# Initiative Management

## User Guide

Changepoint PPM 2020

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# 1. Initiative Setup

## About initiatives

Initiatives define the cross charge, reference information, split charging, revenue recognition and approval rules for client projects. You can create multiple initiatives for each client, and multiple projects for each initiative. You must set up initiatives before you can create projects.

### Initiative icons

The following icons represent specific types of initiatives and display beside the initiative names in the tree view.

| Icon | Description |
|---|---|
| | Chargeable initiative. |
| | Phantom initiative. Phantom initiatives are automatically created when split charging is being set up. For information, see "About setting up split charges" on page 33. |
| | Unchargeable initiative. |
| | Initiative template, which can be used to create an initiative. |

## Accessing an initiative

1. Click **Program Management** > **Initiatives**.

   The **Initiatives** tree view displays the initiatives grouped by category and then by client.

2. Expand the tree view and select the initiative.

   The initiative profile appears.

## About specifying limits for amounts and effort to be cross charged

You can specify limits for cross charge amounts, effort, and quantities to be cross charged for an initiative. You can configure each limit to display a warning and/or to reject the cross

charge if the limit is exceeded.

You can set the limits for the following items:

- Cross charge amounts for all items
- Cross charge amounts for time
- Cross charge amounts for request time
- Cross charge amounts for non-labor items
- Cross charge amounts for expenses
- Cross charge amounts for fixed fees
- Cross charge amounts for additional items
- Effort for time (project-related)
- Effort for request time
- Quantity of non-labor items
- Quantity of expenses

## Creating an initiative

You can create an initiative by completing and saving the mandatory general information first and then adding to the initiative as required.

1. Click **My Tools** > **New** and then select **Initiative**.

   The **Create Initiative** dialog box displays the **General** tab.

2. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, General tab options" on page 9.

3. Click **Save**.

4. To continue completing the initiative, see the following topics:

   - "Create/Edit Initiative dialog, Reference tab options" on page 12
   - "Create/Edit Initiative dialog, Cross charge information tab options" on page 21
   - " Create/Edit Initiative dialog, Approvals tab options" on page 58
   - "Managing access to an initiative" on page 59

- Projected resources topics in the *Resource Management User Guide*

## Create/Edit Initiative dialog, General tab options

| Option | Description |
|---|---|
| **Client** type-ahead field | Client for the initiative. |
| **Main contact** list | Contact from the client. |
| **Initiative name** field | Name of the initiative. |
| **Alternate name** field | Alternate name for the initiative. |
| **Description** field | Description of the initiative. |
| **Cost structure** type-ahead field | Cost structure for the initiative, which controls the cross charge and cost rates and workflow information. |
| **Initiative status** list | Status of the initiative. |
| **Initiative manager** type-ahead field | Resource responsible for managing the initiative. The initiative manager is responsible for approving all cross charges related to the initiative. |
| **Staffing workgroup** type-ahead field | Staffing workgroup for the initiative, which is used for resource demand calculations. By default, this is the workgroup of the initiative manager. |
| **Initiative category** list | Category of the initiative. |
| **Initiative ID** field | ID of the initiative. |
| **Work performed for** type-ahead field | Client for which the work is performed, if different from the one specified in the **Client** field. |
| **Associated Initiative** type-ahead field | The initiative associated with, or the initiative template used to create, the current initiative. |
| **Additional contact** field | Additional client contact such as a project sponsor. |

| Option | Description |
|---|---|
| **Internal contact** type-ahead field | Name of the resource from your organization who interacts with the client. |
| **Request** field | Request number of the originating request, if applicable. |
| **Candidate** list | Updates the initiative fields with data from the selected candidate. Used when the initiative results from a candidate. |
| **Enable auditing** check box | When selected, additional audit requirements are enforced. For more information, see "About audit tracking" on page 10. **Note:** Once you save the initiative with auditing enabled, auditing cannot be disabled. |
| **Template** check box | When selected, identifies the initiative as a template. Initiatives that are marked as templates display the template icon in the tree view. |
| **Operations center** list | The default operations center to handle issues for the initiative, which automatically displays on the requests created for this initiative. |
| **Allow operations center override** check box | When selected, resources can change the operations center for requests for the initiative. |
| **Consider request time as a capital cost** check box | When selected, the time entered for requests for the initiative are designated as capital costs. |

## About audit tracking

If you require additional audit tracking of time and expenses, and of and changes to the initiative and its projects and tasks, you can select the audit option. When you select the **Enable auditing** check box, the effective date is displayed on the initiative and the following requirements are enforced:

- Time entered for project tasks must have a description, and all changes to time entries must include a comment

- Expenses must have a description, and all changes to expense entries must include a comment
- Changes to time and expense entries are tracked in the history
- Rejected time entries, expense line items and expense reports must include a reason for the rejection, which is tracked in the history
- Changes to rates must include a comment
- Cross charges must have descriptions

In addition, the following initiative fields are tracked:

- Main contact
- all fields on the **Reference** tab
- Split cross charge status
- Cross charge address
- Date to use for tax calculation.

The **Audit** check box displays if the option has been enabled on the cost structure for the initiative.

**Note:** After the initiative has been saved with the **Enable auditing** check box selected, the audit functionality cannot be disabled.

## Defining reference information for an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Reference** tab.
3. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Reference tab options" on page 12.
4. Click **Save**.

### Create/Edit Initiative dialog, Reference tab options

| Field | Description |
|---|---|
| **Reference number** field | Reference number |
| **Approved amount** field | Total monetary amount to be generated by the initiative, excluding taxes. If the **Use two-level approval if approved amount is exceeded** check box is selected on the **Approvals** tab, this amount is checked against the cross charged amounts. This amount also determines when threshold warning emails and Changepoint notifications are sent. |
| **Reference type** list | Type of reference. |
| **Start date** field | Start date. |
| **End date** field | End date. |
| **Approved limits** section | Maximum amounts for cross charge amounts, effort, and quantities for the cross charge items. For more information, see "About specifying limits for amounts and effort to be cross charged" on page 7. |
| **Updates** field | Reasons for changes made to the initiative, main contact, or cross charge address. |
| **History** field | Displays the changes made to several fields. For more information, see "About editing an initiative" on page 12. |

## About editing an initiative

This topic describes the general guidelines and rules for editing initiatives.

### Changing the initiative status

The list of available initiative status options is determined by your organization. Changing the initiative to the following statuses affects the initiative as follows:

- **Prospect** – Work with the client begins.
- **Probable** – The initiative negotiations begin.

- **Booked** – The initiative is signed.
- **Work in progress (WIP)** – The initiative is being worked on and cross charging can begin, where applicable.
- **Completed** – The initiative is completed. If there are projects under the initiative in **Draft** or **Active** status, a warning message displays. The status of the projects, however, does not automatically change. To prevent resources from entering time or expenses against completed projects and tasks, you must edit the projects and tasks manually to mark them as **Completed** or **Inactive**.
- **Inactive** – all projects with **Active** status are set to **Inactive**. The project manager for each affected project is notified of the change by email. No new projects can be created for the initiative, and the status of existing projects cannot be changed. If the initiative status is subsequently changed to an active status, you can reactivate the projects manually.
- **Closed** – all projects with **Active** status, are set to **Completed**, and tasks are marked as **Completed** and **Locked**. The project manager for each affected project is notified of the change by email. No new projects can be created for the initiative, and the status of existing projects cannot be changed. If the initiative status is subsequently changed to an active status, you can reactivate projects and tasks manually.

### Locking initiatives

When an initiative is being edited, and when an initiative is selected during the cross charging process, the initiative is locked to prevent problems with several resources making changes at the same time.

### Changing the cost structure

Only the initiative manager can change the cost structure, and only when there is no cross charging in process. All cross charges must be either committed, sent, partial paid, paid or archived, and all the time, expenses, request time, requests, initiativenon-labor items and fixed-fee records must be fully cross charged.

When you change the cost structure, you can choose to remove all existing cross charge rates and projected resources from the initiative, or keep the existing cross charge rates and projected resources.

### Changing the chargeable status

When you change the chargeable status for an initiative, and the option to allow project managers to override the chargeable status *is not* selected, then the chargeable status is changed accordingly for all of the existing projects, tasks, and request processing rules for the initiative.

If the option to allow project managers to override the chargeable status is selected, then the chargeable status for all of the existing projects, tasks, and request processing rules for the initiative remains the same.

### Changing the currency or revenue recognition method

After revenue has been recognized for an initiative, no changes are allowed to the selected currency or the revenue recognition method for fixed fees or non-labor items. The charge amounts cannot be reduced to less than the revenue already recognized.

### Changes to split charges

The **Split charges** option on the **Cross charge information** tab can be changed only if no cross charges have been created or if all existing cross charges have been committed.

