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# PeopleSoft EPM 9.1: Project Portfolio Management

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June 2013

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PeopleSoft EPM 9.1: Project Portfolio Management  
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# Preface.

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## Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft Applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

### PeopleSoft Hosted Documentation

You access the PeopleSoft Online Help on Oracle's PeopleSoft Hosted Documentation website, which enables you to access the full help website and context-sensitive help directly from an Oracle hosted server. The hosted documentation is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support, because that documentation is now incorporated into the hosted website content. The Hosted Documentation website is available in English only.

### Locally Installed Help

If your organization has firewall restrictions that prevent you from using the Hosted Documentation website, you can install the PeopleSoft Online Help locally. If you install the help locally, you have more control over which documents users can access and you can include links to your organization's custom documentation on help pages.

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

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**Note:** Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

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### Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

### Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: PeopleSoft Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft Applications.

## Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

## Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</i>
<b>Bold</b>	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply.  Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> .
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
Monospace font	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<b>Typographical Convention</b>	<b>Description</b>
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (   ).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.  Ampersands also precede all PeopleCode variables.
=>	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

## ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY\_CD\_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY\_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

## Region and Industry Identifiers

Information that applies only to a specific region or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

### Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America

- North America

## Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in the PeopleSoft Online Help:

- USF (U.S. Federal)
- E&G (Education and Government)

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## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Using and Managing the PeopleSoft Online Help

Click the Help link in the universal navigation header of any page in the PeopleSoft Online Help to see information on the following topics:

- What's new in the PeopleSoft Online Help.
- PeopleSoft Online Help accessibility.
- Accessing, navigating, and searching the PeopleSoft Online Help.
- Managing a locally installed PeopleSoft Online Help website.

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## PeopleSoft EPM Related Links

[My Oracle Support](#)

[PeopleSoft Information Portal on Oracle.com](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

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Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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## Chapter 1

# Getting Started with Project Portfolio Management

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## Project Portfolio Management Overview

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

Project Portfolio Management enables your organization to:

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

### Related Links

[Project Portfolio Management](#)

---

## Project Portfolio Management Business Processes

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

- Create project requests and submit for approval.
  - Route project requests to the parties who are responsible for operationally and financially authorizing the initiation of a project or program.

- Create bottoms-up business case justifications for a project or program.
- Strategically analyze project requests.
  - Evaluate high-level resource and budget constraints.
  - Compare and evaluate return on investment, present value, risks, and benefits.

We discuss these business processes in the business process topics in this Product Documentation.

---

## Project Portfolio Management Integrations

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

- Scorecard.
- Planning and Budgeting.

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

We discuss integration considerations in the implementation topics in this Product Documentation.

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

### Related Links

[Establishing System Options and Security](#)

[Understanding Integration with Program Management](#)

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## Security Considerations

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

See [Security Page](#).

See "Understanding EPM Security and Setups (*PeopleSoft 9.1: Enterprise Performance Management Fundamentals*)".



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## Project Portfolio Management Implementation

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

### Other Sources of Information

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

See the product documentation for *PeopleTools: PeopleSoft Setup Manager*

*PeopleTools: PeopleSoft Component Interfaces*



## Chapter 2

# Understanding Project Portfolio Management

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## Project Portfolio Management

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

---

## Main Components

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

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

## Scorecards

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

## Strategy Components

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

## Key Performance Indicators

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

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

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

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

### Related Links

[Understanding Project Portfolio Management KPIs](#)

## Project Requests

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

## Related Links

[Understanding the Project Request Component](#)

## Portfolios

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

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

## Related Links

[Analyzing Project Portfolios](#)

## Business Units

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

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

---

## Important Data Tables

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

<i>Tables</i>	<i>Type of Data</i>
BC_ASSESS_F00	Scorecard assessments.
KP_DATAVALS_F00	KPI data element values.
KP_KPI_ASMT_F00	KPI assessment results.
KP_KPI_CALC_F00	Calculated KPI values.
KP_KPI_OVRD_F00	KPI assessment override information.
KP_OBJ_RULE_F00	KPI dimension members defined by a rule.
KP_TRGTVALS_F00	KPI target values.
BC_PROJ_REQUEST	Project requests.
PPK_PROJREQ_AUD	Project request status change audit trail.

<b>Tables</b>	<b>Type of Data</b>
BC_COST_EST	Project request estimated costs.
BC_BENFT_EST	Project request estimated benefits.
BC_PRJREQST_DPN	Project request project dependencies.
BC_PRJREQST_MST	Project request milestones.
BC_PROJ_SCR	Project request score groups.
PPK_PR_SCR_RC	Project request risk categories.
BC_PROJ_SCR_CMP	Project request score categories.
PPK_PR_RISK_ELM	Project request risk elements.
BC_PROJ_ATTACH	Project request attachments.
PPK_TOT_COST	Project request budget approval.
PPK_MST_TBL	Milestones.
PPK_RISK_TBL	Risk elements.

---

## Application Engine Processes

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

- The Scorecard Assessment Application Engine process (BC\_ASSESS).  
This process calculates and assesses key performance indicators and strategy components. The delivered jobstream is BC\_ANALYZE.
- The Update Milestone Probabilities Application Engine process (PPK\_UPD\_MST)  
This process updates risk milestones.

### Related Links

[Understanding Project Portfolio Management Processes and Utilities](#)

---

## Process Flow

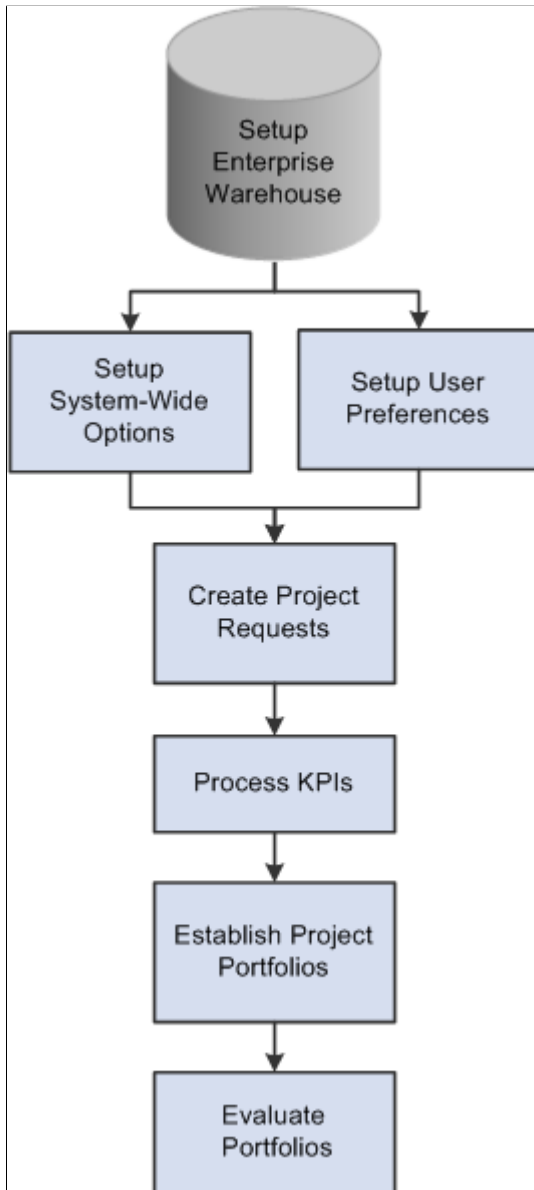
The main tasks that you perform while using Project Portfolio Management are:

1. Setting up the Enterprise Performance Management foundation.
2. Establishing system-wide options and user preferences.

3. Creating project requests and submitting them for approval.
4. Running the Scorecard Assessment process to calculate and assess KPIs.
5. Creating project portfolios.
6. Reviewing and analyzing project portfolios.

**Image: Project Portfolio Management task overview**

The following diagram shows these tasks:



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

---

## Integration

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

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

### Related Links

[Integration Page](#)



## Chapter 3

# Setting Up Project Portfolio Management

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## Understanding Project Portfolio Management Options

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

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

### System Options

The system options are application-wide settings that:

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

### Supporting Data

The supporting data that you define establishes:

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

## User Preferences for Portfolio Analysis

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

---

## Establishing System Options and Security

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

This section discusses how to:

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

## Pages Used to Establish System Options and Security

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
PPM Prompt Tables	BC_SETUP_PROMPT	Project Portfolio Management, Administration, PPM Preferences, PPM Prompt Tables	Specify which tables the system uses to prompt for department and account data.
Project Request ID Sequencing	BC_PM_OPTIONS	Project Portfolio Management, Administration, PPM Preferences, Project Request ID Sequencing	Specify how to generate project request IDs.
Discount Rate	PPK_DISC_RATE	Project Portfolio Management, Administration, PPM Preferences, Discount Rate	Specify the discount rate to use to calculate monetary values such as net present value and return on investment.
Conversion Rate Type	PPK_RT_TYPE	Project Portfolio Management, Administration, PPM Preferences, Conversion Rate Type	Specify which rate type the system should use to convert currency amounts.

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Workflow Options	PPK_WF_OPTIONS	Project Portfolio Management, Administration, PPM Preferences, Workflow Options	Establish application-level workflow options for project request approvals.
Integration	PPK_PG_SETUP	Project Portfolio Management, Administration, PPM Preferences, Integration	Specify whether to integrate Project Portfolio Management with PeopleSoft Program Management.
Analysis Dimensions	PPK_DIM_LIST	Project Portfolio Management, Administration, PPM Preferences, Analysis Dimensions	Specify the fields to use as dimensions for portfolio analysis.
Security	BC_PROJ_ROL_ST_VW	Project Portfolio Management, Administration, Security	Review security for projects and templates by role and status.
Privileges for Project Requests and Templates	BC_PROJ_ROL_ST	Click Add Role or click a role name on the Security page.	Specify security for project requests and templates by role and status.

## PPM Prompt Tables

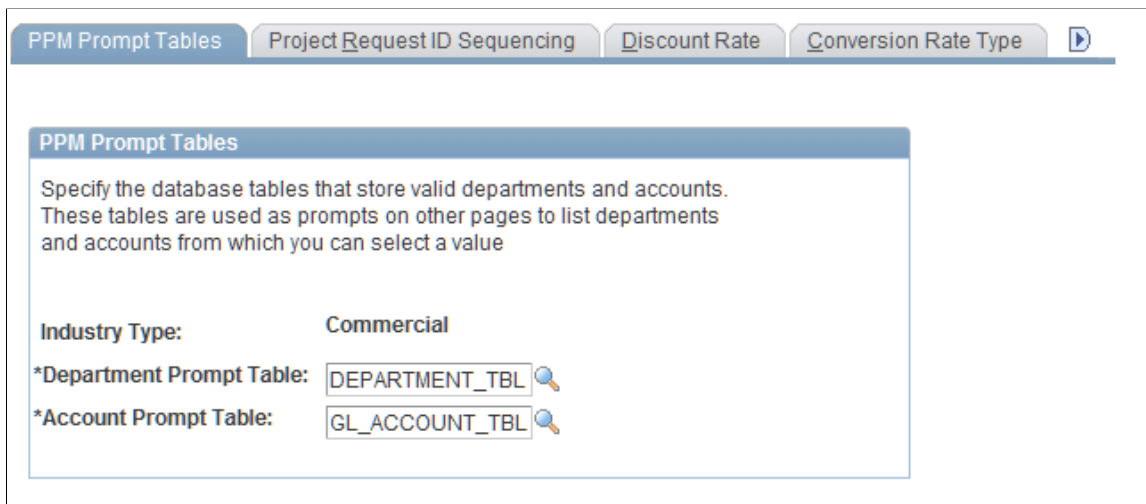
Use the PPM Prompt Tables page (BC\_SETUP\_PROMPT) to specify which tables the system uses to prompt for department and account data.

### Navigation

Project Portfolio Management, Administration, PPM Preferences, PPM Prompt Tables

### Image: PPM Prompt Tables page

This example illustrates the fields and controls on the PPM Prompt Tables page. You can find definitions for the fields and controls later on this page.



### Department Prompt Table

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

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

The record that you enter must be keyed by setID and contain a DESCR field.

---

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

---

### Account Prompt Table

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

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

---

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

---

## Project Request ID Sequencing

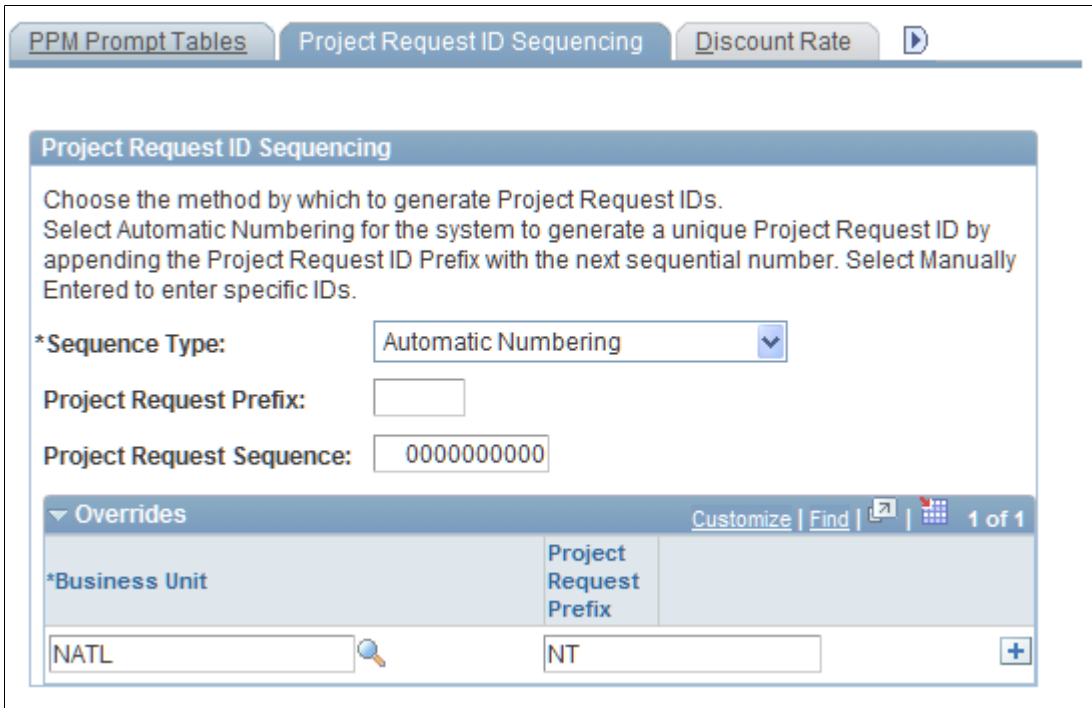
Use the Project Request ID Sequencing page (BC\_PM\_OPTIONS) to specify how to generate project request IDs.

