Oracle Fusion Product Lifecycle Portfolio Management
Using Product Lifecycle Portfolio Management

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Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.

Note

If you don't see any help icons on your page, then click the Show Help icon button in the global area. However, not all pages have help icons.

You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. To access the guides, go to any page in Oracle Fusion Applications Help and select Documentation Library from the Navigator menu.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief
financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Intended Audience</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Common User Guide</td>
<td>All users</td>
<td>Explains tasks performed by most users.</td>
</tr>
<tr>
<td>Common Implementation Guide</td>
<td>Implementors</td>
<td>Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.</td>
</tr>
<tr>
<td>Functional Setup Manager User Guide</td>
<td>Implementors</td>
<td>Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.</td>
</tr>
</tbody>
</table>
| Technical Guides                           | System administrators, application developers, and technical members of implementation teams | Explain how to install, patch, administer, and customize Oracle Fusion Applications.  
**Note**  
Limited content applicable to Oracle Cloud implementations. |


**Other Information Sources**

**My Oracle Support**


Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.
Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides details on service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production, and changes.

In Oracle Fusion Applications, you can use Oracle Enterprise Repository at http://fusionappsoer.oracle.com for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.

- Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/us/corporate/accessibility/index.html.

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use Send Feedback to Oracle from the Settings and Actions menu in Oracle Fusion Applications Help.
A product portfolio consists of a set of products, product concepts, and a defined team. In the Develop Product Portfolio activity, the portfolio manager can evaluate products and product concepts in order to determine the best ones to develop. Product portfolio development involves:

<table>
<thead>
<tr>
<th>Task</th>
<th>What you can do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop Product Portfolio Structure</td>
<td>• Add products and product concepts (proposals) to a portfolio, and assemble a portfolio team.</td>
</tr>
<tr>
<td></td>
<td>• Update financial information for product and product concepts.</td>
</tr>
<tr>
<td>Analyze Product Portfolio</td>
<td>• Edit a scenario based on the analyses displayed for the scenario in terms of value, balance, strategy analysis, resource consumption, and product mix.</td>
</tr>
<tr>
<td></td>
<td>• Compare different scenarios in terms of portfolio metrics.</td>
</tr>
<tr>
<td></td>
<td>• Generate What-if scenarios to adjust each product portfolio scenario using various types of analyses.</td>
</tr>
</tbody>
</table>
Define Product Portfolio Strategy

Define Product Portfolio Strategy: Overview

In the Define Product Portfolio Strategy activity, the product portfolio manager creates a portfolio to analyze how to execute the product strategy while meeting budget and resource constraints to achieve intended revenue and other goals. Product portfolio strategy involves:

<table>
<thead>
<tr>
<th>Task</th>
<th>What you can do</th>
</tr>
</thead>
</table>
| Create Product Portfolio          | • Create a new portfolio, create a portfolio from a template or from an existing portfolio and retain most of the information of the existing portfolio along with pre-defined standard metrics, targets and analyses.  
• Edit portfolio attributes and delete unfeasible portfolio or that which contains incorrect data. |
| Define Product Portfolio Metrics  | • Add product and portfolio metrics for evaluation.  
• Provide resource capacity information.                                                                                                      |
| Define Product Portfolio Goals    | • Set product portfolio goals by assigning target value ranges for product and portfolio metrics.  
• Evaluate product metrics for each product, and portfolio metrics for each What-if scenario of the portfolio.                              |
• Regular
• Template

**Which Values Are Copied**

Depending on the type of source and target portfolio, the following values are copied:

<table>
<thead>
<tr>
<th>Source portfolio type</th>
<th>Target portfolio type</th>
<th>Which are copied</th>
</tr>
</thead>
</table>
| Regular               | Regular               | • General information  
|                       |                       | • Metrics  
|                       |                       | • Attachments  
|                       |                       | • Resource Capacity  
|                       |                       | • Scenarios (from the latest version)  
|                       |                       | • Products  
| Regular               | Template              | • General information  
|                       |                       | • Metrics  
|                       |                       | • Attachments  
| Template              | Template              | • General information  
|                       |                       | • Metrics  
|                       |                       | • Attachments  
| Template              | Regular               | • General information  
|                       |                       | • Metrics  
|                       |                       | • Attachments  

**Note**

When you perform a **Save As** operation, irrespective of the type of portfolio, the planning period is not copied.
Develop Product Portfolio

