Customer Relationship Management

User Guide

Changepoint PSA 2017

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Contents

1. Campaigns **9**

About campaigns 9
Accessing a campaign category 9
Creating a campaign category 9
Editing a campaign category 9
Accessing a campaign 10
Creating a campaign 10
Create/Edit Campaign dialog box, General tab options 10
Editing a campaign 11
Adding campaign costs 11
Create/Edit Campaign dialog box, Costs tab options 12
Editing a campaign cost 12
Adding a cost item to a campaign 13
Editing a cost item for a campaign 13
Accessing the campaign calendar 14

2. Managing competitor information **15**

About competitors 15
Accessing a competitor category 15
Creating a competitor category 15
Editing a competitor category 15
Accessing a competitor 16
Creating a competitor 16
Editing a competitor 16
Measuring the performance of a competitor 17

3. Prospects and Leads **19**

About prospects and leads 19
Accessing a prospect 19
Creating a prospect 19
Assigning an unprocessed prospect 20
Changing a prospect into a lead 20
Reassigning a prospect 21
Accessing a lead 21
Creating a lead 21
Assigning or reassigning a lead to a sales representative 22

4. Managing Opportunities **23**

About opportunities 23
Accessing an opportunity 23
Creating an opportunity 23
Create/Edit Opportunity dialog, General tab options 24
Adding a comment to the opportunity history 25
Restricting access to an opportunity 25
Specifying the competitors for an opportunity 26
Specifying the resources for a sales team 26
About forecasting revenue for opportunities 27
About displaying fiscal periods in the forecast tabs 27
About burden rates on services forecasts 27
Forecasting revenue for an opportunity 28
Create/Edit Opportunity dialog, Forecast tab options 29
Entering fixed fee forecast information 29
Create/Edit Opportunity dialog, Fixed fees tab options 30
Entering product forecast information 30
Create/Edit Opportunity dialog, Products tab options 31
Entering service forecast information 32
Create/Edit Opportunity dialog, Services tab options 33
Entering expense forecast information 35
Create/Edit Opportunity dialog, Expenses tab options 36
Editing an opportunity 37
About changing the close date on opportunities 37
Editing a forecast item 38
Associating a forecast item with a funding source 38
Copying a forecast item 39
Changing the fiscal periods that are displayed for an opportunity 39
Deleting an opportunity 39
Entering the outcome of an opportunity 40
Create/Edit Opportunity dialog, Outcome tab options 40

5. Creating New Entities from Opportunities **43**

About copying opportunity information to create new entities 43
Copying the opportunity forecast information to a new opportunity 43
About creating engagements from opportunities 44
Creating an engagement from an opportunity 44
About creating projects from opportunities 45
Creating a project from an opportunity 45
Create Project from Opportunity dialog box options 46

About creating tasks from the service forecast of an opportunity 48
Copying tasks when creating a project from an opportunity 49

6. Products and Services 51

About products and services 51
Accessing a product category 51
Creating a product category 51
Create/Edit Product Category dialog box options 52
Editing a product category 52
Deleting a product category 52
Accessing a product 53
Creating a product 53
Create/Edit Product dialog, General tab options 53
Adding or removing a resource in the product team 54
Specifying the price for a product 55
Editing a product 56
Deleting a product 56

7. Sales Opportunity Analysis 57

About analyzing opportunities 57
Analyzing opportunities 57
Creating an opportunity scenario 58
Scenario view options 58
Accessing an opportunity scenario 58
Editing an opportunity scenario 59
Adding and removing opportunities from a scenario 59
Creating an opportunity scenario from an existing scenario 60
Deleting an opportunity scenario 60
Editing an opportunity from a scenario 60
About viewing opportunities in a Gantt chart 61
Viewing opportunities from a scenario in a Gantt chart 61
About sales reports 62

8. Scenario Comparisons Worksheet 63

About the scenario comparisons worksheet 63
About editing fields in the scenario comparisons worksheet 63
Creating a scenario comparison 64
Scenario comparison worksheet basics 64
Accessing the scenario comparisons worksheet 65
Accessing a scenario comparison 65