### Navigation

Project Portfolio Management, Administration, PPM Preferences, Project Request ID Sequencing

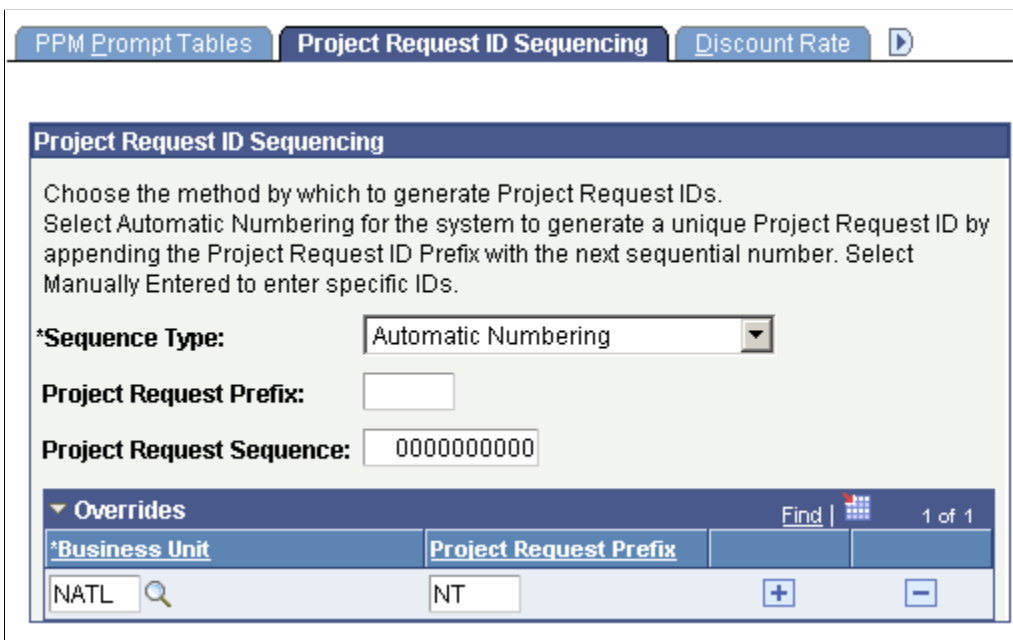
#### Image: Project Request ID Sequencing page

This example illustrates the fields and controls on the Project Request ID Sequencing page. You can find definitions for the fields and controls later on this page.



#### Image: Project Request ID Sequencing page

This example illustrates the fields and controls on the Project Request ID Sequencing page. You can find definitions for the fields and controls later on this page.



## Project Request ID Sequencing

### Sequence Type

Specify how project request IDs are assigned. Options are:

*Automatic Numbering:* Select to have the system automatically generate unique project request IDs for new project requests by adding the project request ID prefix to the beginning of the next number in sequence after the value that appears in the Project Request ID Sequence field.

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

### Project Request Prefix

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

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 Request Sequence

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

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

---

**Note:** Although you can edit the Project Request Sequence field, you should not change it after project requests exist because doing so could cause project request ID conflicts. Also, project request IDs must be unique throughout the system, regardless of the business unit with which they are associated, to integrate with PeopleSoft Project Costing.

---

## 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*.

## Discount Rate

Use the Discount Rate page (PPK\_DISC\_RATE) to specify the discount rate to use to calculate monetary values such as net present value and return on investment.

## Navigation

Project Portfolio Management, Administration, PPM Preferences, Discount Rate

### Image: Discount Rate page

This example illustrates the fields and controls on the Discount Rate page. You can find definitions for the fields and controls later on this page.

*Effective Date	*Discount%
01/01/1900	1.50

#### Discount% (discount percentage)

Enter the rate that the system can use to discount the project request cost and benefit amounts to calculate financial metrics. The system uses this rate when calculating the KPI values for present value of benefits, return on investment, and net present value.

#### Effective Date

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

## Conversion Rate Type

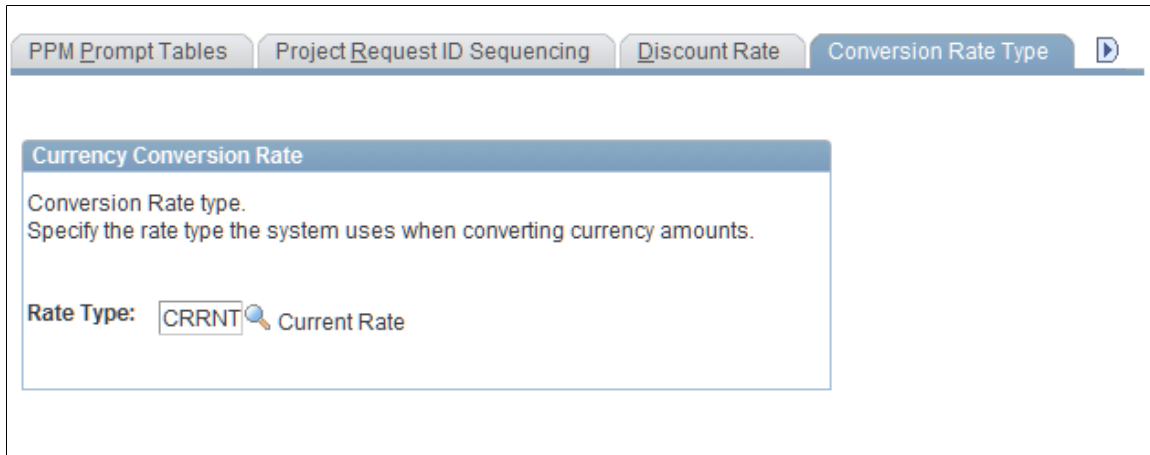
Use the Conversion Rate Type page (PPK\_RT\_TYPE) to specify which rate type the system should use to convert currency amounts.

## Navigation

Project Portfolio Management, Administration, PPM Preferences, Conversion Rate Type

### Image: Conversion Rate Type page

This example illustrates the fields and controls on the Conversion Rate Type page. You can find definitions for the fields and controls later on this page.



#### Rate Type

Select the rate type to use for currency conversions.

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

## Related Links

[Converting Currency](#)

## Workflow Options

Use the Workflow Options page (PPK\_WF\_OPTIONS) to establish application-level workflow options for project request approvals.

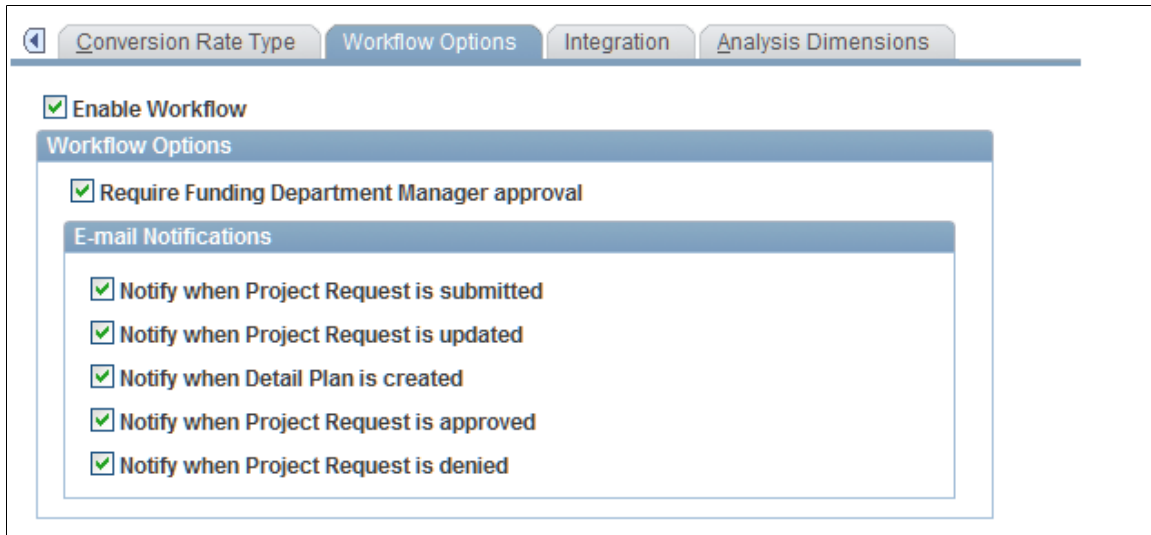


## Navigation

Project Portfolio Management, Administration, PPM Preferences, Workflow Options

### Image: Workflow Options page

This example illustrates the fields and controls on the Workflow Options page. You can find definitions for the fields and controls later on this page.



#### Enable Workflow

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

## Workflow Options

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

#### Require Funding Department Manager approval

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

---

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

---

## Email Notifications

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

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

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

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

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

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

## Related Links

[Approval Workflow](#)

## Integration Page

Use the Integration page (PPK\_PG\_SETUP) to specify whether to integrate Project Portfolio Management with PeopleSoft Program Management.

### Navigation

Project Portfolio Management, Administration, PPM Preferences, Integration

#### Image: Integration page

This example illustrates the fields and controls on the Integration page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web interface with a navigation bar at the top containing four tabs: 'Conversion Rate Type', 'Workflow Options', 'Integration', and 'Analysis Dimensions'. The 'Integration' tab is selected. Below the navigation bar, there are two main sections. The first section, titled 'Integration Setup', contains a checkbox labeled 'PeopleSoft Program Management Enabled' which is checked. The second section, titled 'Current Portal', contains several input fields: 'Market' is a dropdown menu set to 'Global'; 'Portal Name' is a text box containing 'EMPLOYEE' with a search icon; 'Xfer Node Name' is a text box containing 'ERP' with a search icon; 'Menu Name' is a text box containing 'CREATE\_PROJECTS'; 'Component ID' is a text box containing 'PROJECT\_GENERAL'; and 'Page Name' is a text box containing 'PROJECT\_GEN\_01A'.

#### Image: Integration page

This example illustrates the fields and controls on the Integration page. You can find definitions for the fields and controls later on this page.

This screenshot is identical to the one above, showing the 'Integration' page. The navigation bar at the top has five tabs: 'Discount Rate', 'Conversion Rate Type', 'Workflow Options', 'Integration', and a right-pointing arrow. The 'Integration' tab is selected. The 'Integration Setup' section shows the 'PeopleSoft Program Management Enabled' checkbox checked. The 'Current Portal' section contains the same input fields as the previous screenshot: 'Market' (Global), 'Portal Name' (EMPLOYEE), 'Xfer Node Name' (ERP), 'Menu Name' (CREATE\_PROJECTS), 'Component ID' (PROJECT\_GENERAL), and 'Page Name' (PROJECT\_GEN\_01A).

## Integration Setup

### PeopleSoft Program Management Enabled

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

---

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

---

## Current Portal

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

<b>Market</b>	Select the market category for the portal application.
<b>Portal Name</b>	Select the portal name.
<b>Xfer Node Name (transfer node name)</b>	Select the transfer node.
<b>Menu Name, Component ID, and Page Name</b>	Enter the names for the menu, component, and page to access when your users click the Project ID link on the Project Request page.