If **Split charges** has been selected for an initiative:

- The **Chargeable** option cannot be changed if there are any cross charges under the initiative or phantom initiative which are **Draft**, **Pending approval**, **Pending second-level approval**, and **Approved** or if all cross charges are committed, but there are time, expenses, request time, requests, initiativenon-labor items, and/or fixed fee schedules under the initiative or phantom initiative that have not been fully cross charged.
- The **Cost structure** field in the **General** tab and **Charge type** field in the **Cross charge information** tab can be edited only when all line items for the initiative or phantom initiative are all fully cross charged.

## Editing an initiative

1. Access the initiative.
2. Click **Actions** > **Edit**.
3. Make the necessary changes.
4. Click **Save**.

# Deleting an initiative

It is recommended that you keep initiatives for historical data purposes. However, you can delete an initiative provided that the following are true:

- the initiative status is **Closed**
- all chargeable items such as time and expenses have been cross charged and the cross charge has been archived
- there are no projects for the initiative in **Draft** or **Active** status
- cross charge status of the time entered for the initiative has been resolved

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click **Delete**.
3. Click **OK** to confirm.

# About copying initiatives

You can create a new initiative by copying an existing initiative. You can decide which information you want to keep the same and which you want to change, with some limitations.

The following information is automatically copied to the target initiative:

- The cost structure, remit-to address and expense GL account
- The **Date to use for tax calculation** setting from the **Cross charge information** tab.

## Copying an initiative

1. Access the initiative.
2. Click **Actions** > **Copy**.

   The **Copy Initiative** dialog box appears.

3. In the **New information** tab, make the necessary changes. For more information, see "Create/Edit Initiative dialog, General tab options" on page 9.
4. By default, the new initiative is associated with the source initiative. To remove this association, clear the **Associate this initiative with the original initiative** check box.
5. Click the **Additional information to copy** tab.

6. To prevent information from being copied to the target initiative, clear the corresponding check boxes. For more information, see "Copy Initiative dialog, Additional information to copy options" on page 16.
7. Click **Save**.

   After the information is copied, you can edit the new initiative and make any required changes. For example, you can identify which users have access to the initiative, or activate revenue recognition.

## Copy Initiative dialog, Additional information to copy options

| Option | Copies information from |
|---|---|
| **Select all/Deselect all** check box | Selects all or clears all check boxes on the tab. |
| **Initiative category** check box | When selected, copies information from the field in the **General** tab. |
| **Reference number** check box | When selected, copies information from the field in the **Reference** tab. |
| **Reference type** check box | When selected, copies information from the field in the **Reference** tab. |
| **Approved amount** check box | When selected, copies information from the field in the **Reference** tab. |
| **Two-level approval information** check box | When selected, copies information from the field in the **Approvals** tab. |
| **Allow project managers to specify the time approver** check box | When selected, copies information from the field in the **Approvals** tab. |
| **Prevent tax changes on Cross charges** check box | When selected, copies information from the field in the **Cross charge information** tab. |
| **Initiative access** check box | When selected, copies information from the **Access** tab. |

| Option | Copies information from |
|---|---|
| **Request processing rules** check box | When selected, copies the request processing rules from the **Request processing rules** tab. |
| **Request SLA information** check box | When selected, copies the request SLA information from the **Request SLA** tab. |
| **Projected resources information** check box | When selected, copies the projected resources information from the **Projected resources** tab. |
| **Start date for projected resources** field | Sets the earliest start date of resources in the projected resources. The start and end dates for the remaining resources are determined based on this date. For more information, see "About copying date-based information for initiatives" on page 18. |
| **Cross charge rate information** check box | When selected, copies information from the **Cross charge rates** tab. Rates are copied for active staffing levels or resources only. |
| **Override cost structure** check box | When selected, copies the cost structures that are selected for cross charge rates on the **Cross charge rates** tab and are different from the initiative's cost structure.<br>Otherwise, only the cost structures from the initiative are copied.<br>Either **Cross charge rate information** or **Projected resources information** must be selected for this option to be available. |
| **Fixed-fee schedule information** check box | When selected, copies the fixed fee schedule information from the **Fixed-fee schedule** tab. |
| **Start date for fixed fee schedule** field | Sets the earliest start date of fixed fee items. The dates of the remaining items are determined relative to this date. |
| **Fixed-fee schedule items** check box | When selected, copies the schedule items for fixed fee deliverables. |

| Option | Copies information from |
|---|---|
| **Non-labor item information** check box | When selected, copies the non-labor item Information from the **Non-labor items** tab. |
| **Start date for non-labor items** field | Sets the earliest start date of non-labor items. The dates of the remaining items are determined based on this date. |
| **Configurable fields information of the initiative** check box | When selected, copies the configurable code and text field values. If the fields are mandatory, then this check box cannot be cleared. |

## About copying date-based information for initiatives

When date-based information is copied for an initiative, the earliest dated item on the source is copied to the target with the date that is specified on the **Additional information to copy** tab. The start dates for the remaining items are determined based on the relative period of time between their dates and the earliest dated item on the source. The end dates for target items are determined based on the relative period of time between the start and end dates for the source items.

For example, for projected resources, the resource on the source initiative that has the earliest start date will be scheduled to start on the target initiative on the date selected in the **Start date for projected resources** field. The start dates for the remaining resources on the target initiative are determined based on the relative period of time between the start date of the first resource and the start date of the remaining resources on the source initiative. The end dates for all resources are calculated by adding the scheduled days to the start dates.

# Initiative troubleshooting

### You cannot change a cross charge rate or enter a discount for a cross charge rate

The option to prevent resources from changing cross charge rates has been enabled on the cost structure for the initiative.

### A client is not available when you are creating an initiative

If access controls have been set for cost structures, then only the clients associated with cost structures to which you have access, and clients that do not have a cost structure, are available when you are creating an initiative.

If access to the client is restricted to a selected list of resources, and you are not in the list, the client is not available for selection when you are creating an initiative.

### You cannot change the options related to resource requests and task restrictions

Once an open task has been created for an initiative, then the following options related to resource requests and restrictions can no longer be changed on the initiative:

- **Enable resource requests at project level** check box
- **Enable resource requests at task level** check box
- **Override task restriction** check box

### You cannot create open tasks

Before you can create open tasks for an initiative, the **Override task restriction** check box on the **Projected resources** tab must be selected.

# 2. Initiative Cross Charge Information

## Entering cross charge information for initiatives

You can specify the cross charge format, type, cross charge address, and whether cross charges are split with another client.

1. Access the initiative for editing

   The **Edit Initiative** dialog box appears.

2. Click the **Cross charge information** tab.

3. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Cross charge information tab options" on page 21.

4. To set up email recipients for batch cross charging, see "Setting up email recipients for batch cross charging" on page 26.

5. Click **Save**.

### Create/Edit Initiative dialog, Cross charge information tab options

| Option | Description |
|---|---|
| **Currency** list | Currency to be used for cross charges. By default, this is the currency specified for the cost structure that is associated with the initiative. |
| **Chargeable** check box | When selected, cross charges can be created for the initiative. |
| **Allow project managers to override the [Chargeable] status** check box | When selected, project managers can change the chargeable setting for their projects under the initiative. This option is available only if the **Chargeable** check box is selected. |
| **Enable cross charging** check box | When selected, batch cross charging is allowed for the initiative. This option is available only if the **Chargeable** check box is selected. |

| Option | Description |
|---|---|
| **Split charges** check box | When selected, indicates that cross-charge amounts will be split among multiple clients. This option is available only if the **Chargeable** check box is selected. |
| **Cross charge type** list | Specifies the cross charge type, which determines how cross charges are calculated. For more information, see "About cross charge types for initiatives" on page 27. |
| **Use daily conversion rates from the cost structure** check box | When selected, the daily conversion rates from the cost structure are used to convert hours to days for cross charging. When cleared, the daily conversion factor of the resource is used.<br>Available only when the daily or mixed fixed fee/daily cross charge type is selected. The setting can only be changed either before an cross charge or credit note has been created for the initiative, or after all cross chargesand credit notes for the initiative have been committed. |
| **Group time entries by project and resource** check box | When selected, the daily conversion rate applies to the total time entries with the same cross charge rate grouped by project and date for each resource. |
| **Force fixed fee selection** check box | When selected, resources must specify a fixed fee when creating tasks for projects under the initiative, and when creating a fixed fee request processing rule for the initiative.<br>Available only when the fixed fee, mixed fixed fee/daily, or mixed fixed fee/hourly cross charge type is selected.<br>If your organization uses the **Effort expended** method for revenue recognition, the **Force fixed fee selection** check box must be selected so that chargeable time on tasks can be linked to fixed-fee deliverables. |

| Option | Description |
|---|---|
| **Expense cross charge** list | Specifies the portion of the expenses for the initiative that will be cross charged to the client. Options include:<br>• **All expenses**<br>• **No expenses**<br>• **Percentage of expenses** |
| **Expense cross charge (%)** field | Percentage of expenses that will be cross charged to clients. This field is editable only if **Percentage of expenses** is selected in the **Expense cross charge** list. |
| **Maximum per cross charge** field | Maximum amount, in the currency of the initiative and excluding taxes, for each cross charge. |
| **Enforce** check box | When selected, prevents a cross charge that exceeds the maximum amount from being submitted for approval. When cleared, a warning message is displayed only. The maximum amount must be specified in the **Maximum per cross charge** field. |
| **Payment terms** list | Specifies the payment terms for cross charges. The default payment term comes from the cost structure. |
| **Cross charge format** list | Specifies the format for cross charges. The default format comes from the cost structure. |
| **Special instructions to cross charger** field | Instructions for the resource who creates and prints the cross charge. These instructions display in the **Cross Charge** dialog box. |
| **Default cross charge description** field | Description that appears on all cross charges. |

### Email Recipients for Batch Cross Charging section

For more information, see "Setting up email recipients for batch cross charging" on page 26.

