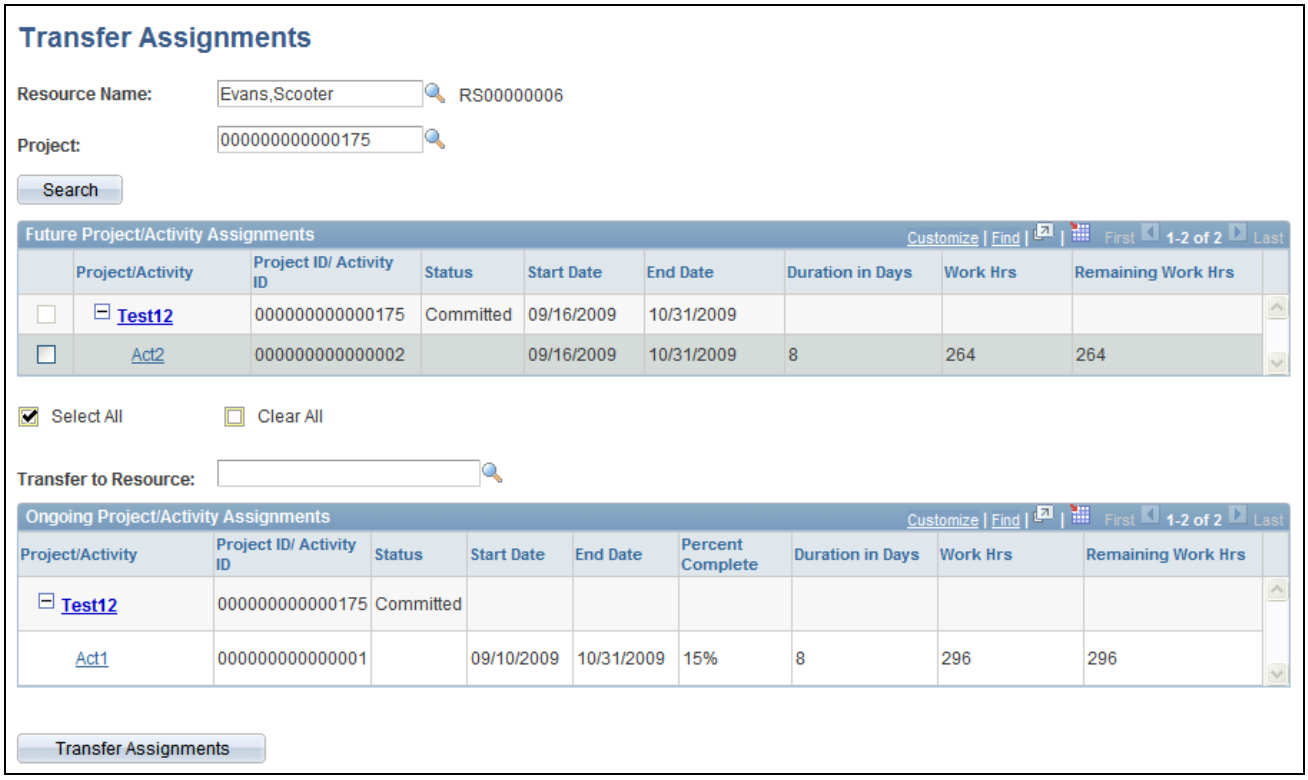
Page Name	Definition Name	Navigation	Usage
Update Confirmation	RS_UPDASSGNS_CONFM	Click the OK button on the Transfer Assignments Confirmation page.	View the assignment transfer confirmation and any errors that occurred during the transfer.

Transferring Assignments from One Resource to Another

Access the Transfer Assignments page (Program Management, Project Definitions, Transfer Assignments, Transfer Assignments).



Transfer Assignments page

Resource Name Enter the name of the resource from which you want to transfer an assignment. You must enter a resource name to search for assignments. The resource must be a named resource on a project.

PC Business Unit (project costing business unit) Optionally, enter a business unit to filter the project assignments to that business unit for the resource. This field appears only if the resource that you enter in the Resource Name field has assignments in more than one business unit.

Project Optionally, enter the project to view project assignments for the resource.

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Search	Click to display the assignments in the Future Project/Activity Assignments grid that have been assigned to the resource that you entered in the Resource Name field.
	Select the resource's project and activity assignments that you want to transfer. Selecting a project automatically selects the project's future-dated activity assignments. You cannot select ongoing projects (the check box is not available for selection) but you can select future activity assignments on ongoing projects.
Project/Activity	Displays the project or activity description. The project and activity descriptions appear as links. Click a <project description>to access the Resources page for that project in a new browser window on which you can view and update details for the project team. Click an <activity description> to access the Resources By Activity page for that activity in a new browser window on which you can view and update details for the activity schedule.
Status	Displays status values from the Resources page only on project assignment rows.
Start Date and **End Date**	Displays the earliest start date and latest end date of project assignments on project rows. The start date and end date of activities appear on activity rows.
Duration in Days	Displays the activity duration.
Work Hrs (work hours)	Displays the value from the Work column on the Resources by Activity page.
Remaining Work Hrs (remaining work hours)	Displays the value from the Remaining Work column on the Resources by Activity page.
Select All and **Clear All**	Click to select or deselect all of the available rows in the Future Project/Activity Assignments grid.
Transfer to Resource	Enter a generic or named resource to which you want to transfer the assignments. For named resources, the system prompts for employee IDs from the Personal Data (PERSONAL_DATA) table.
View Resource Schedule	Click to transfer to the Monthly Schedule page for the resource in the Transfer to Resource field. This link is visible only if the resource is a PeopleSoft Resource Management-managed resource.
Transfer Assignments	Click to transfer the assignments from the Transfer From resource to the Transfer To resource. When you click this button, the system transfers you to the Transfer Assignments Confirmation page.

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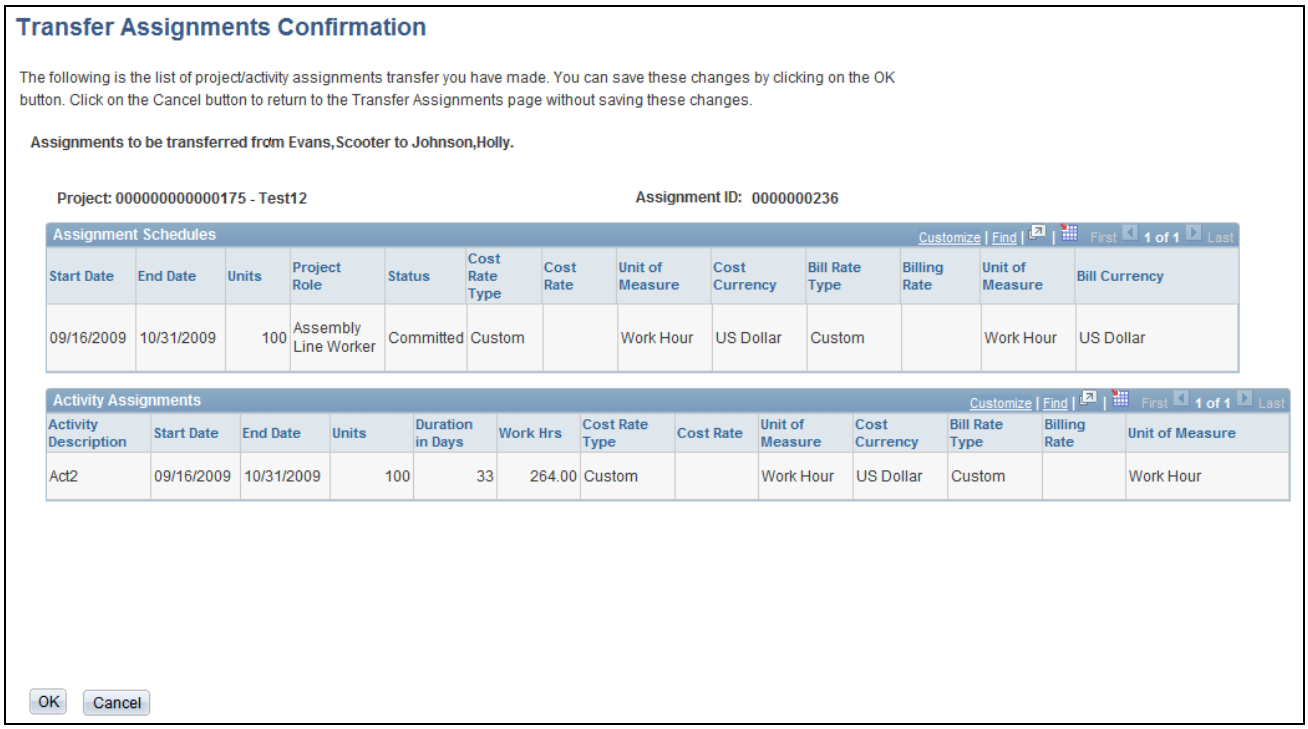
Ongoing Project/Activity Assignments

The Ongoing Project/Activity Assignments grid displays all of the ongoing project and activity assignments for the selected resource. The columns in this grid are the same as the columns in the Future Project/Activity Assignments grid, with the addition of the Percent Complete column, which displays the percent complete of the project activity. This grid is display-only and these assignments are not available for transfer.

Confirming Assignment Transfers

Access the Transfer Assignments Confirmation page (click the Transfer Assignment button on the Transfer Assignments page).



Transfer Assignments Confirmation page

Review and verify the list of assignments that the system will transfer when you click OK. If you do not want to transfer all of the assignments that are in the grid, click Cancel.

Start Dateand **End Date** Displays the assignment schedule start and end dates from the Resource detail page.

Units Displays the units percentage from the Assignment Schedule grid on the Resource detail page.

Project Role Displays the project role from the Assignment Schedule grid on the Resource detail page.

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Status Displays the value from the Resource Status column on the Resources page. However, if the Transfer From resource's status is *Committed,* PeopleSoft Resource Management Assignment Approval workflow is initiated, the Transfer To resource is a PeopleSoft Resource Management-managed resource, and the user is not the manager of the Transfer To resource, the system sets the status to *Pending Approval* and initiates the PeopleSoft Resource Management Assignment Approval workflow. If the user is the manager of the Transfer To resource, then the value is *Committed.*

Cost Rate Type and **Bill Rate Type** Displays the cost and bill rate types from the Resources page. If the Transfer To resource is not already on the project, the system sets the cost and bill rate types for the Transfer To resource the same as that of the Transfer From resource.

Situations exist in which this is not possible, for example:

- The Transfer From resource rate type is *Employee* and this rate type is not defined for the Transfer To resource.
- The Transfer To resource is a generic resource and the Transfer From resource's rate type is not valid for generic resources.

In these situations, the system sets the rate type to the default rate type for the Transferred To resource type (named resource or generic resource) that is defined on the Program Management Options page.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Establishing PeopleSoft Program Management Business Unit Options, page 22.

Cost Rate and **Billing Rate** Displays the cost and bill rates from the Resources page. If the Transfer To resource is not already on the project, the system sets the cost rate and bill rate based on the Transfer From resource's cost rate type and bill rate type. If the cost or bill rate type is *Custom*, then the system sets the cost and bill rates of the Transfer To resource to the same value as the Transfer From resource.

Working with Master Resource Schedules

This section discusses how to:

- Set up master resource schedules.
- Select multiple projects.
- Select multiple resources.
- View master resource schedules.
- View resource graphs.
- View resource workload statistics.

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Pages Used to Work with Master Resource Schedules

Page Name	*Definition Name*	*Navigation*	*Usage*
Master Resource Schedule (selection parameters)	PGM_MRS_SPARAM_PG	Program Management, Program Tools, Master Resource Schedule, Master Resource Schedule (selection parameters)	Specify the resources and projects to appear on the Master Resource Schedule page.
Multiple Project Selection	PGM_MRS_MPROJ	Click the Search Projects button on the Master Resource Schedule (selection parameters) page.	Select the projects to view on the Master Resource Schedule page.
Multiple Resource Selection	PGM_MRS_MRES	Click the Select Resources button on the Master Resource (selection parameters) page.	Select the resources to view on the Master Resource Schedule page.
Master Resource Schedule	PGM_MRS_SCHED	• Click the View Master Resource Schedule button on the Master Resource (selection parameters) page. • Program Management, Project Definition, Resources, Resources. Click the Master Resource Schedule link. The system generates the grid for only the named resource with a workload scope of a single project.	View the daily workload of all resources in a workload scope. View the activity detail and work that is associated with each resource, project, and activity.
Resource Workload Statistics	PGM_WSTATS	Click the Resource Workload Statistics link on the Master Resource Schedule page.	View summary statistics for the resources from the Master Resource Schedule page.
View Resource Graph	PGM_MRS_GRPH	Click a resource name on the Master Resource Schedule page.	View a vertical bar chart of a resource's workload by day.

Setting Up Master Resource Schedules

Access the Master Resource Schedule (selection parameters) page (Program Management, Program Tools, Master Resource Schedule, Master Resource Schedule (selection parameters)).

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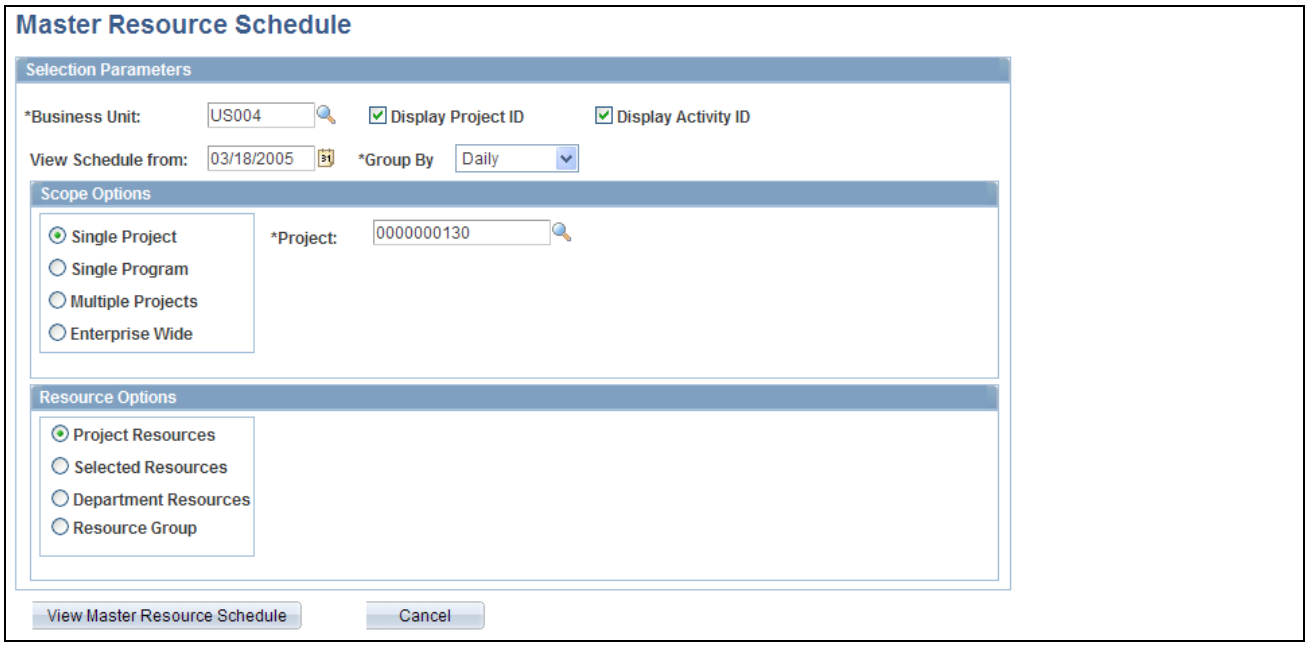

Master Resource Schedule (selection parameters) page

View Schedule From Enter the date from which you want to generate the master resource schedule. The current date appears by default.

Display Project ID Select to display the project ID on the Master Resource Schedule page.

Display Activity ID Select to display the activity ID on the Master Resource Schedule page.

Group By Select an option by which to group the results on the Master Resource Schedule page. Options are:

- *Daily:* Displays the resource workload by day.
- *Weekly:* Displays the resource workload by week.
- *Monthly:* Displays the resource workload by month.

View Master Resource Schedule Click to generate the master resource schedule after you select scope options and resource options on this page. The system transfers you to the Master Resource Schedule page where you can view the workload for the resources based on the scope and resource options that you select. The system saves the search criteria that you have entered when you click this button, so you can reaccess the master resource schedule without reentering the search criteria.

Scope Options

Use the Scope Options group box to select the scope for the master resource schedule. If you select a scope option other than Single Project and the system encounters generic resources with the same name, the system does not group the generics resources on the Master Resource Schedule.

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Single Project Select to view the master resource schedule for a single project. You must enter a project ID in the Project field if you select this option.

Project Enter the project ID for which to display the master resource schedule. This field appears only when you select the Single Project option.

Single Program Select to view the master resource schedule for an entire program. You must enter a program ID in the Program ID field when you select this option. You can select the program from the Enterprise Program tree by clicking the Select from Enterprise Program Tree link.

Program ID Enter the program ID for which to display the master resource schedule. This field appears only when you select the Program ID option.

Multiple Projects Select to view the master resource schedule for multiple projects. Click the Search Project button that appears when you select this option to select the projects that you want to view on the master resource schedule.

Search Project Click to access the Multiple Project Selection page, where you select the projects to view on the master resource schedule. The system lists the projects that you select in the Currently Selected Projects grid.

See Chapter 10, "Scheduling and Managing Resources," Selecting Multiple Projects, page 201.

Currently Selected Projects Displays the search results from the Multiple Project Selection page in a grid format.

Enterprise Wide Select to view the master resource schedule for all of the active and pending projects in the business unit that you specify. You can exclude all active projects or all pending projects from the view by selecting *Active* or *Pending* from the Exclude Projects With Status drop-down list box.

Exclude Projects With Status Select *Active* or *Pending* from the drop-down list box to exclude all active projects or all pending projects, respectively. To show projects in both statuses, leave this field blank.

Resource Options

Use the Resource Options group box to select which resources appear on the master resource schedule. Generic resources do not appear for options other than Project Resources.

Project Resources Select to display all of the resources on all of the projects that you selected in the Scope Options group box on the master resource schedule.

Selected Resources Select to view the master resource schedule for specific resources. Click the Select Resources button that appears when you select this option to select the resources that you want to view on the master resource schedule.

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Select Resources	Click to access the Multiple Resource Selection page on which you select the resources to view on the master resource schedule. The system lists the resources that you select in the Currently Selected Projects grid. See Chapter 10, "Scheduling and Managing Resources," Selecting Multiple Resources, page 203.
Currently Selected Resources	Displays the search results from the Multiple Resource Selection page in a grid format.
Department Resources	Select to view the master resource schedule for a single department. You must enter a department ID in the Department field when you select this option. All of the resources that this department contains will appear on the master resource schedule, even if they are not assigned to any of the projects that you selected in the scope options.
Department	Enter the department ID that contains the resources to display in the master resource schedule. This field appears only when you select the Department Resources option.
Resource Group(radio button)	Select to view the master resource schedule for a resource group. All of the resources in the resource group will appear on the master resource schedule, even if they are not assigned to any of the projects that you selected in the scope options. You must enter a resource group ID in the Resource Group field when you select this option.
Resource Group	Enter the resource group ID that you want to display in the master resource schedule. This field appears only when you select the Resource Group option.

Selecting Multiple Projects

Access the Multiple Project Selection page (click the Search Projects button on the Master Resource Schedule (selection parameters) page).

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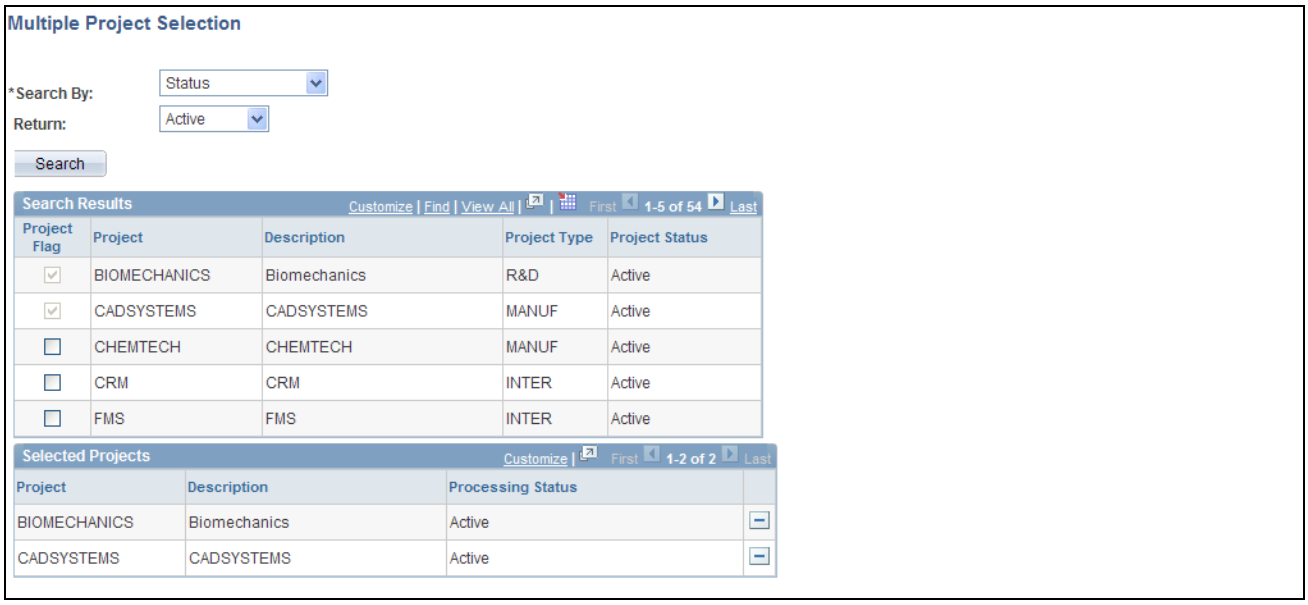

Multiple Project Selection page

Search By

Select a value by which to search for projects. Options are:

- *Description:* Enter a description in the Description field and click Search to search for projects by description.
- *Project ID:* Enter a project ID in the Project ID field and click *Search* to search for projects by project ID.
- *Status:* Select *Active* or *Pending* to search for projects by processing status.

Select to include this project in the list of projects to include in the master resource schedule.

Search Results

Select the project in the Search Results grid to move to the Selected Projects grid. The selected projects will be included in the master resource schedule.

You can iteratively change the search criteria and select additional projects to move to the Selected Projects grid.

Selected Projects

This grid lists the projects that will appear in the Currently Selected Projects grid on the Master Resource Schedule (selection parameters) page after you click OK.

All of the selected projects remain in the grid until you manually remove them or generate the master resource schedule based on a different scope option.

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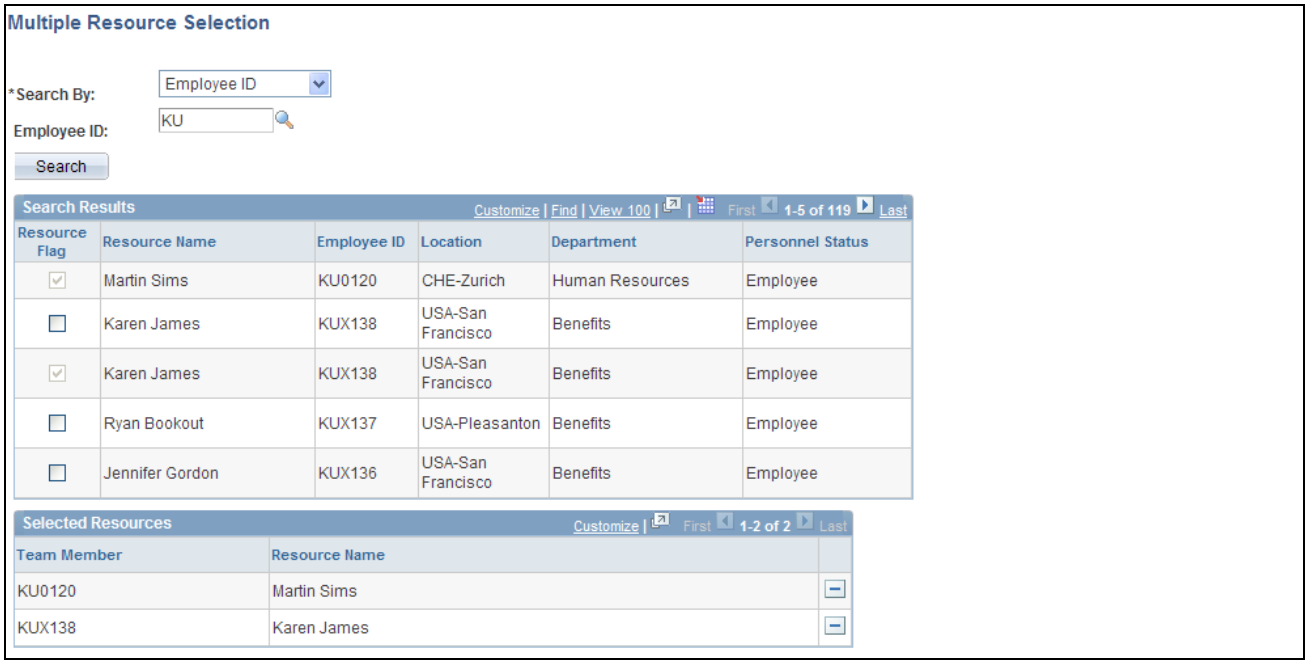
Selecting Multiple Resources

Access the Multiple Resource Selection page (click the Select Resources button on the Master Resource (selection parameters) page).



Multiple Resource Selection page

Search By

Select a value by which to search for resources. Options are:

- *Employee ID:* Enter an employee ID in the Employee ID field and click Search to search for resources by employee ID.
- *First Name:* Enter a full or partial first name in the First Name field and click Search to search for resources by first name.
- *Last Name:* Enter a full or partial last name in the Last Name field and click Search to search for resources by last name.

Search Results

Select the resource in the Search Results grid to move to the Selected Resources grid. The selected resources will be included in the master resource schedule.

You can iteratively change the search criteria and select additional resources to move to the Selected Resources grid.

Selected Resources

Lists the resources that will appear in the Currently Selected Resources grid on the Master Resource Schedule (selection parameters) page after you click OK.

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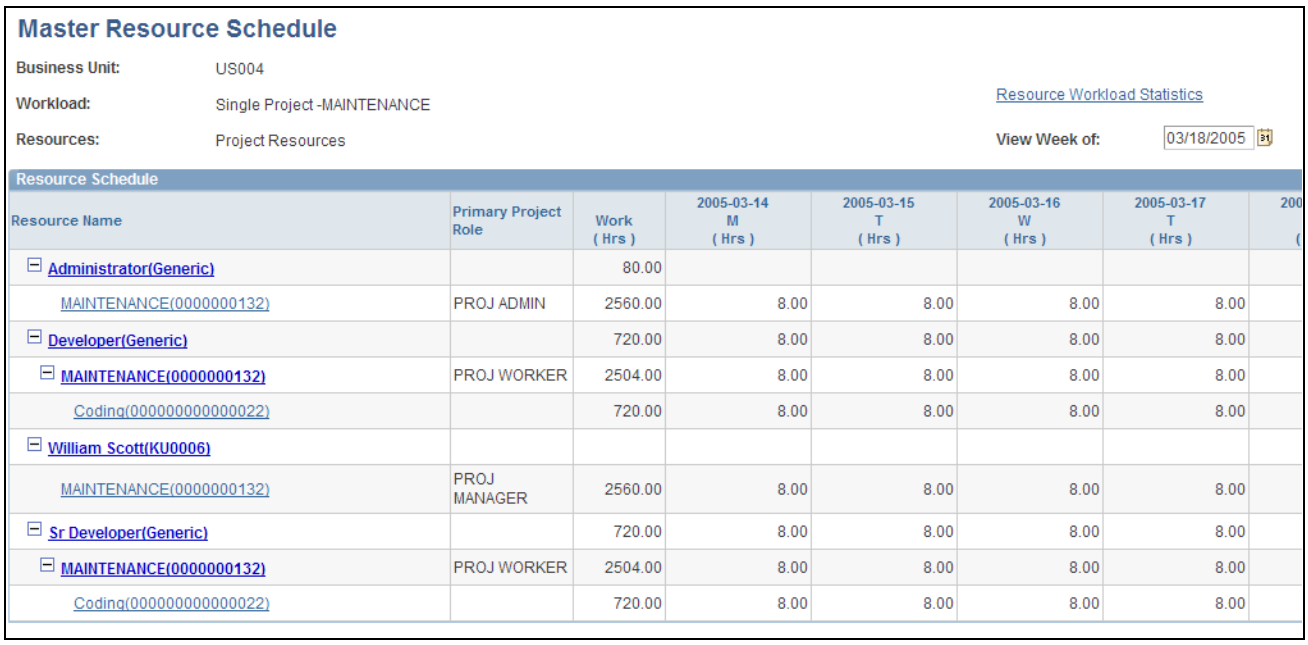
All of the selected resources remain in the grid until you manually remove them or generate the master resource schedule based on a different resource option.

Viewing Master Resource Schedules

Access the Master Resource Schedule page (click the View Master Resource Schedule button on the Master Resource (selection parameters) page).



Master Resource Schedule

Business Unit: US004

Workload: Single Project -MAINTENANCE

Resources: Project Resources

Resource Workload Statistics

View Week of: 03/18/2005

Resource Schedule

Resource Name	Primary Project Role	Work (Hrs)	2005-03-14 M (Hrs)	2005-03-15 T (Hrs)	2005-03-16 W (Hrs)	2005-03-17 T (Hrs)	200
Administrator(Generic)		80.00					
MAINTENANCE(0000000132)	PROJ ADMIN	2560.00	8.00	8.00	8.00	8.00	
Developer(Generic)		720.00	8.00	8.00	8.00	8.00	
MAINTENANCE(0000000132)	PROJ WORKER	2504.00	8.00	8.00	8.00	8.00	
Coding(0000000000000022)		720.00	8.00	8.00	8.00	8.00	
William Scott(KU0006)							
MAINTENANCE(0000000132)	PROJ MANAGER	2560.00	8.00	8.00	8.00	8.00	
Sr Developer(Generic)		720.00	8.00	8.00	8.00	8.00	
MAINTENANCE(0000000132)	PROJ WORKER	2504.00	8.00	8.00	8.00	8.00	
Coding(0000000000000022)		720.00	8.00	8.00	8.00	8.00	

Master Resource Schedule page

The business unit, projects, and resources that were used for generating the master resource schedule appear in the header. This page displays the workload for all of the resources based on the selection parameters that you entered on the Master Resource Schedule (selection parameters) page, even if they are not assigned to a project. The initial display of the master resource schedule is based on the latest of these dates:

- The earliest resource assignment date on the projects in the workload scope.
- The date that you entered in the View Schedule From field on the Master Resource Schedule (selection parameters) page.

If PeopleSoft Resource Management is installed, the system uses rows from the Resources page in the statuses of *Considered*,*Committed*, and *Requested* for named resources and *Allocated*, *Considered*, and *Requested* for generic resources to generate the master resource schedule. If PeopleSoft Resource Management is not installed, the system uses all of the rows from the Resources page to generate the master resource schedule.

Click the blue *First*,*Previous*,*Next*, and *Last* navigation arrows to scroll horizontally through the period rows or vertically through the resource rows. A plus or minus symbol appears next to the resource name if that resource is assigned to a project, and the symbols appear next to the project description if the resource is assigned to an activity on that project. Click the plus and minus symbols to expand or collapse the projects under a resource or the activities under a project.

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Resource Workload Statistics Click to access the Resource Workload Statistics page, where you can view summary statistics for the resources.

View Week Ofand **View** Enter a specific date in the View Week Of field for the week that you want to view and click the View button to change the view of the master resource schedule. You can view the Master Resource Schedule only for dates in between the start and end dates of the selected projects

Resource Name Displays the selected resources and the projects and activities to which the resource is assigned. The values are:

<Employee name (employee ID)>: Click to transfer to the View Resource Graph page, where you can view a graph of the resource's workload by day. The link works only if the resource is a PeopleSoft Resource Management-managed resource or a generic resource. If the resource is a generic resource, *Generic* appears in the parentheses in place of the employee ID.

<Project description (project ID)>: Click to transfer to the Resource Detail page, where you can view and update the assignment schedule for the resource. The project ID appears after the project description only if you select the Display Project ID option on the Master Resource Schedule (selection parameters) page. The project row appears only if the resource is assigned to a project.

<Activity description (activity ID)>: Click to transfer to the Resources by Activity page, where you can view and update the activity details and schedule. The activity ID appears after the activity description only if you select the Display Activity ID option on the Master Resource Schedule (selection parameters) page. The activity row appears only if the resource is assigned to an activity.

Primary Project Role Displays the primary project role from the Resources page for the project that is shown for both named and generic labor resources.

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Indicates that the resource is overloaded. Move your mouse cursor over the indicator to see the date range for which the resource is overloaded.

The overloaded indicator is calculated based on the latest of these dates:

- The resource's earliest assignment date on the projects in the workload scope.
- The date that you entered in the View Schedule From field on the Master Resource Schedule (selection parameters) page.

For named resources, the system uses these rules to determine whether a resource is overloaded:

- If the resource is assigned to a project on a day that is not a standard working day for that resource, the resource is overloaded.
- If the workload scope is a single project, the system calculates the overload for all resources based on the hours per day that are defined for the project.

  If a resource is assigned to activities that add up to more hours per day than the project, the resource is overloaded.
- If the workload scope contains multiple projects, the system checks to see whether a resource is overloaded only for PeopleSoft Resource Management-managed resources.

  The system calculates the overload based on the standard work hours per day from PeopleSoft Resource Management. If a resource is assigned to activities that total more than the resource's standard work hours per day, then they are overloaded.

  For generic resources, the system displays the overload indicator based on the single project to which the generic resource is assigned regardless of the scope that is selected. The system calculates the overload for generic resources based on the hours per day that are defined for the project. If the number of hours that a generic resource is assigned to activities adds up to more hours per day than the project hours per day, the generic resource is overloaded.

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Work (Hrs) Work (Hours)

Displays the total workload, in hours, for the scope that you defined on the Master Resource Schedule (selection parameters) page for each of these rows:

- Resource row work hours are calculated based on the sum of the hours for all of the project activities in the workload scope to which the resource is assigned.
- Project row work hours are calculated based on the project assignment schedule from the Resource Detail page. The daily workload is calculated based on the Hours Per Day value that is defined on the Program Management tab in the Project General component, multiplied by the Units value on the Resource Detail page.
- Activity row work hours are calculated based on the hours for the activity to which the resource is assigned.

Period (Hrs) (Hours)

Displays the amount of workload hours for the particular period. The system displays the period columns divided into days, weeks, or months depending on the group by option that you selected on the Master Resource Schedule (selection parameters) page.

The system uses the project calendar that is specified on the Project General - Program Management page for the project to determine which days to display workload hours for. The system displays the workload hours for the days that the resource is assigned on the project based on the normal business days that are defined on the project calendar. For example, if the project has a calendar with normal business days of Monday, Wednesday, and Friday, the workload hours appear only for Mondays, Wednesdays, and Fridays for each resource that is assigned to an activity on this project.

Viewing Resource Graphs

Access the View Resource Graph page (click a resource name on the Master Resource Schedule page).

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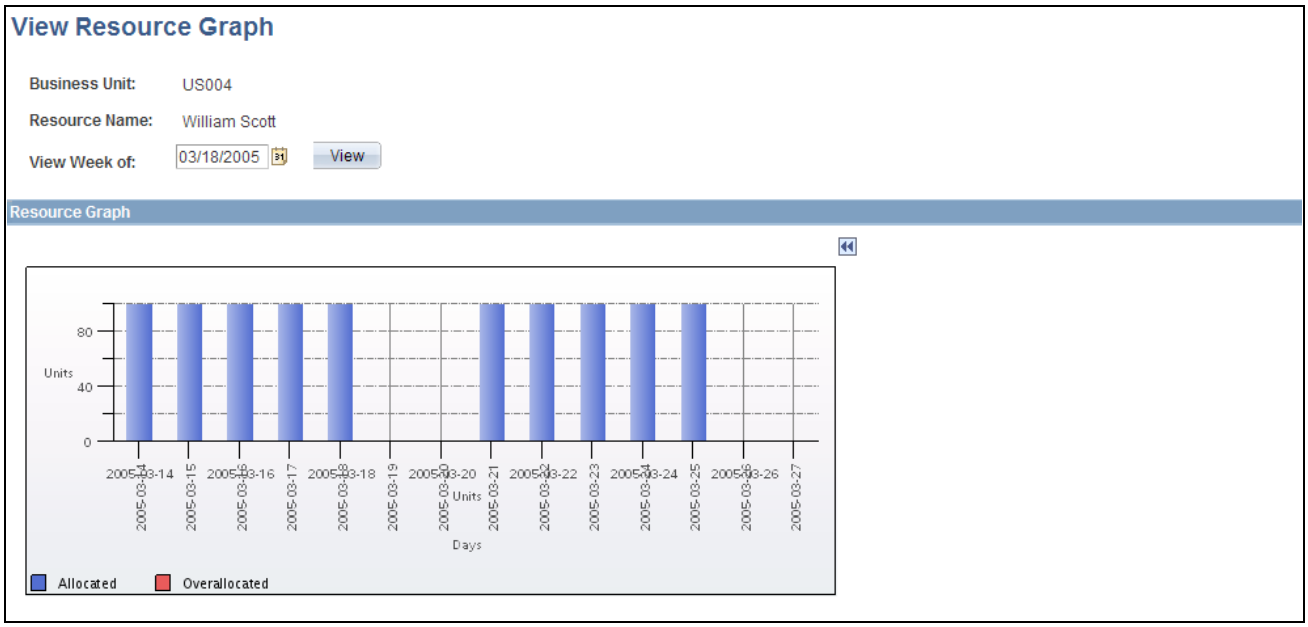

View Resource Graph page

The resource graph is a vertical bar chart that shows the resource's workload by day. For named resources, the bar for each day represents the total units from the Resources by Activity page for each project activity that is included in the scope. For generic resources, the bar for each day represents the sum of hours that the resource is assigned to activities based on only a single project. The system appends the project name to the generic resource name in the Resource Name field. The system renders the graph based on the page from which you accessed it and the scope. This table lists the different pages from which you can access the View Resource Graph page and how the segments are calculated based on the scope:

Page from which you accessed the View Resource Graph	***Scope***	***Segment Calculation***
Master Resource Schedule	Single project.	The segments are calculated based on the hours per day that are defined for the project.
Master Resource Schedule	Multiple projects.	The segments are calculated based on the standard work hours per day, which are calculated from PeopleSoft Resource Management.
Resources	Single Project (the project that you used to access the Resources page).	The segments are calculated based on the hours per day that are defined for the project.

If the workload is greater than 100 percent, the resource is overloaded, which appears as a red segment in the graph.

Click the blue Scroll Left and Scroll Right navigation arrows to scroll horizontally through the days.

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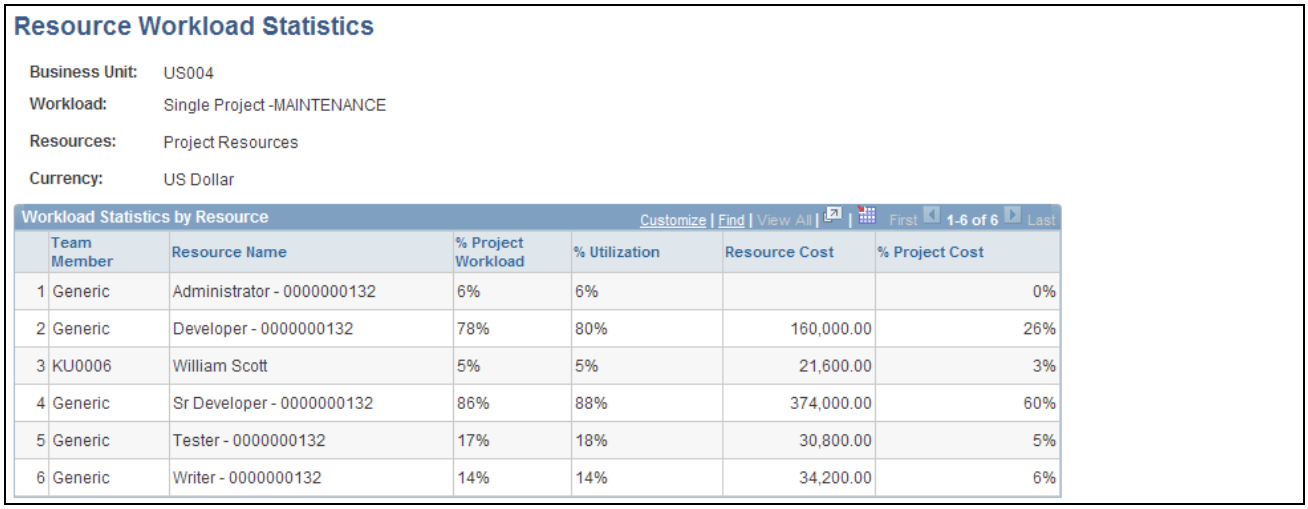
Viewing Resource Workload Statistics

Access the Resource Workload Statistics page (click the Resource Workload Statistics link on the Master Resource Schedule page).



Resource Workload Statistics

Business Unit: US004
Workload: Single Project -MAINTENANCE
Resources: Project Resources
Currency: US Dollar

Workload Statistics by Resource — Customize | Find | View All | First 1-6 of 6 Last

	Team Member	Resource Name	% Project Workload	% Utilization	Resource Cost	% Project Cost
1	Generic	Administrator - 0000000132	6%	6%		0%
2	Generic	Developer - 0000000132	78%	80%	160,000.00	26%
3	KU0006	William Scott	5%	5%	21,600.00	3%
4	Generic	Sr Developer - 0000000132	86%	88%	374,000.00	60%
5	Generic	Tester - 0000000132	17%	18%	30,800.00	5%
6	Generic	Writer - 0000000132	14%	14%	34,200.00	6%

Resource Workload Statistics page

The business unit, workload, resources, and currency appear in the header. The workload and resource scope is the same as what you defined for the master resource schedule. The system uses the default currency of the business unit.

Team Member — Displays the employee ID of named resources. *Generic* appears for generic resources.

Resource Name — Displays the resource name for named resources. For generic resources, the name of the generic resource and the project ID appear.

% Project Workload (project workload percentage) — Displays the percent of the total project workload to which each resource is assigned, which is calculated as *((Resource workload) ÷ (Project workload))* × 100. For example, if a resource is assigned a total workload of 40 hours and the total project workload is 160 hours, the project workload percentage for that resource is 25 percent.

% Utilization (Utilization percentage) — Displays the utilization percentage of a resource within the workload scope, calculated as *(Resource's total workload) ÷ (Resource's total capacity)* × 100.

Resource Cost — Displays the project total cost for the resource, calculated by summing the values in the Cost column on the Resource by Activity page.

% Project Cost (project cost percentage) — Displays the projected percent of the total project cost, which is calculated as *((Resource's cost) ÷ (Total project cost))* × 100.

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Analyzing Resource Lists

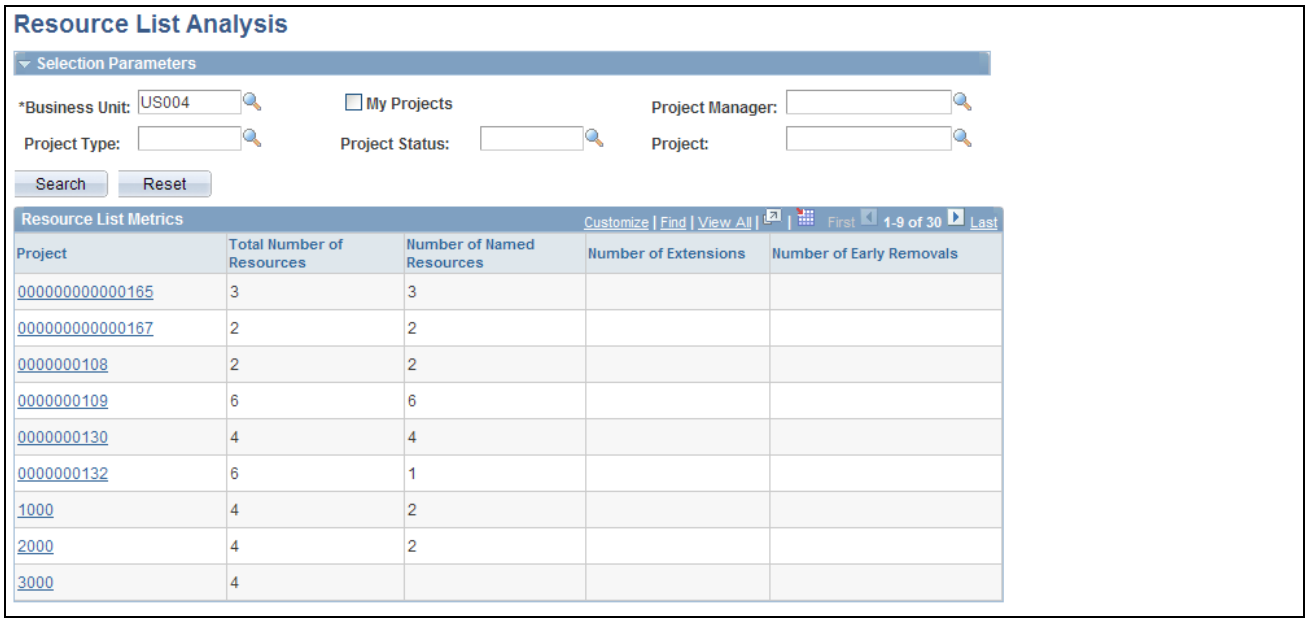
This section discusses how to analyze a resource list.

Page Used to Analyze Resource Lists

Page Name	*Definition Name*	*Navigation*	*Usage*
Resource List Analysis	PC_EA_RESOURC_LIST	Program Management, Interactive Reports, Resource List	Use search criteria to display resource statistics about the projects that meet the criteria.

Analyzing a Resource List

Access the Resource List Analysis page (Program Management, Interactive Reports, Resource List).



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 default values for the page.

Project Click a link in this column to access the Resources page for the project to view and edit resource details.

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Total Number of Resources	Displays the total number of labor resources that are on the project's team, including assigned, unassigned, past, and present team members.
Number of Named Resources	Displays the number of resources who are identified by employee ID. Generic resources are not included in this total.
Number of Extensions	Displays the number of times that resources are extended beyond their original end dates in PeopleSoft Resource Management.
Number of Early Removals	Displays the number of times that resources are 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 provides an overview of the Resource Workbench and discusses how to view the Resource Workbench.

Understanding the Resource Workbench

This page displays lists of this data:

- Project activities to which the resource is assigned.

  When you access this page, all of the resource's current project activities appear. You can filter the list of activities based on a date range or status.

- Any status reports, issues, or deliverables that are assigned to the resource.
- The last five time reports, which are sorted by the creation date in descending order.
- The last five expense reports, which are sorted by the creation date in descending order.

Page Used to View the Resource Workbench

Page Name	*Definition 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 (Program Management, Project Management, Resource Workbench).

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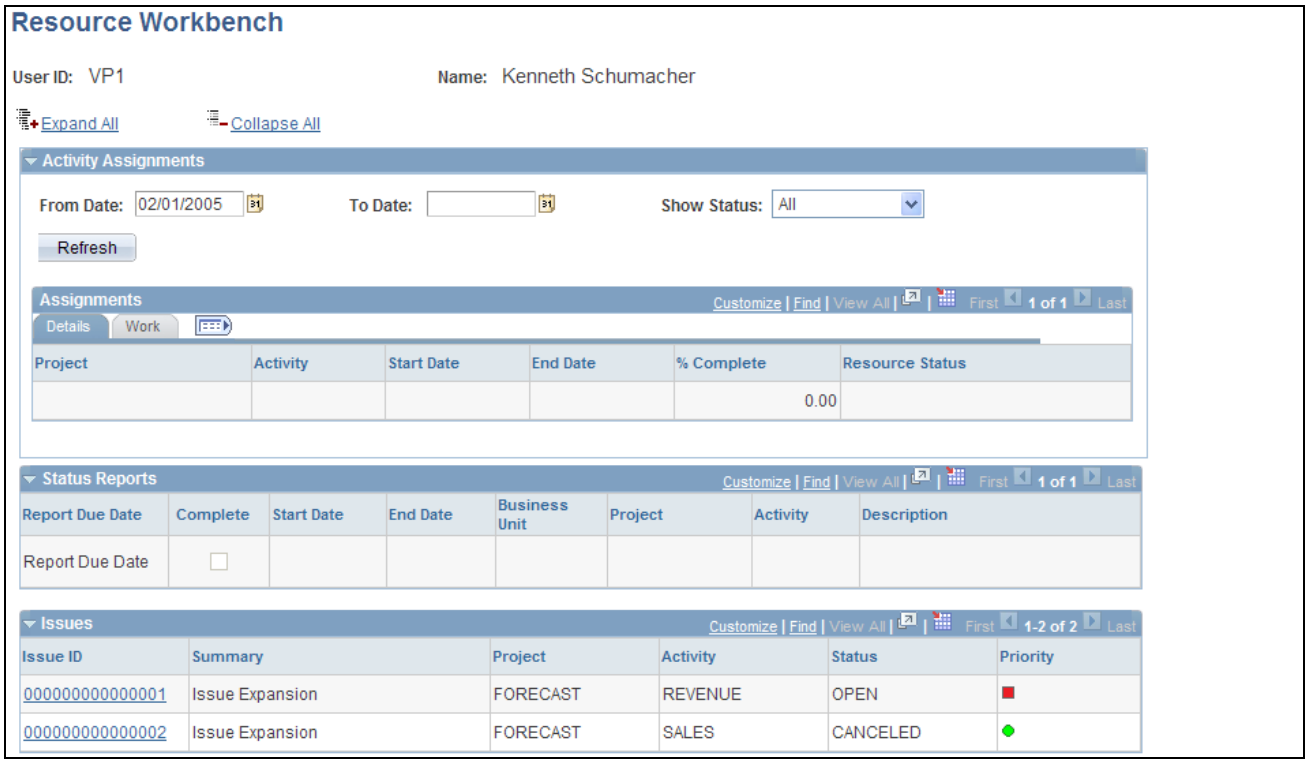

Resource Workbench page (1 of 2)

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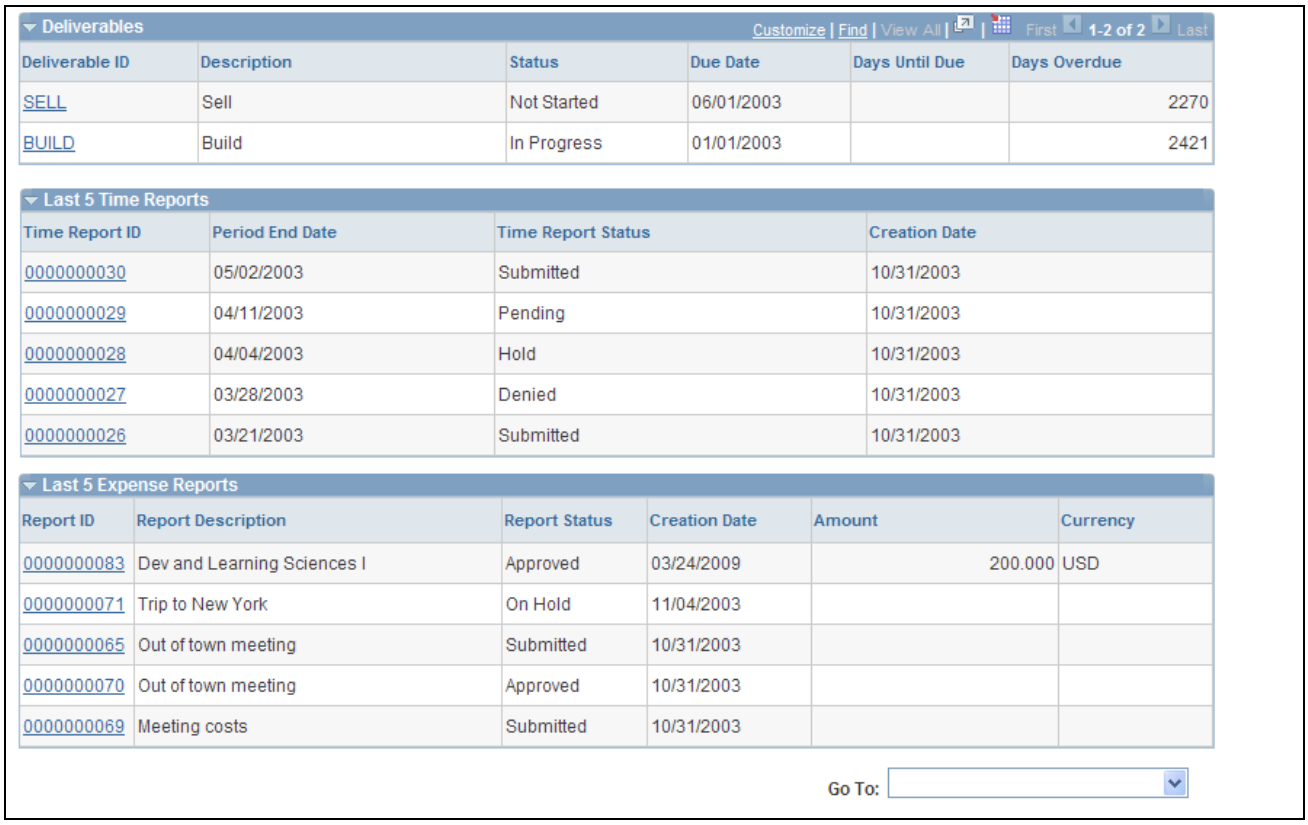

Deliverables — Customize | Find | View All | First 1-2 of 2 Last

Deliverable ID	Description	Status	Due Date	Days Until Due	Days Overdue
SELL	Sell	Not Started	06/01/2003		2270
BUILD	Build	In Progress	01/01/2003		2421

Last 5 Time Reports

Time Report ID	Period End Date	Time Report Status	Creation Date
0000000030	05/02/2003	Submitted	10/31/2003
0000000029	04/11/2003	Pending	10/31/2003
0000000028	04/04/2003	Hold	10/31/2003
0000000027	03/28/2003	Denied	10/31/2003
0000000026	03/21/2003	Submitted	10/31/2003

Last 5 Expense Reports

Report ID	Report Description	Report Status	Creation Date	Amount	Currency
0000000083	Dev and Learning Sciences I	Approved	03/24/2009	200.000	USD
0000000071	Trip to New York	On Hold	11/04/2003		
0000000065	Out of town meeting	Submitted	10/31/2003		
0000000070	Out of town meeting	Approved	10/31/2003		
0000000069	Meeting costs	Submitted	10/31/2003		

Go To:

Resource Workbench page (2 of 2)

From Dateand **To Date** Enter dates to restrict the project activities that appear in the Assignments grid. The system uses the current date as the default for the From Date field.

Show Status Select to filter the project activities that appear in the Assignments grid to a specific status. This status is the resource status from the project resource level. Values are:

All: This is the default value.

Committed

Completed

Requested

Refresh Click to refresh the project activities that appear in the Assignments grid after entering a value into the From Date field or the To Date field or selecting a status from the Show Status drop-down list box.

View Chart Click to access the Resource Workbench - Gantt Chart page, where you can view your project schedule.

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Go To Select from these options:

Create Expense Report: Transfers you to the Create Expense Report component in PeopleSoft Expenses, where you can view pending expense reports or create a new expense report.

Create Time Report: Transfers you to the Create Time Report component in PeopleSoft Expenses, where you can view pending time reports or create a new time report.

This field appears only if you have PeopleSoft Expenses installed.

Assignments - Details

When you access this page, all of the resource's current project activities appear in the Assignments grid. You can filter the results using the From Date,To Date, and Show Status fields.

Activity Displays the activity ID as a link to the Activity - General Information page, where you can view or update activity details.

%Complete (percent complete) Displays the percentage of the activity that is complete. This field is display-only.

Assignments - Work

Units Displays the percentage of the resource's time that is assigned to this activity.

Assigned Work Displays the number of hours that this resource is scheduled to work on this assignment.

Actual Work Displays the number of approved hours from PeopleSoft Expenses for which this resource has entered time.

Remaining Work Displays the amount of time that is left to complete this activity.

Status Reports, Issues, and Deliverables

The system displays any status reports, issues, or deliverables that are assigned to the resource. Click a link in the appropriate column to display the details of a status report, issue, or deliverable. No search record prompt is available to access the page, because it shows only data about the user who signs in and navigates to the page.

Last 5 Time Reports

The system displays the five most current time reports. Click a *<Time Report ID>* link to access the View Time Report page, where you can view details of the time report.

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Last 5 Expense Reports

The system displays the five most current expense reports . Click a <*Report ID*> link to access the View Expense Report page, where you can view details of the expense report.

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Chapter 11

Distributing Costs to Budget Detail Rows

This chapter provides an overview of cost and revenue budget generation, lists prerequisites, and discusses how to distribute costs to budget detail rows.

Understanding Cost and Revenue Budget Generation

PeopleSoft Program Management enables you to generate project cost and revenue budget details from the amounts defined on the Resources by Activity page.

This section discusses:

- Budget generation process flow.
- Budget details generation.
- Distribution of resource amounts to budget details.
- Distribution of resource amounts across budget periods.
- Currency conversion.

Note. This feature uses the PeopleSoft Project Costing Budgeting functionality.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Budgeting Project Costs and Revenue."

Budget Generation Process Flow

You can create a detail budget plan in these ways:

- Manually, using the Project Budgeting pages.
- Using a Project Budget template.
- Copy from an existing budget plan.
- Load from resources defined on the Resources by Activity page.

This chapter discusses creating a detail budget plan from resources defined on the Resources by Activity page.

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If a project request is not required, you can manually create a project using the Project General component (PROJECT_GENERAL). If a project request is used, the funding manager may request a detailed budget plan for the project request. In this case, the funding manager sets the project request to a status of *Costing*, and the system generates a project.

Use the Resources by Activity page on the project to identify the projected resources for the project. This information includes both cost and revenue information for the projected resources.

After project managers identify the resources on the Resources by Activity page, they can create budget details using project the Budget Plan component (PC_BUD_GENERAL).

Budget Details Generation

After a project manager defines the resources needed in the Resources by Activity page, you can use the Get Plan feature to load the estimates into a budget plan. Use these steps to load resource estimates into a budget plan:

1. Create and save a budget plan for the project cost or revenue budgets.

   Set the status of the cost and revenue plan IDs to *Active*.

2. Click the Get Plan button on the appropriate Plan ID line to retrieve the resource cost or revenue estimates from the Resources by Activity page and initiate the Distribute Costs to Budgets Application Engine process (PGM_SPREAD).

   The plan ID line must have a status of *Active* to retrieve resource estimates. The project must have a processing status of *Pending,Active* or *Template* to retrieve resource estimates. The Get Plan feature does not process resource cost or revenue estimates from the Resources by Activity page that occur prior to the budget plan's start date.

   The Distribute Costs to Budgets process creates budget detail lines for each activity using the estimates defined in the Resources by Activity page.

3. Review the Distribute Activity Resource Amounts page if available, and update the information if necessary.

If you add or delete resources on the Resources by Activity page after you created a detail budget, depending on the results you want, you can:

- Inactivate the original budget plan, create a new active budget plan and then click the Get Plan button to initiate the Distribute Costs to Budgets process.
- Delete the original budget plan, create a new active budget plan and then click the Get Plan button to initiate the Distribute Costs to Budgets process.
- Append to the original budget plan by using the Get Plan button multiple times.

If the project is part of a program, you can roll project budget details up to the program budget.

See Chapter 12, "Budgeting for Programs," page 223.

Distribution of Activity Resource Amounts to Budget Details

The system uses these rules to determine how to distribute activity resource amounts:

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- If the project is associated with a project request, costs or revenue amounts from the Resources by Activity component are distributed to budget detail rows proportionately, based on the general ledger business unit and department IDs amounts defined on the Project Request - Costing page. In this case, the Distribute Activity Resource Amounts page does not appear when you click the Get Plan button, regardless of the Installation Options setting.
- If the project is not associated with a project request, and the *Allow Get Plan Distribution By Department* option is selected on the Installation Options - Project Costing page, the Distribute Activity Resource Amounts page appears.

  Users enter one or more general ledger business units, department IDs, and distribution percents for the system to use to distribute amounts from the Resources by Activity page to budget detail rows.

  The values you enter on the Distribute Activity Resource Amounts page override any general ledger business units and department IDs on the budget items entered on the Resources by Activity page.
- If the project is not associated with a project request, and the *Allow Get Plan Distribution By Department* option is not selected on the Installation Options - Project Costing page, amounts from the Resources by Activity component are distributed to budget detail rows using the ChartField values defined on the budget items.

When the Get Plan process distributes amounts from the Resources by Activity page according to the percentage distribution of the general ledger business unit and department ID combination, each row from the Resources by Activity page generates a separate budget detail row for each unique general ledger business unit and department ID combination.

If the general ledger business unit and department ID values are defined in the Budget Item ChartFields, they are overridden by the values from the Project Request - Costing page or Distribute Resource Activity Amounts page. All other ChartField values defined for the budget item are carried over to the budget detail row.

Note. If you select the Allow Get Plan Distribution By Department option on the Installation Options - Project Costing page, you must use the Distribute Activity Resource Amounts page to define the general ledger business unit and department ID when using the Get Plan feature for all projects that are not associated with a project request.

Distribution of Resource Amounts Across Budget Periods

After you generate separate budget detail rows from the Resources by Activity amounts, the Get Plan process distributes those values across budget periods in the budget plan. The system distributes the amounts using one of these methods:

- Even Spreading

  Even spreading occurs when the activity *Start Date* and activity *End Date* correspond to the first and last day of a defined budget period. The system divides the budget amount for each detail row by the total number of periods for the activity. The system then allocates this amount evenly across all of the periods for the activity.

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- Uneven Spreading

  Uneven spreading occurs when the activity Start Date and activity End Date do not begin and end on the first and last day of a defined budget period. The system divides the budget amount for each detail row by the total number of days in the activity duration. The system then allocates this amount to each period according to the number of days in that period.

Currency Conversion

You can enter activity amounts in different currencies. When you run the Distribute Costs to Budgets Application Engine process, the system generates and converts the budget detail amounts to the currency code specified for the budget plan.

Prerequisites

To enable users to choose the general ledger business unit and department ID for budget details rows, you must activate the Allow Get Plan Distribution by Department option on the Installation Options - Project Costing page.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Project Costing Integration Installation Options.

Entering Distribute Costs to Budget Detail Rows

This section discusses how to:

- Generate budget detail rows from activity resource amounts.
- Enter general ledger business unit and department values for budget details.

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Pages Used to Distribute Costs to Budget Detail Rows

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Options - Project Costing	INSTALLATION_PC	Set Up Financials/Supply Chain, Install, Installation Options, Project Costing	Enable users to choose the general ledger business unit and department ID distribution for budget detail rows. See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Project Costing Integration Installation Options.
Budget Plan	PC_BUD_GENERAL	Project Costing, Budgeting, Budget Plan, Budget Plan	Create and view all budget plans associated with a project, and initiate the Get Plan feature to populate budget detail rows.
Distribute Activity Resource Amounts	PGM_COST_PCT	Click the Get Plan button on the Budget Plan page when the Allow Get Plan Distribution by Department option on the Installation Options - Project Costing is enabled.	Enter general ledger business units, department IDs, and distribution percents for the system to use to distribute resource amounts to budget detail rows.
Budget Detail	PC_BUD_DETAIL	Click the Budget Detail icon on the Budget Plan page.	View budget detail rows that were created by the Get Plan feature.

Generating Budget Details from Activity Resource Amounts

Access the Budget Plan page.

Click the Get Plan button on an active budget plan row to launch the Distribute Costs to Budgets process. This process creates budget detail rows based on activity resource amounts. If the budget plan has a budget type of *Cost*, the system uses the cost amounts from the Resources by Activity page on the detail budget rows. If the budget plan has a budget type of *Revenue*, the system uses the bill amounts from the Resources by Activity page on the detail budget rows.

- If existing budget detail rows do not exist for the selection plan, the Distribute Costs to Budgets process creates new budget detail data.
- If existing budget detail rows exist for the selected plan, the Distribute Costs to Budgets process appends the cost data to the existing budget data.

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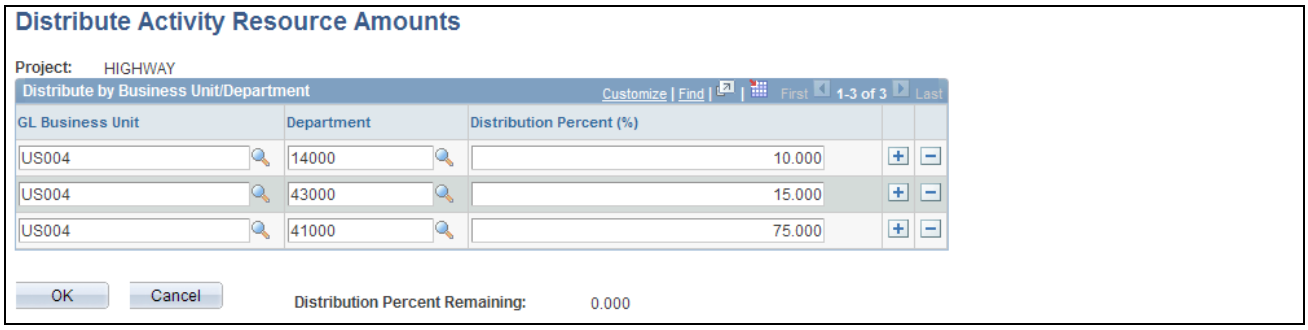
The Distribute Costs to Budgets process completes one of these actions:

- If the Allow Get Plan Distribution by Department installation option is activated, the Distribute Activity Resource Costs page appears.
- If the Allow Get Plan Distribution by Department installation option is *not* activated, the system creates budget detail rows for budget calendar periods for the general ledger business unit and department ID from the budget items that are entered on the Resources by Activity page.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Budgeting Project Costs and Revenue."

Entering General Ledger Business Unit and Department Values for Budget Details

Access the Distribute Activity Resource Amounts page (click the Get Plan button on the Budget Plan page when the Allow Get Plan Distribution by Department option on the Installation Options - Project Costing is enabled).



Distribute Activity Resource Amounts page

GL Business Unit (general ledger business unit) Enter the general ledger business unit to be used on budget detail lines for this project.

Department Enter the department ID to be used on budget detail lines for this project.

Distribution Percent (%) Enter the percentage for each general ledger business unit and department combination. The sum of the distribution percents must equal 100 percent.

Note. This page does not appear if the project is associated with a project request or if the Allow Get Plan Distribution by Department check box is not selected on the Installation Options - Project Costing page.

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Chapter 12

Budgeting for Programs

This chapter provides an overview of program budgeting and discusses how to:

- Create program budgets.
- Create program budget details.
- Spread budget detail amounts across periods.
- Approve program budgets.
- View program budget status history
- Analyze program budgets.

Understanding Program Budgeting

This section lists a prerequisite and discusses:

- Program budget workflow.
- Program budget plan versions.
- Program budget detail generation.
- Budget estimating across program periods.
- Program budget and project budget comparisons.

Prerequisite

To use program budgeting workflow, you must enable program budget approval on the Installation Options - Program Management page.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Program Management Installation Options.

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Program Budget Workflow

Program budget workflow enables you to require approval before a program budget can be used. By using program budgeting workflow, when you create a program, the system verifies that a budget approver is assigned to the program. The budget approver that you assign on the Project General - Program Management page appears on the Program Budget page.

When budget plans are ready for approval, users select the appropriate plan on the Program Budget page and submit it for approval. If a budget approver has not been defined, you cannot submit the program budget for approval.

After you submit a program budget for approval, the system sends a worklist item and email notification to the budget approver.

If the approver approves the budget, the system sends an email notification to the requester to indicate that the budget has been approved and sets the budget plan to a status of *Active.*

If the approver returns the budget, the system sends an email notification to the requester to indicate that the budget has been returned and sets the budget plan to a status of *Returned.*

Note. The email address for the budget approver is taken from the budget approver's user ID on the PeopleTools, Security, User Profiles, User Profiles, Email Addresses page.

Program Budget Plan Versions

You can use program budgets as a top-down funding mechanism for the projects that are the actual delivery vehicle. You can compare these budgets to the rolled up version of the individual project budgets, actual amounts, and forecasts.

You can define multiple versions of cost and revenue budgets at the program level. You can designate only one version as the baseline plan, and only one version as an active plan. You can delete program budget plans. Additionally, you can require approval of a version before it becomes active.

Program Budget Detail Generation

You can create program budget details using any of these methods:

- Enter a high-level estimate and distribute it to budget items and periods.
- Roll up child program or project budgets based on the enterprise program tree.
- Copy another budget plan version from the same program.
- Import from a Microsoft Excel comma delimited file.

This diagram shows the options for creating program budget details for a program budget version:

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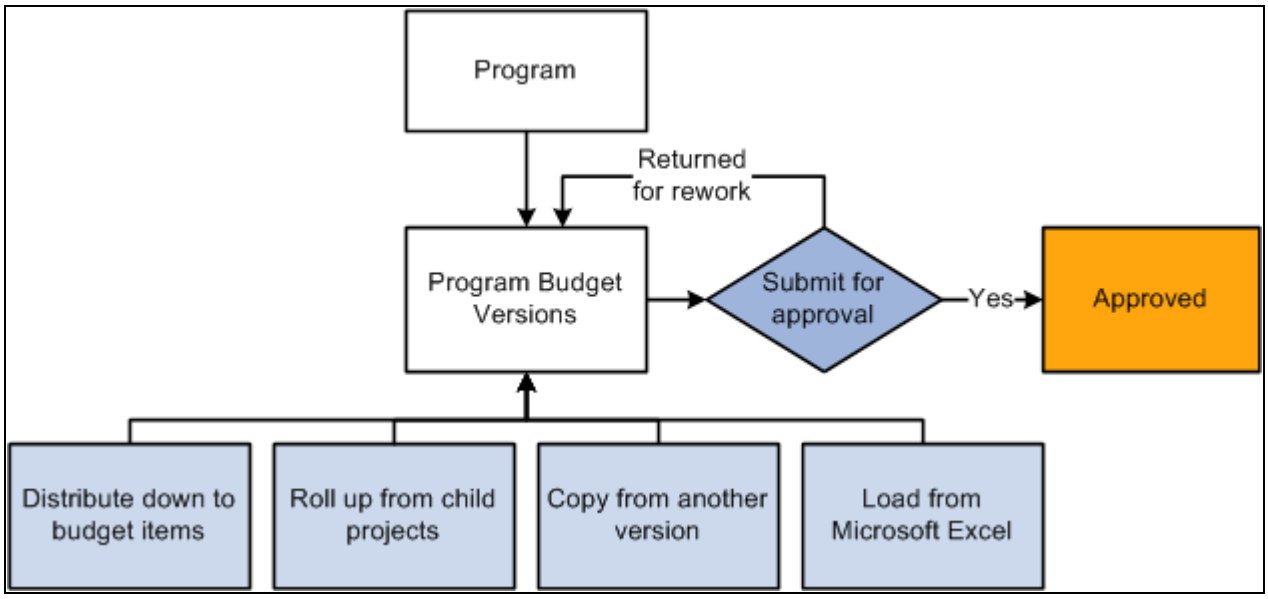

Program budgeting process flow

Budget Estimating Across Program Periods

You have several options for spreading budget estimate amounts across periods. When you create budget details by using the Load from Excel, Project Rollup, or Copy from Plan methods, the system populates the budget periods if they are defined in the source.

If you create budget details by using the Distribute Budget Items method and enter budget estimate amounts, use any of these methods to spread the estimated amount across the program periods:

- Manually enter amounts into each period in the grid.
- Divide the budget estimate evenly across all periods by clicking the Spread button.
- Calculate period amounts based on quantity by clicking the Calculate link.

Note. The periods total on the Program Budget Detail page may not be the same as the budget estimate amount. The budget estimate amount is a starting point for determining the period-by-period budget details. The system uses only the amounts defined in the individual budget periods for all reporting and analysis.

Program Budget and Project Budget Comparisons

This table shows, at a high level, the differences between program and project budgets:

Feature	*Project Budget*	*Program Budget*
Finalize: Writing budget rows from the project budgeting tables to the project transaction table.	Yes	No

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Feature	Project Budget	Program Budget
Baseline: Identifying a budget plan as the baseline plan.	No	Yes
Approval: Enabling workflow so that budget plans must be approved by budget approvers.	No	Yes
Budget Type: Creating both cost and revenue budgets.	Yes	Yes

Creating Program Budgets

This section discusses how to:

- Create program budget plans.
- Associate attachments with program budgets.

Pages Used to Create Program Budgets

Page Name	Definition Name	Navigation	Usage
Program Management	PROJECT_GEN_02	Program Management, Project Definitions, General Information, Program Management	Assign the program budget approver. See Chapter 7, "Managing Programs and Projects," Establishing and Maintaining Programs and Projects, page 77.
Program Budget	PGM_BUD_PLAN	Program Management, Program Budgeting, Program Budget Plan	Enter or view cost and revenue budget versions at the program level.
Attachments	PGM_BUD_ATTACH	Program Management, Program Budgeting, Program Budget Plan, Attachments	Attach reference documents associated with a program budget.
Program Budget Plan - Comments	PGM_BUD_COM_SEC	Click the comments icon on the Program Budget Plan page.	Enter comments about the program budget plan.

Creating Program Budget Plans

Access the Program Budget page (Program Management, Program Budgeting, Program Budget Plan).

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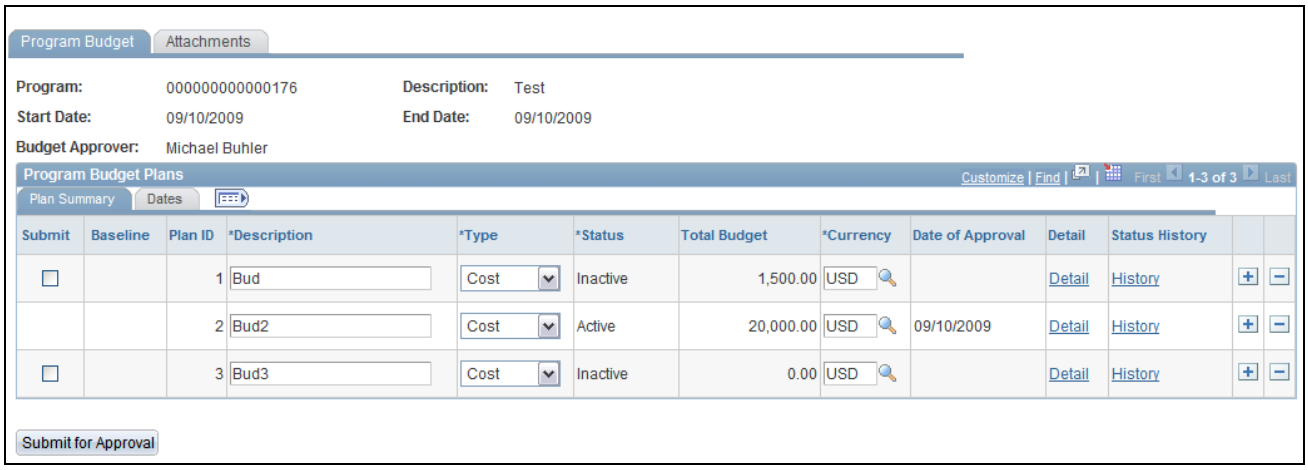

Program Budget page

Budget Approver Displays the person responsible for approving a program budget. The name in this field appears by default from the Project General - Program Management page. This field is display-only. This field appears only if program budget workflow is enabled at the installation level.

Submit for Approval Click to trigger workflow when a budget plan is ready for approval. You must select the appropriate plan in the Submit column before you submit the budget plan for approval. The system creates a worklist item and sends an email notification to the budget approver. This field appears only if program budget workflow is enabled. If a budget approver is not defined for a program, this field is disabled.

Note. A program must be on an enterprise program tree before you can create a budget plan for it.

Program Budget Plans - Plan Summary

This tab displays summary budget plan information

Submit Select to indicate which row to submit for program budget plan approval. This column appears only when program budgeting workflow is enabled.

Baseline Indicates which plan is currently marked as the baseline. Click the Baseline button on the Date tab to select this option. One cost budget plan and one revenue budget plan may be designated as the baseline.

Plan ID Displays a unique version of the program budget. The system automatically numbers this display-only field.

Type Select *Cost* or *Revenue* to identify whether the budget plan is for cost or revenue amounts.

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Status	Displays the status of the budget. Only one cost budget plan and one revenue budget plan can be active at one time. If program budget workflow is enabled, this field is display-only. If program budget workflow is not enabled, you can select *Active* or *Inactive.*
Total Budget	Displays the total budget entered for the budget plan. The system derives this value from the budget details associated with the plan, and this field is display-only.
Date of Approval	Display the date that the budget plan was approved. This field is display-only and appears only if program budget workflow is enabled.
Detail	Click to access the budget details for the associated budget plan. This link does not appear until you enter a description on the plan line and save.
History	Click to access the status history page for the associated budget plan. This link appears only if program budget workflow is enabled.

Program Budget Plans - Dates

This tab displays information about the time period covered by the budget.

Calendar	Enter the budget calendar to use when creating program budget details for the budget plan. The value appears by default from the Installation Options - Project Costing page. You can overwrite the value any time before you create budget details. The calendar that you enter must have enough future periods defined to cover the periods that you specify in the Periods field.
Start Date	Enter the budget start date. This value appears by default from the program start date.
Periods	Enter the number of periods for which you will create budget details.
Baseline Date	Displays the date on which the budget plan was designated as baseline.
Baseline	Click the Baseline button to mark the plan as the baseline plan. This button is available only for active budget plans.
	Click to display a secondary page where you can add comments about the budget plan. For example, users may add comments to explain why a new version of the budget is needed or to explain major changes to the budget.

Associating Attachments with Program Budgets

Access the Attachments page (Program Management, Program Budgeting, Program Budget Plan, Attachments).

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

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Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

Creating Program Budget Details

This section discusses how to:

- Create program budget details.
- Create budget details by distributing budget items.
- Create budget details by loading from a Microsoft Excel spreadsheet.
- Create budget details by rolling up child program or project budgets.
- Create budget details by copying another budget plan.