See the product documentation for *PeopleTools: Portal Technology*

## Analysis Dimensions page

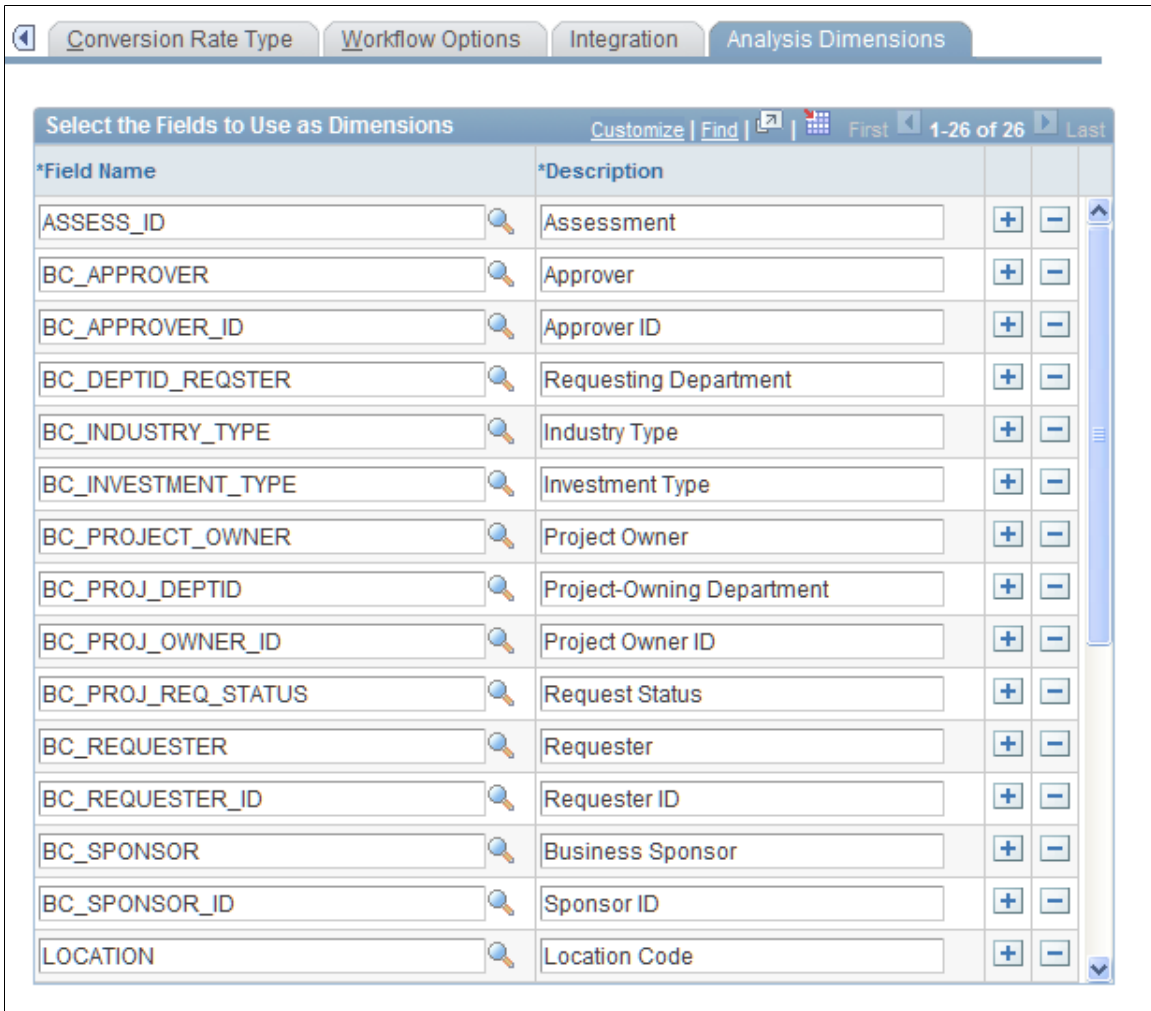
Use the Analysis Dimensions page (PPK\_DIM\_LIST) to specify the fields to use as dimensions for portfolio analysis.

### Navigation

Project Portfolio Management, Administration, PPM Preferences, Analysis Dimensions

### Image: Analysis Dimensions page

This example illustrates the fields and controls on the Analysis Dimensions page. You can find definitions for the fields and controls later on this page.



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

### Security Page

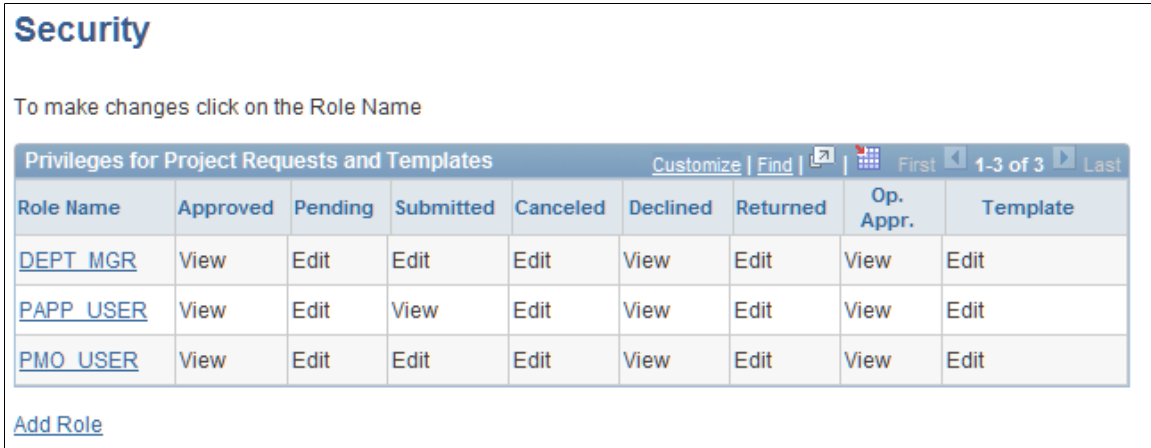
Use the Security page (BC\_PROJ\_ROL\_ST\_VW) to review security for projects and templates by role and status.

### Navigation

Project Portfolio Management, Administration, Security

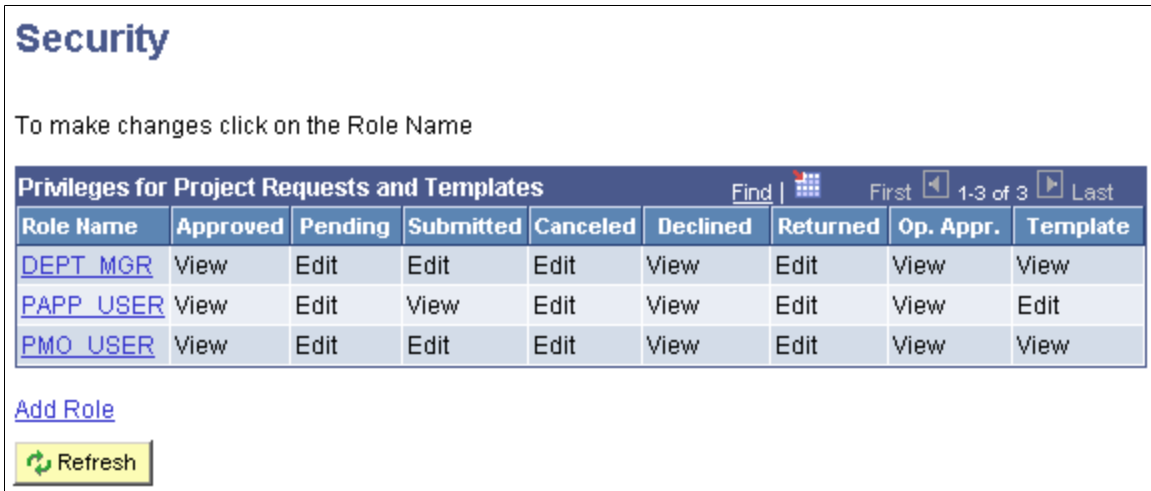
### Image: Security page

This example illustrates the fields and controls on the Security page. You can find definitions for the fields and controls later on this page.



### Image: Security page

This example illustrates the fields and controls on the Security page. You can find definitions for the fields and controls later on this page.



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

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

---

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

---

**Add Role**

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

**<Role Name>**

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

**Privileges for Project Requests and Templates page**

Use the Privileges for Project Requests and Templates page (BC\_PROJ\_ROL\_ST) to specify security for project requests and templates by role and status.

**Navigation**

Click Add Role or click a role name on the Security page.

**Image: Privileges for Project Requests and Templates page**

This example illustrates the fields and controls on the Privileges for Project Requests and Templates page. You can find definitions for the fields and controls later on this page.

**Privileges for Project Requests and Templates**

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

Select Status for which Project Request can be edited

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

Edit Project Request Templates

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

**Edit Page**

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

---

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

---

**Edit Project Request Templates**

Select to permit this role to edit project request templates.

**View Privileges for All Roles**

Click to view a list of roles with defined privileges.

**Delete Privileges of this Role**

Click to delete this role's edit privileges.

**Related Links**[Understanding the Project Request Component](#)

---

## Establishing Supporting Data

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

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

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

## Pages Used to Establish Supporting Data

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



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

## Understanding Milestones

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

- Standard milestones.
- Risk milestones.

### Standard Milestones

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

### Risk Milestones

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

You can define the level of confidence that a risk milestone will be completed on schedule as a percentage value between 0 and 100; this percentage is used when the system computes the project's net relative

risk score. Optionally, you can have the system automatically update the probability that a risk milestone will occur based on changes to its status, start date, and due date by running the Update Milestone Probabilities Application Engine process. This option is set individually for each risk milestone when you establish the milestone.

## Related Links

[Determining Project Request Scores and Managing Risks](#)

## Understanding Measures and Dimensions

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

### Measures

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

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

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

- *Best.*

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

- *Most Often.*

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

- *None.*

No assessments are available for summary nodes.

- *Rollup Score.*

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

- *Worst Case.*

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

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

## Dimensions

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

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

## Related Links

[Analyzing Project Portfolios](#)

## Department Budget Source page

Use the Department Budget Source page (BC\_PRBUD\_FLT) to indicate which database records contain budget data.

This information is used to determine the departmental budget amount that is allowed for project requests.

### Navigation

Project Portfolio Management, Administration, Building Blocks, Department Budget Source

### Image: Department Budget Source page

This example illustrates the fields and controls on the Department Budget Source page. You can find definitions for the fields and controls later on this page.

### Department Budget Source

\*Record (Table) Name:

\*Amount Field:

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

Filter Criteria						Customize   Find    First 1 of 1 Last
Open Brackets	Field Name	Comparison Operator	Value	Close Bracket	Relationship to other Criteria	
▼	<input type="text" value="ACCOUNT"/>	Like ▼	<input type="text" value="615"/>	▼	▼	+ -

## Budget Data

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

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

## (Optional) Filter Criteria

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

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

## Priorities Page

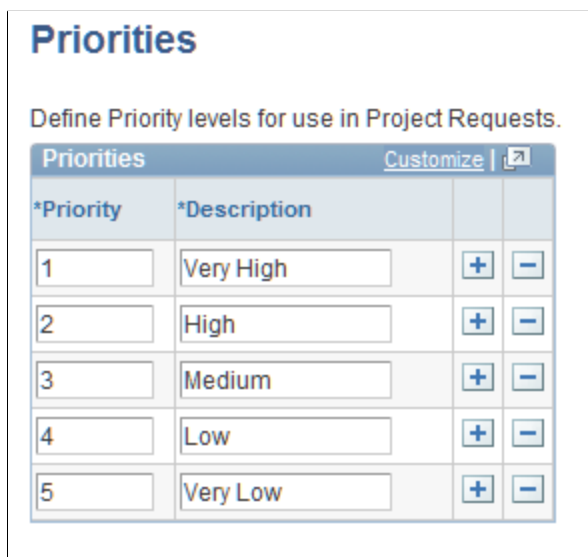
Use the Priorities page (PPK\_PRIORITY\_UPD) to establish priority ratings to assign to project requests.

### Navigation

Project Portfolio Management, Administration, Building Blocks, Priorities

### Image: Priorities page

This example illustrates the fields and controls on the Priorities page. You can find definitions for the fields and controls later on this page.



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

## Initiative Types

Use the Initiative Type page (PPK\_INITYPE\_TBL) to set up unique identifiers that map different types of project requests to specific project owners.

### Navigation

Project Portfolio Management, Administration, Building Blocks, Initiative Types

### Image: Initiative Type page

This example illustrates the fields and controls on the Initiative Type page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Initiative Type' page with the following details:

- SetID:** SHARE
- Initiative Type ID:** FACILITIES
- Initiative Type Definition:** Find | View All | First | 1 of 1 | Last
- \*Effective Date:** 01/01/1900 (with a calendar icon)
- \*Status:** Active (with a dropdown arrow)
- \*Description:** Facilities Management
- \*Owner ID:** VP5 (with a magnifying glass icon)

### Initiative Type ID

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

### Owner ID

Select the individual that is associated with this initiative type.

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

## Milestone Page

Use the Milestone page (PPK\_MILESTONE) to establish milestones.

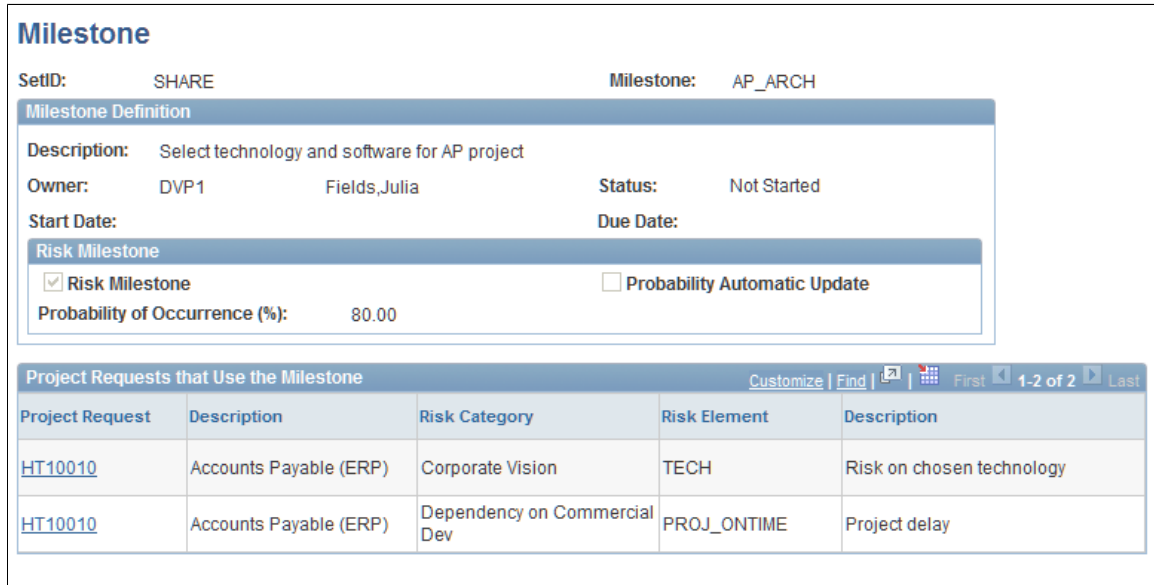
**Navigation**

- Project Portfolio Management, Administration, Building Blocks, Milestones
- Project Portfolio Management, Project Requests, Project Requests, Milestones

Click Create New Milestone.

**Image: Milestone page**

This example illustrates the fields and controls on the Milestone page. You can find definitions for the fields and controls later on this page.



**Milestone Definition**

**Owner**

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

**Status**

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

**Start Date**

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

**Due Date**

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

**Delete**

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

## Risk Milestone

### Risk Milestone

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

### Probability Automatic Update

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

This field is available for entry only when Risk Milestone is selected.