### Cross Charge Rate Information section

| Option | Description |
|---|---|
| **Default staffing level for tasks** field | Default staffing level for all resources assigned to projects and tasks of the initiative. The project manager can override this default value and assign a specific staffing level to each resource when creating task assignments. |
| **Cost center** type-ahead field | Cost center whose burden rates you want to use with cross charge rates for this initiative. |
| **Include overtime (%)** check box and field | When selected, the percentage rate specified in the field applies to the standard cross charge rate for overtime. For example, if the standard cross charge rate is 80, and the overtime rate is 120, you would enter 150 because 120 is 150% of 80. Available only for hourly cross charge types. |
| **Auto-update cross charge rates** check box | When selected, the cross charge rates are automatically updated whenever the cross charge rates are changed in Changepoint Administration. |
| **Auto-update cost rates** check box | When selected, the cost rates are automatically updated whenever the cost rates are changed in Changepoint Administration. |

### Address Information section

| Option | Description |
|---|---|
| **Remit-to address** field | Address to which clients send remittances for cross charges.<br>To view the full address, point to the **Remit-to address** field. |
| **Cross charge Address** field | Address to which the cross charge is sent. |
| **Client address** option<br>**Main contact address** option | Specifies whether the cross charge is sent to the client address or the main contact address. |

| Option | Description |
|---|---|
| **Include contact name on the cross charge** check box | When selected, the main contact's name is displayed on cross charges for the initiative. |
| **Allow project managers to specify the cross charge contact** check box | When selected, project managers can change the cross charge contact for their projects under the initiative. |
| **Prevent tax changes on cross charge** check box | When selected, prevents changes to tax amounts on cross charges. |
| **Date to use for tax calculation** options | Date to use for tax schedules and tax rates for cross charges:<br>• Cross charge date – date of the cross charge<br>• Record date – date of the individual items on the cross charge, for example, the date of the expense item |
| **Method of tax calculation** options | Method to use for tax schedules and tax rates for cross charges:<br>• Calculate tax on each item separately – the tax amount is calculated separately for each cross charge item.<br>• Calculate tax on total amount of items – the tax amount is calculated on the total amount for all cross charge items. All items must have the same tax schedule.<br>Depending on the selected method for tax calculation, the total may differ and an adjustment is created to balance the sum of the cross charge items and the calculated amount. |

### Charge-to Location section

| Option | Description |
|---|---|
| **Work location group** list | Work location group of the client to be cross charged. |
| **Work location** list | Work location of the client to be cross charged. |

### Cross charge Distribution GL Accounts section

| Option | Description |
|---|---|
| **Project time** list | GL accounts to which cross charge amounts for project time will be distributed. |
| **Request time** list | GL accounts to which cross charge amounts for request time will be distributed. |
| **Expenses** list | GL accounts to which cross charge amounts for expenses will be distributed. |
| **Non-labor items from requests** list | GL accounts to which cross charge amounts for non-labor items that are associated with requests will be distributed. |
| **Additional items** list | GL accounts to which cross charge amounts for additional items will be distributed. |

## Setting up email recipients for batch cross charging

You can set up a list of recipients for the cross charges that are created for an initiative during the batch cross charging process. You can enter email addresses manually or search for the email addresses of resources and contacts. When defining the email, the subject is required.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Cross charge information** tab.

3. To search for recipients:

   a. In the **Email Recipients for Batch Cross Charging** section, do one of the following:

      - To search for contacts in the client organization of the initiative, select **<Client name> contacts**.
      - To search for recipients in the list of all contacts, select **All contacts**.
      - To search for recipients among resources in your organization, select **Resources**.

   b. In the **Recipients** field, do one of the following:

      - To view the entire list, click in the type-ahead field and then press **Enter**.

- To filter the list, enter a few characters of the recipient's name in the type-ahead field and then press **Enter**.

c. In the list, select one or more recipients and then press **Enter**.

d. To add the recipients to the email, click the **To** or **Cc** fields.

4. To enter recipients manually, enter the email addresses separated by semicolons in the **To** or **Cc** fields.
5. In the **Subject** field, enter the subject of the email.
6. In the **Comments** field, enter your comments.
7. Click **Apply**.

## About cross charge types for initiatives

The selected cross charge type affects the options that are available for revenue recognition and for request processing rules. Changing the cross charge type after saving the initiative can affect certain settings. For example, changing from **Mixed - Fixed Fee/Hourly** to **Hourly** deletes any fixed fees that have been saved.

The following cross charge types are available:

| Cross charge type | Description |
|---|---|
| **Daily** | Time and rate calculations are based on the number of days for the initiative (originally entered as hours and converted to daily fractions as set up in the cost structure. |
| **Hourly** | Time and rate calculations are based on the number of hours entered for the initiative. |
| **Fixed Fee** | Client will be cross charged a set amount for a deliverable or milestone. |
| **Mixed - Fixed Fee/Daily** | Combination of daily and fixed fee charge types. |
| **Mixed - Fixed Fee/Hourly** | Combination of hourly and fixed fee charge types. |

**Note:** When you specify a fixed-fee option, the **Fixed-fee schedule** tab is available in the **Initiative** dialog box and the **Force fixed-fee selection** check box is available in the **Cross charge information** tab.

### About applying daily conversion rates

Initiatives with the cross charge type **Mixed - Fixed Fee/Daily** or **Daily** use daily conversion rates from the cost structure to convert hours to days for cross charging. For these initiatives, the daily conversion rate from the cost structure is applied by default to time entries grouped by project, task, resource, and date.

However, you can set up an initiative so that time entries are grouped by project and date for each resource. To be grouped by project and date, the time entries must have the same cross charge rate.

## About cross charge formats for initiatives

The **Tax on sum - General** and the **Tax on sum - French general** formats are available only when the **Calculate tax on total amount of items** option is selected as the method of tax calculation in the initiative.

### Cross charge formats and Client Portal

If you use one of the standard Changepoint cross charge formats, then when the cross charge is approved, an HTML snapshot of the cross charge is automatically saved. This HTML snapshot is displayed when users view the cross charge in Client Portal. If you use a custom cross charge format, then cross charges are displayed in the **General cross charge** format only.

## About cross charge addresses for initiatives

For the cross charge address of the initiative, you can use the main, cross charging or shipping address of the client or client contact.

Because the different client and contact addresses can be set up with different work location groups and work locations, changing the cross charge address can change the work location groups and work locations for the initiative, which can affect taxation.

# About cross charge rates for initiatives

You can set up cross charge rates on an initiative based on any of the following:

- resources only

- staffing levels only
- sets of resources and staffing levels

However, as a best practice, it is recommended that you set up cross charge rates consistently throughout your organization to avoid any confusion.

Staffing level-based rates are applied to a resource based on the staffing level for the tasks that the resource is assigned during the initiative. Each staffing level also has a standard cross charge rate and each resource has a standard cross charge rate. Each resource can be assigned to more than one staffing level during an initiative

The cross charge rates from the initiative take precedence over the resource's standard cross charge rate except where a task is assigned to a resource with no staffing level specified, and cross charge rates have been set up on the initiative for staffing levels only. In this case, the cross charge rates from the resource profiles are used.

Only the staffing levels that have been set up with cross charge rates are available in task assignments.

> **Tip:** To show your clients the hours that resources have worked on their projects, but for which they are not being cross charged, enter a cross charge rate of zero. The zero rate displays as the cross charge rate in the **Cross charge rates** tab of the initiative and is used on cross charges instead of the standard rate.