Pages Used to Create Program Budget Details

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Budget Detail	PGM_BUD_DETAIL	Program Management, Program Budgeting, Program Budget Detail	View and define budget details and distribute budget estimates across periods.
Program Budget Detail - Distribute Budget Items	PGM_BUD_ITEM_SEC	• Select the *Distribute Budget Items* option in the Create Budget From field and click GO. • Click the Distribute Budget Items link that appears before the Budget Details grid on the Program Budget Detail page. This link appears only if there is at least one budget detail row.	Enter budget items and budget estimate amounts.
Load From Excel	PGM_BUD_EXCEL	Select the *Load from Excel* option in the Create Budget From field and click GO.	Select a Microsoft Excel spreadsheet to import budget details, and load the details into a budget plan.

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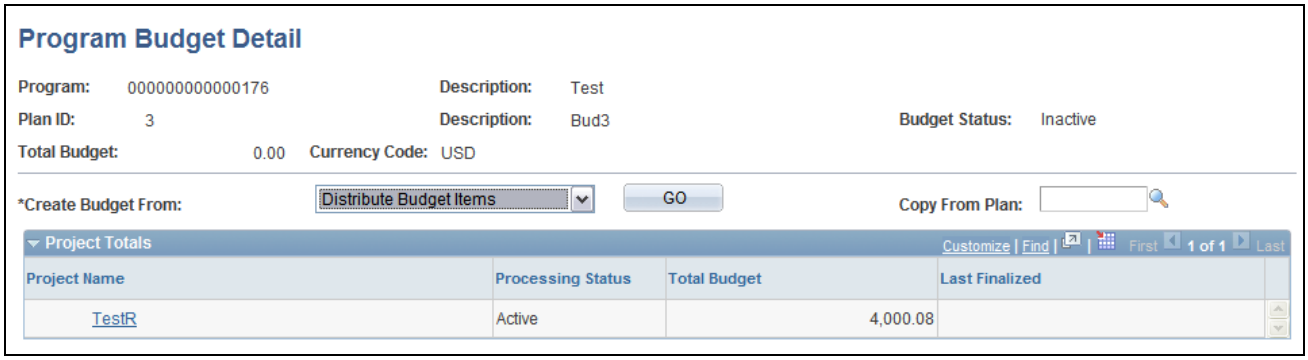
Creating Program Budget Details

Access the Program Budget Detail page (Program Management, Program Budgeting, Program Budget Detail).



Program Budget Detail page

The system determines the number of periods to display in the Budget Details section based on the calendar periods per year. If the number of periods per year is less than or equal to 26 then the system displays the number of periods in the calendar year. If the number of periods per year is 52, then the system displays 26 periods. For any other number of periods per year, the system displays 15 periods.

Total Budget Displays the total budget amount for all budget periods for all of the budget items. The total appears after you spread the budgets across the periods.

Create Budget From Select a method to create program budget details. Options are:

Distribute Budget Items: Select to enter a high-level estimate and distribute it to budget items and periods.

Load From Excel: Select to import program budget details from a Microsoft Excel comma delimited file.

Project Rollup: Select to create program budget details from child program or project budgets based on the enterprise program tree.

GO Click to create budget details using the method that you selected in the Create Budget From field.

Copy From Plan Enter a plan ID. After you enter a plan ID, the GO button appears to the right of the Copy From Plan field. Click this GO button to create budget details from another budget plan version from the same program.

Project Totals

This grid displays the totals that the system will roll up to the budget detail if you select to create budget details using the *Project Rollup* option.

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Project Name Lists all projects or programs on the enterprise program tree that are subordinate to the program for which you are creating the budget. Click a *<program name>*to transfer to the Program Budget Detail page if a budget plan exists. If a budget plan does not exist, the system transfers you to the Program Budget page. Click a *<project name>*to access the project Budget Details page (PC_BUD_DETAIL) for that project if a budget plan exists. If a budget plan does not exist, the system transfers you to the project Budget Plan page (PC_BUD_GENERAL).

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Budgeting Project Costs and Revenue," Creating and Defining Budget Plans.

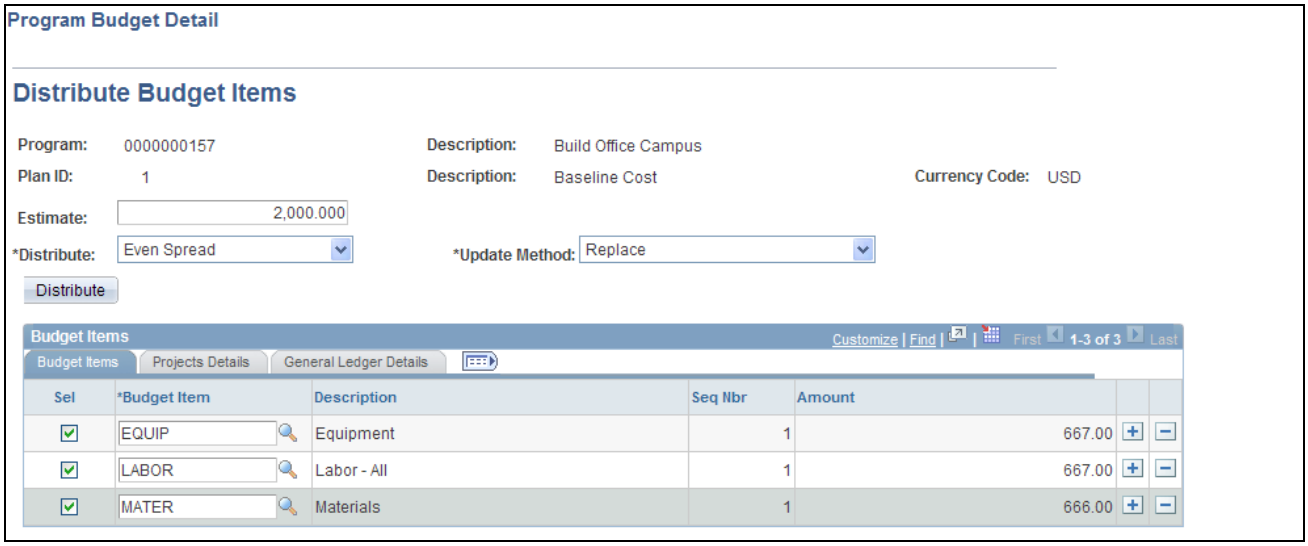
Processing Status Displays the processing status of the project or program budget.

Total Budget Displays the total budget amount for the program or project if a budget was defined for the program or project.

Last Finalized Displays the last finalized date if the project budget was finalized.

Creating Budget Details by Distributing Budget Items

Access the Program Budget Detail - Distribute Budget Items page (click the Distribute Budget Items link on the Program Budget Detail page).



Program Budget Detail - Distribute Budget Items page

The appearance of this page is specific to the distribution method that you select in the Distribute field.

Estimate Enter the total estimated budget amount for the budget items in the Budget Items grid.

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Distribute Select the method you want to use to distribute the estimated budget amount to the budget items defined in the Budget Items grid. Options are:

Even Spread: Select to automatically divide the estimated amount evenly across all selected budget items defined in the Budget Items grid.

Manual Entry: Select to open up the Amount field for each budget item in the Budget Items grid. Then, manually enter individual budget amounts for each budget item.

Percentage Spread: Select to display a percentage column in the Budget Items grid. Enter the percentage of the estimated amount you want to allocate to each selected budget item. The total percentage amount must equal 100.

Repeat: Select to apply the full estimated amount to each selected budget item defined in the Budget Items grid.

Update Method Select the method by which to update the estimate distribution. Options are:

Add To/Subtract From: Select to increment or decrement the existing budget with the estimate being distributed. Positive amounts increment the budget, and negative amounts decrement the budget.

Replace: Select to replace the existing budget with the estimate being distributed.

This field appears only if budget details exist.

Distribute Click the Distribute button to distribute the estimated budget amount to the budget items selected in the Budget Items grid according to the distribution method you chose.

Budget Items - Budget Items

Use the Budget Items grid to list all of the budget items to which you want to allocate budget amounts for the budget plan ID selected.

Sel (select) Select the budget items that you want to include in the calculations when you click the Distribute button. You can enter a new amount in the Estimate field, select different budget items, and click the Distribute button to repeat the process of allocating estimated budget amounts.

Budget Item Select the budget items that define the budget details for the selected budget plan ID. The budget item definition includes the ChartField values. These values appear by default on the Project Details tab and General Ledger Details tab when you select a budget item.

Seq Nbr (sequence number) Displays the sequence number which identifies the number of occurrences of a specific budget item entered in the Budget Items grid. You can add the same budget item multiple times.

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Amount Displays the total budget amount for the budget item. You can distribute this amount across the periods of the project by returning to the Budget Details page. This field appears only when you select *Manual Entry* in the Distribute field. When any other distribution method is chosen, the value is calculated by the system and the field is protected.

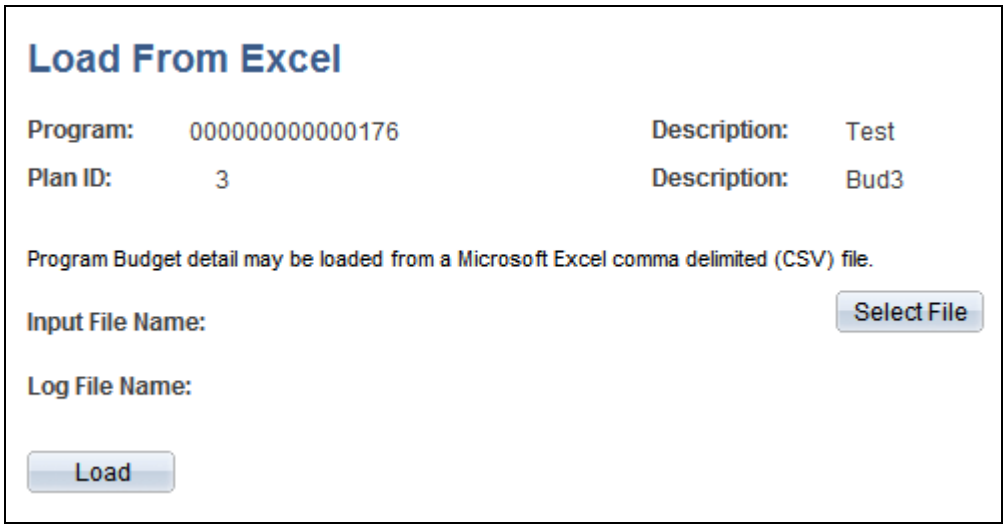
Percentage Enter the percent value for each budget item. The total percentage for all of the budget items must equal 100. This column appears only when you select *Percentage Spread* in the Distribute field.

Budget Items - Project Details and General Ledger Details

The Project Details tab and General Ledger Details tab display project-related and general ledger ChartFields. The values appear by default from the budget item definition, and can be overridden on this page.

Creating Budget Details by Loading from a Microsoft Excel Spreadsheet

Access the Load From Excel page (select the *Load from Excel* option in the Create Budget From field on the Project Budget Detail page and click GO).



Load From Excel page

Input File Name Displays the name of the file that is to be loaded. The file must be a Microsoft Excel, comma delimited file (CSV). Each row should contain budget item, period 1 amount, period 2 amount, and so on, depending on the number of periods defined for the budget plan. The filename appears after you click the Select File button.

Select File Click the Select File button to search for and select the Microsoft Excel CSV input file.

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Log File Name Displays the name of the output text file that contains the results of the load process, including errors, warnings, and total number of rows processed. The system generates this file when you click the Load button, even if there are no errors. The file appears as a link and, when clicked, the system opens the file for viewing in a new window.

Load Click to launch the Load Budget from Excel (PGM_BUD_EXL) application engine online process. This process edits the file for errors and creates budget detail rows.

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for the Load from Excel process to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

Creating Budget Details by Rolling Up Child Program or Project Budgets

Access the Program Budget Detail page (Program Management, Program Budgeting, Program Budget Detail).

When a program has child projects or child programs, and those projects or programs have budgets, you can roll up all of the child budgets, including period detail, to create the overall program budget. To do this, select *Project Rollup* in the Create Budget From field, and click the GO button.

Note. Summarization is performed by budget item and period. You can create a program budget from a rollup of child project budgets only if all of the active child project budgets are created with the same budget calendar as defined for the program Budget. The system cannot sum period data if each project has a different definition of a period. In addition, the system will not sum the quantities from the child project budgets.

Creating Budget Details by Copying Another Budget Plan

Access the Program Budget Detail page (Program Management, Program Budgeting, Program Budget Detail).

Use the Copy From Plan feature when you want to create another version of an existing budget plan for the same program.

Copy From Plan Enter the plan ID of another plan with budget details defined for the same program.

GO Click to copy the selected plan into the current plan. This button appears only when you enter a value in the Copy From Plan field.

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Spreading Budget Detail Amounts Across Periods

This section discusses how to:

- Spread budget item estimates across periods.
- Calculate budget period amounts based on quantity.

Pages Used to Spread Budget Detail Amounts Across Periods

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Budget Detail	PGM_BUD_DETAIL	Program Management, Program Budgeting, Program Budget Detail	View and define budget details, and distribute budget estimates across periods.
Program Budget Detail - Calculate Period Amounts	PGM_BUD_PER_SEC	Click the Calculate link on the Budget Detail page.	Calculate period budget amounts for budget items with a labor resource class.

Spreading Budget Item Estimates Across Periods

Access the Program Budget Detail page (Program Management, Program Budgeting, Program Budget Detail).

Enter budget estimate amounts and distribute the budget amounts across the periods of the program.

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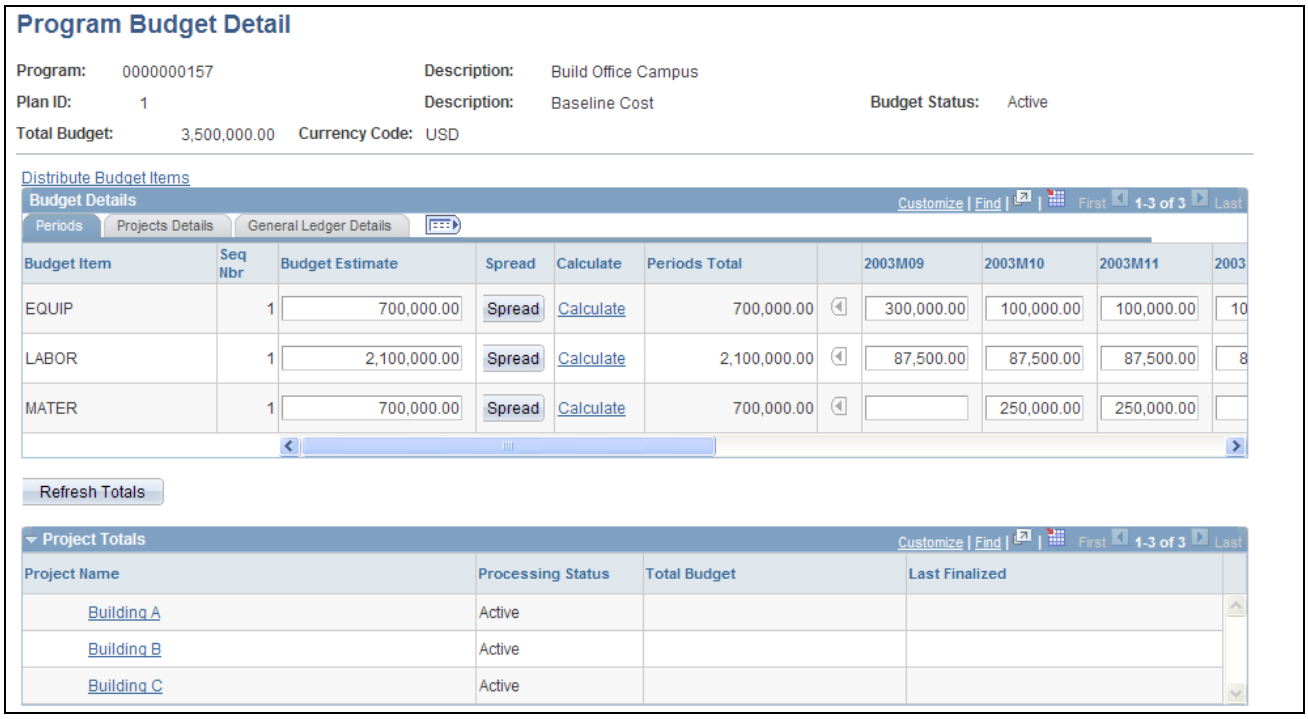

Program Budget Detail page

Distribute Budget Items Click to access the Program Budget Detail - Distribute Budget Items page, where you can add budget items and change the distribution method.

Budget Details

This grid appears after you distribute budget estimates to budget items, load the budget from Microsoft Excel, roll up the budget from child program or project budgets, or copy from an existing budget plan.

Budget Item Displays the budget items that you entered on the Distribute Budget Items page brought in from Excel or project rollup, or copied from another plan.

Seq Nbr (sequence number) Displays the sequence number which identifies the number of occurrences of a specific budget item. You can add the same budget item multiple times.

Budget Estimate Enter a budget estimate for each budget item. The system populates this field when you use the Distribute Budget Items process. It is left blank when you use the Load from Excel, Project Rollup, and Copy From Plan options.

Spread Click to automatically spread the budget estimate evenly across all program periods.

Calculate Click to access the Calculate Period Amounts page. This link appears only for budget items with a labor resource class or no resource class.

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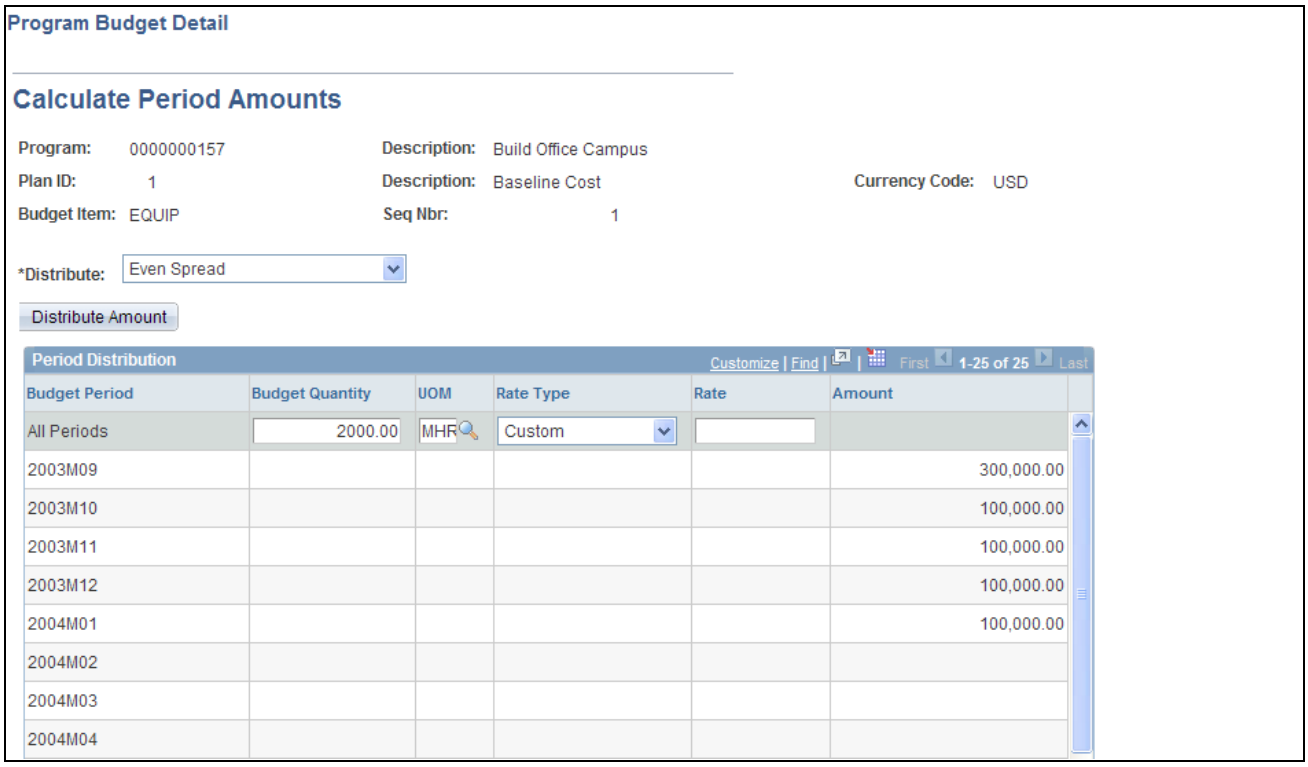
Periods Total Displays the total budget amount for all budget periods for each budget item.

Important! The periods total may not equal the value in the Budget Estimate field. The budget estimate amount is used only as a starting point.

<Budget Period> Enter a budget amount for the budget period, or automatically populate the field using by using the Spread button or Calculate link. A column appears for each budget period in the program.

Calculating Budget Period Amounts Based on Quantity

Access the Program Budget Detail - Calculate Period Amounts page (click the Calculate link on the Budget Detail page).



Program Budget Detail - Calculate Period Amounts page

When you first access this page, you can enter information only in the All Periods row. Use this row to calculate a budget amount for all periods. Then, use a distribution method to distribute the amount across periods.

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Distribute Select the method you want to use to distribute the calculated amount to the budget periods. Options are:

Even Spread: Select to automatically divide the amount in the All Periods row evenly across all budget periods.

Repeat Amount: Select to apply the full amount in the All Periods row to each budget period.

Percentage Spread: Select to display the Percentage column in the Period Distribution grid. Enter the percentage of the amount in the All Periods row you want to allocate to each budget period. The total percentage amount must equal 100.

Manual Entry: Select to open up the Quantity,Rate, and Amount fields for each budget period in the Period Distribution grid. You can then enter individual budget amounts manually for each budget period or perform quantity times rate calculations for individual periods. The All Periods row is hidden when this option is selected.

Distribute Amount Click to populate the amount column based on the distribution method chosen.

Period Distribution

Use this grid to define the amounts to distribute by using the Distribute Amount button or to manually calculate budget amounts for each period.

Budget Period Displays the budget periods. The system automatically calculates all budget periods for the program and displays them here.

Budget Quantity Displays the number of hours or days budgeted. This number is not stored in the budget rows. It is used only to calculate the period amount.

UOM(unit of measure) Select a unit of measure:

MDY (Person Day)

MHR (Work Hour)

Available unit of measure values are specified on the Project Costing Options page.

Rate Type Select a rate type from these options:

Custom: Select to manually enter the rate.

Project Role: Select to use the rate associated with a project role.

Job Code: Select to use the rate associated with a job code.

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Rate Enter or select a rate. Available values are based on the rate type:

For a *Custom* rate type, enter a free form rate.

For a *Project Role* rate type, select from the prompt that shows all rates by project role.

For a *Job Code* rate type, select from the prompt that shows all rates by job code.

Approving Program Budgets

This section discusses how to approve program budgets:

Pages Used to Approve Program Budgets

Page Name	*Definition Name*	*Navigation*	*Usage*
Worklist for <User ID>: <Resource>	WORKLIST	• Worklist, Worklist, Worklist for <User ID>: <Resource> • Click Worklist from the PeopleSoft universal navigation header.	Access the Budget Approval work item.
Program Budget Approval	PGM_BUD_APPROVE	Click the link that is associated with the Budget Approval work item from the Worklist for <User ID>: <Resource> page. The link is a concatenation of the business unit, program ID, and budget plan ID.	Approve or return a submitted program budget plan.

Approving Program Budgets

Access the Program Budget Approval page (click the link that is associated with the Budget Approval work item from the Worklist for <User ID>: <Resource> page).

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Program Budget Approval page

Click Approve to approve the budget plan. Click Return to return the plan to the requester without approving it. You can enter comments to explain the approver's action. You can view the comments on the Program Budget Status History page.

Viewing Program Budget Status History

This section discusses how to view the program budget status history.

Page Used to View Program Budget Status History

Page Name	*Definition Name*	*Navigation*	*Usage*
Program Budget Status History	PGM_BUD_AUD_SEC	Select the History link on the Program Budget Plan page.	Review the approval history of the program budget plan and view or add comments.

Viewing the Program Budget Status History

Access the Program Budget Status History page (select the History link on the Program Budget Plan page).

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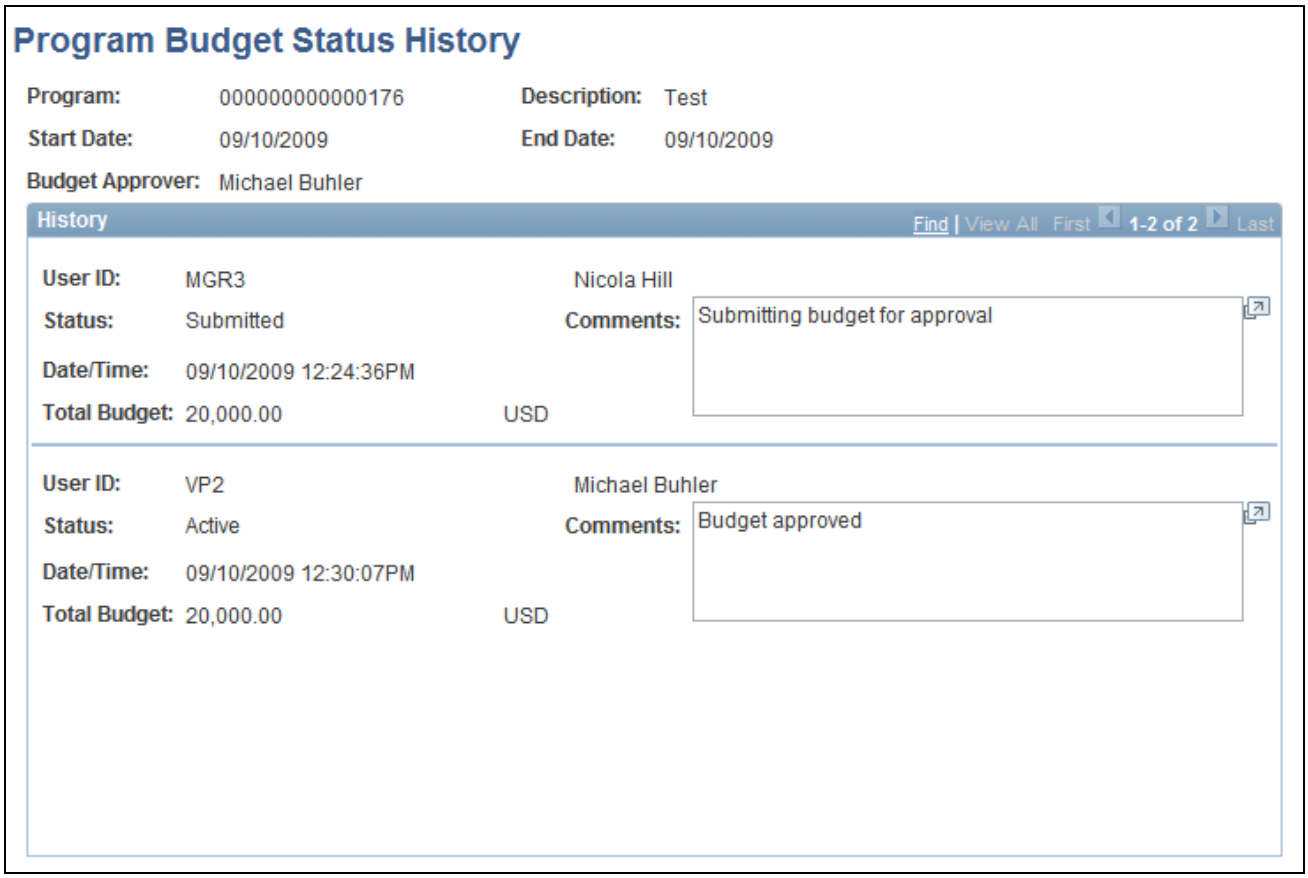

Program Budget Status History page

Analyzing Program Budgets

This section provides an overview of program budget analytics and discusses how to:

- View the program budget analysis.
- Compare project request estimates to cost budgets.

Understanding Program Budget Analytics

Use program budget analytics to compare the program budget with program actual, program estimate to complete, and program baseline budget amounts.

Note. Program budgeting analytics report against only cost budgets.

Program budget analysis inquiry is built using PeopleSoft Analytic Calculation Engine (ACE). PeopleSoft ACE is a tool for developing and administering analytic models, which calculate and send data to PeopleSoft applications for the purposes of multidimensional reporting, analysis, and data entry.

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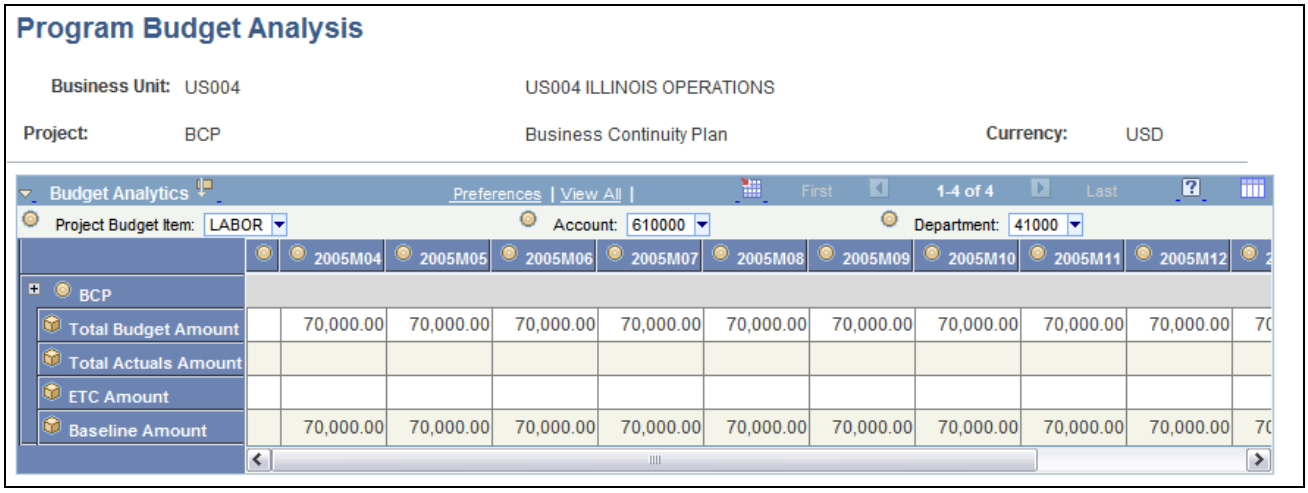
See "Configuring and Starting Analytic Servers" in *PeopleTools PeopleBook: System and Server Administration.*

Pages Used to Analyze Program Budgets

Page Name	Definition Name	Navigation	Usage
Program Budget Analysis	PGM_BUD_ANALYSIS	• Program Management, Program Budgeting, Program Budget Analysis, Program Budget Analysis • Program Management, Program Tools, Review Program, Review Program Click the Program Budget Analysis link.	Analyze program cost budget versus actual amounts, estimate to complete, and the baseline budget.
Project Request Analysis	PGM_PRJRQ_ANALYSIS	Program Management, Program Budgeting, Project Request Analysis, Project Request Analysis	Compare the project request estimate to the associated program or project budget.

Viewing the Program Budget Analysis

Access the Program Budget Analysis page (Program Management, Program Budgeting, Program Budget Analysis, Program Budget Analysis).



Program Budget Analysis page

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Selection Criteria

Select values for the fields on the slicer bar to filter the information that appears on the analysis page.

Department	Select a value to limit the report to a specific department.
Project Budget Item	Select a value to limit the report to a specific budget item.
Account	Select a value to limit the report to a specific account.

Data Grid

The analysis grid displays data for the program and each child program or project that is associated with the program. The budget periods are based on the program budget calendar.

Total Budget Amount	Displays the budget amounts for the active program budget. If the selected program does not have an active budget, the child projects and programs under the selected program appear individually. The total budget values for the child projects and programs are also rolled up to display a program total.
Total Actuals Amount	Displays the actuals amounts from the projects that comprise the program. The individual project amounts are rolled up to display a program total amount. The accounting date on the project transactions is used to determine the budget period in which the amount is displayed. The Actual Cost analysis group defined at the project level is used to determine the transactions used to derive this total.
ETC Amount (estimate to complete amount)	Displays the estimate to complete amounts for the projects that comprise the program. The individual project amounts are rolled up to display a program total amount. The accounting date on the estimate to complete transactions is used to determine the budget period in which the amount is displayed. The system uses the Cost Estimate to Complete analysis group defined on the Installation Options - Project Costing Integration page to determine the transactions to use to derive this total.
Baseline Amount	Displays the baseline budget for the program if one is defined.

Comparing Project Request Estimates to Cost Budgets

Access the Project Request Analysis page (Program Management, Program Budgeting, Project Request Analysis, Project Request Analysis).

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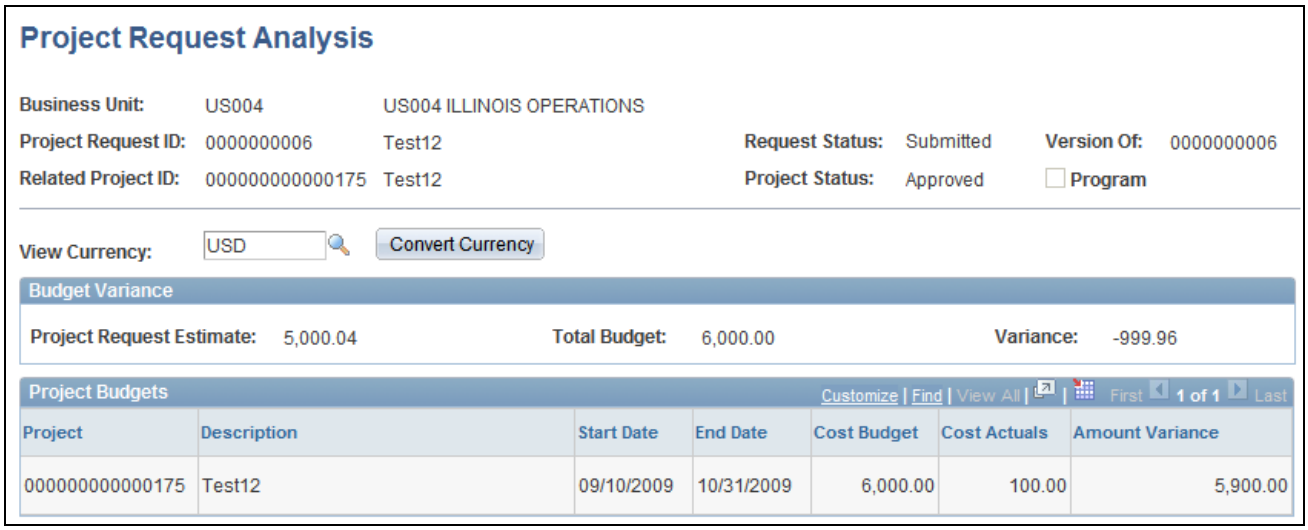

Project Request Analysis page

Project Request ID Displays the project request ID of the project whose business case estimate is compared to the program or project budget.

Request Status Displays the current status of the project request.

Version Of Displays the version of the project request.

Related Project ID Displays the project identifier for the corresponding project request.

Program Indicates whether the project is a program. If the box is selected, the project is a program.

View Currency Enter the currency in which to view the budget variance, cost budget, and cost actuals. You must click the Convert Currency button to change the amounts. The default value is the project business unit currency.

Convert Currency Click to restate all of the budget amounts in the currency that you specified in the View Currency field.

Budget Variance

Project Request Estimate Displays the total estimated cost from the Project Request page

Total Budget Displays the total active program or project budget. If a program has an active budget and the child projects under it have active budgets, then the program budget is the total budget. If the program does not have an active budget, and the child projects under it have active budgets, then the total budget is the roll up of the active child project budgets under the program.

Variance Displays the difference between the project request estimate and total budget.

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Program Budgets

Project Name	Displays the child program or project descriptions.
Cost Budget	Displays the active program or project budget.
Cost Actuals	Displays the actual costs for the projects under the program.
Amount Variance	Displays the difference between the cost budget and cost actuals amounts.

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Chapter 13

Managing Program and Project Issues

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

- Enter issues.
- Review, update, and resolve issues.
- Generate issue reports.
- Send email notifications.

Understanding Issues

This section provides and overview of program and project issues and discusses:

- Prerequisites
- Issue management workflow

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.

Prerequisites

You must define issue priorities, statuses, and types before you can create a program or project issue.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Setting Up General Control Data, page 32.

Issue Management Workflow

Project managers, resources, and other users become involved entering, assigning, updating, and resolving issues. You can enable workflow to keep all parties notified throughout the life cycle of an issue. You specify issue management workflow options on the Installation Options - Program Management page during implementation. The three types of issue management workflow are:

- Create Issue Notification workflow
- Assign Issue Notification workflow

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- Update Issue Notification workflow

Create Issue Notification Workflow

If a user submits an issue, the system creates a worklist item and sends an email notification to the issue owner indicating that an issue has been raised. Typically, the issue owner is responsible for assigning the issue to a resource.

Note. If there is no issue owner, the system cannot trigger workflow and a warning message appears.

Assign Issue Notification Workflow

When you assign an issue to a resource, a message box gives you an option to trigger Assign Issue Notification workflow. If you select *Yes,* the system creates a worklist item and sends an email notification to the assigned resource. You can trigger Assign Issue Notification workflow every time you change the assigned resource. The system creates worklist entries and sends email notifications to both the previous and newly assigned resources.

Update Issue Notification Workflow

During installation, you can select the fields on an issue that, if changed, trigger a notification workflow to all interested parties. For example, you can activate Update Issue Notification workflow for issue status, but not for issue priority. The interested parties are notified if the status of an issue changes for any reason; however, they are not notified if the issue priority changes.

You can select any of these fields to trigger Update Issue Notification workflow to interested parties:

- Issue Summary
- Issue Description
- Issue Priority
- Issue Status
- Resolution Description
- Actual Resolution Date
- Issue Notes
- Issue Attachments

See *PeopleSoft Application Fundamentals 9.1 PeopleBook,* "Setting Installation Options for PeopleSoft Applications," Defining Program Management Installation Options.

Entering Issues

This section discusses how to:

- Create project issues.

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- Work with issue notes and attachments.
- Work with interested parties.
- View issue history.

Pages Used to Enter Issues

Page Name	*Definition Name*	*Navigation*	*Usage*
Issue	PC_IM_ISSUE	Program Management, Project Management, Add/Update Issues, Issue	Create, review, or edit issue information.
Issue - 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.
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 about changes to a particular issue.
Issue - History	PC_IM_HISTORY	Program Management, Project Management, Add/Update Issues, History	View the record of updates that are made to a particular issue.

Creating Program and Project Issues

Access the Issue page (Program Management, Project Management, Add/Update Issues, Issue).

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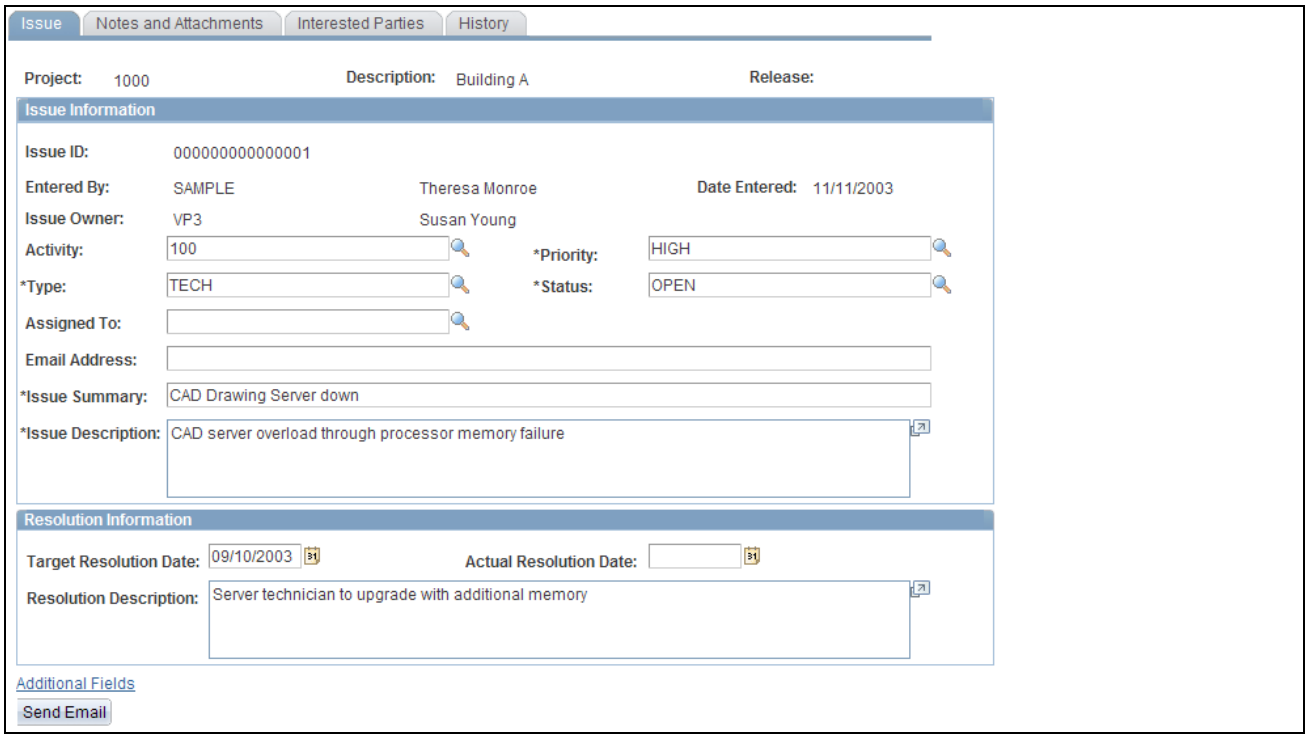

Issue page

You define values for issue priority, type, and status during implementation.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Setting Up General Control Data, page 32.

Issue Owner Displays the issue owner. The default value is the activity owner, project manager, or program manager. If the issue is for an activity and there is no activity owner, the issue owner is the project manager. If there is no project manager for that project, the issue owner is the program manager. If there is no activity owner, project manager, or program manager, the issue owner is blank.

Activity Enter the project activity for which you are entering the issue.

Note. This fields does not appear if you are entering an issue for a program.

Assigned To Select an employee ID or enter a name. For project issues, you can assign the issue only to employees who are members of the project team. For program issues, you can assign the issue only to employees who are team members of the projects under the program.

Email Address Displays the email address for the assigned resource. The system obtains the email address from the Resource Detail page for that employee. If there is no email address for the employee on the Resource Detail page, the email address of the user ID that is associated with the employee appears in the field. If there is no email address available, you must enter an email address before you can save the issue.

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Target Resolution Date	Enter the target date for resolving the issue.
Actual Resolution Date	Enter the date that the issue is resolved.
Additional Fields	Click to access the Issue Additional Fields page and enter additional information. The fields on the Issue Additional Fields page are user-defined fields for informational purposes only.
Send Email	Click to access the Issue Management - Send Email page, where you can compose and send email notifications that pertain to this specific issue.
Save	Click to save the issue and add the issue originator and assigned resource to the Interested Parties page. If you assigned a resource to the issue, and Enable Issue Management Workflow option is activated on the Installation Options - Program Management page, a message box appears to verify that you want to trigger workflow to notify the assigned resource. Click *Yes* to trigger workflow and return to the Issue page.
Submit	Click to add the issue owner to the Interested Parties page, and trigger the system to create a worklist item and send an email to the issue owner. The system uses the email address of the owner's user ID from the Operator Definition table (PSOPRDEFN). The Submit button appears when you save the issue if the Enable Issue Management Workflow option is activated on the Installation Options - Program Management page. The button disappears after you submit the issue and trigger workflow. If the issue owner creates the issue, the Submit button does not appear.

See Also

Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Setting Up General Control Data, page 32

Working with Issue Notes and Attachments

Access the Issue - Notes and Attachments page (Program Management, Project Management, Add/Update Issues, Notes and Attachments).

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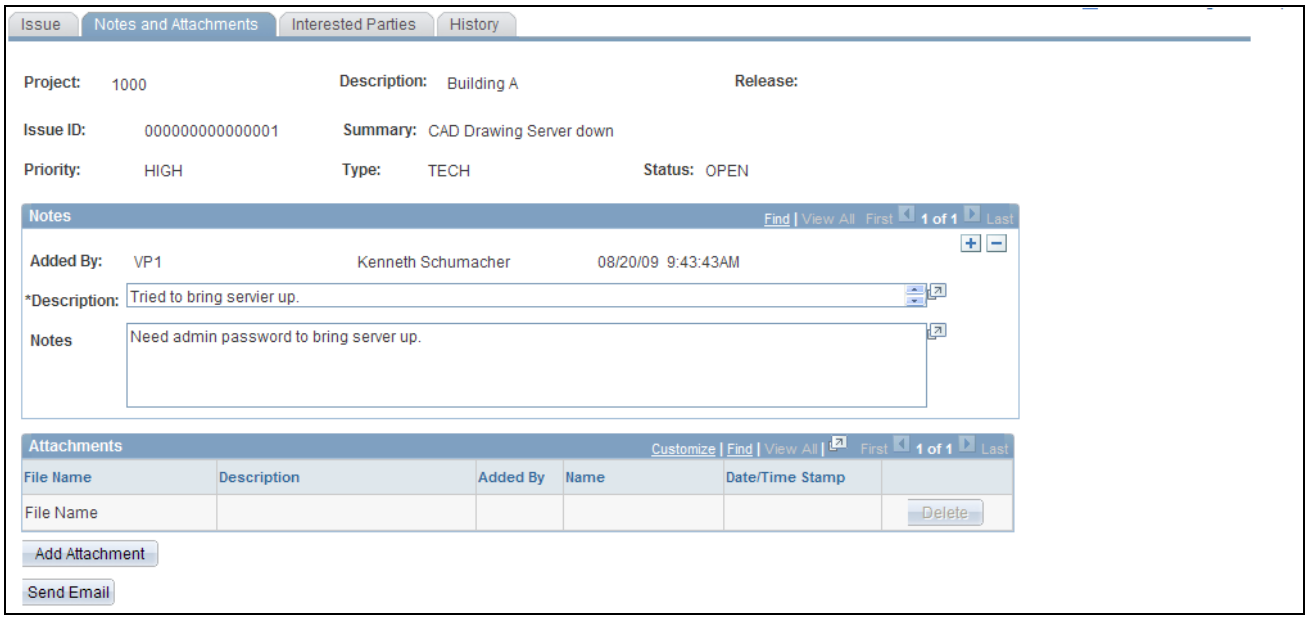

Issue - Notes and Attachments page

Description and **Notes** Enter the description and notes for the issue.

Add Attachment Click the button beneath the Attachments grid to add an attachment.

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

File Name Displays the name of the file that you upload.

Added By, Name, and **Date/Time Stamp** Displays information about the user who adds the attachment, and the date and time that the upload occurred.

Working with Interested Parties

Access the Issue - Interested Parties page (Program Management, Project Management, Add/Update Issues, Interested Parties).

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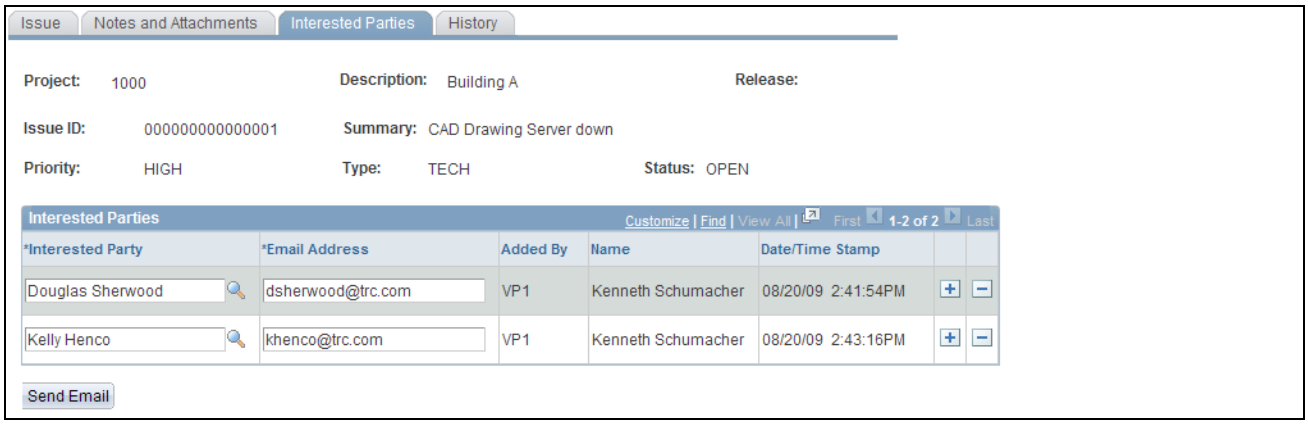

Issue - Interested Parties page

The system populates the Interested Parties grid with the email addresses for the employee that opened the issue and the employee to which the issue is assigned.

Interested Party Select an employee ID from the list of employees.

Email Address Displays the email address from the for the employee ID that is specified as the interested party. When you select an interested party from the employee list, the system automatically populates this field with the email address from the Resource Detail page. If no email address is defined on the Resource Detail page, the system uses the email address from the Operator Definition table (PSOPRDEFN) of the user ID that is associated with the employee. If an email address is not available, you must enter an email address before you can save the issue.

If the assigned resource's employee ID is associated with more than one user ID in PeopleTools Security, the system populates the Interested Parties Email Address field with the first user ID in alphabetic order. This is relevant only if you define more than one user ID to employee ID.

Note. The system automatically populates the issue originator and assigned resource as interested parties. If workflow is enabled, the system automatically populates the issue owner as an interested party when the issue is submitted.

See Also

Chapter 13, "Managing Program and Project Issues," Sending Email Notifications, page 258

Viewing Issue History

Access the Issue - History page (Program Management, Project Management, Add/Update Issues, History).

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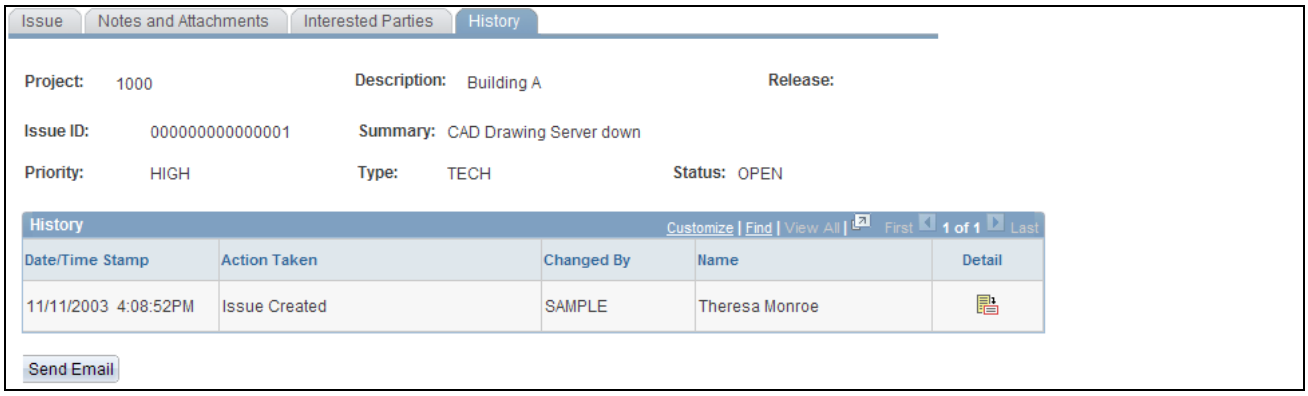

Issue - History page

Use this page to review actions that are performed on the issue and the user ID that performs the update. The most recent action appears at the top of the History grid. These actions appear:

- Issue created
- Priority changed
- Status changed
- Type changed
- Activity changed
- Assignment changed
- Notes added
- Attachments added

Click the Detail icon to access the page where the action occurred.

Reviewing, Updating, and Resolving Issues

This section discusses how to:

- Review issues
- Update and resolve issues

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Pages Used to Review, Update, and Resolve Issues

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Issues	PGM_ISSUES_LIST	Program Management, Project Management, Review Issues, Review Issues	Search for project issues by using a configurable search page.
Issue	PC_IM_ISSUE	Program Management, Project Management, Add/Update Issues, Issue	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.

Reviewing Issues

Access the Review Issues page (Program Management, Project Management, Review Issues, Review Issues).

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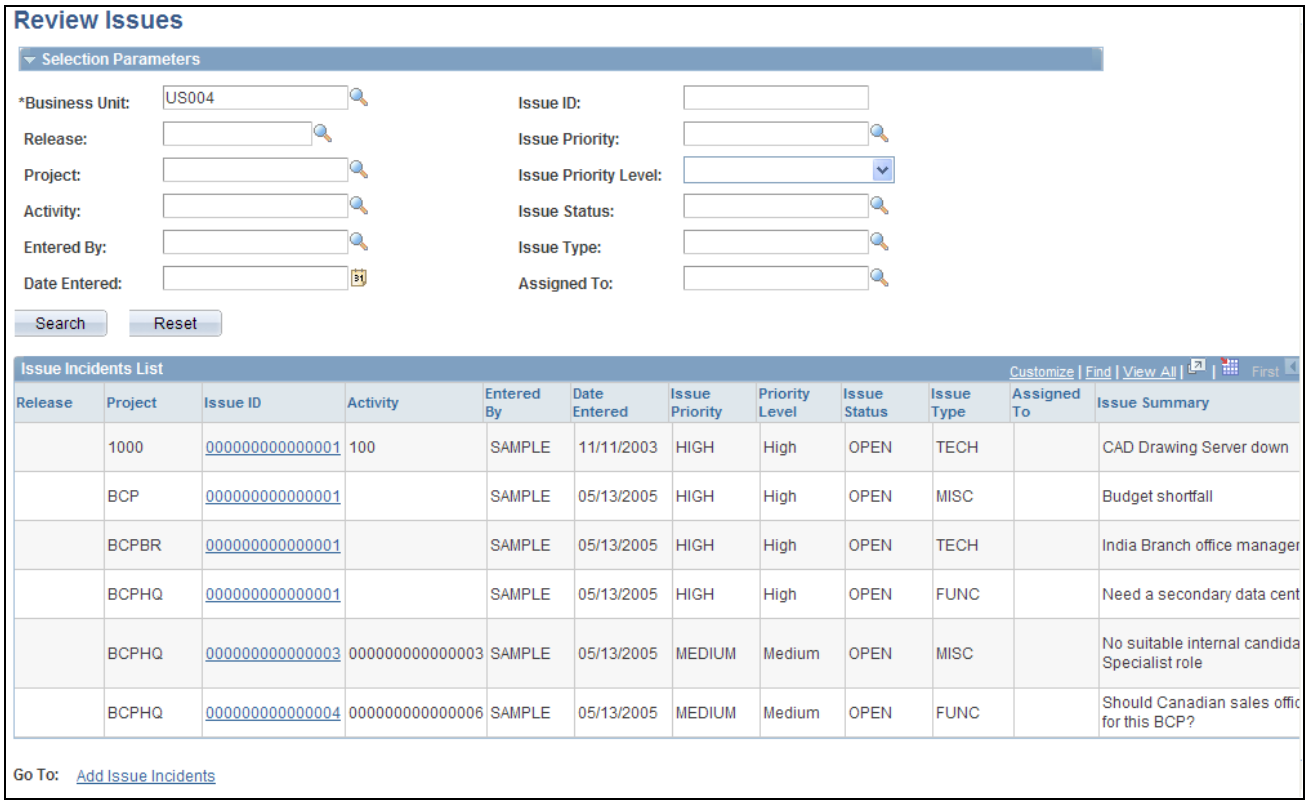

Review Issues page

In the Selection Parameters group box, specify the search options to filter your search results to the issues that you want to view.

Business Unit Enter a business unit. The business unit default value is based on user preferences.

Search Click to display all projects issues that satisfy the search criteria in the Issue Incidents List group box. To iteratively narrow your search results, enter additional search criteria and click the Search button again.

Reset Click to deselect all optional fields in the Selection Parameters group box, and to clear the search results in the Issue Incidents List group box.

Issue ID Click the Issue ID link to access the Issue page, on which you can view and edit data for the selected issue.

Add Issue Incidents Click to access the Add/Update Issues search dialog page to view an existing issue or create a new issue.

Updating and Resolving Issues

Access the Issue page (Program Management, Project Management, Add/Update Issues, Issue).

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Select the resolution status to indicate that this issue is closed. In the Resolution Information scroll area, enter the actual resolution date and 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 is closed, the issue is still considered *open* in management reports 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 13, "Managing Program and Project Issues," Entering Issues, page 248

Generating Issue Reports

This section lists pages used to generate the issue reports that PeopleSoft Program Management delivers.

See Also

Appendix C, "PeopleSoft Program Management Reports," page 501

Pages Used to Generate Issue Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Issues by Assigned To	RUN_PCY5065	Program Management, Reports, Issue, By Assigned To	Define the parameters for the Issues by Assigned To report (PCY5065). Use the report to list issues by the person to whom they are assigned.
Issues by Priority	RUN_PCY5070	Program Management, Reports, Issue, By Priority	Define the parameters for the Issues by Priority report (PCY5070). Use the report to list issues by priority.
Issues by Type	RUN_PCY5075	Program Management, Reports, Issue, By Type	Define the parameters for the Issues by Type report (PCY5075). Use the report to list issues by type.
Issues by Status	RUN_PCY5080	Program Management, Reports, Issue, By Status	Define the parameters for the Issues by Status report (PCY5080). Use the report to list issues by status.

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Page Name	Definition Name	Navigation	Usage
Issues by Project/Activity	RUN_PCY5085	Program Management, Reports, Issue, By Project/Activity	Define the parameters for the Issues by Project/Activity report (PCY5085). Use the report to list issues by project and activity.
Issue Details	RUN_PCY5090	Program Management, Reports, Issue, Details	Define the parameters for the Issue Details report (PCY5090). Use the report to list details for an issue.

Sending Email Notifications

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

Page Used to Send Email Notifications

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

Sending an Email About an Issue

Access the Send Email page (click the Send Email button on the Issue Management component pages).

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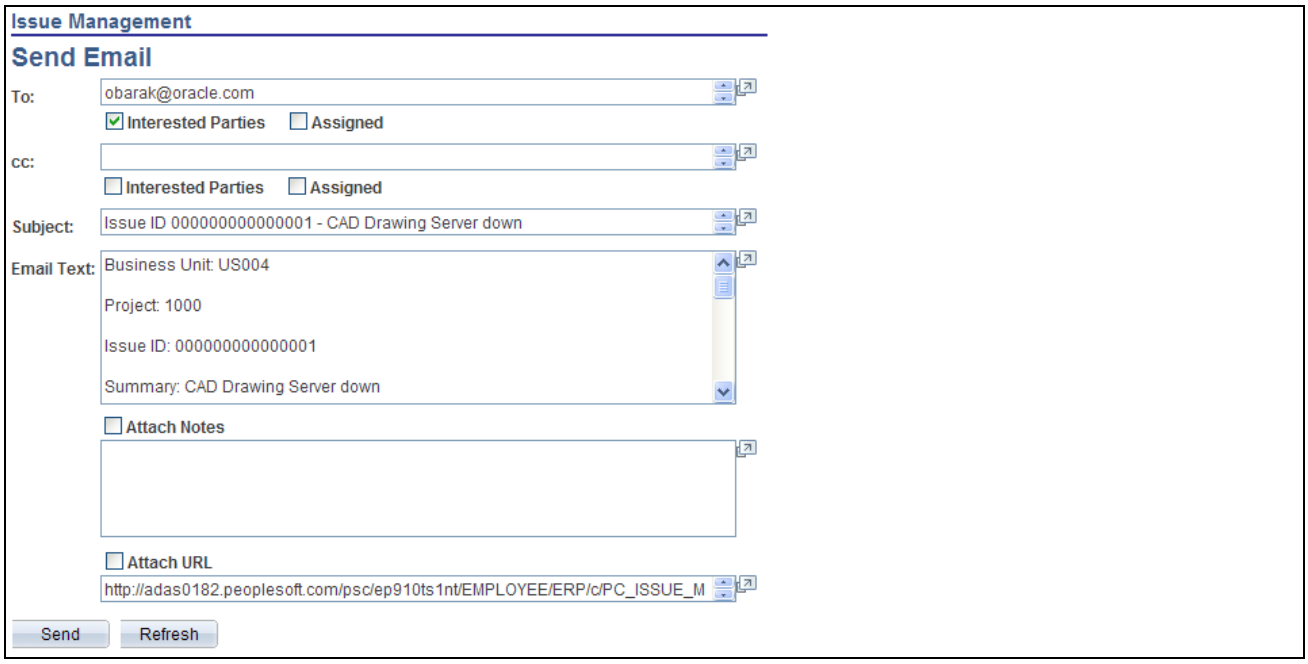

Send Email page

To and **CC**	Enter one or more email addresses. Separate multiple addresses by using semicolons.
Interested Parties	Select to populate the To or CC fields with email addresses from the Interested Parties page. Click the Refresh button to display the email addresses. deselect the check box and click Refresh to remove interested party addresses from the To or CC fields.
Assigned	Select to populate the To or CC fields with the email address of the assigned resource from the Issue page. This check box functions in the same way as the Interested Parties check box.
Subject	Displays the issue ID and summary. The system populates this field automatically, but you can override it.

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Email Text

The system populates this field with the following data:

- Project business unit
- Project ID
- Issue ID
- Issue summary
- Issue description
- Entered by
- Date entered
- Activity ID
- Issue priority
- Issue type
- Issue status
- Assigned resource
- Assignee's email address
- Target resolution date
- Actual resolution date
- Resolution description

Attach Notes

Select to include notes in the email if there are notes for the issue. The system populates this field with the note text.

Attach URL

Select to include a uniform resource locator (URL) to the issue in the email. The system populates this field with the URL that links to the issue.

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Chapter 14

Managing Program, Project, and Activity Risks

This chapter provides an overview of program, project, and activity risks and discusses how to:

- Create risks and action plans.
- Review project risks.

Understanding Program, Project, and Activity Risks

A risk is anything that could jeopardize the successful delivery of a project. PeopleSoft Program Management enables you to enter program, project, or activity risks, risk triggers, and associated action plans. You can classify the risks by type, status, and priority. Risk triggers can be anything that might cause a program, project, or activity risk to occur. You can enter multiple triggers associated with one risk.

Creating action plans for every risk is a key step in managing program, project, and activity risks. Set up action plans as a method of responding to the risk. You can document procedures and techniques to respond to a program, project, or activity risk in the action plan that provide the program or project manager important information if a known risk affects a program, project, or activity.

PeopleSoft Program Management provides many features to monitor risks. This table displays the pages that you use to monitor risks:

Page	***Monitor Method***
Manager Workbench	• Colored risk health indicator for project and activity health. • Project Risk scorecards for the program or project and activity. • Top five risks group box for project and activity.
Review Risks	Configure search criteria to filter the search results to the risks that you want to view.
Review Programs	Colored risk health indicator for each project in the selected program.
My Projects	Colored risk health indicator for each project.

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Page	Monitor Method
Project - General Information	Colored risk health indicator for project health.
Top 5 Risks ESA Portal Pack (pagelet)	List of the five highest priority risks.

Note. The Top 5 Risks pagelet is available only if you have the PeopleSoft ESA Portal Pack.

See Also

Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Risk Types, page 38

PeopleSoft Financials, ESA, ALM, and SCM Portal Packs 9.1 PeopleBook, "Using Pagelets Enabled by PeopleSoft Program Management"

Creating Risks and Action Plans

This section discusses how to:

- Create program, project, and activity risks.
- Establish actions plans for risks.
- Add notes and attachments.

Pages Used to Create Risks and Action Plans

Page Name	Definition Name	Navigation	Usage
Project Risk	PGM_PROJECT_RISK	Program Management, Project Management, Add/Update Risks, Project Risk	Enter project risk details and triggers.
Action Plan	PGM_ACTION_PLAN	Program Management, Project Management, Add/Update Risks, Action Plan	Establish actions plans in response to risks.
Notes and Attachments	PGM_RISK_NOTES	Program Management, Project Management, Add/Update Risks, Notes and Attachments	View and edit comments or file attachments that are relevant to a risk.

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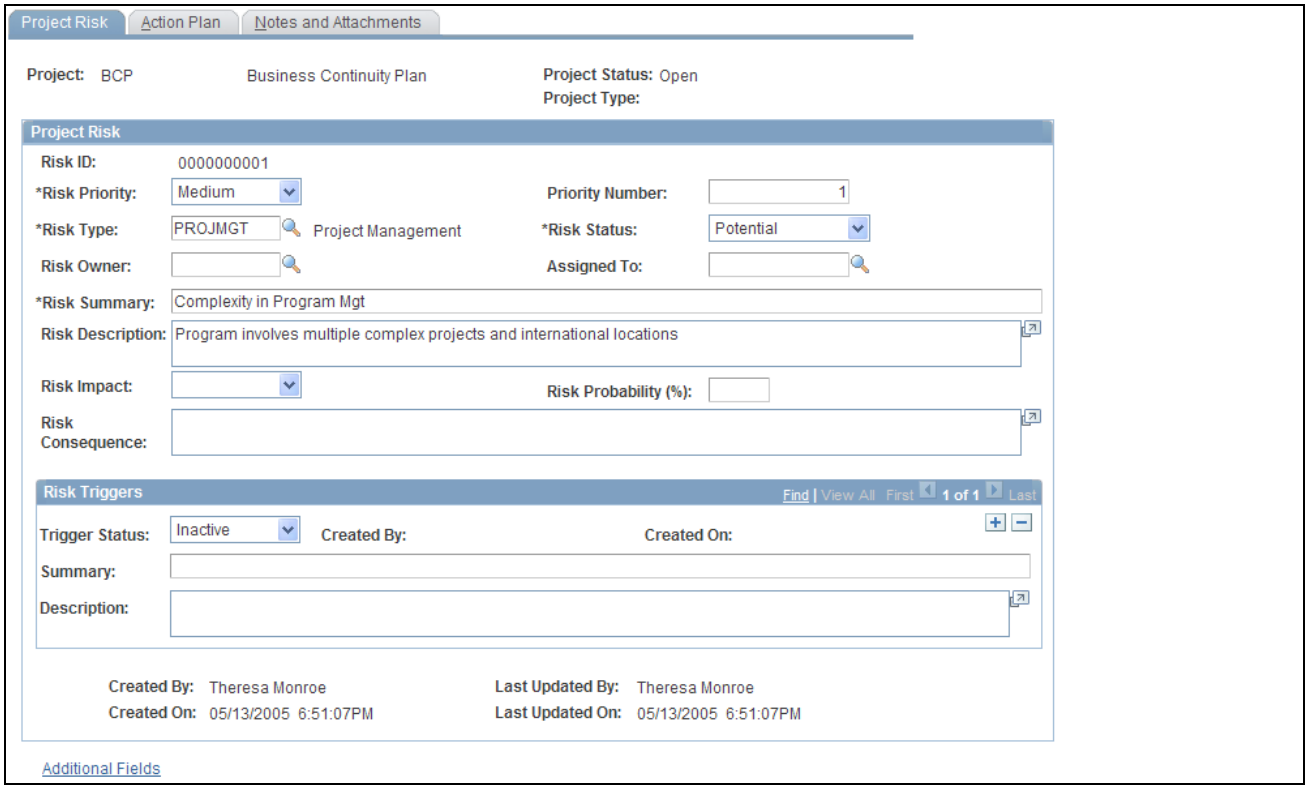
Creating Program, Project, and Activity Risks

Access the Project Risk page (Program Management, Project Management, Add/Update Risks, Project Risk).



Project Risk page

The project, project status, release, and project type fields all come from the program or project for which you are entering the risk.

Risk ID Displays the automatically generated number unique to each project ID. The system displays *Next* until you save the project risk.

Activity Enter the activity to associate with the risk. Leave this field blank if this is a project risk. This field does not appear if this is a program risk.

Risk Priority Select the priority of the risk from these options: *High*, *Medium*, or *Low*. Risks in the Top 5 Risks group box on the Manager Workbench page and the Top 5 Risks pagelet are sorted in conjunction with the Priority Number. Risks are sorted first by risk priority, then by priority number.

Priority Number Enter the ranking, between *1* and *999*, of the risk. The priority number is relative to other risks that have the same risk priority. Enter the same priority number for two risks to indicate that the risks have equal priority.

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Risk Type Enter the type of risk to categorize this risk into a group. You define risk types on the Risk Type page.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Risk Types, page 38.

Risk Status Select the current status of this risk from these options: *Active, Inactive,* or *Potential.* The system displays risks with *Active* and *Potential* statuses on the Top 5 Risks group box on the Manager Workbench page and the Top 5 Risks pagelet.

Risk Owner Enter the employee ID of the risk owner. This is for informational purposes only. The system does not use risk owner for any processing.

Assigned To Enter the employee ID for the individual responsible for monitoring this risk. You can search all risks assigned to an individual on the Review Risks page.

Risk Summary Enter a short summary of the risk. The Risk Summary appears as a link that allows you to access more information about the risk in the Top 5 Risks group box on the Manager Workbench page and the Top 5 Risks pagelet.

Risk Impact Select the effect that this risk might have on the program, project, or activity. Options are: *High, Medium,* or *Low.*

Risk Probability Enter the probability, between *0* and *100* , that this risk will occur. The system treats the value as a percentage (for example *50* means 50 percent).

Risk Consequence Enter the description of the consequence if this risk were to occur.

Additional Fields Click to transfer to a secondary page with ten additional user fields. The system does not use these fields for any processing or reporting, but you can enter any additional information for this risk.

Risk Triggers

Trigger Status Select the trigger status from these options: *Active, Ignore,* and *Inactive.* This field is used for informational purposes only.

Created By Displays the originator's name. The system populates this field when you save the risk.

Created On Displays the date and time. The system populates these values when you save the risk.

Establishing Action Plans for Risks

Access the Action Plan page (Program Management, Project Management, Add/Update Risks, Action Plan).

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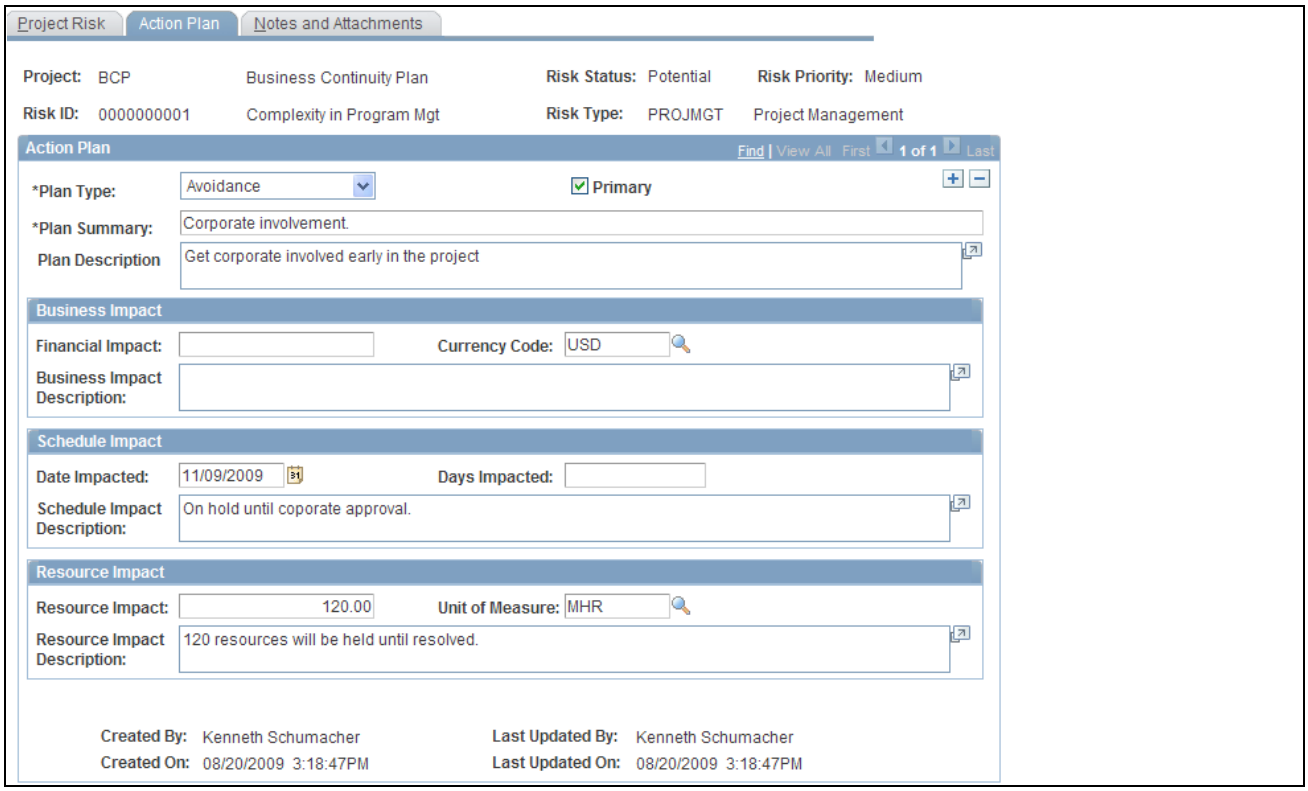

Action Plan page

Plan Type

Select the type of action plan from these options:

Acceptance: Select to indicate that you are not changing the project plan to deal with the risk, or that no suitable response strategy exists.

Avoidance: Select to indicate that you are changing the project plan to eliminate the risk or condition, protecting the project objectives from the risk's impact, or modifying the project objective to accommodate the risk.

Mitigation: Select to indicate that you are reducing the probability or consequences of a risk to an acceptable level.

Transference: Select to indicate that you are shifting the consequences of the risk, and ownership of the response, to a third party. Transferring the risk does not eliminate the risk, but rather makes another party responsible for its management.

Primary

Select to indicate that this action plan is the primary action plan. For a new project risk, the system assigns the first action plan as the primary action plan. You can select only one primary action plan for each risk. The system issues an error message when you save if you select the Primary check box for more than one action plan.

Business Impact

Use this section to identify the effect to a program or project's budget, cost, or revenue.

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Financial Impact and **Currency Code** — Enter the monetary amount and corresponding currency code for the business effect of this action plan.

Schedule Impact

Use this section to record the effect to the project schedule, either a specific date or number of days that would be impacted if this risk occurs.

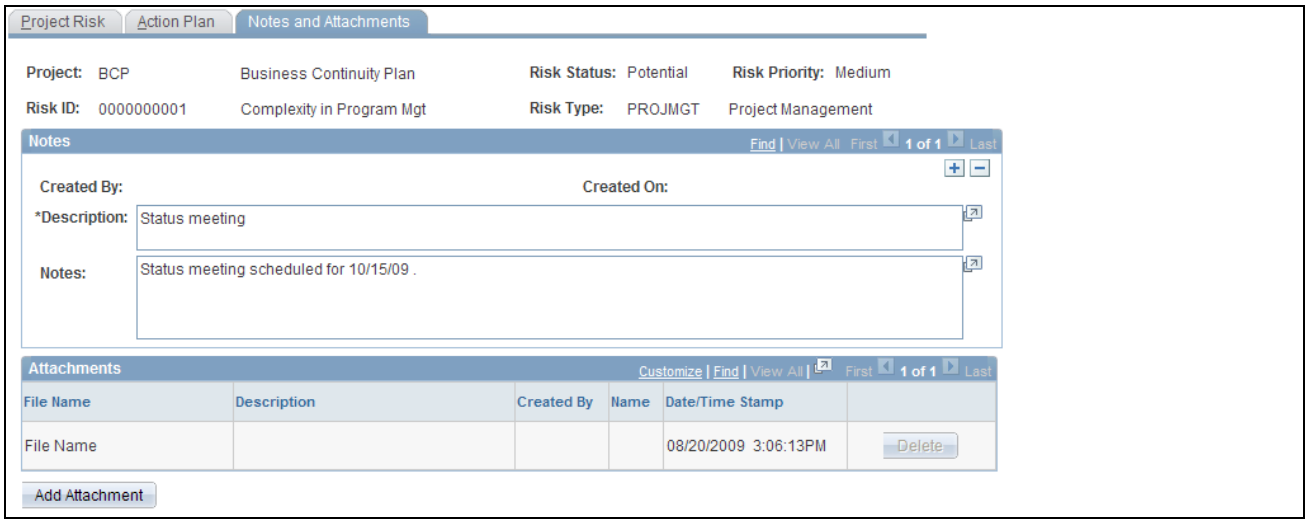
Resource Impact

Use this section to indicate the effect to resources if this risk occurs.

Resource Impact and **Unit of Measure** — Enter a number and the associated unit of measure, such as *MDY* (Person Day) or *MHR* (Work Hour), to indicate the effect to the resources.

Adding Notes and Attachments

Access the Notes and Attachments page (Program Management, Project Management, Add/Update Risks, Notes and Attachments).



Notes and Attachments page

Notes

Enter the description and notes that pertain to this risk.

Attachments

Attach any type of file to this risk.

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Add Attachment Click to add an attachment.

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

File Name Displays the name of the file that you upload as a link. Click on the filename to view the attachment.

Added By, Name, and **Date/Time Stamp** Displays information about the user who adds the attachment, and the date and time that the upload occurred.

Reviewing Program, Project, and Activity Risks

This section discusses how to review program, project and activity risks.

Page Used to Review Program, Project, and Activity Risks

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Risks	PGM_RISKS_LIST	Program Management, Project Management, Review Risks, Review Risks	Search for project risks by using a configurable search page.

Reviewing Program, Project, and Activity Risks

Access the Review Risks page (Program Management, Project Management, Review Risks, Review Risks).