About row totals in the scenario comparisons worksheet 66
About sorting columns in the scenario comparisons worksheet 66
About sorting rows in the scenario comparisons worksheet 66
About adjusting column width in the scenario comparisons worksheet 67
Selecting multiple rows in the scenario comparisons worksheet 67
Locking a row in the scenario comparisons worksheet 67
Unlocking a row in the scenario comparisons worksheet 68
About editing columns in the scenario comparisons worksheet 68
About data errors in the scenario comparisons worksheet 68
About required fields in the scenario comparisons worksheet 69
About viewing lists in the scenario comparisons worksheet 69
Selecting multiple values in a list in the scenario comparisons worksheet 70
Editing multiple values in a list in the scenario comparisons worksheet 71
Clearing values selected from a list in the scenario comparisons worksheet 71
Using the date field in the scenario comparisons worksheet 72
Using the calendar icon in the scenario comparisons worksheet 72
Showing and hiding what-if analysis data in the scenario comparisons worksheet 73
Copying a value to multiple cells in the scenario comparisons worksheet 73
Saving the scenario comparisons worksheet 74
About printing the scenario comparisons worksheet 74
Exporting a scenario comparison to Microsoft Excel 75
About selecting the data for a scenario comparison 75
About differences between entity fields and worksheet columns 76
Creating a scenario comparisons view 76
Manage Views dialog box (SCW) options 77
Specifying scenario amounts for a scenario comparisons view 79
About specifying columns for a scenario comparisons view 80
About scenario comparisons views with funding source data 81
Specifying columns in a scenario comparisons view 83
Specifying numeric formats for columns in a scenario comparisons view 84
Editing a scenario comparisons view 84
Deleting a scenario comparisons view 85
About selecting items for a scenario comparison 85
Creating a scenario comparisons filter 87
Manage Filters dialog box (SCW) options 88
Adding entities to a scenario comparisons filter 89
About adding other scenarios to a scenario comparisons filter 89
Adding other scenarios to a scenario comparisons filter 90
Adding project portfolios to a scenario comparisons filter 91
Editing a scenario comparisons filter 91

Deleting a scenario comparisons filter 92
About comparison scenarios 92
Creating a comparison scenario 93
Editing a comparison scenario 93
Renaming a comparison scenario 93
Deleting a comparison scenario 94
About what-if analysis of comparison scenarios 94
About using the RMW from a comparison scenario 95
Using the RMW from a comparison scenario 96
About using resource demand scenarios from a comparison scenario 97
Using resource demand scenarios from a comparison scenario 98
Troubleshooting the scenario comparisons worksheet 99

Index 105

1. Campaigns

About campaigns

You create campaigns to record information such as contacts, costs, and start and end dates for marketing campaigns. You organize campaigns under campaign categories, and view them in the campaign calendar.

Accessing a campaign category

1. Click **Marketing** > **Campaigns**.

   The **Campaign** tree view appears, displaying the campaign grouped by campaign categories.

2. Click the campaign category.

   The campaign category profile appears.

Creating a campaign category

1. Click **New** > **Campaign category**.

   The **Create Category** dialog box appears.

2. In the **Campaign** field, enter a name for the campaign category.
3. In the **Description** field, enter a description for the campaign category.
4. Click **Save**.

   The campaign category is created.

Editing a campaign category

1. Access the campaign category.
2. Click **Actions** > **Edit**.

   The **Edit Campaign Category** dialog box appears.

3. Make the necessary changes.
4. To delete the category:

   a. Click **Delete**.

   b. Click **OK** to confirm.

5. Click **Save**.

Accessing a campaign

1. Click **Marketing** > **Campaigns**.

   The **Campaigns** tree view appears.

2. Expand the tree view to locate the campaign.

3. Click the campaign.

   The campaign profile appears.

4. To display the campaigncosts, click the **Campaign information** tab.

   The campaign costs are displayed.

Creating a campaign

1. Click **New** > **Campaign**.

   The **Create Campaign** dialog box appears.

2. In the **General** tab, complete the fields as required. For more information, see .

3. Click **Save**.

4. You can enter costs for the campaign. For more information, see "Adding campaign costs" on page 11.

Create/Edit Campaign dialog box, General tab options

Option	Description
Category list	Category for the campaign.
Campaign field	Name of the campaign.
URL field	Website address for the campaign.
Description field	Description of the campaign.
Start date field	Start date of the campaign.

Option	Description
End date field	Start date of the campaign.
Include in campaign calendar check box	When selected, the campaign is included in the campaign calendar.
Projected revenue field	Total amount of revenue that you expect the campaign to generate.
Currency list	Currency for the expected revenue.
Marketing contact type-ahead field	Marketing resource responsible for the campaign.
Organizer type-ahead field	Company related to the campaign.
Main contact list	Main contact for the company related to the campaign
Secondary contact list	Secondary contact for the company related to the campaign.

Editing a campaign

1. Access the campaign.
2. Click **Actions** > **Edit**.

   The **Edit Campaign** dialog box appears.
3. Make the necessary changes.
4. To delete a campaign
   a. Click **Delete**.
   b. Click **OK** to confirm.
5. Click **Save**.

Adding campaign costs

To track the costs related to a campaign, you can enter campaign costs. Campaign costs are categorized by cost items. Before you can add campaign costs, you have to select an existing cost item or create a new cost item.

1. Access the campaign.
2. Click **Actions** > **Edit**.

   The **Edit Campaigne** dialog box appears.
3. Click the **Costs** tab.
4. Right-click in the table, and then select **Configure** > **Insert**.

   A new row is added to the table.
5. Complete the fields as required. For more information, see "Create/Edit Campaign dialog box, Costs tab options" on page 12.
6. Click **Save**.

Create/Edit Campaign dialog box, Costs tab options

Option	Description
Cost Item list	Name of the cost item.
Currency list	Currency of the cost item.
Description field	Description of the cost item.
Quantity field	Quantity of the cost item.
Unit cost field	Unit cost for the cost item.
Total field	Total cost for the cost item.