## Copying or updating cross charge rates from the cost structure

When you copy or update cross charge rates from the cost structure, you are prompted for an effective date. The cross charge rates for the cost structure that are in effect for the effective date that you specify are copied to the initiative. When you copy the cross charge rates the first time, the effective dates in the history will be the effective dates from the cost structure. Each time you subsequently update the cross charge rates, the effective dates in the history will be the effective dates that you specify during the update.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Cross charge rates** tab.
3. Click the **Copy Standard Rates** button.

   The **Select Effective Date** dialog box appears.

4. Enter the effective date for the cross charge rates.
5. In the **Discount** field, specify the discount percent, if applicable, that applies to the cross charge rates.
6. In the **Comments** field, enter comments about the cross charge rates.
7. Click **OK**.

   The cross charge rates are added to the cross charge rate table.
8. Click **Save**.

## Setting up a cross charge rate for an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.
2. Click the **Cross charge rates** tab.
3. Right-click in the table and then select **Insert**.

   A row is added to the table.
4. To add a cross-charge rate from a different cost structure, select the cost structure in the **Cost structure** field.
5. Do one or both of the following:
   - In the **Staffing level** list, select the staffing level.
   - In the **Resource** list, select the resource.

   **Tip:** To add resources to the **Resource** list, and optionally to your preferred resources, right-click and then select **Manage Resources**.
6. Specify the cross charge rate by doing one of the following:
   - To specify the cross charge rate, enter the rate in the **Cross charge rate** field. The discount percent is calculated automatically.
   - To apply a discount to the standard rate, enter the discount percent in the **Discount (%)** field. The cross charge rate is calculated automatically.
   - To apply a markup to the standard rate, enter the negative percent in the **Discount (%)**. The cross charge rate is calculated automatically.

7. Complete the remaining fields as required. For more information, see "Create/Edit Initiative dialog, Cross charge rates tab options" on page 31.
8. Click **Save**.

## Create/Edit Initiative dialog, Cross charge rates tab options

| Option | Description |
|---|---|
| **Cost structure** type-ahead field | Cost structure for the initiative. |
| **Staffing level** type-ahead field | Staffing level for the cross charge rate. |
| **Resource** list | Resource for the cross charge rate. |
| **Standard rate** field | Cross charge rate before any discount or markup, as follows:<br>• if only a staffing level is specified in this dialog, then the staffing level rate is displayed<br>• if only a resource is specified, then the resource rate is displayed<br>• if both a staffing level and resource are specified, then the resource rate is displayed |
| **Discount (%)** field | Percentage to apply to the standard rate to determine the discounted cross charge rate.<br>To apply a discount of 20%, enter: 20.<br>To apply a markup of 20%, enter: -20. |
| **Cross charge rate** field | Standard rate * (100-discount percentage)/100.<br>If you enter a cross charge rate manually, then the discount percentage is automatically calculated based on the standard rate. |
| **Cross charge currency** list | Currency of the cross charge rate.<br>If this currency is different than the initiative currency, the cross charge rate is converted to the initiative currency when work is cross charged to the client. |

| Option | Description |
|---|---|
| **Staffing level cost rate** field | Cost rate for the resource or staffing level rate, depending on whether the initiative uses a resource-based or staffing level-based cost structure. |
| **Staffing level OT hourly cost rate** field | Overtime cost rate for the resource or staffing level rate, depending on whether the initiative uses a resource-based or staffing level-based cost structure. |
| **Cost currency** list | Currency of the cost rate. |
| **Request time only** check box | When selected, the staffing level is used only for cross charging time associated with requests. This staffing level is not available for selection when assigning tasks. |

## About burden rates used in cross charge rates

The burden rate for a resource comes from the resource's profile. If a burden rate is not specified on the resource profile, then the burden rate of the workgroup or global workgroup is used.

For staffing levels or for resources that do not have burden rates specified on their profile, workgroup or the global workgroup, the burden rate comes from the cost center that is specified for the initiative on the **Cross charge information** tab.

## Editing cross charge rates

You cannot edit cross charge rates. Instead, you must replace the cross charge rate with a new rate that has a different effective date. If you make a rate inactive, you must make sure that there is another rate that is currently active. For a given effective date, only one rate can be active at a time.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Cross charge rates** tab.

3. Click the row of the cross charge rate that you want to change.

   The **Cross Charge Rate History** table appears.

4. Right-click in the table and then select **Insert**.

A new row is added to the table. The new row includes the currently effective cross charge rate information, and shows the current date as the effective date.

5. Make the necessary changes to the new row. For more information, see "Create/Edit Initiative dialog, Cross charge rates tab options" on page 31.
6. In the **Effective Date** field, enter the date when the changes become effective.
7. To make the cross charge rate inactive, clear the **Active** check box.
8. In the **Comments** field, enter comments about the rate change.
9. Click **Save**.

### Deleting a cross charge rate

You cannot delete a cross charge rate that is used on a task.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.
2. Click the **Cross charge rates** tab.
3. Click the row of the cross charge rate that you want to delete.
4. Right-click in the table, and then select **Delete**.
5. Click **OK** to confirm.
6. Click **Save**.

## About setting up split charges

For an initiative, you can set up charge amounts to be split between two or more clients, provided that either no cross charge have been created, or all existing cross charges have been committed.

You can set up split charges at the following levels:

- On the initiative – split charge rules apply to all time, fixed fees, expenses, non-labor items, and request time for the initiative. These rules are overridden by rules set at a lower level.
- On specific non-labor items and fixed fees on the initiative – split charge rules apply to specific non-labor items or fixed fees defined in the initiative.

- On fixed-fee schedule items – split charge rules apply to fixed fee schedule items defined for a fixed fee schedule in the initiative.
- On projects for the initiative – split charge rules apply specifically to time and expenses entered for the project.

### About setting up split charge on an initiative

You first enable split charges on the initiative, which becomes the master initiative, and then specify the clients and the percentage to be cross charged to each client. When you save the settings, a phantom initiative for cross charging purposes only is created under each client.

After you set up split charges, all editing must be done in the master initiative. All time, fixed fees, expenses, non-labor items, and request time are applied to the master initiative and then cross charged, according to the split percentage or amount that was specified.

### About phantom initiatives

When the master initiative is saved, a phantom initiative is created for each client included in the split charges. Phantom initiatives have the same name as the master initiative and are for charging purposes only. You cannot edit phantom initiatives. You must make all changes to the master initiative.

Phantom initiatives are not available for selection in the following reports:

- Budget reports
- **Initiative Financial Analysis** report
- **Work in Progress** report
- **Revenue Reconciliation** report

## Setting up split charges on an initiative

You select clients and specify the percentage that each client will be cross charged. You can either specify the percentage manually as you select each client, or select all of the clients first and then select the option to automatically divide the percentage evenly between the clients.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Cross charge information** tab.

3. Select the **Split charges** check box, and then click **Apply**.

   The **Split charges** tab appears.

4. Click the **Split charges** tab.

5. Right-click in the table and then select **Insert**.

   An empty row is added to the table.

6. In the **Client** type-ahead field, select the client that will be added in the split charge.

7. In the **Percentage** field, enter the percentage that the client is to be charged.

8. In the **Main Contact** field, select the contact for the client.

9. Add additional clients as required.

10. Click **Save**.

### To divide the charges evenly between all the clients

When you divide the charges evenly between all clients, the same percentage is applied to all clients listed for the initiative, including the clients that were added to the list when split charge rules were set up at the non-labor item or fixed fee level.

1. Right-click in the table and select **Auto-split all**.

2. Click **Save**.

### To divide the charges evenly between selected clients

When you divide the charges between selected clients, the percentage is changed to 0 for all clients that are not selected.

1. Select the rows of the required clients.

   **Note:** Use the **Shift** and **Ctrl** keys according to the standard Windows conventions to select clients.

2. Right-click in the table and select **Auto-split selected**.

3. Click **Save**.

## Editing split charges for an initiative

Once cross charges have been created for an initiative, you cannot change the split charge settings until all cross charges for the master and phantom initiatives are in **Archived** or **Credited** status, or have been discarded or deleted.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Split charges** tab.
3. Make the necessary changes.
4. To delete one or more rows, select the rows, right-click and then select **Delete**.
5. Click **Save**.

## Setting up split charges for a non-labor item or a fixed fee

You can split the charges between two or more clients by percentage or by amount.

You can automatically add the clients that have already been defined at the initiative level, and you can specify new clients. Clients added at the non-labor item or fixed fee level are also added to the split charge list at the initiative level, but the split percentage displays 0.

1. Access the initiative for editing.
2. Click the **Non-labor items** or the **Fixed fees** tab.
3. Right-click the table and select **Insert**.
4. Complete the fields as required.
5. Select the **Show split charges** check box, and then click outside the cell in the row.