### Probability of Occurrence (%)

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

## Project Requests that Use the Milestone

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

### Project Request

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

## Related Links

[Understanding Project Portfolio Management Processes and Utilities](#)

[Understanding the Project Request Component](#)

## Risk Elements

Use the Risk Element page (PPK\_RISK\_ELEMENT) to establish risk elements.

### Navigation

Project Portfolio Management, Administration, Building Blocks, Risk Elements

### Image: Risk Element page

This example illustrates the fields and controls on the Risk Element page. You can find definitions for the fields and controls later on this page.

**Risk Element**

Risk Element: FUNDING

\*Description:

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

## Defining Measures and Dimensions

Use the Define Measures/Dimensions page (BC\_PRJ\_KPI\_RULE) to establish the data that is available to use when you are analyzing project portfolios.

### Navigation

Project Portfolio Management, Administration, Building Blocks, Measures/Dimensions

### Image: Define Measures/Dimensions page

This example illustrates the fields and controls on the Define Measures/Dimensions page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Define Measures/Dimensions' page with the following fields and values:

- Measure/Dimension:** RISK
- Description:** Project Risk
- Source Dimension:** Dimension (checkbox selected), Project Count (checkbox not selected)
- Source Measure:** PM\_RISK (with search icon), Project Risk
- Rollup Using:** Weighting (dropdown)
- Weighted By:** PM\_ESTCOST (with search icon), Estimated Cost
- Assess Using:** Best Case (dropdown)
- Tie Breaker:** (empty dropdown)

### Dimension and Source Dimension

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

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

### Project Count

Select this option to return the number of project requests.

When this option is selected, the only other required fields are Description and ID. The remaining fields are unavailable for entry.

### Source Measure

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

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

### Rollup Using

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



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

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

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

**Weighted By**

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

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

**Assess Using**

Indicate the method by which the system determines the assessments at each summary node of the project portfolio tree.

**Tie Breaker**

Specify the assessment to assign if the assessments for summary nodes are determined by the most common assessment result and no single assessment was received more often than any others. This field is available for entry only when the *Assess Using* field is set to *Most Frequent*. Options are:

*Best Case:* Select to use the best assessment result.

*Worst Case:* Select to use the worst assessment result.

**Assessment Rules**

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

**Sequence**

Enter a number to associate with each target rule. The rules are evaluated in ascending order based on this sequence number, not their order in the list. The row that contains the first true condition is used as the assessment. Leave intervals between your sequence numbers so that you can insert additional rules later, if necessary, without having to renumber each row.

**Operator**

Select the type of comparison (greater than, less than, and so on).

**% of Target (percentage of target)**

Select the percentage of the KPIs target value to which this rule applies.

**Assessment ID**

Select the assessment ID that is used when the condition is true.

## Establishing Portfolio Analysis Preferences

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

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

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

### Pages Used to Establish Portfolio Analysis Preferences

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

### Understanding Portfolio Analysis Preferences

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

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

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

#### Related Links

[Analyzing Project Portfolios](#)

### Portfolio Analysis Defaults Page

Use the Portfolio Analysis Defaults page (BC\_PRJ\_KPI\_DFLT) to specify, by user, the default business unit, scenario, portfolio tree, and time period to use for portfolio analysis.

## Navigation

Project Portfolio Management, Administration, User Portfolio Preferences, Portfolio Analysis Defaults

### Image: Portfolio Analysis Defaults page

This example illustrates the fields and controls on the Portfolio Analysis Defaults page. You can find definitions for the fields and controls later on this page.

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

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

## Additional Portfolio Measures page

Use the Additional Portfolio Measures page (PPK\_ADDL\_MSRS) to specify, by user, up to four additional measures to view on the Portfolio Analysis page.

## Navigation

Project Portfolio Management, Administration, User Portfolio Preferences, Additional Portfolio Measures

### Image: Additional Portfolio Measures page

This example illustrates the fields and controls on the Additional Portfolio Measures page. You can find definitions for the fields and controls later on this page.

	VP of Corporate Planning	VP1
Additional Measure 1:	<input type="text" value="RISK"/>	<input type="text" value="Project Risk"/>
Additional Measure 2:	<input type="text" value="PAYBACK"/>	<input type="text"/>
Additional Measure 3:	<input type="text"/>	<input type="text"/>
Additional Measure 4:	<input type="text"/>	<input type="text"/>

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

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

See [Defining Measures and Dimensions](#).

## Chapter 4

# Establishing Project Requests

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## Understanding the Project Request Component

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

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

## Templates

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

Templates differ from project requests in the following ways:

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

To maintain templates, use the Project Request component pages. When accessing the search page for the Project Request component, select the Template check box to add, update, or view a template instead of a project request. The settings that are established by using the Privileges for Project Requests and Templates page control who can create and update templates. If a user is granted edit privileges for templates, that user can create a new template or update an existing template by selecting the Template

check box when accessing the Project Request component pages. If a user has view-only privileges for templates, then the Template check box does not display in Add mode, because that user can create only project requests, not templates. In Update/Display mode, that user can select the Template check box to view an existing template. The user is not able to save any changes to the template, however, they can save it as a new project request, and then modify it.

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

## Versions

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

## Costs and Benefits

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

### Related Links

[Defining Estimated Costs and Benefits](#)

## Milestones

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

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

### Related Links

[Understanding Milestones](#)

[Milestone Page](#)

## Scores

Score groups enable you to associate objectives and risks with a project request for the purpose of generating scores that indicate how well the project request meets the objectives or how much it is at risk.

These scores provide a comparative measurement for all of the project requests within a given portfolio and help determine which project requests to approve.

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

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

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

## Related Links

[Determining Project Request Scores and Managing Risks](#)

## Approval Workflow

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

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

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

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

The system initially sets the status to *Pending*.

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

The system updates the status to *Submitted*.

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

The approver selects one of these options:

## Approve

Approves (or operationally approves) the project request.

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

- If funding department manager approval is required:

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

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

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

- If funding department manager approval is not required:

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

In this case, PeopleSoft Workflow's Virtual Approver locates the manager of the initial approver and routes the request to the manager for approval.



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

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See [Workflow Options](#).

**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. If integration with Program Management is enabled, the system also changes the processing status of any corresponding projects in Program Management to inactive (if an associated project exists), and changes any resource assignments for the project to a status of *Canceled*.

**Cost**

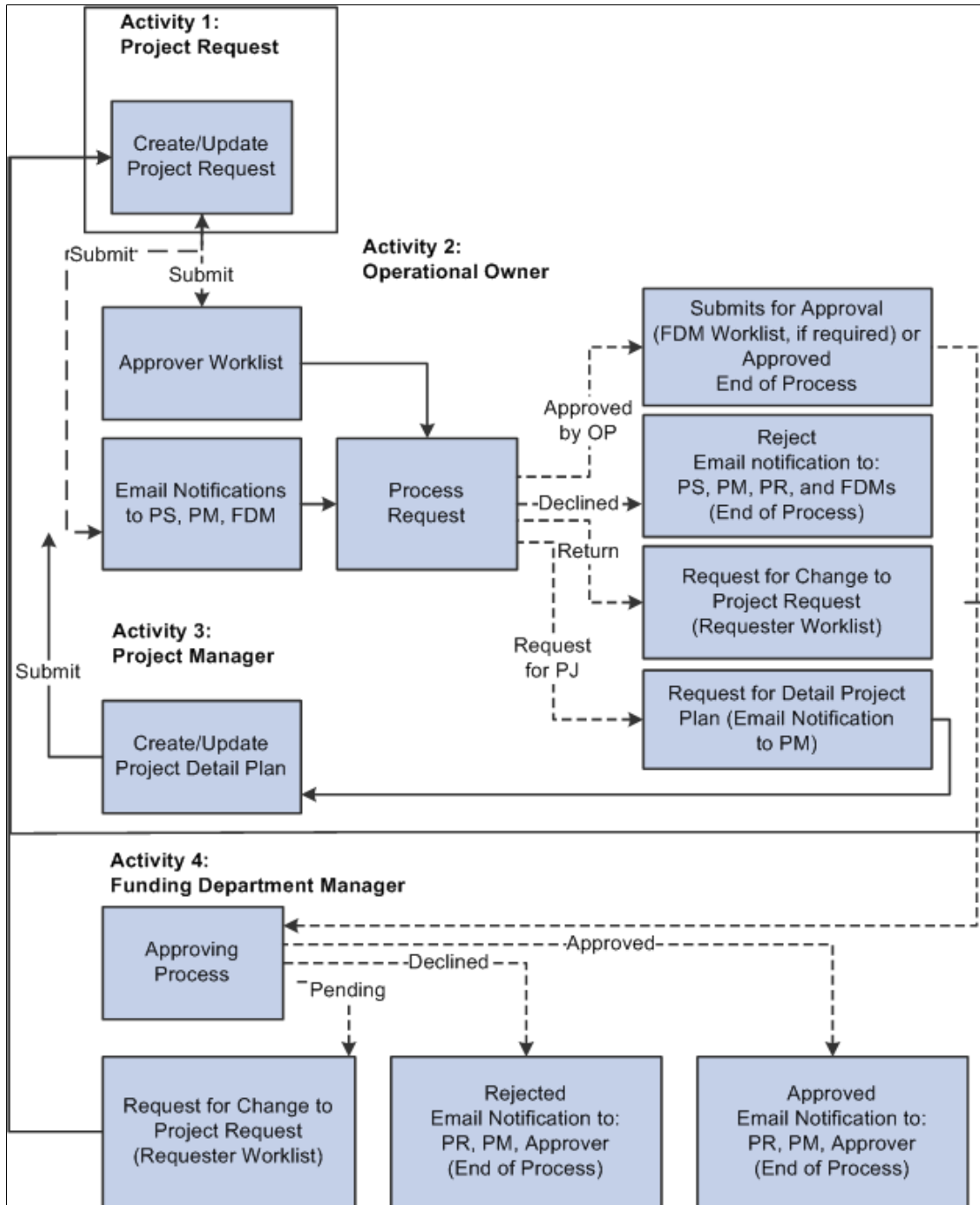
Indicates that detailed cost information is required. The system sends the project request to Program Management for cost details, routing the project request to the project manager, and updates the project request status to *Costing*.

This signifies that the project manager must create a detailed plan by using the various project planning tools that are in Program Management. When the plan is complete, the project manager clicks the Send to Project Request button by using the Project Request Estimate Summary page in Program Management. The system subsequently updates the project request status to *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 designated approver.

**Image: Project request approval workflow**

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



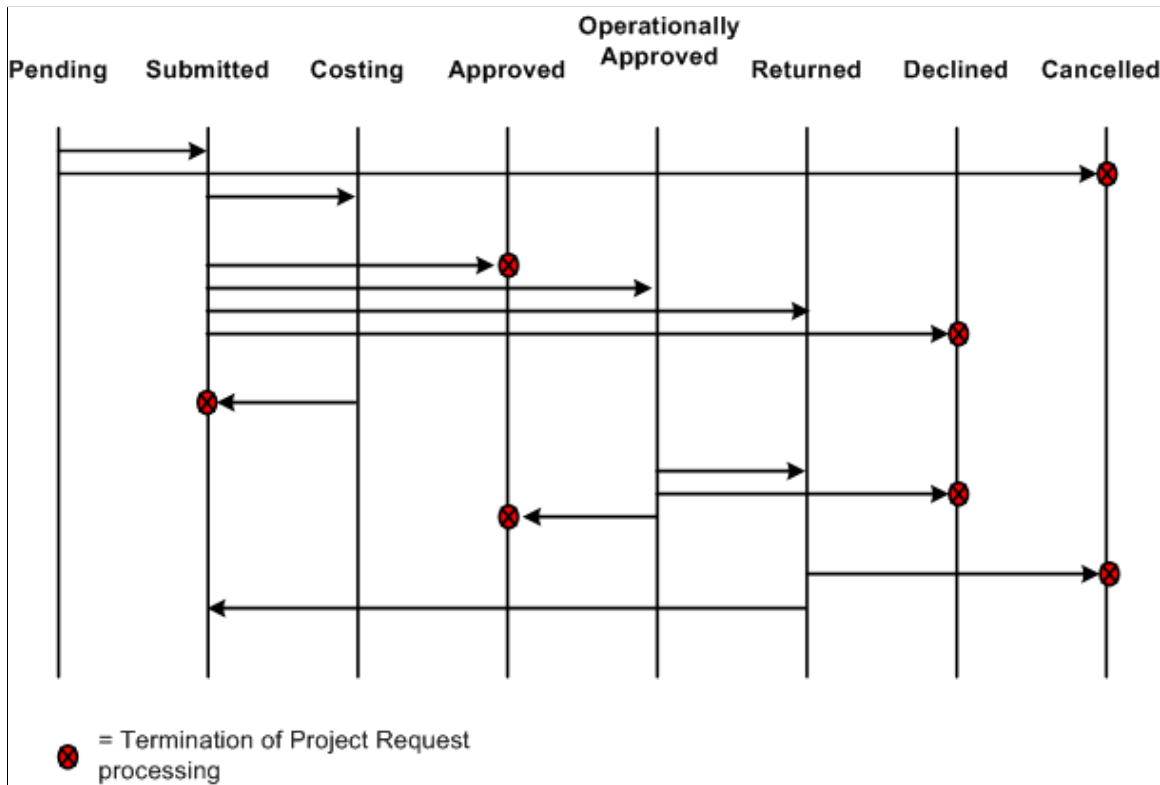
This table provides a key for the abbreviated roles that are in the project request workflow diagram:

**PS** Project sponsor

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

**Image: Project request status values**

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



## Creating Project Requests and Templates

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

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

- Establish project requests and templates.
- Add file attachments.
- Define relationships to other project requests.
- Assign milestones.
- Review approval status history.
- Update approval status.

- Specify save options.
- Adjust dates.
- Resolve issues.