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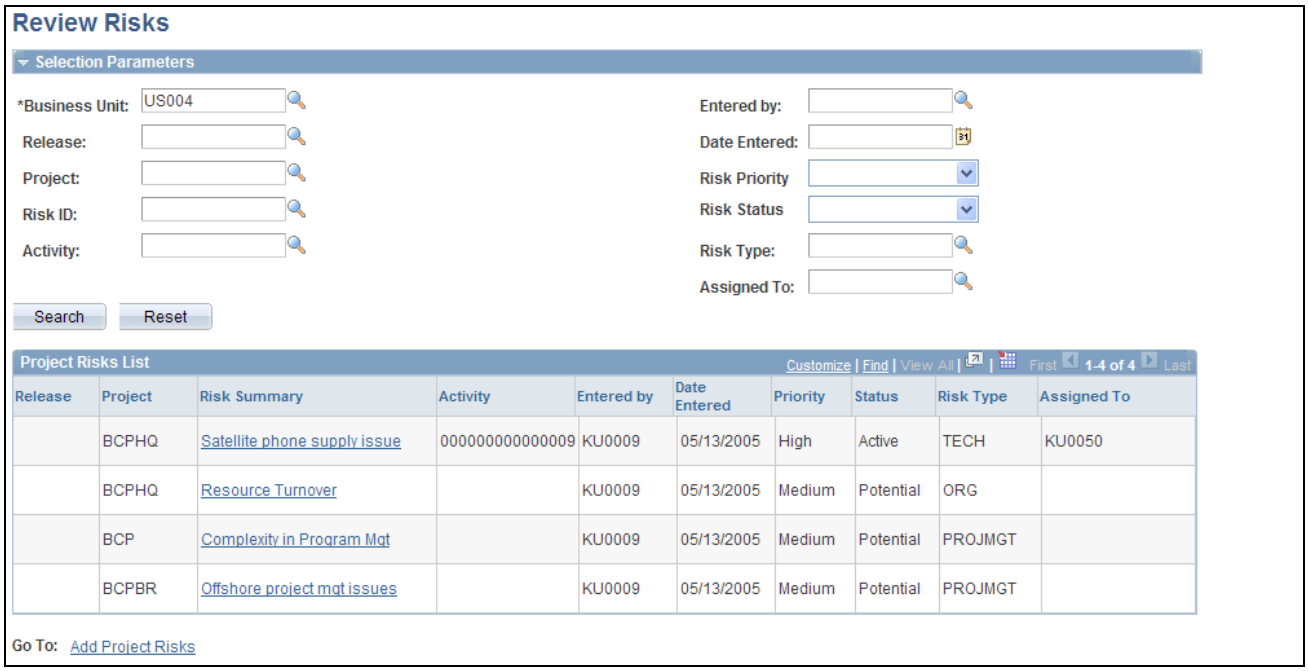

Review Risks page

In the Selection Parameters group box, specify the search options to filter your search results to the risks that you want to view.

Business Unit Enter a business unit. The business unit default value is based on user preferences.

Search Click to display all projects risks that satisfy the search criteria in the Project Risks List group box. To iteratively narrow your search results, enter additional search criteria and click the Search button again.

Reset Click to clear all optional fields in the Selection Parameters group box, and to clear the search results in the Project Risks List group box.

Risk Summary Click the Risk Summary link to access the Project Risk page, on which you can view and edit data for the selected risk.

Add Project Risks Click to access the Project Risk page to create a new program, project, or activity risk.

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Chapter 15

Managing Project Releases

This chapter provides an overview of releases and discusses how to review the status of a release.

Understanding Releases

A release is a common scheduling mechanism that organizations use to package projects or work requests to make them available to customers. In PeopleSoft Program Management, release or program managers can define releases and release types, associate projects, issues, change requests, and risks to releases, and view a list of projects by release.

Organizations have programs, projects, and releases. Programs are large initiatives that might contain multiple projects and span multiple releases. Projects or work requests can be components of programs and are made available to customers through releases. This diagram illustrates the relationship between programs, projects, and releases:

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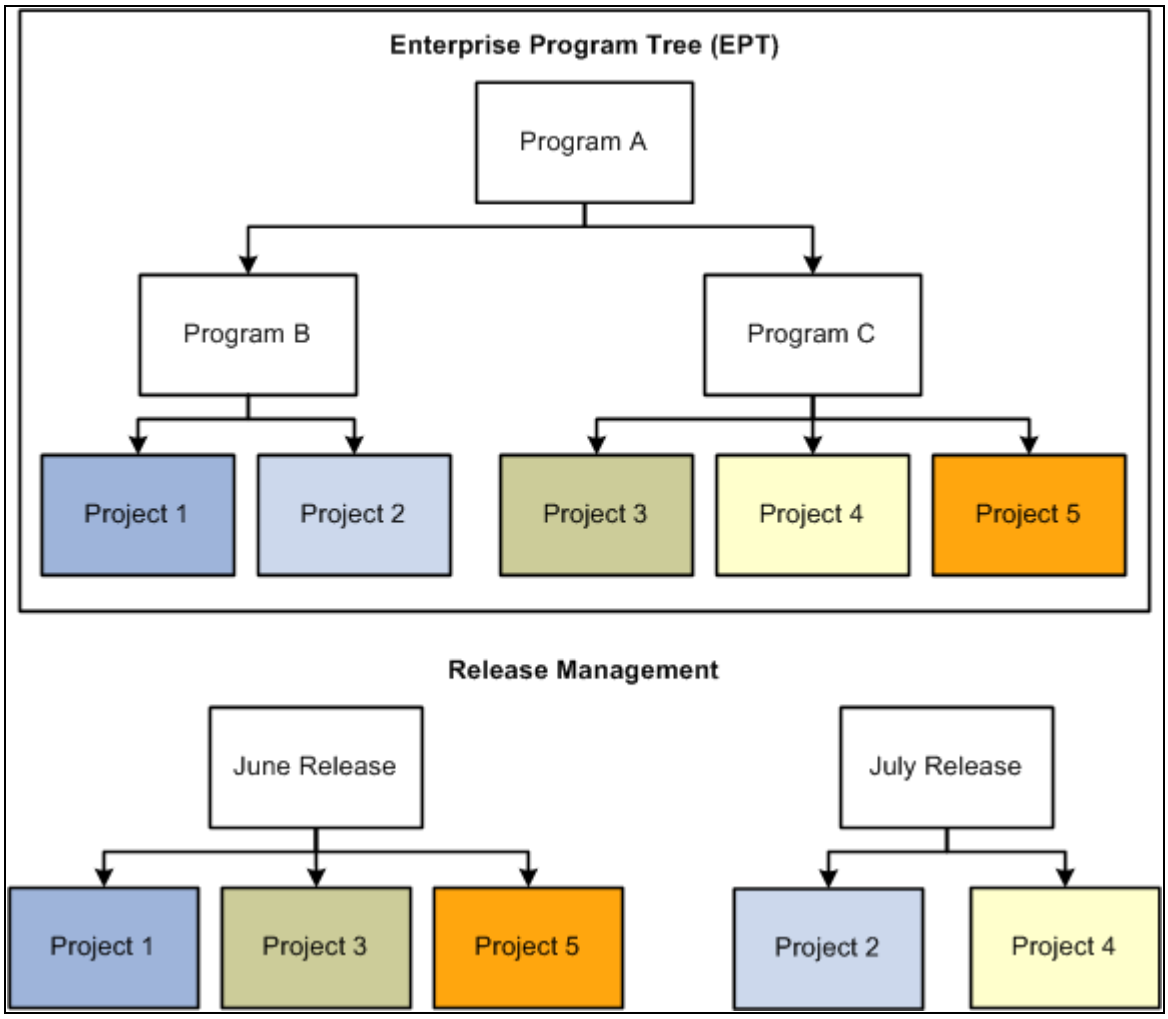

Program, project, and release relationship

You must define a release before you associate it with a project. Releases are defined using the Release Management component.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Releases, page 39.

Reviewing Release Status

This section discusses how to review the status of a release.

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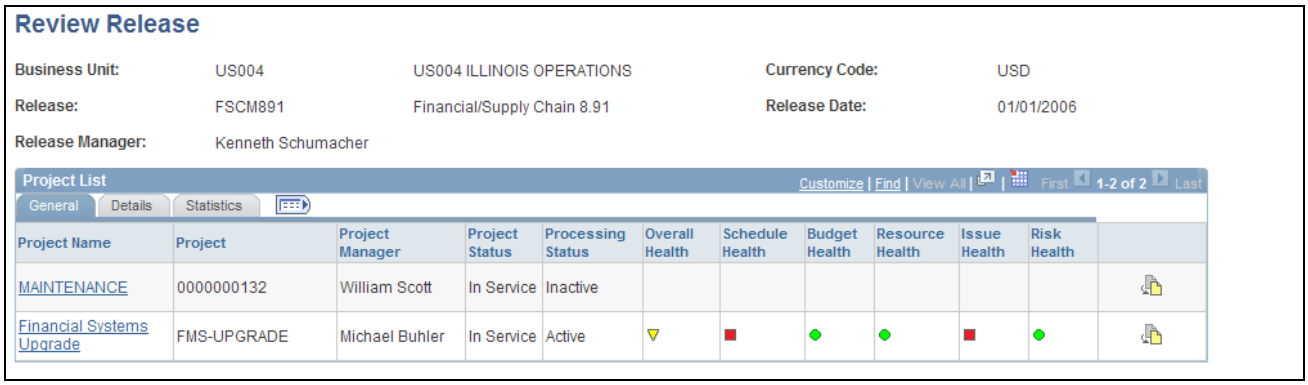
Page Used to Review Release Status

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Release	PGM_RELEASE_REVIEW	Program Management, Release Management, Review Release, Review Release	Review a list of programs and projects, as well as program and project data for a release.

Reviewing the Status of a Release

Access the Review Release page (Program Management, Release Management, Review Release, Review Release).



Review Release page

Release Manager Displays the name of the individual that is designated as the release manager on the Release page.

Currency Code Displays the business unit base currency code.

Release Date Displays the current target release date that you enter on the Release page.

Project List - General

Project Name Displays the project description. Click to access the Project - General Information page, on which you can view or update details of the program or project.

Project Manager Displays the current program or project manager for each project in the list. The field is blank if no current program or project manager exists.

Project Status Displays the current program or project status for each project in the list.

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Processing Status Displays the current processing status for each program or project in the list.

Indicates that the program or project is in good health for the corresponding project health criteria.

Indicates that the program or project is in fair health for the corresponding project health criteria.

Indicates that the program or project is in poor health for the corresponding project health criteria.

Click the Link to Project Request icon to access the Project Request component, from which you can view the project request. 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 icon for a project that 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 - Detail

Percent Complete Displays the current percent complete for the project.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Analyzing Projects," Calculating Project Progress.

Planned Cost Budget Displays the cost budget for projects in *Pending* processing status. The system selects this budget data from the Budget Summary table (PC_BUD_SUMMARY). The budget data that appears is data that has not yet been finalized. The system does not summarize the data in this column at the program level.

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

Cost Budget Displays the finalized cost budget for projects in *Active* or *Inactive* processing status. The system selects this budget data from the Activity Summary table (PC_ACTIVITY_SUM). This system summarizes the data in this column at the program level.

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

Cost Actuals Displays the project's actual cost. This system selects this data from the Activity Summary table. The system summarizes the data in this column at the program level.

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Cost Variance	Displays the difference in the budget and actual amounts calculated as *Budget Amount – Actual Amount.*

Project List - Statistics

Total Issues	Displays the total number of unresolved issues that exist for the project. (Unresolved issues are issues for which the resolution date is blank.) Click the number to transfer to the Issue Management search page, on which you can review project issues.
Critical Issues	Displays how many critical unresolved issues exist for the project.
Percent Critical	Displays the percent of issues that are critical, calculated as *(Number of critical unresolved issues ÷ Total number of unresolved issues) × 100.*
Total Deliverables	Displays the total number of deliverables that have been entered for each project in the list. Click the number to access the Deliverables search page, on which you can review project deliverables.
Percent Overdue	Displays the percent of total deliverables that are overdue, calculated as *(Number of overdue deliverables ÷ Total number of deliverables) × 100.*
Total Risks	Displays the total number of risks for each project in the list. Select to access the Risks search page to look up risks.
Percent No Action	Displays the percent of risks that have no action plan, calculated as *(Number of risks with no action plan ÷ Total number of risks) × 100.*

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Chapter 16

Controlling Project Changes

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

- Track project changes.
- Track estimate to complete (ETC) changes.
- Track cross-project dependency changes.
- Track budget changes.
- View and analyze changes.

Understanding Change Control Management

This section discusses:

- Change control management.
- Change requests for project and budget changes.
- Change requests for ETC changes.
- Change requests for cross-project dependency.
- Change request approval workflow.

Change Control Management

In PeopleSoft Program Management, you can enable change control for project, budget, and ETC changes. You can determine the depth of change control using one of these levels:

- Require users to enter a formal change request that requires approval before the data is incorporated into the system.
- Require users to enter a reason for changing data.
- Log the user name, change made, and date for data changes.
- Disable change control completely.

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A change control template stores the level of control for attributes that are to be monitored. You assign a default template at the business unit level. When you enable change control on a project, this system populates the template that you assigned at the business unit level as the default, but you can override it by selecting a new template.

This table lists the attributes for which you can enable change control and the level of control available for each attribute:

Attribute	*Change Request Required*	*User Input*	*On*	*Off*
Project Level - Updating Project Dates	Yes	Yes	Yes	Yes
Project Level - Updating Project Status	Yes	Yes	Yes	Yes
Project Resource Level - Add and Delete Resource	Yes	Yes	Yes	Yes
Project Resource Level - Updating Resource Dates	Yes	Yes	Yes	Yes
Activity Level - Add and Delete Activities	Yes	Yes	Yes	Yes
Activity Level - Updating Activity Dates	Yes	Yes	Yes	Yes
Activity Level - Updating Activity Status	Yes	Yes	Yes	Yes
Activity Level - Change Milestones	Yes	Yes	Yes	Yes
Activity Resource Level - Add and Delete Resources	Yes	Yes	Yes	Yes
Activity Resource Level - Updating Resource Units	Yes	Yes	Yes	Yes
Transaction Level - Add and Delete Transactions	No	No	Yes	Yes
Estimate to Complete Level - Updating Estimate to Complete	Yes	No	Yes	Yes
Budget Plan Level - Finalize Budget Plan	Yes	Yes	Yes	Yes

When change control is enabled and you designate specific attributes in the template to have change control, the system stores a record of all the data changes to these attributes on the Change Control Information table (PC_CHC_INFO). If specified, the system requires the user who initiates the change to enter the reason for making a change or to create a formal change request that requires approval before the changes take place. After changes take place, you can view a summarized list of the changes and the details of each change.

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 monitor, such as whether a formal change request is required or changes require a reason from the user who initiates the change.

   Once created, specify the default change control template for a projects business unit on the Program Management Options page.

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

   If the change control template you select specifies change control for attributes at the activity level, you can disable it for individual activities on the Activity - Definition page for the User Input and On levels. If you have change control at the project level set to Change Request Required, you cannot override this at the activity level.

3. Make changes to the project, budget or ETC as necessary.

   As changes are made or approved, if a change request is required for any of the defined change control attributes, the system records the name of the user who is making the change, the change that is made, and the date for data changes in the PC_CHC_INFO table. You can view the changes on the Change Control Monitor page and Change Control Details page.

See Also

Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Change Control Templates, page 34

Change Requests for Project and Budget Changes

Users can enter project and budget change requests in two ways:

- When prompted by the system after trying to save a data element that requires a change request.
- Directly through menu navigation.

If you enable change control for a project that requires change requests, the project must have a project manager. Similarly, if you enable change control for a budget plan that requires change requests, you must specify the budget approver on the Project General - Program Management page. Although, if the approver is the individual who is making the data change, the system accepts the change and does not require a formal change request.

This diagram illustrates the change control process for budget and project changes:

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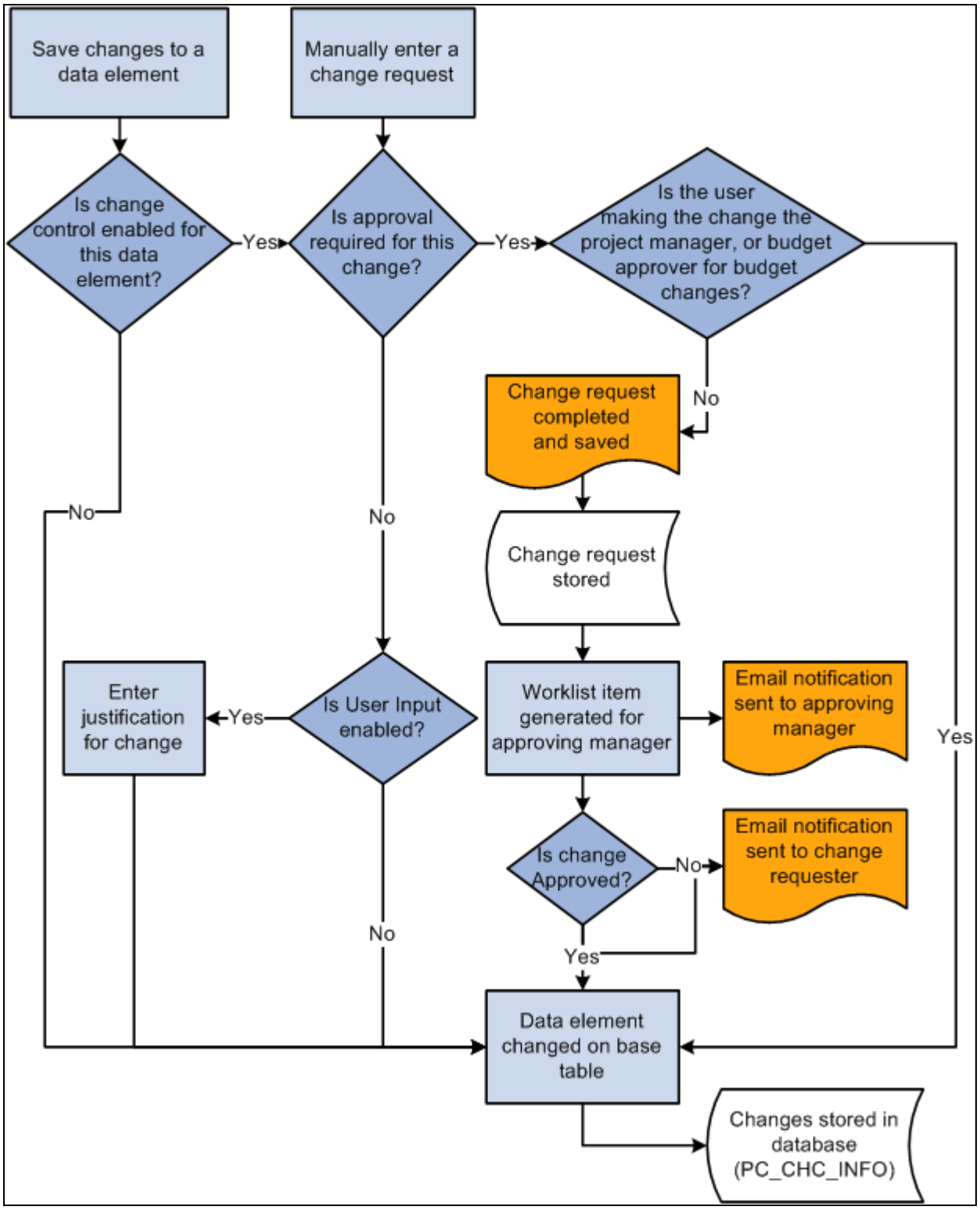

Change control flow diagram

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Change Requests for ETC Changes

ETC defines remaining work for a resource on an activity. This field is first populated when a project manager enters assigned work for a resource on an activity. You may update this field by using the Time Reporting feature in PeopleSoft Expenses, and the value appears on the Resources by Activity page (PC_ARL) after the Expenses to Projects integration process (PC_EX_TO_PC) completes. The ETC change request functionality is available only if you use PeopleSoft Expenses.

The method of approving an ETC change request is based on:

- User role.

  If you are the project manager and the time report approver, you can approve the change request and time report on the Approve Time Report - Time Report Summary page (TE_TIME_LINES). If the project manager is different than the time report approver, the project manager approves the change request on the Project Change Request (approval) page.

- PeopleSoft Expenses installation option for time report approval.

  You can select PeopleSoft Expenses installation options to automatically approve time reports, enable project managers to approve time reports, or the resource's supervisor to approve time reports.

- Change control template options.

  You can select an option to require an ETC change request, log the change, or disable change control for ETCs.

This diagram illustrates the process flow for entering, submitting, and approving ETC change requests:

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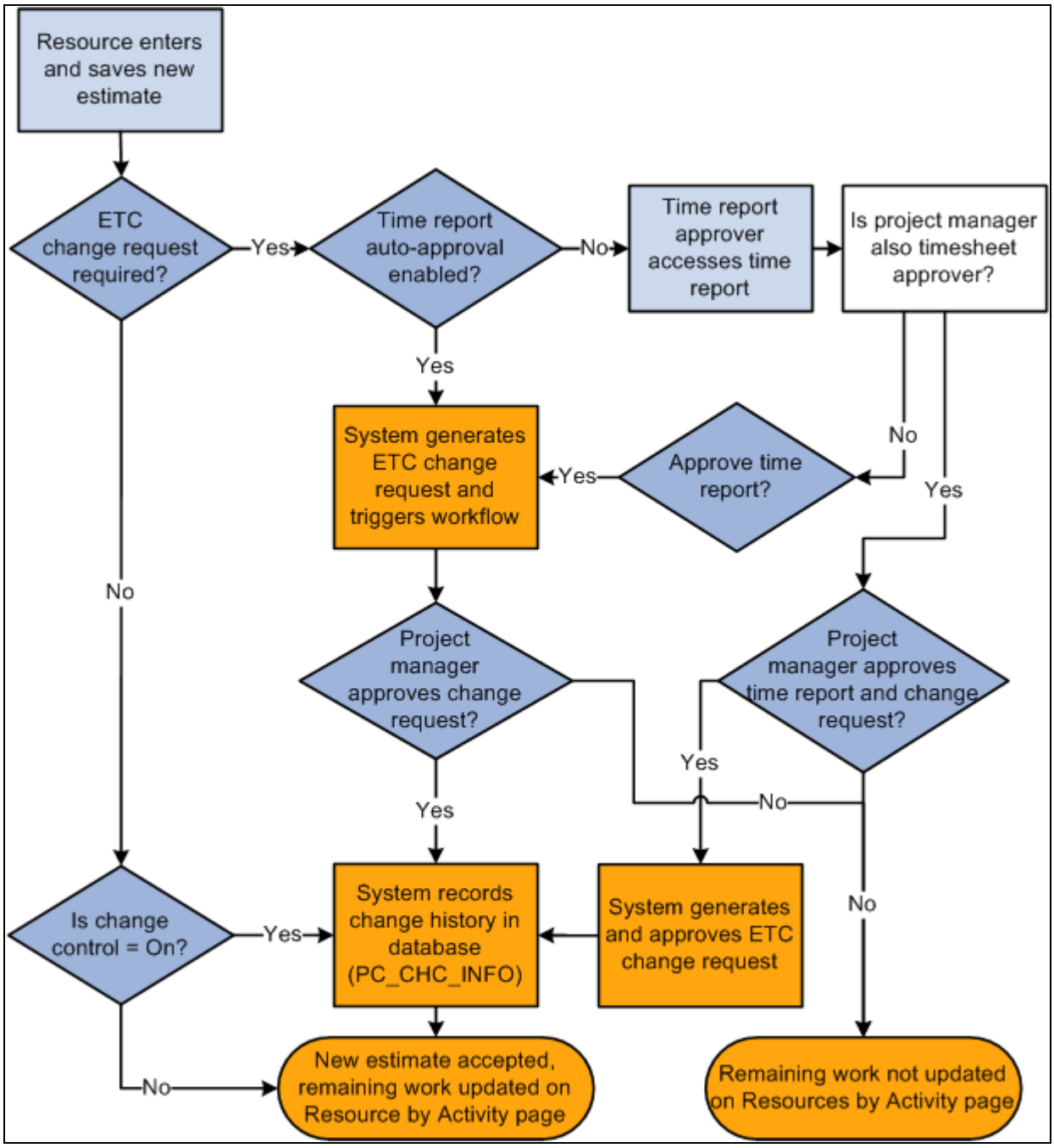

ETC change request process flow diagram

See Also

PeopleSoft Expenses 9.1 PeopleBook, "Preparing Time Reports and Time Adjustments"

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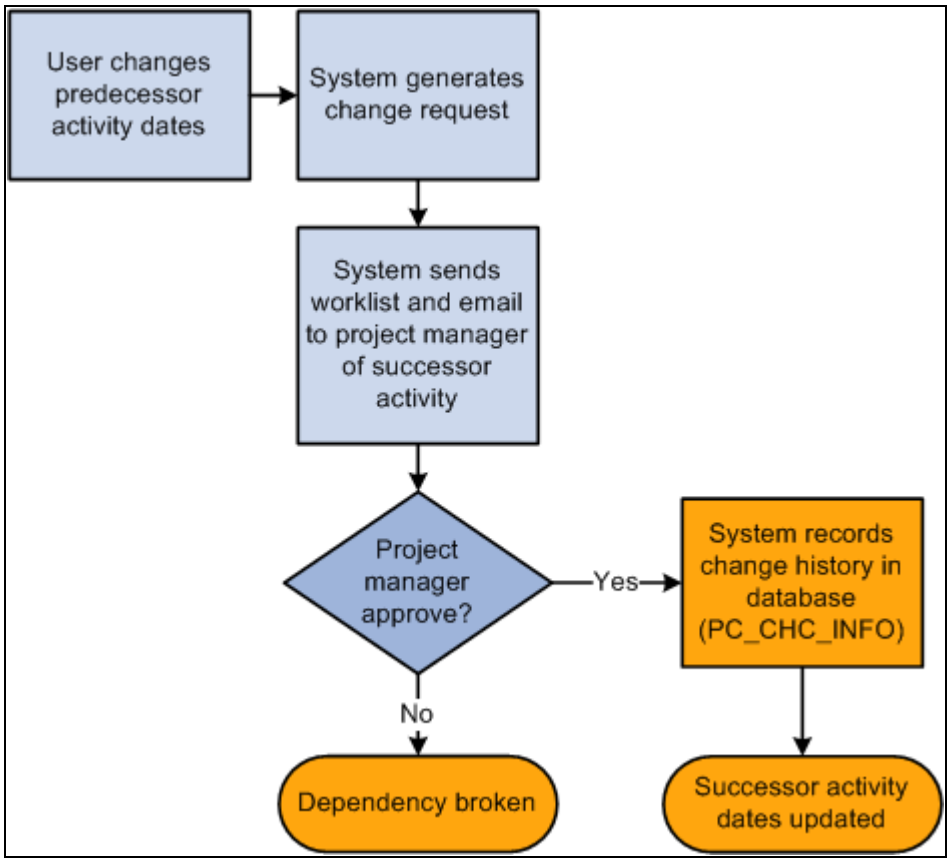
Change Requests for Cross-Project Dependencies

A cross-project dependency exists if you have an activity (successor) in one project that is dependent on an activity (predecessor) in another project. If you change the start date or end date of the predecessor activity that impacts the dates of the successor activity in a different project, the dates of the successor activity are not updated in real-time. The system automatically generates a change request to update the dates of the successor activity and routes the change request to the project manger of the project that contains that successor activity. The project manager has the opportunity to approve or decline the change request. If the project manager approves the change request, the system updates the successor activity dates. If the project manager declines the change request, the system does not update the activity dates and the dependency between the two activities is removed. Cross-project dependency change requests are like activity date change requests, except that they are generated by the system.

This graphic illustrates the cross-project dependency change request process flow:



Cross-project dependency change request process flow

See Also

Chapter 9, "Using Schedule Dependencies and Constraints," page 121

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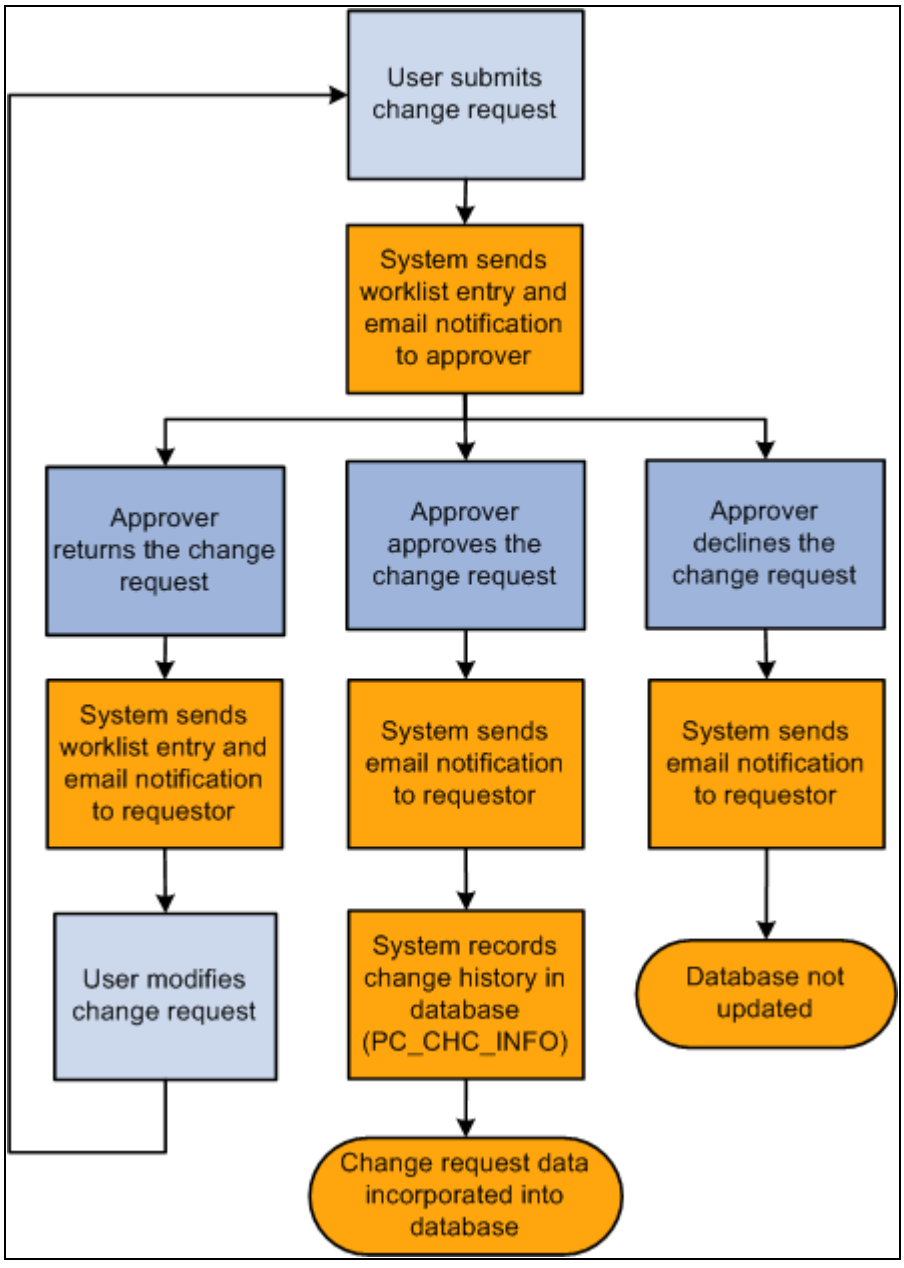
Change Request Approval Workflow

Project change requests require project manager approval and budget changes requests require approval by the budget approver before the system updates the data elements with the changes. When you save and submit a change request, the system triggers workflow. A worklist entry and email notification are sent to the approver to indicate that a change request is available for review.

This diagram illustrates the change request workflow process flow:



Change Request Workflow process flow diagram

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See Also

Appendix B, "Delivered Workflows for PeopleSoft Program Management," page 483

Tracking Project Changes

This section discusses how to:

- Enter user input for changes.
- Enter project changes.
- Approve project changes.

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Pages Used to Track Project Changes

Page Name	*Definition Name*	*Navigation*	*Usage*
Change Control User Input	PC_CHC_INPUT	You can access the Change Control User Input page through multiple navigation paths. This list presents four frequently used paths. • Program Management, Project Definitions, General Information, General Information Save changes to a field that is specified on the change control template as *User Input.* • Program Management, Project Definitions, Resources, Resources Save changes to a field that is specified on the change control template as *User Input.* • Program Management, Project Definitions, Resources, Resources by Activity Save changes to a field that is specified on the change control template as *User Input.* • Program Management, Activity Definitions, Project Activities, General Information Save changes to a field that is specified on the change control template as *User Input.*	Enter the required reason for change.

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Page Name	Definition Name	Navigation	Usage
Project Change Request	PGM_PRJ_CHC_REQ	You can access the Project Change Request page through multiple navigation paths. This list presents four frequently used paths. The primary path appears first. • Program Management, Project Management, Project Change Request, Project Change Request • Program Management, Project Definitions, General Information, General Information Save changes to a field that is specified on the change control template as *Change Request Required.* • Program Management, Project Definitions, Resources, Resources by Activity Save changes to a field that is specified on the change control template as *Change Request Required.* • Program Management, Activity Definitions, Project Activities, General Information Save changes to a field that is specified on the change control template as *Change Request Required.*	Enter details regarding the change request including changes to the project, activity, project resource list, and activity resource list.
Project Change Request (comments)	PGM_PRJ_CHC_CMNTS	Click the comments icon from the Project Change Request page.	Enter any comments regarding the change request.

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Page Name	Definition Name	Navigation	Usage
Project Change Request (approval)	PGM_PRJ_CHC_REQ	• Program Management, Project Management, Project Change Request, Project Change Request • Worklist, Worklist, Worklist for <User ID>:<Resource> Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Project Change Request Wrklist work item. • Click Worklist from the PeopleSoft universal navigation header. Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Project Change Request Wrklist work item.	Approve, decline, or return the change request. **Note.** You must be the project manager in order to access this approval page.

Entering User Input for Changes

Access the Change Control User Input page (save changes to a field that is specified on the change control template as *User Input.*).

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

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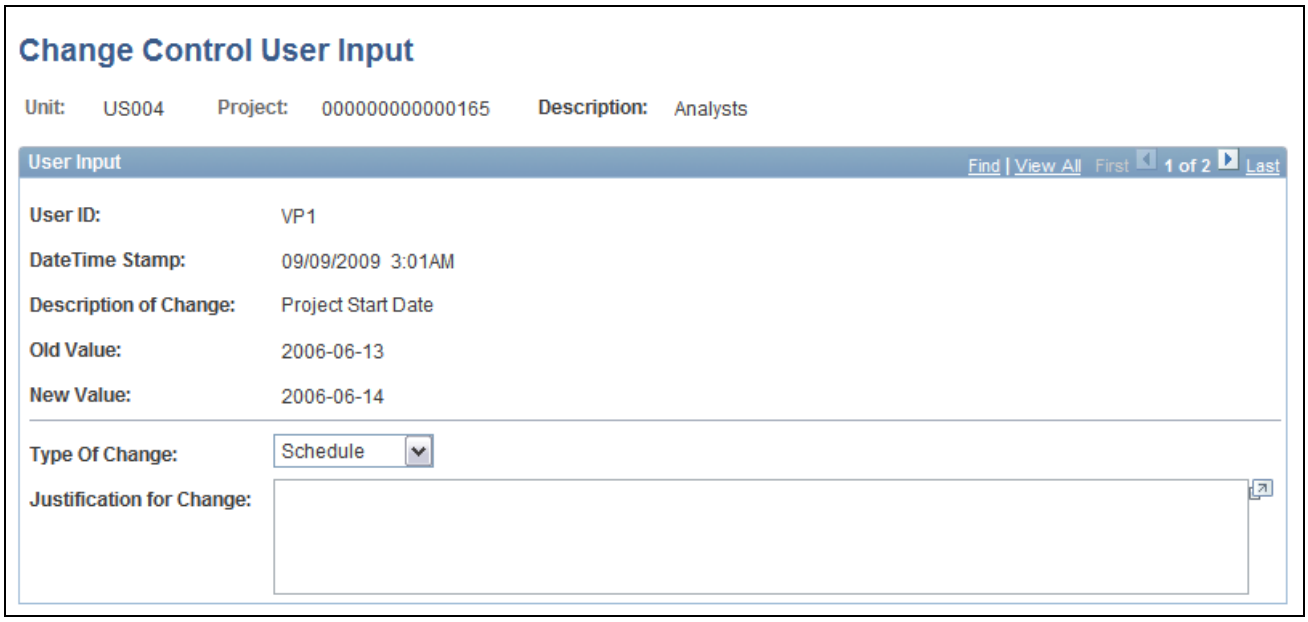

Change Control User Input page

Type of Change Enter the type of change. The value that corresponds to the initiated change appears by default in this field. 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 are made on the same page and require user input, the Change Control User Input page appears with a scroll area to accommodate entering data for each change.

Entering Project Changes

Access the Project Change Request page (Program Management, Project Management, Project Change Request, Project Change Request).

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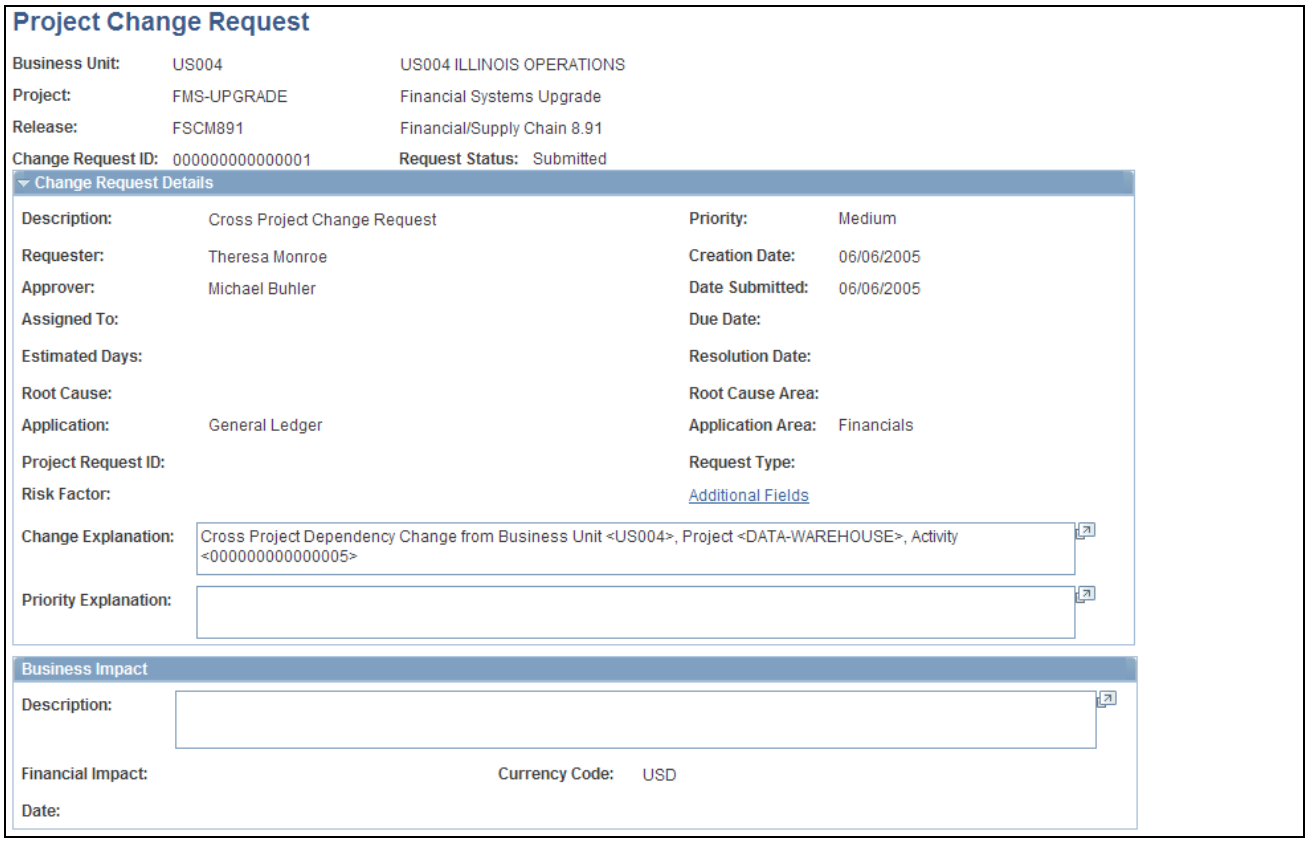
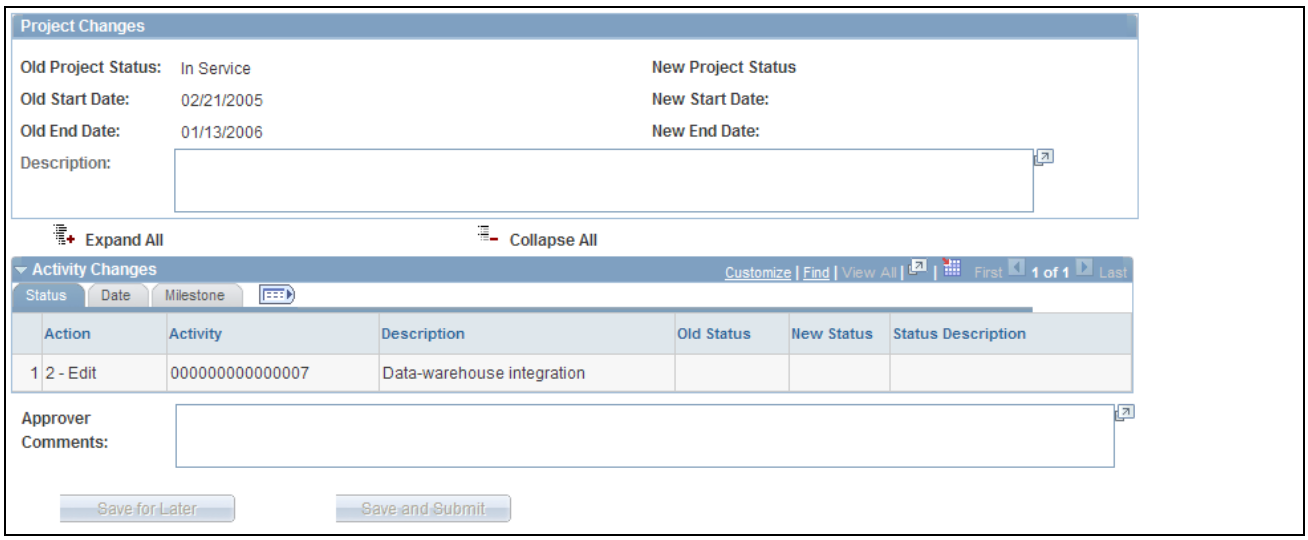


Project Change Request page (1 of 2)



Project Change Request page (2 of 2)

The business unit, project, and release come from the program or project for which you are entering the change request.

Change Request ID Displays *NEXT* for new change requests. The system generates and displays a unique ID after you save the change request.

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Request Status

Displays the current request status. Possible values are:

Pending: The request has been created, but not submitted.

Submitted: The request has been submitted and is awaiting review by the approver. The page is display-only in this state.

Returned: The approver returned the change request for rework.

Approved: The approver approved the request. The page is display-only in this state.

Declined: The approver declined the change request. The page is display-only in this state and is not available for rework.

Expand All

Click to expand all of the group boxes. This icon appears only if you specify that a change request is required for at least one attribute at the project resource, activity, or activity resource level on the change control template.

Collapse All

Click to collapse all of the group boxes. This icon appears only if you specify that a change request is required for at least one attribute at the project resource, activity, or activity resource level on the change control template.

Save for Later

Click to save this change request in pending status. Use this option if you have not completed the change request. You can continue to make changes to this change request until you save and submit it to the project manager for review.

Save and Submit

Click to save the change request and trigger workflow processing. The system sends a worklist entry to the project manager. There must be project manager to save and submit this change request. The change request status is now *Submitted.*

Change Request Details

Priority

Select *High*, *Medium*, or *Low* for the priority of this change request. The system displays the priority on the worklist item.

Requestor

Displays the name of the user who enters the change request.

Approver

Displays the name of the current program or project manager. The program or project manager is responsible for approving the change request. The system sends a worklist item to this user when you submit the change request.

Creation Date

Displays the date on which you created the request.

Assigned To

Enter the employee ID to which you want to assign this change request. This field is only for informational purposes.

Due Date

Enter the date by which this change request should be completed.

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Estimated Days Enter the number of days that you estimate that might be added to the project if the project changes occur as a result of this change request. This field is only for informational purposes.

Resolution Date Displays the date on which the change request is resolved. A change request is considered resolved when the approver either approves or declines the request.

Root cause Enter a description of the root cause that requires this change request. This field is only for informational purposes.

Root Cause Area Select from the list of active root cause areas. Root cause areas are set up at the setID level.

See Chapter 5, "Setting Up PeopleSoft Program Management Control Data," Defining Root Cause Areas, page 40.

Application Area Impacted and **Application Impacted** Displays the application area that is impacted and application impacted values from the program or project.

Project Request ID Displays the project request ID. This value appears only if this project originated from a project request and the project is on the enterprise program tree.

See Chapter 7, "Managing Programs and Projects," Establishing and Maintaining Enterprise Program Trees, page 83.

Request Type Displays the initiative type ID description from the Project Request page. This value appears only if this project originated from a project request.

Risk Factor Enter a number between *1* and *99* to indicate the relative risk of this change request. The application does not use this field for any processing.

Additional Fields Click to transfer to a secondary page with ten additional user fields. The system does not use these fields for any processing or reporting, so you can enter any additional information for this change request.

Business Impact

Enter data about the potential impact of this change.

Financial Impact Enter a numeric value and corresponding currency code to indicate the financial impact of this change

Date Enter a date. This application does not use this field for any processing.

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Project Changes

Old Project Status, Old Start Date, and **Old End Date** — Displays current values from the program or project.

New Project Status — Enter the new project status that you are requesting. This field prompts from the available active project statuses.

New Start Date — Enter the new start date that you are requesting. If you enter a new start date, you must also enter a new end date.

New End Date — Enter the new end date that you are requesting. If you enter a new end date, you must also enter a new start date.

Activity Changes

Enter and submit changes to project activities. The group box appears only if this is a project change request and a change request is required for at least one of the activity level attributes on the change control template. The system applies the changes only if the project manager approves the change request.

Action — Select the action to describe your change request from these options:

1 - Add: The system creates a new activity based on the data you enter and adds it to the project. This action appears only if you specify that a change request is required to add or delete activities on the change control template.

2 - Edit: The system changes the activity data based on the changes you enter for this row. This action appears only if you specify that a change request is required for updating activity dates, activity status, or changing milestones on the control template.

3 - Delete: The system deletes this activity from the project. This action appears only if the project's status is pending and you specify that a change request is required to add or delete activities on the change control template.

Activity — Enter the activity for which you want to request a change. If you select the *Edit* or *Delete* actions, you can use the prompt to select from a list of all activities that are associated with this project. If you select the *Add* action, the text *NEXT* appears and the system generates a new unique ID when the project manager approves this change request.

Description — Displays the description for the activity. If you select the *Add* action, you must enter a description for the activity.

Old Status — Displays the current activity status. If you are adding a new activity, the old status is blank.

New Status — Enter the new activity status. The system creates this activity status with the current effective date.

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Status Description Displays the description of the new status.

Old Start Date and **Old End Date** Displays current dates from the activity for this resource. If you are adding a resource, these fields are blank.

New Start Date Enter the new start date for this activity. If you enter a new start date, you must also enter a new end date.

Note. For summary activities, you can only change activity dates if the project's activity date cascade calculation is set to *Manual Entry* on the Project - Program Management page.

New End Date Enter the new end date for this activity. If you enter a new end date, you must enter a new start date.

Old Milestone Displays the current milestone flag value from the activity. If you add a new activity, this field is blank.

New Milestone Select to indicate that this activity is a new milestone.

Click the comments icon to transfer you to the Project Change Request (comments) page on which you can enter any comments regarding this change request.

Project Resource List Changes

Enter and submit changes to the list of resources on the Resources page. The group box appears only if this is a project change request and a change request is required for at least one of the project resource level attributes on the change control template. The system applies the changes only if the project manager approves the change request.

Note. Project Resource List Changes apply only to labor resources.

Action Select the action to describe your change request from these options:

1 - Add: The system adds a new resource based on the data you enter and adds it to the project. This action appears only if you specify that a change request is required to add and delete resources for the project resource level on the change control template.

2 - Edit: The system changes the activity data based on the changes you enter for this row. This action appears only if you specify that a change request is required for updating resource dates on the control template.

3 - Delete: The system deletes this resource or the schedule row from the project. If you leave the Schedule Number field blank, the system deletes the resource from the project. If you enter a value in the Schedule Number field, the system deletes the row from the project with the schedule number that you specify. This action appears only if you specify that a change request is required to add and delete resources for the project resource level on the change control template.

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Resource Name	Displays the name of the resource who is associated with the ID you enter in the ID Number field. If you add a generic resource, you must enter a resource name.
ID Number	Enter the employee ID for which you are entering this change request. If you add a generic resource, you must use the text *Generic*. If you edit or delete a resource, the system prompts from the list of resources who are currently assigned to this project.
Schedule Number	Displays the schedule number for the resource. The system obtains the schedule number from the Resource Detail page. If you add a resource, this field is blank. The system assigns the schedule number when the project manager approves the change request. If you edit or delete the resource, you can select the schedule that you want to edit or delete. The system obtains the prompt values for schedule numbers from the PROJ_TEAM_SCHED record for the resource. If you don't modify the schedule number, the system will only update the dates. If you enter a schedule number that does not exist, the system adds a new schedule for this resource.
Project Role	Enter the resource's project role. If you are adding this resource, you must enter a project role. If you are editing this resource's data, the current project role displays. You can enter a new project role for this resource. If you are deleting a resource, the resource's current project role appears.
Old Start Date and **Old End Date**	Displays current dates for the resource and schedule number that you select. If you add a resource, these fields are blank.
New Start Date and **New End Date**	Enter the new start and end dates for this resource and schedule number. If you delete a resource, you cannot enter dates into these fields.

Activity Resource List Changes

Enter and submit changes to the list of labor resources for an activity on the Resources by Activity page. The group box appears only if this is a project change request and a change request is required for at least one of the activity resource level attributes on the change control template. The system applies the changes only if the project manager approves the change request.

Note. Activity Resource List Changes apply only to labor resources.

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Action

Select the action to describe your change request from these options:

1 - Add: The system adds a new resource to the activity based on the data you enter and adds it to the project. This action appears only if you specify that a change request is required to add and delete resources for the activity resource level on the change control template.

2 - Edit: The system changes the activity data based on the changes you enter for this row. This action appears only if you specify that a change request is required for updating resource units on the control template.

3 - Delete: The system deletes this resource from the activity. This action appears only if you specify that a change request is required to add and delete resources for the activity resource level on the change control template.

Activity ID

Enter the activity ID for which you want to add, edit, or delete a resource. You can select from activities that are associated with the project for which you are entering this change request.

Resource Name

Displays the name of the resource for the corresponding employee ID in the ID Number field. If you add a generic resource, you must enter a resource name.

Note. If you add a new resource to an activity and that resource is not on the project team, the system adds that resource to the project team when the project manager approves the change request. The system sets the Units field on the Resource Detail page to *100* percent.

ID Number

Enter the employee ID for the resource for which you are entering the change request.

If you select the *1 - Add* action, *Generic* appears in this field. You can either add a generic resource or select from a list of all employee IDs. If you add a generic resource, you must enter a resource name.

If you edit or delete a resource, you can select from a list of resources that are currently assigned to the activity that you selected in the Activity field.

Old Units (%)(old units percentage)

Displays the current units percentage for the resource that you selected. If you are adding a resource, this field is blank.

New Units (%)(new units percentage)

Enter the value to specify the percentage time, based on the project calendar, for which the resource would be allocated to this activity schedule.

Approving Project Changes

Access the Project Change Request approval page (Program Management, Project Management, Project Change Request, Project Change Request).

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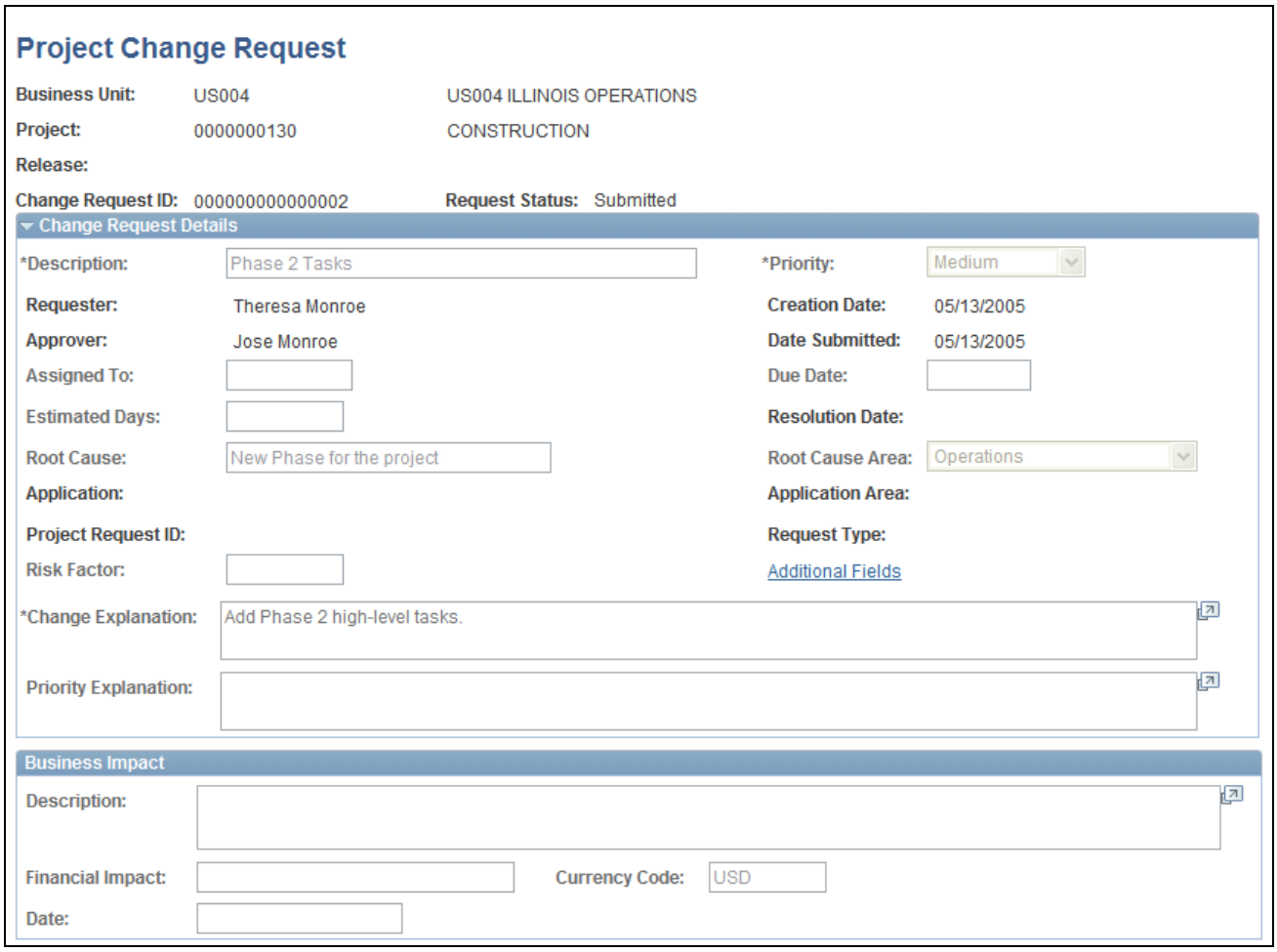

Project Change Request (approval) page (1 of 2)

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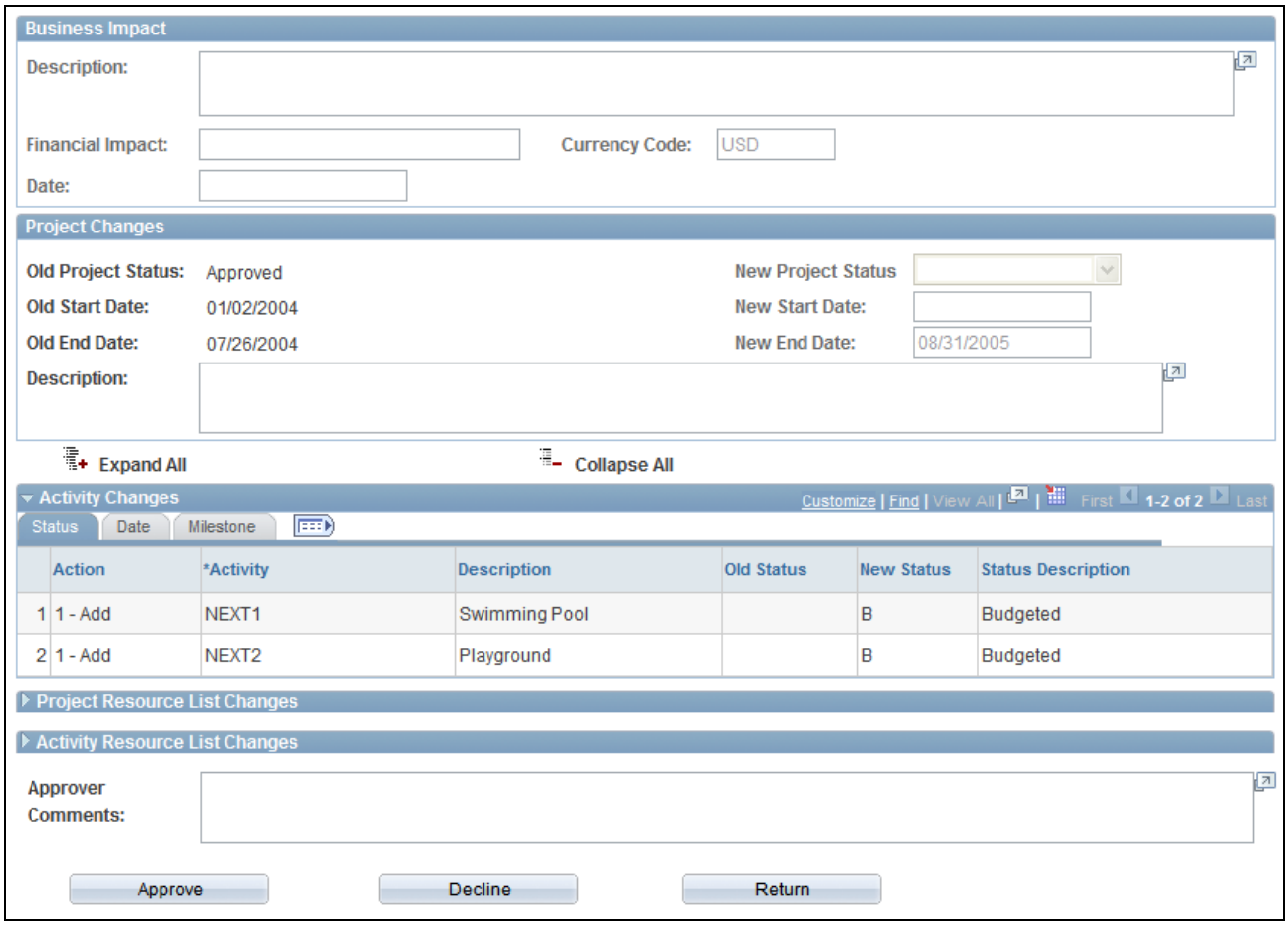

Project Change Request (approval) page (2 of 2)

The Project Change Request approval page is very similar to the Project Change Request page, although much of the approval page is display-only. You must be the project manager to access this approval page. This section highlights the differences on the approval page.

Date Submitted Displays the date the change request was submitted for review.

Approver Comments Enter any comments that explain the action you perform for this change request. If you decline this change request, the systems sends an email notification to the requestor that includes the approver comments.

Approve Click to approve all items on the change request. The system updates the data with the requested changes. The status of the change request changes from *Submitted* to *Approved.*

Decline Click to reject this change request. The system does not make any of the requested changes. If the change is caused by a cross-project dependency, the activity dependency between the two projects is broken. The status of the change request changes from *Submitted* to *Declined.*

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Return Click to return the change request back to the requestor for rework. The status of the change request changes from *Submitted* to *Returned*.

Note. This button does not appear if the change request originated from a cross-project dependency. If you do not want to approve the change request, you must decline the change request to break the dependency and the requestor can open a new request if desired.

Tracking ETC Changes

This section discusses how to:

- Enter ETC changes.
- Submit and approve ETC changes.
- Approve formal ETC change requests.

Page Used to Track ETC Changes

Page Name	*Definition Name*	*Navigation*	*Usage*
Time Report - General Time Report Information	TE_TIME_MAIN	• Employee Self-Service, Travel and Expense Center, Time Report, Create, Create Time Report • Click the General Report Information link on the Time Report - Time Report Summary page.	Create a time report.
Approve Time Report - Time Report Summary	TE_TIME_LINES	Manager Self-Service, Travel and Expense Center, Approvals, Approve Transactions, Time Reports	Review and approve, hold, or deny time reports. **Note.** You must be a time report approver or project manager to access this page.

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Page Name	Definition Name	Navigation	Usage
Project Change Request (approval)	PGM_ETC_CHC_REQ	• Program Management, Project Management, Project Change Request, Project Change Request • Worklist, Worklist, Worklist for <User ID>:<Resource> Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Project Change Request Wrklist work item. • Click Worklist from the PeopleSoft universal navigation header. Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Project Change Request Wrklist work item.	Approve or decline the change request. **Note.** You must be the project manager in order to access this approval page.

Entering ETC Changes

Access the Time Report - General Time Report Information page (Employee Self-Service, Travel and Expense Center, Time Report, Create, Create Time Report).

Use this page, if you are a resource, to log time and optionally update the work you have remaining on an activity.

Enter the new remaining hours to complete in the New Estimate field and submit to trigger ETC change request processing. This field is available only if change requests are required for ETC changes on the change control template and the Allow Entry of Estimate to Complete check box is selected in the Expenses Definition - Business Unit 2 page.

See *PeopleSoft Expenses 9.1 PeopleBook*, "Defining Your Operational Structure for PeopleSoft Expenses," Configuring Business Units for PeopleSoft Expenses.

Submitting and Approving ETC Changes

Access the Approve Time Report - Time Report Summary page (Manager Self-Service, Travel and Expense Center, Approvals, Approve Transactions, Time Reports).

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Use this page if you are a resource supervisor or project manager to approve time reports and submit change requests.

New Estimate Displays the new remaining work estimate that the resource entered. Project managers can update this field only if the PeopleSoft Expenses installation option indicates that project manager approvals are active and you are the project manager of the project for which the resource logged time.

Change Requests Determines if the requirements have been met for a change request. The system automatically sets this field. This field behaves differently based on your role.

- If you are the project manager and the PeopleSoft Expenses installation option indicates that project manager approvals are active, you can update this field.

  Select the check box to indicate that you approve the new estimate. The system generates a formal change request and approves it automatically.

  deselect the check box to indicate that you decline the change request and the system does not create a formal change request. If you do not deselect this check box, the system automatically creates and approves the change request and updates the remaining work for this resource on the activity specified.

- If you are a human resources manager-supervisor, the system automatically selects this field when a change request is required. After you save, the system generates a formal change request and sends a worklist entry and email notification to the project manager.

Approving Formal ETC Change Requests

Access the Change Request approval page (Program Management, Project Management, Project Change Request, Project Change Request).

You use Project Change Request approval page to approve ETC changes. You must be the project manager to access this approval page. This section highlights the difference in the Project Change Request approval page for auto-generated ETC change requests.

Requestor Displays the employee ID for the individual that created the time report.

Priority Displays the priority. All ETC change requests are high priority.

Time Report ID Displays the time report ID from which this change request was triggered.

Period End Date Displays the time report end date from which this change request was triggered.

Change Explanation Displays the text *Estimate to Complete Change.*

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Estimate to Complete Changes

Activity ID	Displays the activity ID for which the user entered the ETC changes.
Start Date and **End Date**	Displays the start and end dates for the activity.
Actual Work	Displays the actual work hours that have been completed to date by the resource on this activity. This includes the hours that were recorded on the current time report.
Old Work	Displays the total for the activity's planned work for that resource. This field does not take into account the ETC changes that were recorded in this change request.
Old Remaining Work	Displays the total remaining work, which is calculated as (Old Work − Actual Work) before taking into account any change to the ETC change request.
New Work	Displays the new planned work for the resource on that activity if you approve the change request. For example, if the Old Work for a resource on an activity is *100* hours and there is an ETC change request that increases the amount of work remaining to be 20 more hours, the New Work value would be *120* hours.
New Remaining Work	Displays the total work that remains on the activity for the resource if you approve the ETC change request. The New Remaining Work value is the same value as the New Estimate value of the resource who appears on the time report.

Tracking Changes to Cross-Project Dependencies

This section discusses how to approve changes to cross-project dependencies.

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Page Used to Approve Cross-Project Dependencies

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Change Request (approval)	PGM_PRJ_CHC_REQ	• Program Management, Project Management, Project Change Request, Project Change Request • Worklist, Worklist, Worklist for <User ID>:<Resource> Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Project Change Request Wrklist work item. • Click Worklist from the PeopleSoft universal navigation header. Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Project Change Request Wrklist work item.	Approve or decline the change request. **Note.** You must be the project manager of the project that contains the successor activity to access this approval page.

Approving Changes to Cross-Project Dependencies

Access the Project Change Request (approval) page (Program Management, Project Management, Project Change Request, Project Change Request).

This section highlights the differences in the Project Change Request approval page for auto-generated cross-project dependencies.

Requested By Displays the name of the resource that changed the predecessor activity date.

Approver Displays the project manager for the project to which the dependent activity belongs.

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Change Explanation Displays the text *Cross Project Dependency Change from <Business Unit>, <Project>, <Activity>* where the business unit, project, and activity values come from the activity that triggered this change request.

Tracking Budget Changes

This section discusses how to:

- Enter budget changes.
- Approve budget changes.

Pages Used to Track Budget Changes

Page Name	*Definition Name*	*Navigation*	*Usage*
Budget Change Request	PGM_BGT_CHC_REQ	• Program Management, Project Management, Budget Change Request, Budget Change Request • Project Costing, Budgeting, Budget Plan, Budget Plan Click the Finalize button on the Finalize tab for a previously finalized budget row.	Enter details regarding the change request and the cost and revenue budget changes to request.

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Page Name	Definition Name	Navigation	Usage
Budget Change Request (approval)	PGM_BGT_CHC_REQ	• Program Management, Project Management, Budget Change Request, Budget Change Request • Worklist, Worklist, Worklist for <User ID>:<Resource> Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Budget Change Request Worklist work item. • Click Worklist from the PeopleSoft universal navigation header. Click the link that displays the concatenation of the business unit, project ID, and change request ID for a Budget Change Request Worklist work item.	Approve, decline, or return the change request. **Note.** You must be the budget approver to access this approval page.

Entering Budget Changes

Access the Budget Change Request page (Program Management, Project Management, Budget Change Request, Budget Change Request).

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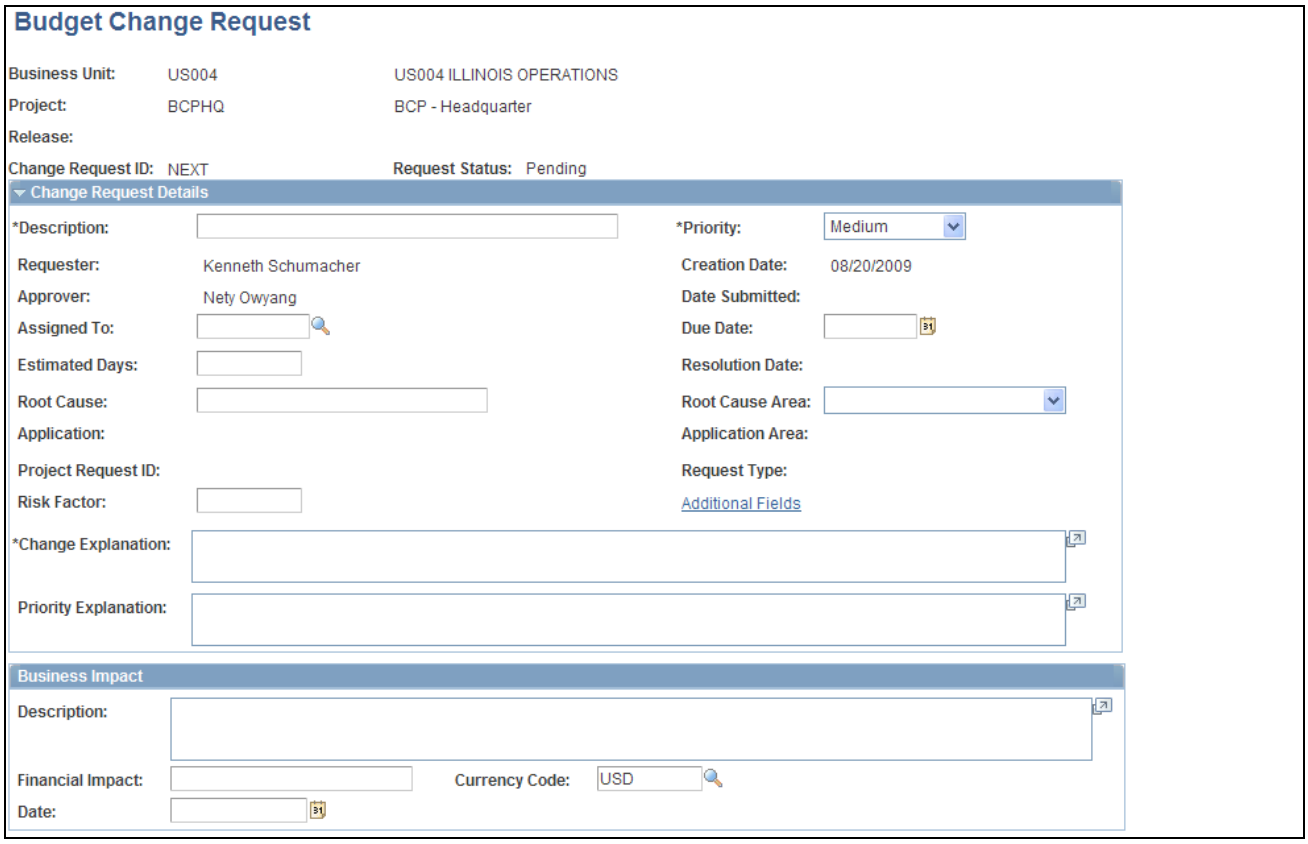
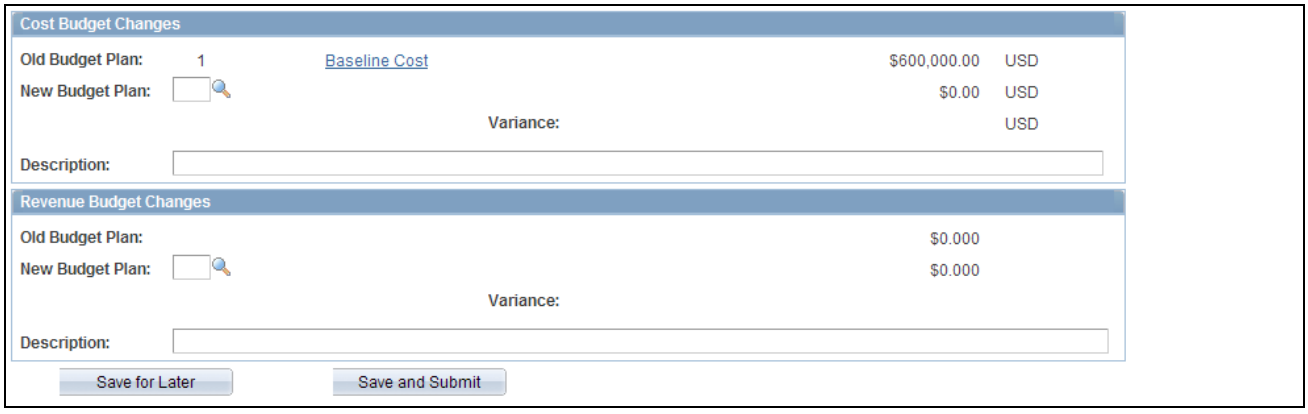


Budget Change Request page (1 of 2)



Budget Change Request page (2 of 2)

The Budget Change Request page behaves in much the same way as the Project Change Request page. These sections highlight the differences on this page.

Save and Submit Click to save the change request and trigger workflow processing. The system sends a worklist entry to the budget approver. A budget approver must exist on the Project General - Program Management page to save and submit this change request. After you click this button, the system changes to change request status to *Submitted.*

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Project Request Details

The Project Request Details group box behaves in much the same way on this page as it does on the Project Change Request page. This section highlights the differences on this page.

Approver Displays the budget approver that is specified on the Project - Program Management page. You must have a budget approver to submit this change request.

Request Type Displays *Budget* as the type of change request.

Cost Budget Change

Enter any changes to a finalized cost budget.

Old Budget Plan Displays the existing active cost budget from the most current finalized cost budget plan. The system also displays the description that appears as a link to the Budget Details page and the total amount of this cost budget plan. The amount, which is displayed in the base currency of the business unit, is the sum of the budget amounts from the Budget Summary record (PC_BUD_SUMMARY) for the given business unit, project ID, budget ID for cost budget types.

New Budget Plan Enter the new cost budget plan to submit to the budget approver. The system also displays the description, that appears as a link to the Budget Details page, and the total amount of this cost budget plan. The amount is the sum of the budget amounts from the Budget Summary record (PC_BUD_SUMMARY) for the given business unit, project ID, budget ID for cost budget types.

Variance Displays the difference between the old budget plan amount and the new budget plan amount in the new budget plan's currency.

Revenue Budget Change

Enter any changes to a finalized revenue budget.

Old Budget Plan Displays the existing active revenue budget from the most current finalized revenue budget plan. The system also displays the description that appears as a link to the Budget Details page and the total amount of this revenue budget plan. The amount, which is displayed in the base currency of the business unit, is the sum of the budget amounts from the Budget Summary record for the given business unit, project ID, budget ID for revenue budget types.

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New Budget Plan Enter the new cost revenue plan to submit to the budget approver. The system also displays the description that appears as a link to the Budget Details page and the total amount of this revenue budget plan. The amount is the sum of the budget amounts from the Budget Summary record for the given business unit, project ID, budget ID for revenue budget types.

Variance Displays the difference between the old budget plan amount and the new budget plan amount in the new budget plan's currency.

Approving Budget Changes

Access the Budget Change Request (approval) page (Program Management, Project Management, Budget Change Request, Budget Change Request).

The Budget Change Request approval page is very similar to the Budget Change Request page, although much of the approval page is display-only. You must be the budget approver to access this approval page. This section highlights the changes for the approval page.

Date Submitted Displays the date on which the change request was submitted for review.

Approver Comments Enter any comments explaining the action you perform for this change request. If you decline this change request, the systems sends an email notification to the requestor that includes the approver comments.

Approve Click to approve all items on the change request. The system enables the Finalize button on the Budget Plan page to allow the user to finalize the newly approved budget plan. The status of the change request changes from *Submitted* to *Approved.*

Decline Click to reject this change request. The system does not make any of the changes requested. The status of the change request changes from *Submitted* to *Declined.*

Return Click to return the change request back to the requestor for rework. The status of the change request changes from *Submitted* to *Returned.*

Viewing and Analyzing Changes

This section discusses how to:

- View changes to a project.
- View change details.
- Analyze change control.

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Pages Used to Enter and Analyze Changes

Page Name	*Definition Name*	*Navigation*	*Usage*
Change Control Monitor	PC_CHC_MONITOR	Program Management, Project Management, Change Control Monitor, Monitor	View a list of changes that occur for projects, budgets, and estimates to complete for which change control is enabled.
Change Control Details	PC_CHC_INFO	• Program Management, Project Management, Change Control Monitor, Details • Program Management, Project Management, Change Control Monitor, Monitor Click the Change Control Details icon.	View details of a change, including comments that are entered on the Change Control User Input page. You can also add additional comments regarding the change.
Change Control Analysis	PC_EA_CHG_CONTROL	Program Management, Interactive Reports, Change Control	Use search criteria to display a list of changes in the scope of a project.

Viewing Changes to a Project

Access the Change Control Monitor page (Program Management, Project Management, Change Control Monitor, Monitor).

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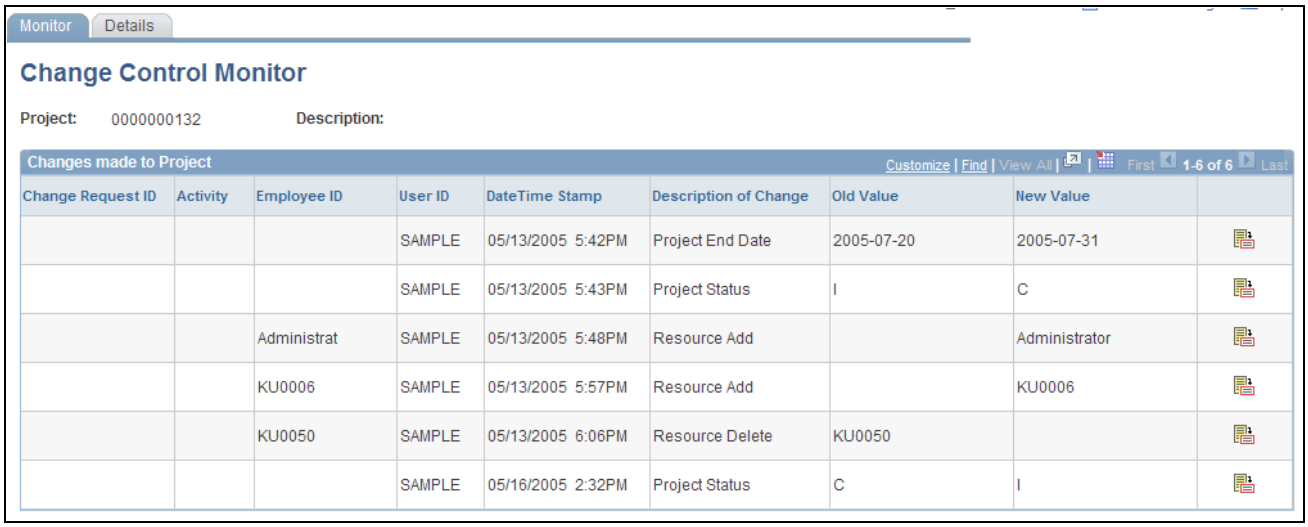

Change Request ID	Activity	Employee ID	User ID	DateTime Stamp	Description of Change	Old Value	New Value	
			SAMPLE	05/13/2005 5:42PM	Project End Date	2005-07-20	2005-07-31	
			SAMPLE	05/13/2005 5:43PM	Project Status	I	C	
		Administrat	SAMPLE	05/13/2005 5:48PM	Resource Add		Administrator	
		KU0006	SAMPLE	05/13/2005 5:57PM	Resource Add		KU0006	
		KU0050	SAMPLE	05/13/2005 6:06PM	Resource Delete	KU0050		
			SAMPLE	05/16/2005 2:32PM	Project Status	C	I	

Change Control Monitor page

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

Click the corresponding Change Control Details icon to view the details of that change.

Note. The change control option to monitor changes to resource dates does not show the net change to a resource's schedule if the resource has multiple schedules and only one schedule line was modified. This page displays a change in start date or end date on one schedule line at a time. The system also only checks for date changes; it does not track changes when you delete a schedule line.

Viewing Change Details

Access the Change Control Details page (Program Management, Project Management, Change Control Monitor, Details).