Develop Product Portfolio: Overview

A product portfolio consists of a set of products, product concepts, and a defined team. In the Develop Product Portfolio activity, the portfolio manager can evaluate products and product concepts in order to determine the best ones to develop. Product portfolio development involves:

<table>
<thead>
<tr>
<th>Task</th>
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<tr>
<td>Develop Product Portfolio Structure</td>
<td>• Add products and product concepts (proposals) to a portfolio, and assemble a portfolio team.</td>
</tr>
<tr>
<td></td>
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<td>• Edit a scenario based on the analyses displayed for the scenario in terms of value, balance, strategy analysis, resource consumption, and product mix.</td>
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<td></td>
<td>• Compare different scenarios in terms of portfolio metrics.</td>
</tr>
<tr>
<td></td>
<td>• Generate What-if scenarios to adjust each product portfolio scenario using various types of analyses.</td>
</tr>
</tbody>
</table>

Net Present Value: How It Is Calculated

The Net Present Value is calculated as the difference between present value of cash inflows and the present value of cash outflows.

Settings That Affect Net Present Value

There are three factors that affect the net present value:
• Cash flow
• Discount factor
• Number of years

How Net Present Value Is Calculated

In the application, NPV is calculated using the Newton-Rhapson algorithm. The net present value is derived from the equation:

\[ \text{NPV} = C(0) + \frac{C(1)}{1+d} + \frac{C(2)}{(1+d)^2} + \ldots + \frac{C(n)}{(1+d)^n} \]

The variables in the equation are described as:

• \( c \) - cash flows for the product wherein Revenue is considered positive and Cost is considered negative

• \( d \) - discount factor

• \( n \) - number of years in future

The value \( n \) is calculated based on the trend defined for it. Since we are considering the trend to be Point trend, the trend date is the same as start date. The following explanation is how to calculate the value of \( n \).

\[ n = \frac{\text{Start Date} - \text{Baseline Date}}{365} \]

If the Start Date of the Cost or Revenue is less than the Baseline Date you will ignore the rows. If the Start Date of the Cost or Revenue is less than or equal to one year after the Baseline Date, then the value of \( n \) is equal to 0 (it is the first year). One day beyond the first year will increment \( n \) to 1. If the Start Date of Cost or Revenue is less than or equal to two years after the Baseline Date, then the value of \( n \) increments to 2 and so on and so forth. One day beyond the second year will increment \( n \) to 2 and so on and so forth. You will then total the rows that have the same \( n \) value and apply the formula.

Example

1. Calculating number of years

Consider the following scenario with a fixed baseline date as January 01, 2012. For varying start dates, the value of \( n \) is determined as:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Cost</th>
<th>Number of Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 01, 2012</td>
<td>140</td>
<td>0</td>
</tr>
<tr>
<td>April 03, 2010</td>
<td>300</td>
<td>-2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Revenue</th>
<th>Number of Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 01, 2015</td>
<td>200</td>
<td>3</td>
</tr>
<tr>
<td>April 03, 2010</td>
<td>300</td>
<td>-2</td>
</tr>
</tbody>
</table>

Note
If the number of years is negative, the corresponding values of cost and revenue are not considered for NPV calculation.

2. Calculating cash flow

All the costs and revenue for the same number of years is grouped to determine the cash flow. Using the value n obtained above, the cash flow is calculated as:

<table>
<thead>
<tr>
<th>Number of Years</th>
<th>Cash Flow (Revenue - Cost)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>-140</td>
</tr>
<tr>
<td>3</td>
<td>200</td>
</tr>
</tbody>
</table>

3. Calculating NPV

After you determine the values for cash flow, and assuming the discount rate to be 0.1, you can calculate NPV using the equation above and arrive at a value of 10.26.

Internal Rate of Return: How It Is Calculated

The Internal Rate of Return is the rate at which the Net Present Value is equal to zero. The IRR is also defined as the discount rate at which present value of all future cash flow is equal to the initial investment.

Settings That Affect Internal Rate of Return

There are three input variables that affect the internal rate of return:

- Cash flow
- Number of years
- Net Present Value

How Internal Rate of Return Is Calculated

The internal rate of return is derived with the same equation that is used to calculate the net present value. The NPV is derived from the equation:

\[
\text{NPV} = C(0) + \frac{C(1)}{(1+r)} + \frac{C(2)}{(1+r)^2} + \ldots + \frac{C(n)}{(1+r)^n}
\]

The variables in the equation are described as:

- \( c \) - cash flows for the product wherein Revenue is considered positive and cost is considered negative
- \( r \) - internal rate of return
- \( n \) - number of years in future

You can determine the internal rate of return by setting NPV to 0. The application uses the guess approach using Divide-and-Conquer method where
an assumption is made on the discount rate in order to arrive at zero net present value. The adjustment factor or the guess factor that results in zero NPV is considered to be the internal rate of return.