## Pages Used to Create Project Requests and Templates

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

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

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

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

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

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

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

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

## Project Request Page

Use the Project Request page (BC\_PROJ\_REQUEST1) to create project requests and templates.

## Navigation

Project Portfolio Management, Project Requests

### Image: Project Request page

This example illustrates the fields and controls on the Project Request page. You can find definitions for the fields and controls later on this page.

The screenshot shows a web application interface for a Project Request. At the top, there are several tabs: Project Request (selected), Scoring, Attachments, Costs, Benefits, Dependency, Milestones, Summary Costs/Benefits, and Status History. Below the tabs, the following information is displayed:

- Business Unit:** CORP1 Corporation 1
- Project Request:** 200065
- Base Currency:** US Dollar

The **Request Details** section includes:

- \*Description:** Hosted Training
- Status:** Pending
- Requester:** Fields, Julia
- Department:** 10200 Recruiting
- \*Estimated Start:** 12/29/2002
- \*Estimated End:** 01/22/2003
- \*Priority:** 5 - Very Low
- Investment Type:** Informational
- Desired Finish:** (empty field)
- Project Manager:** (empty field with search icon)
- Initiative Type ID:** (empty field with search icon)

The **Approval Information** section includes:

- Sponsor:** Fields, Julia
- Approver:** (empty field)
- Owner:** (empty field)
- Owning Department:** 27000 Customer Service

The **Costs and Benefits** section includes:

- \*Currency:** US Dollar
- Base Currency:** US Dollar
- Costs:** \$180,000.00
- Benefits:** \$0.00
- Net Present Value:** \$-181,127.82
- KBO Support:** (empty field)
- Risk:** (empty field)
- Viewing Currency:** Transaction Currency (selected), Base Currency
- On-going Maintenance Cost:** (empty field)
- PV of Benefits:** \$0.00
- Return on Investment:** -100.000%
- Notes:** Notes (text area)

At the bottom, there are buttons for **Submit**, **Cancel**, **Save As**, and **Create a New Project Request Version**. Below the buttons, it shows **Last Update Date/Time:** 07/24/03 11:31:50AM and **Last Update User ID:** VP1.

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

### Business Unit

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

### Project Request or Template

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

See [Project Request ID Sequencing](#).

### Base Currency

Displays the business unit's base currency.

## Request Details

### Requester

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

### Priority

Select the project request's priority.

You establish priorities by using the Priorities page.

See [Priorities Page](#).

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

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



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

**Initiative Type ID**

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

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

You establish initiative types by using the Initiative Type page.

See [Initiative Types](#).

**Status**

Displays the current status of the project request.

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

Possible status values are:

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

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

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

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

when the cost estimate that is entered by the requester needs further validation by the project or program manager.

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

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

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

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

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

### **Investment Type**

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

This field is used for informational purposes only.

### **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. You attribute costs and benefits with a specific department by entering them using the Costs and Benefits pages that are within the Project Request component (BC\_PROJ\_REQUEST).

### **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 status to costing.



**Integration Template**

This field is required if you are integrating with PeopleSoft Program Management; otherwise, it does not appear. Integration templates are defined in Project Costing, and they are populated in Program Management during the extract, transform, and load (ETL) process. When a project request has a PeopleSoft Program Management project ID associated with it, this field becomes display-only.

See *PeopleSoft Project Costing : Structuring PeopleSoft Project Costing: "Creating Templates for Integration with Other Applications"*

**Project ID**

Click this link to access the General Information page (PROJECT\_GEN\_01A) in Program Management. This link is available only if Program Management integration is enabled, workflow is enabled, and the project request status is either costing or approved.

**Approval Information**

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

**Sponsor**

Select the person who is endorsing this project request.

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

**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 table to identify the name of the individual.

The Owner field is display-only prior to when the project request is submitted for approval, at which time it becomes editable so that the owner can change ownership responsibility to another individual, if that's appropriate.

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

**Approver**

The system automatically populates this field with the value in the Owner field when a project request is created and saved.

When the project request is submitted, this field becomes editable so that the project owner can change the approver to another individual, if it's appropriate.

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

- A project request is submitted.

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

### Owning Department

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

This field is used only for information.

### Costs and Benefits

This group box displays calculated costs and benefits information.

#### Viewing Currency

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

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

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

#### Currency

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

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

---

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

---

#### Costs and Benefits

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

#### On-going Maintenance Cost

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



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

### **Net Present Value**

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

### **Return on Investment**

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

### **PV of Benefits (Present Value of Benefits)**

Displays the present value of all benefit amounts for this project request.

### **KBO Support (key business objective support)**

Shows the calculated score for the KBO support score group.

You must associate the *Primary KBO* portfolio with the project request by using the Scoring page for the system to populate this field.

### **Risk**

Shows the calculated score for the Primary Risk score group.

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

## **Project Request Versions**

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

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

## **Actions**

### **Submit**

Click to submit a pending or returned project request for approval.

This option is not available for templates.

### **Cancel**

Click to cancel the project request. This button is available only when the status of the project request is returned or pending.

This option is not available for templates.

### **Create a New Project Request Version**

Click to create a new version of this request. This button is available only when the status of the project request is pending, submitted, declined, returned, or costing.

The system creates a new project request with several of the fields populated with values that are from the original project

request. Edit the values that differ for this version, add new values, and then save or submit the project request.

### Save As

Click to save the template or project request as a new project request or template by using the Save Options page.

## Project Request - Attachments page

Use the Project Request - Attachments page (BC\_PROJ\_ATTACH) to associate file attachments with a project request.

### Navigation

Project Portfolio Management, Project Requests, Attachments



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

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



Click the Delete Attachment button to remove an attached file.



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

## Project Request - Dependency page

Use the Project Request - Dependency page (BC\_PRJREQST\_DPN) to designate project requests upon which the current project request depends and view project requests that depend on the current project request.

### Navigation

Project Portfolio Management, Project Requests, Dependency

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

### Required

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



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

## Project Request - Milestones page

Use the Project Request - Milestones page (BC\_PRJREQST\_MST) to enter project request milestones and indicate their status.

### Navigation

Project Portfolio Management, Project Requests, Milestones

### Image: Project Request - Milestones page

This example illustrates the fields and controls on the Project Request - Milestones page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Milestones' tab selected in a navigation bar. Below the navigation bar, there are fields for 'Business Unit: CORP1 Corporation 1' and 'Base Currency: US Dollar', and 'Project Request: 200065 Hosted Training'. A link 'Create New Milestone' is visible. Below this is a table titled 'Milestone Details' with columns: Milestone, Description, Owner, Start Date, Due Date, Status, and two empty columns with '+' and '-' icons. The table contains one row with the following data:

Milestone	Description	Owner	Start Date	Due Date	Status		
IT_REORG	IT Department restructure	Fields,Julia			Not Started	+	-

### Create New Milestone

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

Insert rows as needed to document project request milestones.

### Milestone ID

Select the project request milestone.

### Owner

Displays the individual who is responsible for this milestone.

### Due Date

Displays the due date for this milestone.

### Milestone Status

Displays the current status of the milestone.

### Related Links

[Understanding Milestones](#)

## Project Request - Status History page

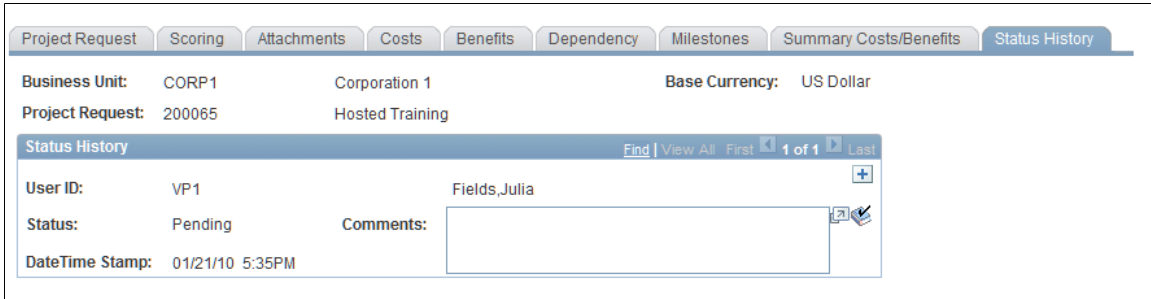
Use the Project Request - Status History page (PPK\_PROJREQ\_AUD) to review an audit trail of workflow approval status entries for the project request.

## Navigation

Project Portfolio Management, Project Requests, Status History

### Image: Project Request - Status History page

This example illustrates the fields and controls on the Project Request - Status History page. You can find definitions for the fields and controls later on this page.



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

## Updating Approval Status

By using your worklist, access the Project Approval page.

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

### Approve

Click to approve the project request.

To approve a project request, you must provide estimated costs.

### Decline

Click to decline the project request.

### Return

Click to send the project request back to the worklist of the submitter for additional work.

### Cost

Click to send the project request to PeopleSoft Program Management for the purpose of creating a detailed cost estimate for the project request. The Cost button does not appear if you have not selected the PeopleSoft Program Management Enabled check box that is on the Integration page.

To send a project request for costing, estimated costs and a project manager are required.

## Related Links

[Approval Workflow](#)

[Integration Page](#)

## Save Options

Use the Save Options page (PPK\_SAVE\_OPTIONS) to save a project request or template as either a new project request or a new template.

### Navigation

Click Save As on the Project Request page

### Image: Save Options page

This example illustrates the fields and controls on the Save Options page. You can find definitions for the fields and controls later on this page.

**Save as** Select whether to save this as a project request or template.

The options that you can select depend on the security that you have.

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

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

<i>Option for Save Project Request Sections</i>	<i>Fields</i>
Request Details	Business Unit

<b>Option for Save Project Request Sections</b>	<b>Fields</b>
	Investment Type
	Initiative Type ID
	Owner
	Approver
	Start Date (project requests only, not templates)
	End Date (project requests only, not templates)
	Priority (project requests only, not templates)
	Desired Finish (project requests only, not templates)
	Project Manager (project requests only, not templates)
	Base Currency
	Currency
Maintenance Cost	Maintenance Cost
Scoring	Score Group
	Score Type
	Gross Score
	Net Score
	Overall Score
	Risk Level
	Adj. (+/- %)
	Support Level
Attachments	Attached File
	Description
	Approver
	Owner
	Owning Department
Costs	Rate Type



<b>Option for Save Project Request Sections</b>	<b>Fields</b>
	Cost Detail fields: GL Unit, Department, Account, Year, Period, Amount, Capitalize
Benefits	Rate Type
	Cost Detail fields: GL Unit, Department, Account, Year, Period, Amount, Capitalize
Milestones	Milestone ID

## Project Request Date Change Option

Use the Project Request Date Change Option page (BC\_EST\_DATE\_CHANGE) to advance or delay a project request's estimated start date, estimated end date, or dates that are associated with costs and benefits.

### Navigation

Click the Move button on the Project Request - Costs page or the Project Request - Benefits page. This page appears automatically if you change the project request's estimated start date or estimated end date to a date that is in a different fiscal period.

### Image: Project Request Date Change Option page

This example illustrates the fields and controls on the Project Request Date Change Option page. You can find definitions for the fields and controls later on this page.

**Project Request Date Change Option**

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

\*Direction: Delay   
 No of Periods:

Move Costs  
 Move Benefits  
 Move Estimated Start Date  
 Move Estimated End Date

### Direction

Specify how to move the dates. Options are:

*Delay:* Select to shift dates to the past by a specified number of periods.

*Advance:* Select to shift dates to the future by a specified number of periods.

<b>No of Periods (number of periods)</b>	Enter how many fiscal periods to advance or delay the dates.
<b>Move Costs</b>	Select to move the cost details by the specified number of periods.
<b>Move Benefits</b>	Select to move the benefit details by the specified number of periods.
<b>Move Estimated Start Date</b>	Select to move the estimated start date by the specified number of periods.
<b>Move Estimated End Date</b>	Select to move the estimated end date by the specified number of periods.

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

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

## Project Request Validation Errors page

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

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

---

## Defining Estimated Costs and Benefits

This section discusses how to:

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

## Pages Used to Define Estimated Costs and Benefits

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

### Project Request - Costs page

Use the Project Request - Costs page (BC\_EST\_COST) to enter estimated cost details for a project request.

## Navigation

Project Portfolio Management, Project Requests, Cost

### Image: Project Request - Costs page

This example illustrates the fields and controls on the Project Request - Costs page. You can find definitions for the fields and controls later on this page.

The screenshot shows the 'Project Request - Costs' page. At the top, there are tabs for 'Project Request', 'Scoring', 'Attachments', 'Costs', 'Benefits', 'Dependency', 'Milestones', 'Summary Costs/Benefits', and 'Status History'. The 'Costs' tab is active.

Summary information includes:
 

- Business Unit: CORP1 Corporation 1
- Project Request: 12344 Customer1
- Estimated Start: 07/23/2002
- Estimated End: 07/23/2002
- Base Currency: US Dollar

The 'Cost Details' section has a 'Details' tab selected. Below it is a table with the following data:

*GL Unit	*Department	Description	Account	Description	*Year	*Period	*Amount	Currency	Capitalize		
CORP	10900	Education Services	000000001		2002	7	\$8,888.00	USD	<input type="checkbox"/>	+	-
CORP	20000	Sales Administration	000000011		2002	7	\$100.00	USD	<input type="checkbox"/>	+	-
CORP	21000	Eastern Sales Region	000000006		2002	7	\$2,000,000.00	USD	<input type="checkbox"/>	+	-

At the bottom of the table, there are buttons for 'Update Amount' and 'Move'. Below the table, the 'Total Estimated Costs' are shown as \$2,008,988.00 US Dollar.

### Cost Details - Details Tab

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

#### GL Unit (general ledger unit)

Enter the GL business unit that is associated with this cost.

#### Department

Select the department that is associated with this cost. Only departments of the specified GL unit are valid.