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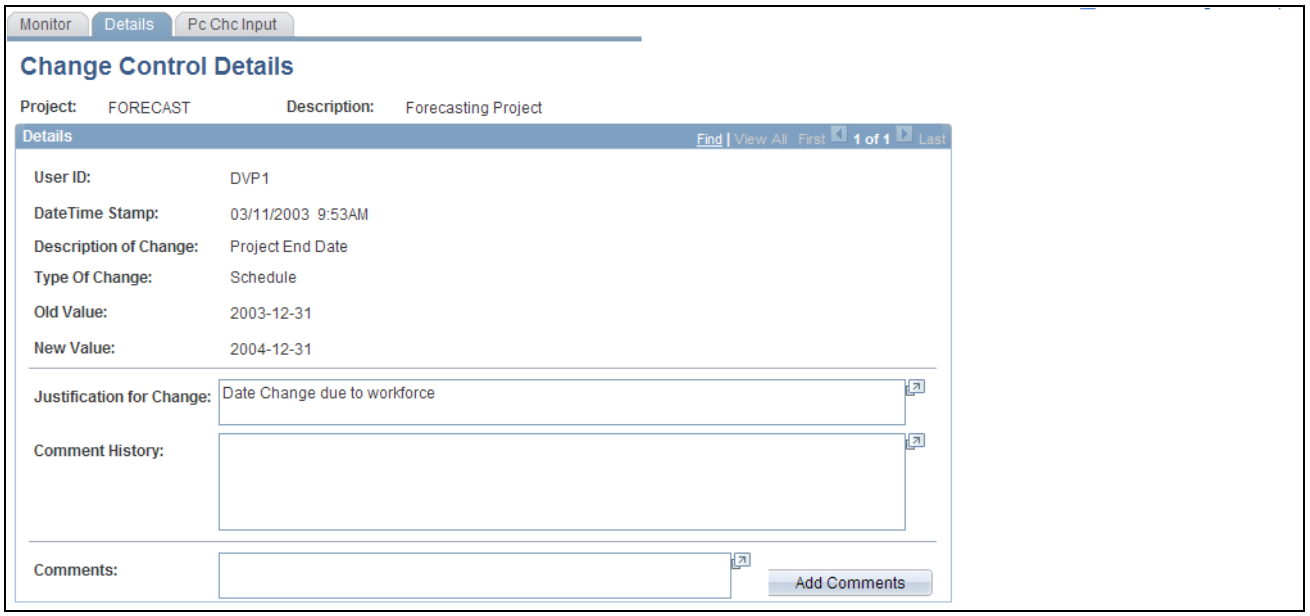
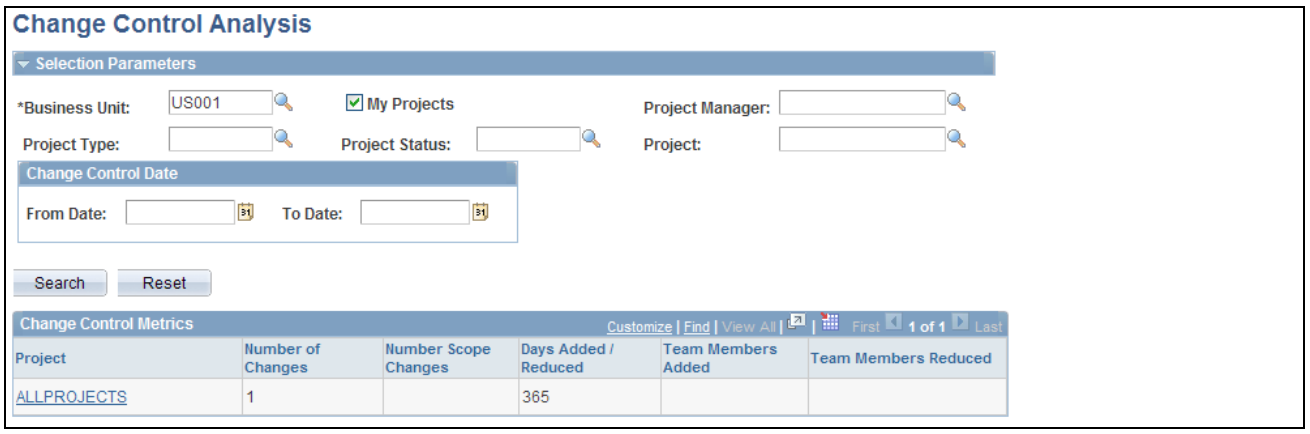


Change Control Details page

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. Click the Add Comments button to move text from the Comments field to the Comment History field, where the text appears with the date of input and the user ID who enters the comment.

Analyzing Change Control

Access the Change Control Analysis page (Program Management, Interactive Reports, Change Control).



Change Control Analysis page

Enter the necessary search criteria to filter the results to display the projects that have change control data. 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.

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Change Control Metrics

Project	Click a project name link to access the project's Change Control Monitor page.
Number of Changes	Displays the total number of changes that are recorded for the project.
Number Scope Changes	Displays the number of change control rows for the project for which the type of change is *Scope*.
Days Added/Reduced	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	Displays the number of team members who are added to the project.
Team Members Reduced	Displays the number of team members who are removed from the project.

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Chapter 17

Reporting Project Status

This chapter provides an overview of status reports and discusses how to:

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

Understanding Status Reports

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 successful project completion.

After you create a project, project managers can designate how often to generate status reports. By setting up reporting periods, project managers determine when status reports begin and end and whether reports are required at the project or activity levels. Project team members then create status reports for each period that the project manager defined.

You can send email notifications to remind project team members that status reports are due, to notify individuals that status reports are overdue, and to customers with a consolidated report.

Defining Status Reports

This section discusses how to:

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

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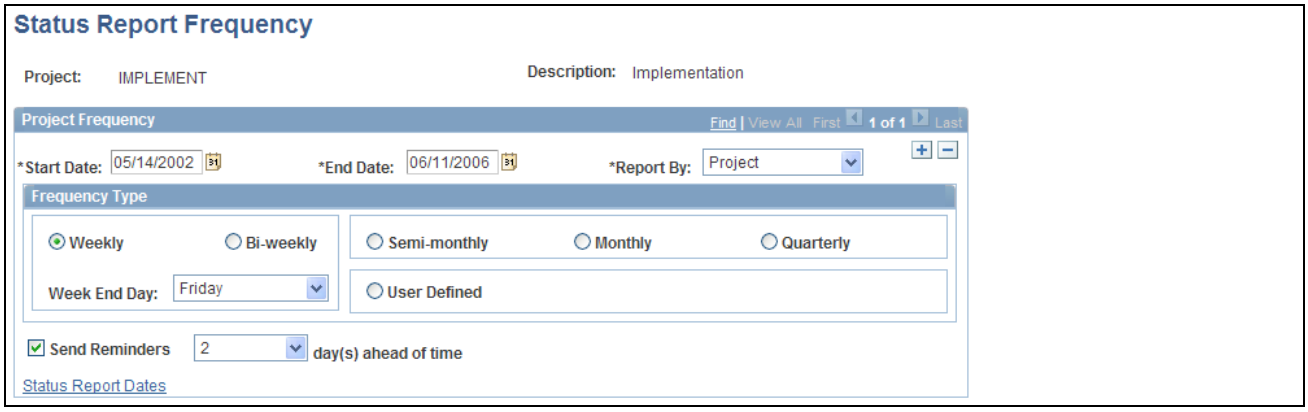
Pages Used to Define Status Reports

Page Name	Definition 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 instead defined by the user.
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 (Set Up Financials/Supply Chain, Product Related, Program Management, Project Options, Status Report Frequency).

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 status reports for this project.

Note. These dates must fall within the project's start and end dates.

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Report By Select *Project* to record status reports at the project level. Select *Activity* to record status reports at the activity level.

Frequency Type

Select a time period to set up the frequency for status reports for this project. If you select Weekly or Bi-weekly, select a value in the Week End Day field to indicate which day is the final day of the reporting week. You can also designate the frequency type as semimonthly, monthly, quarterly, or user-defined.

User Defined Select this option when you require a nonstandard frequency for status reports. When you select this frequency type, the User Defined Dates link appears.

User Defined Dates Click to access the User Defined Dates page to specify report due dates. This link is available only if the User Defined frequency type is selected. 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.

Send Reminders [x] day(s) ahead of time Select to send an email to project team members to remind them that a status report is due. Send the reminder either *1, 2,* or *3* days prior to the status report deadline. The system automatically initiates the Status Report Reminder Application Engine process (PC_SR_REMIND) to send the email notifications.

Status Report Dates Click this link to access the Status Report Dates page, which calculates start, end, and due dates for status reports. This link does not appear if you select a user-defined frequency type.

Specifying User Report Due Dates

Access the User Defined Dates page (click the User Defined Dates link on the Status Report Frequency page).

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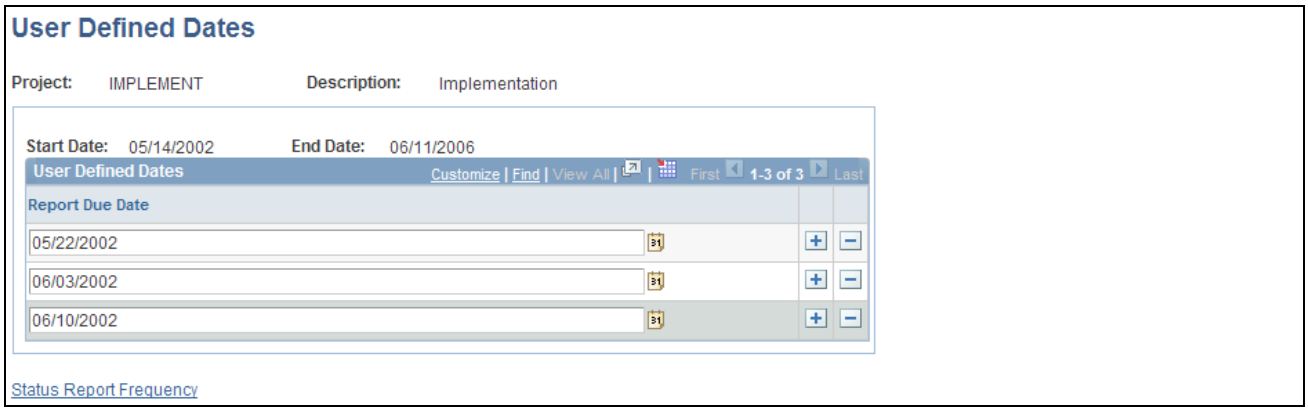
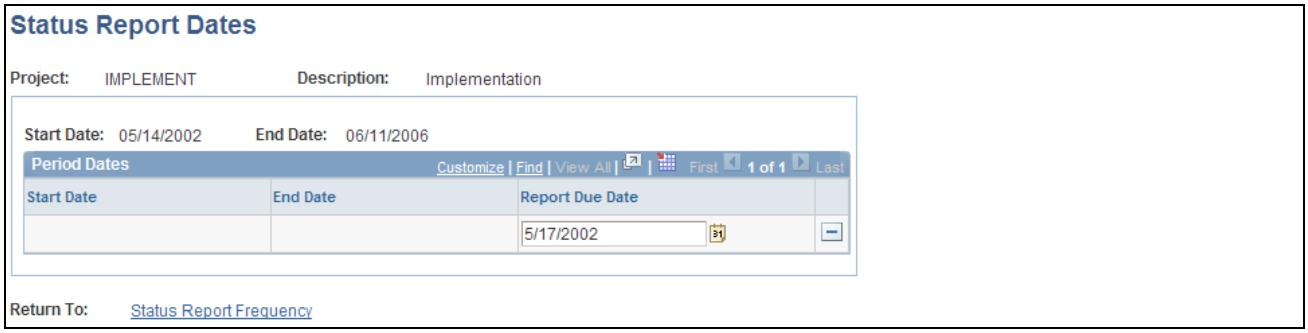


User Defined Dates page

Enter a <*Report Due Date*> for each date that you want users to submit a status report.

Determining Status Report Dates

Access the Status Report Dates page (click the Status Report Dates link on the Status Report Frequency page).



Status Report Dates page

The system calculates the start, end, and due dates for each status report in the project, based on parameters from the Status Report Frequency page. For example, the page above displays calculated dates for weekly reports in which the week ends on Friday.

You can change the values in the Report Due Date column as long as a user has not completed a status report for that period. When a user has completed a status report for a particular period, the Report Due Date field for that period is display-only.

Entering Status Reports

This section discusses how to:

- Create status reports.
- Enter status report details.

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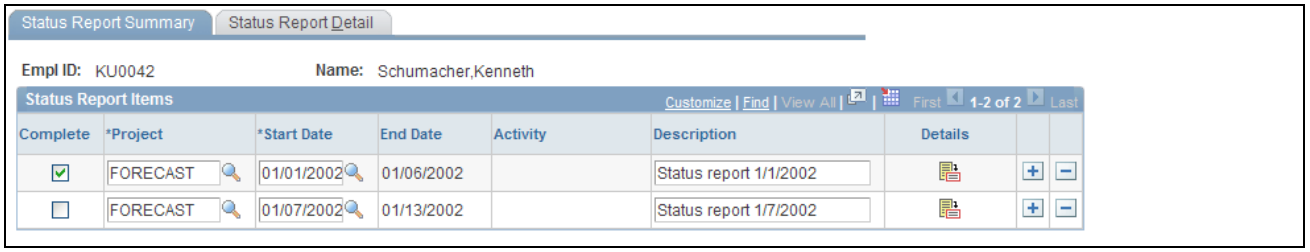
Pages Used to Enter Status Reports

Page Name	Definition Name	Navigation	Usage
Status Report Summary	PC_SR_SUM	Program Management, Project Management, Add/Update Status Report, Status Report Summary	Enter status reports.
Status Report Detail	PC_SR_SUM_DTL	• Program Management, Project Management, Add/Update Status Report, Status Report Detail • Click the Details icon on the Status Report Summary page.	Enter status report details such as comments, and file attachments.

Creating Status Reports

Access the Status Report Summary page (Program Management, Project Management, Add/Update Status Report, Status Report Summary).



Status Report Summary page

Complete Select to notify the project manager that you finished the status report for the reporting period. The project manager can only review reports that you mark complete.

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

Activity Select the activity appropriate for this status report. You can only enter an activity when status reports are required at the activity level on the Status Report Frequency page.

Click the Details icon to access the Status Report Detail page, where you can add more information for the reporting period to the status report.

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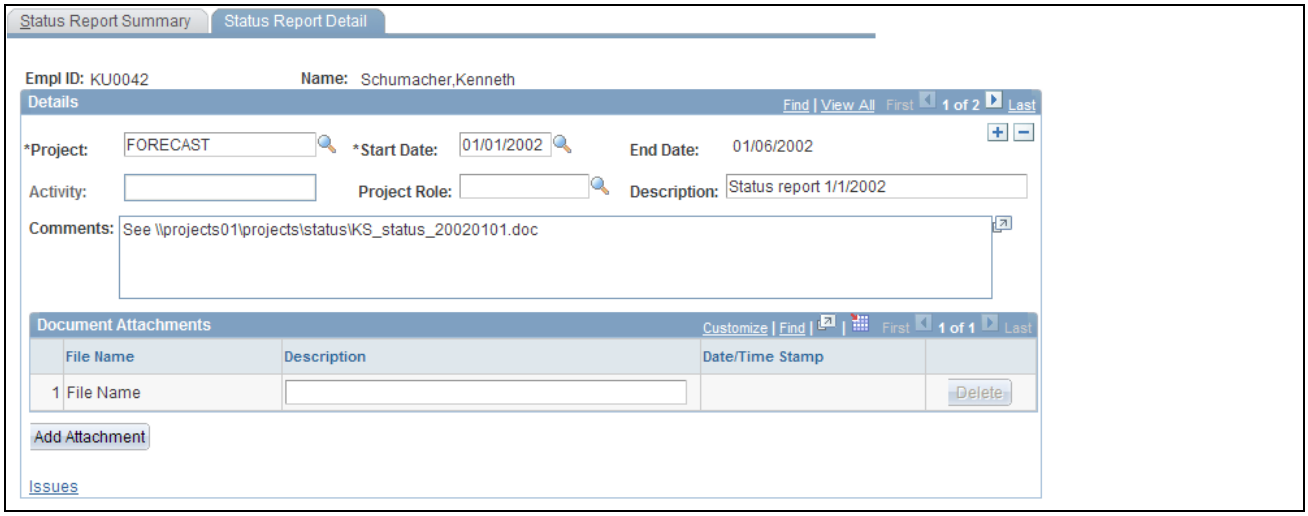
Entering Status Report Details

Access the Status Report Detail page (Program Management, Project Management, Add/Update Status Report, Status Report Detail).



Status Report Detail page

Start Date and **End Date** — Enter the start date for this status report. The system automatically populates the End Date value based on the end dates that are defined on the Status Report Frequency page. If you enter a start date on the Status Report Summary page, the start date and end date appear by default on the Status Report Detail page.

Activity — Select the activity appropriate for this status report. You can only enter an activity when status reports are required at the activity level on the Status Report Frequency page.

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

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

Issues — Click to access the Issue Management component to view, update, or add issues that are related to the status report.

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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	*Definition Name*	*Navigation*	*Usage*
Completed Status Reports	PC_SR_COMPLETE	Program Management, Project Management, Review Status Reports, Completed Status Reports	View a list of completed status reports by employee.
Status Report Details	PC_SR_VIEW_DTL	Click the Details icon on the Completed Status Reports page.	View the details of completed status reports.
Consolidate for Customer	PC_SR_CONS_CUST	Click the Consolidate for Customer button on the Completed Status Reports page.	Send an email notification that contains a consolidated report of all the status reports that pertain to a project and start date to customers.
Incomplete Status Reports	PC_SR_INCOMPLETE	Program Management, Project Management, Review Status Reports, Incomplete Status Reports	View a list of project team member and send email reminders to individuals who have not completed their status reports by the due date.
Status Report Reminder	PC_SR_NOTIFY	Click the Send Reminder button on the Incomplete Status Reports page.	Send email reminders to project team members with incomplete status reports.

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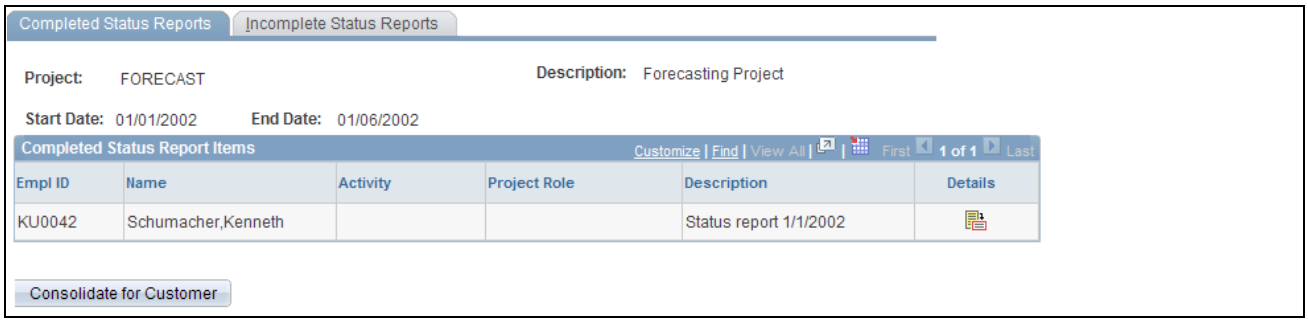
Page Name	Definition Name	Navigation	Usage
Status Report Reminder run control	PC_SR_REMINDER	Set Up Financials/Supply Chain, Product Related, Program Management, Project Options, Status Report Reminder	Specify run control parameters to run the Status Report Reminder Application Engine process, which sends email notifications to project team members to remind them about their status report due dates.

Reviewing Completed Status Reports

Access the Completed Status Reports page (Program Management, Project Management, Review Status Reports, Completed Status Reports).



Completed Status Reports page

This page displays a list of status reports for the selected project and start date that have the Complete option selected on the Status Report Summary page.

	Click the Details icon to access the Status Report Details page and view additional information that pertains to the status report.
Consolidate for Customer	Click to access the Consolidate for Customer page, where the system compiles all completed status reports for the selected project and start date.

Reviewing Completed Status Report Details

Access the Status Report Details page (click the Details icon on the Completed Status Reports page).

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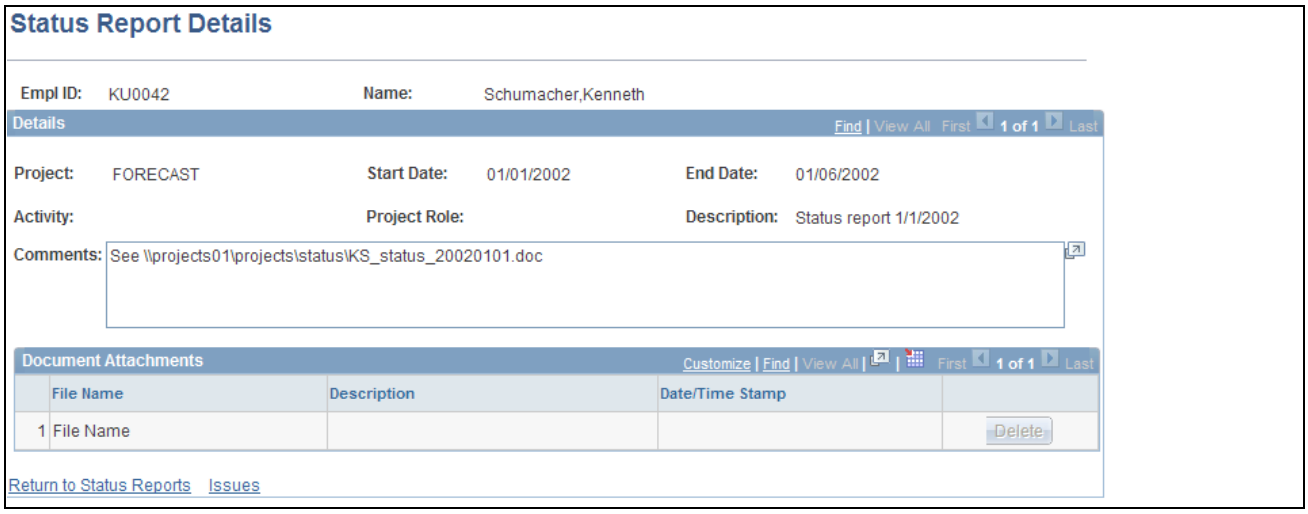

Status Report Details page

You can view and delete file attachments, but all other data is display-only. This page is typically used by project managers.

Document Attachments Displays a list of file attachments pertaining to the status report. To open the attachment, click the filename, which is a link to the document.

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

Consolidating Status Reports for Customers

Access the Consolidate for Customer page (click the Consolidate for Customer button on the Completed Status Reports page).

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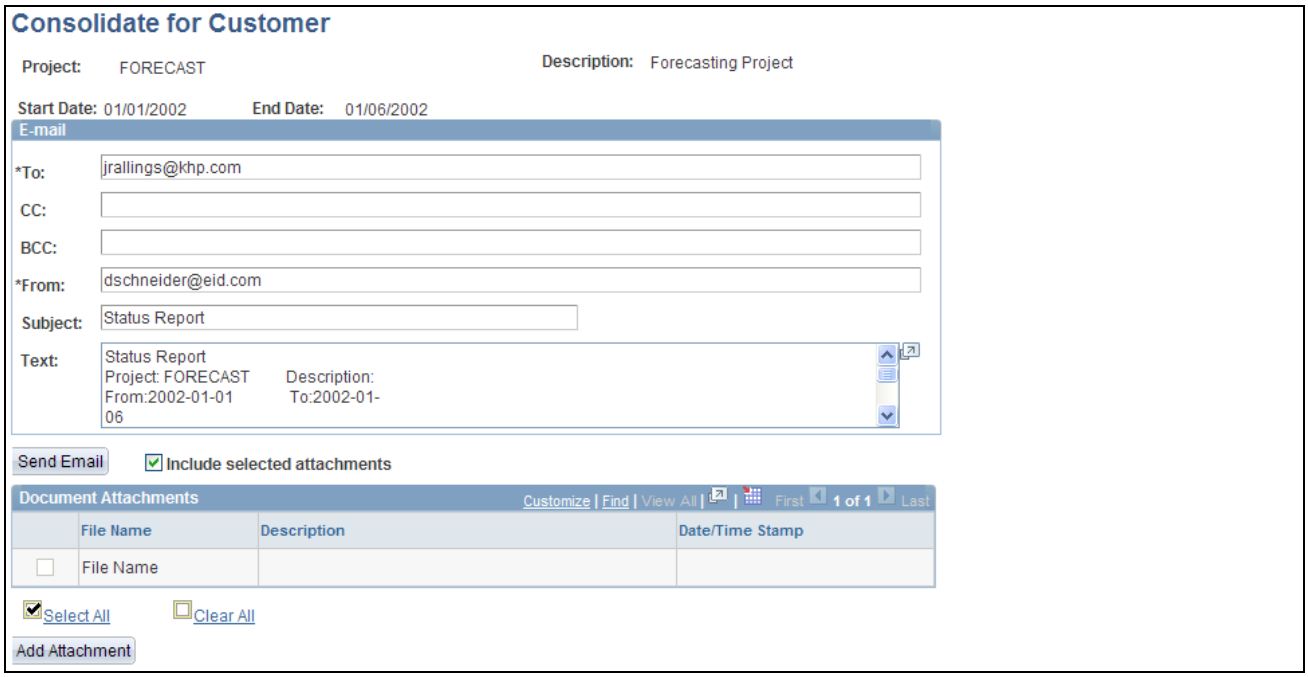

Consolidate for Customer page

Enter the email addresses for the customers to whom you want to send this status report.

Subject The system automatically populates this field with the text *Status Report*, which can be edited.

Text Contains details from all of the completed team member status reports for the selected project and start date. You can edit the text before sending the consolidated report to customers, but the edits do not modify the original employee status reports.

Send Email Click to send the status report to the recipients you specify in the To, CC, and BCC fields.

Include selected attachments Select to attach the selected files from the Document Attachments grid to the email.

Document Attachments

The Document Attachments grid lists all the files that have been attached to the status reports.

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

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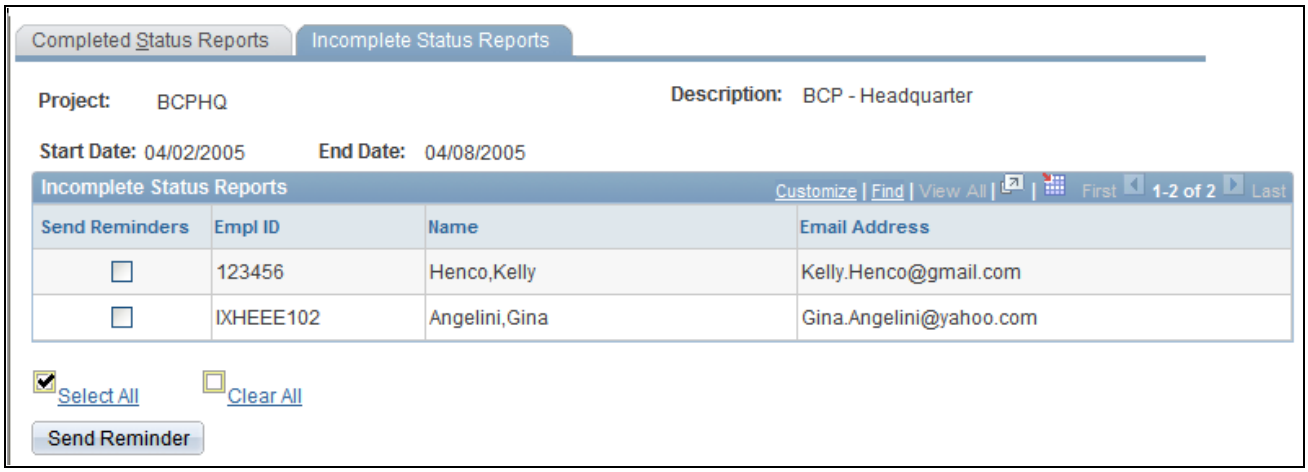
Add Attachment Click to append a file that pertains to the consolidated status report. When the file is uploaded, the file name appears in the Document Attachments grid.

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

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

Reviewing Lists of Incomplete Status Reports

Access the Incomplete Status Reports page (Program Management, Project Management, Review Status Reports, Incomplete Status Reports).



Incomplete Status Reports page

Select the individuals you would like to send an email notification to in the Send Reminders column. 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 (click the Send Reminder button on the Incomplete Status Reports page).

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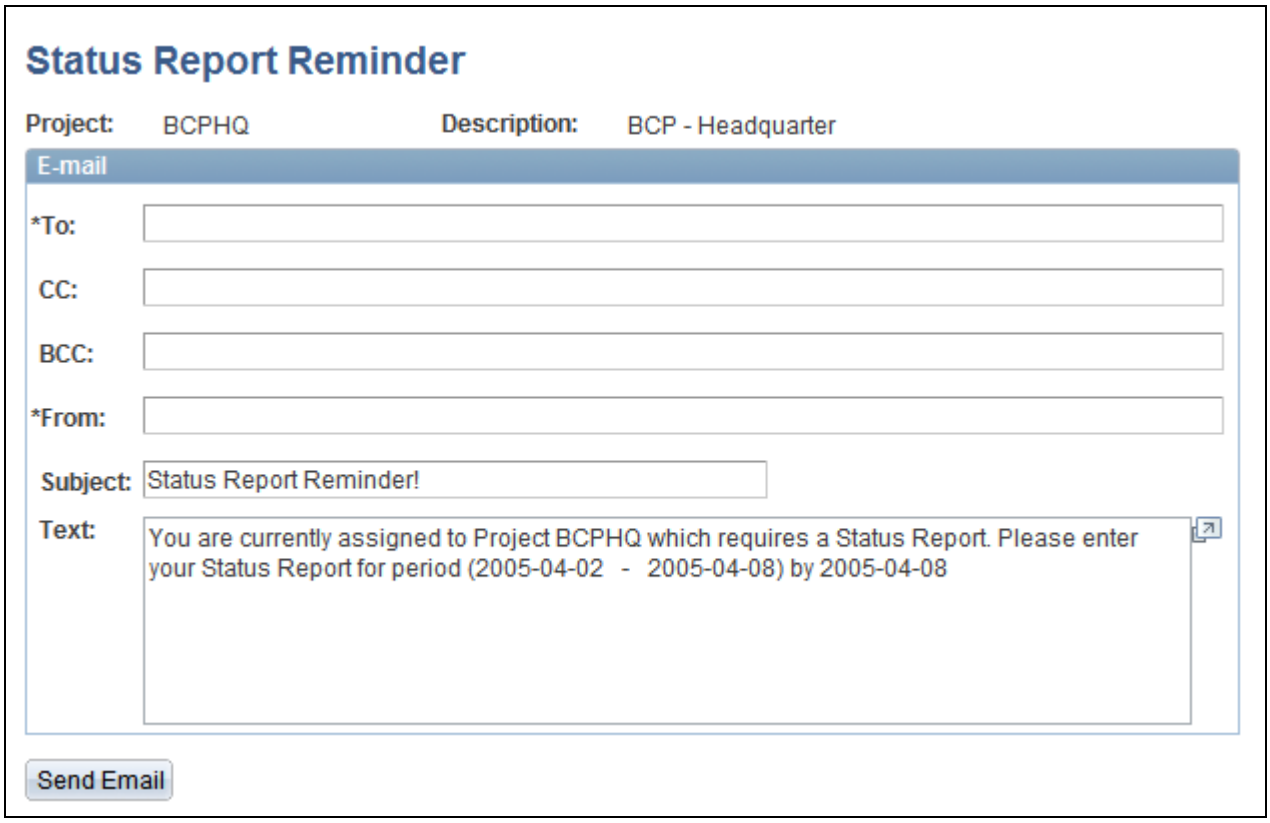

Status Report Reminder page

Subject This field is automatically populated with the text: *Status Report Reminder!*, which you can edit.

Text Displays text that the system automatically populates with information from the status report for which the employee is being reminded. You can edit the text before sending the email. This is typically done by project managers.

Send Email Click to send the email to the specified employees.

Sending Automatic Reminders

Access the Status Report Reminder run control page (Set Up Financials/Supply Chain, Product Related, Program Management, Project Options, Status Report Reminder).

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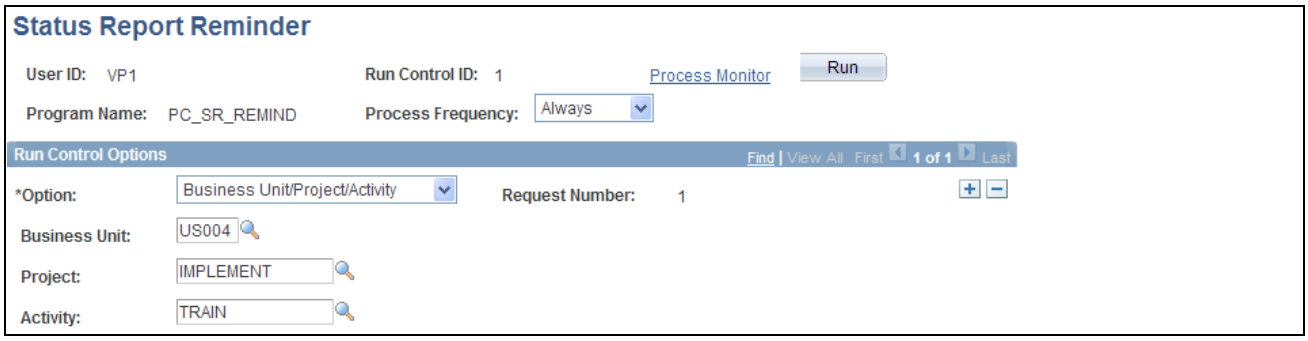

Status Report Reminder page

Option

Select from one of these options:

All: Sends email notifications to all project teams members across all business units.

Business Unit: Sends email notifications to all project team members within the business unit that you specify in the Business Unit field.

Business Unit/Project: Sends email notifications to all project teams members within the business unit and project combination that you enter in the Business Unit and Project fields.

Business Unit/Project/Activity: Sends email notifications to all project team members that are on the business unit, project, and activity combination that you enter in the Business Unit, Project, and Activity fields.

See Also

Chapter 17, "Reporting Project Status," Defining Status Report Frequency, page 312

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Chapter 18

Tracking Deliverables

This chapter provides an overview of deliverables and discusses how to define and review deliverables.

Understanding Deliverables

You should to be able to determine the progress of a project at different levels of the project cycle. In addition to the tools that track programs and projects, PeopleSoft Program Management enables you to define and monitor deliverables at the activity level. Deliverables data is displayed on the following pages:

- Manager Workbench page (PC_MGR_WORKBENCH)
- Resource Workbench page (PC_RSRC_WKBNCH)
- Review Program page (PGM_REVIEW_PROG)

After project managers complete project planning and define the deliverables, resources need to be notified of assigned deliverables. You can enable deliverables workflow on the Installation Options - Program Management page to trigger notification to the resources of all deliverable assignments.

See *PeopleSoft Application Fundamentals 9.1 PeopleBook*, "Setting Installation Options for PeopleSoft Applications," Defining Program Management Installation Options.

Defining and Reviewing Deliverables

This section discusses how to:

- Define activity deliverables.
- View deliverable details.

Pages Used to Define and Review Deliverables

Page Name	*Definition Name*	*Navigation*	*Usage*
Deliverables Summary	PROJ_ACT_DELV_01	Program Management, Project Management, Review Deliverables	Define and view a list of deliverables that are associated with a particular activity.

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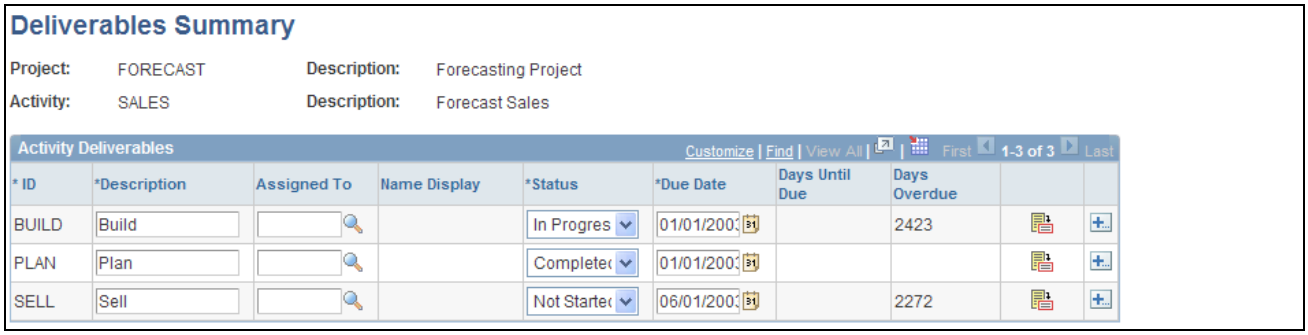
Page Name	Definition Name	Navigation	Usage
Deliverable Detail	PROJ_ACT_DELV_02	• Program Management, Project Management, View/Update Deliverables • Click the Deliverable Detail button on the Deliverables Summary page.	Define and view the various elements of a deliverable.

Defining Activity Deliverables

Access the Deliverables Summary page (Program Management, Project Management, Review Deliverables).



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 you select the employee ID, the employee's name appears in the Name Display column.

If you have enabled deliverables workflow, each time you assign or change a resource for a deliverable and save, the system prompts you to trigger workflow. The system creates a worklist notification and sends an email to the assigned resource using the resource's email address from the Resource Detail page. If the employee does not have an email address entered on the Resource Detail page, the system uses the email address of the user ID that is associated with the employee. If no email address is available, the system will send only the worklist notification.

Status Select from these values: *Completed*,*In Progress*, or *Not Started.*

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

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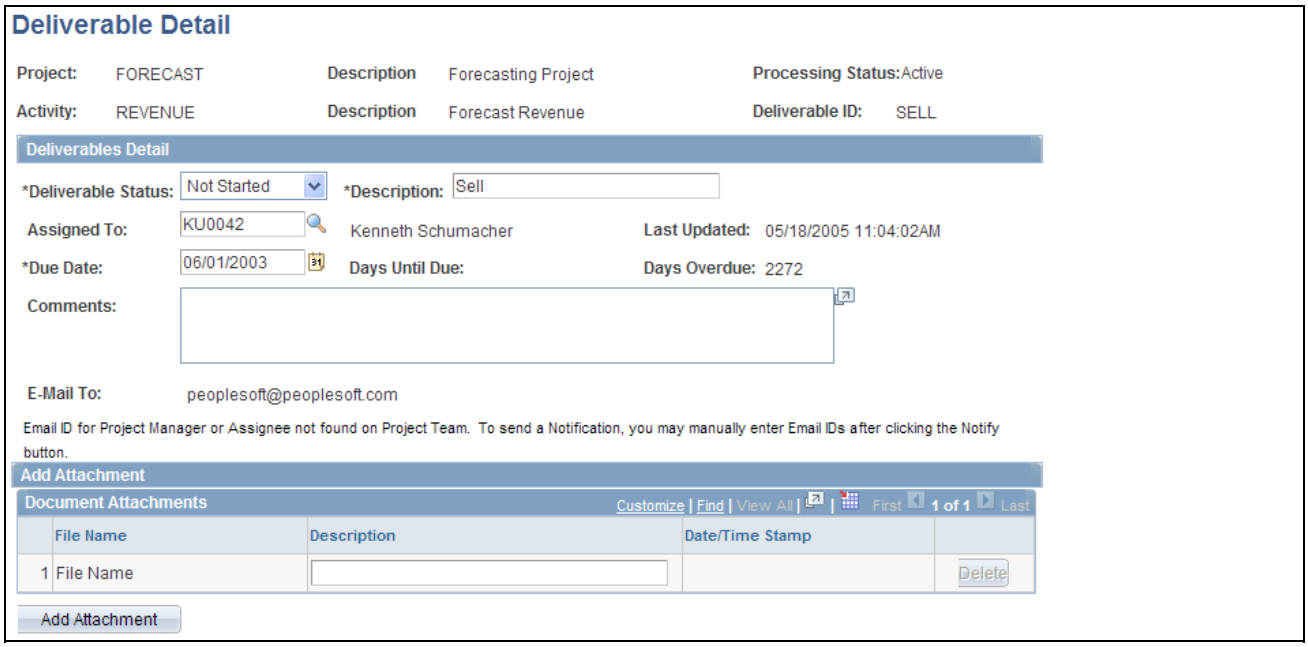
Days Until Due Displays the system-calculated number of days remaining between the current date and the due date.

Days Overdue Displays the system-calculated 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 (Program Management, Project Management, View/Update Deliverables).



Deliverable Detail page

Deliverables Detail

Assigned To Select the employee ID of the person who is assigned to complete the deliverable.

If you have enabled deliverables workflow, each time you assign or change a resource for a deliverable and save, the system prompts you to trigger workflow. The system creates a worklist notification and sends an email to the assigned resource using the resource's email address from the Resource Detail page. If the employee does not have an email address entered on the Resource Detail page, the system uses the email address of the user ID that is associated with the employee. If no email address is available, the system will send only the worklist notification.

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E-mail To Displays the assigned resource's email address from the Resource Detail page. If the Assigned To resource does not have an email address entered on the Resource Detail page, the system displays the email address of the User ID that is associated to this resource. If the project manager has an email ID specified on the Resource Detail page, the system includes that email in the Email To field. If the project manager does not have an email ID on the Resource Detail page, the system does not include it.

Comments Enter any text to explain or clarify the deliverable.

Document Attachments

Add Attachment Click to browse for the file to attach to this deliverable.

Note. You must have the File Attachment option set on the Installation Options - Project Costing page for attachments to work.

See *PeopleSoft Asset Lifecycle Management, Enterprise Service Automation, Financial Management, Staffing Front Office, and Supply Chain Management Product-Specific Installation Instructions* located on Oracle's PeopleSoft My Oracle Support website.

File Name Displays the name of the attached file. Click to access the file.

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Chapter 19

Analyzing Project Data

This chapter discusses how to:

- Review programs and projects.
- View earned value.
- View and load estimate to complete transactions.
- View forecast to complete variance.

See Also

Chapter 10, "Scheduling and Managing Resources," Analyzing Resource Lists, page 210

Chapter 16, "Controlling Project Changes," Analyzing Change Control, page 309

Chapter 21, "Analyzing Resource Utilization," page 389

PeopleSoft Project Costing 9.1 PeopleBook, "Reviewing and Adjusting Project Costs"

PeopleSoft Project Costing 9.1 PeopleBook, "Analyzing Projects," Performing Flexible Analysis

Reviewing Programs and Projects

This section provides an overview of the manager workbench and discusses how to:

- Review programs and projects.
- Generate the Review Program report.
- View the enterprise program tree.
- Review project health using the manager workbench.
- Review activity health using the manager workbench.

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Understanding the Manager Workbench

The Manager Workbench is organized into two pages. Managers can view information about a project on the Manager Workbench page and click the Activity tab to view workbench information about the project's activities. The project Manager Workbench page contains information about the project manager, project status and project processing status. Additionally, the Manager Workbench displays health indicators for overall project and activity health and for each scorecard component. You can define an option at the business unit-level to manually enter or automatically calculate project health indicators for project overall, schedule, budget, resources, issues, and risks. You can override this option at the project level. The system displays these colored indicators based on the project or activity health:

Good	Indicates good health for the project or activity health attributes.
Fair	Indicates fair health for the project or activity health attributes.
Poor	Indicates poor health for the project or activity health attributes.

The Manager Workbench also contains these collapsible group boxes:

- Scorecard: Information about the schedule, budget, resources, issues, and risks.
- Milestones: List of the project milestone activities
- Top 5 Issues: List of the top five unresolved issues.
- Top 5 Risks: List of the top five risks based on risk status and priority.
- Change Requests: List of the five most recently approved project change requests, the five oldest unapproved change requests, and change control statistics.
- Project Exceptions: Information on late activities, unassigned activities, upcoming activities, overloaded resources, activity and assignment conflicts, and late deliverables.

You can expand and collapse the group boxes, all at once or individually, to review detailed information about the health of the project.

On the activity tab of the Manager Workbench, you can select the project activity that you want to review. The workbench contains information about the activity owner, activity status, and activity processing status. It includes activity health indicators that the system calculates each time that you access the page by using the most recent data on the activity schedule, budget, resources, issues, risks, and deliverables. It also lists the top five issues and risks for the activity.

From both of the Manager Workbench pages you can navigate to other components in PeopleSoft Program Management and PeopleSoft Project Costing to view or modify information about the project or activity.

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Pages Used to Review Programs and Projects

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Program	PGM_REVIEW_PROG	Program Management, Program Tools, Review Program	Displays detailed information about projects and programs on the enterprise program tree and enables drilling down to each program and project.
Review Program Report	RUN_PGM1000	Program Management, Program Tools, Review Program Click the Run Review Program Report link on the Review Program page.	Specify run control parameters to create report the Review Program report (PGM1000).
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.
Manager Workbench	PC_MGR_WORKBENCH	Program Management, Project Management, Manager Workbench	View a project summary and health data.
Manager Workbench - Activity	PGM_MGRWBENCH_ACT	Program Management, Project Management, Manager Workbench Select the Activity tab.	View activity summary and health data.

Reviewing Programs and Projects

Access the Review Program page (Program Management, Program Tools, Review Program).

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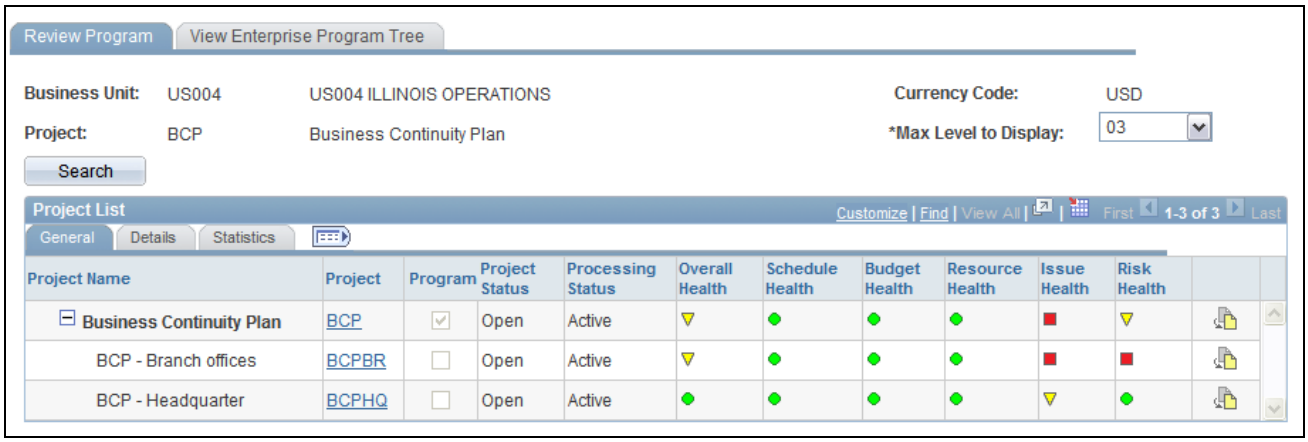

Review Program page

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

Search Click to display a list of programs and projects. The size of the list depends on the number of levels that you specify in the Max Level to Display field.

Project List - General

Project Name Displays all of the programs and projects that are part of this program in a hierarchical format.

Project Display the project ID of the program or project as a link. Click a project ID to access the project General Information page of the Project General (PROJECT_GENERAL) component, where you can view or update details of the program or project.

Program Indicates whether the project is a program. If the check box is selected, the project is a program. If the check box is deselected, the project is not a program.

Project Status Displays the current project status.

Processing Status Displays the current processing status.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up PeopleSoft Project Costing Control Data," Project and Processing Statuses.

Overall Health, Schedule Health, Budget Health, Resource Health, Issue Health, and **Risk Health** Displays a visual indicator to determine the health rating for the project. You can hover your mouse over the icon to display the date that the health was last updated.

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Click the Link to Project Request icon 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 icon for a project that 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—percent complete, start and end dates, category, application, application area and actual and budget cost data.

Percent Complete Lists the project percent complete.

Start Date and **End Date** Lists the start and end dates for the program or project.

Category Lists the category for the program or project.

Application Area Lists the application area for the program or project.

Application Lists the application for the program or project.

Planned Cost Budget Lists the cost budget for projects in pending processing status. The system selects the budget data from the Budget Summary table (PC_BUD_SUMMARY). The budget data that appears is data that is not yet 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 with active or inactive processing status. The system select the budget data from the Activity Summary table (PC_ACTIVITY_SUM). 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.

Cost Variance Displays the difference between the cost budget and cost actuals, which is calculated as *(Budget Cost) – (Actual Cost).*

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Project List - Statistics

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 exist for the project.

Percent Critical Lists the percentage of project issues that are critical.

Total Deliverables Lists the total number of deliverables there are for the project.

Overdue Deliverables Lists the number of project deliverables that are late.

Percent Overdue Lists the percentage of deliverables that are late.

Total Risks Lists the total number of risks that exist for the project.

No Action Plan Risk Lists the number of project risks with no action plan.

Percent No Action Lists the percentage of risks that have no action plan.

Project Manager Displays the current program or project manager.

Go To

Run Review Program Report Click to transfer to the Review Program Report page, where you can enter parameters to run the Review Program Details Application Engine process (PGM_REVW_AE).

Program Budget Analysis Click to transfer to the Program Budget Analysis page, where you can view the program budget compared with the rolled-up project budgets.

Note. You must enable the PeopleSoft Analytic Calculation Engine to view the Program Budget Analysis page.

See "Configuring and Starting Analytic Servers" in *PeopleTools PeopleBook: System and Server Administration*

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Budgeting Project Costs and Revenue"

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Generating the Review Program Report

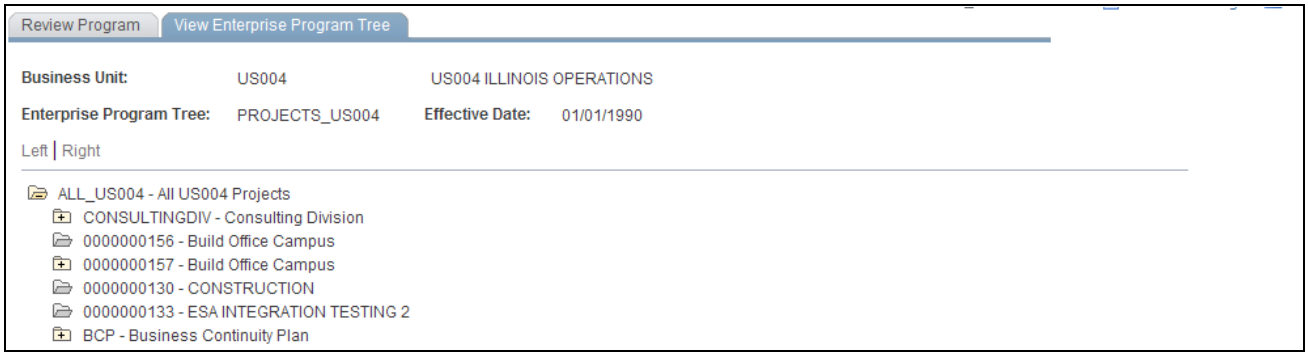
Access the Review Program Report page (click the Run Review Program Report link on the Review Program page).

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 that meet 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 the Review Program Details Application Engine process (PGM_REVW_AE) and the Review Program report (PGM1000).

Viewing the Enterprise Program Tree

Access the View Enterprise Program Tree page (Program Management, Program Tools, Review Program, View Enterprise Program Tree).



View Enterprise Program Tree page

This page is a display-only view of the enterprise program tree that is 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 to access the Tree Manager page on which you can edit the tree.

Reviewing Project Health Using the Manager Workbench

Access the Manager Workbench page (Program Management, Project Management, Manager Workbench).

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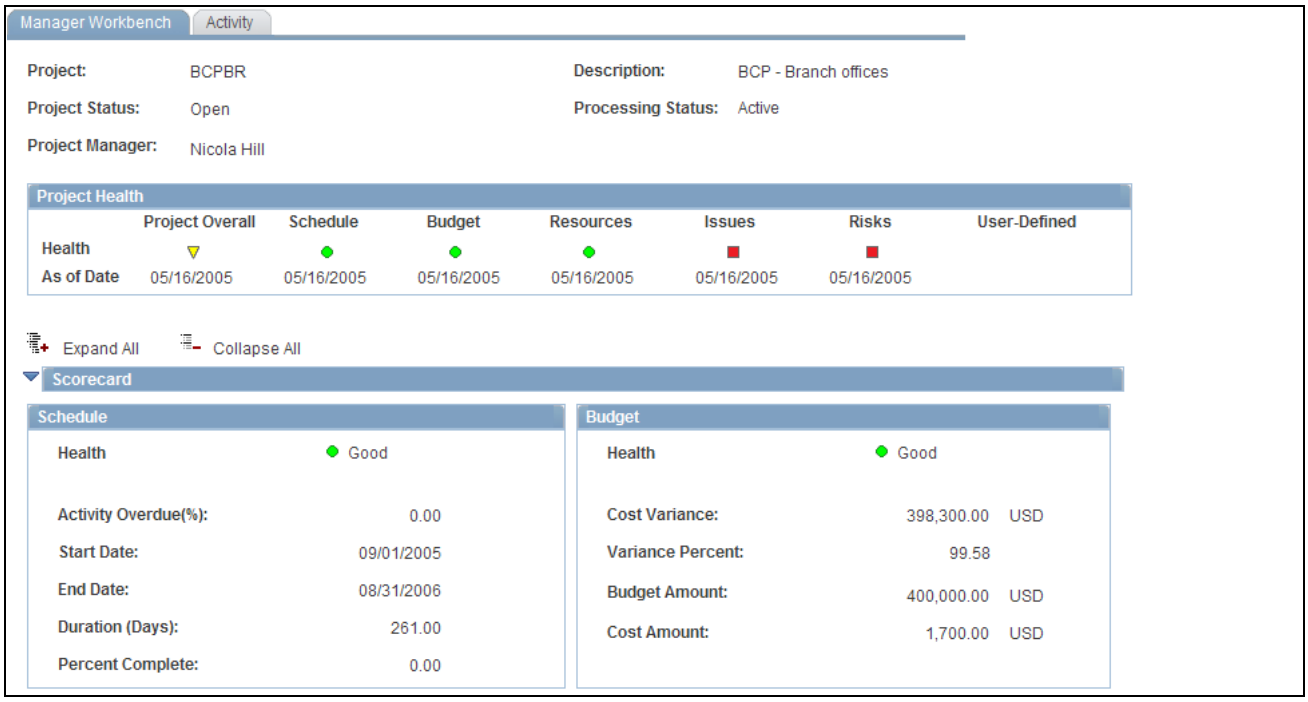

Manager Workbench page (1 of 5)

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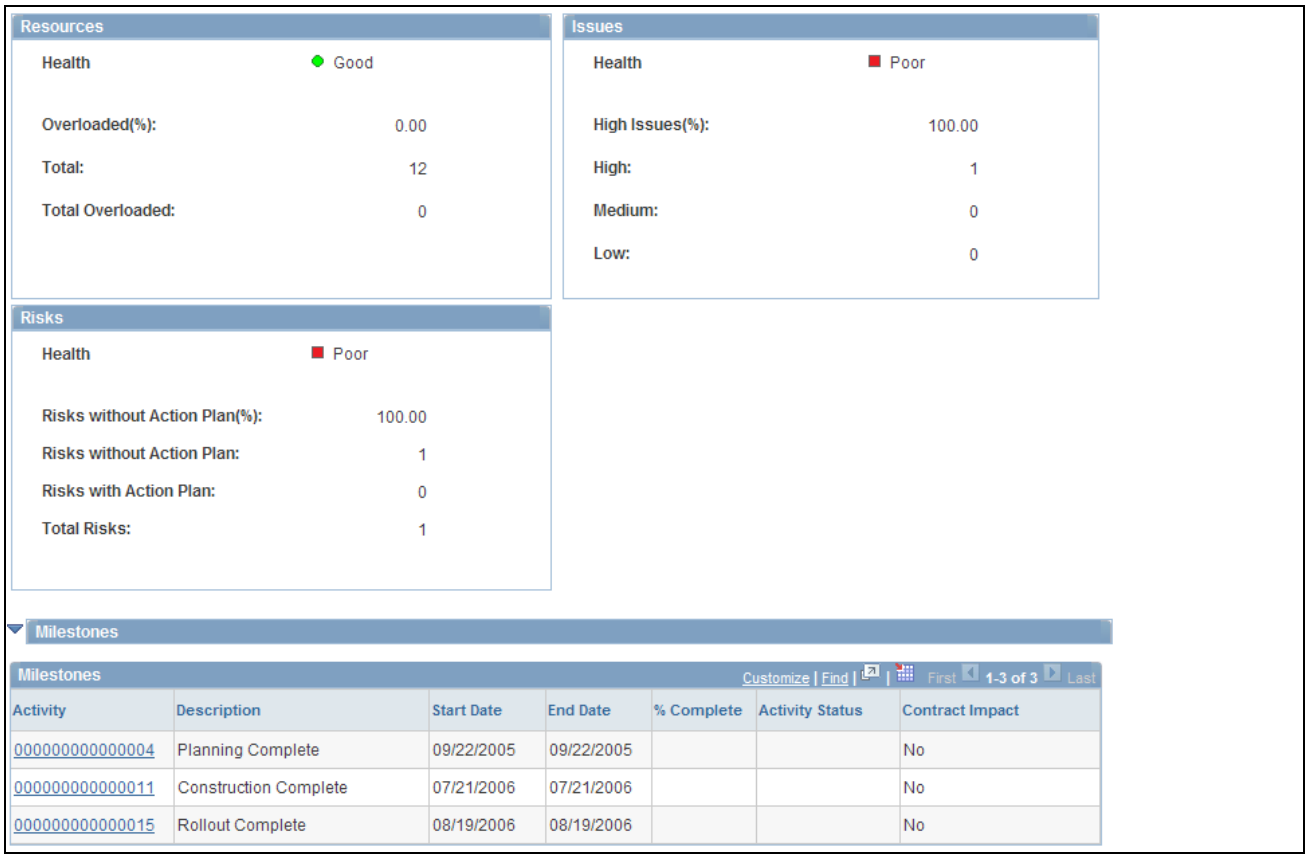

Manager Workbench page (2 of 5)

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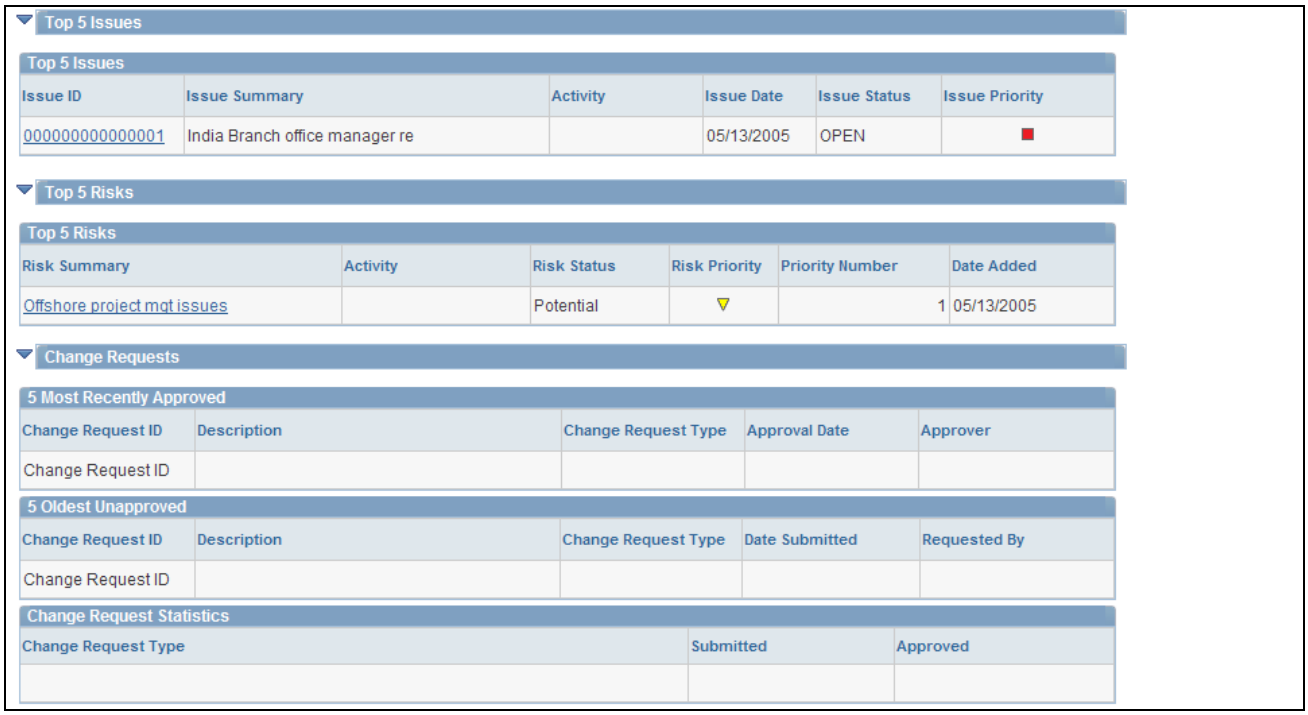

Manager Workbench page (3 of 5)

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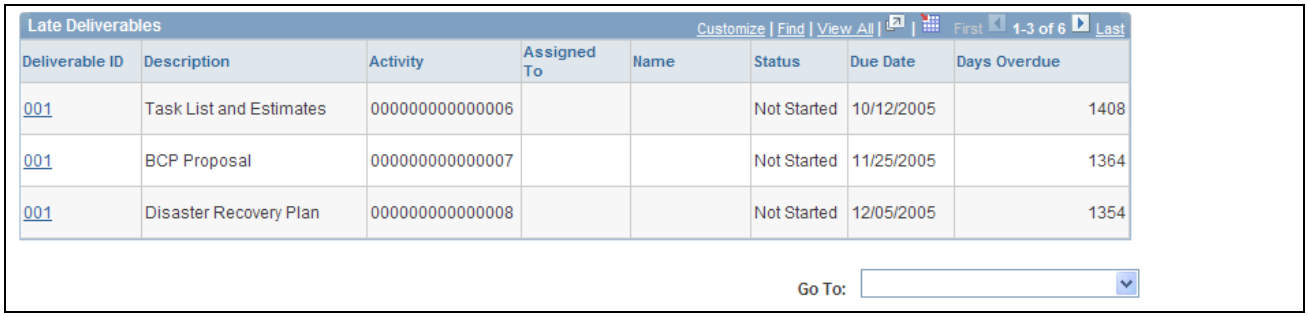
Manager Workbench page (4 of 5)



Manager Workbench page (5 of 5)

This page provides a summary of project 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.

Project Health

Project Overall Displays the visual indicator to identify the overall project health that is either manually entered on the project definition or calculated by the system as the weighted average of the health indicators of scorecard components.

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Schedule, Budget, Resources, Issues, and**Risks** Displays the visual indicator to identify the project attribute health that is either manually entered on the project definition or calculated by the system based on the health criteria that is established on the Program Management Options page. If no health criteria are established for the business unit in which this project resides, the health fields do not appear.

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22.

User Defined Displays the visual indicator to determine good, fair, or poor health that you specify on the project definition.

As of Date Displays the date that the project attribute health was last updated.

Expand All Click to expand all of the sections on the page.

Collapse All Click to collapse all of the sections on the page.

Scorecard - Schedule

This scorecard displays detailed information regarding project schedule health. The system calculates these values using the Program Refresh Application Engine process (PGM_PROGRFSH) and stores the data in the Project Health table (PC_PROJHEALTH).

Activity Overdue(%) (Activity Overdue Percent) Displays the percentage of overdue activities, which is calculated as *((Number of Overdue Activities) ÷ (Total Activities)* × 100.

Duration The project duration, in days.

Percent Complete The percentage of the project that is complete.

Scorecard - Budget

This scorecard displays detailed information regarding the budget for this project. The system calculates these values using the Program Refresh Application Engine process (PGM_PROGRFSH) and stores the data in the Project Health table (PC_PROJHEALTH). The system calculates budget health based on the budget alert criteria entered on the Budget Alerts page.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Budgeting Project Costs and Revenue," Defining Budget Alert Thresholds.

Cost Variance Displays the difference between the budget amount and cost amount, which is calculated as *(Budget Cost) – (Actual Cost)* .

Variance Percent Displays the variance percentage for the project calculated, which is calculated as *((Budget Cost) − (Actual Cost)) ÷ (Budget Cost))* × 100.

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Budget Amount Displays the budget amount, which is calculated as the sum of all project transactions for the selected project, where the analysis type is in the project's budget analysis group (AN_GRP_ACTV_BUD).

Cost Amount Displays the cost amount, which is calculated as the sum of all project transactions for the selected project, where the analysis type is in the project's cost analysis group (AN_GRP_TOT_COSTS).

Scorecard - Resources

This scorecard displays detailed information regarding project resources. The system calculates these values using the Program Refresh Application Engine process (PGM_PROGRFSH) and stores the data in the Project Health table (PC_PROJHEALTH).

Overloaded(%) (overloaded percentage) Displays the percentage of resources that have overbooked schedules, which is calculated as *((Number of Overloaded Resources) ÷ (Total Resources)* × 100.

Total Displays the number of resources that have been assigned to this project.

Total Overloaded Displays the number of resources that are assigned to this project and are overbooked.

Scorecard - Issues

This scorecard displays detailed information regarding project issues. The system calculates these values using the Program Refresh Application Engine process (PGM_PROGRFSH) and stores the data in the Project Health table (PC_PROJHEALTH).

High Issues(%) (high issues percentage) Displays the percentage of issues that are high priority, which is calculated as *((Number of High Priority Issues) ÷ (Total Number of Issues)* × 100.

Scorecard - Risks

This scorecard displays detailed information regarding project risks. The system calculates these values using the Program Refresh Application Engine process (PGM_PROGRFSH) and stores the data in the Project Health table (PC_PROJHEALTH).

Risks without Action Plan(%) (risks without action plan percentage) Displays the percent of risks that do not have an associated action plan, which is calculated as *((Number of Risks without an Action Plan) ÷ (Total Number of Risks)* × 100.

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Milestones

Project milestones are key events in a project that have special significance. A milestone can be the completion of a major deliverable or the realization of an important approval. You define milestones in the Project Activity - Definition page. Use this section to view summary information for the activities that have been defined as milestones for this project.

Activity Displays the activity ID of the milestone activity as a link to the activity definition. Click the activity ID link to transfer to the Project Activity component, where you can view and update the activity definition.

Contract Impact Indicates whether this milestone is associated with any contract lines. Values include: *Yes* or *No.* When the project milestone is referenced in any PeopleSoft Contract billing plan, revenue plan, or contract milestone, *Yes* appears in this field. Click the *Yes* link to access the Impacted Contract Details page in PeopleSoft Contracts.

Top 5 Issues

Use this section to view the top five unresolved issues sorted by priority—highest to lowest, and age—oldest to newest.

Issue ID Displays the issue ID as a link to the Issue page, where you can view or update issue data.

Issue Priority Displays a color visual indicator to indicate the issue priority.

High Displays this symbol to indicate that this is a *high* priority issue.

Medium Displays this symbol to indicate that this is a *medium* priority issue.

Low The system displays this symbol to indicate that this is a *low* priority issue.

Top 5 Risks

Use this section to view the top five risks sorted first by risk status, risk priority—highest to lowest, then priority number—lowest to highest. This data is specified on the Project Risk page.

Risk Summary Displays the risk summary as a link to the Project Risk page, where you can view or update risk information.

Activity Displays the activity ID of the activity for which this risk is defined. The system displays the activity ID only if this is an activity risk.

Risk Status Displays the status of the risk. The system only displays *Active* and *Potential* risks.

Risk Priority Displays a color visual indicator to indicate the risk priority.

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High	Displays his symbol to indicate that this is a *high* priority risk.
Medium	Displays this symbol to indicate that this is a *medium* priority risk.
Low	Displays this symbol to indicate that this is a *low* priority risk.
Priority Number	Displays the priority number that is defined on the Project Risk page.

Change Requests - 5 Most Recently Approved

Use this section to view a list of the five most recently approved project change requests. Click the *Change Request ID* link to transfer to the Change Request page.

Change Requests - 5 Oldest Unapproved

Use this section to view a list of the five oldest unapproved project change requests. Click on the *Change Request ID* link to transfer to the Change Request page.

Change Requests - Change Request Statistics

Use this section to view the number of approved and submitted change requests that have been entered for this project. The change requests are sorted by change request type.

Project Exceptions - Late Activities

Use this section to view a list of detail activities that are incomplete after the activity end date. Click the *Activity ID* link to transfer to the Activity Definitions - General Information page, where you can view and modify the activity schedule.

Project Exceptions - Unassigned Activities

Use this section to view a list of detail activities for which there are no assigned resources. Click the *Activity ID* link to transfer to the Project - Resources page, where you can view and edit the activity definition.

Project Exceptions - Upcoming Activities

Use this section to view a list of detail activities that are scheduled to begin within the next week. Click the *Activity ID* link to transfer to the Activity Definitions - General Information page, where you can view and edit the activity definition.

Project Exceptions - Overloaded Resources

Use this section to view a list of overloaded resources, as determined by the Calculate Warning Indicator Application Engine (PGM_SCH_EDIT). Click the *Activity ID* link to transfer to the Resources by Activity page, where you can view and edit resources that are assigned to an activity.

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Project Exceptions - Activity/Assignment Conflicts

Use this section to view a list of resources that have activity assignments beyond their assignment schedule in PeopleSoft Resource Management.

Click the *Activity ID* link to transfer to the Activity Definitions - General Information page, where you can view and edit the activity definition.

Click the Assignment Details icon to transfer to the Resource Detail page (PC_PRL_SCHED), where you can review the assignment details. This section appears only if PeopleSoft Resource Management is installed.

Project Exceptions - Late Deliverables

Use this section to view a list of incomplete deliverables that are past their due date. Click the *Deliverable ID* link to transfer to the Deliverable Detail page, where you can view and update deliverable data.

Go To

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

Change Control Analysis	Select to access the Change Control Analysis page to view a history of modifications for this project.
Deliverables	Select to access the Deliverables Summary component to view or update any of the project's activity's deliverables.
Earned Value Projection	Select to access the Earned Value Projection page where you can view earned value history and future projection for the project in an S-Curve chart.
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 or update any of the project's activities.
Project Activities	Select to access the Project Activities component to view a Gantt Chart of the project schedule.
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.
Project Request	Select to access the Project Request component to view the project request that is associated with this project.
Project Transactions	Select to access the Transaction List page for the project's activities.

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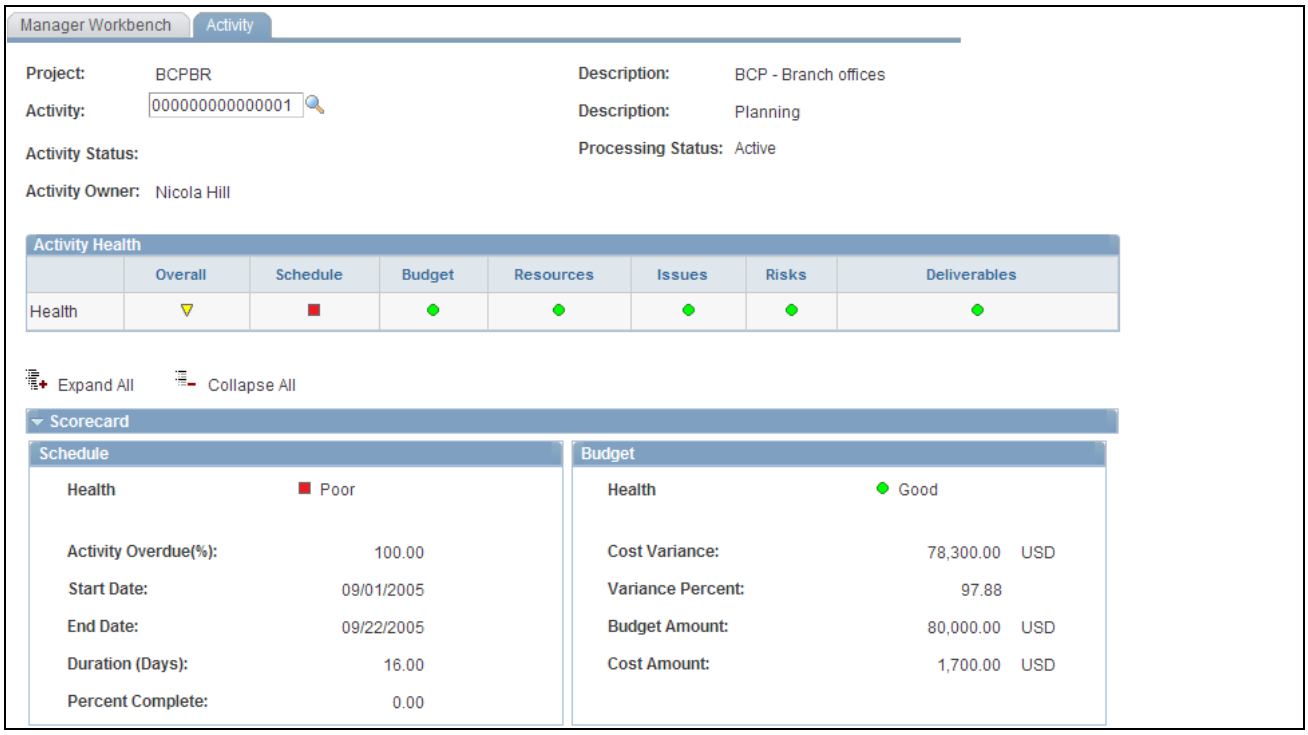
Project Valuation	Select to access the Project Valuation page for the project.
Status Reports	Select to access the Review Status Reports page, where you can review project team members' status reports and mark them *Complete*.

Reviewing Activity Health Using the Manager Workbench

Access the Manager Workbench - Activity page (Program Management, Project Management, Manager Workbench, Activity tab).



Manager Workbench - Activity page (1 of 2)

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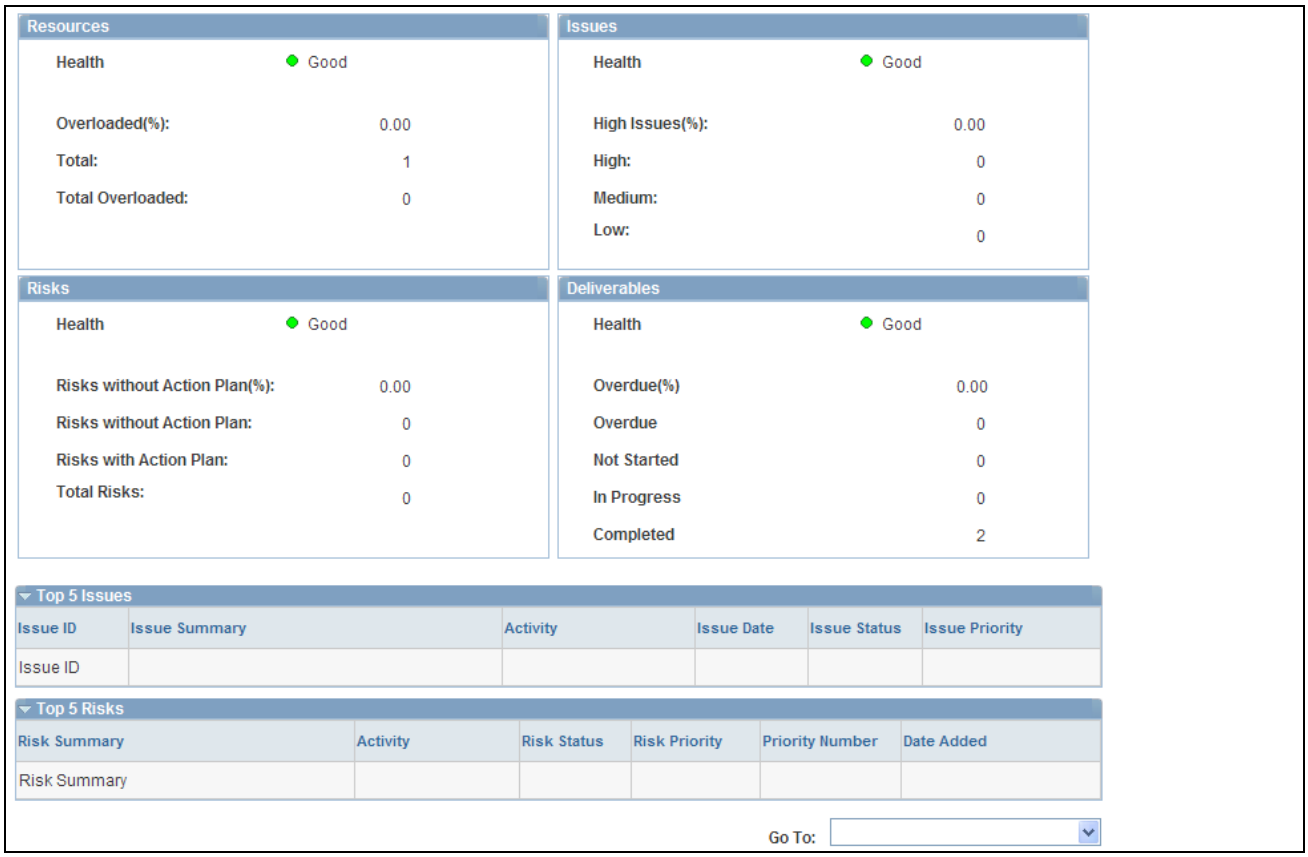

Manager Workbench - Activity page (2 of 2)

This page provides a summary of activity data from various components in PeopleSoft Program Management and PeopleSoft Project Costing. Use the Activity field to specify the activity for the data you want to display. You can specify a summary or detail activity. For a summary activity, the system sums or averages its detail activities for all calculations. For example, the budget cost of a summary activity is the sum of the budget costs of all child activities and the summary activity schedule health is an average of the activity schedule health values.

Activity Select the activity ID for which to display the workbench information. You can select from any summary or detail activity within the project.

Activity Status Displays the current activity status that is defined on the Status page for activities.

Processing Status Displays the current processing status that is defined on the Activity Definitions - General Information page.

Activity Owner Displays the current activity owner that is defined on the Activity Definitions - General Information page.

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Activity Health

Overall Displays the visual indicator to identify the overall activity health that the system calculates using the weighted average of the health indicators of scorecard components. The weight percent values are specified on the Program Management Options page

See Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Defining Business Unit Options, page 22.

Schedule, Budget, Resources, Issues, Risks, and**Deliverables** Displays a colored visual indicator to identify the activity attribute health that is calculated by the system.