**Example**

Consider a scenario where the guess factor or the discount rate is 0. By setting this, if the resulting NPV is negative, the discount rate is increased to 10 and the NPV is recalculated. With the discount rate as 10, if the NPV turns out to be positive, you can determine that the range where NPV will tend to 0 is between 0 and 10.

Now that you have determined the probable range, the discount rate is further adjusted to determine a closer range where NPV tends to 0. Consider the discount rate to be 1. With this value replaced as the discount rate, consider that the resulting NPV is negative. It implies that the discount rate can be further increased to 2 to obtain a positive NPV. If the resulting NPV is 0, the discount rate is considered to be 2.

Consider another scenario where NPV is negative when you give incremental discount rates as 0, 10, and 20. With the discount rate as 30, if the NPV results in a positive value, you can determine the range of the discount rate to be between 20 and 30. Let us consider the discount rate to be 21 for which the NPV turns out positive. The possibility of finding the value of the discount rate resulting in NPV to be 0 is now between 20 and 21. Incremental values of 20.1, 20.2 and 20.3 are now given as the discount rate and NPV is recalculated. If the NPV is 0 with discount rate 20.3, the value of IRR is considered to be 20.3.

**Scenario Baseline Date: How It Determines Metric Values**

The baseline date that you select while editing a scenario is used in scenario analysis to calculate product and portfolio metrics such as Net Present Value.

**Settings That Affect Baseline Date**

The creation date of a product proposal is considered as baseline date for the product proposal. When you add a product proposal to a scenario, the product proposal baseline date is overwritten with the baseline date that you provided for the scenario. This initiates the product proposal metrics in the **Elements** table to be recalculated. Changing the scenario's baseline date will update the baseline date for all of its elements. The scenario metrics will also be updated accordingly.

**Note**

Changing the product baseline date will recalculate the metrics associated with that product once you save the product portfolio.

**How the Baseline Date Determines Metric Values**

Baseline date is an important factor to calculate various portfolio and product metrics. The baseline date is used to calculate Net Present Value, Internal Rate
of Return, and Break Even Time for product proposals and products in the Elements table.

**Break Even Time: How It Is Calculated**

Break even time is the period when the running addition of calculated value of revenues become equal to the total development projected costs.

**Settings That Affect Break Even Time**

There are four factors to be considered while calculating the break even time:

- Projected costs for product
- Revenue
- Discount rate
- Baseline date

**How Break Even Time Is Calculated**

The break even time is calculated by adding the calculated values of all revenues over time using discount rate and the number of years to the total development projected costs provided for the product.

**Example**

Consider a scenario with discount rate as 0. To determine the Break Even Time, follow the steps below:

1. Calculate the number of years using the equation:
   
   \[ n = \frac{(\text{Start date} - \text{Baseline date})}{365} \]

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Revenue</th>
<th>Number of Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 01, 2012</td>
<td>200</td>
<td>0</td>
</tr>
<tr>
<td>January 01, 2013</td>
<td>300</td>
<td>1</td>
</tr>
<tr>
<td>January 01, 2014</td>
<td>400</td>
<td>2</td>
</tr>
</tbody>
</table>

2. Determine the calculated revenue using the equation:
   
   \[ \text{Calculated Revenue} = \frac{1}{(1 + d)^n} \]

   Since the discount rate is 0, the calculated revenue is the same as the actual revenue.

<table>
<thead>
<tr>
<th>Number of Years</th>
<th>Calculated Revenue</th>
<th>Running Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>200</td>
<td>200</td>
</tr>
<tr>
<td>1</td>
<td>300</td>
<td>500</td>
</tr>
</tbody>
</table>
The period during which the running revenue is equal to the projected development cost is January 01, 2013. Considering this date and the baseline date, the payback period is calculated as:

Payback Period = X - Baseline Date

Where X is the period where the running revenue is equal to projected development cost

With X as January 01, 2013 and baseline date as January 01, 2012, the payback period is calculated to be 1 year.

Consider another scenario with discount rate as 0.1. To determine the Break Even Time, calculate the number of years as shown in the above scenario. After determining the value of n, follow the steps below:

1. Determine the calculated revenue using the equation:

   Calculated Revenue = 1 / (1 + d) ^ n

   With the discount rate as 0.1, determine the calculated revenue and the running revenue.