#### Account

Select the account to which the cost is attributed. Only accounts of the specified GL 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.

#### Capitalize

Select to distribute the costs evenly across three fiscal years. Depending on how your accounting calendar is defined, this can be the equivalent of 36 months, or 12 quarters, for example. The system distributes the costs using the accounting period of the earliest entered cost as the initial capitalization period. The estimated finish is not used to determine the final distribution, so if the time period that is estimated for the project is less than three fiscal years, the system distributes costs past the estimated finish date.

## Cost Details - Base Currency Tab

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



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

---

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

---

## Actions

### Update Amount

Click to update the amounts on the main project request page based on the data that is entered on the Project Request - Costs page.

### Move

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

## Benefit Comments Page

Use the Benefit Comments page (BC\_EST\_BENFT\_COM) to enter comments about benefit estimates.

### Navigation

Click the Comments button on the Project Request - Benefits page.

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

See [Project Request - Costs page](#).

## Project Request - Summary Costs/Benefits page

Use the Project Request - Summary Costs/Benefits page (BC\_EST\_COST\_BENFT) to view a summary of the costs and benefits, by general ledger business unit and department, for a project request.

Navigate to the Project Request Analysis by Department component.

## Navigation

Project Portfolio Management, Project Requests, Summary Costs/Benefits

### Image: Project Request - Summary Costs/Benefits page

This example illustrates the fields and controls on the Project Request - Summary Costs/Benefits page. You can find definitions for the fields and controls later on this page.

Summary of Costs and Benefits						
GL Unit	Department	Description	Estimated Costs	Estimated Benefits	Net Benefits	View Proj Req Analysis by Dept
CORP1	10900	Education Services	\$8,888.00		\$-8,888.00	
CORP1	20000	Sales Administration	\$100.00		\$-100.00	
CORP1	21000	Eastern Sales Region	\$2,000,000.00		\$-2,000,000.00	
	Total		\$2,008,988.00	\$0.00	\$-2,008,988.00	

Present Value of Benefits:	\$0.00
Net Present Value:	\$-2,008,988.00
Return on Investment:	-100.000%

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

#### Estimated Costs

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

#### Estimated Benefits

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



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

#### Related Links

[Analyzing the Impact of Project Requests](#)

## Determining Project Request Scores and Managing Risks

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

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

## Pages Used to Determine Project Scores and Manage Risks

<b>Page Name</b>	<b>Definition Name</b>	<b>Navigation</b>	<b>Usage</b>
Tree Manager	PSTREEMGR	Tree Manager, Tree Manager	Establish a tree that contains the categories against which to score project requests.
Portfolio Definition	BC_PORTFOLIO_DFN	Project Portfolio Management, Portfolios, Create/Edit Portfolios, Portfolio Definition	Establish a portfolio for use in scoring project requests.
Portfolio Definition - Component Weighting	BC_PORTFLIO_CMP	Project Portfolio Management, Portfolios, Create/Edit Portfolios, Component Weighting	Rank the relative importance of the categories that compose a score group
Project Request - Scoring	BC_PRJREQST_PORT	Project Portfolio Management, Project Requests, Scoring	Associate score group portfolios with a project request and generate scores.
Risk Elements	PPK_PR_RISK_ELEM	Click Edit Risk Elements on the Project Requests - Scoring page.	Associate risk elements and milestones with risk categories.
Risk Element	PPK_RISK_ELEMENT	Click Create New Risk Element on the Project Requests - Scoring page.	Define risk elements.
Risk Element Comment	PPK_PR_RISK_COM	Click a comments icon on the Risk Element page.	Enter comments about a risk element.
Milestone	PPK_MILESTONE	Click Create New Milestone on the Project Requests - Scoring page.	Define milestones.

### Related Links

"Understanding Portfolios (*PeopleSoft EPM 9.1: Scorecard*)"

## Understanding Project Request Scores

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

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

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

## Risk Score Adjustments

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

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

The system tracks the following scores for risks:

- Gross score.

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

- Net score.

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

## Portfolio Definition page

Use the Portfolio Definition page (BC\_PORTFOLIO\_DFN) to establish a portfolio for use in scoring project requests.



## Navigation

Project Portfolio Management, Portfolios, Create/Edit Portfolios, Portfolio Definition

### Image: Portfolio Definition page

This example illustrates the fields and controls on the Portfolio Definition page. You can find definitions for the fields and controls later on this page.

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

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

### Tree Name

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

## Portfolio Definition - Component Weighting Page

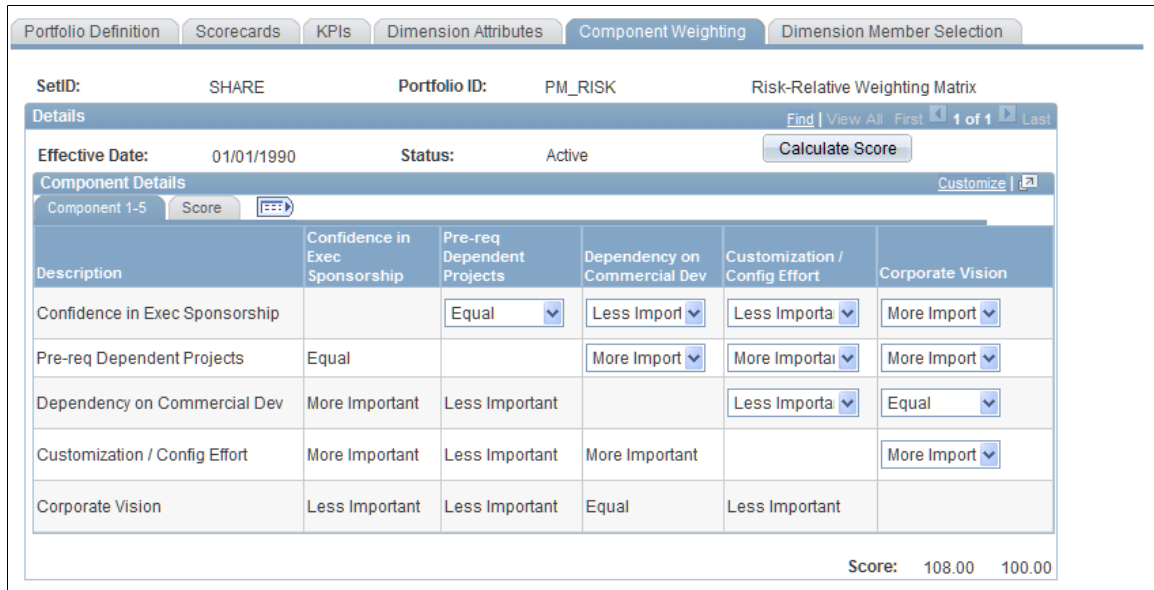
Use the Portfolio Definition - Component Weighting page (BC\_PORTFLIO\_CMP) to .

## Navigation

Project Portfolio Management, Portfolios, Create/Edit Portfolios, Component Weighting

### Image: Portfolio Definition - Component Weighting page

This example illustrates the fields and controls on the Portfolio Definition - Component Weighting page. You can find definitions for the fields and controls later on this page.



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

To rank the components and determine their scores:

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

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

See "Establishing Ranking Definitions (*PeopleSoft EPM 9.1: Scorecard*)".

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

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

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

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

## Project Request - Scoring page

Use the Project Request - Scoring page (BC\_PRJREQST\_PORT) to associate score group portfolios with a project request and generate scores.

### Navigation

Project Portfolio Management, Project Requests, Scoring

### Image: Project Request - Scoring page

This example illustrates the fields and controls on the Project Request - Scoring page. You can find definitions for the fields and controls later on this page.

Project Request
Scoring
Attachments
Costs
Benefits
Dependency
Milestones
Summary Costs/Benefits
Status History

Business Unit: CORP1 Corporation 1 Base Currency: US Dollar  
 Project Request: HT10010 Accounts Payable (ERP)

Primary Risk Find | View All | First 1 of 1 | Last

\*Score Group: PM\_RISK Risk-Relative Weighting Matrix [View Weighting](#) [Edit Risk Elements](#)

Risk Category	Risk Level	Gross Score	Adj. (+/- %)	Avg. Prob. of Milestones (%)	Net Adj.	Net Score	Comments
<a href="#">Confidence in Exec Sponsorship</a>	01 - Low	0.16	35.00	66.67	0.04	0.20	
<a href="#">Pre-reg Dependent Projects</a>	01 - Low	0.32	-20.00	86.67	-0.06	0.26	
<a href="#">Dependency on Commercial Dev</a>	05 - Medium	0.79	40.00	86.67	0.27	1.06	
<a href="#">Customization / Config Effort</a>	01 - Low	0.29				0.29	
<a href="#">Corporate Vision</a>	05 - Medium	0.37	20.00	80.00	0.06	0.43	

Gross Score: 1.93 Net Score: 2.24

Score Groups Find | View All | First 1 of 1 | Last

\*Score Group: PM\_KBO\_SUPPORT KBO-Relative Weighting Matrix [View Weighting](#)

Score Type: Primary KBO

Category	Support Level	Score
Expand Globally	05 - Medium	0.73
Reduce Costs	01 - Low	0.14
Increase Operational Efficiency	05 - Medium	0.22
Increase Revenue or Offerings	05 - Medium	1.00
Improve Customer Experience	10 - High	1.42
Investment in the Company	10 - High	1.82
Corporate Vision	05 - Medium	0.71

Overall Score: 6.04

[Calculate Score](#)

### Primary Risk

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

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

## Score Groups

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

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

Category grid. The components in the specified portfolio appear in the grid.

### Score Type

Select the score type for which this portfolio is used. Options are:

*Primary KBO:* (primary key business objective). Select to indicate that this is used for the key business objective support score.

This field is not required. However, a score for portfolios without a selected score type is not used in portfolio analysis.

---

**Note:** You may have as many non-typed portfolios as you like, but only one primary KBO or primary risk type.

---

### View Weighting

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

### Support Level

Select this project request's relative level of support for each category.

You define support levels by using the Component Ranking Definition page.

## Generating Scores

### Calculate Score

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

### Related Links

"Establishing Ranking Definitions (*PeopleSoft EPM 9.1: Scorecard*)"

## Risk Elements Page

Use the Risk Elements page (PPK\_PR\_RISK\_ELEM) to associate risk elements and milestones with risk categories.

## Navigation

Click Edit Risk Elements on the Project Requests - Scoring page.

### Image: Risk Elements page (1 of 2)

This example illustrates the fields and controls on the Risk Elements page (1 of 2). You can find definitions for the fields and controls later on this page.

#### Risk Elements

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

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

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

**Risk Category:** Confidence in Exec Sponsorship

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

Risk Elements Milestone Info

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

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

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

Risk Elements Milestone Info

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

**Image: Risk Elements page (2 of 2)**

This example illustrates the fields and controls on the Risk Elements page (2 of 2). You can find definitions for the fields and controls later on this page.

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

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

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

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

**Actions**

**Create New Risk Element**

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

**Create New Milestone**

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

**Risk Elements and Milestones**

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


**Risk Element**

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

**Risk Milestone**

Select a milestone to assign to the risk element.

You are not required to assign a risk milestone to each risk element. However, to determine the average probability, every risk element is considered, whether or not a milestone is assigned. If a risk element does not have a milestone, then the system uses a value of 100 percent when computing the average probability.

- Status** Displays the current status for the milestone.
- Prob. (%) (probability percentage)** Displays the percentage probability that this will occur on time.
-  Click to access the Risk Element Comment page, where you can enter or review comments for the risk element.

## Analyzing the Impact of Project Requests

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

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

## Pages Used to Analyze the Impact of Project Requests

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

## Understanding the Project Request Analysis by Department Component

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

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



- View the project request's return on investment.

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

- The Impact Analyzer page.

Shows cost and budget details over time by department.

Shows net present value (NPV) and return on investment (ROI) by department.

- The Variance Analyzer page.

Shows the cost details for project requests that affect a department.

Compares summarized period costs against budget constraints and shows the variance.

- The Analyzer Options page.

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

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

## **Analyzer Options page**

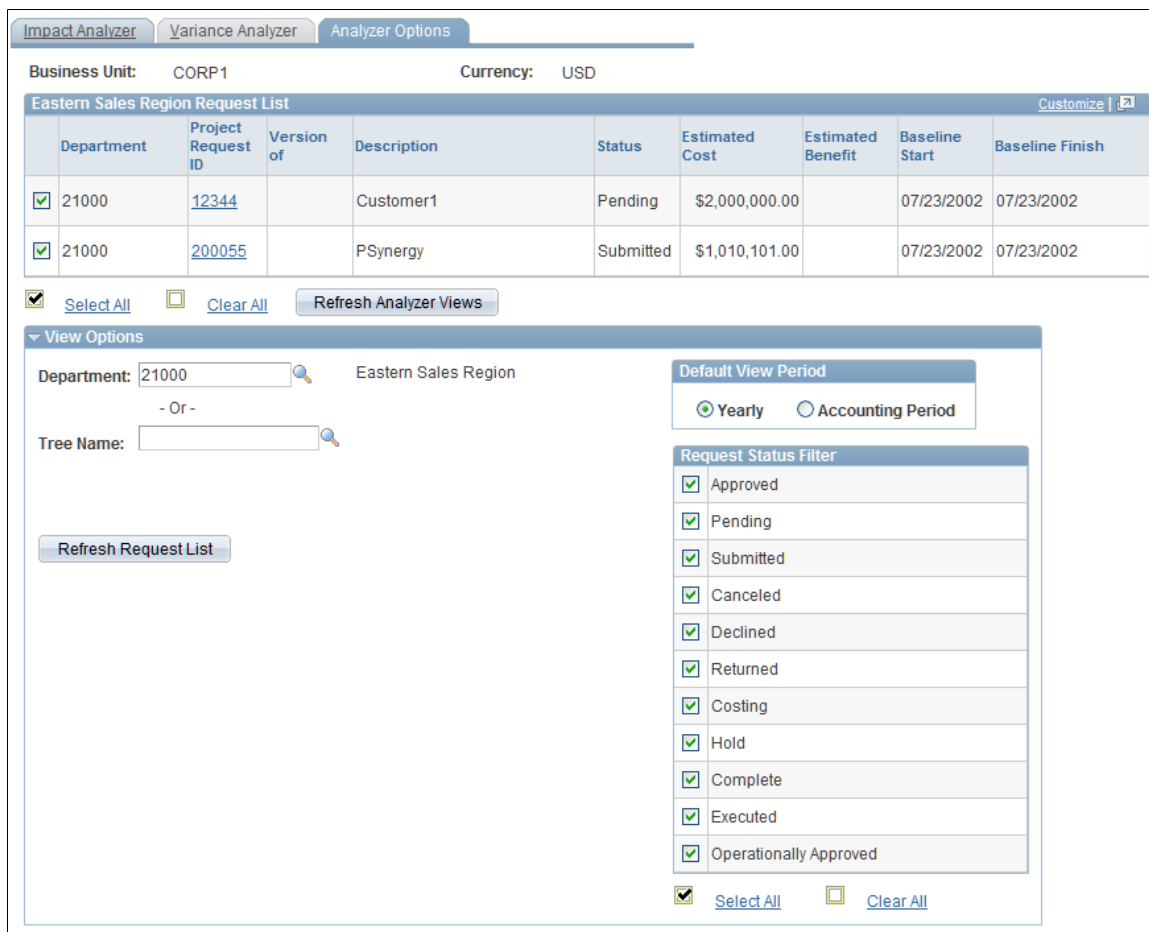
Use the Analyzer Options page (PPK\_XRF\_PRLIST) to specify which data to use for impact analysis and variance analysis.