Expand All Click to expand all of the sections on the page.

Collapse All Click to collapse all of the sections on the page.

Scorecard - Schedule

This scorecard displays detailed information regarding the schedule for this activity. The system calculates these values in real time each time you access this page.

Health Displays a color visual indicator to identify the activity schedule health based on the alert and warning percentages that are specified on the Program Management Options page.

Activity Overdue(%) (activity overdue percentage) Displays the percentage of overdue activities, which is calculated as *((Number of Overdue Activities)* ÷ *(Total Activities)* × 100.

Duration The activity duration, in days. For summary activities, the system displays *0.*

Percent Complete The percentage of the activity that is complete.

Scorecard - Budget

This scorecard displays detailed information regarding the budget for this activity. The system calculates these values in real time each time you access this page.

Health Displays a color visual indicator to identify the activity budget health based on the budget alert criteria on the activity Budget Alert page. If there is no budget alert set up for this activity or this is not a cost activity, the system displays good health.

Cost Variance Displays the difference between the budget amount and cost amount, which is calculated as *(Budget Cost)* – *(Actual Cost)* . If this is not a cost activity, then the systems displays *0.*

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Variance Percent	Displays the variance percentage, which is calculated as *((Budget Amount) − (Cost Amount)) ÷ (Budget Amount))* × 100. If this is not a cost activity, then the systems displays *0*.
Budget Amount	Displays the budget amount, which is calculated as the sum of all transactions for the selected activity. If this is not a cost activity, then the systems displays *0*.
Cost Amount	Displays the cost amount, which is calculated as the sum of all transactions for the selected activity. If this is not a cost activity, then the systems displays *0*.

Scorecard - Resources

This scorecard displays detailed information regarding activity resource health. The system calculates these values in real time each time you access this page.

Overloaded(%)(overloaded percentage)	Displays the percentage of resources that have overbooked schedules on this activity, which is calculated as *((Number of Overloaded Resources) ÷ (Total Resources)* × 100.
Total	Displays the number of resources that have been assigned to this activity.
Total Overloaded	Displays the number of resources that have been assigned to this activity and are overbooked.

Scorecard - Issues

This scorecard displays detailed information regarding issues for this activity. The system calculates these values in real time each time you access this page.

High Issues(%) (high issues percentage)	Displays the percent of issues for this activity that are high priority calculated as *((Number of High Priority Issues) ÷ (Total Number of Issues)* × 100.

Scorecard - Risks

This scorecard displays detailed information regarding activity risks. The system calculates these values in real time each time you access this page.

Risks without Action Plan(%) (risks without action plan percentage)	Displays the percent of risks for this activity that do not have an associated action plan, which is calculated as *((Number of Risks without an Action Plan) ÷ (TotalNumber of Risks)* × 100.

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Scorecard - Deliverables

This scorecard displays detailed information regarding deliverables for this activity. The system calculates these values in real time each time you access this page.

Overdue(%) (overdue percentage) Displays the percentage of deliverables for this activity that are overdue, which is calculated as *((Number of Overdue Deliverables) ÷ (Total Number of Deliverables)* × 100.

Top 5 Issues

Use this section to view the top five unresolved issues sorted by priority—highest to lowest, and age—oldest to newest, for this activity.

Top 5 Risks

Use this section to view the top five risks sorted first by risk status, risk priority—highest to lowest, then priority number—lowest to highest, for this activity. This data is specified on the Project Risk page.

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 the activity budget by comparing the amount of work that is performed against the amount that is budgeted for that quantity of work. For example, if half of the work that is required by an activity is completed, only half of the activity's budget should be used.

Pages Used to View Earned Value

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

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Page Name	Definition Name	Navigation	Usage
Earned Value Projection	PC_EARNED_VAL_PRJN	• Program Management, Interactive Reports, Earned Value Projection, Earned Value Projection • Program Management, Interactive Reports, Earned Value Click the View Earned Value Projection icon. • Program Management, Project Management, Manager Workbench Select Go To: Earned Value Projection • Program Management, Project Management, Manager Workbench, Activity Select Go To: Earned Value Projection • Program Management, My Projects Click the View Earned Value Projection icon.	View earned value history and future projection for projects or activities in an S-Curve chart.
Percent Complete History	PC_PRCNT_COMP_HIST	• Program Management, Interactive Reports, Percent Complete History, Percent Complete History • Program Management, Interactive Reports, Earned Value Projection Click the View Percent Complete History link.	View a chart of the percent complete progression over time for projects and activities.

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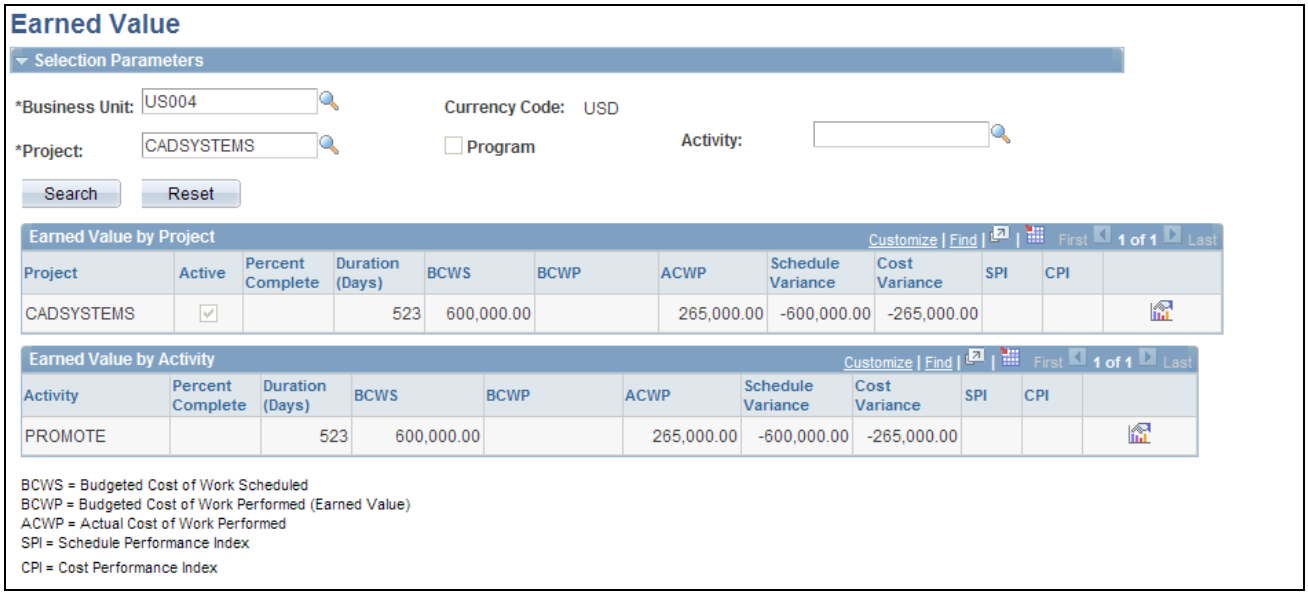
Page Name	Definition Name	Navigation	Usage
Actual and Forecast Chart	PC_ACT_FCAST_CHART	• Program Management, Interactive Reports, Actuals and Forecast, Actual and Forecast Chart • Program Management, Interactive Reports, Earned Value Projection Click the View Actuals and Forecast Chart link.	View a bar chart of the actual cost of work performed values and the forecast values for projects and activities.

Viewing Earned Value

Access the Earned Value page (Program Management, Interactive Reports, Earned Value).



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 that is within the project.

If a program is entered in the Project field, the page displays earned value data for all projects that are 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 it is defined on the enterprise program tree.

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Percent Complete	Displays the percentage complete value that the system calculates based on the method that is selected on the Project Costing Definition page.
Duration (Days)	Displays the number of days that are allotted for the completion of the project or activity.
BCWS (budgeted cost of work scheduled)	Displays the budget amount that is 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)	Displays the budgeted cost based on the percentage of the project or activity that is completed and the corresponding duration date. For example, if the project is 50 percent complete, this field summarizes and displays all budget rows in the Project Transactions summary table (PC_SUMMARY_TBL) that have an accounting date that occurs on or before the halfway date of the project's duration. This is also known as the earned value.
ACWP (actual cost of work performed)	Displays the actual cost of the project or activity as of the current date.
Schedule Variance	Displays the 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	Displays the difference between how much it should cost to achieve the current level of completion for the activity and how much it actually costs to a achieve the level of completion as of the current date. Cost variance is calculated as *(Budgeted Cost of Work Performed) − (Actual Cost of Work Performed)* .
SPI (schedule performance index)	Displays the ratio of the work that is performed to the work that is scheduled, which is calculated as *(Budgeted Cost of Work Performed) ÷ (Budgeted Cost of Work Scheduled)* .
CPI (cost performance index)	Displays the ratio of the budgeted cost of work that is performed to actual cost, which is calculated as *(Budgeted Cost of Work Performed) ÷ (Actual Cost of Work Performed)* .
	Click to access the Earned Value Projection page where you can view earned value history and future projection. If you click the icon on an activity row, the system draws the chart for that activity. If you click the icon on a project row, the system draws the chart for that project.

Viewing Earned Value Projection

Access the Earned Value Projection page (Program Management, Interactive Reports, Earned Value Projection, Earned Value Projection).

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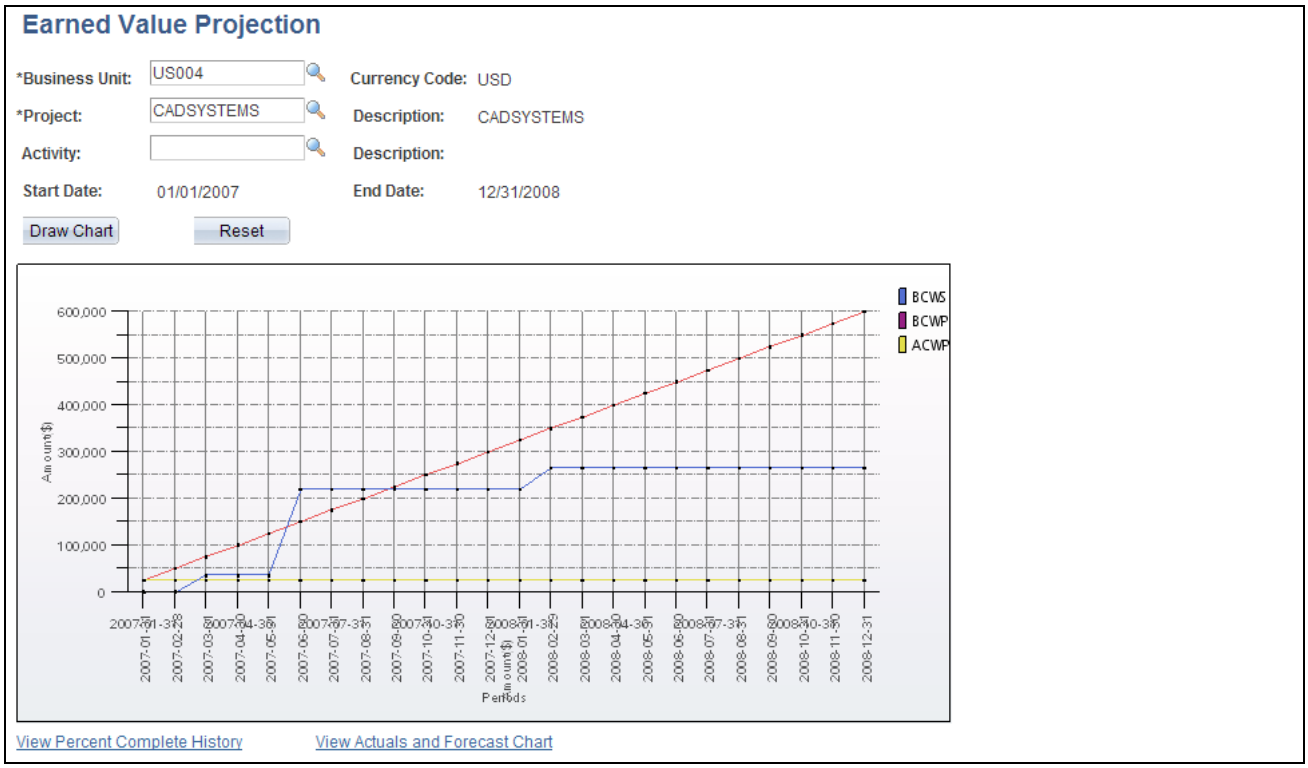
Note. Because earned value reporting is a comparison of the performance of a project against its budget, if a project does not have an active budget, earned value cannot be determined. The system can draw the earned value projection chart only for projects with active budgets.



Earned Value Projection page

Business Unit — Enter the business unit that contains the project or activity for which you want to draw the chart.

Project — Enter the project ID for which you want to draw a chart. If you want to draw a chart for a project, you should leave the Activity field blank.

Activity — Enter the activity for which you want to draw a chart. If you leave this field blank, the system draws a chart at the project level.

Currency Code — Displays the currency code in which the amounts are displayed. This is the project business unit currency code.

Start Date and **End Date** — Displays the start date and end date of either the project or the activity depending on whether the chart is being drawn for a project or for an activity.

Draw Chart — Click to render the chart based on the parameters that you entered for Business Unit, Project, and Activity.

Reset — Click to reset the chart to the original chart from when you entered this page.

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Periods	Displays the periods that are based on the active project cost budget calendar. Each plot point represents the ending date of each budget period. The last plot point is based on the budget period end date of the greatest accounting date of actuals, cost estimates to complete, and budget for the project. If the project does not have an active budget, then the system cannot determine earned value and an error message appears.
BCWS (budgeted cost of work scheduled)	Represents the budgeted cost of work scheduled. This is the finalized budget. The system uses the Cost Budget analysis group defined for the project and sums all amounts with accounting dates less than or equal to each plot point date.
BCWP (budgeted cost of work performed)	Represents the budget cost of work performed. The system charts the BCWP values based on these rules: • BCWP is zero until the project or activity starts. If the percent complete is zero, then BCWP is zero. • For plot points less than or equal to current date: For each plot point the system determines the effective percent complete for the project or activity and calculates the budget date for the plot point based on the schedule percent complete. It uses the Cost Budget analysis group defined for the project and sums all amounts with an accounting date less than or equal to the calculated budget date. • For plot points in the future: Since percent complete is not available for the future, the system uses the schedule performance index (SPI) to project BCWP amounts in the future. For each plot point, the system multiplies the BCWS by the current SPI.
ACWP (actual cost of work performed)	Represents the actual cost of work performed. The system charts the ACWP values based on these rules: • For plot points prior to the current date: The system uses the Actual Cost analysis group defined for the project and sums all of the amounts with the accounting date that is less than or equal to each plot point date. • For plot points that occur after the current date: The system uses the Forecast analysis group that is defined for the project and sums all of the amounts with accounting dates less than or equal to each plot point date.
View Percent Complete History	Click to access the Percent Complete History page where you can view the percent complete progression for this project or activity.
View Actuals and Forecast Chart	Click to access the Actual and Forecast Chart page where you can view actuals and forecast over time for this project or activity.

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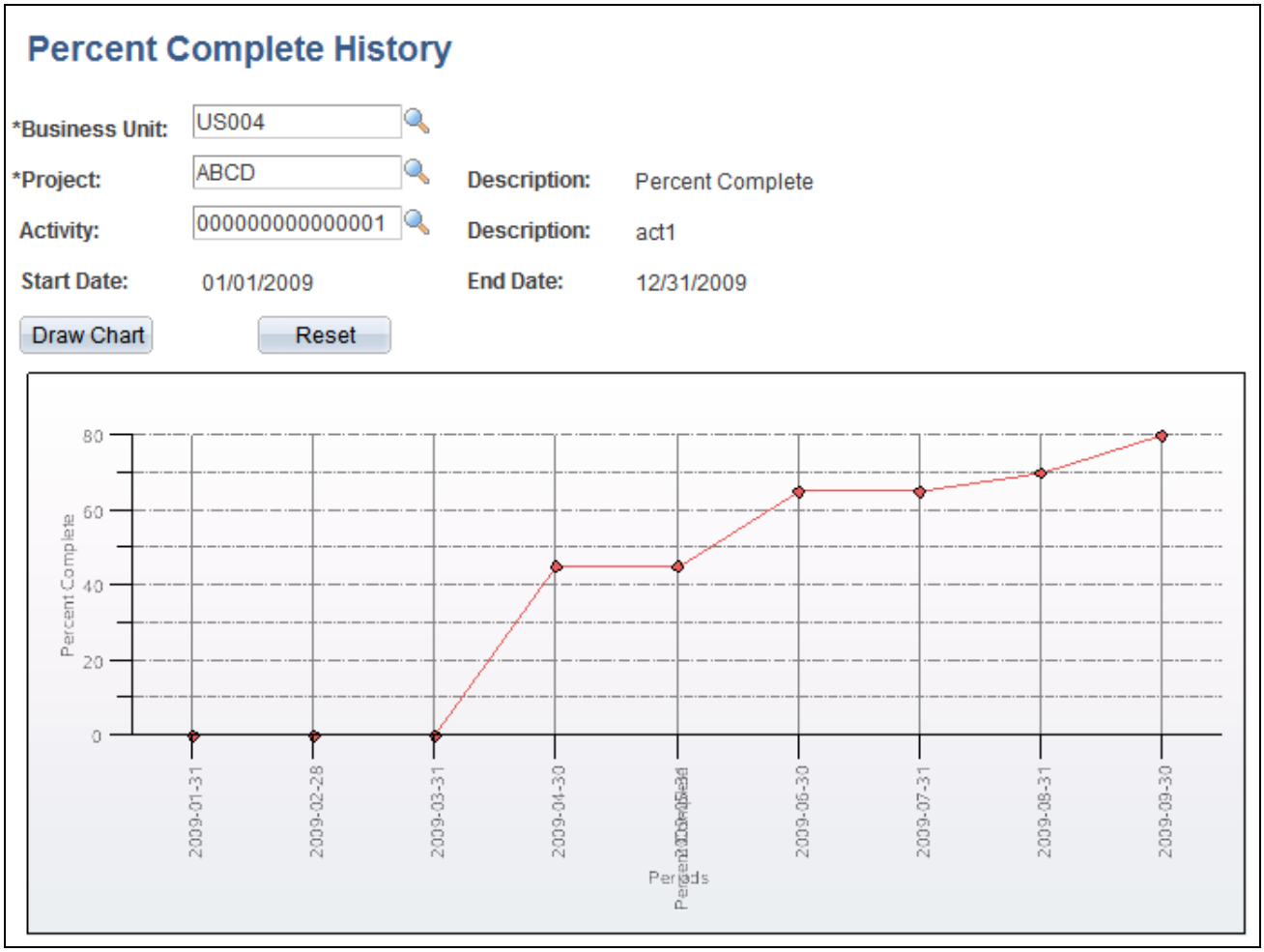
Viewing Percent Complete History

Access the Percent Complete History page (Program Management, Interactive Reports, Percent Complete History, Percent Complete History).



Percent Complete History page

If you access this page by clicking on the View Percent Complete History link from the Earned Value Projection page, the system opens this page in a new window and displays the chart with the criteria that you entered on the Earned Value Projection page. If you access this page from menu navigation, you can enter the search criteria and click the Draw Chart button to generate the chart.

The system draws the chart from the project or activity start date to the current date. The x-axis is based on the project's active budget calendar. If the project has no active budget, then the installation level default budget calendar will be used. The plot points are the budget period end dates. The y-axis is the percent complete.

Viewing Actuals and Forecasts

Access the Actual and Forecast Chart page (Program Management, Interactive Reports, Actuals and Forecast, Actual and Forecast Chart).

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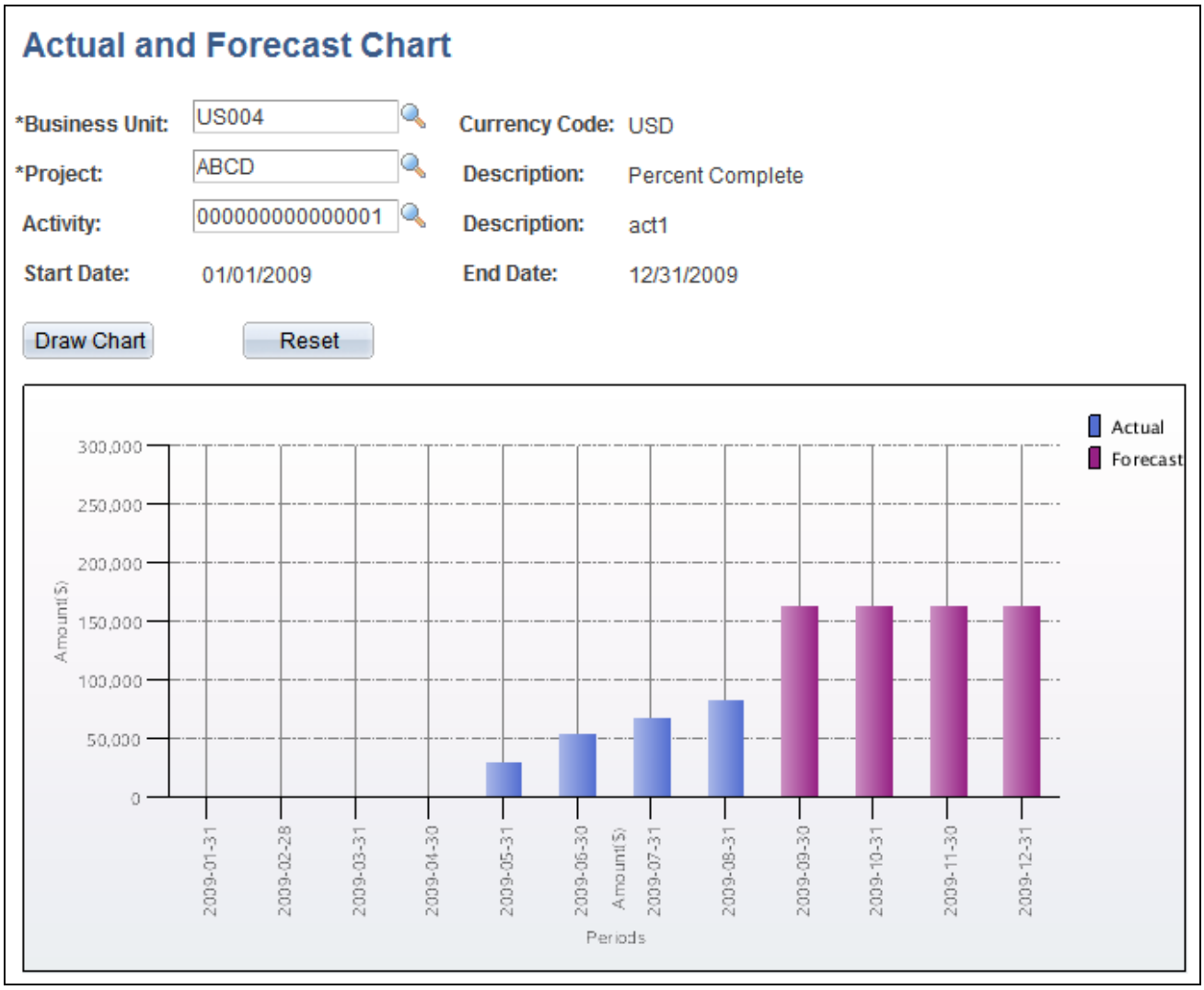

Actual and Forecast Chart page

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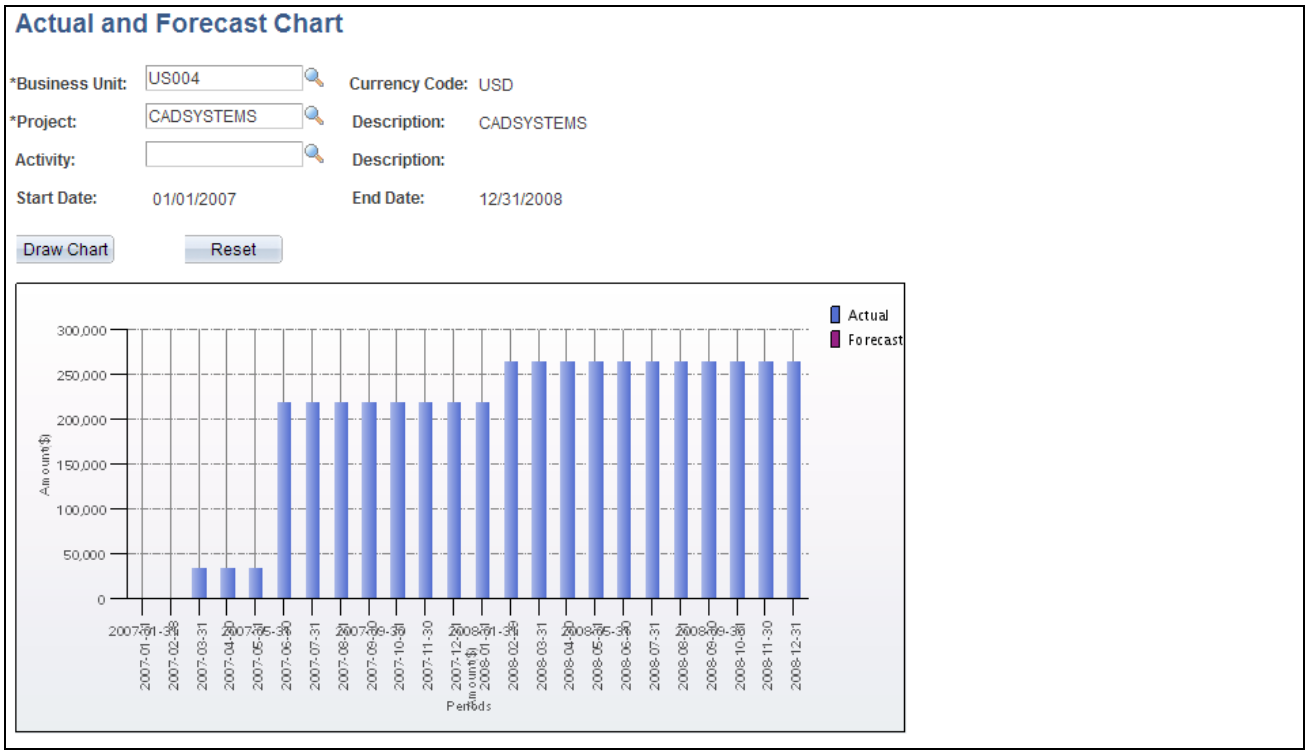

Actual and Forecast Chart page

This page displays a bar chart of the ACWP for each period. If you access this page by clicking on the View Actuals and Forecast Chart link from the Earned Value Projection page, the system opens this page in a new window and displays the chart with the criteria that you entered on the Earned Value Projection page. If you access this page from menu navigation, you can enter the search criteria and click the Draw Chart button to generate the chart.

Viewing and Loading Estimate to Complete Transactions

This section provides and overview of the Load Estimate to Complete Application Engine process (PGM_ETC_LOAD) and discusses how to:

- Set up estimate to complete analysis types.
- Load estimate to complete transactions.
- View estimate to complete transactions.

Understanding the Load Estimate to Complete Application Engine

The Load Estimate to Complete Application Engine process (PGM_ETC_LOAD) creates estimate to complete rows in the Project Transaction table (PROJ_RESOURCE). The system uses the estimate to complete data for earned value reporting and project valuation reporting.

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To calculate the estimate to complete values, the Load Estimate to Complete process multiplies the remaining work by the cost rate and then spreads it evenly across the remaining periods of the activity. The process uses the calendar that is associated with the active cost budget plan for the project. If no active cost budget plan exists, the process uses the default budget calendar from the Project Costing Installation Options page. The date range that the process uses is from the current date to the end date of the activity. If the end date of the activity has passed and work still remains for that activity, the process loads the entire estimate to complete amount into the current period and performs no spreading.

An activity can have multiple estimate to complete rows if more than one currency code is used on the activity resource list. The process summarizes the rows by activity and currency code and then calls the Transaction Loader Application Engine process (PC_INTFEDIT) to load the rows into the Project Transaction table.

You must manually initiate or schedule the Load Estimate To Complete process as often as you require time reports to be submitted. For example, if you require weekly time reports, you should approve time reports weekly, and run the process after you approve the time reports. This process cannot be initiated automatically because users may adjust the remaining work amount after the Expenses to Project Costing Application Engine process (PC_EX_TO_PC) loads time data from PeopleSoft Expenses. After you run the Load Estimate To Complete process for a business unit, and optionally for a project, the estimate to complete rows remain in the Project Transaction table until you run the Load Estimate To Complete process again for that business unit and project.

See Also

PeopleSoft Project Costing 9.1 PeopleBook, "Integrating with Third-Party Applications," Loading Transaction Data

PeopleSoft Project Costing 9.1 PeopleBook, "Pricing Project Costs," Understanding Pricing Project Costs

Pages Used to View and Load Estimate to Complete Transactions

Page Name	*Definition Name*	*Navigation*	*Usage*
Installation Options - Project Costing Integration	INSTALLATION_PCINT	Setup Financials/Supply Chain, Install, Installation Options, Project Costing Integration	Select the analysis types for transactions.
Load Estimate to Complete	RUN_PGM_ETC_LOAD	Program Management, Program Tools, Load Estimate To Complete, Load Estimate to Complete	Run the Load Estimate to Complete application engine to load the estimate to complete transactions into the Project Transactions table.
Project Valuation	PC_PRJ_ANALYTICS	Project Costing, Interactive Reports, Project Valuation	View the estimate to complete transactions at the project and activity level using the valuation template of your choice.

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Setting up Estimate to Complete Analysis Types

Access the Installation Options - Project Costing Integration page (Setup Financials/Supply Chain, Install, Installation Options, Project Costing Integration).

Use this page to define the Cost Estimate to Complete and Bill Estimate to Complete analysis types. Users enter the analysis types that the system assigns to rows that are created when activity remaining work is multiplied by the activity cost rate and activity bill rate. PeopleSoft Program Management delivers these analysis types for this purpose:

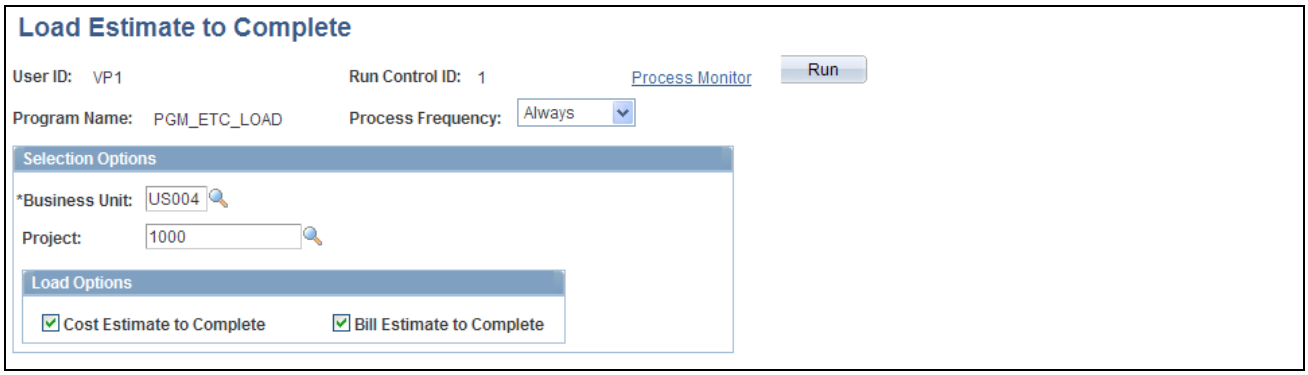
- *ETC:* Cost estimate to complete.
- *ETB:* Bill estimate to complete.

These analysis types are default values and can be changed by users.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up PeopleSoft Project Costing Control Data," Understanding Transaction-Related Control Data.

Loading Estimate to Complete Transactions

Access the Load Estimate to Complete page (Program Management, Program Tools, Load Estimate To Complete, Load Estimate to Complete).



Load Estimate to Complete page

Business Unit Enter the business unit for which to calculate the estimated remaining cost or billing amounts.

Project Enter the project ID to run this process for only one project. You can only choose from active projects.

Cost Estimate to Complete Select to enable the process to reload the rows with the analysis type of *ETC* in the Project Transaction table.

Bill Estimate to Complete Select to enable the process to reload the rows with the analysis type of *ETB* in the Project Transaction table.

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Viewing Estimate to Complete Transactions

Access the Project Valuation page (Project Costing, Interactive Reports, Project Valuation).

After estimate to complete transactions are loaded into the Project Transaction table, you can view them on the Project Valuation page using the appropriate valuation template that has been set up by the system administrator. The cost estimate to complete transactions appear as transactions with the analysis type that is specified on the Installation Options - Project Costing Integration. The default analysis type setting for cost estimate to complete is ETC and the default for bill estimate to complete is ETB.

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Analyzing Projects," Setting Up and Using Project Valuation.

Viewing Forecast to Complete Variance

This section discusses how to:

- View forecast to complete variance.
- View the forecast to complete variance chart.

Note. The forecasts mentioned on this page refer to only Services Forecasting forecasts, not to the Estimate at Completion forecasts.

Pages Used to View Forecast to Complete Variance

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

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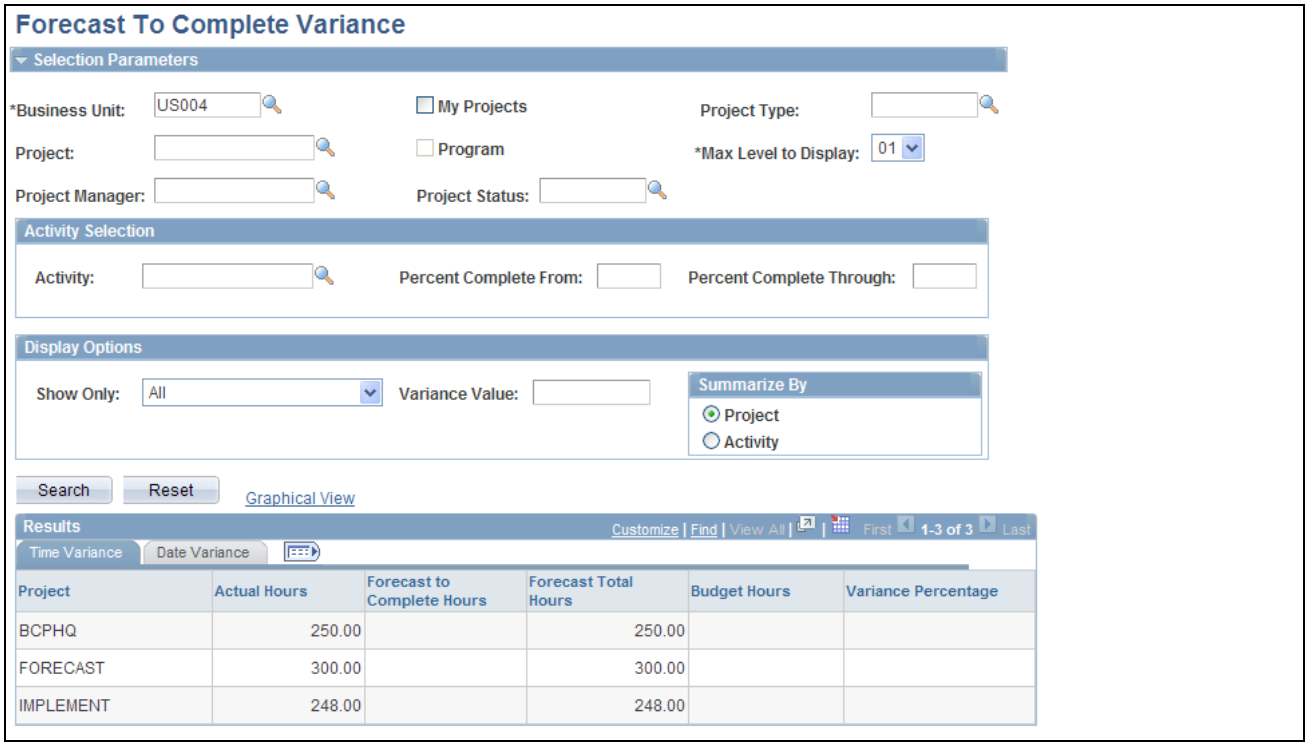
Viewing Forecast to Complete Variance

Access the Forecast to Complete Variance page (Program Management, Interactive Reports, Forecast to Complete, Forecast to Complete Variance).

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



Forecast to Complete Variance page

Enter the necessary search criteria to filter the projects that require forecast 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 that is 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** — 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 to provide further search criteria.

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Display Options

These options customize how variance data appears.

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 use for comparison purposes.

Summarize By Select whether variance data displays by *Project* or by *Activity.*

Time Variance and Date Variance

Activity Displays the activity ID. This column is displayed only if *Activity* is selected in the Summarize By section.

Actual Hours Displays the number of hours that are recorded for the project or activity.

Forecast to Complete Hours Displays the number of forecasted hours to complete the project or activity from the forecasting tables FC_TIME_HDR and FC_TIME_DTL for the forecast horizon that was most recently completed.

Forecast Total Hours Displays the sum of Actual Hours and Forecast to Complete Hours.

Budget Hours Displays the total number of hours that are budgeted for the project or activity.

Variance Percentage Displays the variance percentage, which is calculated as *((Forecast Total Hours) − (Budget Hours)) ÷ (Budget Hours)* × 100

End Date Displays the activity or project 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.

Forecast to Complete Date Displays the completion date estimate from the forecasting table FC_TIME_DTL for the forecast horizon that was most recently completed.

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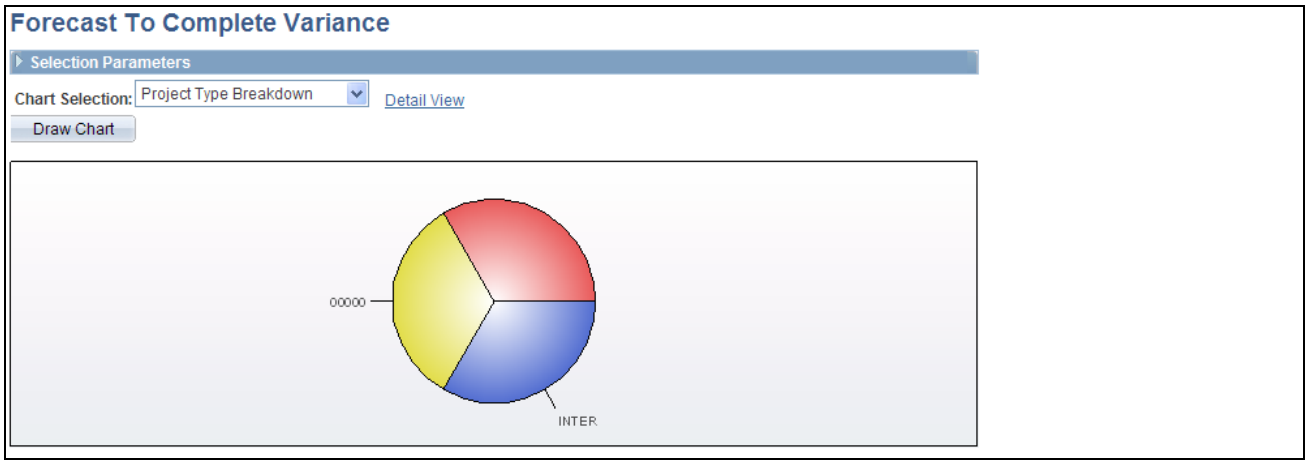
Variance (Days) Displays the difference (in days) between the end date and estimate to complete date. Negative values indicate that completion is ahead of schedule and positive values indicate the number of days that the project is behind schedule.

Viewing Forecast to Complete Variance Chart

Access the Forecast to Complete Variance - Graphical View page (Forecast to Complete Variance - Graphical View).



Forecast 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 a bar chart of budget versus forecast hours percent variance.

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

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

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

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

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Chapter 20

Collecting Resource Forecasts

This chapter provides an overview of forecast time collection, distribution, and review, and discusses how to:

- Create and modify forecasts.
- Protect and submit forecasts.
- Review and approve forecasts.

Note. The forecasts mentioned in this chapter refer to only Services Forecasting forecasts, not to the Estimate at Completion forecasts.

Understanding Forecast Time Collection, Distribution, and Review

This section provides overviews of:

- Forecast time collection.
- Forecast distribution rules and behavior.
- Forecast protection and submission.
- Supervisor and project manager forecast reviews.

Forecast Time Collection

This diagram shows forecast accumulation over time for a resource. In this example, the frequency is semimonthly with four horizon periods in the forecast horizon.

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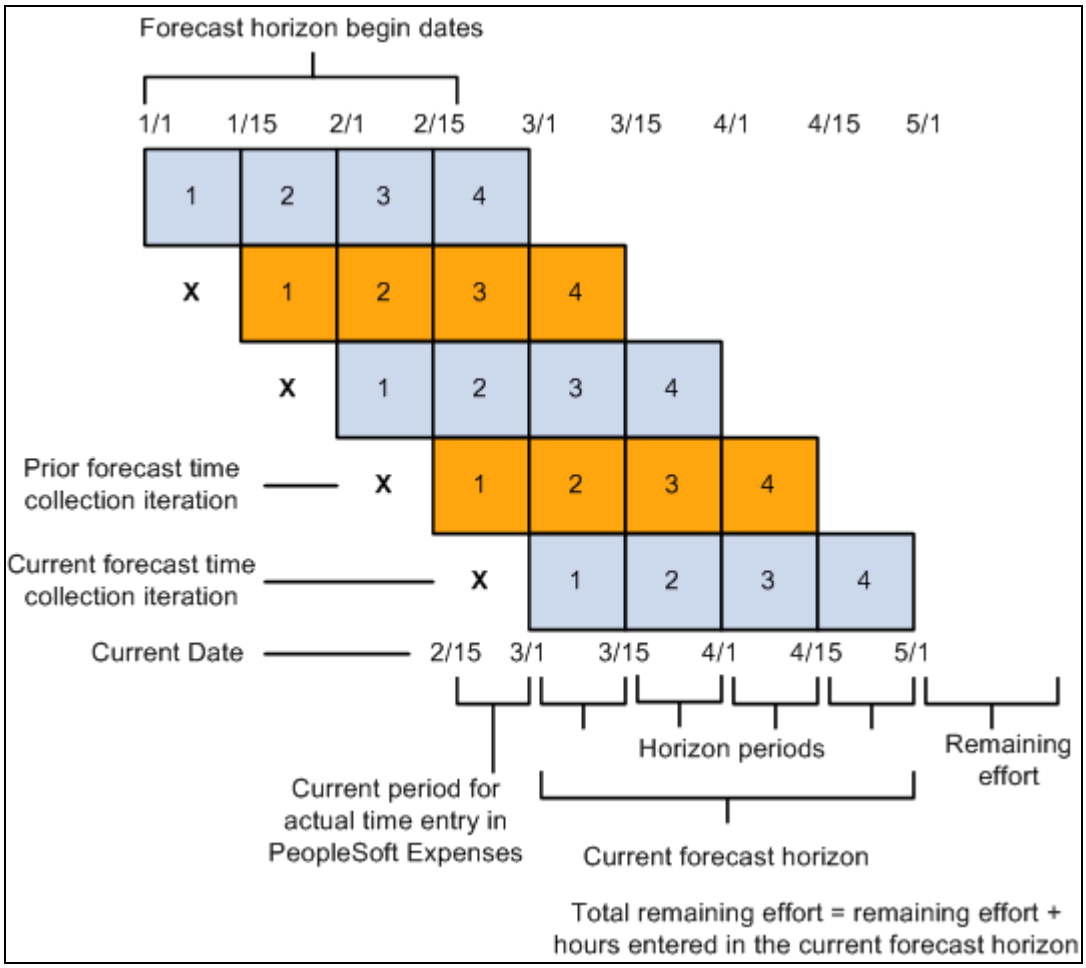

Example of forecast accumulation over time for a resource

Forecast Time Collection Pages

Resources use the forecast time collection pages to enter forecasted work hours. The pages initially display the current forecast, but you can also access prior forecasts. The four main time collection pages are:

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- Forecast Time - Summary page.

  On this page you can:

  - Add or modify projects and activities if schedules are not up-to-date or no prepopulation mechanism is available.
  - Add new projects or activities based on the type of security that is implemented.
  - View projects for which you are a team member (if project team security is active in PeopleSoft Project Costing) and view the associated activities (if activity team security is active in PeopleSoft Project Costing).
  - Enter the total number of forecasted project hours that fall within the forecast horizon and the forecasted project hours that you expect to work during the forecast horizon on projects or activities that are in the project charging level.
  - Access the Forecast Activity Distribution page to distribute prepopulated project hours from PeopleSoft Resource Management across activities that are in the project charging level, if forecasting is required at the activity level.
  - Access the Forecast Horizon by Day page to adjust project or personal hours more precisely for specific days within the forecast horizon.
  - Access the Monthly Schedule page if PeopleSoft Resource Management is installed; on that page, resource managers can update their resources' schedules.
  - If you use PeopleSoft Expenses, access the Time Report - Time Report Summary page in PeopleSoft Expenses for resources to enter project and personal time.
  - Access the Status Report Entry component (PC_SR_ENTRY) and Issue Management Issue Detail component (PC_IM_ISSUE) in PeopleSoft Program Management to report project status and manage project issues.

- Forecast Time - Forecast by Period page.

  This page controls the distribution of hours across periods in the forecast horizon. On this page you can:

  - Enter the forecast for project and personal hours for each horizon period.
  - Access the Forecast Horizon by Day pages to adjust project or personal hours more precisely for specific days within the forecast horizon.

- Forecast Activity Distribution page.

  Activities that are in the project charging level and are associated with the project appear on this page.

  Use this page when the prepopulation engine loads hours to your forecast at the project level from PeopleSoft Resource Management, but the project requires forecasting at the activity level. You can select the activities that you will work on and indicate how to distribute the project hours across activities. Alternatively, if you already know the specific activity, you can enter the information on the Forecast Time - Summary page or the Forecast Time - Forecast by Period page.

- Forecast Horizon by Day (project-based work) page and Forecast Horizon by Day (policy time) page.

  Use these pages to adjust the project or personal hours for each day within the forecast horizon and recalculate total forecast hours.

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See Also

Chapter 4, "Setting Up PeopleSoft Program Management Business Units," Understanding Project Charging Levels, page 17

Forecast Distribution Rules and Behavior

Forecast updates may require the system to distribute hours across multiple days. Forecasting distributes the hours based on some basic configuration assumptions and default rules:

- When you enter forecast hours on the Forecast Time - Summary page, the application populates the forecast by period and daily detail forecast by spreading the horizon hours evenly over the standard workdays within the entire time horizon for the resource.

  Entering forecast hours into horizon periods on the Forecast Time - Forecast by Period page also results in the population of the daily detail forecast. In this case, however, the hours entered in each period distribute to the days within that period so that the distribution of hours can vary from one period to another.

- If an odd number of hours must be spread over a resource's standard work days in a week, the extra hour is placed in the resource's last work day of the date range.

  If dividing a number of forecast hours results in the allocation of less than one hour per day to one or more days in a series, the distribution process rounds up to one hour per day and does not distribute evenly over all days. For example, if there are 8.6 hours to spread over 10 days, the system distributes 1.0 hour to each of the first seven days, and 1.6 hours on the eighth day, leaving the ninth and tenth days empty.

  Note. All hours are stored and appear with two decimal places.

- When distributing project time for a resource's forecast, the application does not double-book the resource on company holidays that are already loaded onto the Personal Time grid.

  Instead, it distributes the hours that are allocated to that period evenly among the remaining days in the calendar week.

- To enter a specific number of hours on the Forecast Activity Distribution page, the algorithm enters the specified number of hours for each workday, skipping company holidays.

  For example, if personal time for company holidays is encountered for the first 3.25 days of a 10-day distribution of seven hours a day, the distribution is 0 hours for the first through fourth day, and seven hours per day for the fifth through tenth days. To double-book the company holiday time, update those specific days by using the Forecast Horizon by Day pages.

- The system automatically double-books all days where personal time (other than a company holiday) is on the Personal Time grid.

  The resource or other authorized individual can correct the forecast as required.

Forecasting distributes the hours to the individual activities based on the following assumptions:

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- For distributing hours, the forecast time collection tool needs to determine how many hours per unit of time a resource is normally expected to work.

  Forecast time collection is based on the assumption that you populate the Standard Hours field (STD_HRS) and Standard Work Period field (STD_HRS_FREQUENCY) on the Job record. The system populates these fields automatically when you use PeopleSoft Human Resources Management (HRMS). If you do not use PeopleSoft HRMS, in addition to entering the required fields on the Personal Data record (PERSONAL_DATA), General Employment Data record (EMPLOYMENT), and Job record, you must also load the Standard Hours field, the Standard Work Period field, and the Frequency Table record (FREQUENCY_TBL). That data is used to determine standard hours. Forecast time collection and utilization interactive reports require these fields and records to convert each resource's standard hours per unit of time to standard hours per week.

- If you are using PeopleSoft Resource Management, the distribution of hours takes into account the resource's standard work days that are defined in the resource profile.

- If you are not using PeopleSoft Resource Management, standard work days are derived from the standard work days that are associated with the resource's GL business unit, and standard hours are derived from the Job record.

- The Forecast Activity Distribution page displays the activities that are in the project charging level for which you are a team member.

  If activity team security is used, you can see only the activities to which you have security access. If activity team security is not used, all that are in the project charging level activities appear.

  See *PeopleSoft Project Costing 9.1 PeopleBook*, "Creating and Maintaining Projects," Defining Projects.

Forecast Protection and Submission

A forecast status is either *Pending* or *Submitted.* A forecast is first created in *Pending* status. Any user with permission to add or update a forecast can protect the forecast in this status and continue to make modifications. A protected forecast is not automatically overwritten by the forecast prepopulation process.

When you submit a forecast, the status changes to *Submitted.* Only the project manager and administrator can approve forecasts and modify forecasts that are in a *Submitted* status. The supervisor and administrator can unsubmit a forecast and modify it until the next forecast collection period begins.

Supervisor and Project Manager Forecast Reviews

After the forecast is submitted, it can be reviewed by the resource, project manager, supervisor, or administrator. The project manager can analyze project information to anticipate projected costs and revenues. Supervisors can analyze utilization to anticipate supply and demand of resources versus new business and projects.

Supervisor Review

The Review Forecasted Time (supervisor review) page is used primarily to ensure that resources are complying with the requirement that they update their forecasts each horizon period. On this page, the supervisor can:

- View forecasts for resources that are direct reports.

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- Unsubmit and modify forecasts until the next forecast collection period begins.
- Modify forecast status.
- Trigger an email reminder indicating to each resource that a forecast is due.

The supervisor is the value in the Supervisor ID field (SUPERVISOR_ID) for the resource in the Job record (JOB) in the HRMS database.

Project Manager Review and Approval

The Review Forecast by Project (project manager review) page is used to ensure that forecasts are accurate before they are used by PeopleSoft Program Management for cost and revenue analysis. On this page, the manager can:

- View forecasts by project.
- View a list of resources who have submitted time toward the project.
- View billing rates, cost rates, and total project costs.
- Approve resource forecasts for the project.

A project team is optional. All forecasts in a *Pending* status are view-only. The project manager cannot edit them until they are submitted by a resource, supervisor, or administrator. After a forecast is submitted, the project manager can edit and approve the forecast.

The project manager is the value in the Project Manager field (PROJECT_MANAGER) for the project in the Project Manager record (PROJECT_MGR) in the Financials database.

Creating and Modifying Forecasts

To create and modify forecasts, use the Forecast Time Capture component (FC_TIME_CAPTURE).

After you prepopulate the forecast and upload forecast time or remaining work from a third-party application, you can view, modify, and finalize the forecast.

This section discusses how to:

- Enter forecast summary information.
- Distribute forecasts across the horizon.
- Distribute forecasts by activity.
- Adjust project forecast hours by day.
- Adjust personal time forecast hours by day.

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Pages Used to Create and Modify Forecasts

Page Name	*Definition Name*	*Navigation*	*Usage*
Forecast Time - Summary	FC_TIME_SUMMARY	Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Summary	Enter forecast summary information. Add or modify projects, activities, and summary level hours to a resource's forecast.
Forecast Time - Forecast by Period	FC_TIME_PERIODS	Select the Forecast by Period tab on the Forecast Time - Summary page.	Distribute the forecast project and personal hours across the horizon periods.
Forecast Activity Distribution	FC_TIME_DTL_DIST	Select Distribute in the Project Time grid on the Forecast Time - Summary page.	Distribute the hours among the activities that are associated with the project.
Forecast Horizon by Day (project time)	FC_TIME_DTL_DLY	• Select Details in the Project Time grid on the Forecast Time - Summary page. • Select Details in the Project Time grid on the Forecast Time - Forecast by Period page.	Adjust the forecasted project hours for each day within the forecast horizon and recalculate the total forecast hours.
Forecast Horizon by Day (personal time)	FC_TIME_POL_DLY	• Select Details in the Personal Time grid on the Forecast Time - Summary page. • Select Details in the Personal Time grid on the Forecast Time - Forecast by Period page.	Adjust the forecasted personal hours for each day within the forecast horizon and recalculate the total forecast hours.

Entering Forecast Summary Information

Access the Forecast Time - Summary page (Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Summary).

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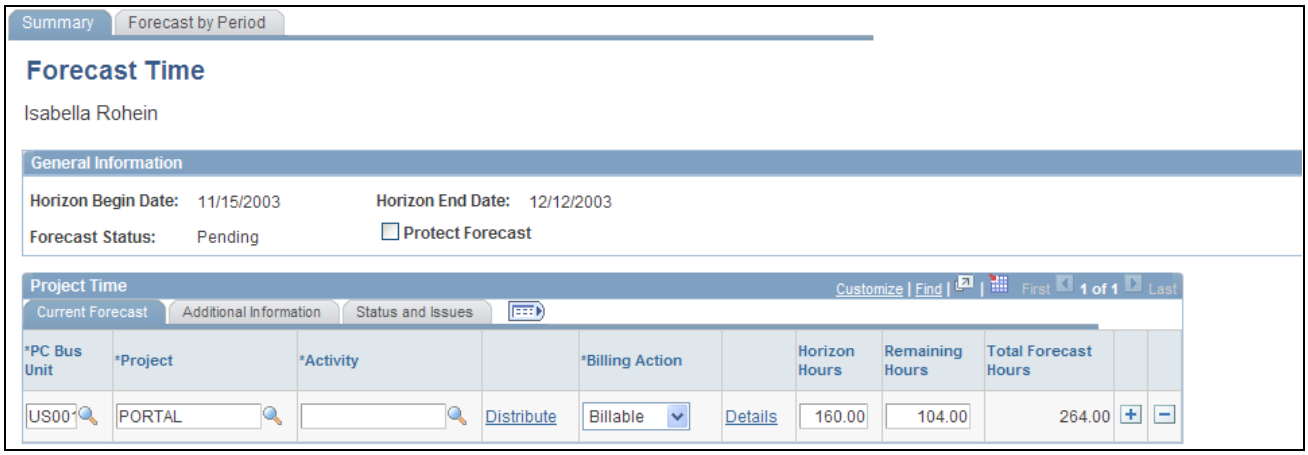
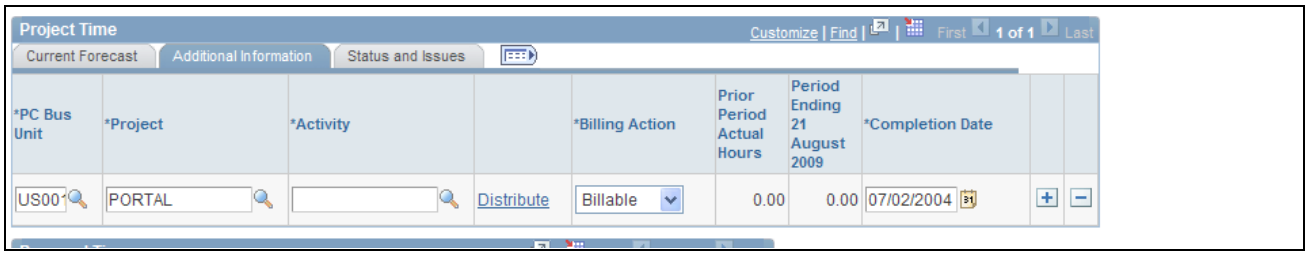
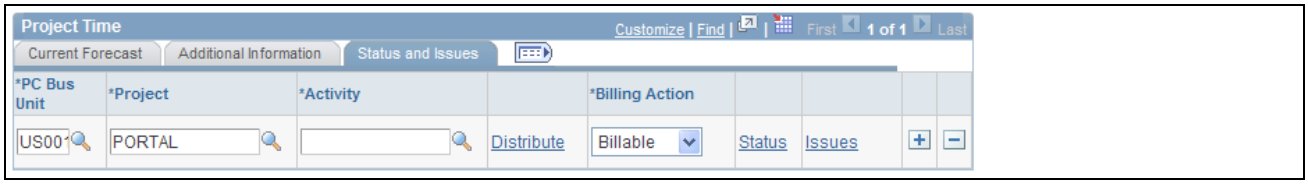


Forecast Time - Summary page with Current Forecast tab selected in the Project Time group box (1 of 4)



Forecast Time - Summary page with Additional Information tab selected in the Project Time group box (2 of 4)



Forecast Time - Summary page with Status and Issues tab selected in the Project Time group box (3 of 4)

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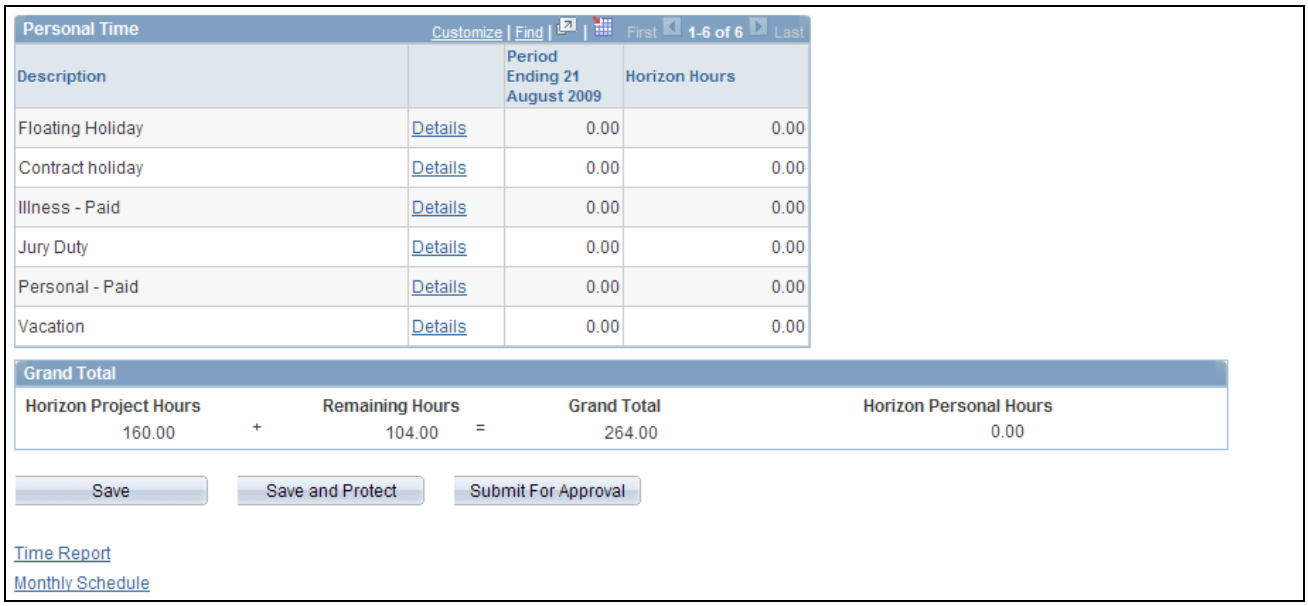

Personal Time group box and Grand Total group box on the Forecast Time - Summary page (4 of 4)

The projects and activities for which you can enter forecast data is based on project team security, and the project charging level. If project team security is used, you can enter forecasts only for the projects to which you have security access. You can enter forecast data only for activities that are in the project charging level.

Data may appear in the forecast from any of these sources:

- The prior forecast.
- PeopleSoft Resource Management resource schedules.
- Third-party project management tools.

If PeopleSoft Expenses is installed, this page contains a link to the resource's time report so that the resource can review and adjust hours and enter the actual time for the current period.

If PeopleSoft Resource Management is installed and the resource exists in PeopleSoft Resource Management, this page contains a link to the Monthly Schedule page, where the resource or resource manager can view and update the resource schedule.

The system automatically spreads the hours evenly across the resource's standard business days, excluding company holidays.

General Information

The Horizon Begin Date, Horizon End Date, (using criteria from the Forecast Configuration page), and Forecast Status fields appear.

Protect Forecast Select to prevent the Populate Time process from overwriting the current forecast. You can deselect the check box (unprotect the forecast) when the forecast status is *Pending*, but you cannot unprotect a forecast if the status is *Submitted* because a submitted forecast is by definition already protected.

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Forecast Summary Project Time

The system displays a row for each project or activity combination for which the employee has forecasted time. Add or delete rows as needed.

PC BU (project business unit) Select the project business unit.

Project Select the project ID.

Activity ID Select the activity within the specified project. This field is active if forecasts are required at the activity level.

Distribute Click to access the Forecast Activity Distribution page, where you can distribute the hours for a project by activity. This link is active if forecasts are required at the activity level.

Billing Action Select *Billable, Internal,* or *Nonbill* (nonbillable) to differentiate these actions in the utilization analysis.

Details Click to access the Forecast Horizon by Day page, where you can adjust daily forecast hours for project time.

Horizon Hours Enter the total hours that you expect to work on the project or activity during the forecast horizon. This number is the total of the detailed hours by day. If you update this number, the detailed hours are evenly distributed.

You must enter a value in this field. If you do not want to forecast any time for this project or activity, delete the row.

Remaining Hours Enter the total hours that you expect to work on the project or activity beyond the forecast horizon.

Total Forecast Hours Displays the sum of the horizon hours and remaining hours.

Select the Additional Information tab to view these additional fields:

Prior Period Actual Hours Displays the total hours that were worked on the project or activity in the prior period. Prior-period actual hours are captured in PeopleSoft Expenses. This field is available only if PeopleSoft Expenses is installed.

Period Ending <date> Displays the actual project or activity hours that were reported in PeopleSoft Expenses in the most recent time report that corresponds to the period ending date shown. This field is available only if PeopleSoft Expenses is installed.

Completion Date Displays the date on which this project or activity is expected to be complete. This date is for reference only; it is not used to spread total hours across horizon periods. If the user enters daily detail records beyond the completion date, the system issues a warning at save and submit time.

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Select the Status and Issues tab to access links to the Status Report Entry component (PC_SR_ENTRY) and Issue Management Issue Detail component (PC_IM_ISSUE) in PeopleSoft Program Management. You can use PeopleSoft Program Management to report project or activity status and manage project issues.

Forecast Summary Personal Time

The Personal Time grid displays a row for each time reporting code (TRC). If PeopleSoft Resource Management is installed and task categories are mapped to TRCs, the Populate Time process prepopulates the periods based on tasks in the resource schedules. If PeopleSoft Resource Management is not installed, or if the resource is not an active resource in PeopleSoft Resource Management, you must manually enter personal time hours.

Description	Displays the personal time reporting categories that were predefined on the Time Reporting Code page in PeopleSoft Expenses.
Details	Click to access the Forecast Horizon by Day page, where you can adjust daily forecast hours for personal time.
<Horizon period date range>	Displays the actual personal time hours that were entered in PeopleSoft Expenses for the date range that is specified in the grid column header.
Horizon Hours	Displays the number of personal hours that occur during the current horizon period. This field is not editable because, unlike project hours, total personal hours should not be evenly distributed over the horizon.

Distributing Forecasts Across the Horizon

Access the Forecast Time - Forecast by Period page (Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Forecast by Period).

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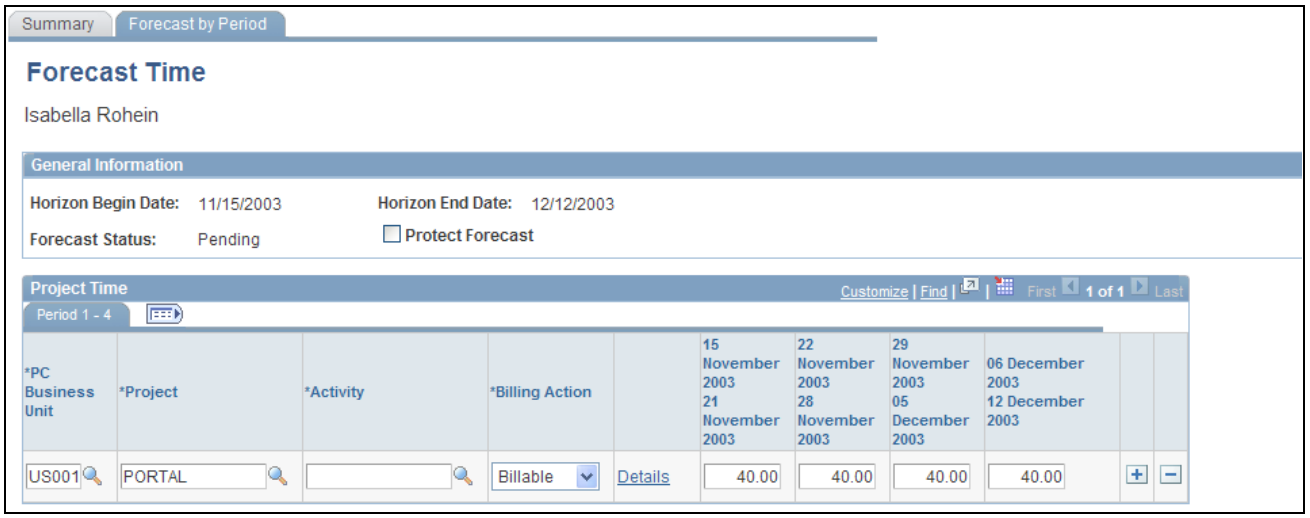
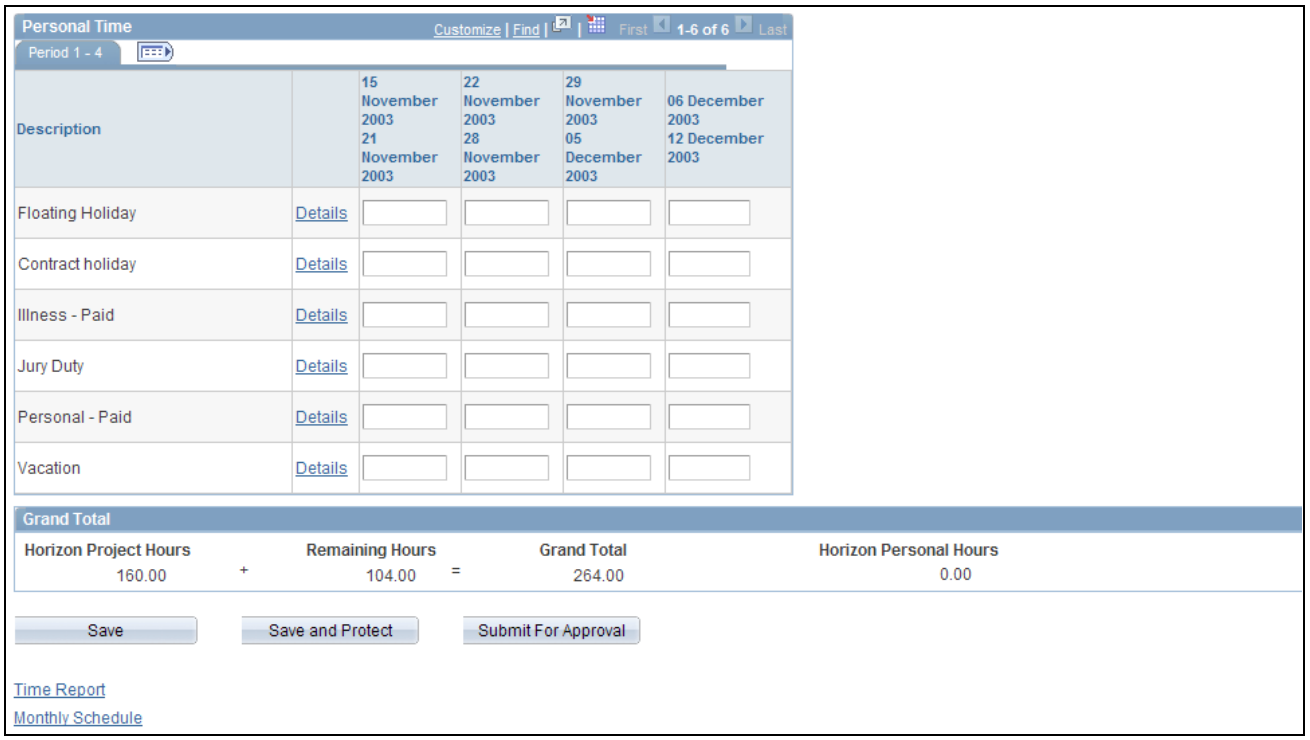


Forecast Time - Forecast by Period page (1 of 2)



Forecast Time - Forecast by Period page (2 of 2)

Use this page to simplify the distribution of hours across periods in the forecast horizon. You can enter the total hours for each horizon period and submit the forecast, or you can click the Details link to adjust hours for specific days on the Forecast Horizon by Day page.

A row appears in the Project Time grid for each project or activity that is in the project charging level. You can enter the project business unit, project, activity, billing action—*Billable*, *Nonbill*, or *Internal*—and the hours for each forecast horizon period.

A row for each predefined TRC appears in the Personal Time grid. You can enter the personal hours for each horizon period in the forecast horizon.

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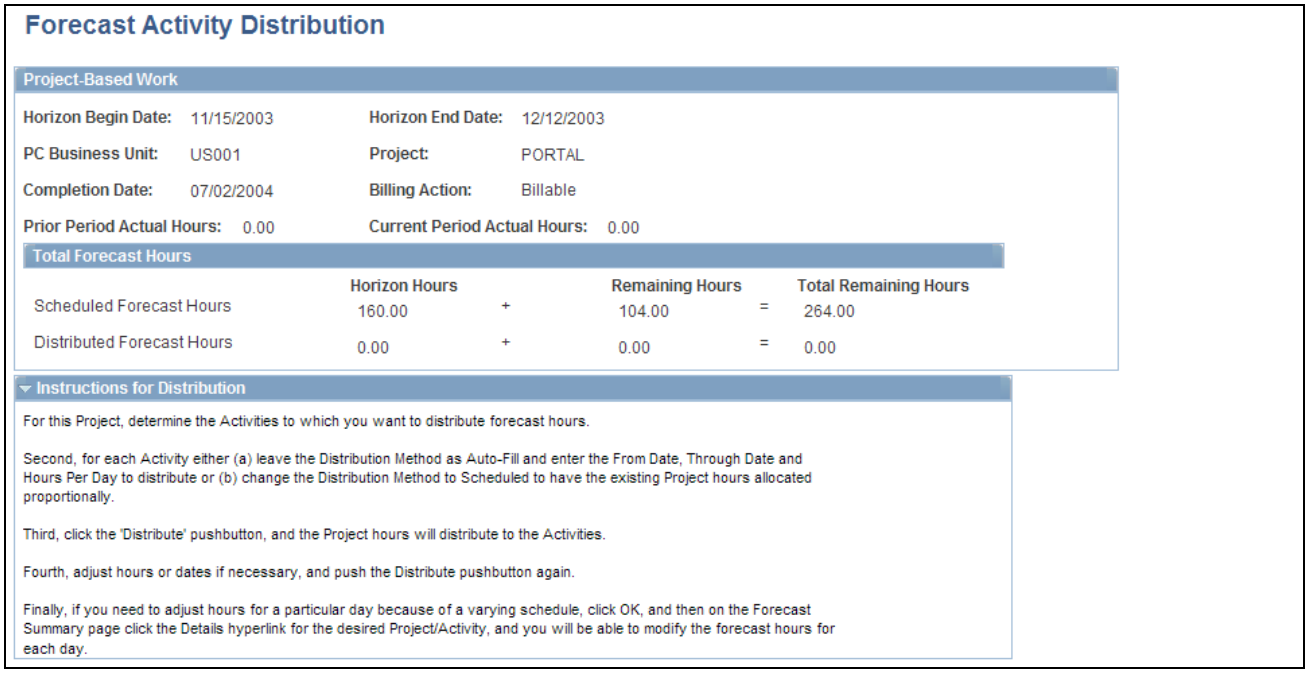
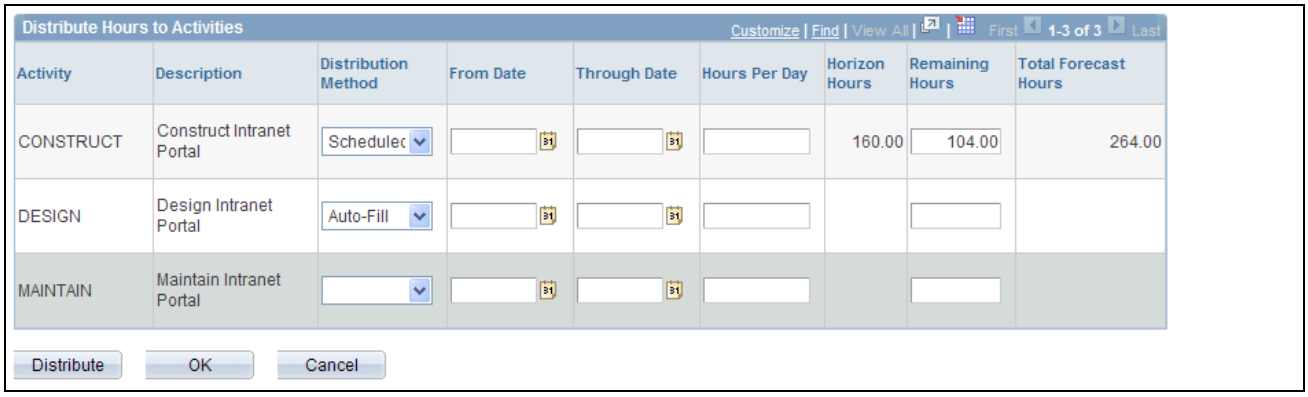
Note. The format of the horizon period date range that appears in these column headers is controlled by a message catalog entry. To change these date formats, update Message Set *138*, Message *1*. This message may be used by other PeopleSoft applications.

Distributing Forecasts by Activity

Access the Forecast Activity Distribution page (select Distribute in the Project Time grid on the Forecast Time - Summary page).



Forecast Activity Distribution page (1 of 2)



Forecast Activity Distribution page (2 of 2)

On this page, you can distribute the project hours to activities that are in the project charging level. You can view the forecasted horizon hours, remaining hours, and total forecast hours for the project.

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Activity and **Description** Displays the name and description of the activity that is associated with the project. If activity team security is used, you can see only the activities to which you have security access. If activity team security is not used, all activities appear.

Distribution Method Available values are:

Auto-Fill: Select to enter the from date, the through date, and the hours per day, to populate the hours by spreading them evenly across the specified days.

Scheduled: Select to enable the system to exclude the from date and through date and to distribute the hours that are already scheduled for specific days proportionally across the activities that you specify.

From Date and **Through Date** Enter the start and end dates for the activity. The system distributes hours evenly across these days if you select *Auto-Fill* as the distribution method.

Hours Per Day Specify the hours per day to distribute to a particular activity if you select *Auto-Fill* as the distribution method.

Note. If you enter start and end dates for an activity, but you do not enter a value in the Hours Per Day field, the rows in the grid for the given date range will clear when you click Distribute. This shortcut can be used to clear multiple rows without using the Delete row <n>icon button for each row.

Horizon Hours Displays the number of distributed forecast hours that fall within the project period.

Remaining Hours Enter the number of hours to distribute to the activity beyond the horizon period.

Total Forecast Hours Displays the sum of the forecast horizon hours and remaining hours for an activity.

Distribute Click to calculate the total hours to allocate to each activity for the forecast horizon after you specify the distribution details for each activity.

The system updates the remaining hours if you enter more hours at the activity level than appeared on the Forecast Time - Summary page for total forecast hours.

You can adjust the hours or dates and click Distribute as many times as needed.

OK Click to calculate the total hours to allocate to each activity for the forecast horizon and return to the Forecast Time - Summary page. A row appears on the Forecast Time - Summary page for each project or activity combination that you selected on the Forecast Activity Distribution page.

Note. To further adjust the activity hours for a specific day, click OK to access the Forecast Time - Summary page, and select Details for the specific activity to access the Forecast Horizon by Day page.

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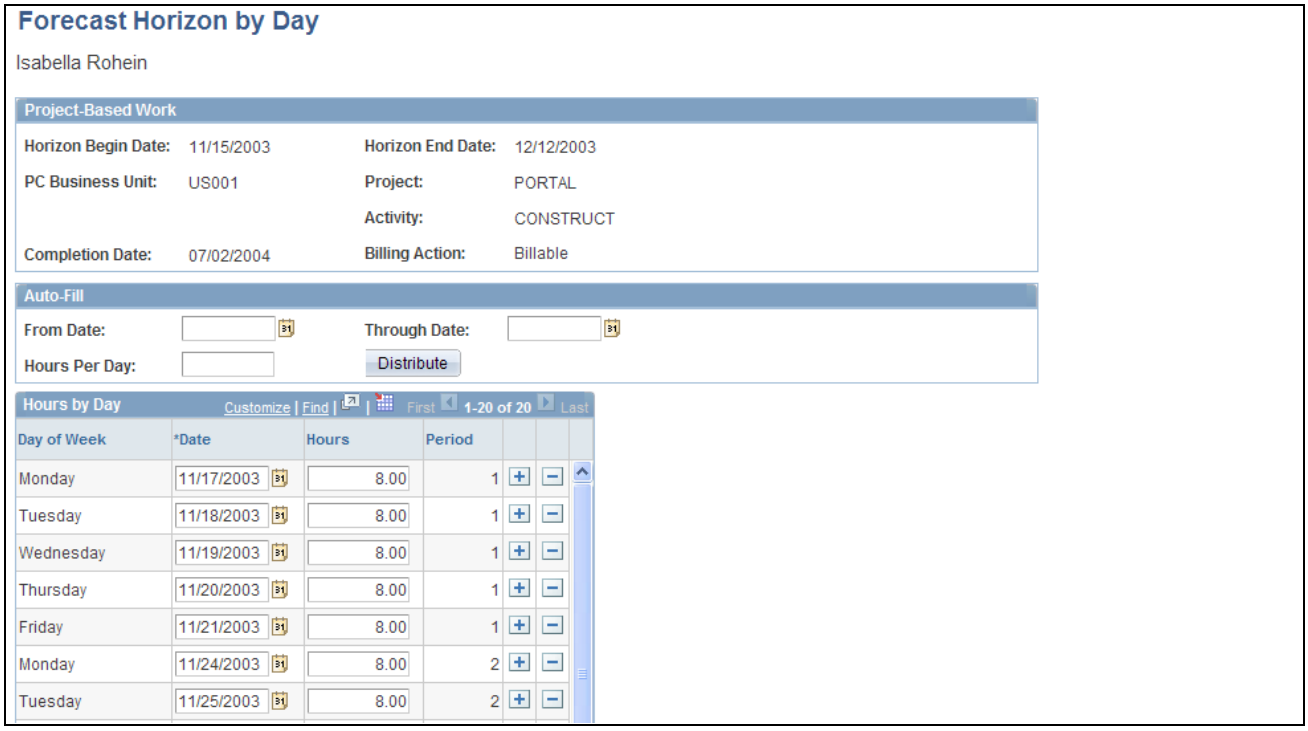
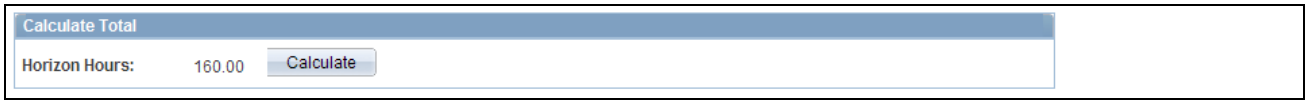
Adjusting Project Forecast Hours by Day

Access the Forecast Horizon by Day page (select Details in the Project Time grid on the Forecast Time - Summary page).