Editing a campaign cost

1. Access the campaign.
2. Click **Actions** > **Edit**.

   The **Edit Campaign** dialog box appears.
3. Click the **Costs** tab.
4. Make the necessary changes.

5. To delete the campaign cost:
   a. In the table, right-click the cost item row, and then select **Configure** > **Delete**.
   b. Click **OK** to confirm.
6. Click **Save**.

Adding a cost item to a campaign

1. Access the campaign.
2. Click **Actions** > **Edit**.

   The **Edit Campaign** dialog box appears.
3. Click **Add cost item**.

   The **Add Cost Item** dialog box appears.
4. In the **Cost item name** field, enter the name for the cost item.
5. Click **Save**.

Editing a cost item for a campaign

1. Access the campaign.
2. Click **Actions** > **Edit**.

   The **Edit Campaign** dialog box appears.
3. Click **Edit cost item**.

   The **Edit Cost Item** dialog box appears.
4. In the **Cost item** field, select the cost item.
5. In the **Cost item name** field, enter the new name for the cost item.
6. To delete the cost item:
   a. Click **Delete**.
   b. Click **OK** to confirm.
7. Click **Save**.

Accessing the campaign calendar

To include a campaign in the campaign calendar, you must select the option on the campaign profile. In the campaign calendar, a blue banner marks the days covered by a campaign.

1. Click **Marketing** > **Campaign Calendar**.

   The campaign calendar appears, displaying the current month.

2. To view the next or previous time period, at the top left of the calendar, click the right or left arrows.

3. To return to the current month, click **Today**.

4. To view the campaign profile, click the blue banner.

2. Managing competitor information

About competitors

You create competitors to store information about your organization's competitors. Competitor categories provide a way to organize competitors. Competitor categories can be nested within other competitor categories, and each level can have their own competitors listed under them. Competitors can be associated with opportunities for reporting purposes.

Accessing a competitor category

1. Click **Marketing** > **Competition**.

   The **Competition** tree view appears.

2. Click the competitor category.

   The competitor category profile appears.

Creating a competitor category

1. Click **New** > **Competitor category**.

   The **Create Competitor Category** dialog box appears.

2. In the **Category** field, enter a unique name for the competitor category.

3. To place this competitor category under an existing category, in the **Parent category** list, select an existing competitor category.

4. In the **Description** field, enter a description of the competitor category.

5. Click **Save**.

Editing a competitor category

1. Click **Marketing** > **Competition**.

   The **Competition** tree view appears.

2. Click the competitor category.

   The competitor category profile appears.

3. Click **Actions** > **Edit**.

   The **Edit Competitor Category** dialog box appears.

4. Make the necessary changes.
5. To delete the competitor category:
   a. Click **Delete**.
   b. Click **OK** to confirm.
6. Click **Save**.

Accessing a competitor

1. Click **Marketing** > **Competition**.

   The **Competition** tree view appears.
2. Expand the view to locate the competitor.
3. Click the competitor.

   The competitor appears.

Creating a competitor

1. Click **New** > **Competitor**.

   The **Create Competitor** dialog box appears.
2. In the **Competitor** field, enter the competitor's name.
3. In the **URL** field, enter the competitor's website address.
4. In the **Description** field, type any relevant information about the competitor.
5. Click the **Category** tab and select one or more competitorcategories for the competitor.
6. Click the **Strengths** tab and enter a description of the competitor's strengths.
7. Click the **Weaknesses** tab and enter a description of the competitor's weaknesses.
8. Click the **Summary** tab and enter a summary of the competitor.
9. Click **Save**.

Editing a competitor

1. Access the competitor.
2. Click **Actions** > **Edit**.

The **Edit Competitor** dialog box appears.

3. Make the necessary changes.
4. To edit a competitor:
   a. Click **Delete**.
   b. Click **OK** to confirm.
5. Click **Save**.

Measuring the performance of a competitor

To evaluate the performance of a competitor, you can calculate how frequently your organization competes against a specific competitor and how often this competitor wins. The performance is evaluated over a specific period of time and displayed as a percentage.

1. Access the competitor.
2. In the **Performance** section, click the **Calculate performance** link.

   The filter view appears.
3. To specify a fiscal period:
   a. Select **Fiscal period**.
   b. In the **Fiscal period selection** list, select the billing office that includes the fiscal periods.
   c. In the **Fiscal year** field, select the fiscal year.
   d. In the **Fiscal period** field, select one or more fiscal periods.
4. To specify a date range:
   a. Select **Date range**.
   b. In the **Start date** field, enter the start date.
   c. In the **End date** field, enter the end date.
5. Click **Go**.

   The profile displays the competitor's performance information within the specified time period.

3. Prospects and Leads

About prospects and leads

Changepoint allows you to track new potential customers interested in the products or services offered by your organization. Your sales team performs the necessary research on prospects to determine whether they are suitable for sales opportunities. If further research is required for a prospect, it can be assigned to a telemarketer. When it is determined that a prospect should be approached for sales possibilities, the prospect becomes a lead. The lead is then assigned to a sales representative.