## Navigation

Project Portfolio Management, Analysis, Project Req Analysis by Dept, Analyzer Options

### Image: Analyzer Options page

This example illustrates the fields and controls on the Analyzer Options page. You can find definitions for the fields and controls later on this page.



## View Options

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

### Department or Tree Name

Specify the department for which to review project requests.

You can select a department tree and navigate through the levels of the tree to specify a department, or enter the department ID directly. If you use the department tree, you can optionally select a node on the tree. This enables you to view all departments at or below that tree node.

### Refresh Request List

Click to update the list of project requests for the selected departments in the Request List grid.

### Default View Period

Specify the default time frame to use on the analyzer pages. Options are:

Yearly: Select to view subtotals by fiscal years.

Accounting Period: Select to view subtotals by accounting periods.

### **Request Status Filter**

Specify which status of project requests to review.

Select one or more status values. For example, if you select pending, you will view only those project requests that are in *Pending* status.

### **Select All and Clear All**

Click to either select all elements or clear all elements in the associated list.

## **<Department> Request List**

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

### **Project ID**

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

### **Version of**

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

### **Refresh Analyzer Views**

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

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

## **Impact Analyzer page**

Use the Impact Analyzer page (PPK\_XRF\_FINVW) to view project request amounts (costs, budget, NPV, ROI) over time for a department.

## Navigation

Project Portfolio Management, Analysis, Project Req Analysis by Dept, Impact Analyzer

### Image: Impact Analyzer page

This example illustrates the fields and controls on the Impact Analyzer page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Impact Analyzer' interface. At the top, there are tabs for 'Impact Analyzer', 'Variance Analyzer', and 'Analyzer Options'. Below the tabs, the 'Business Unit' is set to 'CORP1' and the 'Currency' is 'USD'. A 'Project Request Selection' section is expanded, showing a table of project requests for the 'Eastern Sales Region Request List'. The table has columns for Department, Project Request ID, Description, Status, Estimated Cost, Estimated Benefit, Baseline Start, and Baseline Finish. Two rows are visible: one for 'Customer1' (Project Request ID 12344, Status Pending, Estimated Cost \$2,000,000.00) and one for 'PSynergy' (Project Request ID 200055, Status Submitted, Estimated Cost \$1,010,101.00). Below the table are buttons for 'Select All', 'Clear All', and 'Refresh Analyzer Views'. A 'View By' dropdown is set to 'Period'. Below this is an 'Eastern Sales Region Impact Summary' table with columns for years 2002-4 through 2002-9 and a 'Total' column. The summary rows include Total Benefit, Total Cost (\$1,176,767.67), Net Cost (\$-1,176,767.67), Net Present Value (\$-1,170,695.22), and Return on Investment (-100%). Below the summary are sections for 'Estimated Project Request Benefits' and 'Estimated Project Request Costs', each with a table showing values for the same years and a total. At the bottom, there are 'Return to Search' and 'Notify' buttons, and a breadcrumb trail: 'Impact Analyzer | Variance Analyzer | Analyzer Options'.

## Project Request Selection

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

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

### Refresh Analyzer Views

Click to update the associated totals when you modify the project request selection.

### Select All and Clear All

Click to either select all elements or clear all elements in the associated list.

## View Options

### View By

Specify the time frame to view. Options are:

*Year:* Select to view subtotals by fiscal years.

*Period:* Select to view subtotals by accounting periods.



Click to scroll the page view to an earlier time frame.



Click to scroll the page view to a later time frame.

## <Department> Impact Summary

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

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

Calculated as total benefits – total costs.

- Net Present Value.

The calculation that is used for this field is:

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

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

- Return on Investment.

The calculation that is used for this field is:

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

## Estimated Project Request Benefits

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

## Estimated Project Request Costs

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

## Analyzing Cost Details and Budget Variances

Use the Variance Analyzer page (PPK\_XRF\_PROJVW) to view the variance between budget and actual costs for project requests and project request cost details.

### Navigation

Project Portfolio Management, Analysis, Project Req Analysis by Dept, Variance Analyzer

### Image: Variance Analyzer page

This example illustrates the fields and controls on the Variance Analyzer page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Variance Analyzer' interface. At the top, it shows 'Business Unit: CORP1' and 'Currency: USD'. Below this is a 'Project Request Selection' section with a table titled 'Eastern Sales Region Request List'. The table has columns for Department, Project Request ID, Description, Status, Estimated Cost, Estimated Benefit, Baseline Start, and Baseline Finish. Two rows are visible: one for 'Customer1' (Pending, \$2,000,000.00) and one for 'FSynergy' (Submitted, \$1,010,101.00). Below the table are buttons for 'Select All', 'Clear All', and 'Refresh Analyzer Views'. A 'View By' dropdown is set to 'Period'. Below that is a 'Variance Summary' table for 'Eastern Sales Region' with columns for years 2002-4 through 2002-9 and a 'Total' column. The summary shows Total Cost, Budget Constraint, Variance, and Total Benefit. At the bottom is a 'Project Request Cost Detail' table with columns for Department, Project Request ID, Version of, Status, and years 2002-4 through 2002-9 and a 'Total' column. It shows cost details for the two project requests. Navigation buttons 'Return to Search' and 'Notify' are at the bottom left.

### Project Request Selection

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

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

### Refresh Analyzer Views

Click to update the associated totals when you modify the project request selection.

### Select All and Clear All

Click to either select all elements or clear all elements in the associated list.

**<Department> Variance Summary**

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

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

See [Department Budget Source page](#).

**Project Request Cost Detail**

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





# Establishing and Analyzing Project Portfolios

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## Understanding Portfolio Analysis

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

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

### Project Portfolios

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

The steps to set up a project portfolio are:

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

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

3. Create your project portfolio tree.

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

### Project Portfolio Tree

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

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

**Image: PORTFOLIO\_DEMO tree**

This example illustrates the fields and controls on the PORTFOLIO\_DEMO tree. You can find definitions for the fields and controls later on this page.




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

---

## Measures and Dimensions

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

## The Portfolio Analysis Component

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

Using this page, you navigate through the project portfolio tree to view the data associated with the selected node. If the selected node has nodes that are subordinate to it, the data that appears is aggregated

from the immediate subordinates of that node using the summarization rules specified for that dimension or measure. If the selected node has no subordinates, then the data that is viewed will be for each of the projects and project requests within that portfolio.

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

The following chart types are provided:

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

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

## Establishing Project Portfolios

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

This section discusses how to:

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

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

See "Understanding Portfolios (*PeopleSoft EPM 9.1: Scorecard*)".

## Pages Used to Establish Project Portfolios

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

## Portfolio Definition Page

Use the Portfolio Definition page (BC\_PORTFOLIO\_DFN) to create a portfolio definition.

### Navigation

Project Portfolio Management, Portfolios, Create/Edit Portfolio, Portfolio Definition

### Image: Portfolio Definition page

This example illustrates the fields and controls on the Portfolio Definition page. You can find definitions for the fields and controls later on this page.

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

- SetID:** SHARE
- Portfolio ID:** PM\_IT\_INVEST
- Effective Date:** 01/01/1990
- Status:** Active
- Description:** Corporate IT Investments
- Tree Name:** PM\_VISION\_ONLY
- Notes:** (Empty text area)

### Description

Enter a description for the project portfolio.

### Tree Name

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

## Portfolio Definition - Dimension Member Selection page

Use the Portfolio Definition - Dimension Member Selection page (BC\_PORTFLIO\_OBJ) to specify which projects to include in the portfolio.

## Navigation

Project Portfolio Management, Portfolios, Create/Edit Portfolio, Dimension Member Selection

### Image: Portfolio Definition - Dimension Member Selection page

This example illustrates the fields and controls on the Portfolio Definition - Dimension Member Selection page. You can find definitions for the fields and controls later on this page.

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

#### Member List Type

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

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

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

#### Selection Rule

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

#### View Selection Rule

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

#### Create Selection Rule

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

## Establishing Selection Rules

This section discusses how to:

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

## Pages Used to Establish Selection Rules

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

### Dim Member Select Page

Use the Dim Member Select page (BC\_KPI\_FILTER) to define a rule that specifies which project request IDs to include in a portfolio.

## Navigation

- Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Select
- Select the Create Selection Rule link or the View Selection Rule link on the Portfolio Definition - Dimension Member Selection page.

### Image: Dim Member Select page

This example illustrates the fields and controls on the Dim Member Select page. You can find definitions for the fields and controls later on this page.

The screenshot displays the 'Dim Member Select' page with the following details:

- SetID:** SHARE
- Dim Member Selection Rule:** TEST2
- Effective Date:** 01/01/1990
- Status:** Active
- Description:** Another PPM Test
- Warehouse Name:** Operational Warehouse
- Dimension:** PROJECT\_REQUEST
- Dimension Selection:**
  - Dimension Record:** PROJ\_N\_REQ\_VW (Projects and Proj Requests VW)
  - Criteria Table:**

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

### Warehouse Name

Select the warehouse to use as the data source for this data element. Options are:

*Multi-Dimensional Warehouse.*

*Operational Warehouse.*

### Dimension

Select the dimension from which the rule retrieves members.

### Clear Selection

Click this link to clear the current selection criteria.

### Dimension Selection

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

### Open and Close

Select the number of opening or closing parentheses needed for the selection criteria.

### Field Name

Select the field to use for the filter criteria.

### Comparison Operator

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

*Equal To*

*Greater Than.*

*Greater Than or Equal To.*

*Less Than.*

*Less Than or Equal To.*

*Equal To.*

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

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

*Not Equal To.*

**Value**

Enter or select the comparison value.

**And/Or**

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

## **Dim Member Select - Advanced Selection page**

Use the Dim Member Select - Advanced Selection page (BC\_KPI\_FILTER\_ADV) to extend the selection rule by specifying criteria for fields that are outside of the dimension.



## Navigation

Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Advanced Selection

### Image: Dim Member Select - Advanced Selection page

This example illustrates the fields and controls on the Dim Member Select - Advanced Selection page. You can find definitions for the fields and controls later on this page.

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

#### Clear Selection

Click to clear the current selection criteria.

## Additional Selection

#### Record Type

Specify the type of record to use. Options are:

*Associate with Dimension:* Select to use records from dimension data for this filter.

*KPI Data:* Select to use KPI records for this filter.

Your selection controls which records appear in the selection list for the Additional Record field.

#### Additional Record

Select to the record upon which to base your additional criteria.

#### Relationship to other criteria

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

## Additional Search Fields

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

See [Dim Member Select Page](#).

## Dim Member Select - Dim Member Preview page

Use the Dim Member Select - Dim Member Preview page (BC\_KPI\_FILTER\_VIEW) to preview the list of dimension members that are retrieved by this selection rule.

### Navigation

Scorecards, Administration, Portfolio Objects, Dim Member Selection Rule, Dim Member Preview

### Preview Parameters

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

### Dimension Members

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

## Establishing Project Portfolio Trees

This section discusses how to create project portfolio trees.

### Page Used to Establish Project Portfolio Trees

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

## Creating a Project Portfolio Tree

To create a project portfolio tree:

- Using PeopleSoft Tree Manager, create a tree, using the PORTFOLIO\_PPK structure.  
Set levels to *Strictly Enforced*.
- Add nodes to the tree, selecting the portfolio ID for each node.

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

See the product documentation for *PeopleTools: PeopleSoft Tree Manager*

## Analyzing Project Portfolios

This section discusses how to:

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

### Pages Used to Analyze Project Portfolios

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

### Related Links

[Establishing Portfolio Analysis Preferences](#)

### Portfolio Analysis Page

Use the Portfolio Analysis page (BC\_PORTFLIO\_VIEW) to analyze important metrics for multiple project requests.

#### Navigation

- Project Portfolio Management, Analysis, Portfolio Analysis
- Click OK on the Portfolio Analysis Search page.

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

**Image: Portfolio Analysis page**

This example illustrates the fields and controls on the Portfolio Analysis page. You can find definitions for the fields and controls later on this page.