   The **Split charges** section appears.

6. Select the split charge option:
   - To split charges by percentage, select **Split by percentage**.
   - To split charges by amount, select **Split by value**.
7. To specify a client, right-click in the table and select **Insert**, and then select the client in the **Client** type-ahead field.

8. To add the clients that have already been defined at the initiative level, right-click in the table and select **Load initiative split charges**.
9. To specify the percentage or amount for each client, do one of the following:
   - To specify the percentage or amount manually, enter the value in the **Percentage** or **Amount** field.
   - To split the charges evenly between all clients, right-click in the table and select **Auto-split**.
10. Click **Apply**.

### Editing split charges for a non-labor item or a fixed fee

Once cross charges have been created for a non-labor item or a fixed fee, you cannot change the split charge settings until all cross charges are in **Archived** or **Credited** status, or have been discarded or deleted.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.
2. Click the **Non-labor items** or the **Fixed fees** tab.
3. In the non-labor item or the fixed fee row, select **Show split charges**.

   The **Split cross charge** table appears.
4. Make the necessary changes.
5. To delete one or more rows, select the rows, right-click and then select **Delete**.
6. Click **Save**.

## About scheduling fixed fees for the initiative

You can create a fixed-fee schedule only for initiatives that use a fixed fee or mixed cross charge type. A fixed-fee schedule is a series of fixed cross charges for an initiative. You create a fixed fee schedule with fixed-fee schedule items to schedule the cross charging for fixed-fee deliverables.

For example, a client agrees to a fixed fee initiative worth $15,000, which is to be cross charged $5,000 on the last day of each month for the next three months. You would first create

a fixed-fee schedule for the $15,000 deliverable, and then create three fixed-fee schedule items, each with the cross charge amount of $5,000.

You cannot create fixed fee schedule items for deliverables that have parent deliverables or committed recognized revenue, or that have been cross charged.

## Creating a fixed-fee schedule

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. Right-click in the table and then select **Insert**.

   A new row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Fixed-fee schedule tab options" on page 38.

5. Click **Save**.

6. Add the fixed-fee schedule items. For more information, see "Adding recurring fixed-fee schedule items" on page 41 and "Adding a fixed-fee schedule item manually" on page 45.

## Create/Edit Initiative dialog, Fixed-fee schedule tab options

The options listed here apply both to fixed-fee schedules and fixed-fee schedule items.

| Option | Description |
|---|---|
| **Cross charge date** field | Date that the fixed-fee deliverable is cross charged. |
| **Cross charge amount** field | Amount that will be cross charged. |
| **Deliverable** field | Name of the deliverable, which displays on the cross charge. |

| Option | Description |
|---|---|
| **Parent deliverable** field | Parent deliverable that is associated with the new deliverable, if applicable. If a parent deliverable is selected, schedule items cannot be created for this fixed deliverable. Parent fixed fee schedules or schedule items are not available for selection as a parent deliverable. |
| **Do not cross charge** check box | When selected, indicates that the fixed-fee schedule items will be cross charged instead of the fixed-fee deliverable. **Note:** If the **Do not cross charge** check box is selected for the fixed-fee deliverable, you can still recognize revenue against the fixed-fee deliverable and associate tasks and cost with the deliverable. |
| **Cross charge only when tasks are completed** check box | When selected, if the fixed fee is associated with a task, the fixed fee or the fixed-fee item can only be cross charged when all associated tasks have been marked as completed. |
| **Cross charge distribution GL account** check box | GL account to which cross charge amounts for fixed fees will be distributed. |
| **Cross charged** check box | When selected, indicates whether the deliverable has been cross charged. |
| **Fixed fee ID** field | Optional field if your organization is using a custom interface or custom reports. |
| **Work location** and **Work location group** fields | Work location and work location group, which determine how the item is taxed, and can also be used for reporting purposes. |
| **Work code category** field | Work code category |
| **Work code** field | Work code |
| **Prepaid** check box | Optional field if your organization is using a custom interface or custom reports. |
| **Capital** check box | When selected, designates the item as a capital cost |

| Option | Description |
|---|---|
| **Allow selection on tasks** check box | When selected, the fixed-fee deliverable can be selected on tasks. |
| **Show schedules** check box | When selected, the schedule items table is displayed. |
| **Revenue recognized** check box | When selected, indicates that revenue has been recognized for the fixed fee. |
| **Revenue adjustment** field | Total amount of adjustments made to the revenue that was recognized for the deliverable. |
| **Revenue recognition method** option | Revenue recognition method. |
| **Physical percent complete** field | Value for the physical percent complete, if the revenue recognition method is selected. |
| **GL credit account** list | GL credit account for the deliverable. |
| **GL debit account** list | GL debit account for the deliverable. |
| **Show split charge** check box | When selected,split charge rules can be set up for fixed-fee schedules.<br>**Note:** This check box displays only if split charge is enabled for the initiative. |

## Editing a fixed-fee schedule

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. Make the necessary changes. For more information, see "Create/Edit Initiative dialog, Fixed-fee schedule tab options" on page 38.

4. Click **Save**.

## Deleting a fixed-fee schedule

1. Access the initiative for editing.

The **Edit Initiative** dialog box appears.

2. Click the **Fixed-fee schedule** tab.
3. Select the row of the fixed fee schedule.
4. Right-click and select **Delete**.

   The fixed fee schedule is removed from the table.
5. Click **Save**.

## Adding recurring fixed-fee schedule items

You can add a set of fixed-fee schedule items that recur weekly or monthly. You can specify the number of schedule items and the amount to be cross charged per schedule item.

1. Do one of the following:
   - Create a fixed-fee schedule.
   - Access a fixed-fee schedule for editing.
2. Select the **Show schedules** check box of the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. Click **Auto-add schedule items**.

   The **Auto-Add Schedule Items** dialog box appears.
4. In the **Start cross charge date** field, enter the start date for the schedule items.
5. To set up the schedule items to be cross charged weekly or every *x* weeks:
   a. In the **Cross charge frequency** field, select **Weekly**.
   b. In the **Recurrence Setting** section, enter the value to specify the frequency in weeks.
6. To set up the schedule items to be cross charged monthly, or every *x* months, on the same day of the month as the Start cross charge date:
   a. In the **Cross charge frequency** field, select **Monthly**.
   b. In the **Recurrence Setting** section, select the **Every [ ] months** option
   c. Enter the value to specify the frequency in months.

7. To set up the schedule items to be cross charged monthly, or every *x* months, on the first or last day of each month:
   a. In the **Cross charge frequency** field, select **Monthly**.
   b. In the **Recurrence Setting** section, select the **Every [First] day of every [ ] months** option
   c. If required, change **First** to **Last**.
   d. Enter the value to specify the frequency in months.
8. In the **Number of schedule items** field, enter the total number of schedule items.

   The cross charge amount for each schedule item that appears in the **Amount per schedule item** field is calculated by dividing the cross charge amount by the number of schedule items.
9. Complete the remaining fields as required. For more information, see "Create/Edit Initiative dialog, Fixed-fee schedule tab options" on page 38.
10. If the **Split Charge** section displays, you can set up split cross charge rules for the fixed-fee schedule items. For more information, see "Setting up split charges for recurring fixed-fee schedule items" on page 44.
11. Click **Save**.

## Auto-Add Schedule Items dialog box options

| Option | Description |
|---|---|
| **Start cross charging date** field | Date when the first fixed-fee schedule item is cross charged. |
| **Cross charging frequency** option | Frequency of the schedule items (Monthly or Weekly). |
| **Recurrence Settings** section | Options for setting up the recurrence of the schedule items. Options depend on the frequency of the schedule items. |
| **Every [ ] weeks** option | Frequency of weekly schedule items, for example, every [2] weeks. |

| Option | Description |
|---|---|
| **Every [ ] months** option | Frequency of monthly schedule items, for example, every [3] months, starting from date in the Start date field. |
| **The [first or last] day of every [ ] months** field | Frequency of monthly schedule items, for example, the [first] day of every [3] months. |
| **Number of schedule items** field | Total number of schedule items that will be automatically created. |
| **Amount per schedule item** field | Amount per schedule item. |
| **Multiplier percentage** field | Percentage by which the fixed-fee amounts increase. The increase amounts are compounded.<br>For example: If you set up 12 monthly fixed-fee items with a multiplier of 10% and the first schedule item is US$1,000, the second schedule item will be US$1,100, the third schedule item will be US$1,210, the fourth schedule item will be US$1,331, and so on. |
| **Allow selection on tasks** check box | When selected, the fixed-fee deliverable can be selected on tasks. |
| **Do not cross charge** check box | When selected, cross charging will be done for the fixed-fee deliverable instead of the fixed-fee schedule item. |
| **Cross charge only when tasks are completed** check box | When selected, the fixed-fee schedule item can only be cross charged when its associated task (if any) has been marked as completed. |
| **Cross charge distribution GL account** field | GL accounts to which cross charge amounts for fixed fees will be distributed. |
| **Prepaid** check box | When selected,the fixed fee item has been prepaid. |
| **Capital** field | When selected, designates the item as a capital cost. |

| Option | Description |
|---|---|
| **Work location group** field<br>**Work location** field | Work location group and work location, which determine how the item is taxed, and can also be used for reporting purposes. |
| **Work code category** field | Work code category. |
| **Work code** field | Work code. |

## Setting up split charges for recurring fixed-fee schedule items

1. Access a fixed-fee schedule.
2. Select the **Show schedules** check box of the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. Click **Auto-add schedule items**.