Accessing a prospect

Prospects are listed in the **Prospects** tree view under the telemarketer they are assigned to or in the **Unassigned Prospects** folder, if no telemarketer has been assigned.

1. Click **Sales** > **Prospects**.

   The **Prospects** tree view appears.

2. Expand the tree view and select the prospect.

Creating a prospect

To create a prospect, you create a company with a sales status of **Prospect** or **Unprocessed**.

1. Create a company. For more information, see "Creating a companyclient" in the *Company and Contact Management User Guide*.
2. To leave the prospect unassigned, in the **Sales status** field, select **Unprocessed**.
3. To assign the prospect to a telemarketer:
   a. Click the **General** tab.
   b. In the **Sales status** list, select **Prospect**.
   c. Click the **Details** tab.
   d. In the **Telemarketer** list, select the resource.
4. Click **Save**.

Assigning an unprocessed prospect

1. Click **Sales** > **Prospects**.

   The **Prospects** tree view appears.

2. Expand the **Unprocessed prospects** folder and select the prospect.

   The prospect profile appears.

3. Click **Actions** > **Edit**.

   The **Edit Company** dialog box appears.

4. Click the **General** tab.

5. In the **Sales status** list, select **Prospect**.

6. Click the **Details** tab.

7. In the **Telemarketer** list, select the resource.

8. Click **Save**.

   The prospect displays under the selected resource in the **Prospects** tree view.

Changing a prospect into a lead

To change a prospect into a lead, you change its sales status to **Lead**. You can assign the lead to a sales representative.

1. Click **Sales** > **Prospects**.

   The **Prospects** tree view appears.

2. Expand the tree view and select the prospect.

   The prospect profile appears.

3. Click **Actions** > **Edit**.

   The **Edit Company** dialog box appears.

4. In the **Sales status** list, select **Lead**.

5. To assign the lead to a sales representative:

   a. Click the **Details** tab.

b. In the **Sales representative** type-ahead field, select a resource.

6. Click **Save**.

Reassigning a prospect

1. Click **Sales** > **Prospects**.

   The **Prospects** tree view appears.

2. Expand the telemarketer's name and select the prospect.

   The prospect profile appears.

3. Click **Actions** > **Edit**.

   The **Edit Company** dialog box appears.

4. Click the **Details** tab.

5. In the **Telemarketer** field, clear the name and then select a new resource.

6. Click **Save**.

Accessing a lead

Leads are listed in the **Leads** tree view under the sales representative they are assigned to or in the **Unassigned Leads** folder, if no sales representative has been assigned.

1. Click **Sales** > **Leads**.

   The **Leads** tree view appears.

2. Expand the tree view and select the lead.

   The lead profile appears.

Creating a lead

To create a lead, you create a company with a sales status of **Lead**.

1. Create a company. For more information, see "Creating a companyclient" in the *Company and Contact Management User Guide*.

2. In the **Sales status** list, select **Lead**.

3. To assign the lead to a sales representative:

a. Click the **Details** tab.

b. In the **Sales representative** type-ahead field, select the resource.

Assigning or reassigning a lead to a sales representative

1. Click **Sales** > **Leads**.

   The **Leads** tree view appears.

2. Expand the tree view and select the lead.

   The lead profile appears.

3. Click **Actions** > **Edit**.

   The **Edit Company** dialog box appears.

4. Click the **Details** tab.

5. In the **Sales representative** type-ahead field, select the resource.

4. Managing Opportunities

About opportunities

Opportunity profiles assist the sales department with sales opportunity consolidations and with managing account information, such as company profiles, engagements, projects, calls and meetings. Opportunity profiles allow sales representatives to view the forecast amount, probability, and status in the forecast rollup of individual or departmental pipeline reports.

Accessing an opportunity

1. Click **Sales** > **Opportunities**.

   The **Opportunities** tree view appears.

2. Expand the tree view and select the opportunity.

   The opportunity profile appears.

Creating an opportunity

You can create an opportunity by first completing the mandatory general fields and then adding to the opportunity as required.

1. Click **New** > **Opportunity**.

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

2. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, General tab options" on page 24.