Forecast Horizon by Day (project-based work) page (1 of 2)



Forecast Horizon by Day (project-based work) page (2 of 2)

On this page, you can adjust the hours for each day and recalculate the total horizon hours for the project. If there is no daily data for the forecast horizon, when you submit the forecast, the system automatically distributes the total forecast hours from the Forecast Time - Summary page equally across the days in the forecast horizon, excluding business holidays.

Auto-Fill Enter the date range and hours per day for distributing project hours.

Distribute Click to display the daily hours in the grid.

Calculate Click to calculate the total project hours during the horizon.

You can adjust the daily hours and click Calculate as many times as required to recalculate the total project hours.

OK Click to return to the previous page, where the updated hours appear.

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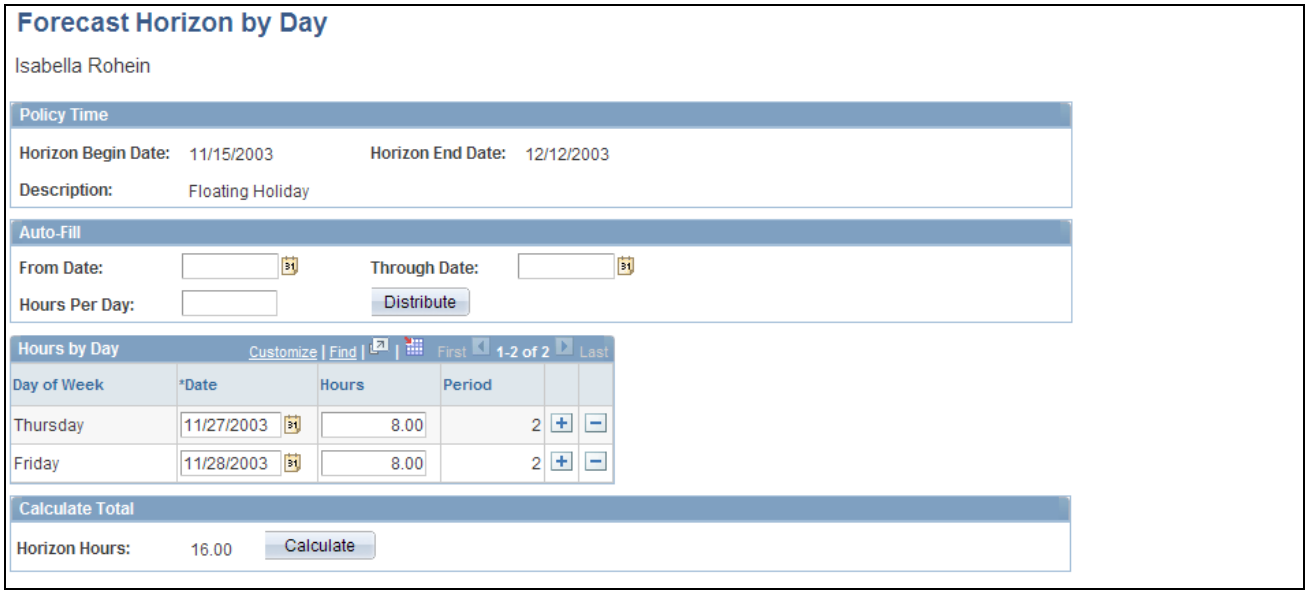
Note. In the Project Manager Review component (FC_REVIEW_PROJ_MGR), the Auto-Fill feature double-books a resource's time for company holidays when this page is used by the project manager. It does *not* double-book for company holidays when the page is used by the resource, supervisor, or administrator acting on behalf of a supervisor.

Adjusting Personal Time Forecast Hours by Day

Access the Forecast Horizon by Day page (select Details in the Personal Time grid on the Forecast Time - Summary page).



Forecast Horizon by Day (policy time) page

On this page, you can adjust the personal hours for all days (where applicable) and recalculate the total personal time during the forecast horizon in the same manner as on the Forecast Horizon by Day page for project-based work.

Protecting and Submitting Forecasts

After you complete the forecast updates, you can save, protect, and submit a forecast for review and approval.

This section discusses how to protect and submit forecasts.

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Pages Used to Protect and Submit Forecasts

Page Name	*Definition Name*	*Navigation*	*Usage*
Forecast Time - Summary	FC_TIME_SUMMARY	Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Summary	Save and protect the forecast and submit it for approval.
Forecast Time - Forecast by Period	FC_TIME_PERIODS	Select the Forecast by Period tab on the Forecast Time - Summary page.	Save and protect the forecast and submit it for approval.
Submit Confirmation	FC_SUBMIT_CONFIRM	• Click Submit For Approval on the Forecast Time - Summary page. • Click Submit For Approval on the Forecast Time - Forecast by Period page.	Confirm the action to submit a forecast for approval.

Protecting Forecasts

Access the Forecast Time - Summary page (Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Summary) or the Forecast Time - Forecast by Period page (Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Forecast by Period).

Select the Protect Forecast check box and click Save, or click Save and Protect at the bottom of the page at any time to ensure that the Populate Time process does not overwrite your work.

When you submit the forecast, you automatically protect it. The system selects the Protect Forecast field, and you cannot clear it unless a supervisor first unsubmits the forecast.

Submitting Forecasts

Access the Forecast Time - Summary page (Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Summary) or the Forecast Time - Forecast by Period page (Employee Self-Service, Employee Project Center, Time, Forecast Time, Forecast Time - Forecast by Period).

Click Submit for Approval and the Submit Confirmation page appears. Click OK to confirm the submission to change the forecast status from *Pending* to *Submitted.*

Only project managers and administrators can modify forecasts that are in a *Submitted* status. Supervisors and administrators can unsubmit a forecast and modify it until the next forecast collection period begins, if they need to modify a forecast's data.

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If the automatic forecast approval option is enabled on the Program Management Options page or specified for the project on the Program Management page, forecast approval by the project manager is not required to make the forecast accessible to PeopleSoft Program Management for cost and revenue analysis. If you did not select the automatic forecast approval option, approval is required on the Review Forecast by Project page before the forecasts can be used for cost and revenue analysis.

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

Reviewing and Approving Forecasts

To review and approve forecasts, use the Supervisor Review component (FC_REVIEW_SUPERVSR) and the Project Manager Review component (FC_REVIEW_PROJ_MGR).

After a resource submits a forecast, the project manager can review, edit, and approve the forecast for use in PeopleSoft Program Management cost and revenue analyses.

This section discusses how to:

- Review forecasts by supervisor.
- Review and approving forecasts by project.
- Perform administrative functions.

Pages Used to Review and Approve Forecasts

Page Name	*Definition Name*	*Navigation*	*Usage*
Review Forecasted Time	FC_REVIEW_SUPERVSR	Manager Self-Service, Review Forecasted Time, Review Forecasted Time	View, modify, and submit the forecast. Send email reminders of forecasts that are due.
Review Forecast by Project	FC_REVIEW_PROJ_MGR	Program Management, Forecasting, Review Forecast by Project, Review Forecast by Project	View all forecasts that are pending or submitted. Edit and approve submitted forecasts.

Reviewing Forecasts by Supervisor

Access the Review Forecasted Time page (Manager Self-Service, Review Forecasted Time, Review Forecasted Time).

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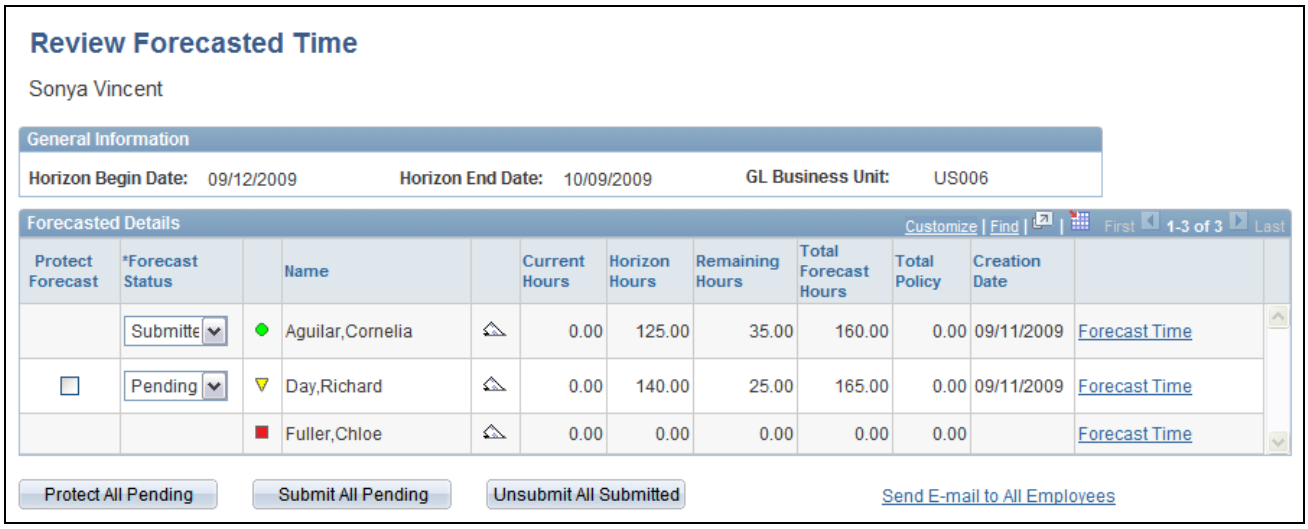

Review Forecasted Time page

The resources that appear on this page report directly to the human resource supervisor who is identified in the Supervisor ID field (SUPERVISOR_ID) on the resource's current row in the Job record (JOB). The supervisor can create, update, protect, submit, and unsubmit a forecast on behalf of a resource.

The grid displays a row for each resource reporting to the supervisor and lists the hours across all projects where the employee is charging time for the period, including current hours, horizon hours, remaining hours, total forecast hours, total policy (forecasted personal time), and creation date (date that the forecast was submitted). The forecast status visual indicator enables you to monitor compliance with the submission process.

Protect Forecast Select the check box in a specific project or activity row to protect the corresponding resource forecast, and save the page.

Forecast Status Select the forecast status. Available values are:

Pending: Select to unsubmit a forecast that currently has a *Submitted* status.

Submitted: Select to submit a forecast.

Indicates that a current forecast has not been created by the resource or by the Populate Time process (FC_HRS_LOAD).

Indicates that a forecast is pending.

Indicates that the forecast is submitted.

Click Send E-mail to send a specific resource a reminder, using the default email application, to submit the forecast.

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Forecast Time Select to access the Forecast Time Capture component (FC_TIME_CAPTURE) in a new browser window to add a forecast for a resource or modify a forecast that has *Pending* status, or the Forecast Time Inquiry component (FC_TIME_INQUIRY) to view details about a submitted forecast.

Note. Save the Review Forecasted Time page before you click Forecast Time to ensure that status changes are reflected in the database.

You must be an authorized user to view data for a resource in the Forecast Capture and Forecast Time Inquiry components.

See *PeopleSoft Expenses 9.1 PeopleBook*, "Securing Your PeopleSoft Expenses System," Setting Up Authorized Users.

Protect All Pending Click to protect all pending forecasts for the resources that appear in the grid.

Submit All Pending Click to submit all pending forecasts for the resources that appear in the grid.

Unsubmit All Submitted Click to change the forecast status to *Pending* for all forecasts that have *Submitted* status in the grid. This enables you to modify the forecasts and submit them again. You can unsubmit a forecast only until the next forecast iteration starts.

Send E-mail to All Employees Select to open the default email application to compose and send email to all resources that appear in the grid.

Reviewing and Approving Forecasts by Project

Access the Review Forecast by Project page (Program Management, Forecasting, Review Forecast by Project, Review Forecast by Project).

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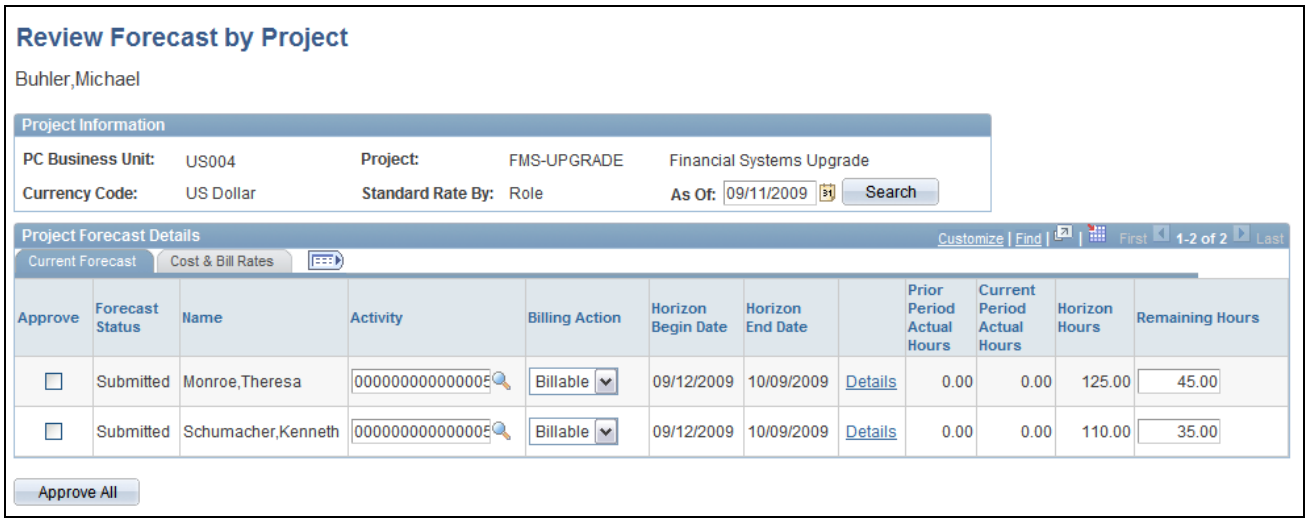

Review Forecast by Project page

Projects appear on this page if the user ID of the person who is logged into the system is identified as the project manager.

On this page, the project manager can view project forecasts in any status, and update or approve forecasts that are in *Submitted* status.

Project Information

General project information is at the top of the page, including the project business unit, project name, currency code, and the standard rate source that is configured for the project business unit on the Program Management Options page or specified for this project on the Defaults tab of the Project General page in PeopleSoft Program Management.

As Of and **Search**

Enter a date occurring in a prior forecast submission period to examine past forecast submissions. Click Search to see details of past forecasts that were made against the project.

Leave the date blank and click *Search* to return the most current forecast submissions.

Current Forecast

The grid displays a row for each resource on the corresponding project team and lists the hours for each project or activity where the resource is charging time for the period.

Approve

Select the check box in a specific project or activity row to approve the corresponding resource forecast when you save the page. The column appears if forecast approval is required by the project manager. The check box appears for submitted projects.

Activity ID

Enter an ID, if needed, to change activities on submitted forecasts.

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Billing Action Select to change the billing action, if needed. Available values are *Billable*, *Internal*, and *Nonbill* (nonbillable). This information is used to determine whether time is treated as utilized for the purposes of utilization analysis.

Details Click to access the Forecast Horizon by Day page and edit a specific resource forecast for a project or activity row. On the Forecast Horizon by Day page, you can modify hours that the resource entered for any day in the forecast horizon.

This link is active for submitted forecasts.

Remaining Hours Enter a value, if necessary, to change the hours that the resource is expected to work on the project or activity beyond the forecast horizon for submitted forecasts.

Approve All Click to approve all of the project or activity forecasts that appear in the grid. This column appears if forecast approval is required by the project manager.

The changes that you make to activity, billing action, detail, and remaining hours are reflected in the resource's forecast when it is viewed in the Forecast Time Inquiry component.

Cost & Bill Rates

The Cost & Bill Rates tab displays estimates of cost and revenue for each resource and project or activity row.

Total Forecast Hours Displays the sum of horizon hours and remaining hours.

Cost Rate and **Billing Rate** Displays the resource's hourly cost and hourly billing rate for the time spent on this activity.

The cost and billing rates are converted to hourly rates if the standard rate is quoted in any unit of measure other than hours, such as days or weeks. The system converts the rates to the project currency that appears in the header of the page.

The source of the standard rates for each resource on the project is defined on the Defaults tab of the Project General page in PeopleSoft Program Management. If no standard rate source is specified for the project, the system uses the default standard rate source that is defined on the Program Management Options page.

Total Cost Displays the product of total forecast hours multiplied by the cost rate.

Bill Total Displays the product of total forecast hours multiplied by the billing rate.

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Performing Administrative Functions

As administrator, you can use the same pages discussed in the previous section to approve, change the status of, and submit all forecasts that you can access. You can also unsubmit a forecast, modify it, and resubmit it until the next forecast collection period starts. You must first be granted security access to these pages through the Authorize Users page in PeopleSoft Expenses.

On the Review Forecasted Time page, you can view each resource's forecasted hours across all projects. On the Review Forecast by Project page, you can view the project hours and update the forecast for each resource on the project team who is charging time for the period.

See Also

Chapter 6, "Setting Up Services Forecasting," Granting Security Access to Forecasts, page 63

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Chapter 21

Analyzing Resource Utilization

This chapter provides an overview of resource utilization interactive reports and discusses how to:

- Define resource utilization parameters.
- Update resource utilization data.
- Launch resource utilization interactive reports.
- Analyze resource utilization interactive reports.

Understanding Resource Utilization Interactive Reports

This section lists prerequisites and discusses:

- Utilization interactive reports from PeopleSoft Analytic Calculation Engine.
- Resource utilization calculations.
- Security and access.

Prerequisites

Before you can generate a resource utilization interactive report with meaningful results, resources or their supervisors must:

- Ensure that resources have values for the Department (DEPTID), Job Code (JOBCODE), Location (LOCATION), Standard Hours (STD_HRS) and Standard Work Period (STD_HRS_FREQUENCY) fields in the Job record (JOB).
- Submit forecasts using the Forecast Time - Summary page or the Review Forecasted Time page in the Employee Self-Service folder and Manager Self-Service folder.
- Submit actual hours worked using the PeopleSoft Expenses self-service pages for time reports.

Note. You must use PeopleSoft Expenses to capture actual time for the Actual to Forecast Utilization interactive report. However, you can capture forecasts for the Forecast Utilization interactive report using PeopleSoft Program Management.

Before you can compare forecast utilization with capacity and actual utilization, administrators must:

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- Configure a PeopleSoft Analytic Calculation Engine server.

  See "Configuring and Starting Analytic Servers" in *PeopleTools PeopleBook: System and Server Administration*

- Run the utilization and capacity engines for the period of time covering the actual time and forecasted time submissions so that utilized hours and capacity hours are calculated and available for use by PeopleSoft Analytic Calculation Engine.

Utilization Interactive Reports from PeopleSoft Analytic Calculation Engine

With the Forecasting feature, you can analyze forecast utilization and actual utilization at a summary business unit or organizational level and drill down to detailed information for individual resources. PeopleSoft Analytic Calculation Engine provides the utilization interactive reports. You do not need a separate database to store data.

PeopleSoft Analytic Calculation Engine reports are dynamic and interactive. You can move data elements on a report and view them using different dimensions. Viewing information from different angles provides in-depth information about the organization, such as how much capacity is available for additional workloads and how well the organization was utilized in the past. You can also evaluate the accuracy of forecasted information by comparing forecasted utilization to actual utilization.

PeopleSoft Analytic Calculation Engine output can be exported to Microsoft Excel or printed. The communication between a PeopleSoft Analytic Calculation Engine interactive report and the database is one-way. The changes that you make on the interactive report do not affect the data in the database.

When you initiate a process request to launch the Forecast Utilization interactive report or the Actual to Forecast Utilization interactive report, the system:

1. Determines the scope of resources.
2. Determines capacity and forecasted utilized project and personal (policy) hours of the resources.
3. For the Actual to Forecast Utilization report, determines actual utilized project and personal hours of the resources, taking into account adjustments to actual time.
4. Obtains descriptions and setID mappings.

Resource Utilization Calculations

Utilization is defined as the number of utilized hours in a period divided by the number of capacity hours in the same period. *Utilized time* is the total number of hours during a specified period of time that an employee plans to work (or has worked) on an activity that the organization includes in its utilization analysis. You can configure the type of project time—such as billable, nonbillable, and internal—and the type of personal (policy) time—such as training, vacation, and administration—and include this information in the definition of utilized time. You can also configure the system to use pending forecasts, include external resources, and include specific job codes when performing the calculations.

Control over the definition of utilized hours enables you to adapt to changing business requirements.

The capacity of a resource is defined as the employee's standard work hours minus company holiday hours. The Services Forecasting feature determines capacity at a calendar-week level, where a week is defined as Sunday through Saturday. For example, the calculation for a resource's capacity for a given week is:

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(8 hours [length of resource's standard work day] × 4 days [resource's standard work days in a week]) − (8 hours [length of resource's standard work day] × 0 holidays [standard company holidays for the week]) = 32 hours (capacity for a one week period)

Capacity is calculated for resources who are active during the reporting period.

Security and Access

You can use these security layers to restrict the amount of data that each user can analyze:

- Standard row-level security.

  Use row-level security to give users access to a specific list of business units from which to select when performing the analysis. At run time, the system requires users to select at least one human resources (HR) business unit on the Utilization Parameters - Business Units page or the Utilization Parameters - Organization Units page. The Business Unit field is a prompt-with-edit field that has a row-level security view that controls the business units from which the user can select, if row-level security is active.

- Tree security based on business unit security.

  Use tree security for users to analyze departments or locations by selecting from department or location trees that are associated with an HR business unit. On the Utilization Parameters - Organization Units page, users can only select from HR business units that are accessible to them through row-level security. The available department or location trees depend on the business units that a user can access.

See Also

PeopleTools PeopleBook: Security Administration

Defining Resource Utilization Parameters

To define resource utilization parameters, use the Utilization Definition component (RS_AGG_DEF).

This section discusses how to define resource utilization parameters for HR business units.

Page Used to Define Resource Utilization Parameters

Page Name	*Definition Name*	*Navigation*	*Usage*
Utilization Definition	RS_AGG_DEF	Set Up Financials/Supply Chain, Business Unit Related, Program Management, Forecasting, Utilization Definition, Utilization Definition	Define the parameters for calculating actual, capacity, and forecast utilization for each HR business unit.

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Defining Resource Utilization Parameters for Business Units

Access the Utilization Definition page (Set Up Financials/Supply Chain, Business Unit Related, Program Management, Forecasting, Utilization Definition, Utilization Definition).

Utilization Definition page

Use this page to define the rules for calculating capacity and actual and forecast utilization for each HR business unit.

Billing Action

Select all of the billing actions that constitute utilized project time. You can select one or more billing actions, or none at all. Options are *Billable*, *Internal*, and *Nonbill* (nonbillable).

The resource must enter a billing action for every entry of project hours in PeopleSoft Expenses or the Services Forecasting feature. When you identify which billing action field values are utilized time, you enable the Utilization and Capacity Application Engine process (RS_AGG_ENG) and the utilization analysis tools to treat actual and forecasted time consistently when determining the type of project time that counts as utilized time.

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Time Reporting Code

Specify which time reporting codes (TRCs) count as utilized personal time. The TRCs are setID-driven and defined on the Time Reporting Code page.

TRCs appear on the Forecast Time - Summary page, the Forecast Time - Forecast by Period page, and the PeopleSoft Expenses Time Report Summary page for resources to enter personal time. When you identify which TRC field values are considered as utilized time, you enable the Utilization and Capacity process (and the utilization analysis tools) to treat actual and forecast time consistently when determining which nonproject time counts as utilized time.

Job Code

Select the job code values to indicate which resources within the organization are analyzed by the Utilization and Capacity process and included in utilization calculations. This setting controls which resources are analyzed across the business unit. For example, if you measure utilization only for the information services support team, enter only the job codes that are associated with support team resources.

Available job codes are based on the HR business unit.

Note. If you do not enter a job code, or if no resources match the job codes that you select for the business unit, the system does not perform any capacity or utilization calculations.

Include External Resources

Select to include external resources (such as contractors) in the utilization calculations. Deselect to exclude resources with a non-employee status from the utilization calculations and analysis.

Note. Resources are treated as non-employees if the Personnel Status field (PER_STATUS) value is *N* (non-employee) for the employee ID (EMPLID).

Include Pending Forecasts

Select to have the analysis include forecasts that are pending (not yet submitted). To determine the appropriate setting, decide whether you want to analyze forecast utilization based on forecasted hours that are prepopulated by the Populate Time process or wait until resources have submitted their forecasts before analyzing the utilization data.

Note. Forecast status values of *Pending* and *Submitted* are different from the time report status values that contain actual hours entered into PeopleSoft Expenses.

Display Organization Tree

Select to display the Organizational Unit tree on the Utilization Parameters - Organization Units page. This option simplifies the process of selecting organizational units (such as departments, locations, and child departments and locations) for analysis.

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Updating Resource Utilization Data

To update resource utilization data for reporting, use the Utilization and Capacity Engines component (RS_AGG_AEP).

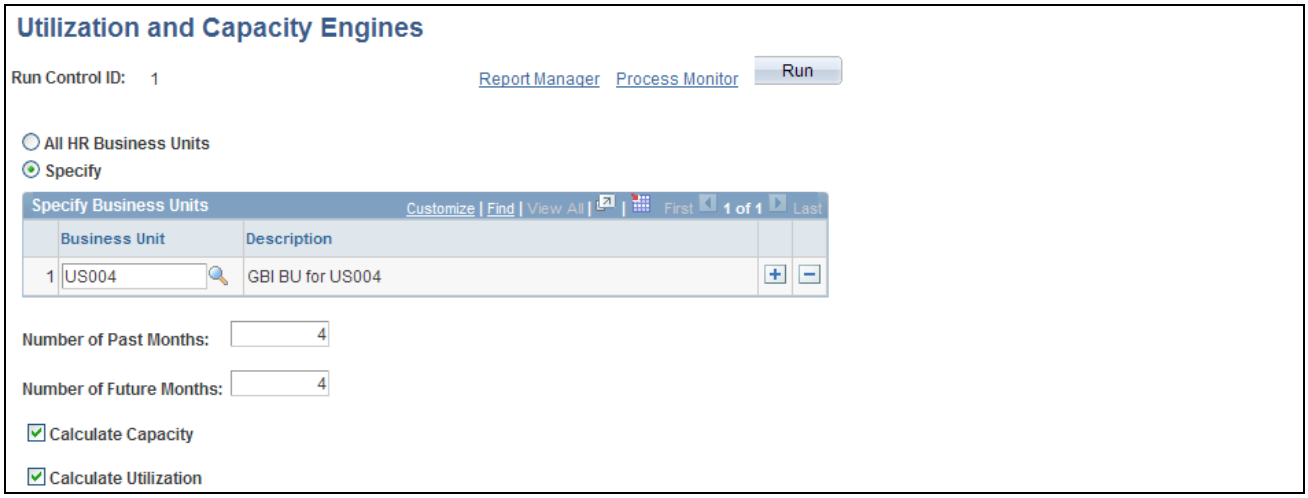
This section discusses how to run the Utilization and Capacity Application Engine process (RS_AGG_ENG) to update Utilization and Capacity data. The Utilization Interactive Reports are only as current as the most recent time you refreshed the Utilization and Capacity data.

Page Used to Update Resource Utilization Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Utilization and Capacity Engines	RS_AGG_AEP	Program Management, Forecasting, Refresh Capacity/Utilization, Utilization and Capacity Engines	Run the Utilization and Capacity process.

Running the Utilization and Capacity Application Engine Process

Access the Utilization and Capacity Engines page (Program Management, Forecasting, Refresh Capacity/Utilization, Utilization and Capacity Engines).



Utilization and Capacity Engines page

Use this page to run the Utilization and Capacity process by HR business unit. You can schedule the processes for any HR business units for which a utilization definition exists. For example, you can group the units by time zone so that the processes refresh utilization and capacity data at a time of day that is convenient for the majority of users in the region, or you can run the processes for all HR business units at once.

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You can analyze forecasted utilization, actual utilization, and capacity data with the data generated by the Utilization and Capacity engine.

All HR Business Units Select this option to run the Utilization and Capacity process for all HR business units that have a utilization definition.

Specify Select to run the process for a subset of HR business units.

Business Unit Enter the HR business units to include in this run control of the Utilization and Capacity process.

Number of Past Months Enter the number of months prior to the current date for which the Capacity or Utilization process calculates weekly capacity and utilized hours statistics. The process counts back from the current date by the number of months that are entered in this field, and it calculates capacity or utilized hours for all of the calendar weeks that fall within that range.

When past weeks are recalculated by a subsequent Capacity or Utilization process, weekly data in the Utilization and Capacity Cache record (RS_AGG_CACHE) is updated if the week's data already exists for a resource. If a week's data does not exist for a resource, the data is added to the record. The process does not delete historical data.

Note. A week is defined as Sunday through Saturday.

Number of Future Months Enter the number of months following the current date for which the capacity or utilization process calculates weekly capacity and utilized hours statistics. The process counts forward from the current date by the number of months that are entered in this field and calculates capacity or utilized hours for all of the calendar weeks that fall within that range.

When future weeks are recalculated by a subsequent Capacity or Utilization process, weekly data in the Utilization and Capacity Cache record (RS_AGG_CACHE) is updated if the week's data already exists for a resource. If a week's data does not exist for a resource, the data is added to the record. The process does not delete historical data.

Calculate Capacity Select to refresh capacity data.

The capacity calculations in this Application Engine process determine each resource's weekly capacity by calendar week, based on the rules that you specify on the Utilization Definition page. Capacity is defined as a resource's standard hours per calendar week minus company holidays. For the purposes of the Utilization and Capacity process and utilization interactive reports, calendar weeks begin on Sunday and end on Saturday.

You can calculate capacity without calculating utilization, and vice versa.

Calculate Utilization Select to refresh utilization data.

The utilization calculations in this process use the rules that you specify on the Utilization Definition page to calculate each resource's actual and forecasted utilized time by calendar week. It calculates actual utilized project hours, actual utilized personal hours, forecasted utilized project hours, and forecasted utilized personal hours.

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Run Click to initiate the process. The results are written to the Utilization and Capacity Cache record and used by PeopleSoft Analytic Calculation Engine to generate the utilization interactive reports.

Note. The Utilization and Capacity Cache record grows over time because the Utilization and Capacity process does not delete rows. Monitor the record and delete unnecessary rows based on the amount of history that you want to maintain.

Launching Resource Utilization Interactive Reports

To launch resource utilization interactive reports, use the Utilization Parameters component (RS_AGG_RUN).

This section discusses how to:

- Launch resource utilization interactive reports for multiple business units, departments, and locations.
- Launch resource utilization interactive reports for departments or locations in a single business unit.

Pages Used to Launch Resource Utilization Interactive Reports

Page Name	*Definition Name*	*Navigation*	*Usage*
Utilization Parameters - Business Units	RS_AGG_RUN	Program Management, Interactive Reports, Utilization, Utilization Parameters - Business Units	Enter the parameters for the Forecast Utilization interactive report or the Actual to Forecast Utilization interactive report for multiple HR business units.
Utilization Parameters - Organization Units	RS_AGG_RUN2	Select the Organization Units tab on the Utilization Parameters - Business Units page.	Enter the parameters for the Forecast Utilization interactive report or the Actual to Forecast Utilization interactive report for organization units belonging to a single HR business unit.

Launching Resource Utilization Interactive Reports for Multiple Business Units

Access the Utilization Parameters - Business Units page (Program Management, Interactive Reports, Utilization, Utilization Parameters - Business Units).

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Utilization Parameters - Business Units page

Start Date

Select the first date from which the system extracts data for the analysis.

Note. Although you can enter a start date of any day of the week, the interactive report always begins analyzing data starting on Sunday in the calendar week in which the selected date occurs.

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End Date

Select the last date from which the system extracts data for the analysis. You can enter an end date of any day of the week; however, the interactive report always covers data through Saturday in the calendar week in which the selected date falls.

For the Forecast Utilization interactive report, the end date must be less than or equal to the end date of the last forecast horizon period of the latest forecast time collection iteration for the general ledger (GL) business unit that is associated with the requested HR business unit. In addition, if you run a report with multiple HR business units that are associated with multiple GL business units, the end date is limited by the forecast horizon period end date of the GL business unit with the shortest forecast horizon period.

For example, suppose that you request a Forecast Utilization interactive report for two HR business units that map to different GL business units. Both GL business units specify weekly forecasting, but one specifies forecasts five weeks into the future and the other specifies forecasts ten weeks into the future. You must enter an end date that is less than or equal to the end date of the fifth week in the future.

For the Actual to Forecast Utilization interactive report, the end date must occur before or on the end date of the last PeopleSoft Expenses time entry reporting period for the GL business unit that is associated with the requested HR business unit. In addition, if you run a report with multiple HR business units that are associated with multiple GL business units, the end date is limited by the end date with the shortest time entry period.

For example, suppose that you request an Actual to Forecast Utilization interactive report for two HR business units that map to different GL business units. The first GL business unit requires semimonthly time report submissions, and the second GL business unit requires weekly time report submissions. The first GL business unit's current time entry period ends in nine days, and the second GL business unit's current time entry period ends in four days. You must enter an end date that occurs before or on the four days in the future.

Forecast Utilization

Select to analyze how the forecasted resource utilization compares to the organization's capacity to handle additional workloads.

Actual to Forecast Utilization

Select to analyze how the forecasted resource utilization compares to the actual resource utilization. Typically, you select this analysis if you enter a start date and end date that are earlier than the current date.

Launch Interactive Reports

After you select all the parameters that the system uses to extract information from the database, click Launch Interactive Reports to launch the interactive report.

Business Unit

Select an HR business unit for which you want to analyze data. To add business units to the analysis, add a new row and select another HR business unit.

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Department	Select to filter the analysis for specific departments. To add departments to the filter, add a new row and select another department. If you don't select any departments, the system returns all departments for the HR business units.
Location Code	Select to filter the analysis for specific locations. To add locations to the filter, click the button to add a new row and select another location. If you don't select any location codes, the system returns all locations for the HR business units.

Launching Resource Utilization Interactive Reports for a Single Business Unit

Access the Utilization Parameters - Organization Units page (select the Organization Units tab on the Utilization Parameters - Business Units page).

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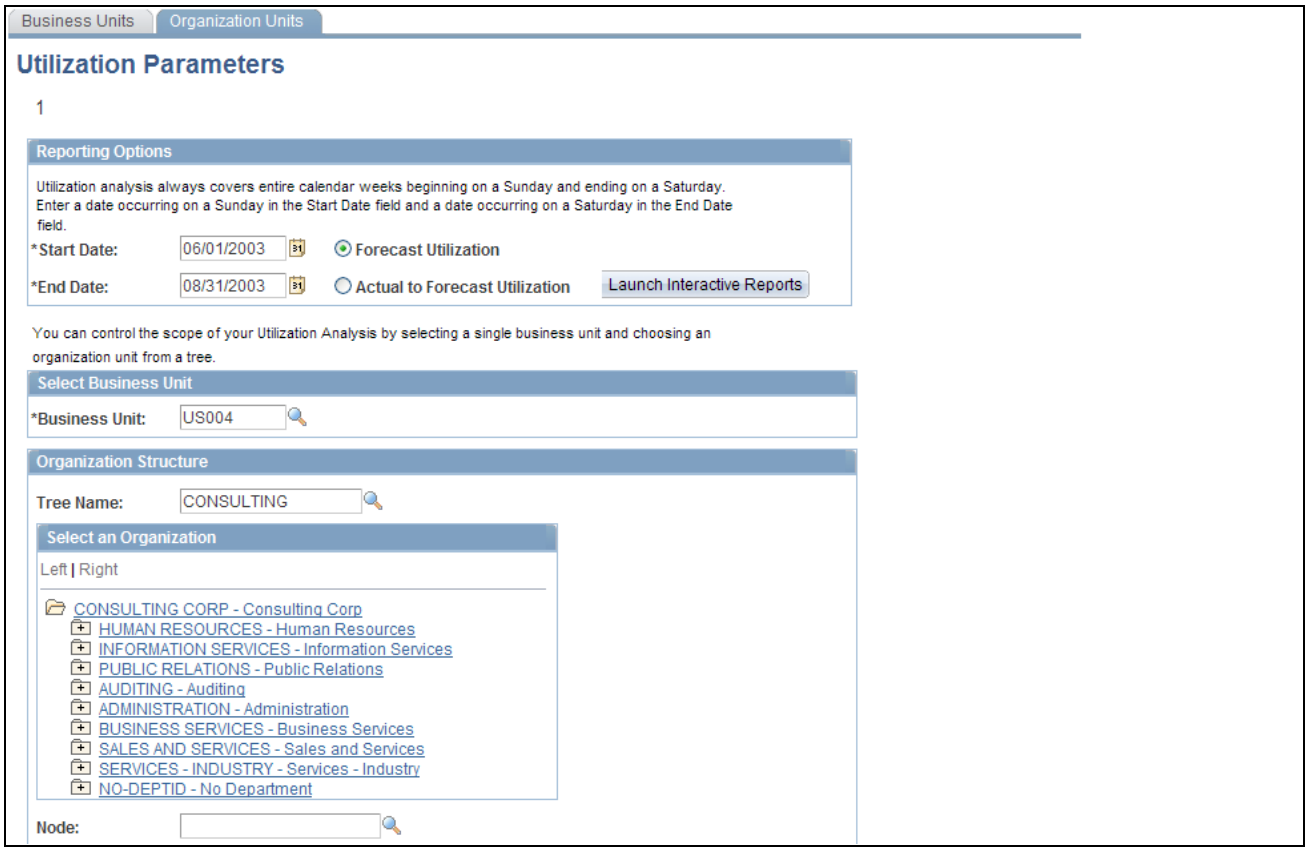

Utilization Parameters - Organization Units page

The reporting options are identical to the Utilization Parameters - Business Units page. However, the selection of the utilization parameters (business unit and organizational units) is different on this page.

Business Unit Select the HR business unit from which you want to extract data.

Tree Name Select a department or location tree that includes the department or location to analyze. If the administrator enables the Display Organization Tree option on the Utilization Definition page and PeopleSoft Resource Management is installed, the PeopleSoft Resource Management organizational unit tree appears. Otherwise, the list of trees contains only the trees that are associated with the specified HR business unit.

Select an Organization Select a department or location from which the system extracts data. You can select a node or detail value from the tree. If you select a node, all of the node child departments or locations are included in the report.

Node Displays the department or location node that you select on the tree. To use a different node, either select a different node on the tree or click Look up Node to select a node from a list.

Description Displays the department or location description if you selected a detail value from the tree.

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Analyzing Resource Utilization Interactive Reports

You can analyze data by the following dimensions: HR business unit, department, location, job code, and employee.

To create a different view and have PeopleSoft Analytic Calculation Engine recalculate the data, simply drag and drop dimensions onto different parts of the page. You can expand, collapse, and filter the data elements.

Note. Utilization interactive reports always calculate utilized hours, capacity, and utilization percentages for full calendar weeks. For example, if you request a start date on Wednesday and an end date of the following Wednesday, the interactive report includes the capacity and utilized hours for the two full calendar weeks in which the start and end dates appear.

This section discusses how to:

- Analyze actual to forecast utilization.
- Analyze forecast utilization.

Analyzing Actual to Forecast Utilization

Access the Forecast Analysis page (select Actual to Forecast Utilization on the Utilization Parameters - Organization Units page).

These are two examples of report views:

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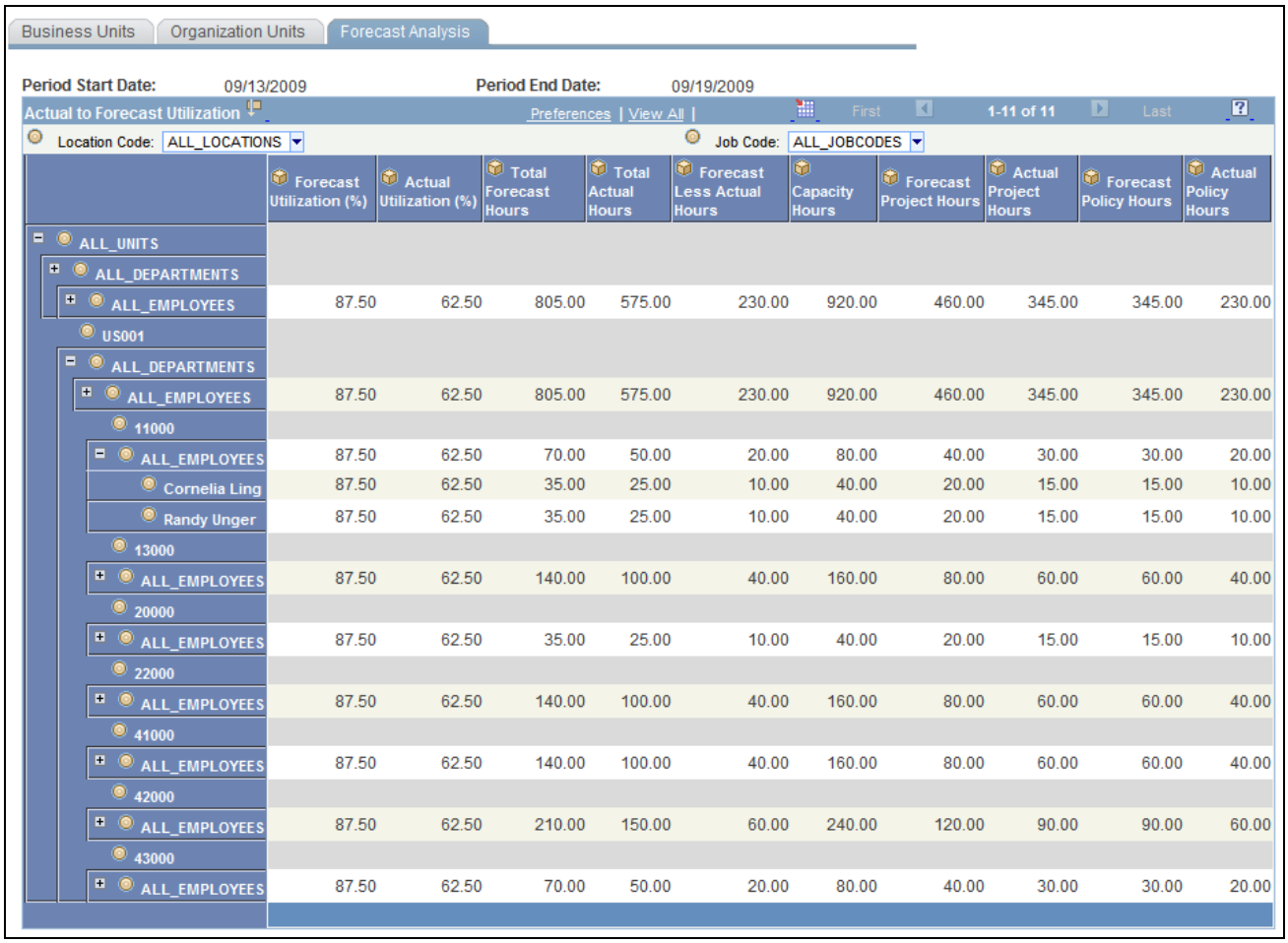

Business Units | Organization Units | Forecast Analysis

Period Start Date: 09/13/2009 Period End Date: 09/19/2009

Actual to Forecast Utilization | Preferences | View All | First 1-11 of 11 Last

Location Code: ALL_LOCATIONS Job Code: ALL_JOBCODES

	Forecast Utilization (%)	Actual Utilization (%)	Total Forecast Hours	Total Actual Hours	Forecast Less Actual Hours	Capacity Hours	Forecast Project Hours	Actual Project Hours	Forecast Policy Hours	Actual Policy Hours
ALL_UNITS										
ALL_DEPARTMENTS										
ALL_EMPLOYEES	87.50	62.50	805.00	575.00	230.00	920.00	460.00	345.00	345.00	230.00
US001										
ALL_DEPARTMENTS										
ALL_EMPLOYEES	87.50	62.50	805.00	575.00	230.00	920.00	460.00	345.00	345.00	230.00
11000										
ALL_EMPLOYEES	87.50	62.50	70.00	50.00	20.00	80.00	40.00	30.00	30.00	20.00
Cornelia Ling	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
Randy Unger	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
13000										
ALL_EMPLOYEES	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
20000										
ALL_EMPLOYEES	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
22000										
ALL_EMPLOYEES	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
41000										
ALL_EMPLOYEES	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
42000										
ALL_EMPLOYEES	87.50	62.50	210.00	150.00	60.00	240.00	120.00	90.00	90.00	60.00
43000										
ALL_EMPLOYEES	87.50	62.50	70.00	50.00	20.00	80.00	40.00	30.00	30.00	20.00

Example of Actual to Forecast Utilization interactive report by business unit, department, and employee

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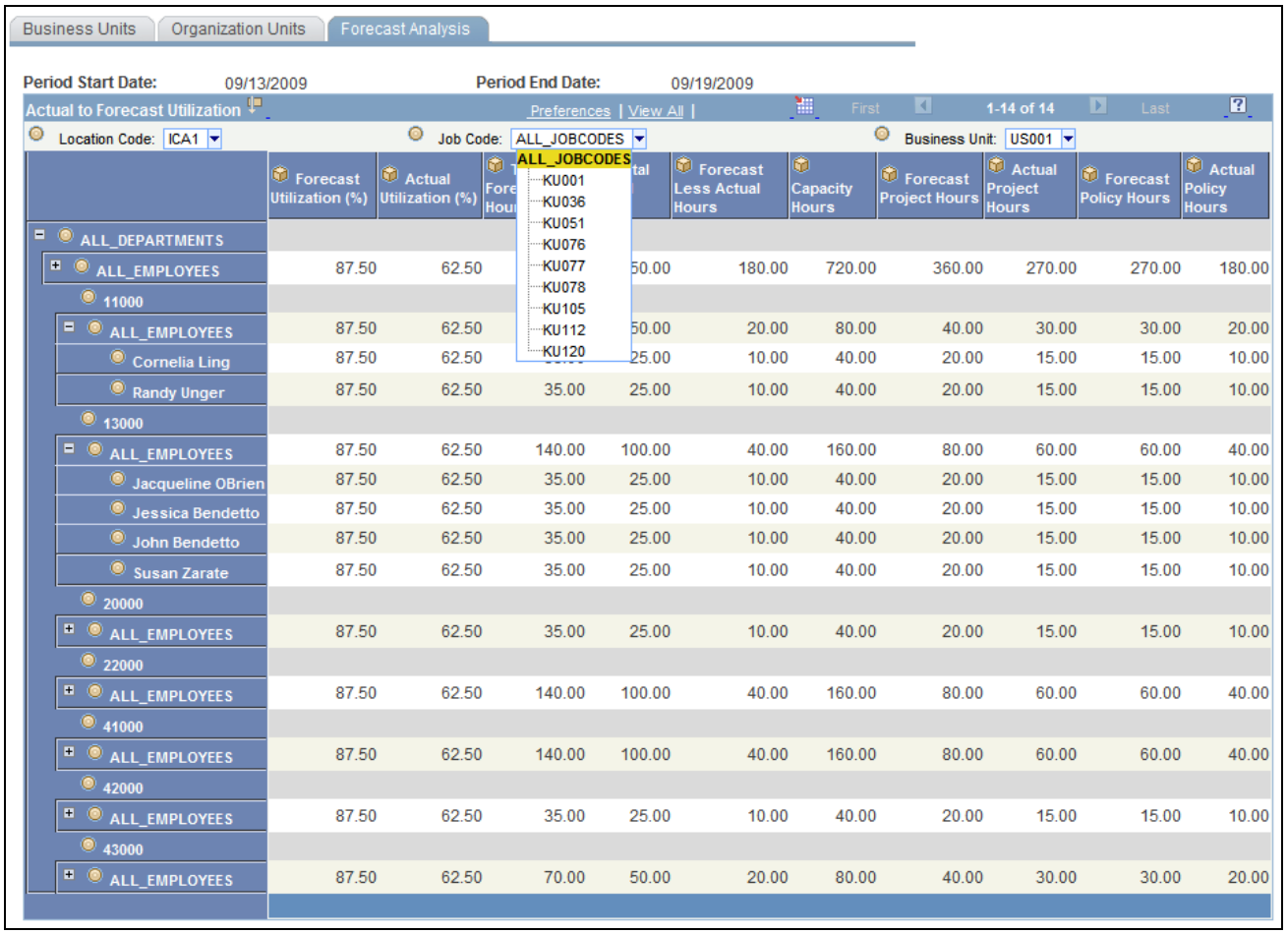

Example of Actual to Forecast Utilization interactive report by department and job code showing list of job code options

Forecast Utilization (%) Forecast Utilization Percentage
The percentage of the capacity hours that are forecasted as utilized for the given time period and specified parameters. The value is the result of dividing the total forecast utilized hours by the capacity hours.

Actual Utilization (%) Actual Utilization Percentage
The percentage of actual resource hours that were used compared to resource capacity for the given time period and specified parameters. The value is based on dividing the total actual utilized hours by the capacity hours.

Total Forecast Hours
The total number of forecasted utilized hours for the given time period and specified parameters. The value is the sum of the forecasted utilized project hours and the forecasted utilized personal hours.

Total Actual Hours
The total number of hours that were actually used for the given time period and specified parameters. The value is the sum of the actual utilized project hours and the actual utilized personal hours.

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Forecast Less Actual Hours	The difference between the forecasted utilized hours and the hours that were actually utilized for the given time period and specified parameters. The value is based on subtracting the total actual utilized hours from the total forecast utilized hours.
Capacity Hours	The total number of standard resource hours available to engage in an activity that is considered utilized for the given time period and specified parameters.
Forecast Project Hours	The total number of forecasted project hours to be worked and considered as utilized for the given time period and specified parameters.
Actual Project Hours	The total number of project hours actually worked and treated as utilized for the given time period and specified parameters.
Forecast Policy Hours	The total number of forecasted personal hours that are considered utilized for the given time period and specified parameters.
Actual Policy Hours	The total number of personal hours actually worked and treated as utilized for the given time period and specified parameters.

Analyzing Forecast Utilization

Access the Forecast Analysis page (select Actual to Forecast Utilization on the Utilization Parameters - Organization Units page).

These are two examples of report views:

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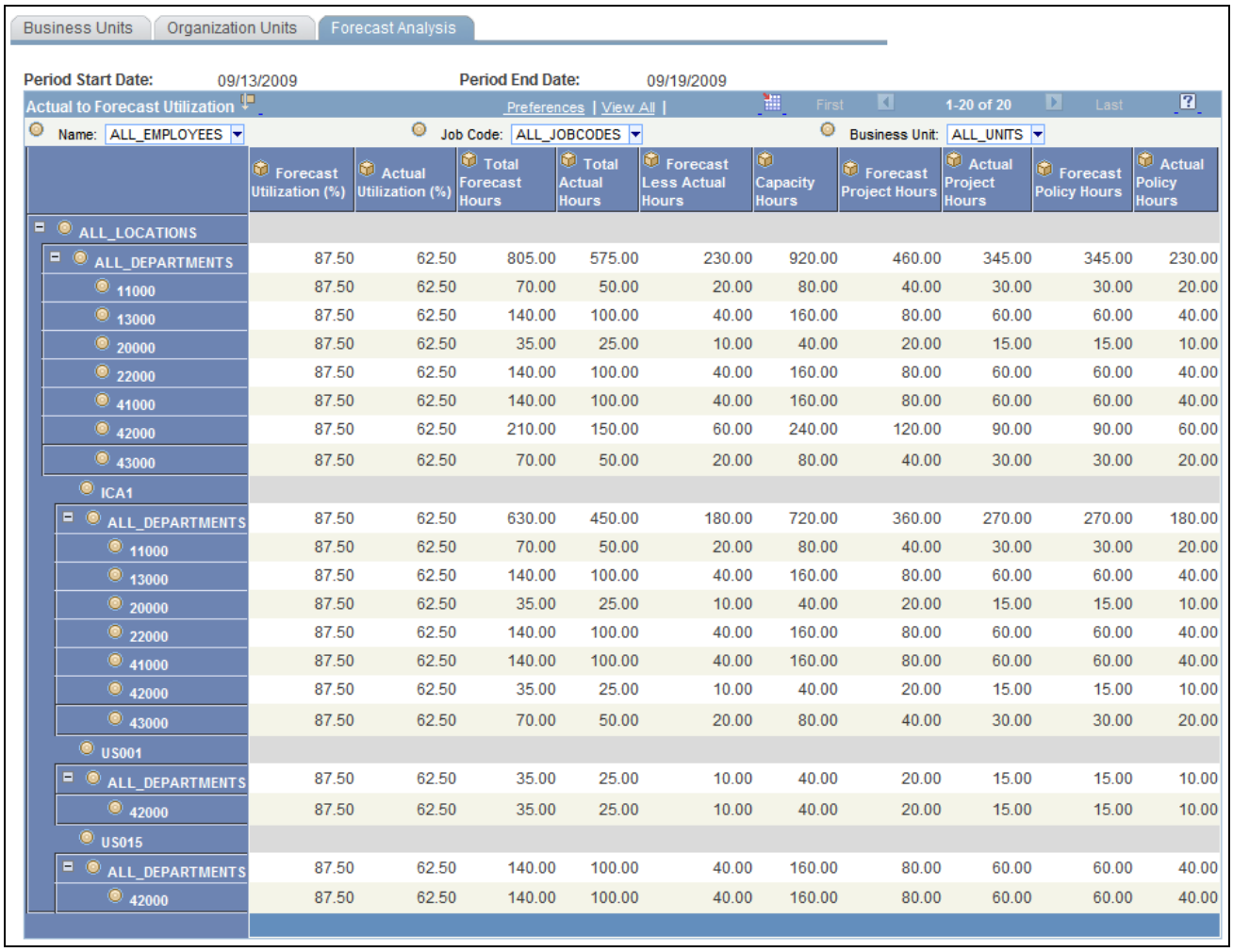

Business Units | Organization Units | Forecast Analysis

Period Start Date: 09/13/2009 Period End Date: 09/19/2009

Actual to Forecast Utilization | Preferences | View All | First 1-20 of 20 Last

Name: ALL_EMPLOYEES Job Code: ALL_JOBCODES Business Unit: ALL_UNITS

	Forecast Utilization (%)	Actual Utilization (%)	Total Forecast Hours	Total Actual Hours	Forecast Less Actual Hours	Capacity Hours	Forecast Project Hours	Actual Project Hours	Forecast Policy Hours	Actual Policy Hours
ALL_LOCATIONS										
ALL_DEPARTMENTS	87.50	62.50	805.00	575.00	230.00	920.00	460.00	345.00	345.00	230.00
11000	87.50	62.50	70.00	50.00	20.00	80.00	40.00	30.00	30.00	20.00
13000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
20000	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
22000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
41000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
42000	87.50	62.50	210.00	150.00	60.00	240.00	120.00	90.00	90.00	60.00
43000	87.50	62.50	70.00	50.00	20.00	80.00	40.00	30.00	30.00	20.00
ICA1										
ALL_DEPARTMENTS	87.50	62.50	630.00	450.00	180.00	720.00	360.00	270.00	270.00	180.00
11000	87.50	62.50	70.00	50.00	20.00	80.00	40.00	30.00	30.00	20.00
13000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
20000	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
22000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
41000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
42000	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
43000	87.50	62.50	70.00	50.00	20.00	80.00	40.00	30.00	30.00	20.00
US001										
ALL_DEPARTMENTS	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
42000	87.50	62.50	35.00	25.00	10.00	40.00	20.00	15.00	15.00	10.00
US015										
ALL_DEPARTMENTS	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00
42000	87.50	62.50	140.00	100.00	40.00	160.00	80.00	60.00	60.00	40.00

Example of Forecast Utilization interactive report by location and department

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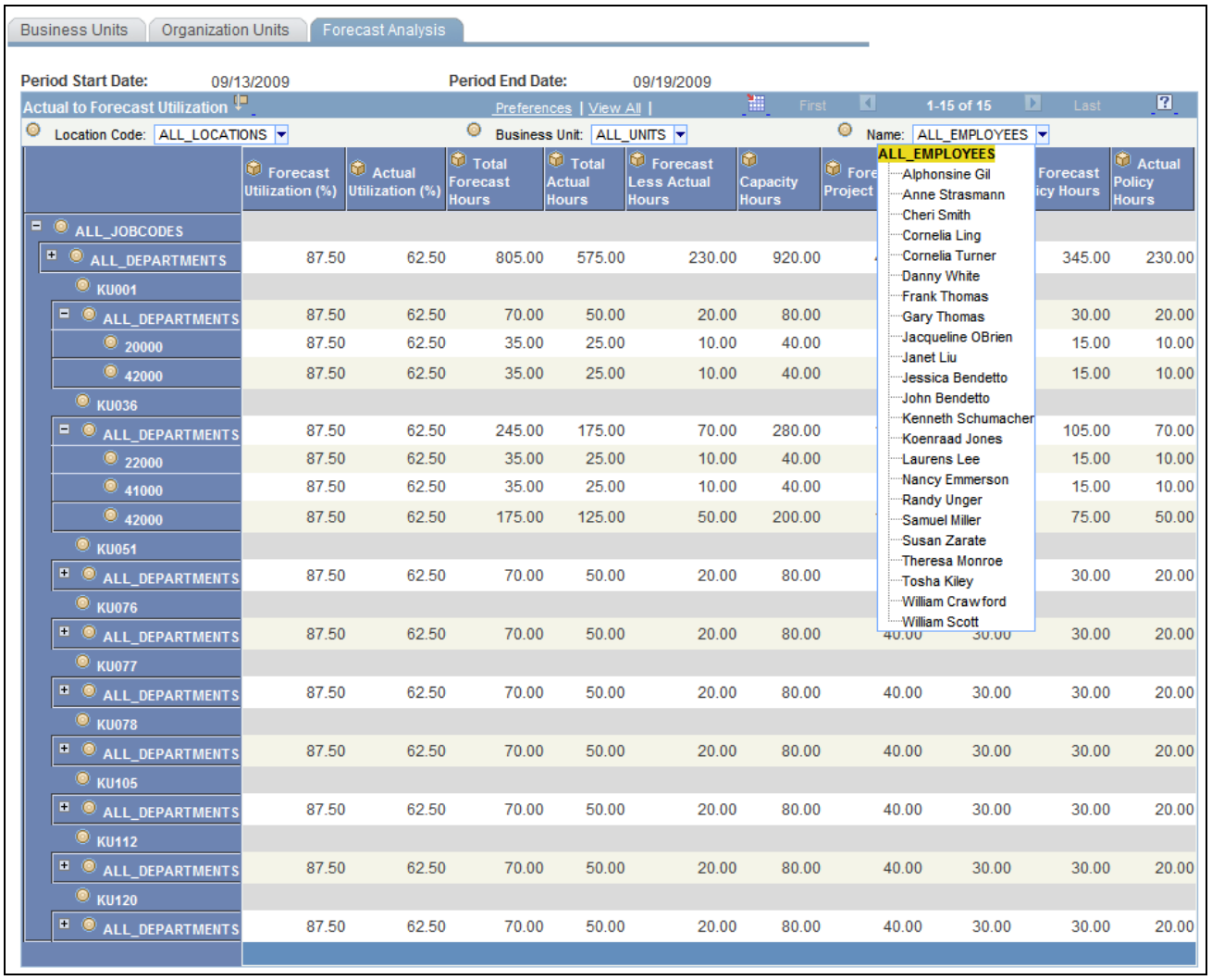

Example of Forecast Utilization interactive report by location and job code, showing list of employees

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Chapter 22

Integrating with Primavera P6

This chapter provides overviews of PeopleSoft integration with Primavera P6, synchronization templates, work breakdown structure, resource assignments, project teams, budgets, timesheets, hours worked, actual costs, commitments, percent complete, lists common terms, and discusses how to:

- Set up synchronization templates.
- Set up Primavera P6 integration options for a business unit.
- Set up Primavera P6 integration options of a project.
- Synchronize data between PeopleSoft and Primavera P6.
- View the synchronization log.
- Archive synchronized data.

Note. From this point in this document Primavera P6 Enterprise Project Portfolio Management R8.1 is referred to as Primavera P6.

Understanding PeopleSoft Integration with Primavera P6

This section discusses:

- Integration data flow.
- Maintain data in PeopleSoft and Primavera P6.

Integration Data Flow

This diagram illustrates the PeopleSoft to Primavera P6 integration data flow:

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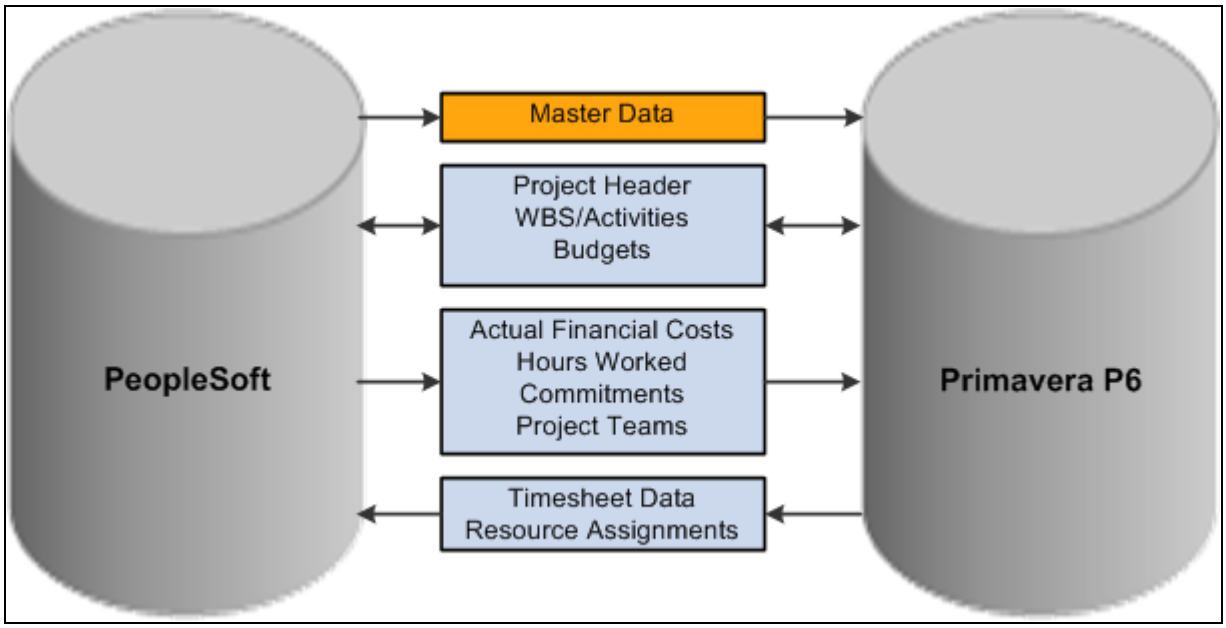

PeopleSoft Program Management to Primavera P6 data flow

Updates to master data can only occur in PeopleSoft. The master data from PeopleSoft must be synchronized to Primavera P6 before projects are created in Primavera P6 if you plan to integrate resource assignments or timesheet data.

Project data can be created in either database (PeopleSoft or Primavera P6). The project header, work breakdown structure of activities (WBS/Activities), and budget data can be sent from PeopleSoft to Primavera P6 or from Primavera P6 to PeopleSoft. Master data and Project data (such as actual financial costs, hours worked, commitments, and project teams) only flow from PeopleSoft to Primavera P6. Resource Assignments (from projects) and Timesheet data only flows from Primavera P6 to PeopleSoft.

Work breakdown structure levels are used to maintain and summarize activity data.

The data that is sent from the source system (regardless of the direction) overwrites the data in the target system.

You should pre-determine which system is the source of truth for each object of data such as activities, budgets, resources, and so on. Only the source system should be updated for each object. For example, if you are creating projects in Primavera P6 and updating the work breakdown structure and resource assignments in Primavera P6, then you should only import the WBS and resource assignments from Primavera P6 to PeopleSoft. If you export this data from PeopleSoft to Primavera P6, then you could overwrite source data. The system does not warn or prevent you from doing this.

Projects should only be synchronized in a single run control to prevent conflicts when updating the project data. If you schedule more than one run control (in parallel) to synchronize data, the system does not verify that a project is included in multiple run control IDs. For example, if two run control ID's are processed at the same time and they have an overlapping range of project IDs, the project IDs may be processed twice.

PeopleSoft maintains a synchronization log that captures the status of data integration between PeopleSoft and Primavera P6.

Process flow diagrams (one for project data, one for master data, and one for timesheet data) are available on My Oracle Support (MOS) https://support.oracle.com/CSP/ui/flash.html, Note: 1361220.1.

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Note. The integration between PeopleSoft Program Management 9.1 and Primavera P6 is not supported on an Informix database.

Data in PeopleSoft and in Primavera P6 Maintenance

There are multiple objects that should be kept in sync between PeopleSoft and Primavera P6. Some are required and some are optional. There is no automated process to synchronize these objects. Therefore you must manually maintain these objects in both systems. For example, if a new business unit is created in PeopleSoft, you will have to manually add that business unit in the equivalent Primavera P6 project code field.

This table shows the objects that should be maintained in PeopleSoft and in Primavera P6:

Item	*Required*	*Comment*
Master Calendar - Project Calendar	Yes	Manual setup in PeopleSoft and Primavera P6.
Job Codes	No	Manual setup in PeopleSoft. No setup required in Primavera P6.
Project Types	Yes	Manual setup in PeopleSoft. Manually set up the list of valid values in the Project Type project code in Primavera P6.
Business Unit	Yes	Manual setup in PeopleSoft. Manually set up the list of valid values in the Business Unit project code in Primavera P6.
Enterprise Project Structure	Yes	Manually set up an EPS node in Primavera P6. This is where newly created projects will initially reside, when exported from PeopleSoft.
Role	Yes	Manual setup in PeopleSoft and Primavera P6. The PROJ_ROLE_CODE DVM must be kept current between PeopleSoft and Primavera P6.
Role Rates	Recommended	Manual setup in PeopleSoft and Primavera P6.
Timesheet Periods	Yes	Manual setup in PeopleSoft and Primavera P6.

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Item	*Required*	*Comment*
Overhead Code	Yes	Manually set up Overhead Codes in Primavera P6. Manually set up Time Reporting Codes (TRC) in PeopleSoft. The TRC_CODE DVM must be kept current to map Primavera P6 Overhead Codes to PeopleSoft TRC Codes.

Understanding Synchronization Templates

Synchronizing data between PeopleSoft Program Management and Primavera P6 can only be initiated from PeopleSoft.

Synchronization templates are primarily used for existing projects. When synchronizing net new projects, the system does not refer to a synchronization template to determine the objects selected for export or import. However, when importing net new projects, the synchronization template is used to determine the WBS level to import. In addition, when exporting net new projects, the synchronization template is used to determine the type of resource to export when the Project Team check box is selected on the Synchronize Net New Projects run control page.

When synchronizing existing projects, synchronization templates determine the type and direction of information that will be imported from Primavera P6 to Program Management, and exported from Program Management to Primavera P6.

A synchronization template is required to be set up as a default for the business unit on the Project Costing Options – Primavera page. This ensures that all projects that are created for that business unit have a synchronization template. The synchronization template can be changed or modified for a project on the General Information – Primavera page.

The synchronization template determines the direction of synchronization for specific objects such as the project header or the work breakdown structure (WBS). This allows you to synchronize multiple projects at the same time, even though the direction of information is different from one project to the next. This also enables you to view a project and determine the source of truth for the project. In addition, more than one project can use the same template. Therefore, if you are going to change a template, you may want to consider creating a new template to ensure that you are not affecting another project.

You can change the direction in which information is transferred between PeopleSoft and Primavera P6 by modifying the synchronization template for the project, or by creating a new synchronization template and assigning it to the project. However, use caution when modifying project templates. A single source of truth for a project should exist for each object type. Therefore, when modifying the synchronization template for a project, ensure that the source of truth for an object does not change or that it is being done deliberately. If the source of truth is changed, then the system may overwrite data that was previously synchronized.

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Understanding Work Breakdown Structure

If the work breakdown structure (WBS) level that is held in PeopleSoft is less than (the data is held at a summary level in PeopleSoft) what is held in Primavera P6, then Primavera P6 must summarize data for activity dates, duration, resource assignment dates, and planned costs.

It is recommended that you don't make the WBS level smaller in PeopleSoft, after you have set the WBS level. If the WBS level is resynchronized at a shallower level, then the activities that were at a deeper level are not deleted. Instead, these activities are set to an Inactive status and moved to the bottom of the WBS structure. For example, if you import data into PeopleSoft rolled up to WBS level 3, then you should not import it at a level 2 at a later time, which is shallower.

When importing WBS activities from Primavera P6 to PeopleSoft:

- The level that is selected in the Import Work Breakdown Options section, on the Synchronization Template page, determines the level to which WBS activities are transferred.
- The Synchronize Existing Projects page enables you to select certain objects such as activities.

  However, the system uses the synchronization template to determine the direction that the data is to be transferred.
- If the WBS level selected on the synchronization template is less than the level that is held in Primavera P6, then the roll-up of activity dates and percent complete occurs in Primavera P6 prior to the synchronization process.
- If the WBS level selected on the synchronization template is greater than the level that exists in PeopleSoft (for example, the WBS level on the synchronization template is 4 and the current level for a PeopleSoft project is 2), then all WBS levels (up to level 4) are imported into PeopleSoft when the synchronization process runs.

  If the WBS level selected on the synchronization template is less than the level that was previously imported to PeopleSoft, then a message is displayed indicating that the existing activities will be inactivated, moved to the bottom of the WBS, and costs will not be rolled-up to higher-level activities.
- If you want to import the percent complete of all activities you can set the Percent Complete calculation method to Manual for the project on the Project Definitions - Project Costing Definition page, and select Include Percent Complete on Activity Import on the synchronization template for the project.

When exporting WBS activities from PeopleSoft to Primavera P6, the activity is transferred on a one-to-one basis. There is no roll-up for activities.

Understanding Resource Assignments

Resource assignments can only be imported from Primavera P6 to PeopleSoft. Prior to assigning resources in Primavera P6, you should export the resource master data from PeopleSoft to Primavera P6. It is recommended that you create your resource master data in PeopleSoft and then export this data to Primavera P6. This ensures that PeopleSoft is the source of truth for all master data.

If a role assignment is created in Primavera P6 without specifying a resource name, then that role assignment is imported into PeopleSoft as a generic labor resource during synchronization.

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Resource assignments are imported at the level to which they are assigned. For example, if individual resources are assigned, then individual resources are imported. If role assignments are assigned, then role assignments are imported. This allows for a combination of resources and roles within one project.

When importing resource assignments from Primavera P6 to PeopleSoft:

- All resource assignments (activity team members) are imported regardless of whether the resource is new or existing.
- The absence of a resource assignment from Primavera P6 indicates that the resource is no longer assigned to the activity.

  Therefore, if an activity team member is created from a Primavera P6 synchronization, and that activity team member is not sent to PeopleSoft in subsequent synchronizations, then the PeopleSoft system assumes that the resource assignment was deleted in Primavera P6 and should be deleted from the PeopleSoft activity team as well. However, the resource remains on the project team in PeopleSoft.
- The resources are added to the project team and schedule dates are created, or updated, within the project team based on the project start and end dates.

  Resource assignment dates are not recorded for each activity.

When a resource assignment is created in PeopleSoft, Primavera P6 is not updated because resource assignments are not exported from PeopleSoft to Primavera P6. Inbound messages containing resource assignments from Primavera P6 will not contain this resource assignment. In this case, the resource assignment is not deleted from the activity, in PeopleSoft, because the resource was created in PeopleSoft and is used by other PeopleSoft features.

If the WBS is imported at a rolled-up, summary level, then Primavera P6 sends all resource assignments for a particular WBS item with the WBS item ID. This data is rolled up to the WBS level specified on the synchronization template. Some WBS items may have duplicate assignments for the same resources. In this case, PeopleSoft merges the duplicate assignments because PeopleSoft does not allow a resource to be assigned to an activity more than once.

If a duplicate resource exists on an activity that was imported from Primavera P6 to PeopleSoft, then PeopleSoft will merge the resource data that is duplicated.

When resource assignments are imported into PeopleSoft, they are initially imported at the activity team level. However, PeopleSoft requires that every activity team member must be on the project team. Therefore, the Third-party Loader process adds the activity team member to the project team level in PeopleSoft.

Understanding Project Teams

Project team data can only be exported from PeopleSoft to Primavera P6. Project team data includes only named employee resources, named asset resources, or both. Material resources are not exported.

Employee and asset resources are exported at the project header level, not at the activity level. They can also be exported at the WBS level if the WBS was previously imported at a rolled-up summary level.

Project team data is extracted from the PeopleSoft Program Management project team member table (PROJECT_TEAM) and exported to Primavera P6 Planning Resources at the project level when:

- The Project Team check box is selected for the Synchronize Net New Projects or the Synchronize Existing Projects processes.

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- Project team members were not originally imported from Primavera P6 (using the Resource Assignments option).
- These check boxes are selected on the Synchronization Template that is associated with the project:
  - Project Team.
  - Include Labor Resource Assignments, Include Equipment Assignments, or both.
- If PeopleSoft Resource Management is not installed, then all named labor resources are exported to Primavera P6.
- If PeopleSoft Resource Management is installed, then named labor resources are only exported to Primavera P6 if their resource status is Committed.

Project team data is only extracted to the Primavera P6 Planning Resource WBS level if the WBS was previously imported at a rolled-up summary level. This data is extracted from the PeopleSoft Program Management activity team table (PROJ_ACT_TEAM) when:

- The Project Team check box is selected for the Synchronize Existing Projects process.
- Project activity members did not originate from Primavera P6 and imported as resource assignments.
- The WBS was imported from Primavera P6 at a rolled-up summary level.
- These check boxes are selected on the Synchronization Template that is associated with the project:
  - Project Team.
  - Include Labor Resource Assignments, Include Equipment Assignments, or both.

Resource Assignments versus Project Teams

The integration of project and activity resources can originate from Primavera P6 or PeopleSoft Program Management. In this diagram:

- The red lines illustrate that if you choose to manage your project resources in PeopleSoft, you can build your project and activity team in PeopleSoft, and then export the data to Planning Resources in Primavera P6.

  In Primavera P6, resource assignments need to be manually created based on Planning Resources.
- The blue lines illustrate that if you choose to manage your project resources in Primavera P6, you can create your activity resource assignments in Primavera P6, and then import the data to the Activity Team in PeopleSoft Program Management.

  The data automatically flows to the PeopleSoft project team as well.

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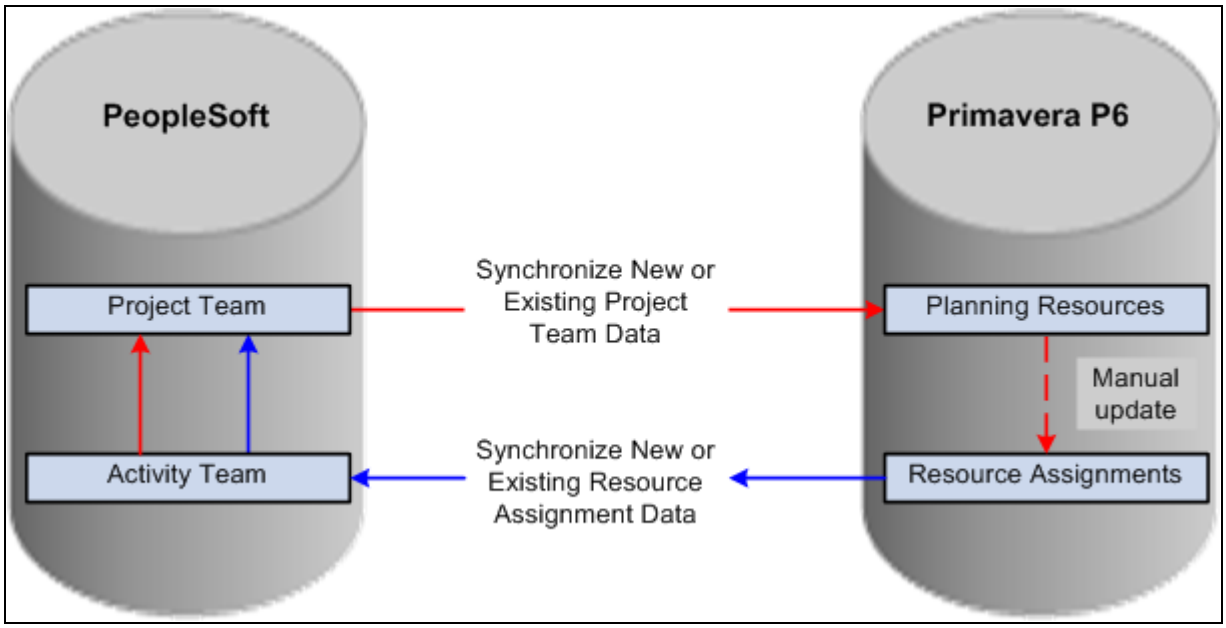

Primavera P6 Resource Assignments versus PeopleSoft Project Teams

Primavera P6 Resources Assignments can only be imported from Primavera P6 to PeopleSoft. In PeopleSoft, those resources assignments are imported at the activity team level, which then flows to the project team.

PeopleSoft project teams can only be exported to Primavera P6. In Primavera P6, those project teams are sent to planning resources.