<table>
<thead>
<tr>
<th>Number of Years</th>
<th>Calculated Revenue</th>
<th>Running Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>200</td>
<td>200</td>
</tr>
<tr>
<td>1</td>
<td>272.73</td>
<td>472.73</td>
</tr>
<tr>
<td>2</td>
<td>330.58</td>
<td>803.31</td>
</tr>
</tbody>
</table>

2. Calculate the linear factor

   The values that are closer to the projected development cost are 472.73 and 803.31. Consider these values as the lower value and the higher value respectively and determine the linear factor using the equation:

   Linear Factor = ((Projected Development Cost - Lower Value) / (Higher Value - Lower Value)) * 365

   In this example, the resulting linear factor is 30.10.

3. Calculate linear date

   The linear date is calculated using the equation:

   Linear Date = Y + Linear Factor

   Here Y is the start date of the lower value.

   In this example, the linear date is January 31, 2013.

4. Calculate the Break Even Time using the equation:

   Break Even Time = (Linear Date - Baseline Date) / 365
In this example the Break Even Time is determined as 1.09 years.

**Payback Period: How It Is Calculated**

Payback period is the period when the running addition of revenues become equal to the total development projected costs.

**Settings That Affect Payback Period**

There are two factors that affect the payback period:

- Development projected costs
- Revenues

**How Payback Period Is Calculated**

Payback period is calculated by adding the revenues in time to the total development projected costs for product or portfolio.

**Example**

Consider the following scenario where January 01, 2012 is the fixed baseline date. If the projected development cost is 500, the running revenue is calculated as:

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Revenue</th>
<th>Running Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 01, 2012</td>
<td>200</td>
<td>200</td>
</tr>
<tr>
<td>January 01, 2013</td>
<td>300</td>
<td>500</td>
</tr>
<tr>
<td>January 01, 2014</td>
<td>400</td>
<td>900</td>
</tr>
</tbody>
</table>

The period during which the running revenue is equal to the projected development cost is January 01, 2013. Considering this date and the baseline date, the payback period is calculated as:

Payback Period = X - Baseline Date

Where X is the period where the running revenue is equal to projected development cost

With X as January 01, 2013 and baseline date as January 01, 2012, the payback period is calculated to be 1 year.

**Editing Product Record using Oracle ADF Desktop Integration spreadsheet: Explained**

You can modify all records in the Elements table using the Oracle ADF Desktop Integration spreadsheet. The product proposal rank and priority can only
be updated. You can insert, delete and update cost, revenue and resource information.

FAQs for Analyze Product Portfolio

What's an Annual Discount Rate?

Annual discount rate is the discount rate given to future cash flows to convert them to present cash flows.

Can I modify all information related to product and portfolio to view the changes in the analytic charts?

No. For a portfolio you can provide business related information, select the time period, include target revenues, and target costs. For a product proposal you can include projected and actual costs, resources, and revenues.
Define Product Road Map

Develop Product Road Map: Overview

In the Define Product Road Map activity, the portfolio manager can generate road maps for each local product portfolio when the corporate product portfolio is approved and published. Defining a product portfolio road map involves:

<table>
<thead>
<tr>
<th>Task</th>
<th>What you can do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit Product Portfolio</td>
<td>• Identify the specific product portfolio version.</td>
</tr>
<tr>
<td></td>
<td>• Submitted the product portfolio for approval.</td>
</tr>
<tr>
<td>Approve Product Portfolio</td>
<td>• Review product portfolio sent for approval.</td>
</tr>
<tr>
<td></td>
<td>• Approve or reject product portfolio scenario.</td>
</tr>
<tr>
<td></td>
<td>You can comment on reasons for approval or rejection.</td>
</tr>
<tr>
<td>Generate Road Map</td>
<td>• View road map generated according to the product mix for the selected scenario.</td>
</tr>
</tbody>
</table>
Product Proposal Versioning: Explained

Versioning a product proposal enables you to store and track all changes that take place during the review and approval process. It helps in capturing and retrieving the evolution information of a product proposal. You can view previous versions of the product proposal irrespective of the product proposal version you are currently on. When you look at the concept version, only the latest version of the concept is displayed. You can add only the latest version of the product proposal to a scenario and you can save an older version of a product proposal into the latest version.

Points to remember on product proposal versioning:

**Product Proposal and Product Concept**

A product proposal and a product concept work in unison, but they can follow independent versioning.