3. Click **Save**.

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

   - "Entering fixed fee forecast information" on page 29
   - "Entering product forecast information" on page 30
   - "Entering service forecast information" on page 32
   - "Entering expense forecast information" on page 35
   - "Specifying the resources for a sales team" on page 26
   - "Restricting access to an opportunity" on page 25

- "Entering the outcome of an opportunity" on page 40
- "Adding a comment to the opportunity history" on page 25

Create/Edit Opportunity dialog, General tab options

Option	Description
Opportunity field	Name of the opportunity.
Alternate name field	Alternate name for the opportunity. Typically used to display the name in a different language or using a different alphabet.
Company type-ahead field	Company for which the opportunity is being created.
Main contact list	Company contact for the opportunity.
Sales representative type-ahead field	Resource who is responsible for the opportunity.
Staffing workgroup type-ahead field	Workgroup to be used in resource demand calculations. Default is the workgroup of the sales representative.
Currency field	Currency for the opportunity. Only billing offices that have rates for the selected currency are listed.
Billing office type-ahead field	Billing office for the opportunity, which determines the service rates to be used on the **Forecast** tab. Mandatory if you are capturing service forecast information. The **Services** tab is displayed only when a billing office is selected.
Billing type list	Basis for billing rate calculations (for example, daily, hourly, fixed fee, or mixed). Determines what billing rates are used and how service forecast information is entered.
Source list	Campaign associated with the opportunity. The campaign identifies where the opportunity came from, such as a trade show.
Type list	Opportunity type.

Option	Description
Priority list	Priority of the opportunity.
Request type-ahead field	Number of the request from which the opportunity was created, or that is associated with the opportunity.
Product field	Product item that is associated with the opportunity, either directly or through a request.
Fiscal period type-ahead field	Billing office whose fiscal periods are used when displaying the forecast information across fiscal years.
Cost center list	Cost center whose burden rates are used for services.
Description field	Description of the opportunity.

Adding a comment to the opportunity history

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **History** tab.
4. In the **Comments** field, enter your comments.
5. Click **Save**.

Restricting access to an opportunity

You can restrict access to an opportunity to specific resources only.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **Access** tab.
4. Select the **Restrict access to the following resources** check box.

5. In the **Preferred Resources** list, select the resources.

   Tip: To select other resources and optionally add them to your preferred resources, click **Manage Resources**.

6. Click the up arrow.
7. To add resources to your preferred resources list, click the **Manage resources** link.
8. To remove access from specific resources:
   a. Select the resources.
   b. Click the down arrow.
9. Click **Save**.

Specifying the competitors for an opportunity

You can track your organization's competitors for an opportunity and use the information to evaluate the competitor's performance.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.

3. Click the **Outcome** tab.
4. In the **Competitors** list, select the competitors.
5. To add a competitorto the list, click **Add Competitor**. For more information, see "Creating a competitor" on page 16.
6. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Outcome tab options" on page 40.
7. Click **Save**.

Specifying the resources for a sales team

You can specify the resources who are involved with the opportunity.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

The **Edit Opportunity** dialog box appears.

3. Click the **Sales team** tab.
4. To add resources:
   a. In the **Preferred Resources** list, select the resources.
   b. Click the up arrow.
5. To select other resources and optionally add them to your preferred resources list, click the **Manage resources** link.
6. To remove resources:
   a. Select the resources in the **Sales team** list.
   b. Click the down arrow.
7. Click **Save**.

About forecasting revenue for opportunities

You can track the potential revenue for an opportunity in the forecast tabs: **Fixed fees**, , **Services** and **Expenses**. The information from the tabs is summarized in the **Forecast** tab.

About displaying fiscal periods in the forecast tabs

If a billing office is specified in the **Fiscal period** field on the opportunity, then the fiscal periods for the billing office are displayed on each of the forecast tabs, as well as the following columns:

- Totals – totals for each of the columns in the tab across all fiscal periods
- Remaining total – amounts for the columns in the tab that are currently hidden

Amounts that you enter for forecast items are automatically distributed to the fiscal periods.

About burden rates on services forecasts

The cost center selected on the opportunity determines the burden rate to apply to cost rates when a specific resource is not selected.

- If a resource is specified, the resource's cost center overrides the opportunity's cost center.

- If no cost center is defined for the resource, or no burden rates are defined for the cost center, then the cost center for the resource’s workgroup determines the burden rate.
- If no cost center is defined for the resource's workgroup, or no burden rates are defined for the cost center, then the cost center for the resource's global workgroup determines the burden rate.
- If no cost center is defined for the resource's global workgroup, or no burden rates are defined for the cost center, then the cost center specified for the opportunity determines the burden rate.

Forecasting revenue for an opportunity

The **Revenue forecast** field on the **Forecast** tab of the opportunity profile is not updated automatically. You can either enter an amount manually, or update the amount based on the revenue forecast totals by clicking the **Update revenue** button on the **Forecast** tab.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **Forecast** tab.
4. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Forecast tab options" on page 29.
5. Click **Save**.
6. For more information about completing the remaining forecast tabs, see the following topics:
   - "Entering fixed fee forecast information" on page 29
   - "Entering product forecast information" on page 30
   - "Entering service forecast information" on page 32
   - "Entering expense forecast information" on page 35

Create/Edit Opportunity dialog, Forecast tab options

Option	Description
Status list	Status of the opportunity.
Probability (%) list	Percent probability of making the sale for the opportunity. If your organization uses fixed percentages based on status, this field is not available.
Revenue forecast field	Estimated revenue from the opportunity.
Include the opportunity in the forecast rollup check box	When selected, the opportunity is included in the forecast rollup, opportunity analysis, and resource demand analysis calculations.
Initial close field	Date that the opportunity is expected to close. Once saved, this date cannot be changed because it is used as a baseline.
Revised close field	Revised date that the opportunity is expected to close.
Update Revenue button	Updates the **Revenue forecast** field with the total revenue amount from the summary table .