   The **Auto-Add Schedule Items** dialog box appears.
4. Add fixed-fee schedule items. For more information, see "Adding recurring fixed-fee schedule items" on page 41.
5. Select the **Show split charges** check box of a fixed-fee schedule item, and then click outside the cell.

   The **Split Charges** section appears.
6. Select the split charge option:
   - To split charges by percentage, select **Split by percentage**.
   - To split charges by amount, select **Split by amount**.
7. To add a client, right-click in the table and select **Insert**, and then select the client in the **Client** type-ahead field.
8. To add split charge clients from the initiative, right-click in the table and select **Load initiative split charges**.
9. To specify the percentage or amount for each client, do one of the following:

- To specify the percentage or amount manually, enter the value in the **Percentage** or **Amount** field.
- To split the charges evenly between all clients, right-click in the table and select **Auto-split**.

10. Click **Save**.

## Editing split charges for recurring fixed-fee schedule items

Once cross charges have been created for an initiative, you cannot change the split charge settings until all cross charges for the master and phantom initiatives are in **Archived** or **Credited** status, or have been discarded or deleted.

1. Access the fixed-fee schedule.
2. Click the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. In the row of the fixed-fee schedule item, select the **Show split charges** check box, and then click outside the cell.

   The **Split cross charge** section appears.
4. Make the necessary changes.
5. To delete one or more rows, select the rows, right-click and then select **Delete**.
6. Click **Save**.

## Adding a fixed-fee schedule item manually

1. Do one of the following:
   - Create a fixed-fee schedule.
   - Access a fixed-fee schedule for editing.
2. Select the **Show schedules** check box of the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
3. Right-click in table and then select **Insert**.

   A new row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Fixed-fee schedule tab options" on page 38.
5. Click **Save**.

## Editing a fixed-fee schedule item

If the parent deliverable has been cross charged, you cannot change the cross charge amount of the schedule items. If revenue has been recognized for the parent deliverable, changes to the cross charge amount must not affect the total amount and must balance with the milestones.

If a revenue recognition method has been selected for the parent fixed fee deliverable, the revenue recognition fields do not display in the schedule item table.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.
2. Click the **Fixed-fee schedule** tab.
3. Click the fixed-fee schedule row.

   The fixed-fee schedule items table appears.
4. Make the necessary changes. For more information, see "Adding a fixed-fee schedule item manually" on page 45.
5. Click **Save**.

## Deleting a fixed-fee schedule item

You cannot delete a fixed-fee schedule item if one or more of the following conditions apply:

- revenue has been recognized for the item
- the item is associated with a task
- the item is associated with a request processing rule
- the item has been cross charged

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.
2. Click the **Fixed-fee schedule** tab.

3. Click the fixed-fee schedule row.

   The fixed-fee schedule items table appears.

4. Select the fixed-fee schedule item that you want to delete.

5. Right-click and select **Delete**.

   The fixed-fee schedule item is removed from the table.

6. Click **Save**.

## Adding a non-labor item to an initiative

You can set up non-labor items such as hardware, applications or systems that are required for the initiative, including the cross charge information and revenue recognition information for these items.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Non-labor items** tab.

3. Right-click in the table and select **Insert**.

   An empty row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Non-labor items tab options" on page 47.

5. If the revenue recognition fields are available, you can set up revenue recognition for the non-labor item. For more information, see "Setting up revenue recognition for a non-labor item" on page 54.

6. Click **Save**.

### Create/Edit Initiative dialog, Non-labor items tab options

| Field | Description |
|---|---|
| **Non-labor item** field | Non-labor item |
| **Description** field | Description of the non-labor item |

| Field | Description |
|---|---|
| **Cross charge date** field | Date the non-labor item will be cross charged. |
| **Parent non-labor item** field | Parent non-labor item, if applicable |
| **Do not cross charge** check box | When selected, the non-labor item is not cross charged. |
| **cross charge distribution GL account** check box | GL account to which the cross charge amounts for non-labor items will be distributed. |
| **Cross charged** check box | Automatically selected if the non-labor item has already been cross charged. |
| **Allow selection on task** check box | When selected, the non-labor item is available to be associated with a task and cross charged based on the status of the task. |
| **Available for cross charging** list | Specifies when a non-labor item that is associated with a task can be cross charged. Options are:<br>• **On completion of task** – the non-labor item becomes available for cross charging when all tasks that are associated with the non-labor item are completed.<br>• **On ready to cross charge on task** – the product is available for cross charging when the **Initiative on-labor item ready to cross-charge** check box is selected on the task. |
| **Capital** check box | When selected, designates the item as a capital cost. |
| **Quantity** field | Units of the non-labor item to be delivered to the client. |
| **Standard charge** field | Standard cross charge amount per unit of the non-labor item. |
| **Negotiated charge** field | Cross charge amount that has been negotiated for the initiative. |
| **Total charge** field | Total cross charge amount for the initiative. |

| Field | Description |
|---|---|
| **Standard cost** field | Standard cost of the non-labor item. |
| **Negotiated cost** field | Cost that has been negotiated for this initiative |
| **Standard cost currency** field | If the currency for the non-labor item currency is different from the currency specified in the initiative, the currency of the initiative is used for cross charging. |
| **Total cost** field | Total cost. |
| **Work location group** list<br>**Work location** list | Location where the non-labor item is being shipped. The location determines how the item is taxed, and is used for reporting purposes. |
| **Project** field | Project associated with the non-labor item. |
| **Resource** field | Resource for which the non-labor item costs that do not go through the expense reporting process can be tracked through custom reports. |
| **Revenue recognition options** | |
| **Revenue recognized** check box | Automatically selected if revenue has already been recognized and committed for the non-labor item. |
| **Revenue recognition method** field | Revenue recognition method to apply to the non-labor item. Options are:<br>• **Amount recognized**<br>• **Percent of total deliverable**<br>• **Physical percent complete** |
| **Physical percent complete** field | Percentage that the non-labor item is complete. Available only if **Physical percent complete** is selected as the revenue recognition method. If you do not want to specify a value, enter zero (0). You can update this percentage in the pre-run report during the revenue recognition process. |
| **GL credit account** list | GL credit account for the non-labor item. |

| Field | Description |
|---|---|
| **GL debit account** list | GL debit account for the non-labor item. |
| **Revenue adjustment** field | Total amount of adjustments made to the revenue recognized for the non-labor item. |

### Editing a non-labor item associated with an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Non-labor items** tab.

3. To edit a value, click the cell and then select a new value. For more information, see "Create/Edit Initiative dialog, Non-labor items tab options" on page 47.

4. Click **Save**.

### Deleting a non-labor item associated with an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Non-labor items** tab.

3. Right-click the non-labor item and then click **Delete**.

4. Click **Save**.

## Setting up revenue recognition in an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Revenue** tab.

3. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Revenue tab options" on page 51.