**Save As**

When you do a Save As on a specific version of a product proposal, you can select any existing version of a product proposal.

**Publish from Portfolio**

When you publish a product proposal from a portfolio, a new product proposal version is created.

**Search**

When you search for a product proposal, the latest version of the product proposal is displayed in the search results.
FAQs for Develop Product Business Proposal Versions

What's the difference between product proposal Save As and product proposal Save As New Version?

With the **Save As** option, you can create a new product proposal and change the concept type. You can also selectively pick the contents of the product concept and the product proposal.

By selecting the **Save As New Version** option, you can only create a new version of the selected product proposal.

What happens if I publish a product in the Elements table?

When a product or element is published, the selected product of the scenario is published to the original product proposal and a new version of the original product proposal is created. A product can be published only if the scenario is in current state.

A product proposal of any state can be copied to a scenario. You can update cost, revenue, business details and resource information for the product proposal that you added in the **Elements** table. When you publish an element all changes are captured and sent to the original product proposal as a new version.

**Note**

You can multi-select the rows and publish.

Can I create a new version of a product proposal that is in submitted state?

No. You can create a new version of a product proposal when it is in either draft, approved or in the rejected state.
Define Product Innovation

Manage Planning Periods: Explained

Product portfolio planning period is the time period during which the portfolio objects collect data for analysis. Before defining a planning period, you are required to create planning period units. You provide start date, number of units and specify the duration, which can be either monthly or quarterly to create planning period time units. The planning period time units are created with default labels. You can add time units for a previously created planning period unit by providing the number of units before the first unit or by providing the number of units after the last unit.

Note
After you have created a planning period unit specifying a duration, you cannot make further changes except for changing the names of the units.

To create a planning period, provide the start date planning period unit, end date planning period unit, and select the planning period unit from the choice list.

Impact of planning period and planning period units:

• The columns in the **Manage Resource Capacity** table is dynamically created and displayed based on the number of planning period units defined in the planning period for the portfolio.

• The timeline in the Schedule Gantt, Resource Gantt and Launch Gantt is decided based on the number of planning period units defined in the planning period for the portfolio.

Manage Product Portfolio Metrics: Explained

Oracle Fusion Innovation Management offers you various out-of the box product and portfolio metrics that you can enable for your portfolio management. You can set up both product and portfolio metrics to make it available as pre-defined selections to choose from. You can also set the minimum and maximum threshold values for portfolio and product metrics associated with the product portfolio in order to evaluate it. You must enter values for portfolio metrics at the portfolio level.

Based on the input variables, metrics are categorized as:

• Derived
• Derived and Rolled up
• User entered

Some of the derived metrics are calculated using fixed formulas, while some metrics can be configured using rules framework.
<table>
<thead>
<tr>
<th>Metric Name</th>
<th>Metric Type</th>
<th>Formula Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Derived</td>
<td>Fixed</td>
</tr>
<tr>
<td>Internal Rate of Return, Return on Investment, Payback Period</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portfolio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Projected Margin</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product Resource Value Index, Cost Value Index, Expected Commercial Value, Resource productivity index, Cost productivity index, Product Strategic Fit</td>
<td>Derived</td>
<td>Configurable using rules framework</td>
</tr>
<tr>
<td>Portfolio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Value Index, Cost Value Index, Expected Commercial Value, Resources productivity index, Cost productivity index, Portfolio Strategic Fit</td>
<td>Derived</td>
<td></td>
</tr>
</tbody>
</table>

There are metrics that have fixed formulae and are derived from certain values that you enter, for example, start and end dates, and then rolled up.
<table>
<thead>
<tr>
<th>Metric Name</th>
<th>Metric Type</th>
<th>Formula Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Derived and Rolled Up</td>
<td>Fixed</td>
</tr>
<tr>
<td>Portfolio</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Competitive Advantage, Alignment, Impact, Supply Chain Fit, R &amp; D Know How, Actual Margin, Cost Deviation, Margin Deviation, Probability Of Technical Success, Probability Of Commercial Success, Revenue Deviation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The user entered metrics can be configured using rules framework.

<table>
<thead>
<tr>
<th>Metric Name</th>
<th>Metric Type</th>
<th>Formula Calculation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>User entered</td>
<td>Configurable using rules framework</td>
</tr>
<tr>
<td>Business Unit Strength, Market Attractiveness, Score</td>
<td>User entered</td>
<td>Configurable using rules framework</td>
</tr>
</tbody>
</table>