Entering fixed fee forecast information

You can enter the estimated revenue from fixed fees that will be billed to a customer for specific deliverables.

Note: The **Fixed fees** tab is available only if the opportunity has a fixed fee or mixed billing type.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **Fixed fees** tab.

4. Right-click in the table, and then select **Insert**.
5. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Fixed fees tab options" on page 30.
6. Click **Save**.

Create/Edit Opportunity dialog, Fixed fees tab options

Option	Description
First column	The first column displays status icons as required: • – service is associated with a funding source. • – service is locked from the RMW by another resource, and cannot be saved until it is unlocked there. • – service was last saved in the RMW and you should review the changes. The icon will be removed after you save the service.
Deliverable field	Name of the deliverable.
Deliverable date field	Date that the deliverable is to be billed
Capital check box	When selected, designates the fixed fee amount as capital.
Comments field	Comments regarding the fixed fee deliverable.
Total amount field	Amount to bill the customer for the fixed fee deliverable.

Entering product forecast information

You can track the specific components that may produce revenue for the opportunity, such as product licenses or product support.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.

3. Click the **Products** tab.
4. Right-click in the table, and then select **Insert**.
5. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Products tab options" on page 31.
6. Click **Save**.

Create/Edit Opportunity dialog, Products tab options

Option	Description
First column	The first column displays status icons as required: • – service is associated with a funding source. • – service is locked from the RMW by another resource, and cannot be saved until it is unlocked there. • – service was last saved in the RMW and you should review the changes. The icon will be removed after you save the service.
Product type-ahead field	Product name.
Capital check box	When selected, designates the product revenue as capital.
Description field	Description of the product.
Date field	Date that the revenue for the product will be generated.
Quantity field	Number of units of the product. The quantity can be a negative value, for example, to indicate a credit or a return.
Standard unit price field	Standard price for the product.
Discount (%) field	Discount in percent to be applied to the standard unit price. To mark up the amount, enter a negative percent.

Option	Description
Negotiated unit price field	The negotiated price per unit of the product, which is calculated as follows: Standard unit price * Discount percent
Standard unit cost field	Standard cost per unit of the product.
Negotiated unit cost field	The negotiated cost per unit of the product.
Totals	
Total quantity field	Total units for the product.
Average unit price field	Average unit price of the product. Appears only when a fiscal period is selected.
Average unit cost field	Average unit cost of the product. Appears only when a fiscal period is selected.
Total billing amount field	Total amount to be billed for the product.
Total cost amount field	Total cost of the product.
Margin field	Total margin for the product (billing amount minus the cost).

Entering service forecast information

You can enter information related to services for the opportunity, for example installation, training, or other professional services.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **Services** tab.
4. Right-click in the table, and then select **Insert**.

5. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Services tab options" on page 33.
6. Click **Save**.

Create/Edit Opportunity dialog, Services tab options

Option	Description
First column	The first column displays status icons as required: • – service is associated with a funding source. • – service is locked from the RMW by another resource, and cannot be saved until it is unlocked there. • – service was last saved in the RMW and you should review the changes. The icon will be removed after you save the service.
Billing office type-ahead field	Billing office whose rates are used for the service.The opportunity's billing office is selected by default. If you select a different billing office, the opportunity's billing office will still determine if the opportunity uses billing role-based cost rates or resource-based cost rates and exchange rates in triangulation.
Billing role field	Billing role for the service.
Resource type-ahead field	Resource who will perform the work for the service.
Function list	Function associated with the service.
Use rates from the billing office check box	When selected, the rates from the billing office are used instead of negotiated rates. Note that the check mark is cleared after you save the service. For more information, see "About using rates for services" on page 35.
Fixed fee list	Fixed fee schedule associated with the service. This field appears only when the fixed fee or mixed billing type is selected for the opportunity.

Option	Description
Capital check box	When selected, designates the service as a capital cost.
Comments field	Additional information about the service.
Start date field	Estimated date the service will begin.
End date field	Estimated date the service will end.
Hours or **Days** field	Estimated number of hours or days required for the service. The label on this field depends on the billing type.
Currency list	Currency for the service rates. The default is the currency of the opportunity's billing office, if the same currency has been set up in the billing role.
Standard billing rate field	Standard billing rate for the billing role.
Discount (%) field	Percentage discount
Negotiated billing rate field	The negotiated billing rate (standard billing rate minus discount) for the service.
Standard cost rate field	The standard cost rate for this service.
Negotiated cost rate field	The negotiated cost rate (standard cost rate minus discount) for this service.
Totals	
Total hours field	Total hours for the service.
Average billing rate field	Average billing rate of the service. This field appears only when a fiscal period is selected.
Average cost rate field	Average cost rate of the service for the opportunity. This field appears only when a fiscal period is selected.