4. Click **Save**.

## Create/Edit Initiative dialog, Revenue tab options

| Field | Description |
|---|---|
| **Enable revenue recognition** check box | When selected, revenue recognition is enabled. |
| **Transactions after this date** field | Date after which revenue will be recognized for the initiative. Use this option to allow resources to enter time without it being considered as potential revenue. For example, your organization may have spent more time preparing a prototype than the amount of time that can be cross charged to the client. |
| **Maximum recognizable revenue** field | Maximum revenue that can be recognized. Default value is the approved amount specified for the initiative. |
| **Maximum recognizable revenue for time and expenses** field | Approved amount, less the fixed fee and non-labor item amounts.<br>If time and expense maximums are enabled, revenue recognition for time and expenses stops once it reaches the maximum amount. If the field displays zero, the fixed fee and non-labor item amounts exceed the approved amount, and no revenue will be recognized for time and expenses. |
| **Labor multiplier** field | Percent value to enable revenue recognition for time based on the cost rate rather than the charge rate. The amount is calculated as follows:<br>Resource or staffing level cost rate * Labor multiplier * Revenue recognition adjustment factor |
| **Revenue recognition adjustment factor** field | Percent value to reduce the recognized revenue amount to a more conservative amount. The adjustment factor applies to time, expenses, fixed-fee deliverables, non-labor items, and milestones. |
| **Cost center type** list | Depending on the option selected, during the revenue transfer process, the cost center of the initiative manager or cost structure is compared to the cost center of the resource who entered the time. |

| Field | Description |
|---|---|
| **Revenue Recognition Option section** | |
| **Deliverable or milestone-based** check box | When selected, revenue recognition is based on deliverables/milestones. |
| **Time and expense-based options** | When selected, revenue recognition is based on the selected option (both time and expenses, time only, or expenses only, or disabled). |
| **Revenue Accounts section** | |
| **Revenue credit account for time** list | Credit account for revenue realized on chargeable time. This field is available only if you select a revenue recognition method for time. |
| **Revenue debit account for time** list | Debit account for revenue realized on chargeable time. This field is available only if you select a revenue recognition method for time. |
| **Lock desubmit time** check box | When selected, time for the initiative cannot be desubmitted. Automatically selected when the tentative revenue recognition is in progress and automatically cleared once the recognized revenue has been committed. |
| **Lock time and expense transfer** check box | When selected, time and expenses for the initiative cannot be transferred. Automatically selected when the tentative revenue recognition is in progress and automatically cleared once the recognized revenue has been committed. |

## Setting up revenue recognition for a fixed-fee deliverable

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Fixed-fee schedule** tab.

3. In the **Revenue recognition method** field, select the revenue recognition method to apply to the deliverable.

- If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones.
- If you select **Physical percent complete** or **Physical percent complete - Cost**, do one of the following:
  - Enter a percent value in the **Physical percent complete** field.
  - Enter zero if you do not want to specify a value yet. This percentage can be updated in the pre-run report during the revenue recognition process.

4. In the **GL credit account** and **GL debit account** lists, select the GL accounts for the deliverable.
5. Click **Save**.

## Setting up revenue recognition for a fixed-fee schedule item

You can break down the cross charge amount of a deliverable included in a fixed-fee schedule into smaller amounts, according to a schedule that is specific to the deliverable. You can then set up revenue recognition for these schedule items rather than for the deliverable.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.
2. Click the **Fixed-fee schedule** tab.
3. Click the row of a fixed-fee deliverable for which schedule items have been set up.

   The fixed-fee schedule items table appears.
4. In the **Revenue recognition** method field for the schedule item, select the revenue recognition method:
   - If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones.
   - If you select **Physical percent complete**, you must enter a percent value in the **Physical percent complete** field.
5. Complete the remaining fields as required. For more information, see "Create/Edit Initiative dialog, Fixed-fee schedule tab options" on page 38
6. Click **Save**.

## Setting up revenue recognition for a non-labor item

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Non-labor items** tab.

3. In the **Revenue recognition** method field, select the revenue recognition method:

   - If you select **Amount recognized** or **Percent of total deliverable**, you must set up milestones.
   - If you select **Physical percent complete**, you must enter a percent value in the **Physical percent complete** field.

4. Complete the remaining fields as required. For more information, see "Create/Edit Initiative dialog, Non-labor items tab options" on page 47

5. Click **Save**.

## Adding a milestone manually for a non-labor item or fixed-fee schedule

If you select **Amount recognized** or **Percent of total deliverable** in the **Revenue recognition** method field, you must set up milestones.

1. Access the initiative for editing.

2. Click the **Non-labor items** tab or **Fixed-fee schedule** tab.

3. Click the non-labor item row or at the fixed-fee schedule row.

   The milestones table appears.

4. Right-click in the milestones table and select **Insert**.

   A new row is added to the table.

5. In the **Milestone** field, type the name of the milestone.

6. Complete the fields as required. For more information, see "Milestone options for non-labor items and fixed-fee schedules" on page 54.

7. Click **Save**.

## Milestone options for non-labor items and fixed-fee schedules

The fields that appear depend on the revenue recognition method you choose.

| Field | Description |
|---|---|
| **Milestone** field | Name of the milestone. |
| **Amount** field | Portion of the total cross charge amount of the fixed-fee deliverable or the total charge amount of the non-labor item. |
| **Percent** field | Percentage of the total cross charge amount of the fixed-fee deliverable, or the total charge amount of the non-labor item, calculated as follows:<br>Total cross charge amount / Number of milestones |
| **Date** field | Date when the revenue recognition for the milestone can start. |
| **GL credit account** list | Credit account for the selected milestone. |
| **GL debit account** list | Debit account for the selected milestone. |
| **Revenue recognized** check box | Indicates if revenue has already been recognized and committed for the deliverable or the non-labor item. |
| **Revenue adjustment** field | Total amount of adjustments made to the revenue recognized for the deliverable or the non-labor item. |

## Adding milestones automatically for a non-labor item or fixed-fee schedule

If you select **Amount recognized** or **Percent of total deliverable** in the **Revenue recognition** method field, you must set up milestones.

1. Access the initiative for editing.
2. Click the **Non-labor items** tab or **Fixed-fee schedule** tab.
3. Click the non-labor item row or at the fixed-fee schedule row.

   The milestones table appears.
4. If the milestones table is empty, click **Auto-add milestones**.

   The **Auto-Add Milestones** dialog box appears.
5. In the **Start date** field, enter the start date of the revenue recognition.
6. In the **Number of milestones**, enter the number of milestones to be created.

7. In the **Frequency** field, select **Weekly** or **Monthly**.
8. In the **GL credit account** field, select a credit account.
9. In the **GL debit account** field, select a debit account.
10. Click **Save**.

## Editing a milestone for a non-labor item or fixed-fee schedule

When editing the charge percentage of each milestone, you must ensure that the total of all percentages equals 100.

1. Access the initiative for editing.
2. Click the **Non-labor items** tab or **Fixed-fee schedule** tab.
3. Click the non-labor item row or at the fixed-fee schedule row.

   The milestones table appears.
4. Make the necessary changes.
5. Click **OK**.

# 3. Initiative Approvals, Access and Other Details

## About specifying approvals for initiatives

### Time and expense approvals

You can specify time and expense approvers for initiatives, which override the default time and expense approvers set up for each resource.

Time and expense approvers review, and either approve or reject, time and expenses that are submitted by resources for the initiative. Secondary approvers approve the time and expenses of primary approvers. After time and expenses are approved, they become available for cross charging.

If a time approver is not specified on the initiative, time is approved at the project or resource level. In this case, you must set up the initiative to allow project managers to specify time approvers for their projects that are under the initiative.

You can also specify which expense general ledger (GL) accounts are available to be used for expenses associated with this initiative.

### Cross charge approvals

You can specify that two levels of approvals are required for cross charges. You can also specify whether the approvals are required based on cross charges being over a certain amount or containing write-offs/ups.

## Specifying time and expense approvers for an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Approvals** tab.

3. Complete the fields as required. For more information, see " Create/Edit Initiative dialog, Approvals tab options" on page 58.

4. To enable two levels of approvals for cross charges:

   a. In the **Cross charge Approvals** section, select one of the following check boxes:

      - **Enable two-level approval**
      - **Enable two-level approval if approved amount is exceeded**
      - **Enable two-level approval for write-offs/ups**

b. In the **Second-level approver** list, select the resource responsible for the second approvals.

5. Click **Save**.

## Create/Edit Initiative dialog, Approvals tab options

| Field | Description |
|---|---|
| **Primary time approver** type-ahead field | Resource who approves the time submitted for the initiative. |
| **Secondary time approver** type-ahead field | Resource who approves the time that the primary time approver submits. |
| **Primary expense approver** type-ahead field | Resource who approves the expenses for the initiative. |
| **Secondary expense approver** type-ahead field | Resource who approves the expenses entered by the primary expense approver. |
| **Allow project managers to specify the time approver** check box | When selected, project managers can specify the time approver for their projects under the initiative. |
| **Expense approval limit** field | When an amount is specified, expenses that are over the amount are sent to the initiative expense approver. |
| **Expense GL account** list | Resource whose workgroup GL account is to be used for the expenses associated with the initiative. |
| **Enable two-level approval** check box | When selected, a second level of approval after the initiative manager is required for all cross charges for the initiative. |
| **Enable two-level approval if approved amount is exceeded** check box | When selected, the second-level approval is required only for cross charges that exceed the approved amount that is specified in the **Reference** tab. |
| **Enable two-level approval for write-offs/ups** check box | When selected, the second-level approval is required only for cross charges that contain write-offs/ups. |
| **Second-level approver** type-ahead field | Resource who approves cross charges after the initiative manager approves them. |

## Managing access to an initiative

You can restrict view access to an initiative to specific resources. You can also do one of the following:

- You can restrict edit access to specific resources only. The resources must already have edit access to initiatives.
- You can grant edit access to specific resources that have access to create initiatives. The resources who have edit access can still edit the initiative.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Access** tab.