In Primavera P6, you can manually create resource assignments based on planning resources.

Deleting Project Team Members

If a resource is deleted from a project team in PeopleSoft, the resource is not subsequently deleted from the planning resources in Primavera P6. The resource must be manually deleted from Primavera P6 planning resources.

Understanding Budgets

Budget data can be synchronized between Primavera P6 and PeopleSoft.

Importing Budget Data From Primavera P6 to PeopleSoft

When importing budget data from Primavera P6 to PeopleSoft:

- The Primavera P6 data that is used to create the budget in PeopleSoft comes from the Summary Planned Cost amounts at the WBS level. It does not come from the Primavera P6 project budget.
- The Project Costing Third-Party Loader application engine process is used to import budget data.
- Summary Planned Cost data from Primavera P6 is imported into PeopleSoft at the WBS level, not at the activity level.

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- If the WBS level selected on the synchronization template is less than the level that is held in Primavera P6, then the roll-up of the budget data must occur in Primavera P6 prior to the synchronization process.

  Therefore, you should run the Summarize Projects process in Primavera P6 prior to importing this budget data. If you do not run the Summarize Project process in Primavera P6, then budget amounts are not created or updated during the import to PeopleSoft process.

- Each time budget data is imported to PeopleSoft, a new version is created during the synchronization process in PeopleSoft.

  - The new version of the budget is created with an inactive status. To make this new budget active, you must review, activate, and finalize the new version of the budget in PeopleSoft.

  - The new version of the budget is transferred at the WBS level and at the project level. The total budget and the WBS level budgets are updated.

- If the WBS to which a budget has been assigned does not exist in the PeopleSoft system, the system will abort the synchronization process for that budget item and create a message in the synchronization log. The system continues synchronizing the remaining budget items.

Exporting Budget Data From PeopleSoft to Primavera P6

When exporting budget data from PeopleSoft to Primavera P6:

- Budget data is extracted from the Project Costing transaction table (PROJ_RESOURCE).

  If you are using Project Costing budgeting, you must finalize your budget before exporting the budget to Primavera P6.

- The budget amount that is exported is the Total Budget amount, which is calculated, or aggregated, in PeopleSoft at the WBS (summary activity) level and the project header level.

- When exported from PeopleSoft, the Total Budget amount is formatted into two fields within the outbound message; Original Budget and Current Budget.

  For a project or WBS object instance, the same budget amount value is written to the Original Budget and Current Budget fields. Primavera P6 determines how these amounts are recorded or updated to the corresponding structure in Primavera P6.

Understanding Timesheets

Timesheet data can only be imported from Primavera P6 to PeopleSoft.

Timesheet data can be imported into PeopleSoft Project Costing or PeopleSoft Expenses:

- If PeopleSoft Expenses is installed and selected as the target destination for timesheet data, then time reports are created in Expenses.

  If these time reports are to be sent to Project Costing, the Expenses to Project Costing process (PC_EX_TO_PC) is used to integrate the time report data.

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- If PeopleSoft Expenses is installed and selected as the target destination for timesheet data, and if the timesheet data in Expenses is to be sent to HCM Time and Labor, the Expenses to HR process (EX_TIME_STG) is used to integrate the timesheet data from Expenses to HR Time and Labor.
- If PeopleSoft Project Costing is selected as the target destination for timesheet data, the timesheet hours are imported directly to the Project Costing transaction table (PROJ_RESOURCE).

When importing timesheet data into PeopleSoft, the request is limited to 999 employees for a single run control. The system processes only one timesheet per employee per period.

After timesheet data is entered for a project, the WBS summarization level should not be changed on the synchronization template for the project. Changes to the WBS level of a project could result in time that was entered against WBS 1, appearing against WBS 2 and as a duplicate record.

Primavera P6 setup should not allow negative hours and not allow more than 24 hours per day.

The Timesheet Auto Submission Approval option in Primavera P6 is not supported with the PeopleSoft to Primavera P6 integration feature.

Understanding Hours Worked

Hours worked can only be exported from PeopleSoft to Primavera P6.

Hours worked is the total amount of hours for the activity ID, for all resources on that activity. They are not hours per resource, per activity.

When exporting hours worked from PeopleSoft to Primavera P6:

- The hours worked is sent as an accumulated total amount of hours, to date, by activity ID.
- The hours worked is an attribute of the WBS (summary level) and activity (detail level) to which it belongs.
- When synchronizing existing projects, if the activity ID does not exist in Primavera P6, then a message is created in the synch log stating that the hours for the activity failed and the synchronization process aborted for that activity.

  The system continues synchronizing the remaining data.

Understanding Actual Costs, Commitments, and Percent Complete

This section discusses:

- Actual costs.
- Commitments.
- Percent complete.

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Actual Costs

Actual cost data can only be exported from PeopleSoft to Primavera P6.

There are two options to send actual cost data:

- Actual cost data can be sent as a total summed amount.
- Actual cost data can be sent by source type, where actual cost data is sent as a total summed amount and it is also broken into transaction identifiers for each activity and at the project level.

This is determined for each business unit in the Level to Export Actual Cost field on the Project Costing Options - Primavera page.

Commitments

Commitments, commitment reversals, and commitment adjustments (as designated by PeopleSoft Project Costing analysis types) can be sent in to Primavera P6. Commitments are sent at the activity and WBS level, and also as a total at the project level.

You select the commitment analysis group that represents the commitments on the Project Costing Options – Primavera page.

Percent Complete

When importing net new projects, all object types are imported and the system uses the synchronization template for the business unit to determine if percent complete is to be imported with the WBS/Activities.

When importing existing projects:

- If WBS/Activities is not selected on the run control page, then percent complete is not imported.
- If WBS/Activities is selected on the run control page, then the system uses the project synchronization template to determine if percent complete is to be imported with the WBS/Activities.

When exporting net-new or existing projects:

- If WBS/Activities is not selected on the run control page, then percent complete is not exported.
- If WBS/Activities is selected on the run control page, then the system uses the project synchronization template to determine if percent complete is to be exported with the WBS/Activities.

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Common Terms and Elements Used in this Chapter

PeopleSoft errors versus warnings

Errors suppress individual data fields from being sent and prevent the record from being sent. Errors will stop processing for the object and must be corrected so that the record can be sent.

Warnings suppress individual data fields from being sent. When this occurs, the record is still sent, but the data field that has the warning will be blank or set to a default value for the warning. These warnings should be corrected so that the next time the data is synchronized, the data field can be sent.

PeopleSoft application errors and warnings

Application errors and warnings occur when data being synchronized violate a business rule in PeopleSoft Program Management or Primavera P6.

PeopleSoft message failure

A message failure is not the same as application errors or transformation errors, where specific error conditions can be checked and reported by the system. A message failure is unexpected, such as a problem with Integration Broker.

PeopleSoft transformation errors and warnings

Transformation errors and warnings occur when data cannot be transformed from Primavera data to PeopleSoft data, or from PeopleSoft data to Primavera data. This may occur when Domain Value Maps (DVMs) are not kept up to data. Transformation errors can also be the result of data that is bypassed because its parent is in error.

Setting Up Synchronization Templates

This section discusses how to set up synchronization templates.

Page Used to Set Up Synchronization Templates

Page Name	*Definition Name*	*Navigation*	*Usage*
Synchronization Template	PGM_P6_TMPLT_DEFN	Program Management, Primavera Integration, Synchronization Template Click the Add or Modify Template link on the Project Costing Options – Primavera page. Click the Add or Modify Template link on the Project Definitions – Primavera page	Set up synchronization template parameters.

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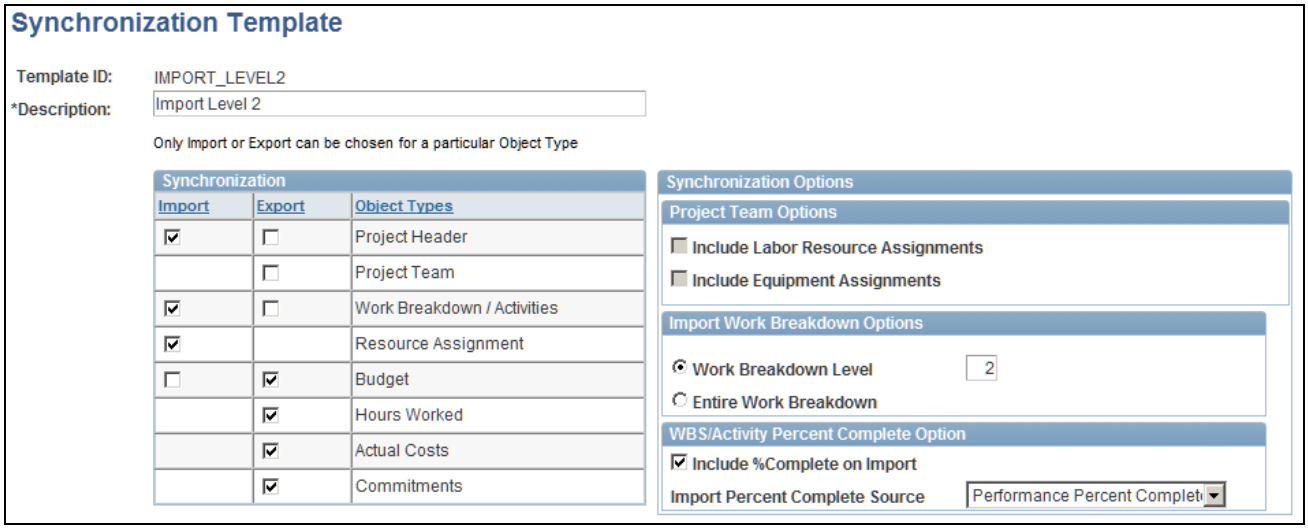
Setting up Synchronization Templates

Access the Synchronization Template page (Program Management, Primavera Integration, Synchronization Template):



Synchronization Template page

Synchronization

Import or **Export**

Select one direction for each synchronization element (object type). You cannot select Import and Export for the same synchronization element.

- *Import:* select to indicate that you want to import the objects from Primavera P6 to Program Management.
- *Export:* select to indicate that you want to export from Program Management to Primavera P6.

If no check box is selected for the synchronization element, then it is not synchronized, regardless of what is selected on the Synchronize Existing Projects page.

Project Header

Select to import, or export, project header information.

When the Import check box is selected, the Project Synchronization process (PGM_SYNC_PRJ) calls the Third-Party Project and Activity Loader process (PC_INTF_GEN) process.

Project Team

Select to export project team information from PeopleSoft to Primavera P6. You cannot import project team data.

When the Export check box is selected, the Project Team Options are enabled in the Synchronization Options group box.

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Work Breakdown / Activities Select to import, or export, the work breakdown structure (WBS) at the activity level.

When the Import check box is selected, the Project Synchronization process (PGM_SYNC_PRJ) calls the Third-Party Project and Activity Loader process (PC_INTF_GEN) process.

Resource Assignment Select to import resource assignments. Resource assignments can only be imported from Primavera P6 to PeopleSoft.

When the Import check box is selected, the Project Synchronization process (PGM_SYNC_PRJ) calls the Third-Party Project and Activity Loader process (PC_INTF_GEN) process.

Budget Select to import or export budget data.

When the Import check box is selected, the Project Synchronization process (PGM_SYNC_PRJ) calls the Project Transaction Loader process (PC_INTFEDIT), and if budget data exists, the Project Transaction Loader process calls the Project Budget Loader process (PC_BUDGET_IN).

Hours Worked Select to export hours worked. Hours worked can only be exported from PeopleSoft to Primavera P6.

Actual Costs Select to export actual costs. Actual costs can only be exported from PeopleSoft to Primavera P6.

For more information about the Level to Export Actual Cost field:.

See Chapter 22, "Integrating with Primavera P6," Setting Up Primavera P6 Integration Options for Business Units and Project Costing Control Data, page 421.

Commitments Select to export commitment data.

Synchronization Options

If you select the Export check box for the Project Team element, the Project Team Options are enabled. At least one of these options must be selected to export project teams:

Include Labor Resource Assignments Select to indicate that the export process should include labor resources.

If this check box is not selected, the system does not include labor resources when project team is exported.

Include Equipment Assignments Select to indicate that the export process should include equipment resources.

If this check box is not selected, the system does not include equipment resources when project team is exported.

If you select the Import check box for the Work Breakdown / Activities synchronization element, the Import Work Breakdown Options section is enabled:

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Work Breakdown Level Select to indicate that you want to specify the WBS level and enter the level to the right of the radio button. If level 4 is entered, then the WBS structure from levels 1, 2, 3, and 4 are sent to PeopleSoft.

Note. Only WBS items, not activities, are imported from Primavera P6.

Entire Work Breakdown Select to indicate that you want to import the entire WBS, including the detailed activities, from Primavera P6 to Program Management.

Note. Activity details are mapped one-to-one between PeopleSoft and Primavera P6.

Include Percent Complete on Activity Import Select to indicate that you will determine the field in Primavera P6 from which to pull the percent complete information. When this option is selected, the Import Percent Complete Source can be selected.

If you select the Import check box for the Work Breakdown/Activities element, this check box appears.

Import Percent Complete Source Select an option that determines the field in Primavera P6 from which to pull the percent complete information. Options are: Performance Percent Complete, Duration Percent Complete, and Unit Percent Complete.

If you select the Include Percent Complete on Activity Import check box, and the percent complete calculation method has been set to manual on the Project Definition – Project Costing Definition page, then the percent complete is imported from the field selected in this field.

If you select the Export check box for the Work Breakdown / Activities synchronization element, this field appears in the WBS/Activity Percent Complete Option section of the Synchronization Options group box:

Include Percent Complete on Activity Export Select to indicate that when activities are exported, the percent complete in PeopleSoft is sent to the Physical Percent Complete field in Primavera P6. This value is only sent for activities, not for the WBS.

If you select the Export check box for the Work Breakdown/Activities element, this check box appears.

Setting Up Primavera P6 Integration Options for Business Units and Project Costing Control Data

This section discusses how to:

- Set up Primavera P6 integration options for a Project Costing business unit.
- Define specifications for an Expenses business unit.

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Pages Used to Set Up Primavera P6 Integration Options for Business Units and Project Costing Control Data

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Costing Options - Primavera	PC_P6_PRMVR_OPTNS	Set Up Financial/Supply Chain, Business Unit Related, Project Costing, Project Costing Options, Primavera	Set Up Primavera P6 integration options for a Project Costing business unit.
Expenses Definition – Business Unit 2	BUS_UNIT_TBL_EX2	Set Up Financial/Supply Chain, Business Unit Related, Expenses, Expenses Definition, Business Unit 2	Define specifications for an Expenses business unit. For more information about defining specifications for an Expenses business unit: See Chapter 22, "Integrating with Primavera P6," Setting Up Primavera P6 Integration Options for Business Units and Project Costing Control Data, page 421. See *PeopleSoft Expenses 9.1 PeopleBook*, "Defining Your Operational Structure for PeopleSoft Expenses," Defining Specifications for a Business Unit.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Transaction Identifier	PC_TRANS_IDENTIFY	Set Up Financials/Supply Chain, Product Related, Project Costing, Transaction Options, Transaction Identifiers	If you plan to export actual costs to Primavera P6, then use this page to define transaction identifiers. Transaction identifiers identify valid combinations of Source Type, Category, and Subcategory fields. These three fields define a portion of Project Costing ChartFields. See PeopleSoft Project Costing 9.1 PeopleBook, Setting Up PeopleSoft Project Costing Control Data, Setting Up Transaction-Related Information, Defining Transaction Identifiers See *PeopleSoft Project Costing 9.1 PeopleBook*, "Setting Up PeopleSoft Project Costing Control Data," Defining Transaction Identifiers.

Setting Up Primavera P6 Integration Options for a Project Costing Business Unit

Access the Project Costing Options – Primavera page (Set Up Financial/Supply Chain, Business Unit Related, Project Costing, Project Costing Options, Primavera).

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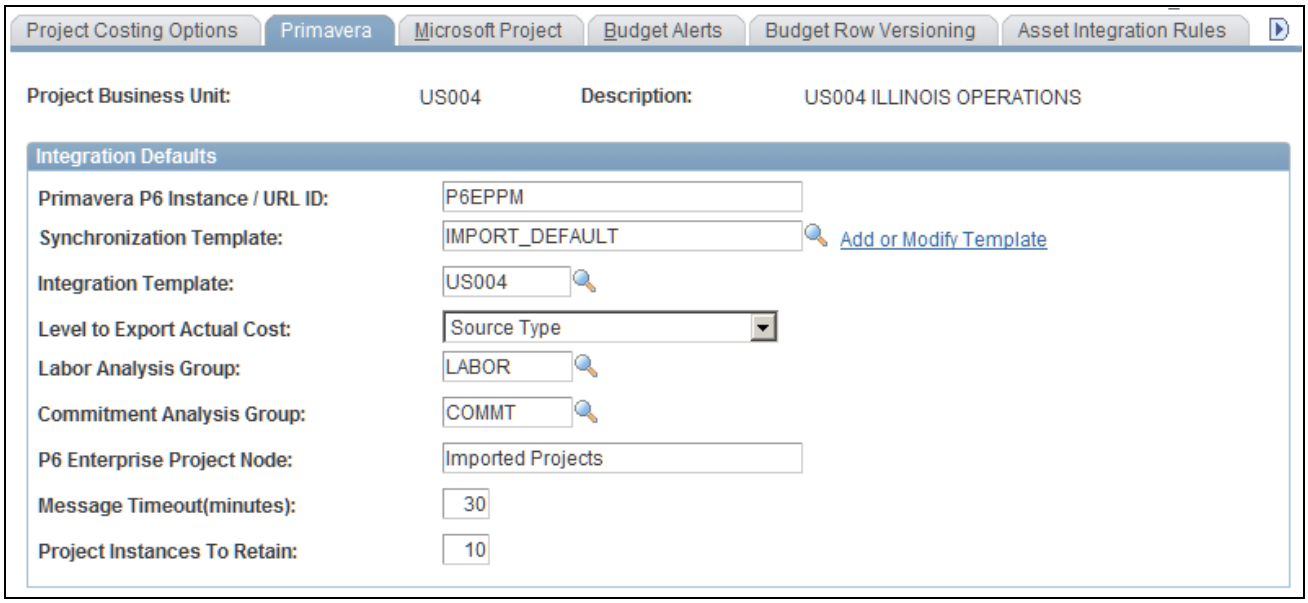

Project Costing Options – Primavera page

Use this page to specify options for Primavera P6 integration with Program Management for a business unit.

Primavera P6 Instance / URL ID Enter the name of the Primavera instance to which this business unit will integrate project and master data. The delivered integration supports integration with one Primavera P6 instance, P6EPPM, which is the default value. A PeopleSoft Project Costing business unit can integrate with only one Primavera P6 instance. Multiple Project Costing business units can integrate with the same value (Primavera P6 instance) in this field as long as each business unit uses the same currency.

If you only plan to integrate with one Primavera P6 instance, then use the default, P6EPPM. If your organization requires multiple Primavera P6 instances, additional setup is required.

When a value is entered in this field, all other fields on this page are required.

See Implementing PeopleSoft Program Management 9.1 with Primavera P6 Enterprise Project Portfolio Management R8.1 On My Oracle Support (MOS) (support.oracle.com) Note 1361217.1

Synchronization Template Select a synchronization template that is used as the default for all projects created for the business unit.

Add or Modify Template Click to access the Synchronization Template page.

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Integration Template

Select an integration template that identifies the business units to which the project can integrate.

When a project is imported (and created) in Program Management from Primavera P6, the project is created with the integration template that is specified on the User Preferences page for Project Costing.

If an integration template is not specified on the User Preferences page, then the value in this field is used as a default when projects are created from Primavera P6.

Level to Export Actual Cost

Select the level in which actual costs are to be summarized when exporting data to Primavera P6. Options are:

- *Total:* Actual costs are sent as a total summed amount for each activity and at the project level. The project level is equal to all of the activity costs for the project. Actual cost data is not broken down when it is sent to the Project Total Actual Cost field in Primavera P6.
- *Source Type:* Actual costs are broken down by transaction identifiers for each activity and at the project level. The project level is equal to all of the activity costs for the project. In addition, the actual costs are sent as a total summed amount for each activity and at the project level, as if the Total option was selected with the Source Type option.

When exporting actual costs from PeopleSoft, the transaction identifier determines the combination of: Source Type, Category, and Sub-Category to use. Transaction identifiers are defined in PeopleSoft to provide valid combinations of Source Type, Category, and Sub-Category that map to Labor, Material, Non-Labor, and Contract Labor cost categories in Primavera P6. These maps are maintained in the TRANSACTION_IDENTIFIER_CODE DVM.

Labor Analysis Group

Select the analysis group that is used to calculate labor hours.

Commitment Analysis Group

Select the analysis group that is used when sending the sum of commitments to Primavera P6.

P6 Enterprise Project Node

Enter the node of the Primavera Enterprise Project Structure (EPS) that identifies where new projects will initially reside. This node must be created in Primavera P6 before projects can be synchronized with Primavera P6.

After the project is created in Primavera P6, it can be moved to another node on the Primavera EPS.

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Message Timeout (minutes) Enter the amount of time (in minutes) that the system should use when waiting for a message before considering the message to be timed-out.

The system is dependent on receiving responses to messages prior to processing the set for performance purposes. A hanging message can prevent the completion of the remaining run control. If PeopleSoft does not receive a response to a message, then all other messages that are received in the same run control are not processed.

Use caution when entering a high number. You should set the timeout larger than the longest running time between timestamp events. A high number of minutes can delay the system from cleaning up run controls that have even one message that is hanging or is taking time to respond.

Project Instances To Retain Enter the number of instances of a project that you want to retain in the project log tables on the PeopleSoft system.

Each time that data for a given project is imported, it is counted as one instance regardless of which objects are being imported for that project. For example, if you are importing the project header, activities, and budget for project P001, the system will add 1 to the instance count for project P001. If the next time you are only importing the project header for project P001, the system will add 1 to the instance count for project P001.

Therefore, if the Project Instances To Retain value is 10, then for a given project, the values from the last 10 synchronization updates are retained. When the 11th synchronization from Primavera P6 is created, the system saves the values for the 11th update and deletes the values from the first update.

Defining Specifications for an Expenses Business Unit

Access the Expenses Definition – Business Unit 2 page (Set Up Financial/Supply Chain, Business Unit Related, Expenses, Expenses Definition, Business Unit 2):

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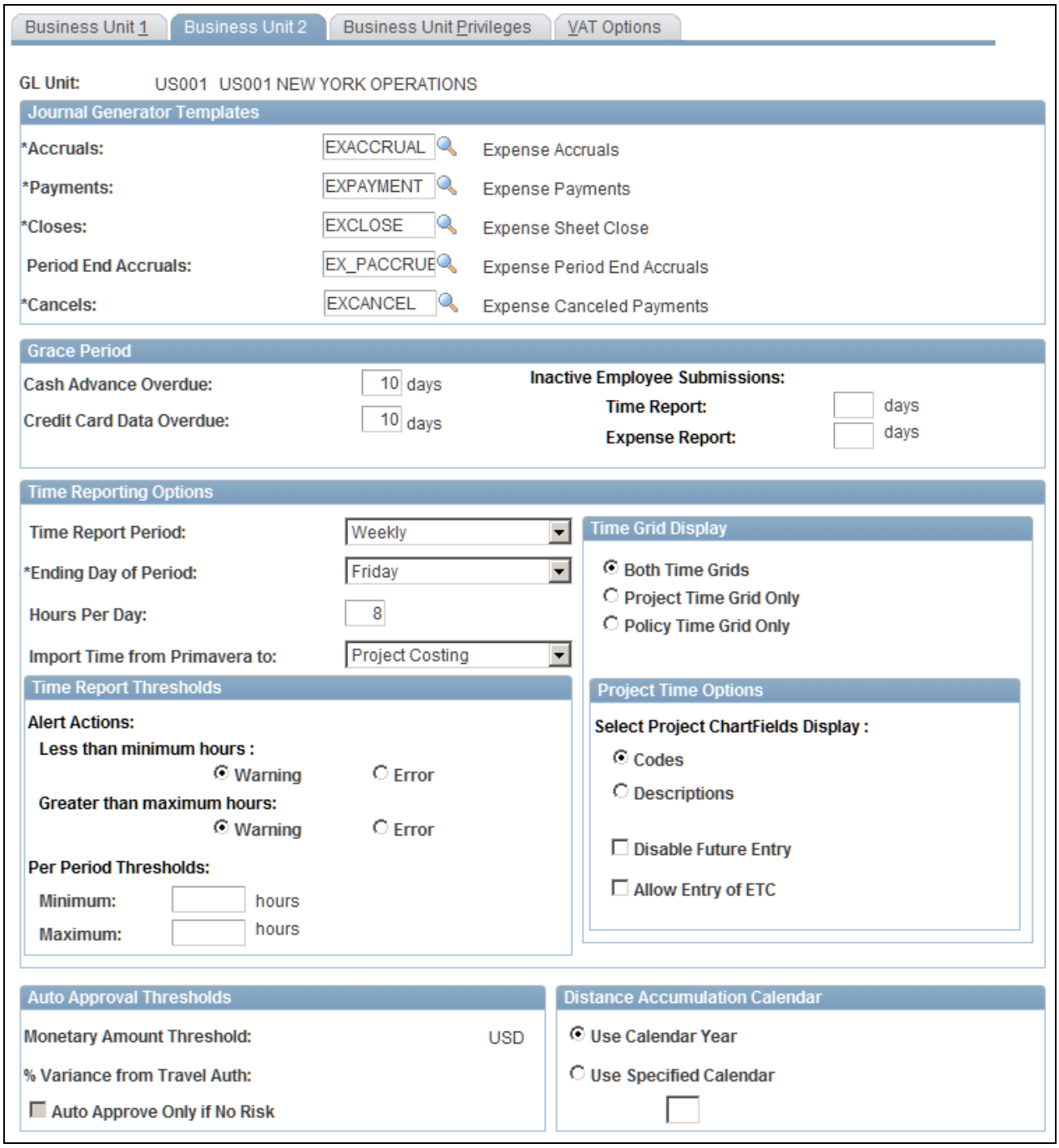

Expenses Definition – Business Unit 2 page (partial page shot)

Use this page to select the destination for Primavera P6 timesheet data.

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Time Reporting Options

Import Time from Primavera to

Select *Expenses* or *Project Costing.*

When importing timesheet data from Primavera P6 to PeopleSoft, this field determines whether the data is imported into PeopleSoft Expenses or Project Costing.

This field is not available if Program Management is not installed.

For additional information about this page:

See *PeopleSoft Expenses 9.1 PeopleBook,* "Defining Your Operational Structure for PeopleSoft Expenses," Defining Specifications for a Business Unit.

Setting Up Primavera P6 Integration Options for a Project

This section discusses how to set up Primavera P6 integration options for a project.

Page Used to Set up Primavera P6 Integration Options for a Project

Page Name	*Definition Name*	*Navigation*	*Usage*
General Information - Primavera	PROJECT_P6_OPTN	Project Costing, Project Definitions, General Information, Primavera	Use this page to indicate if a project should be included in the integration process with Primavera P6.

Setting Up Primavera P6 Integration Options for a Project

Access the General Information – Primavera page (Project Costing, Project Definitions, General Information, Primavera).

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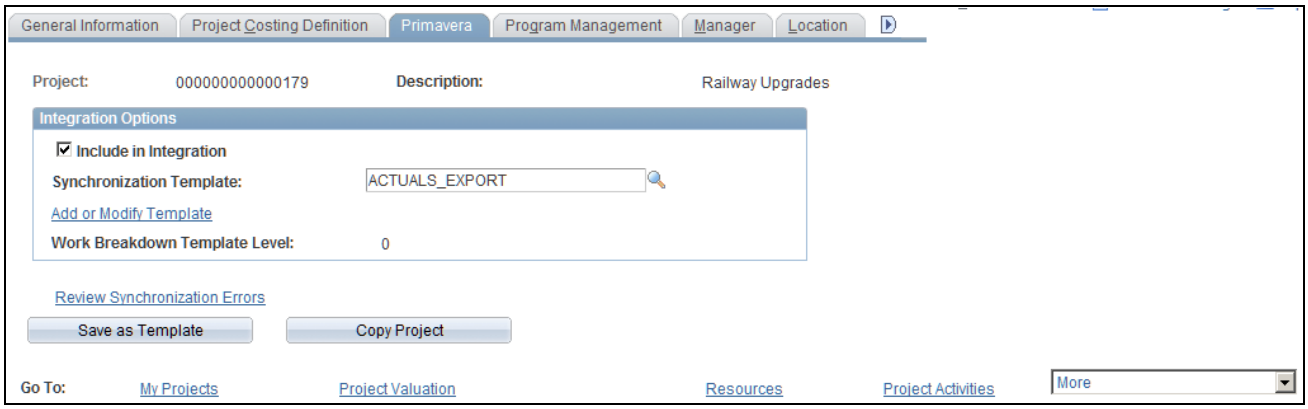

General Information – Primavera

Include In Integration Select to indicate that the project should be included in the synchronization process with Primavera P6. If selected and the project meets the selection criteria on the run control page for the PGM_SYNC_PRJ process, then this project will be exported from PeopleSoft to Primavera P6 the next time the Project Synchronization process runs.

If not selected, the project will not be synchronized with Primavera P6 regardless of whether the project meets the selection criteria on the Synchronize Project Data run control page.

Synchronization Template Select a synchronization template. When adding a project, the system displays the synchronization template that is specified on the Project Costing Options page for the business unit. The business unit default can be changed in this field.

Add or Modify Template Click to access the Synchronization Template component. Use this link to add a new synchronization template or modify an existing synchronization template.

Work Breakdown Template Level Displays the WBS level after a project has been imported from Primavera P6. If the WBS level is zero, then the entire WBS was integrated, or the project has not been integrated.

Review Synchronization Errors Click to access the Project Data Sync Log page.

Synchronizing Data between PeopleSoft and Primavera P6

This section provides an overview of the synchronization process between PeopleSoft and Primavera P6, and discusses how to:

- Synchronize master data.
- Synchronize net new projects.
- Synchronize existing projects.

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- Import timesheets from Primavera P6.
- Export data from the Project Activities page.
- Review resource information.

Understanding the Synchronization Process between PeopleSoft and Primavera P6

This section discusses:

- Master data synchronization.
- Project data synchronization.
- Importing net new data from Primavera P6 to PeopleSoft.
- Importing project, activity, and resource data using the Third-Party Loader process.
- Importing budget data using the Third-Party Loader process.

Master Data Synchronization

The Synchronize Master Data process (PGM_SYNC_MST) is used to export master data from PeopleSoft to Primavera P6. Master data includes labor resources, labor rates, materials, and equipment assets.

When master data is exported from PeopleSoft to Primavera P6 and a message failure occurs, all objects within the message are rejected. If any master data object in a message fails, then the entire batch for that message is rejected. In both cases, a message is sent to the synchronization log.

Project Data Synchronization

The Project Synchronization process (PGM_SYNC_PRJ) is used to import and export project data between PeopleSoft Program Management and Primavera P6. This process handles net new project and existing project data.

The Project Synchronization process runs import and export streams in parallel:

- The Project Synchronization process (PGM_SYNC_PRJ) handles the import stream from Primavera P6 to PeopleSoft.
- The Export process (PGM_PROJ_EXP) handles the export stream from PeopleSoft to Primavera P6.

The Project Synchronization process transforms data using four libraries:

- P6_PROJ_LIB, which handles the import and export of project header data.

  When importing project header data, it is imported to the INTFC_PROJ_GEN table.

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- P6_WBS_LIB, which handles the import and export of WBS, activities, hours worked, actual costs, commitments, and budget data.
    - When importing, WBS and activity data is imported to the INTFC_ACT_GEN table.
    - When importing budget data, it is imported into INTFC_PROJ_RES.
- P6_TSKRS_LIB, which handles the import of resource assignment data in the INTFC_TEAM_GEN table.
- P6_TEAM_LIB, which handles the export of project and WBS team data.

When project data is synchronized between PeopleSoft and Primavera P6 and a message failure occurs, all objects within the message are rejected. If any project data object in a message fails, then the entire batch for that message is rejected. In both cases, a message is sent to the synchronization log.

Note. If large volumes of data are being synchronized, it is recommended that you divide your data and run multiple project synchronization jobs in parallel. This will improve performance with large jobs.

Importing Net New Data from Primavera P6 to PeopleSoft

These steps are followed when importing net new projects that do not exist in PeopleSoft:

1. Within Primavera P6, projects must be associated with a PeopleSoft business unit prior to importing the project from Primavera P6 to PeopleSoft.
2. In Primavera P6, when the project is ready to be imported from Primavera P6 to PeopleSoft, the user must set the ERP Sync Status field to *Ready*.
3. In PeopleSoft, from the Synchronize Net New Project page, select the Import Projects from Primavera that do not yet exist in PeopleSoft check box. PeopleSoft sends the business unit and WBS level to Primavera P6.
4. The PeopleSoft system imports all project data that exists in Primavera P6 to the WBS level that is specified on the synchronization template for the business unit. The project name that is entered in Primavera P6 is sent to PeopleSoft.
5. The PeopleSoft system verifies that the project has not been previously sent to the PeopleSoft system by checking the cross reference table. If the project was previously sent to PeopleSoft, then the system creates an error in the synchronization log.
6. The PeopleSoft system automatically assigns a PeopleSoft project ID regardless of the project ID in Primavera P6. The wbs_name field of the project is retained from Primavera P6 and placed in the description field in PeopleSoft.
7. The synchronization template that is defined for the PeopleSoft business unit is associated with the project. This can be changed within PeopleSoft, after the synchronization process completes by using the Project Definitions – Primavera page.
8. The PeopleSoft system sends Primavera P6 an updated status indicating that the synchronization process was successful. The ERP Sync Status field is updated from *Ready* to *Synced* for the project in Primavera P6.

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9. The project is automatically imported into the PeopleSoft system. The project is included in future synchronizations if the Include in Integration check box remains selected on the Project Definitions – Primavera page for the project.

Note. A maximum of 999 new projects can be imported at a time.

Importing Project, Activity, and Resource Data Using the Third-Party Loader Process

The Project Synchronization process (PGM_SYNC_PRJ) calls the Project and Activity Loader process (PC_INTF_GEN). The Project and Activity Loader process loads project, activity, and resource data from project, activity, and resource staging tables.

This diagram illustrates that new and existing data is staged in three staging tables prior to updating multiple project and synchronization tables:

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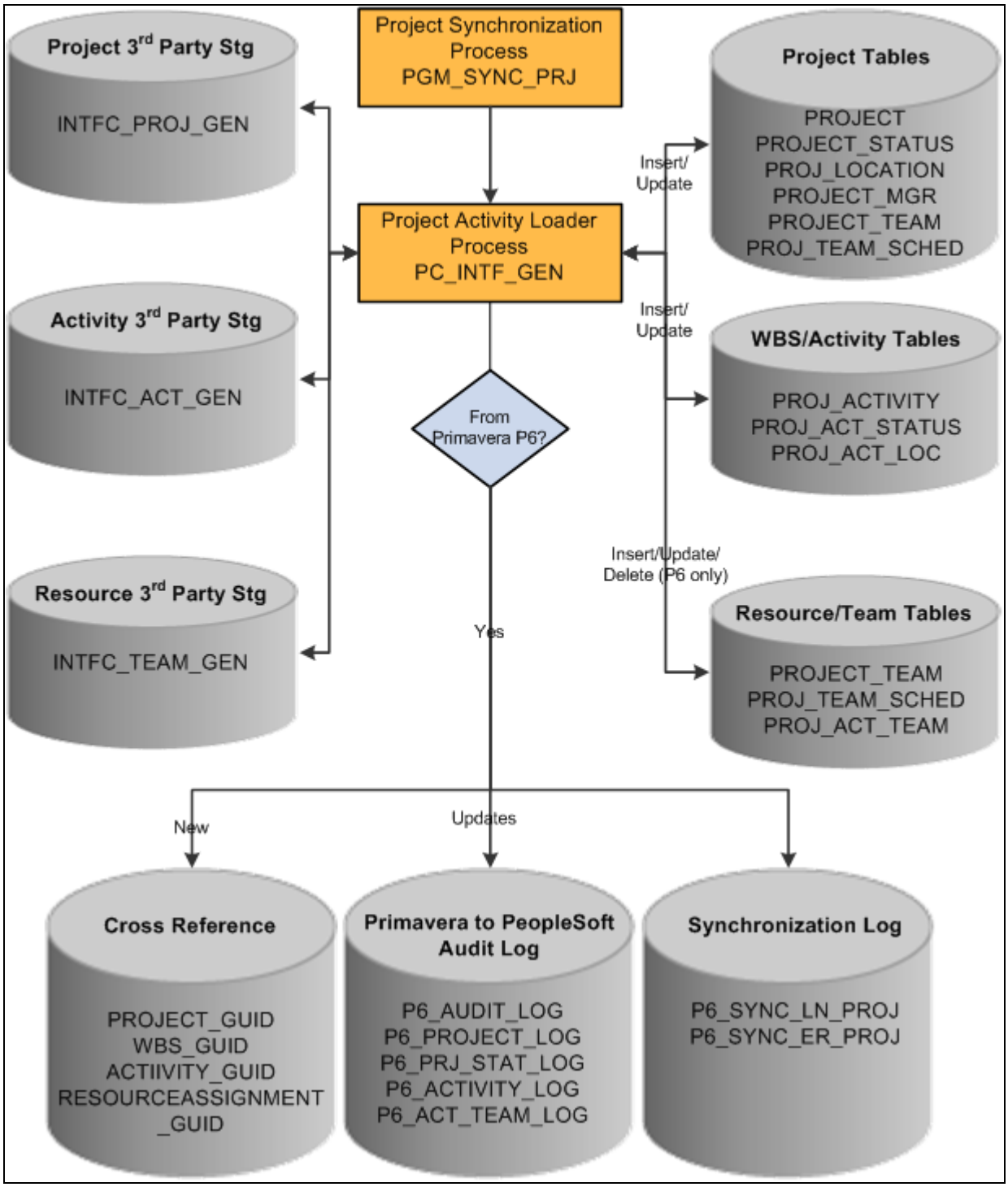

Third Party Project Activity Loader process flow

The steps to this process are:

1. The Project Synchronization process (PGM_SYNC_PRJ) updates three staging tables (INTFC_PROJ_GEN, INTFC_ACT_GEN, and INTFC_TEAM_GEN).

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2. The Project Synchronization process calls the Project Activity Loader process (PC_INTF_GEN), which pulls data from the three staging tables and updates multiple Project Costing tables for projects, activities, and resources.

3. If the data is from Primavera P6:

    - New project, activity, and resource data is written to cross-reference tables in PeopleSoft.
    - Updated project, activity, and resource data is updated in the audit log tables.
    - The audit logs capture data that has been changed. You can use these tables to refer to a previous value of a field. The Project Instances to Retain field on the Project Costing Options – Primavera page determines the number of instances to retain. When data is imported from the Third-Party Loader processes, the previous record is saved in the audit log tables.
    - Updated project, activity, and resource synchronization status in the synchronization logs.

Importing Budget Data Using the Third-Party Loader Process

The Budget Loader process (PC_BUDGET_IN) is also called from the Project Synchronization process (PGM_SYNC_PRJ). It is used to load budget data from Primavera P6 to PeopleSoft Project Costing tables.

This diagram illustrates that new and existing transaction data is staged prior to updating the project transaction table, budget tables, and the synchronization log table:

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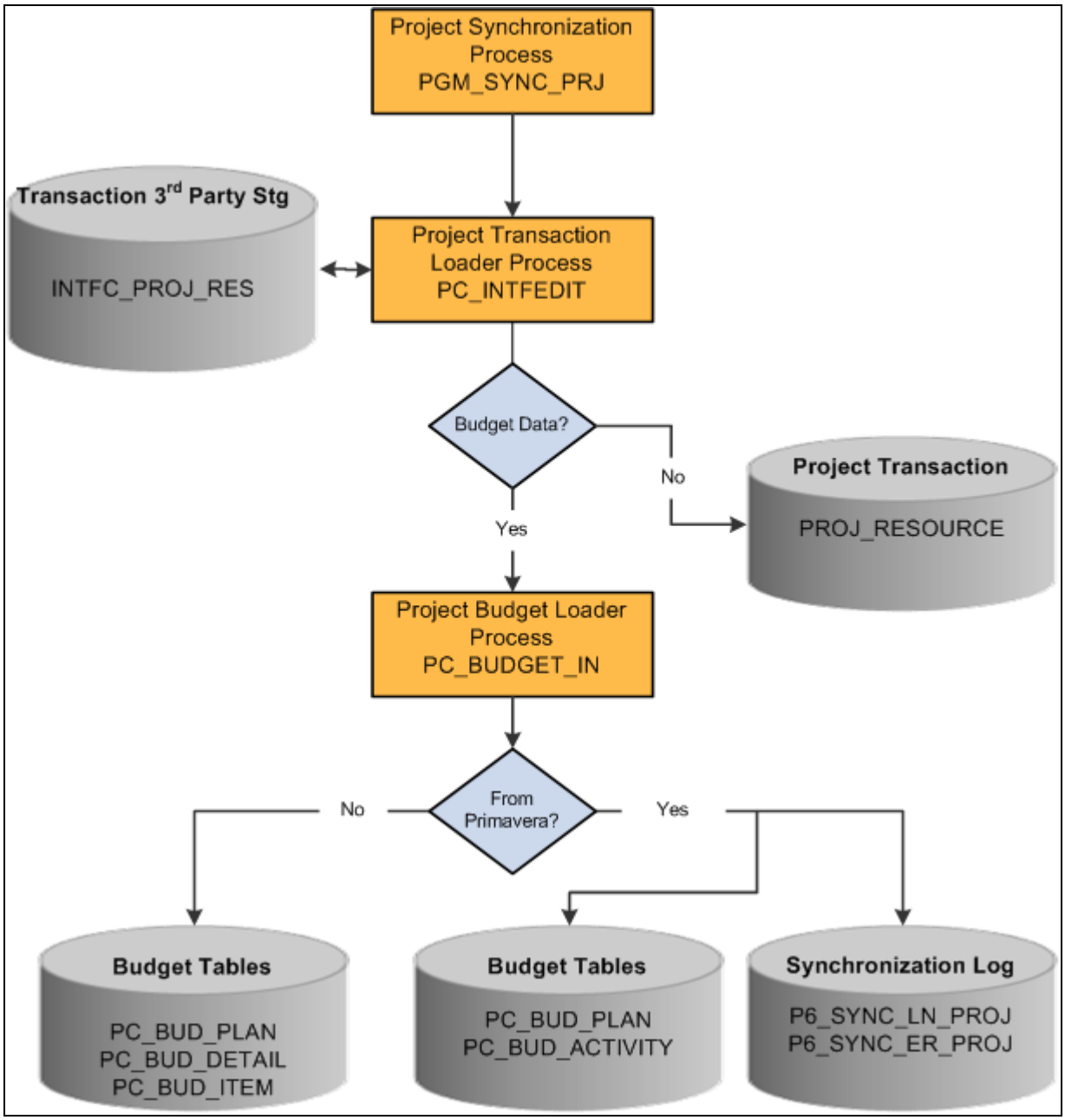

Third Party Budget Loader process flow

The steps to this process are:

1. The Project Synchronization process (PGM_SYNC_PRJ) updates the INTFC_PROJ_RES staging table.
2. The Project Synchronization process (PGM_SYNC_PRJ) calls the Project Transaction Loader process (PC_INTFEDIT).
3. If budget data exists in the INTFC_PROJ_RES staging table, then the Project Budget Loader process (PC_BUDGET_IN) is called.

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4. If the data is from Primavera P6:

    a. Data is pulled from the INTFC_PROJ_RES staging table and creates new budget versions in Project Costing.

    b. Updated budget synchronization status in the synchronization logs

Pages Used to Synchronize Data between PeopleSoft and Primavera P6

Page Name	*Definition Name*	*Navigation*	*Usage*
Synchronize Master Data	RUN_PGM_P6_MST	Program Management, Primavera Integration, Synchronize Master Data	Synchronize master data between Program Management and Primavera P6.
Synchronize Net New Projects	RUN_PGM_P6_PROJ	Program Management, Primavera Integration, Synchronize Net New Projects	Synchronize new project data between Program Management and Primavera P6.
Synchronize Existing Projects	RUN_PGM_P6_PROJ	Program Management, Primavera Integration, Synchronize Existing Project Data	Synchronize existing project data between Program Management and Primavera P6.
Import Time from Primavera	RUN_PGM_P6_TIME	Program Management, Primavera Integration, Import Time from Primavera	Import timesheets from Primavera P6.
Project Activities	PC_PROJ_ACTIVITY	Project Costing, Activity Definitions, Project Activities	Synchronize data from the Project Activities page. You can also add activities to a project and view all activities assigned to a project. For additional information about the Project Activities page: See *PeopleSoft Project Costing 9.1 PeopleBook*, "Creating and Maintaining Activities," Adding Project Activity Schedules.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Review Resource Details	INTFC_TEAM_GEN	Project Costing, Third Party Integration, Review Resource Details	Review resource information on the staging table. For additional information about reviewing resource information: See *PeopleSoft Project Costing 9.1 PeopleBook*, "Integrating with Third-Party Applications," Reviewing and Modifying Resource Interface Data.

Synchronizing Master Data

Access the Synchronize Master Data page (Program Management, Primavera Integration, Synchronize Master Data).

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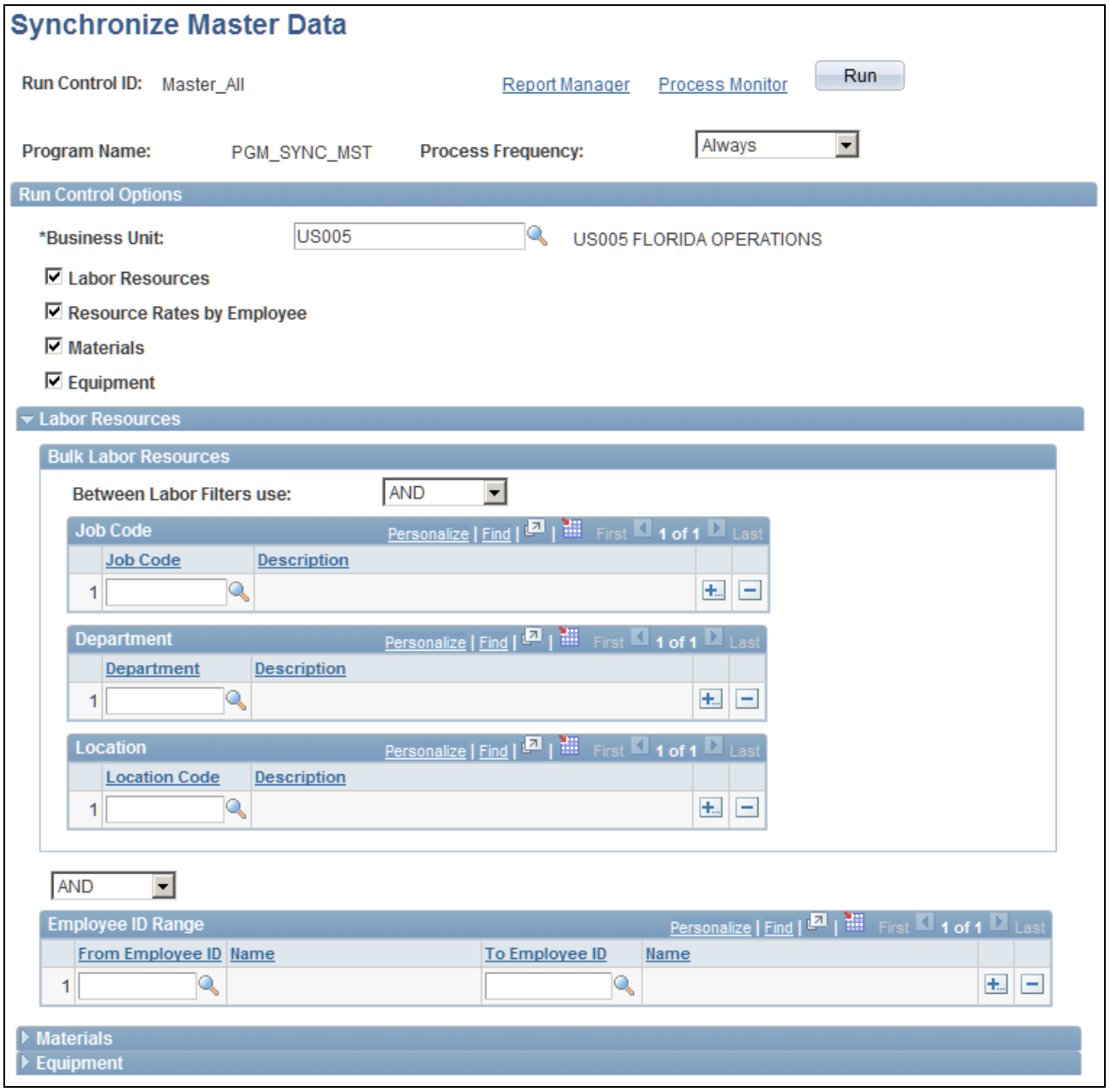

Synchronize Master Data page (Labor Resources section expanded)

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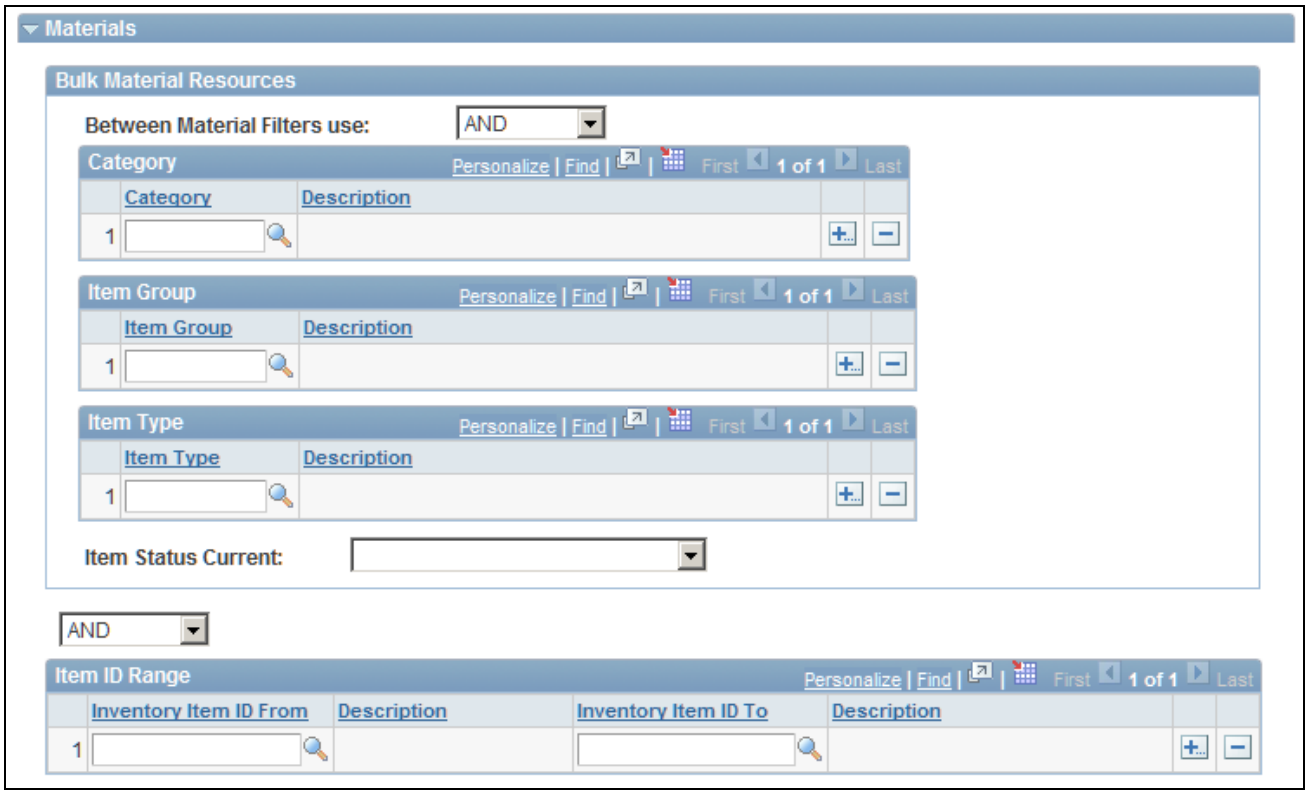

Synchronize Master Data page (Materials section expanded)

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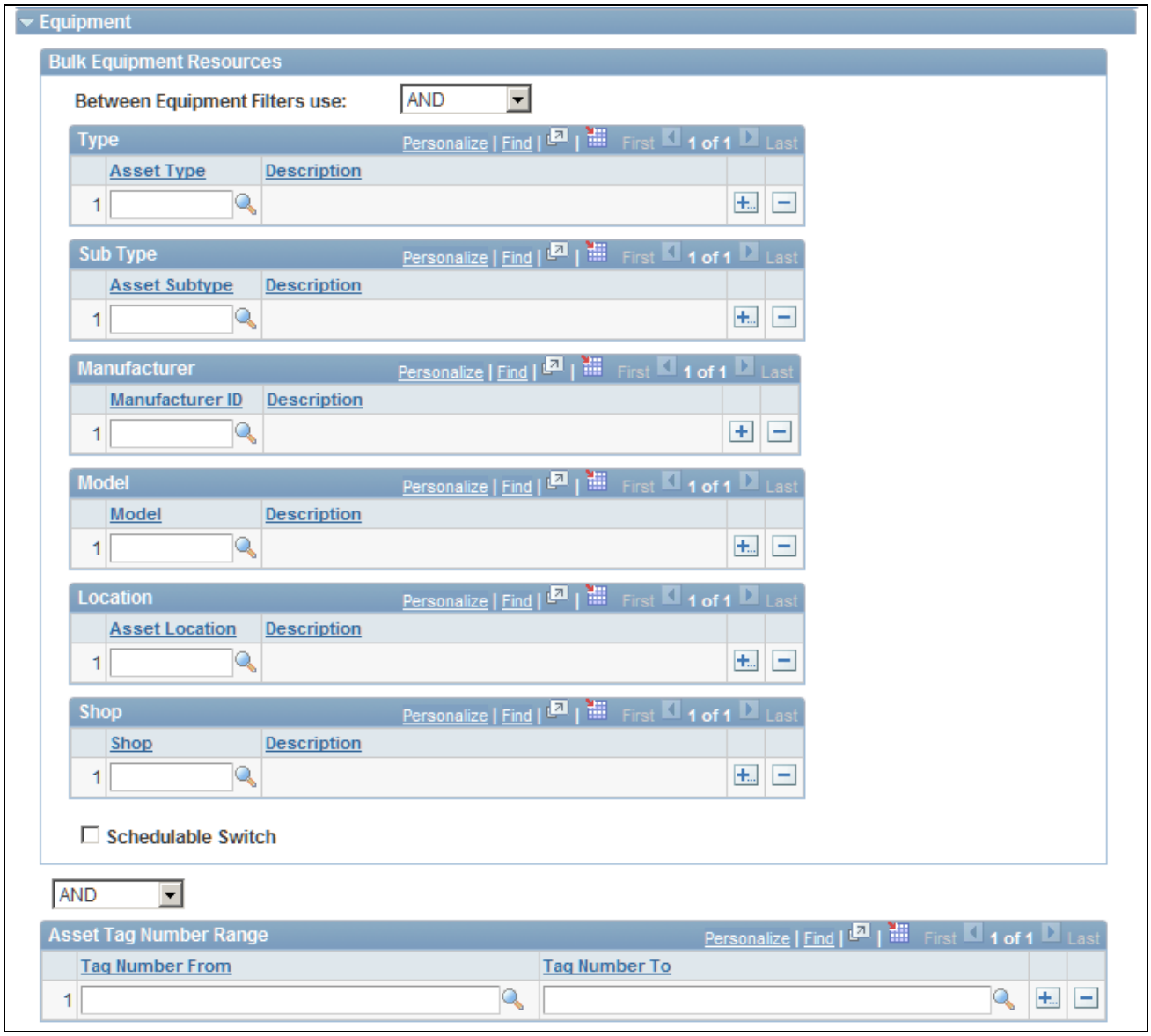

Synchronize Master Data page (Equipment section expanded)

Use this page to run the Synchronize Master Data process (PGM_SYNC_MST).

Run Control Options

Use this section to enter the Program Management business unit for which you want to send master data from PeopleSoft to Primavera P6.

Use the check boxes below the Business Unit field to indicate the master data to which you want to synchronize. When you select Labor Resource, Materials, or Equipment, you can use the specific sections to specify details about the data to be synchronized.

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Labor Resources Select the check box to indicate that all labor resources are to be synchronized. Selecting this check box also opens the Labor Resources section.

All labor resources are sent to Primavera P6 unless you use the filters in the Labor Resources section. The Labor Resources section enables you to filter the labor resources that are sent.

Resource Rates by Employee Select to indicate that the resource rates for each labor resource is exported to Primavera P6.

Labor resources can be synchronized with resource rates if the Labor Resources check box is selected.

If Resource Rates by Employee is selected and Labor Resources is deselected, then only rates for labor resources that were previously synchronized will be sent to Primavera P6. The system will send an application error for labor resources that have not been previously synchronized, and will not be exported to Primavera P6.

Materials Select the check box to indicate that all materials are to be synchronized. Selecting the check box also opens the Materials section.

All materials are sent to Primavera P6 unless you use the filters in the Materials section. The Materials section enables you to filter the materials that are sent.

Equipment Select the check box to indicate that all equipment is to be synchronized. Selecting the check box also opens the Equipment section. Only assets that have a type and subtype defined in PeopleSoft are synchronized.

All equipment assets are sent to Primavera P6 unless you use the filters in the Equipment section. The Equipment section enables you to filter the equipment (assets) that are sent.

Labor Resources

Between Labor Resource Filters use Select *AND* or *OR* to determine the relationship between the values in this section.

Job Code Select one to 20 job codes that you want to synchronize. All resources that are associated with the job codes are synchronized. If a resource is multi-job related, then the resource is included in the synchronization if either job matches the job code specified in this field.

Department Select one to 20 departments that you want to synchronize. All resources within that department are synchronized.

Location Select one to 20 locations that you want to synchronize. The system uses each employee's location from the job table. All resources that have that location are synchronized.

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(AND/OR drop down box)	The drop down box that is between the Bulk Labor Resources section and the Employee ID Range section determines if the system creates an *AND* or an *OR* relationship between the two sections. • *AND:* indicates that all values in the Employee ID Range section must also be in the Bulk Labor Resources section, and only the bulk resources are sent to Primavera P6. • *OR:* indicates that any resource selected in the bulk section is sent as well as any employee ID selected in the Employee ID Range section.
Employee ID Range (section)	Select a range of employee IDs to synchronize.

Materials

Between Material Resource Filters use	Select *AND* or *OR* to determine the relationship between the values in this section.
Category	Select one to 20 categories that you want to synchronize. All materials within these categories are synchronized.
Item Group	Select one to 20 item groups that you want to synchronize. All materials within these item groups are synchronized.
Item Type	Select one to 20 item types that you want to synchronize. All materials within these item types are synchronized.
Item Status Current	Select a status that indicates the status of the materials that you want to synchronize.
(AND/OR drop down box)	The drop down box that is between the Bulk Material Resources section and the Item ID Range section determines if the system creates an *AND* or an *OR* relationship between the two sections. • *AND:* indicates that all values in the Item ID Range section must also be in the Select Bulk Materials section, and only the bulk materials are sent to Primavera P6. • *OR:* indicates that any material selected in the bulk section is sent as well as any item ID selected in the Item ID Range section.
Item ID Range (section)	Select a range of item IDs to synchronize.

Equipment

Between Material Resource Filters use	Select *AND* or *OR* to determine the relationship between the values in this section.

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Type	Select one to 20 equipment asset types that you want to synchronize. All equipment with these types are synchronized.
SubType	Select one to 20 sub-types within the types selected in the Type section that you want to synchronize. All equipment with these sub-types are synchronized.
Manufacturer	Select one to 20 manufacturers that you want to synchronize. All equipment with these manufacturers are synchronized.
Model	Select one to 20 models that you want to synchronize. All equipment with these models are synchronized.
Location	Select one to 20 locations that you want to synchronize. All equipment assets with these locations are synchronized.
Shop	Select one to 20 shops that you want to synchronize. All equipment assets with these shops are synchronized.
Schedulable Switch	Select to indicate that only schedulable equipment is synchronized.
(AND/OR drop down box)	The drop down box that is between the Bulk Equipment Resources section and the Asset Tag Number Range section determines if the system creates an *AND* or an *OR* relationship between the two sections. • *AND:* indicates that all values in the Asset Tag Number Range section must also be in the Select Bulk Equipment section, and only the bulk equipment is sent to Primavera P6. • *OR:* indicates that any material selected in the bulk section is sent as well as any asset tag number selected in the Asset Tag Number Range section.
Asset Tag Number Range (section)	Select a range of asset tag numbers to synchronize.

Synchronizing Net New Projects

Access the Synchronize Net New Projects page (Program Management, Primavera Integration, Synchronize Net New Projects).

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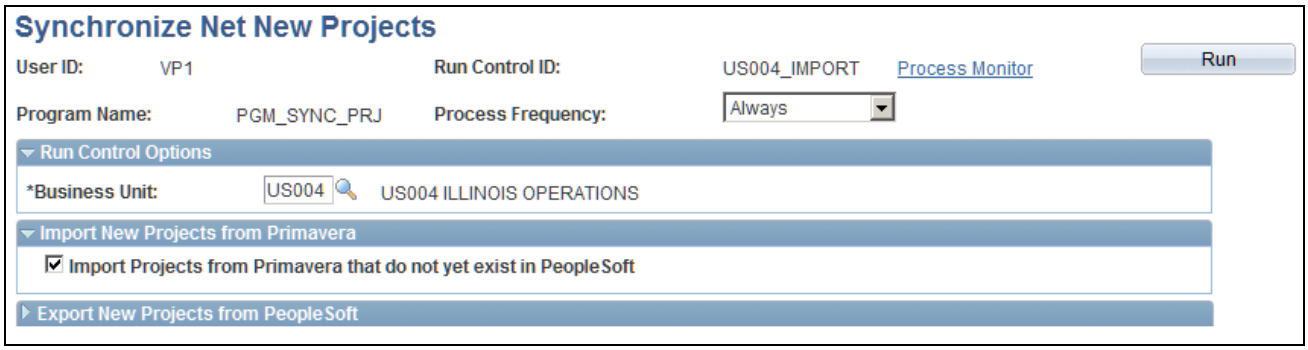

Synchronize Net New Projects page (Export New Projects from PeopleSoft section collapsed)

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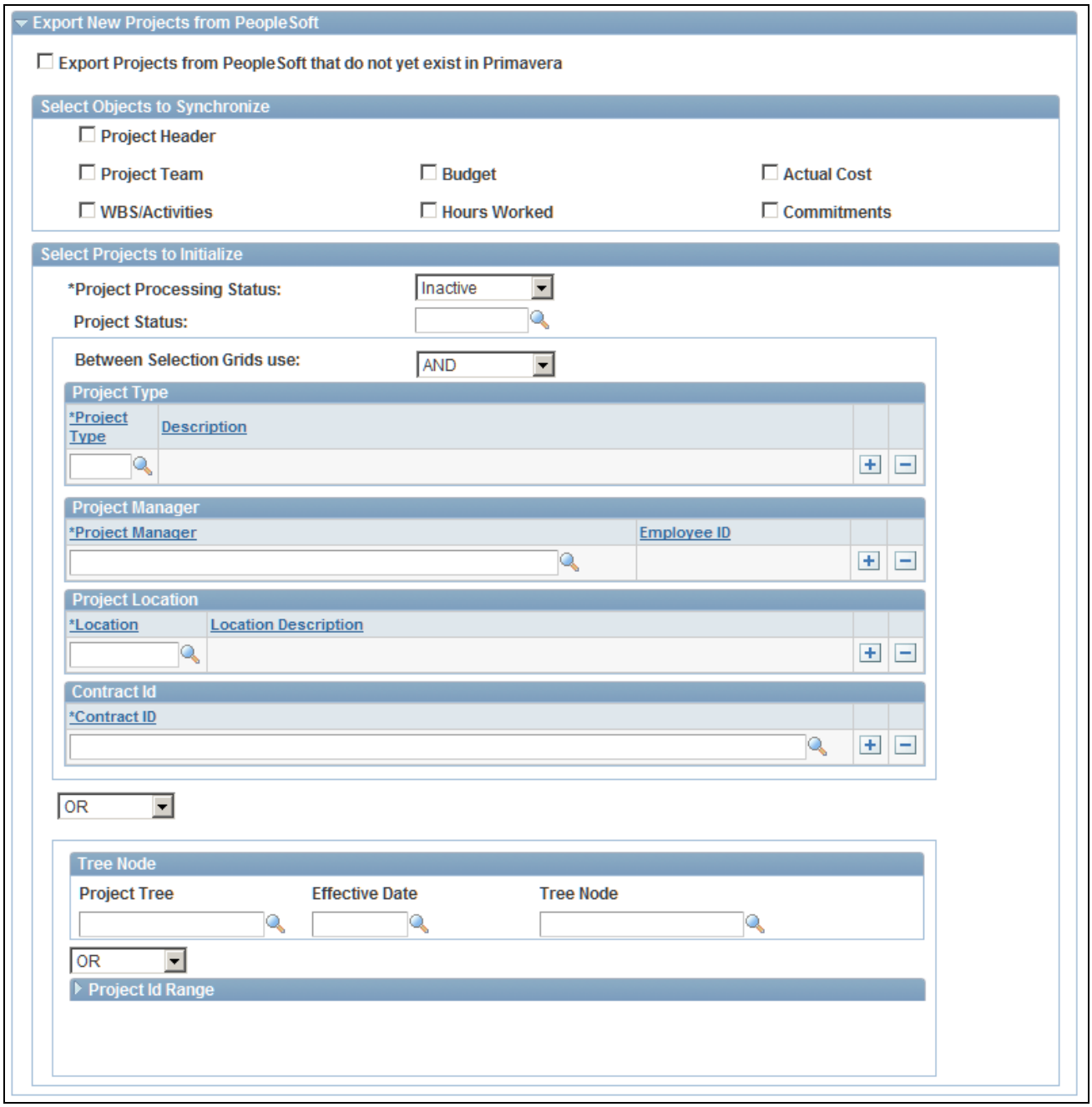

Synchronize Net New Projects page (Export New Projects from PeopleSoft section expanded)

Use this page to run the Project Data Synchronization process (PGM_SYNC_PRJ) to import and export new projects that do not exist in PeopleSoft or in Primavera P6.

Note. If a project is exported as new, but the project exists on the cross reference table (has already been exported), then the system does not export the project from the Synchronize Net New Projects run control, and an error is not sent to the synchronization log or the Application Engine message log. This can occur if a project that was previously synchronized is included in a project ID range or selected as a specific project ID. If you have previously synchronized a project with Primavera P6, then you should always use the Synchronize Existing Project page for subsequent synchronizations of that project.

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Business Unit

Select a business unit that used during the import and export process.

When importing net new projects from Primavera P6 to PeopleSoft, this business unit is used as the business unit to request new projects from Primavera P6. Primavera P6 returns net new projects that are assigned to that business unit.

When exporting net new projects from PeopleSoft to Primavera P6, this business unit is used as the selection criteria for exporting net new projects.

Import Projects from Primavera that do not yet exist in PeopleSoft

Select to indicate that you want to import projects from Primavera P6 for the PeopleSoft business unit that is selected in the Business Unit field.

Within the Primavera P6 system, a net new project must have the ERP Sync Status field set to Ready. This indicates that the project in Primavera P6 will be selected during the net new project import process.

Export Projects from PeopleSoft that do not yet exist in Primavera

Select to indicate that you want to export projects from the PeopleSoft business unit that is selected in the Business Unit field to Primavera P6.

All projects for the business unit selected, that have the Include in Integration check box selected on the Project Definitions – Primavera page, and do not exist in the cross reference table are synchronized.

Select Objects to Export

Use this group box to select the objects that you want to export to Primavera P6. The process sends all objects that are selected in the selection criteria on the run control. The project's Synchronization Template is not referenced for this process.

Project Header

This check box is automatically selected and cannot be deselected.

The data that is sent includes these fields: Project ID, Project Description, Location, Start and End date, Early Start Date, Early Finish Date, Actual Start Date, Actual Finish Date, Project Type, Project Status, Project Manager Employee ID.

WBS/Activities

Select to export WBS and detailed activities to Primavera P6.

This option must be selected if the Budget, Hours Worked, Actual Costs, or Commitments options are selected.

Hours Worked

Select to export hours worked.

The WBS/Activities check box must be selected to select this option. In addition, the system verifies that a Labor Analysis Group is defined for the business unit on the Project Costing Options – Primavera page.

Commitments

Select to export commitments.

When this option is selected, the WBS/Activities and the Project Header options are also selected. In addition, the system verifies that a commitment analysis group is defined for the business unit on the Project Costing Options – Primavera page.

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Project Team	Select to export project team data.
Budget	Select to export budget data. When this option is selected, the WBS/Activity and the Project Header options are also selected.
Actual Costs	Select to export actual costs. The WBS/Activities check box must be selected to select this option.

Select Projects to Initialize

Use this group box to select specific projects that meet the selected criteria when exporting net new projects to Primavera P6.

All fields in this group box are optional and are used to limit the project(s) selected for processing. For example, if you don't select a project type, then projects with all project types are selected.

Project Processing Status	Select the processing status of the project.
Project Status	Select the status of the project.
Between Selection Filter Grid use	This drop down box determine if the system creates and *AND* or an *OR* relationship amongst the selection filters entered in the Project Type, Project Manager, Project Location, and Contract ID sections.
Project Type	Select one to 20 project types.
Project Manager	Select one to 20 project manager names.
Project Location	Select one to 20 project locations.
Contract ID	Select one to 20 contract IDs. Valid contracts are those that have a project that is associated with the business unit specified in the Business Unit field. The contract does not have to be associated with the business unit, only the project that is associated with the contract. When a contract ID is entered, the system selects all projects that are associated with the contract and have the same business unit that is specified in the Business Unit field. If the project is associated with the business unit and has only one activity associated with the contract, then the system exports the entire project. Not just the activity. This field is available only when PeopleSoft Contracts is installed.
(AND or OR drop down box)	The drop down box that is above the Tree Node section determines if the system creates an *AND* or an *OR* relationship between the results of the four filter sections above and the results of the two filter sections below.

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Project Tree, Effective Date, and **Tree Node**	Select a project tree. The system automatically enters the latest effective date associated with the tree that is not in the future. The system also automatically enters the root node in the Tree Node field. You can change the Effective Data, Tree Node, or both if needed. Only the projects that are associated with this project tree, tree node, are below on the effective date, and have the Include in Integration check box selected on the General Information - Primavera page, are selected.
(AND or OR drop down box)	The drop down box that is between the Tree Node section and the Project ID Range section determines if the system creates an *AND* or an *OR* relationship between the two filter sections.
Project ID Start and **Project ID End**	Select a range of project IDs. Valid project IDs are those that have been defined for the business unit specified in the Business Unit field and have the Include in Integration check box selected on the General Information – Primavera page.

Synchronizing Existing Projects

Access the Synchronize Existing Projects page (Program Management, Primavera Integration, Synchronize Existing Project Data).

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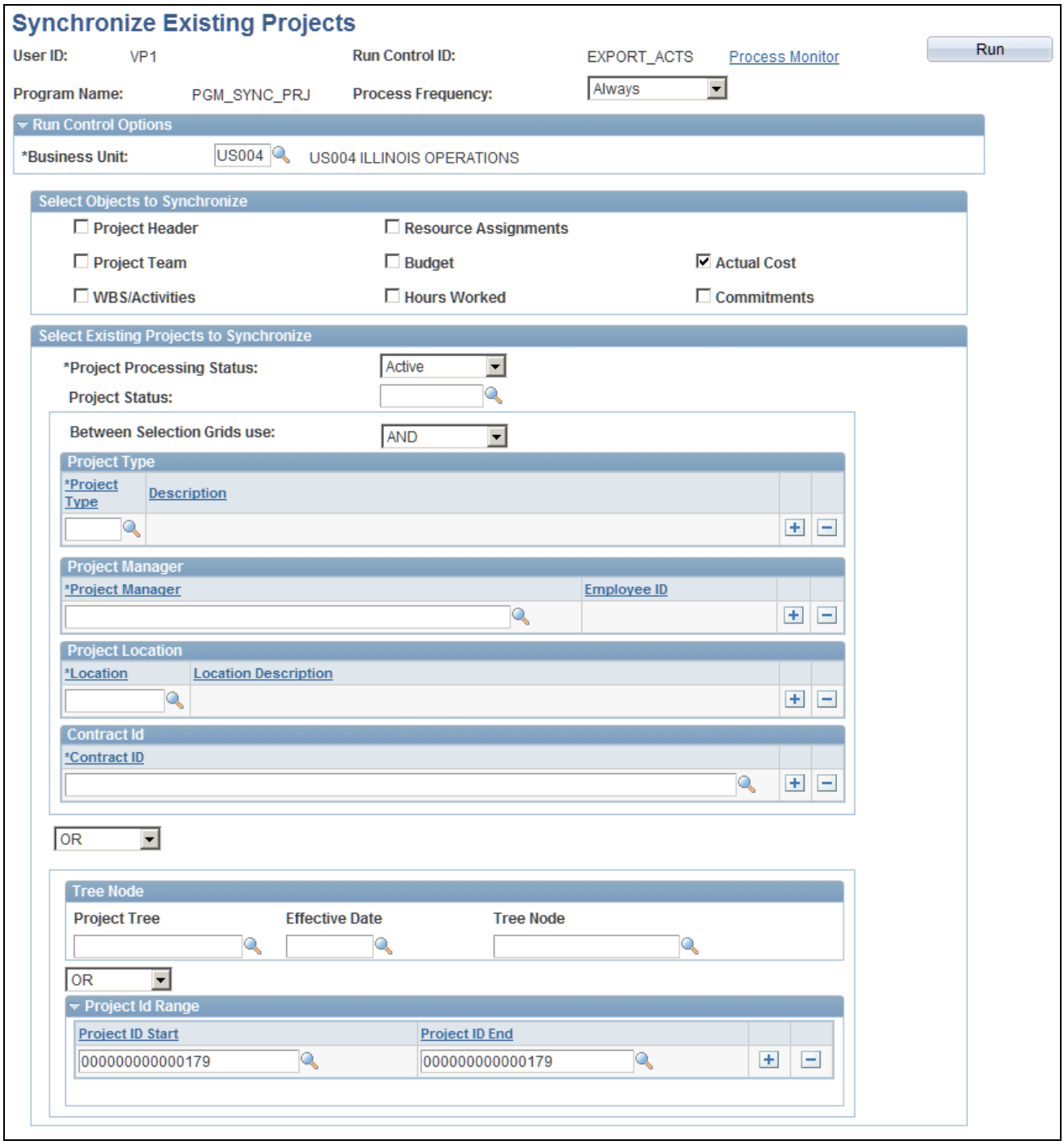

Synchronize Existing Projects page

Use this page to run the Project Data Synchronization process (PGM_SYNC_PRJ) to synchronize existing projects in PeopleSoft Program Management and Primavera P6. These projects also exist in the cross reference tables.

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The synchronization template that is associated with the project is used by the system to determine the direction of the data to be synchronized. This page enables you to select which objects you want to synchronize for existing projects. Therefore, the synchronization template determines the direction that the data is sent and this page determines the objects that are synchronized. For example, if you want to synchronize only the activities of an existing project, you would select the WBS/Activities check box, and the WBS/Activities are synchronized in the direction stated on the synchronization template associated with the project.

When synchronizing data, if a child record is sent and the parent record does not exist on the target system, then the system creates an error in the synchronization log.

Business Unit Select a business unit that is used during the import and export process.

When synchronizing existing projects between Primavera P6 and PeopleSoft, this business unit is used as the selection criteria.

Select Objects to Synchronize

Select the check box for the objects that you want to synchronize.

Project Header Select to indicate that project header data is to be synchronized in the direction that is determined on the synchronization template for the project.

Project Team Select to indicate that project team data is to be exported from PeopleSoft to Primavera.

WBS/Activities Select to indicate that WBS/Activities are to be synchronized in the direction, and at the WBS level, that is determined on the synchronization template for the project.

Resource Assignments Select to indicate that resource assignments are to be imported from Primavera P6 to PeopleSoft.

Budget Select to indicate that budget data is to be synchronized in the direction that is determined on the synchronization template for the project.

When importing from Primavera P6 to PeopleSoft, summary planned cost amounts at the WBS level are sent to PeopleSoft to generate budget details at the corresponding WBS for the project. The Summarizer must run in Primavera P6 to calculate the WBS Summary Planned Cost amounts before these values can be imported to PeopleSoft.

When exporting from PeopleSoft to Primavera P6, the total budget amount is summarized at the WBS *(summary activity)* level and at the project header level.

Hours Worked Select to indicate that hours worked data is to be exported from PeopleSoft to Primavera P6.

The system verifies that a Labor Analysis Group is defined for the business unit on the Project Costing Options – Primavera page.

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Actual Cost Select to indicate that actual cost data is to be exported from PeopleSoft to Primavera P6.

Commitments Select to indicate that commitment data is to be exported from PeopleSoft to Primavera P6.

The system verifies that a commitment analysis group is defined for the business unit on the Project Costing Options – Primavera page.

Select Existing Projects to Synchronize

Project Processing Status Select the processing status of the project.

Project Status Select the status of the project.

Between Selection Filter Grid use Select *AND* or *OR,* to determine the relationship between the values in the selection grids (Project Type, Project Manager, Project Location, and Contract ID).

Project Type Select one to 20 project types.

Project Manager Select one to 20 project manager names.

Project Location Select one to 20 project locations.

Contract ID Select one to 20 contract IDs. Valid contracts are those that have a project that is associated with the business unit specified in the Business Unit field. The contract does not have to be associated with the business unit, only the project that is associated with the contract.

When a contract ID is entered, the system selects all projects that are associated with the contract and have the same business unit that is specified in the Business Unit field.

If the project is associated with the business unit and has only one activity associated with the contract, then the system exports the entire project. Not just the activity.

This field is available only when PeopleSoft Contracts is installed.

(AND or OR drop down box**)** The drop down box that is above the Tree Node section determines if the system creates an *AND* or an *OR* relationship between the section above and the Tree Node section.

Project Tree, Effective Date, and **Tree Node** Select a project tree. The system automatically enters the latest effective date associated with the project tree that is not in the future. The system also automatically enters the root node in the Tree Node field.