Option	Description
Total billing amount field	Total billing amount for the service, which is calculated by multiplying the number of estimated hours or days by the negotiated rate of the resource or service.
Total cost amount field	Total cost amount for the service, which is calculated by multiplying the number of estimated hour or days by the resource-based cost rate or billing role-based cost rate.
Margin field	Difference of total billing amount minus the total cost amount.

About using rates for services

By default, the billing and cost rates from the billing office are used for services. If a service covers more than one fiscal period, then for each fiscal period, the billing and cost rates that are in effect on the start date of the fiscal period are used.

If the billing office is set to use resource-based cost rates, then the service uses the cost rate defined in the resource's profile.

However, if you enter negotiated rates for the service, then the negotiated rates are used for all fiscal periods covered by the service.

Entering expense forecast information

You can enter information about estimated expenses for the opportunity.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **Expenses** tab.
4. Right-click in the table and then select **Insert**.
5. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Expenses tab options" on page 36.
6. Click **Save**.

Create/Edit Opportunity dialog, Expenses tab options

Option	Description
First column	The first column displays status icons as required: • – service is associated with a funding source. • – service is locked from the RMW by another resource, and cannot be saved until it is unlocked there. • – service was last saved in the RMW and you should review the changes. The icon will be removed after you save the service.
Category list	Expense category.
Type list	Expense type.
Capital check box	When selected, the expense is a capital cost.
Comments field	Comments about the expense.
Date field	Date that the expense will be incurred.
Quantity field	Quantity.
Standard unit cost field	Standard cost for the expense.
Negotiated unit cost field	Negotiated cost for the expense.
Billable check box	When selected, the expense is billable.
Billing percentage field	Percentage of the expense that is billable.
Totals	
Quantity field	Total quantity of all expenses.
Unit cost field	Unit cost of expenses. This field is only displayed when a fiscal period is selected.
Billing amount field	Total amount being billed for all expenses.

Option	Description
Cost amount field	Total cost of all expenses.
Margin field	Difference of total billing amount minus total cost amount

Editing an opportunity

Editing certain fields will cause some forecast information to be reset. For example, changing the billing type, currency or billing office can reset items in the various forecasts.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Make the necessary changes.
4. To associate a funding source with the opportunity, click **Associate Funding Source** (if visible).

   The **Associate Funding Source** dialog box appears. For more information, see "Associating an entity to a funding source" in the *Financial Management User Guide*.
5. Click **Save**.

About changing the close date on opportunities

If you change the **Revised close** date on the **Forecast** tab, the dates for the forecast items are changed relative to the new close date as follows:

- The dates are changed only on opportunities for which the outcome is won or for which an outcome has not been specified, and that have not been associated to an engagement. The dates are not changed on opportunities that have any other outcome, or are locked.
- If the new close date is in the future, then the service, fixed fee, product or expense with the earliest date is changed to the same date as the new close date. The dates for the other records are changed relative to how many days later they are than the item with the earliest date.
- The close date is based on the following dates in order of preference:

- Outcome date
- Revised close
- Initial close

Note: The changes are not displayed immediately, but only after the dates are changed during a scheduled job run, which typically occurs overnight.

Editing a forecast item

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the tab (**Fixed fees**, **Products**, **Services**, or **Expenses**) that includes the forecast item.
4. Make the necessary changes.
5. To delete a forecast item
   a. Right-click the item and then click **Delete**.
   b. Click **OK** to confirm.
6. Click **Save**.

Associating a forecast item with a funding source

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the tab (**Fixed fees**, **Products**, **Services**, or **Expenses**) that includes the forecast item.
4. In the table, right-click the row of the forecast item and select **Associate funding source**.

   The **Associate funding source** dialog box appears. For more information, see in the *Financial Management User Guide*.
5. Click **Save**.

Copying a forecast item

1. Access the opportunity.
2. Click **Actions > Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the tab (**Fixed fees**, **Products**, **Services**, or **Expenses**) that includes the forecast item.
4. In the table, right-click the item, and then click **Copy**.

   A copy of the item is added to the table.
5. Edit the item.
6. Click **Save**.

Changing the fiscal periods that are displayed for an opportunity

If fiscal periods are specified for an opportunity, the current fiscal period, the previous fiscal period, and the next 12 fiscal periods are displayed by default in the opportunity forecast item views. You can change the fiscal periods that are displayed, but the total number of fiscal periods cannot exceed 14.

1. Access the opportunity.
2. Click **Actions > Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click **Filter**.

   The **Filter** dialog box appears.
4. Select the check boxes for the fiscal periods that you want to display.

   Tip: To display the default fiscal periods again, select the **Reset to default** check box.
5. Click **OK**.

Deleting an opportunity

1. Access the opportunity.
2. Click **Actions > Edit**.

The **Edit Opportunity** dialog box appears.

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

Entering the outcome of an opportunity

You can enter or change the outcome of an opportunity at any time. You can also lock the forecast tabs to prevent changes to the forecast information.