   **Note:** Only the resources who have view, edit or create access for initiatives are available for selection in the **Select Preferred Resources** dialog box.

3. To restrict view access to specific resources:

   a. Select the **Restrict view access to the following resources** check box.

   b. In the **Preferred resources** list, select one or more resources.

   c. Click the up arrow that is above the **Preferred resources** list.

4. To select other resources and optionally add them to your preferred resources list, click the **Manage resources** link.

5. To grant edit access to resources who already have create access to initiatives:

   a. Select the **Grant edit access to the following resources that can create initiatives** option.

   b. In the **Preferred resources** list, select one or more resources.

   c. Click the down arrow that is below the **Preferred resources** list.

6. To restrict edit access to specific resources who have edit access:

   a. Select the **Restrict edit access to the following resources that can edit initiatives** option.

   b. Click the down arrow that is below the **Preferred resources** list.

7. Click **Save**.

# About request processing rules

You must set up a request processing rule for a request type before resources can create requests of that request type for the initiative. The request processing rule is also where you can set up the request type so that an SLA can be created for it. You can apply the request SLA to cross charging and escalations for the request type, or to escalations only.

Different request types can require different processing rules. For example, operations desk requests, are often non-chargeable, while change requests are chargeable.

However, it is not necessary to set up processing rules for each request type. You can set up a generic processing rule to be used for most request types, and then set up processing rules for one or more specific request types as exceptions to the generic rule.

## Setting up a request processing rule

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click **Request processing rules** tab.

3. Right-click in the table and select **Insert**.

   An empty row is added to the table.

4. In the **Request type** list, do one of the following:

   - To set up a generic processing rule, leave the field blank.
   - To set up a processing rule for a specific request type, select the request type.

5. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Request processing rules tab options" on page 61.

6. Click **Save**.

## Create/Edit Initiative dialog, Request processing rules tab options

| Field | Description |
|---|---|
| **Request type** list | Request type that the processing rule applies to. Use the blank value to specify all request types. |
| **Request cross charge type** list | Type that indicates how the request time is processed:<br>• **Chargeable** – Request time is chargeable.<br>• **Unchargeable** – Request time is non-chargeable.<br>• **SLA-based** – Applies the request SLA to cross charging. Request time that is within the SLA is non-chargeable, and request time that is outside of the SLA is chargeable.<br>• **Effort and application** – If the application has a fixed unit cost and the request processing rule is **Effort and application**, the application is chargeable but time is not chargeable. If the application does not have a fixed unit cost and the request processing rule is **Effort and application**, then both the time and application are chargeable.<br>• **Fixed Fee** – Indicates that the request time is cross charged within a fixed fee. The **Fixed Fee** option is available only when the initiative has a fixed fee cross charge type. |
| **Staffing level** list | Staffing level. |
| **Track SLA** check box | When selected, the request type can be set up with an SLA for escalation and reporting purposes. If the request cross charge type is not SLA-based, then the request SLA applies to request escalation only. |
| **Fixed fee** field | Fixed-fee deliverable for which the request processing rules apply. Available only when the **Fixed Fee** request cross charge type is selected. |
| **View in Client Portal** check box | When selected, Client Portal users can create requests of the selected request type for the initiative. |

| Field | Description |
|---|---|
| **SLA required in Client Portal** check box | When selected, Client Portal users must have a valid SLA to create requests of the selected request type. |
| **Available to Changepoint users** check box | When selected, resources can create requests of the selected type for the initiative. |
| **SLA required in Changepoint** check box | When selected, there must be a valid SLA for the initiative before resources can create requests of the selected request type. |

## About editing request processing rules

You can edit a request processing rule provided that time for requests for the request type has not been cross charged. However, if time for the requests has been cross charged, then the following rules apply:

- If the initiative does not use split charging, then you cannot edit the request processing rule until the cross charges have been committed.
- If the initiative uses split charging, then you cannot edit the request processing rule until all cross charges for the request type have been processed and archived.

## Editing a request processing rule

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Request processing rules** tab.
3. Make the necessary changes. For more information, see "Setting up a request processing rule" on page 60.
4. Click **Save**.

## About deleting request processing rules

You can delete a request processing rule if it is available for editing. For more information, see "About editing request processing rules" on page 62.

However, if the request processing rule is a *default* rule that has been set up to apply to all request types, you must first create a new rule for request type that has cross charges in process. The new rule must use the same cross charge type. For example, if a cross charge is in process for a change request type that is cross chargeable, you must create a new cross chargeable rule for change requests before you can delete the rule for all request types.

### Deleting a request processing rule

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Request processing rules** tab.

3. Right-click the request processing rule and then click **Delete**.

4. Click **Save**.

## Specifying a request SLA for an initiative

You can set up an SLA for a request type provided that there is a request processing rule for the same request type that has the track SLA option selected.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Request SLA** tab.

3. Right-click in the table and then select **Insert**.

   An empty row is added to the table.

4. Complete the fields as required. For more information, see "Create/Edit Initiative dialog, Request SLA tab options" on page 64.

5. To specify 24-hour support, select the **24x7** check box.

6. To specify specific support hours:

   a. Clear the **24x7** check box.

   b. In the **Time zone** field, select the time zone.

   c. In the **Start day** and **Start time** fields, enter the start day and time.

   d. In the **End day** and **End Time** fields, enter the end day and time.

7. Click **Save**.

## Create/Edit Initiative dialog, Request SLA tab options

| Field | Description |
|---|---|
| **Request type** list | Request type for which the SLA is being set up. |
| **Application** type-ahead field | Application or non-labor item. |
| **Effective date** field | Date when the SLA begins. |
| **Expiry date** field | Date when the SLA ends. |
| **Priority** list | Priority level for the request. |
| **Response (hours)** field | Number of hours within which the operations center must send a response for the request. |
| **Resolution (hours)** field | Number of hours within which the operations center must resolve the request. |
| **Escalation (hours)** field | Number of hours before the end of the response time (if there is no response) and again before the end of the resolution time (if there is no resolution) at which the request will be escalated. For more information, see "About request SLA escalation" on page 65. |
| **On-site** check box | When selected, indicates that on-site support is provided. |
| **License** field | License number for the application. |
| **24x7 support** check box | When selected, the SLA includes 24-hour support. |
| **Time zone** field | Time zone for the support. |
| **Start day** field | Day of the week that support begins. |
| **Start time** field | Time that support begins each day. |
| **End day** field | Day of the week that support ends. |
| **End time** field | Time that support ends each day. |

## About request SLA escalation

You can set up requests to be escalated both when the remaining time for the response to the request and the remaining time for the resolution of the request falls below a specified value. For example, you set the following values:

- Response hours = 8
- Resolution hours = 24
- Escalation hours = 3

If there is no response to the request after five hours (8 – 3) the request is escalated. If the request is still open after 21 hours (24 – 3) then the request is escalated again. Escalated requests are assigned to the operations center manager, and a history entry is recorded.

## Editing a request SLA for an initiative

You can edit a request SLA only if all cross charged time for the request has been committed.

In all cases, if there is a specific request SLA for an application that cannot be edited, then all generic request SLAs for the same application that do not specify a request type or priority cannot be edited either.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Request SLA** tab.
3. To edit a value, click the cell and then enter or select a new value.
4. Click **Save**.

## Deleting a request SLA for an initiative

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Request SLA** tab.
3. Right-click the request SLA and then click **Delete**.
4. Click **Save**.

## Specifying default work locations and work codes for an initiative

You can specify additional work locations and work codes that will be available when resources create projects, tasks or expenses for the initiative. You can also specify the default work location and work code for the initiative.

1. Access the initiative for editing.

   The **Edit Initiative** dialog box appears.

2. Click the **Work locations/work codes** tab.

   The default work location is set on the **Cross charge information** tab.

3. In the **Select work locations** list, expand the tree view and select the work locations.

4. To change the default work location:

   a. Right-click a work location.

   b. Select **Set as default**.

5. To allow resources to select a different work location when they are entering time for a request, select the **Allow work location override for request time** check box.

6. In the **Select work codes** list, expand the tree view and select the work codes.

7. To change the default work code:

   a. Right-click a work code.

   b. Select **Set as default**.

8. To allow resources to select a different work code when they are entering time for a request, select the **Allow work code override for request time** check box.

9. Click **Save**.

   **Tip:** To select (or clear) all check boxes, right-click in the **Select work locations** list or the **Select work codes** list and select **Select all** (or **Clear all**).

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