Only the projects that are associated with this tree, tree node, are below on the effective date, and have the Include in Integration check box selected on the Projects Definitions - Primavera page, are selected.

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(AND or OR drop down box**)**	The drop down box that is between the Tree Node section and the Project ID Range section determines if the system creates an *AND* or an *OR* relationship between the two sections.
Project ID Start and **Project ID End**	Select a range of project IDs. Valid project IDs are those that have been defined for the business unit specified in the Business Unit field and have the Include in Integration check box selected on the Project Definitions – Primavera page.

Importing Timesheets from Primavera P6

Access the Import Time from Primavera page (Program Management, Primavera Integration, Import Time from Primavera):

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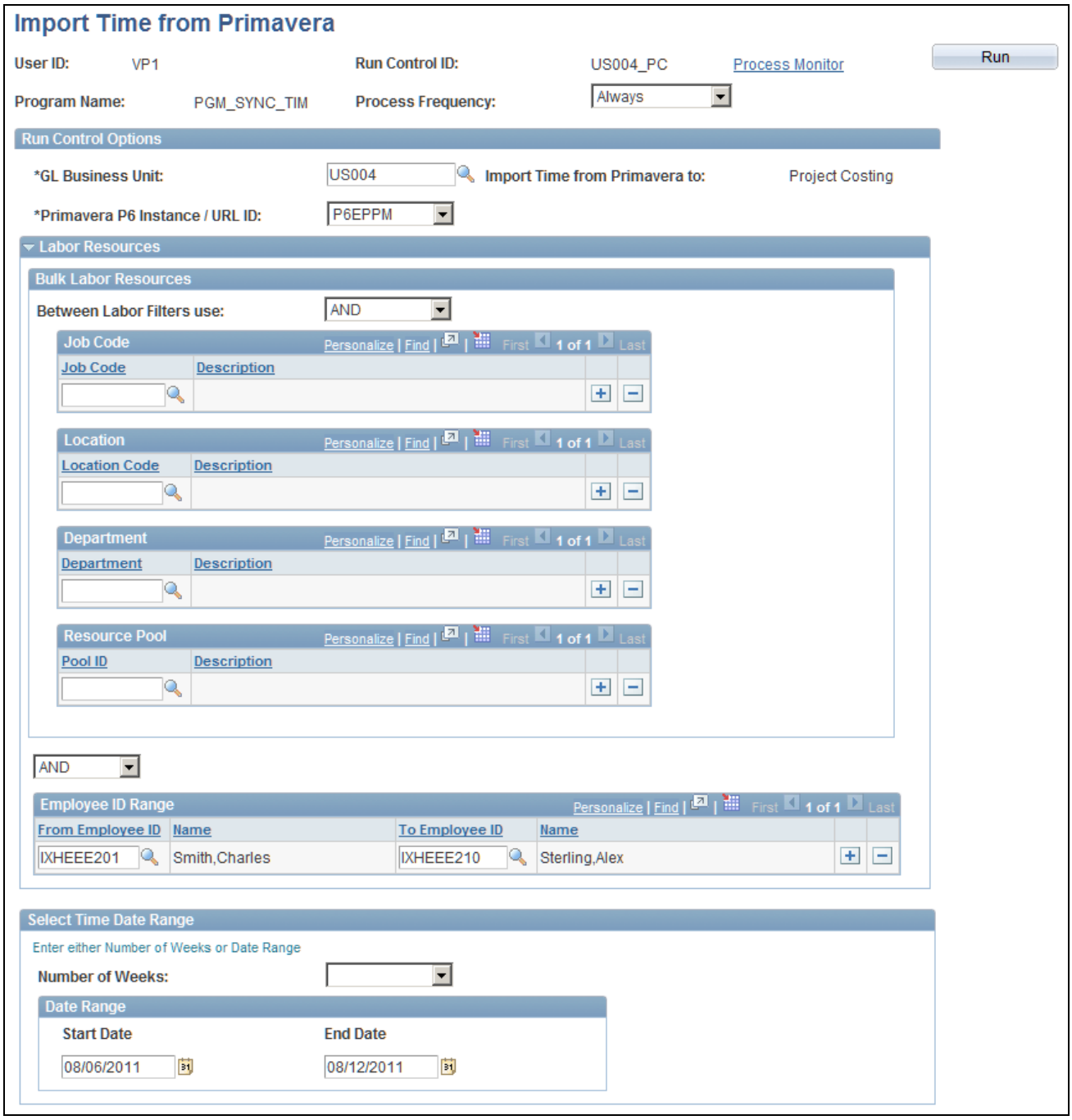

Import Time from Primavera page (when Project Costing is the target)

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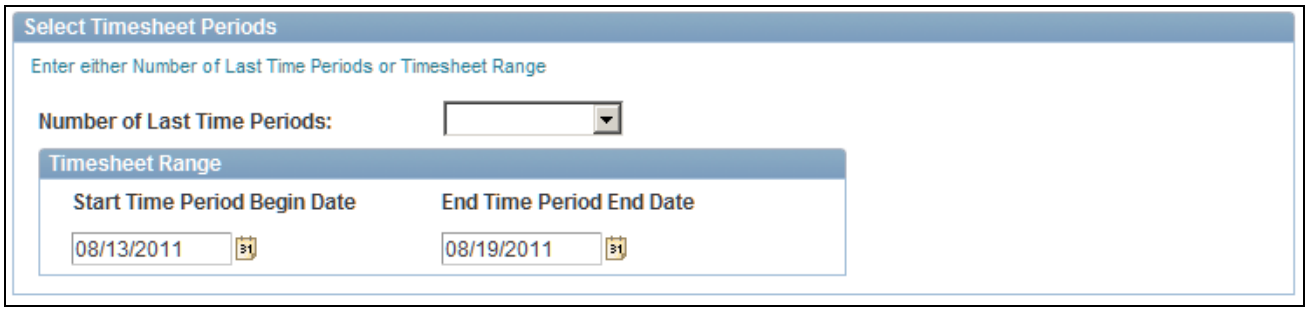

Import Time from Primavera page (when Expenses is the target, partial page shot)

Use this page to request to import approved timesheet data from Primavera P6 to PeopleSoft. The PGM_SYNC_TIM batch process uses the values entered on this run control page to determine the timesheet data that is processed from Primavera P6. Depending on the option selected in the Import Time from Primavera to field, for the General Ledger business unit on the run control, timesheet data from Primavera P6 is processed using one of these application libraries:

- P6_EX_LIB if data is to be imported into Expenses time reports.

  Time reports are created in Expenses with a status of Approved from the timesheet data that is returned from Primavera P6. These time reports include project time and policy (overhead) time. In order for the overhead time to be mapped properly, the TRC_CODE DVM must be set up prior to importing timesheet data.

  If a timesheet is adjusted in Primavera P6 after it has been imported to PeopleSoft Expenses, then the next time the timesheet data is imported the adjustment results in a new version of the original time report in Expenses.

  For additional information about setting up DVMs:

  See Implementing PeopleSoft Program Management 9.1 with Primavera P6 Enterprise Project Portfolio Management R8.1. This document is posted on My Oracle Support (MOS) Note number 1361217.1

- P6_PC_LIB if the data is to be imported into Project Costing Transactions.

  Time transactions are created on the Project Costing Transaction table (PROJ_RESOURCE) from the timesheet data that is returned from Primavera P6. These time transactions include only project time; policy (overhead) time is not imported to Project Costing.

  If a timesheet is adjusted in Primavera P6, after it has been imported to PeopleSoft Project Costing, then the next time the timesheet is imported the adjustment results in a reversal of the original time transaction and the creation of a new time transaction in Project Costing.

Run Control Options

GL Business Unit Select the General Ledger business unit for which to run the process. The general ledger business unit determines the business unit of the resources whose timesheets you want to import.

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Primavera P6 Instance / URL ID Select the Primavera P6 instance. This field indicates the instance from which the data is imported.

Note. It is assumed that an employee enters time for a given time period in only one Primavera P6 instance.

Import Time From Primavera to Displays *Expenses* or *Project Costing.* This field displays the option selected in the Import Time from Primavera to field on the Expenses Definition – Business Unit 2 page.

Labor Resources

Between Labor Filters use Select *AND* or *OR* to determine the relationship between the values in this section.

Job Code, Location, Department, and **Resource Pool** Select one to 20 job codes, locations, departments, or resource pools.

The Resource Pool field is displayed only if PeopleSoft Resource Management is installed.

(And / Or**)** The drop down box that is between the Bulk Labor Resources section and the Employee ID Range section determines if the system creates an *AND* or an *OR* relationship between the two sections.

From Employee ID and **To Employee ID** Select a range of employee IDs.

Select Timesheet Periods

This group box is displayed only when PeopleSoft Expenses is installed and Expenses is selected in the Import Time from Primavera to field on the Expenses Definition – Business Unit 2 page.

Number of Last Timesheet Periods Select the number of time periods in which you want to import. Options include: *Current Period, Last 2 Periods,Last 3 Periods,Last 4 Periods,* or *Last 5 Periods.*

You can use only this field to determine the timesheet period, or you can use the Start Time Period Begin Date and the End Time Period End Date fields.

Start Time Period Begin Date Enter the beginning date range to which you want to extract timesheets.

When time sheet periods are set up for the Expenses business unit, the system looks at the Start Time Period Begin Date to find the closest timesheet period in Expenses that begins on this date or before. The start date of this timesheet period, as determined by the system, is the start date of the date range that is sent to Primavera P6.

You can use this field with the End Time Period End Date field, or you can use only the Number of Last Timesheet Periods field.

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End Time Period End Date Enter the end date range to which you want to extract timesheets.

When time sheet periods are set up for the Expenses business unit, the system looks at the End Time Period End Date to find the closest timesheet period in Expenses that is equal to or greater than the end date entered in this field. The end date of this timesheet period, as determined by the system, is the end date of the date range that is sent to Primavera P6.

You can use this field with the Start Time Period End Date field, or you can use only the Number of Last Timesheet Periods field.

Select Time Date Range

This group box is displayed only when Project Costing is selected in the Import Time from Primavera to field on the Expenses Definition – Business Unit 2 page.

Number of Weeks Select Current Week through Last 8 Weeks. This option indicates the number of weeks to process.

You can use only this field to determine the timesheet period, or you can use the Start Date and the End Date fields.

Start Date Enter the beginning date range to which you want to extract resource hours. This is the start date that is sent to Primavera P6.

You can use this field with the End Date field, or you can use only the Number of Weeks field.

End Date Enter the end date range to which you want to extract resource hours. This is the end date that is sent to Primavera P6.

You can use this field with the Start Date field, or you can use only the Number of Weeks field.

Exporting Data from the Project Activities Page

Access the Project Activities page (Project Costing, Activity Definitions, Project Activities).

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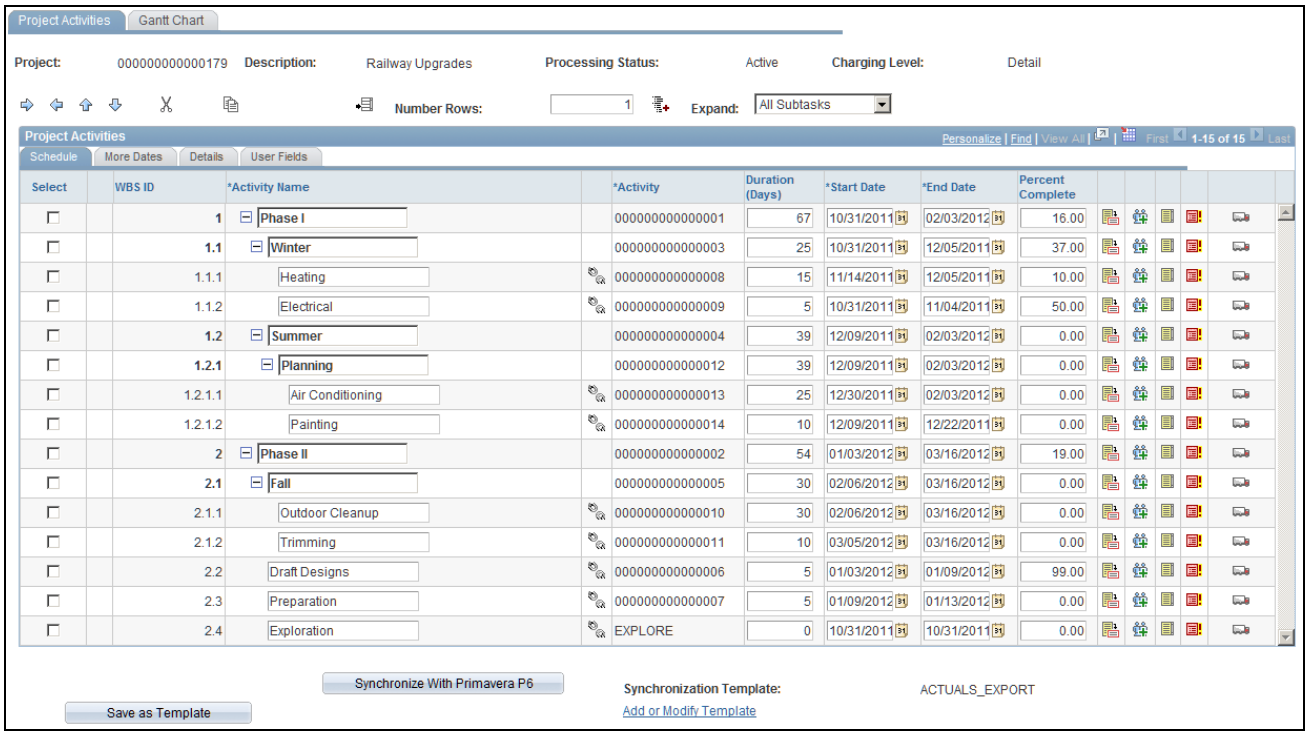

Project Activities page

For more information about the other fields on this page:

See *PeopleSoft Project Costing 9.1 PeopleBook*, "Creating and Maintaining Activities," Adding Project Activity Schedules.

Synchronize with Primavera P6

Click this button to export the project to Primavera P6.

After you click this button, and the project:

- Has not been previously exported to Primavera P6, then the system displays a confirmation message.

  When you click OK to the message, the system takes you to the Synchronize Net New Projects run control page.

- Has been previously exported to Primavera P6, then the system displays a confirmation message that includes the synchronization template to which the system will use.

  When you click OK to the message, the system runs the synchronization process for the project.

This button is displayed only when the Include in Integrations check box is selected on the Project Definitions – Primavera page for the project and:

- If it's a new project, the user has security access to the Synchronize Net New Projects run control page.

- If it's an existing project, the user has security access to the Synchronize Existing Projects run control page.

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Synchronization Template	Displays the template that is selected for the project. If no synchronization template is specified for the project, then the system uses the synchronization template that is specified for the business unit. This field is displayed only when the Include in Integration check box is selected on the Project Definitions – Primavera page and if the user has security access to the Synchronization Template page.
Add or Modify Template	Click this link to access the Synchronization Template page, where you can add a new synchronization template or modify an existing template. This link is available only when the Include in Integration check box is selected on the Project Definitions – Primavera page and if the user has security access to the Synchronization Template page.

Viewing the Synchronization Log

This section provides an overview of the synchronization log and discusses how to:

- View the status of project data.
- View errors from project data integration.
- View the status of master data.
- View errors from master data integration.
- View the status of data for a specific project.
- View the status of timesheet data.
- View a summary of transformation errors.
- View the source of an error.
- Run the error checking process.

Understanding the Synchronization Log

The Synchronization Log is an online component that captures the synchronization status of master and project data integration between PeopleSoft Program Management and Primavera P6. The Synchronization Log component consists of four pages: one for project data, a second for master data, a third allows the user to search the synchronization status for a specific project, and a fourth for timesheet data.

The Synchronization Log can be used to view the status of the synchronization processes while they are running and to view synchronization results when the processes are complete.

There are two types of data edit errors that can occur during synchronization:

- Application.
- Transformation.

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Each can have warnings (for non-required fields) and errors (for required fields).

Application warnings and errors can be viewed using the Synchronization Log component and viewing the Project Data, Master Data, Search Log by Project Id, and Timesheet Sync Log tabs.

Transformation warnings and errors can be viewed by clicking on the Error Data links on the Project Data Sync Log page or the Transformation Error Review – Error Summary page.

For an definition of errors and warnings, see the Common Terms section.

See Chapter 22, "Integrating with Primavera P6," Common Terms and Elements Used in this Chapter, page 418.

For information about reviewing and resolving synchronization errors and warnings:

See Implementing PeopleSoft Program Management 9.1 with Primavera P6 Enterprise Project Portfolio Management R8.1. Synchronizing Data and Resolving Errors, Reviewing and Resolving Synchronization Errors. This document is posted on My Oracle Support (MOS) Note number 1361217.1

Common Elements Used in this Section

Export to P6 Status	Displays the status of the export process. Values include: *Complete,Error, Complete With Warnings, Time Out,Not Processed, Sending,Received, Complete With Errors,* and *Not Committed.*
Export to P6 Date/Time	Displays the date and time in which the Export to P6 Status field was last updated.
Import From P6 Status	Displays the status of the import process. Values include: *Complete, Error, Complete With Warnings, Time Out, Not Processed, Sending, Received,* and *Complete With Errors.*
Import From P6 Date/Time	Displays the date and time in which the Import From P6 Status field was last updated.
Object Types	Displays the object type that was requested to be synchronized: • Project data options include: *Work Breakdown / Activities,Budget, Commitments,Hours Worked, Resource Assignment,Actual Costs, Project Team,* and *Project Header.* • Master data options include: *Materials,Equipment,Labor Resources,* and *Resource Rates.*

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Source Values

Displays the attributes of the object that caused an error or warning. These values help to identify the specific object and correct it. However, the content of this field is determined by the object type:

- Exported master data displays PeopleSoft field values:

Object	***Displays***
Labor	BUSINESS_UNIT + EMPLID + EMPLOYEE_NAME
Resource Rates	BUSINESS_UNIT + EMPLID + EFFECTIVE_DATE (of the rate)
Material	BUSINESS_UNIT + INVENTORY_ITEM_ID + DESCR
Equipment	BUSINESS_UNIT + ASSET_ID + DESCR

- Imported project data displays Primavera P6 field values:

Object	***Displays***
Project Header	PROJECT_OBJECTID + DESCR
WBS/Activities	PROJECT_OBJECTID + ACTIVITY_OBJECTID + ACTIVITY_DESCR
Resource Assignments	PROJECT_OBJECTID + P6_ROLLEDUP_WBSOBJ + REASSIGN_OBJECTID However, for bypass errors, the system displays PROJECT_OBJECTID + P6_ROLLEDUP_WBSOBJ

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- Exported project data displays PeopleSoft field values:

Object	*Displays*
Project Header	BUSINESS_UNIT + PROJECT_ID
WBS/Activities	BUSINESS_UNIT + PROJECT_ID ACTIVITY_ID + ACTIVITY_DESCR
Project Team	BUSINESS_UNIT + PROJECT_ID + ACTIVITY_ID + TEAM_MEMBER_CLASS + TEAM_MEMBER_IND + TEAM_MEMBER

- Imported timesheet data displays PeopleSoft field values:

Object	*Displays*
Timesheet	EMPLID + DATE_UNDER_RPT

Pages Used to View the Synchronization Log

Page Name	*Definition Name*	*Navigation*	*Usage*
Project Data Sync Log	PGM_P6_SYNC_PROJ	Program Management, Primavera Integration, Synchronization Log	View the status of project data.
Synchronization Log : Project Data Errors	PGM_P6_SYNC_PRJ_ER	Click the Error Data link in the Details for Run Control ID section, Project Errors column of the Project Data Synch Log page	View errors and warnings from project data integration.
Master Data Sync Log	PGM_P6_SYNC_MST	Program Management, Primavera Integration, Synchronization Log Click the Master Data Sync Long tab.	View the status of master data.
Synchronization Log : Master Data Errors	PGM_P6_SYNC_MST_ER	Click the Error Data link in the Summary Information section, Master Data Errors column on the Master Data Sync Log page.	View errors and warnings from master data integration.

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Page Name	*Definition Name*	*Navigation*	*Usage*
Search Log by Project Id	PGM_P6_SYNC_PROJID	Program Management, Primavera Integration, Synchronization Log Click the Search Log by Project Id tab.	View the status of data for a specific project.
Synchronization Log: Timesheet Sync Log	PGM_P6_SYNC_TIME	Program Management, Primavera Integration, Synchronization Log Click the Timesheet Sync Log tab.	View the status of timesheet data.
Transformation Error Review – Error Summary	P6_ERR_LOG_REVIEW	Program Management, Primavera Integration, Transformation Errors Click the Error Data link in the Transformation Errors column of the Project Data Sync Log, the Master Data Sync Log, the Search Log by Project Id, or the Timesheet Sync Log pages.	View a summary of DVM and XREF errors and warnings, and Bypass errors.
Transformation Error Review – Error Data	P6_ERR_DATA_REVIEW	Program Management, Primavera Integration, Review Transform Errors Click the Error Data link, in the Error Data column of the Error Summary section, on the Transformation Error Review – Error Summary page.	View the source of an error or warning.
Update Error Status Log	RUN_PGM_P6_ERRCHK	Program Management, Primavera Integration, Update Error Status Log	Run the error checking process.

Viewing the Status of Project Data

Access the Project Data Sync Log page (Program Management, Primavera Integration, Synchronization Log).

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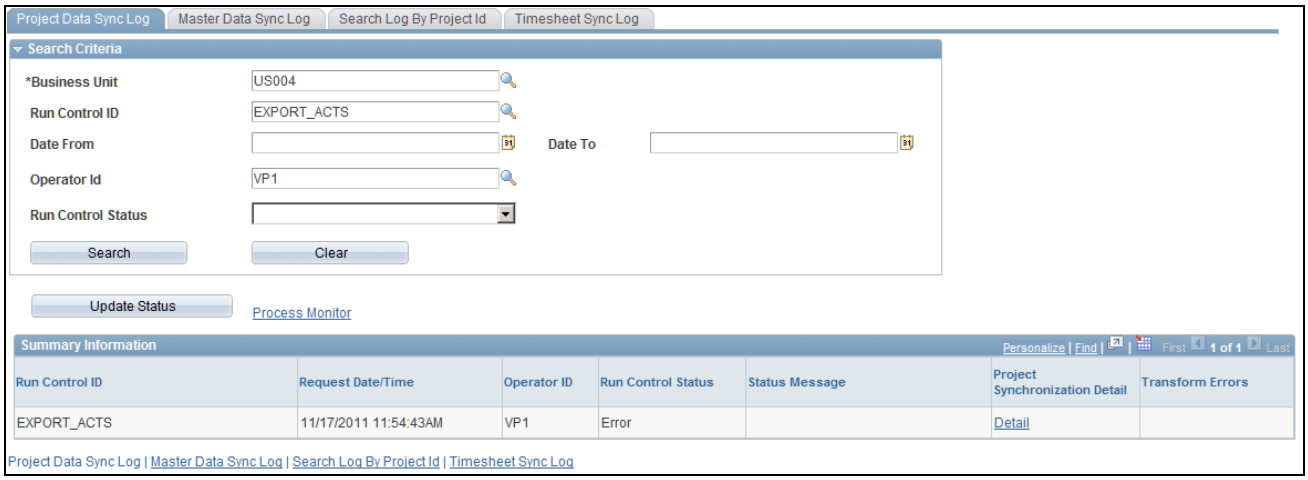

Project Data Sync Log page

Use this page to view the status of integration data for projects that are related to each run control ID. This page contains a summary of information and provides a status of run control requests. The Details for Run Control ID section contains information for each project that was synchronized during that run control.

To view synchronization detail, click the Detail link in the Project Synchronization Detail column of the Summary Information section:

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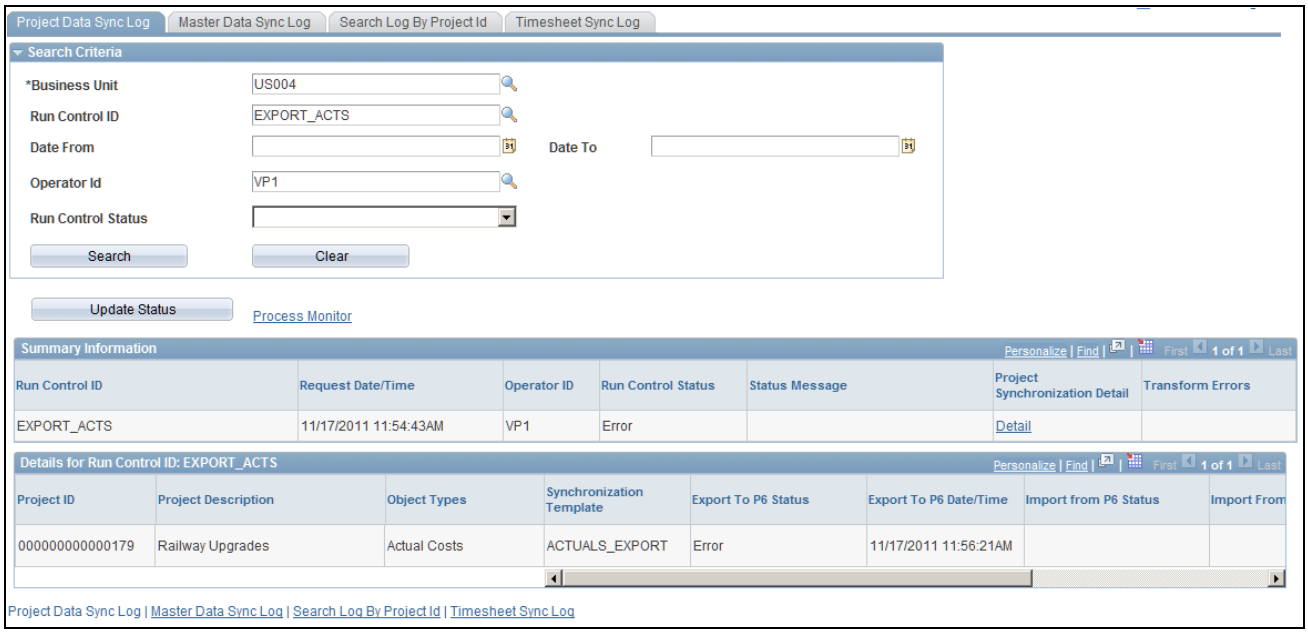

Project Data Sync Log page (Details for the Run Control) (1 of 2)

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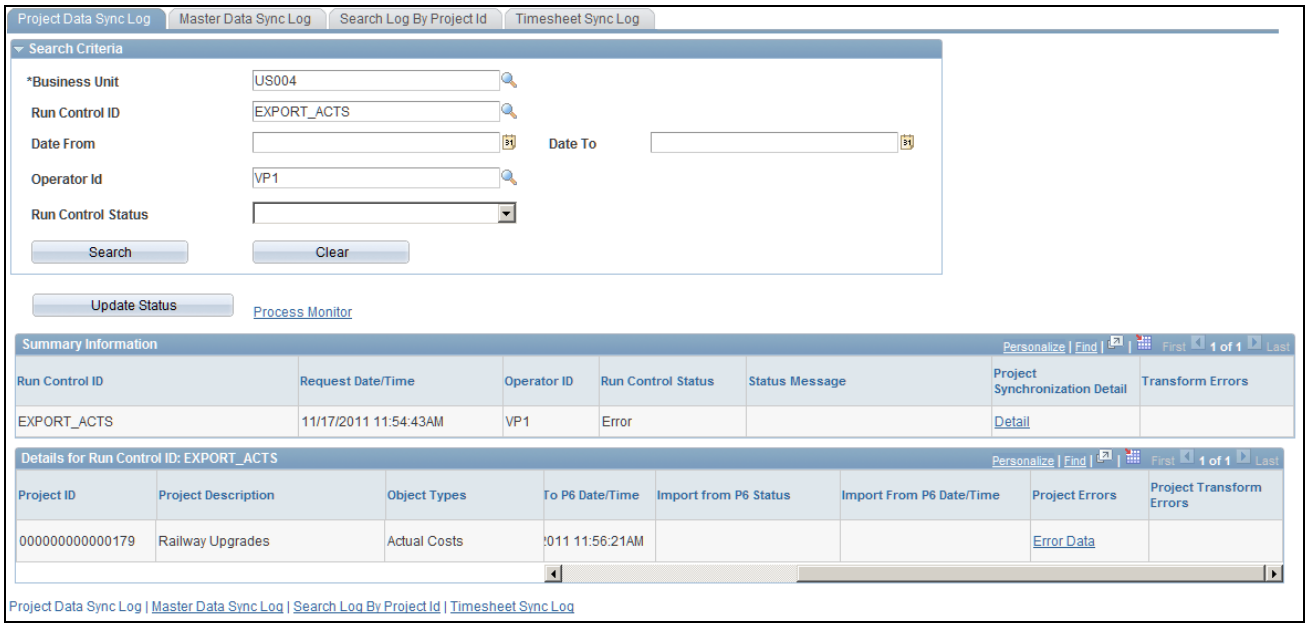

Project Data Sync Log page (Details for the Run Control) (2 of 2 horizontal scroll bar)

If application errors and warnings are encountered during the synchronization process, they can be accessed and viewed by clicking the Error Data link in the Project Errors column of the Details for Run Control ID: xxx section.

If transformation errors and warnings are encountered during the synchronization process, they can be accessed and viewed by clicking the Error Data link in the Project Transform Errors column of the Summary Information section, or by clicking the Error Data link in the Project Transform Errors column of the Details for Run Control ID: xxx section.

Search Criteria

Select your search criteria and click the Search button.

Operator ID Enter the user or operator who executed or scheduled the synchronization process.

Run Control Status Select a status of: *Processing,Complete,Compete with Errors,Error,* or *Complete with Warnings.*

Update Status Click to update object types for project data where the status of the import, export and run control has not been updated. An Application Engine process runs in the background and updates these statuses on the Project Data Sync Log page. Use the Process Monitor link to monitor this process.

Summary Information

This section displays the results of a search.

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Project Synchronization Detail Click the Detail link to access the Details for Run Control ID: xxx section of the page.

Transform Errors Click the Error Data link to access the Transform Error Review – Error Summary page that is associated with the run control ID. This link is displayed only when there are transform errors for the run control.

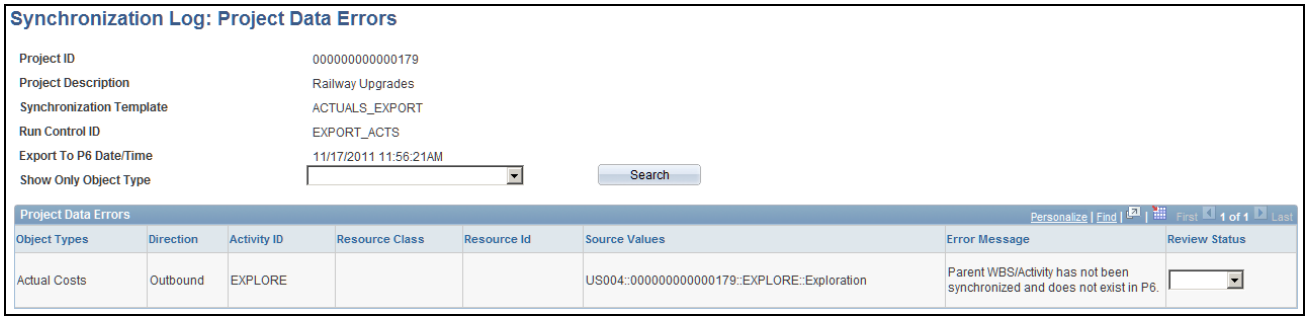
Details for Run Control ID: xxx

Project Errors Click the Error Data link to access the Project Data Errors page. This link is displayed only when application errors are associated with the project.

Project Transform Errors Click the Error Data link to access the Transform Error Review – Error Summary page that is associated with the run control ID. This link is displayed only transform errors exist for the selected criteria.

Viewing Errors from Project Data Integration

Access the Synchronization Log: Project Data Errors page (Click the Error Data link in the Project Errors column of the Details for Run Control ID section on the Project Data Sync Log page).



Synchronization Log: Project Data Errors page

Use this page to view errors that are specific to a project ID.

Show Only Object Type Select an object type to view data errors that are associated with a specific object type. Options can include: *Work Breakdown/ Activities, Budget, Commitments,Hours Worked, Resource Assignment, Actual Costs, Project Team,* and *Project Header*. However, the system only displays option types that have errors.

Click the Search button after making your selection. If you leave this field blank, the system displays all object types.

Direction Displays *Inbound* or *Outbound,* which indicates the direction of the object type that has an error.

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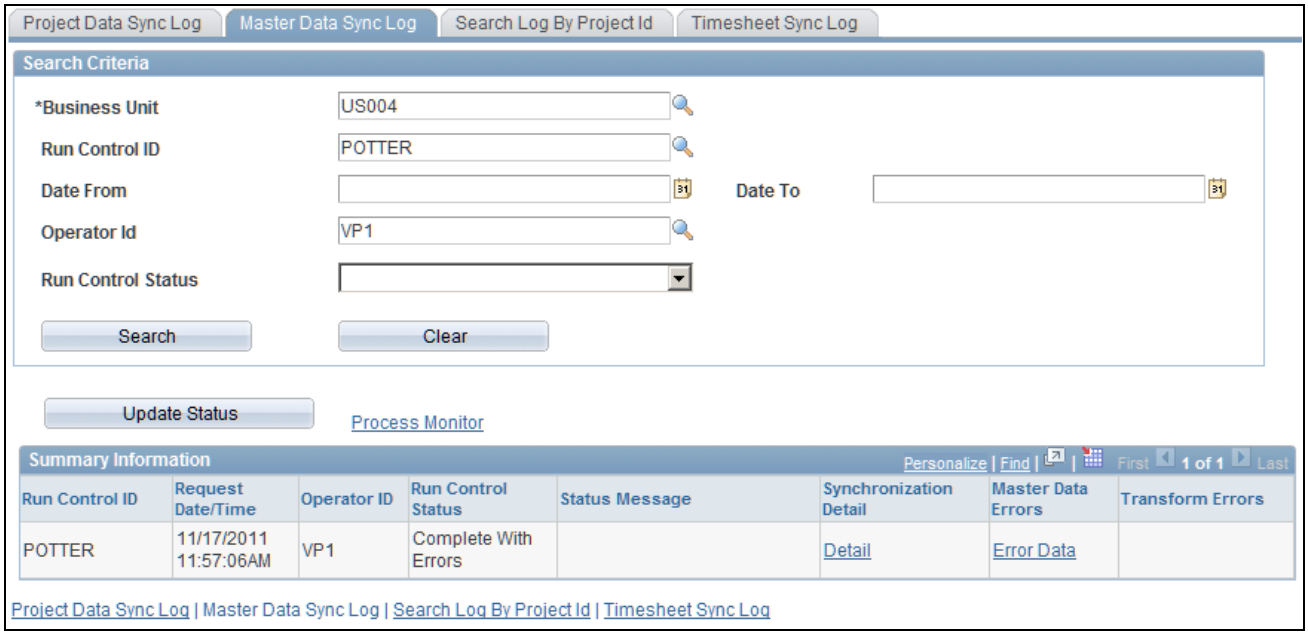
Activity ID, Resource Class, and**Resource ID**	Displays only when it is associated with the object type.
Review Status	This field initially defaults to blank and is information. No processing occurs from this field. However, you can use this field to track the status of errors. • Select *Open* to indicate that you have seen the error and are researching it. • Select *Fixed* to indicate that the error is fixed.
Review Transaction Details	Click this link to access errors that are the result of the Project and Activity Loader process (PC_INTF_GEN). This column is displayed only when errors exist from the Project and Activity Loader process
Save	Click to save the changes made to the Review Status field.

Viewing the Status of Master Data

Access the Master Data Sync Log page (Program Management, Primavera Integration, Synchronization Log. Click the Master Data Sync Log tab).



Master Data Sync Log page

Use this page to view the status of integration data for master data. This page contains a summary of information and provides a status of run control requests. The Details for Run Control ID section contains information for the resource object types that were synchronized during that run control.

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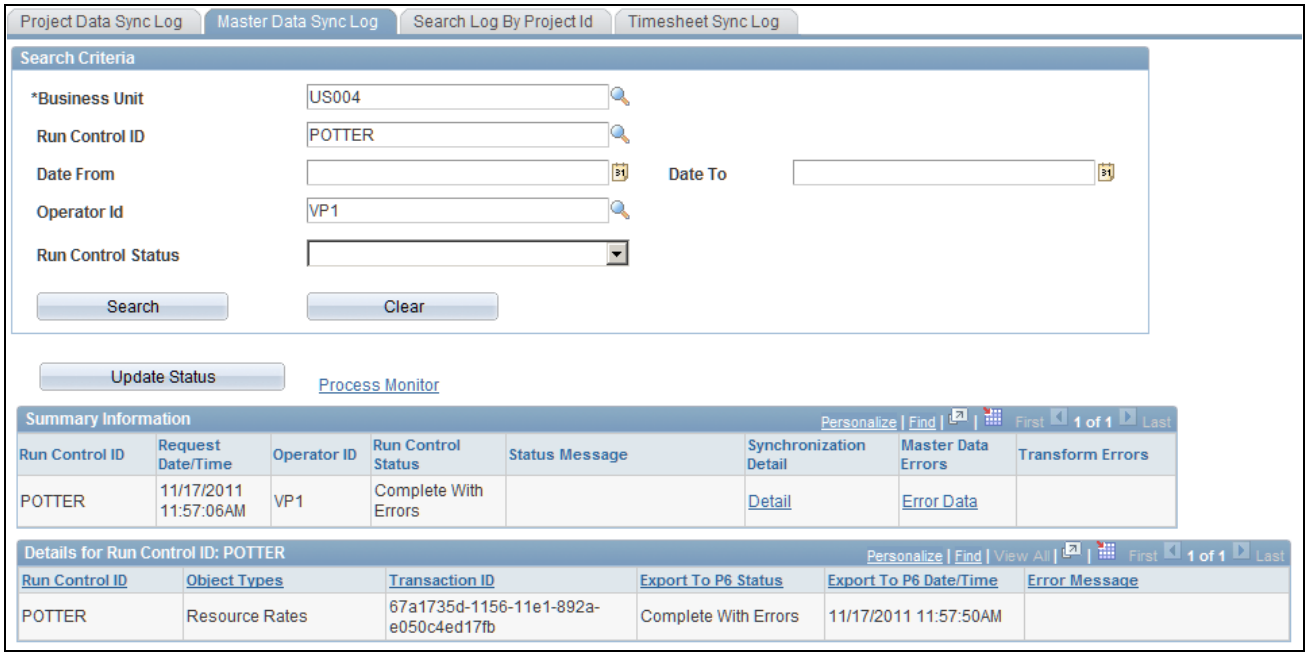
To view synchronization detail, click the Detail link in the Synchronization Detail column of the Summary Information section:



Master Data Sync Log page (Details for Run Control)

If PeopleSoft application errors and warnings are encountered during the synchronization process, then can be accessed and viewed by clicking the Error Data link in the Master Data Errors column.

If transformation errors and warnings are encountered during the synchronization process, they can be accessed and viewed by clicking the Error Data link in the Transform Errors column.

When an error is returned in the Primavera P6 response, it applies to the entire scope of the transaction (Integration Broker transaction ID). This includes all of the object types that were included in the run control request. Errors and warnings that are returned by Primavera P6 are displayed in the Error Message column.

Search Criteria

Select your search criteria and click the Search button.

Operator ID Enter the user or operator who executed or scheduled the synchronization process.

Run Control Status Select a status of: *Processing,Complete, Compete with Errors, Error,* or *Complete with Warnings.*

Update Status Click to update object types for master data where the status of the export and run control has not been updated. An Application Engine process runs in the background and updates these statuses on the Master Data Sync Log page. Use the Process Monitor link to monitor this process.

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Summary Information

This section displays the results of a search.

Synchronization Detail Click the Detail link to access the detail for the run control ID at the bottom of the page.

Master Data Errors Click the Error Data link to access the Master Data Errors page. This link is displayed only when there are application errors and warnings associated with the master data synchronization for the run control ID.

Transform Errors Click the Error Data link to access the Transform Error Review pages that are associated with the run control ID. This link is displayed only when transform errors or warnings exist for the selected criteria.

Details for Run Control ID: xxx

IB Transaction ID (Integration Broker Transaction Identifier) Displays the Integration Broker transaction ID.

Error Message Displays error messages, warning messages, or both.

Viewing Errors from Master Data Integration

Access the Synchronization Log: Master Data Errors page (Click the Error Data link in the Master Data Errors column of the Summary Information section, on the Master Data Sync Log page).

Synchronization Log: Master Data Errors page

Use this page to view PeopleSoft application errors and warnings that are specific to master data for a specific run control ID.

Show Only Object Type Select an object type to view data errors that are associated with a specific object type. Options are: Equipment, Materials, Labor Resources, and Resource Rates. However, the system will only display the options that have errors and warnings.

Click the Search button after making your selection. If you leave this field blank, the system displays all object types.

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Item ID, Asset ID, Employee ID, and **Rate Effective Date**	Displays only when it is associated with the object type.
Review Status	This field initially defaults to blank and is informational. No processing occurs from this field. However, you can use this field to track the status of errors. • Select *Open* to indicate that you have seen the error and are researching it. • Select *Fixed* to indicate that the error is fixed.
Error Message	Displays error messages, warning messages, or both.
Save	Click to save the changes made to the Review Status field.

Viewing the Status of Data for a Specific Project

Access the Search Log by Project Id page (Program Management, Primavera Integration, Synchronization Log. Click the Search Log by Project Id tab).

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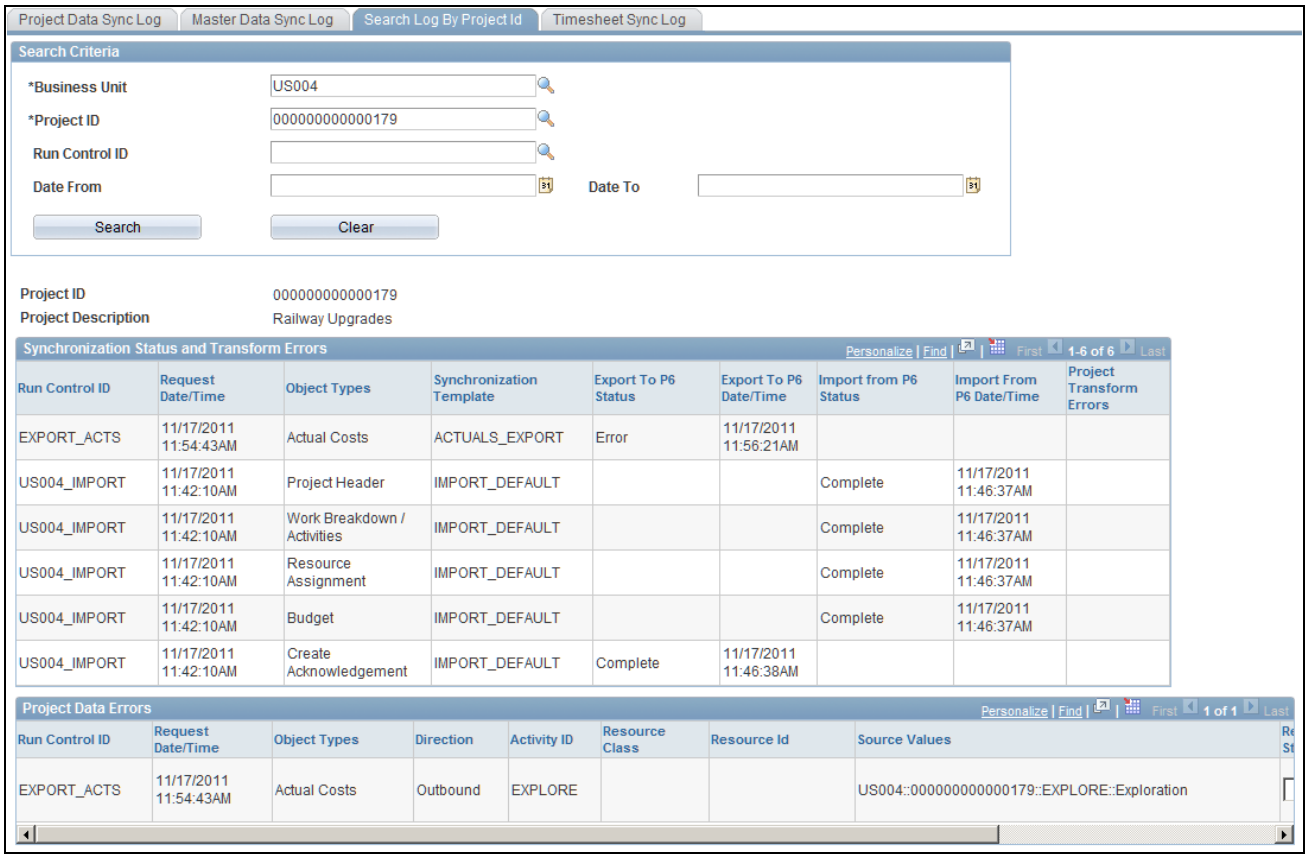

Search Log by Project Id page

Use this page to search the synchronization log for errors and warnings that are related to a specific project.

Search Criteria

Select your search criteria and click the Search button to display the Synchronization Status and Transform Errors and the Project Data Errors sections.

If application errors and warnings are encountered during the synchronization process, they are displayed in the Project Data Errors section. If application errors or warnings do not exist for the selected project, then the Project Data Errors section is not displayed.

If transform errors and warnings are encountered during the synchronization process, they can be accessed and viewed by clicking on the Error Data link in the Synchronization Status and Transform Errors section.

Synchronization Status and Transform Errors

This section displays the results of a search.

Export to P6 Status Displays the status of the export process. Values include: *Sending, Complete, Complete with Warnings,Not Processed, Time Out, Error, Complete with Errors,Received,* and *Not Committed.*

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Export to P6 Data/Time	Displays the date and time in which the Export To P6 Status field was last updated.
Import From P6 Status	Displays the status of the import process. Values include: *Sending, Complete, Complete with Warnings,Not Processed, Time Out, Error, Complete with Errors,* and *Received.*
Import From P6 Date/Time	Displays the date and time in which the Import From P6 Status field was last updated.
Project Transform Errors	Click the Error Data link to access the Transform Error Review page for the project, run control, and date and time selected. This link is displayed only when transform errors exist for the selected criteria.

Project Data Errors

Use this section to view errors and warnings that are specific to the selection criteria.

Direction	Displays *Inbound* or *Outbound.*
Activity ID, Resource Class, and **Resource ID**	Displays only when it is associated with the object type.
Review Status	This field initially defaults to blank and is information. No processing occurs from this field. However, you can use this field to track the status of errors. • Select *Open* to indicate that you have seen the error and are researching it. • Select *Fixed* to indicate that the error is fixed.
Error Message	Displays error messages, warning messages, or both.
Save	Click to save the changes made to the Review Status field.

Viewing the Status of Timesheet Data

Access the Timesheet Sync Log page (Program Management, Primavera Integration, Synchronization Log. Click the Timesheet Sync Log).

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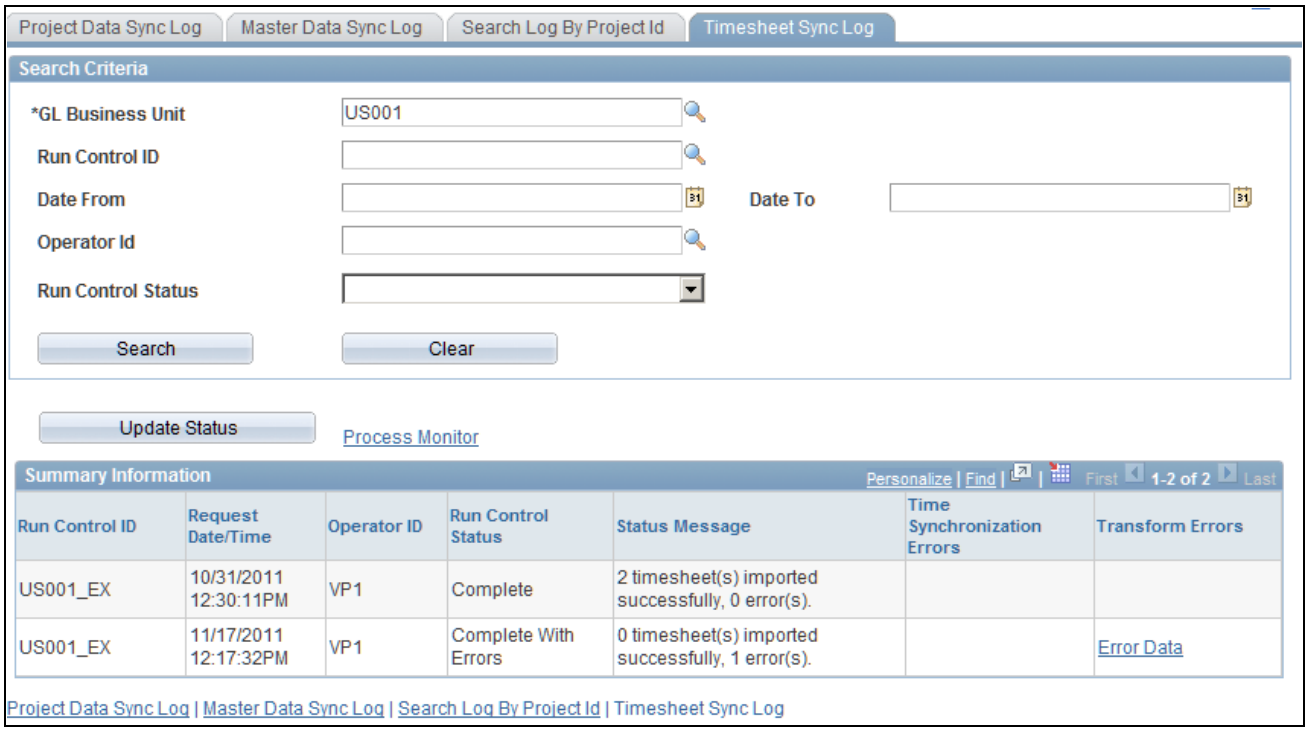

Timesheet Sync Log page

Use this page to search the synchronization log for errors and warnings that are related to the Timesheet synchronization process (PGM_SYNC_TIM).

If timesheets are imported to Expenses and an error is encountered for a given timesheet, then the entire timesheet is rejected and not loaded into PeopleSoft Expenses. The only exception is if the error is due to a project on the timesheet that was not previously synchronized to PeopleSoft. If this is the case, then all valid rows of the timesheet are imported.

If timesheets are imported to Project Costing and an error is encountered for a given timesheet, then only the rows in error, within that timesheet, are not loaded into PeopleSoft Project Costing. All valid rows are loaded even if they are part of the timesheet that had some errors.

Search Criteria

Select your search criteria and click the Search button to display the Summary Information and Details for Run Control ID: xxxx sections.

Summary Information

This section displays the results of a search.

Run Control ID Displays the run control used for the synchronization process.

Time Synchronization Errors Click the Error Data link to open the Details for Run Control ID: xxxx section of the page.

This link is displayed only when there are application errors and warnings associated with the timesheet data synchronization for the run control ID.

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Transform Errors Click the Error Data link to access the Transform Error Review pages that are associated with the run control ID. This link is displayed only when transform errors or warnings exist for the selected criteria.

Details for Run Control ID: xxx

Empl ID (employee identifier) Displays the employee identifier for which the error applies.

Error Message Displays error messages, warning messages, or both.

Review Status This field initially defaults to blank and is informational. No processing occurs from this field. However, you can use this field to track the status of errors.

- Select *Open* to indicate that you have seen the error and are researching it.
- Select *Fixed* to indicate that the error is fixed.

Viewing a Summary of Transformation Errors

Access the Transformation Error Review – Error Summary page (Program Management, Primavera Integration, Review Transformation Errors).

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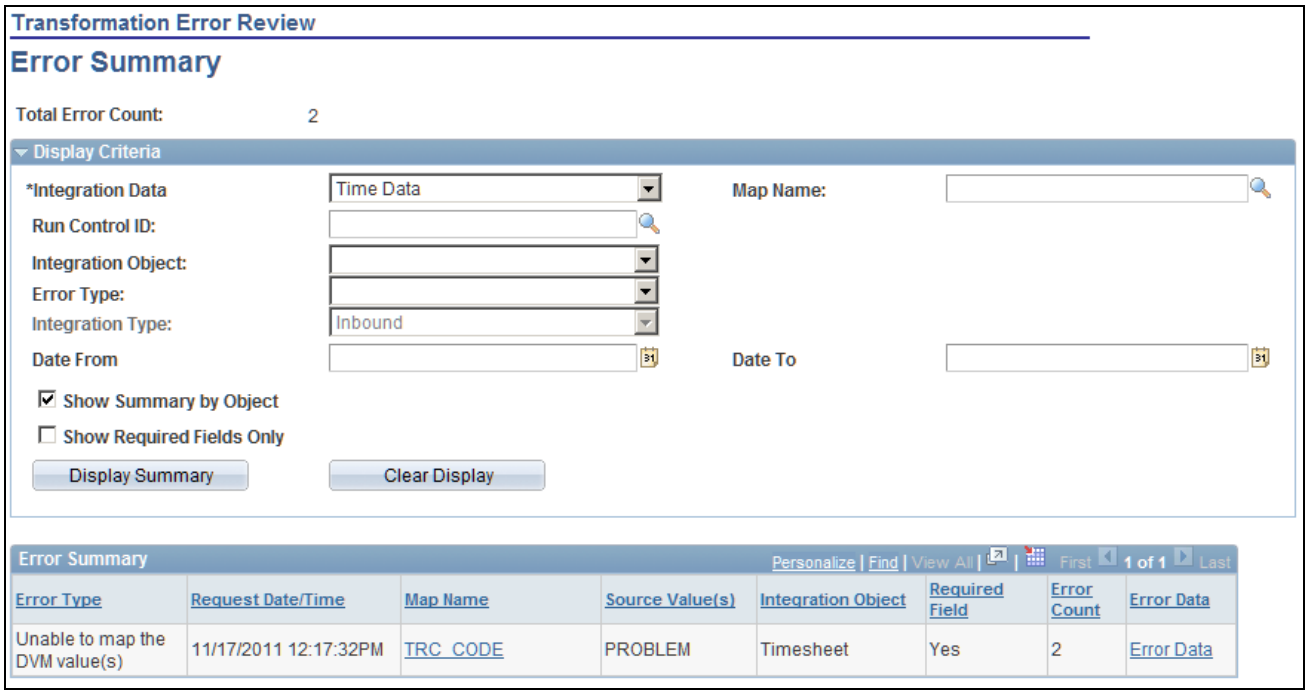

Transformation Error Review – Error Summary page

Display Criteria

Use this section to enter your search criteria and click the Display Summary button.

Integration Data Select *Master Data*,*Project Data*, or *Time Data*. The option selected in this field determines the other options that are displayed in this section, such as Project and Object ID.

Run Control ID Select a value that was used to synchronize data between PeopleSoft and Primavera P6. The options available in this field are dependent on the value selected in the Integration Data field.

Integration Object Select *Project Header*,*Activities*, *Project Budget*, *Resources*, *Resource Rates*,*Resource Assignments*, or *Timesheet*.

The options in this field are dependent on the option selected in the Integration Data field.

Error Type Select *Bypassed Due to Parent Error*, *Unable to map the DVM value(s)*, or *Unable to map the XREF*.

The options in this field are dependent on the option selected in the Integration Data field.

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Integration Type

When Project Data is selected in the Integration Data field, select *Inbound* or *Outbound.*

When Master Data is selected in the Integration Data field, this field displays *Outbound* and cannot be changed.

When Time Data is selected in the Integration Data field, this field displays *Inbound* and cannot be changed.

Map Name

Select a map name.

The options in this field are dependent on the option selected in the Integration Data field.

Show Summary by Object

Select to group the errors in the Error Summary section by integration object. This check box is selected by default.

If you deselect this check box, the system:

- Groups the errors by map name and source value.
- Clears the Integration Object field and changes it and the Show Required Fields Only option to become display only.
- Removes these columns from the Error Summary section: Integration Object, Source Record, Required Field, Error Data.

Show Required Fields Only

Select to view only errors that have a value of Yes in the Required Field column.

Error Summary

Map Name

When the error type is:

- *Unable to map the DVM:* this column is displayed as a link. Click to access the Populate Domain Value Maps page.
- *Bypassed Due to Parent Error:* this column is display only.

Source Values

When the error type is:

- *Unable to map the DVM:* this column displays the map value that is in error.
- *Bypassed Due to Parent Error:* this column displays the key values of the parent object.

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Required Field Displays *Yes* or *No,* which indicates whether the error that is logged prevented the object from being processed.

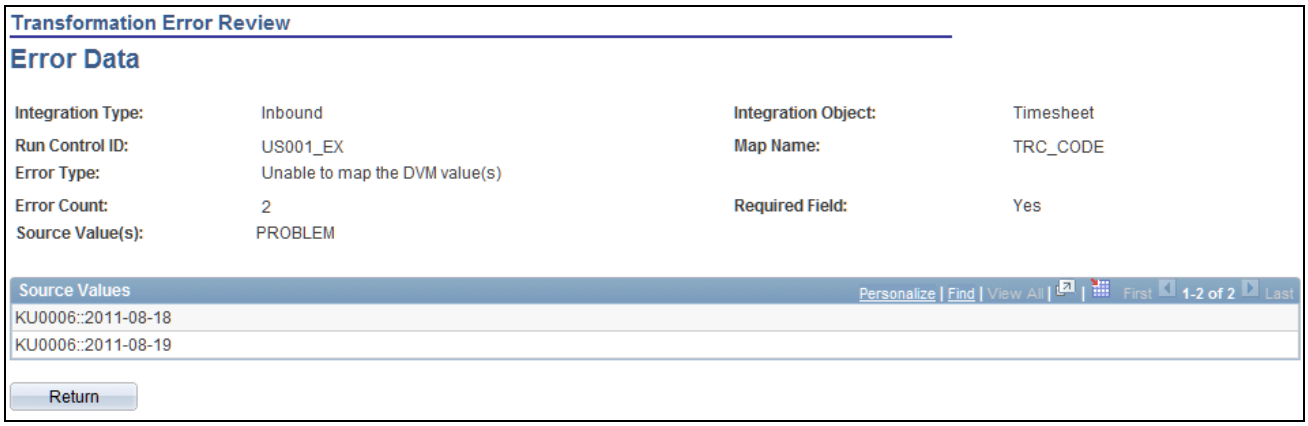
- *Yes:* indicates that a business rule, for PeopleSoft or Primavera, requires that the field be populated. The integration determined that the field was not populated and an error was logged.
- *No:* indicates that business rules, for PeopleSoft or Primavera, do not require that the field be populated and the object can be processed.

Therefore, the required field helps to determine whether a specific row in the Error Summary is a warning (Required field = No) or an actual error (Required Field = Yes) that prevented the object from being processed.

Error Data Click the Error Data link to access the Transform Error Review: Error Data page.

Viewing the Source of an Error

Access the Transformation Error Review – Error Data page (Click the Error Data link on the Transformation Error Review – Error Summary).



Transformation Error Review – Error Data

Source Values(s) (In the page header) Displays the value that caused the error or warning.

For a DVM transformation error, the source values will be the value that was not able to be transformed.

For a bypass error, this will be the values that identify the parent object as defined in the Common Elements section for object type.

For additional information about this field:

See Chapter 22, "Integrating with Primavera P6," Common Elements Used in this Section, page 459.

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Source Values (In the grid) Displays all of the object values, in detail, that are related to the Source Value(s) field in the page header. Each row in the grid represents an object that has an error or warning. The actual values are dependent on the object type.

This information helps to identify and correct the issue.

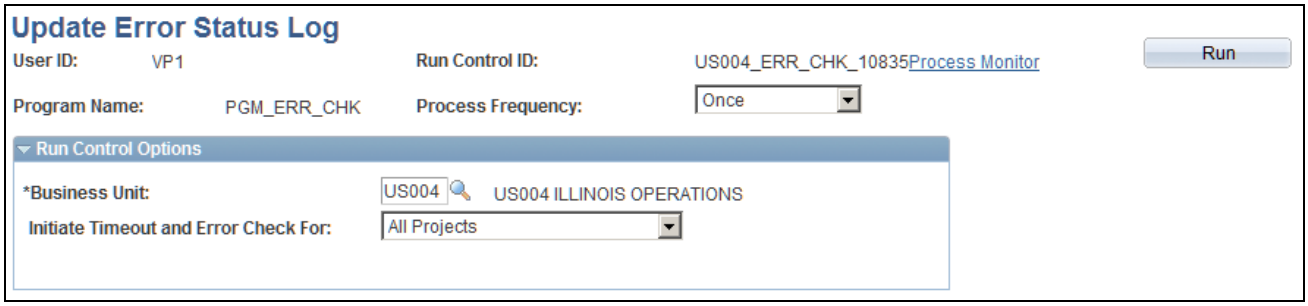
For additional information about this field:

See Chapter 22, "Integrating with Primavera P6," Common Elements Used in this Section, page 459.

Return Click to return to the Transform Error Review – Error Summary page.

Running the Error Checking Process

Access the Update Error Status Log page (Program Management, Primavera Integration, Update Error Status Log).



Update Error Status Log page

Use this page to run the Program Management Error Checking process (PGM_ERR_CHK) for PeopleSoft to Primavera P6 integration.

This process performs these tasks:

- It updates the import or export status of each object type included in the synchronization.
- It updates the overall status of the run control by considering the status of each object type.
- It checks the synchronization process for service operations that time-out or abend in the Application Engine processes.

If the master data, project data, or timesheet data synchronization process times-out and there are object types that did not receive a response from Primavera P6, then the Import From P6 Status and the Export To P6 Status fields (for the object type) are updated to *Time Out*, and the Run Control Status field is updated to *Error*. The object types are considered to be timed-out when their status is *Sending* and the synchronization date and time has elapsed. The synchronization date and time will elapse when the threshold is surpassed, which is specified in the Message Timeout(minutes) field on the Project Costing Options – Primavera page for the business unit. The *Time Out* status is displayed in the Synchronization Log pages, which indicates that the system did not receive a response and considers it to be timed-out.

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If the master data, project data, or timesheet data synchronization process abends, the system displays the Application Engine name in the Status Message column of the Project Data Sync Log page, the Master Data Sync Log page, or the Timesheet Sync Log page.

This process can also be run from the Project Data Sync Log, the Master Data Sync Log, and the Timesheet Sync Log pages by clicking on the Update Status button.

This process is automatically run by the system after synchronization completes as long as there are no communication issues or other unexpected events such as errors. In some cases the process does not appear in the Process Monitor. This process is typically scheduled to run at regular intervals to clean up processes that do not complete because of errors or other time-outs. The process can be run ad-hoc from this page if a specific process is known to have errors and the user wants the run control data updated.

When messages are received in PeopleSoft, they are not processed until all messaging for that run control has been received. If a message encounters issues with communication to and from Primavera P6, it will prevent all of the messaging that is associated with the run control from being processed. To process those messages that were received without issue, you must run the Error checking process.

If a timeout occurs, your course of action depends on what caused the timeout:

- If the synchronization process sends the messages to Integration Broker (IB) and the messages are in a *New* status but do not change to *Done,* then there is an IB issue and you will have to correct it in IB.

  When the IB issue is corrected and the IB processes the messages, the messages are sent to Primavera P6. In this case you do not need to rerun the synchronization process.

- If the synchronization process tries to send the messages to IB and the messages are not processed through IB, have a failure within Primavera P6, or have a failure receiving a response from Primavera P6, (for example the messages were not *Active*), then you should rerun the synchronization process.

Initiate Timeout and Error Check For	Select one of these options: *All*,*All Master Data*,*All Projects*,*All Time Data*, or *Specified Project.*
Project	Select a project ID. This field is available only when *Specified Project* is selected in the Initiate Timeout and Error Check For field.

Archiving Synchronized Data

The tables that are used to synchronize data are not automatically purged. Use the PeopleTools Data Archive Manager to remove records from the Synchronization log. The tables that hold:

- Project data are: P6_SYNC_HD_PROJ, P6_SYNC_LN_PROJ, and P6_SYNC_ER_PROJ.
- Master data are: P6_SYNC_HD_MST, P6_SYNC_LN_MST, and P6_SYNC_ER_MST.
- Timesheet data are: P6_SYNC_HD_TIME and P6_SYNC_ER_TIME.

You will have to create the archive and history table if you choose to use the Data Archive Manager.

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Appendix A

Configuring Batch and Online Processes

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

Configuring Temporary Tables for Batch and Online Processing

When you run Application Engine 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 that each process uses.

Specify how many temporary table instances to dedicate for each of the following Application Engine processes in PeopleSoft Program Management:

- Forecast Cache Administration (FC_CACHE_AD)
- Forecast Establish Control (FC_CTRL_LOAD)
- Forecast Populate Time (FC_HRS_LOAD)
- Forecast Variance Calculation (PC_FC_CALC)
- Projects to Forecasting (PC_PC_TO_FC)
- Load Budget from Excel (PGM_BUD_EXL)
- Send Estimate to Project Request (PGM_ES_TO_PR)
- Retrieve Estimate To Complete (PGM_ETC_GET)
- AE to load the fact table (PGM_FACT_AE)
- Enforce Team Pool Refresh (PGM_POOL_RFS)

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- Project Request Analysis (PGM_PRJRQ_AE)
- Program Refresh (PGM_PROGRFSH)
- Review Program (PGM_REVW_AE)
- Calculate Warning Indicator (PGM_SCH_EDIT)
- Show Estimate Summary (PGM_SHOW_EST)
- Distribute Costs to Budgets (PGM_SPREAD)
- Calculate Daily Workload (PGM_WLOAD_AE)

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 9.1 PeopleBook, "Optimizing General Ledger Performance"

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Appendix B

Delivered Workflows for PeopleSoft Program Management

This appendix discusses delivered workflows for:

- Project Request Approval
- Issue Management
- Activity Resource notification
- Deliverables
- Change Requests
- Program Budgeting

See Also

PeopleTools PeopleBook: Using PeopleSoft Applications PeopleBook

PeopleSoft FSCM PeopleBook: Workflow Technology

Delivered Workflows for Project Request Approval

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

See Also

Chapter 8, "Establishing Project Requests," Project Request Approval Workflow, page 94

Approval Process for Funding Department Managers

This section discusses the approval process for Funding Department Managers workflow, which includes these events:

- Preapproved.

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- Return to requester.

This workflow is active only if funding manager approval is required, which is established on the Installation Options - Program Management page (INSTALLATION_PGM).

Preapproved Description

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 that are 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

Preapproved 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 Description

Event Description	This event is triggered when a Funding Department manager clicks 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

Return to Requester Workflow Objects

Event	RETURN_REQ (Return to Requester)
Approval Rule Set	PPK_FUNDMGT_APPROVAL
Business Process	PPK_PROJ_APPR_BP

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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 Description

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 who is identified in the Approver field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to *Submitted.*
Notification Method	Worklist

Approval Process 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 Description

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 who is identified in the Requester field on the Project Request page (BC_PROJ_REQUEST1) and changes the project request status to *Returned.*
Notification Method	Worklist

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Return 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 active only 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 Description

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 who is identified in the Requester field on the Project Request page (BC_PROJ_REQUEST1).
Notification Method	Email

Approver Send Email Workflow Objects

Event	Approver Send Email
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DENY_OWNER

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Role	None

Notify Sponsor Description

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 who is 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

Notify Sponsor 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 Description

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 who is 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

Notify Project Manager Workflow Objects

Event	PRJ_MGT
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DENY_OWNER

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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 active only 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 Description

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 email notifications to the individuals who are identified in the Requester and Approver fields on the Project Request page (BC_PROJ_REQUEST1).
Notification Method	Email

Approver Send 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 Description

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 who is 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.

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Notification Method	Email

Notify Sponsor 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 Description

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 who is 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

Notify Project Manager 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.

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Description

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

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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 who is 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

Delivered Workflows for Issue Management

This section discusses the delivered Issue Management workflows, which includes these events:

- Create Issue Notification
- Assign Issue Notification
- Update Issue Notification

These workflows are active only if Issue Management workflow has been enabled on the Installation Options - Program Management page (INSTALLATION_PGM).

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Create Issue Notification Description

Event Description	Click the Submit button on the Issue page (PC_IM_ISSUE) after you save the issue.
Action Description	The system sends a worklist item and email to the issue owner.
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_ISSUE_OWNER PeopleTools generic notification template.

Create Issue Notification Workflow Objects

Event	SUBMIT
Approval Rule Set	None
Business Process	PGM_ISS_MGMT
Activity	NOTIFY_OWNER
Role	None

Assign Issue Notification Description

Event Description	The following events trigger this event: Assign a resource to an issue. Change a resource assignment for an issue.
Action Description	The system sends a worklist item and email to the assigned resource. If you change the resource that is assigned to an issue, a worklist item and email are sent to both the previously and newly assigned resources.
Notification Method	Worklist and email **Note.** The email notifications are defined in the PGM_ASSIGN_TO and PGM_REASSIGN PeopleTools generic notification templates.

Assign Issue Notification Workflow Objects

Event	SAVE
Approval Rule Set	None
Business Process	PGM_ISS_MGMT

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Activity	NOTIFY_ASSIGN_TO
Role	None

Update Issue Notification Description

Event Description	Modify the Issue Summary, Issue Description, Issue Priority, Issue Status, Resolution Description, Actual Resolution Date, Issue Notes, or Issue Attachments field in the Issue Management component (PC_IM_ISSUE) to trigger this event.
Action Description	The system sends an email to the employees who are listed on the Issue - Interested Parties page (PC_IM_INT_PRTY).
Notification Method	Email **Note.** Email notification is defined in the PGM_NOTIFY_INT_PARTIES PeopleTools generic notification template.

See Also

Chapter 13, "Managing Program and Project Issues," Issue Management Workflow, page 247

Delivered Workflow for Activity Resource Notification

This section discusses the delivered Activity Resources workflow. This workflow is active only if Activity Resource workflow has been enabled on the Installation Options - Program Management page (INSTALLATION_PGM).

Description

Event Description	Click the Notify Activity Resources button on the Resources page (PC_PRL) to trigger this workflow.
Action Description	The system sends a worklist item and email to each resource on the project team that is assigned to an activity. If the resource is on more than one activity, the resource will receive one email listing all the assigned activities.
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_ACTIVITY_ASSGN PeopleTools generic notification template.

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Workflow Objects

Event	Notify Activity Resources
Approval Rule Set	None
Business Process	PGM_ACT_ASSIGN
Activity	RES_ASSIGN
Role	None

See Also

Chapter 10, "Scheduling and Managing Resources," Understanding Resource Tools, page 143

Delivered Workflow for Deliverables

This section discusses the delivered the Deliverables workflow. This workflow is active only if Deliverables workflow has been enabled on the Installation Options - Program Management page (INSTALLATION_PGM).

Description

Event Description	The following events trigger this workflow: Assign a resource to a deliverable. Change the resource assigned to the deliverable.
Action Description	The system sends a worklist item and email to the assigned resource when you define a deliverable or you change the assigned resource on a deliverable.
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_DELIVERABLE_ASSGN PeopleTools generic notification template.

Workflow Objects

Event	SAVE
Approval Rule Set	None
Business Process	PGM_DELIV_ASSGN

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Activity	NOTIFY_DELIV_ASSIGN
Role	None

See Also

Chapter 18, "Tracking Deliverables," Understanding Deliverables, page 325

Delivered Workflows for Change Requests

This section discusses the delivered Change Request workflows, which include these events:

- Project Change Request.
- Budget Change Request.
- Estimate to Complete Change Request.

These workflows are active only if you specify that a change request is required on the Change Control Template page (PC_CHC_CFG).

See Also

Chapter 16, "Controlling Project Changes," Change Request Approval Workflow, page 282

Project Change Request Workflow

This section discusses the delivered Project Change Request workflows.

Project Change Request Approval Workflow Description

Event Description	Enter a new project change request to trigger this workflow event.
Action Description	The system sends a worklist item and email to the project manager when the requester clicks the Save and Submit button on the Project Change Request page (PGM_PRJ_CHNG_REQ).
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_CHGREQUEST_SUBMITTED PeopleTools generic notification template.

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Project Change Request Approval Workflow Objects

Event	Save and Submit
Approval Rule Set	None
Business Process	PGM_PRJCHREQ_APPR
Activity	NOTIFY_APPROVER
Role	None

Project Change Request Return Workflow Description

Event Description	Project managers trigger this event when they approve, decline, or return a change request.
Action Description	The system sends a worklist item and email to the requester indicating that the project manager approved, declined, or returned the change request.
Notification Method	Worklist and email **Note.** Email notifications are defined in the PGM_CHGREQUEST_APPROVED, PGM_CHGREQUEST_DECLINED, and PGM_CHGREQUEST_RETURNED PeopleTools generic notification templates.

Project Change Request Return Workflow Objects

Event	Return
Approval Rule Set	None
Business Process	PGM_PRJCHREQ_APPR
Activity	NOTIFY_REQUESTOR
Role	None

Budget Change Request Workflow

This section discusses the delivered Budget Change Request workflows.

Budget Change Request Approval Workflow Description

Event Description	Enter a new budget change request to trigger this workflow event.

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Action Description	The system sends a worklist item and email to the budget approver when the requester clicks the Save and Submit button on the Budget Change Request page (PGM_BGT_CHC_REQ).
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_CHGREQUEST_SUBMITTED PeopleTools generic notification template.

Budget Change Request Approval Workflow Objects

Event	Save and Submit
Approval Rule Set	None
Business Process	PGM_BUDCHREQ_APPR
Activity	NOTIFY_BUDCHREQ_APPR
Role	None

Budget Change Request Return Workflow Description

Event Description	Budget approvers trigger this event when they approve, decline, or return a change request.
Action Description	The system sends a worklist item and email to the requester indicating that the budget approver approved, declined, or returned the change request.
Notification Method	Worklist and email **Note.** Email notifications are defined in the PGM_CHGREQUEST_APPROVED, PGM_CHGREQUEST_DECLINED, and PGM_CHGREQUEST_RETURNED PeopleTools generic notification templates.

Budget Change Request Return Workflow Objects

Event	Return
Approval Rule Set	None
Business Process	PGM_BUDCHREQ_APPR
Activity	NOTIFY_BUDCHG_REQUESTOR
Role	None

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Estimate to Complete Change Request Workflow

This section discusses the delivered Estimate to Complete Change Request workflow.

Estimate to Complete Approval Workflow Description

Event Description	Enter a value in the New Estimate field on the Time Report Details page (TE_TIMELINES) to trigger this workflow.
Action Description	The system sends a worklist item and email to the project manager.
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_CHGREQUEST_SUBMITTED PeopleTools generic notification template.

Estimate to Complete Approval Workflow Objects

Event	SUBMIT
Approval Rule Set	None
Business Process	PGM_CHGREQETC_APPR
Activity	PGM_AUTONOTIFY_APPROVER
Role	None

Delivered Workflows for Program Budgeting

This section discusses the delivered Program Budgeting workflows. These workflows are active only if Program Budgeting workflow is enabled on the Installation Options - Program Management page (INSTALLATION_PGM).

Program Budgeting Approval Workflow Description

Event Description	A user enters a program budget plan.
Action Description	The system sends a worklist item and email to the budget approver.
Notification Method	Worklist and email **Note.** Email notification is defined in the PGM_BUD_SUBMIT PeopleTools generic notification template.

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Program Budgeting Approval Workflow Objects

Event	Submit for Approval
Approval Rule Set	None
Business Process	PGM_BUD_APPROVE_BP
Activity	PGM_BUD_SUBMIT
Role	None

Program Budgeting Approved Return Workflow Description

Event Description	The budget approver approves the program budget plan.
Action Description	The system sends an email to the user who entered the program budget plan indicating that the budget approver either approved or returned the program budget plan.
Notification Method	Email **Note.** Email notifications are defined in the PGM_BUD_APPROVE and PGM_BUD_RETURN PeopleTools generic notification templates.

See Also

Chapter 12, "Budgeting for Programs," Program Budget Workflow, page 224

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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 with your online documentation.

See Also

PeopleTools PeopleBook: PeopleSoft Process Scheduler

PeopleSoft Program Management Reports: A to Z

This table lists the PeopleSoft Program Management reports, sorted alphanumerically by report ID.

Report ID and Report Name	*Description*	*Navigation*	*Run Control Page*
PCY1044- Forecast Labor Cost Variance	Compare forecasted labor costs to the budgeted labor costs for one or more projects that are forecasted at the project and activity level.	Program Management, Reports, Forecasting, Forecast Labor Cost	RUN_PCY1044
PCY1046- Forecast Labor Revenue Variance	Compare forecasted labor revenue to budgeted labor revenue for projects that are forecasted at the project and activity level.	Program Management, Reports, Forecasting, Forecast Labor Revenue	RUN_PCY1046
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

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Report ID and Report Name	Description	Navigation	Run Control Page
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 13, "Managing Program and Project Issues," Generating Issue Reports, page 257

Appendix C, "PeopleSoft Program Management Reports," RUN_PCY1044 and RUN_PCY1046 - Forecast Labor Variance Reports, page 502

PeopleSoft Program Management Reports: Selected Reports

This section contains detailed information that pertain to these reports:

- RUN_PCY1044
- RUN_PCY1046

RUN_PCY1044 and RUN_PCY1046 - Forecast Labor Variance Reports

The Forecast Variance Calculation Application Engine process (PC_FC_CALC) calculates projected variances for labor costs and revenue for projects that are forecasted at the activity level. The process converts all amounts to the project business unit currency and presents the data in two reports, one for labor cost variance (RUN_PCY1044) and one for labor revenue variance (RUN_PCY1046). You can analyze variances by activity and project.

The reports use information from these tables:

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- Forecasted hours are from the Forecast Header record (FC_TIME_HDR) and Forecast Time Detail record (FC_TIME_DTL) for the most recent prior forecast horizon.
- Cost rates and bill rates are based on the Standard Rate option on the Program Management Options page for the business unit, or the Program Management Defaults page for the project. Rates are derived from the:
    - Rates by Employee record (PC_RATE_EMPL) if standard rates are based on employees.
    - Rates by Job Code record (PC_RATE_JOBC) if standard rates are based on job codes.
    - Rates by Role record (PC_RATE_ROLE) if standard rates are based on project roles.
- Actual costs are from the Project Summary record (PC_SUMMARY_TBL) for analysis types that belong in the cost analysis group.
- Budgeted costs are from the Project Summary record for analysis types that belong in the budget analysis group.
- Revenue amounts are from the Project Summary record for analysis types that belong in the revenue analysis group.
- All calculated amounts are stored in the Forecast Variance Report temporary table (PC_FORECAST_TAO) that is used to format the reports.

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