### Portfolio Analysis

**Chart Parameters**

Analysis: COST\_BNFT\_ANALY  Default Analysis Save Analysis

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

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

Additional Line Plot

Y1 Data: ESTBEN  
 Y2 Data:   
 Y3 Data:

Delete Refresh

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

Year: 2002 Period: 4 Base Currency: USD

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

**Cost Benefit Analysis**

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

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

**Chart Parameters**

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

**Analysis**

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

**Default Analysis**

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

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**Save Analysis**

After defining the chart parameters, click to save the currently defined analysis. There are several ways to save an analysis configuration:

- If the analysis has never been saved, enter the name in the adjacent edit box, then click Save Analysis. The Analysis field will automatically populate with the saved analysis name.
- To save the analysis to a new name, enter the name in the adjacent edit box, then click Save Analysis.
- To save changes to the currently loaded analysis, click Save Analysis without entering a name in the adjacent edit box.

**Chart Title**

Enter the title for the chart.

**Chart Type**

Select the type of chart to generate. Options are:

*Bar Chart - 2d*: Select to generate a two dimensional bar chart.

*Bar Chart - 3d*: Select to generate a three dimensional bar chart.

*Bubble Chart*: Select to generate a bubble chart.

*Line Chart*: Select to generate a line chart.

*Pie Chart - 2d*: Select to generate a two dimensional pie chart.

*Pie Chart - 3d*: Select to generate a three dimensional pie chart.

*Stacked Bar - 2d*: Select to generate a two dimensional stacked bar chart.

*Stacked Bar - 3d*: Select to generate a three dimensional stacked bar chart.

**Additional Line Plot and Plot Data**

Select this check box to include an overlay line on the chart, and select the measure to use for its data.

This option is available only for bar charts and stacked bar charts.

**X Axis**

Select the dimension or measure to use as the data for the X axis. For line and bubble charts, the available values are measures, for the remaining chart types, the available values are dimensions.

**X Title**

Enter the X axis title.

**Y Axis**

Select the measure to use as data for the Y axis.

**Y Title**

Enter the Y axis title.

**Y1 Data**

Select the dimension or measure to use as the 2nd set of data to stack vertically on the bars.

	This option is available only for stacked bar charts.
<b>Y2 Data</b>	Select the dimension or measure to use as the 3rd set of data to stack vertically on the bars.  This option is available only for stacked bar charts.
<b>Y3 Data</b>	Select the dimension or measure to use the 4th set of data to stack vertically on the bars.  This option is available only for stacked bar charts.
<b>Size</b>	Select the dimension or measure to use as the data for the bubble size.  This option is available only for bubble charts.
<b>Color</b>	Specify which measure's assessment color to use as the bubble color. This option is available only for bubble charts.
<b>X Label 1</b>	Enter text for the label. This option is available only for bubble charts. It represents the trend, and appears as the left-most label on the X axis.
<b>X Label 2</b>	Enter text for the label. This option is available only for bubble charts. It represents the trend, and appears as the right-most label on the X axis.
<b>Y Label 1</b>	Enter text for the label. This option is available only for bubble charts. It is the label that appears lowest on the Y axis.
<b>Y Label 2</b>	Enter text for the label. This option is available only for bubble charts. It is the label that appears highest on the Y axis.
<b>Delete</b>	Click to delete the current saved analysis configuration.

### Portfolio KPI - Measures in Chart

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

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

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

### Related Links

[Establishing Portfolio Analysis Preferences](#)

## Defining Measures and Dimensions

### Portfolio Analysis Search Page

Use the Portfolio Analysis Search page (BC\_PORTVIEW\_FILTER) to specify analysis parameters.

#### Navigation

Click Change View Parameters on the Portfolio Analysis page.

#### Image: Portfolio Analysis Search page

This example illustrates the fields and controls on the Portfolio Analysis Search page. You can find definitions for the fields and controls later on this page.

The screenshot shows a form titled "Portfolio Analysis Search" with the following fields and values:

- \*Business Unit: CORP1 (with a magnifying glass icon and "Corporation 1" label)
- \*Scenario: PPM\_SCENAR (with a magnifying glass icon and "Project Portfolio Scenario" label)
- \*Year: 2002 (dropdown menu)
- \*Period: 4 (dropdown menu)
- \*Portfolio Tree: PORTFOLIO\_DEMO (with a magnifying glass icon and "Demo Portfolio Tree" label)

An "OK" button is located at the bottom left of the form.

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

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

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

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

### Project Period View Page

Use the Project Period View page (BC\_PROJECT\_VIEW) to review estimated costs and benefits per project request, by accounting period or fiscal year.

## Navigation

Click the View Projects by Periods link on the Portfolio Analysis page.

### Image: Project Period View page

This example illustrates the fields and controls on the Project Period View page. You can find definitions for the fields and controls later on this page.

**View Project by Period**

**Project Period View**      Business Unit: Corporation 1      Scenario ID: Project Portfolio Scenario

Portfolio ID: Marketing      Base Currency: USD

View By:       Chart Type:

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

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

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

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

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



## Chapter 6

# Using Project Portfolio Management Processes and Utilities

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## Understanding Project Portfolio Management Processes and Utilities

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

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

This section discusses:

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

### Scorecard Assessment Process

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

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

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

See ."Understanding KPI and Scorecard Processing (*PeopleSoft EPM 9.1: Scorecard*)"

### Update Milestone Probabilities Process

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

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

- If the milestone status is *Complete* and the Probability of Occurrence field is not 100 percent, the system sets the Probability of Occurrence field to 100 percent.

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

This process should be run at regular intervals.

## Convert Currency Utility

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

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

---

## Updating Milestone Probabilities

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

### Page Used to Update Milestone Probabilities

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

### Update Milestone Probabilities Page

Use the Update Milestone Probabilities page (PPK\_RUN\_MST\_AE) to run the Update Milestone Probabilities Application Engine process.

#### Navigation

Project Portfolio Management, Administration, Processing, Update Milestone Probabilities

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## Converting Currency

This section discusses how to run the convert currency utility.

## Page Used to Convert Currency

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

## Process Currency Conversions Page

Use the Process Currency Conversions page (PPK\_PROCESS) to convert currency amounts.

This synchronizes all monetary amounts for project requests.

### Navigation

Project Portfolio Management, Administration, Processing, Process Currency Conversions



## Chapter 7

# Integrating with PeopleSoft Program Management

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## Understanding Integration with Program Management

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

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

When integrated with Portfolio Management, Program Management:

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

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## Defining Integration Options

You enable integration by using the Integration page.

See [Integration Page](#).

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## Setting Up PeopleSoft Integration Broker

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

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

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

See *PeopleTools : PeopleSoft Integration Broker Administration*

---

## Activating Relevant Application Messages

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

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

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

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

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

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

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

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

See *PeopleTools : PeopleSoft Integration Broker Administration*

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

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## Setting Up Node Definitions

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

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

## Chapter 8

# Key Performance Indicators (KPIs)

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## Understanding Project Portfolio Management KPIs

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

This section discusses:

- KPI terminology.
- Delivered elements.

### KPI Terminology

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

<b>Term</b>	<b>Definition</b>
KPI Definition	Defines a KPI to the system. You specify how to calculate it, the KPI dimension members, and their target rules.
What this KPI does	Narrative description of this KPI.
Calculation Description	<ul style="list-style-type: none"><li>• The analysis calculations that comprise the KPIs, which illustrate the record and fields being accessed. The tablemaps and datamaps access this information.</li><li>• The type of aggregation that is occurring: This information is shown on the data element panel.</li><li>• The criteria necessary to access a specific field: This information is shown on the filter</li><li>• The fields that are being aggregated: This information is shown on the data element panel.</li></ul>
Calculation Expression	The entry in the Calculation Expression field on the Calculations - Expression (KP_CALC_DEFN2) page.
Composite Pieces	KPIs used if this is a composite KPI; this is blank or n/a for all but composite KPIs.
Data Used in the KPI	KPI Name or KPI ID. Not used for composite KPIs, which are listed in Composite Pieces row.

<b>Term</b>	<b>Definition</b>
Calculation Definition	Defines calculations on which a KPI is based.
KPI Calculation Rule	Assigns calculation IDs to a KPI.
TableMap	Defines the physical relationships between tables and is the foundation for DataMaps.
DataMap	Enables you to define what subset of data gets processed by or uses a specific business rule. For example, you might use a filter to specify or "filter" out only employees who have a review rating of 3 or higher.
Constraint	Is based on DataMaps. Constraints allow you to define business rules for processing and also enable you to reuse and group filters.
Data Element	Defines a subset of data and the rules by which to group it. Data elements are used as the basis for key performance indicators and as target values for KPI dimension members.
Model ID	Enables you to define the type of data you want to analyze and how you want to analyze it.
Scenario	Points to a Model ID and defines the business rules, economic assumptions, and chunking selection for processing.
KPI Dimension Members	Individual items for which a KPI is assessed.
KPI Target Rule	Rules that determine how a KPI dimension member is assessed.
Dimension	An attribute, such as time, product, and location, used to categorize or identify a particular piece of data. In the Enterprise Performance Management product line, you can view product, customer and channel dimensions.
Perspective Type	A category for organizing CSFs and KPIs. Usually there are four: financial; customer; internal; and learning.
KPI Cause/Effect (KPIs affected by this KPI)	Which KPIs the current KPI impacts.
Critical Success Factor	The critical success factor to which this KPI is attached.
Strategy KPIs	Calculated values for assessing your critical success factors, strategic thrusts, and strategic initiatives. A KPI is associated with a strategy tree component or strategic initiative.
KPI Type	One of these: Manual, Calculated, Composite.

## Related Links

"PeopleSoft Scorecard Overview (*PeopleSoft EPM 9.1: Scorecard*)"



## Delivered Elements

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

<b>Scorecard ID for Project Portfolio Management Scorecard:</b>	PM_PROJECTS
<b>Strategy Tree:</b>	PM_STRATEGY_01
<b>Scenario ID</b>	PPM_SCENARIO

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## Delivered KPI Details

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



## Appendix A

# Delivered Workflows for Project Portfolio Management

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## Delivered Workflows for Project Request Approval

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

### Approval Process for Funding Department Managers

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

- Preapproved.
- Return to requester.

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

#### Preapproved Event

<b>Information Type</b>	<b>Description</b>
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 Costs/Benefits page (BC_EST_COST_BENFT) and changes the project request status to <i>Operationally Approved</i> .
Notification Method	Worklist

#### Workflow Objects

<b>Information Type</b>	<b>Description</b>
Event	PRE_PROCESS (PRE APPROVED)

<b>Information Type</b>	<b>Description</b>
Approval Rule Set	PPK_FUNDMGT_APPROVAL
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_PRJ_FUNMGT_APPROVAL
Role	MANAGER, DIRECTOR_FUNDING, VICE_PRESIDENT

### Return to Requester Event

<b>Information Type</b>	<b>Description</b>
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 <i>Returned</i> .
Notification Method	Worklist

### Workflow Objects

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

### Approval Process for Project Approver

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

- Approval process event.
- Return event.

## Approval Process Event

<b>Information Type</b>	<b>Description</b>
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 <i>Submitted</i> .
Notification Method	Worklist

## Workflow Objects

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

## Return Event

<b>Information Type</b>	<b>Description</b>
Event Description	This event is triggered when an 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 <i>Returned</i> .
Notification Method	Worklist

## Workflow Objects

<b>Information Type</b>	<b>Description</b>
Event	RETURN_EVEN

<b>Information Type</b>	<b>Description</b>
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 you establish at the installation level by using the Program Management page (INSTALLATION\_PGM) in the Installation Options component (INSTALLATION).

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### Approver Send Email Event

<b>Information Type</b>	<b>Description</b>
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

### Workflow Objects

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

<b>Information Type</b>	<b>Description</b>
Role	None

### Notify Sponsor Event

<b>Information Type</b>	<b>Description</b>
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 <i>Approved</i> or <i>Denied</i> as appropriate.
Notification Method	Email

### Workflow Objects

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

### Notify Project Manager Event

<b>Information Type</b>	<b>Description</b>
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 <i>Approved</i> or <i>Denied</i> as appropriate.
Notification Method	Email

## Workflow Objects

<i>Information Type</i>	<i>Description</i>
Event	PRJ_MGT
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DENY_OWNER
Role	None

## Notification for Funding Department Manager Approved or Denied Request

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

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

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

### Approver Send Email Event

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

## Workflow Objects

<i>Information Type</i>	<i>Description</i>
Event	Approver Send Email
Approval Rule Set	None



<b>Information Type</b>	<b>Description</b>
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DNY_FUND
Role	None

### Notify Sponsor Event

<b>Information Type</b>	<b>Description</b>
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 <i>Approved</i> or <i>Denied</i> as appropriate.
Notification Method	Email

### Workflow Objects

<b>Information Type</b>	<b>Description</b>
Event	TO_SPONSOR
Approval Rule Set	None
Business Process	PPK_PROJ_APPR_BP
Activity	PPK_APR_DNY_FUND
Role	None

### Notify Project Manager Event

<b>Information Type</b>	<b>Description</b>
Event Description	This event is triggered when a project request is approved by all funding department managers or denied by the project request approver.

<b>Information Type</b>	<b>Description</b>
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 <i>Approved</i> or <i>Denied</i> as appropriate.
Notification Method	Email

## Workflow Objects

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

## Notification to Funding Manager

This section discusses the Notification to Funding Manager workflow.

### Description

<b>Information Type</b>	<b>Description</b>
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 <i>Submitted</i> .
Notification Method	Email

### Workflow Objects

<b>Information Type</b>	<b>Description</b>
Event	Send Email mgts

<b>Information Type</b>	<b>Description</b>
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

<b>Information Type</b>	<b>Description</b>
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 <i>Submitted</i> .
Notification Method	Email

### Workflow Objects

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

## Request for Detail Project Plan

This section discusses the Request for Detail Project Plan workflow.

## Description

<b>Information Type</b>	<b>Description</b>
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 <i>Costing</i> .
Notification Method	Worklist

## Workflow Objects

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