1. Access the opportunity.
2. Click **Actions** > **Edit**.

   The **Edit Opportunity** dialog box appears.
3. Click the **Outcome** tab.
4. Complete the fields as required. For more information, see "Create/Edit Opportunity dialog, Outcome tab options" on page 40.
5. Click **Save**.

Create/Edit Opportunity dialog, Outcome tab options

Option	Description
Competitors list	List of competitors.
Add competitor button	Displays the **Create Competitor** dialog box.
Outcome details section	Indicates the outcome. Options are: • Won • Lost • No outcome • Other
Outcome date field	Date of the outcome. Appears only when an outcome option is selected.

Option	Description
Lock forecast check box	When selected, prevents editing in the **Products** tab, **Services** tab, and **Expenses** tab, and the **Revenue forecast** field in the **Forecast** tab.
Outcome details field	Comments about the outcome.
Winning competitor list	Competitor that won the opportunity. Displays only if **Lost** is selected for the outcome of the opportunity.

5. Creating New Entities from Opportunities

About copying opportunity information to create new entities

You can use opportunities that have been selected for project implementation to create the following entities:

- a new opportunity
- a new engagement
- a new project

When you create an entity directly from an opportunity, the information from the opportunity is automatically copied to it.

Copying the opportunity forecast information to a new opportunity

You can copy the forecast information of an existing (source) opportunity to a new (target) opportunity. For each of the source forecast tabs that contain information, you can specify the number of fiscal periods to move the information forward or back in the target forecast tabs.

1. Access the opportunity profile that contains the forecast information.
2. Click **Actions > Copy opportunity forecast**.

   The **Copy Opportunity Forecast** dialog box appears.
3. To specify the company, do one of the following:
   - In the **Company** type-ahead field, select the name of the company.
   - In the **Company** type-ahead field, select the company ID.
4. In each of the following fields, enter the number of fiscal periods to move the forecast items in the target opportunity. To move back, enter a negative number:
   - **Number of fiscal periods to move fixed fees**
   - **Number of fiscal periods to move products**
   - **Number of fiscal periods to move services**
   - **Number of fiscal periods to move expenses**

5. Click **Save**.
6. Click **OK** to confirm.

   The **Create Opportunity** dialog box appears.
7. Complete the fields as required. For more information, see "Creating an opportunity" on page 23.
8. Click **Save**.

About creating engagements from opportunities

When you create an engagement from an opportunity, information from the opportunity is copied to the engagement.

Most fields are named the same in both the opportunity and engagement, with the following exceptions:

- The **Revenue forecast** field in the opportunity is mapped to the **Contract amount** field in the engagement.
- There are some minor differences in the labels for some of the forecast items. For example, the fixed fee deliverable date for the opportunity is mapped to the fixed fee billing date for the engagement.
- Fixed fees for fiscal periods in the opportunity are saved as schedule items under the **Fixed-fee schedule** section of the engagement.
- If your organization uses resource requests, then the **Resource** field is not copied from the **Services** tab.

Creating an engagement from an opportunity

1. Access the opportunity.
2. Click **Actions** > **Create** > **Engagements**.

   A message appears, asking which currency you want to use.
3. Do one of the following:
   - To use the currency that was specified for the opportunity, click **OK**.
   - To use the original currency of the billing rates, click **Cancel**.

The **Create Engagement** dialog box appears.

4. Complete the engagement. For more information, see the *Engagement Management User Guide*.
5. Click **Save**.

About creating projects from opportunities

When you create a project from an opportunity, the project-related information is automatically copied to the project from the opportunity. On the **General** tab, the planned start date and planned finish dates are the earliest start date and the latest end date from the **Services** tab. The planned hours are the total hours from the **Services** tab. Some of the fields in the **Budget information** tab come from the opportunity as follows:

- **Labor** – service cost totals
- **Other expense** – product cost totals
- **Project value** – forecast revenue total

Creating a project from an opportunity

1. Access the opportunity.
2. Click **Actions** > **Create** > **Project**.

   The **Create Project from Opportunity** dialog box appears.
3. Complete the fields as required. See "Create Project from Opportunity dialog box options" on page 46.
4. Click **Save**.
5. If the **Additional Information** dialog box appears, complete the mandatory fields.
6. A message about the default billing role appears. Click **OK** to proceed.
7. Click **Save**.
8. If you created tasks during this procedure, you should immediately roll up the project to ensure that the project information includes all of the task information. For more information, see "Rolling up a project" in the *Project Management User Guide*.

Create Project from Opportunity dialog box options

Option	Description
New project	
Name of new project field	Project name.
Company type-ahead field	Company associated with the new project. By default, the company associated with the opportunity displays in the field.
Company ID type-ahead field	Identification of the company.
Engagement list	Engagement associated with the new project.
Project manager type-ahead field	Project manager of the new project.
Default resource list	Resource to be used when creating or copying tasks during project creation when a resource is either not specified or not available.
Default billing role list	Select a billing role to be used if the billing role of the engagement selected for the target project is different than the billing role associated with the task creation method selected. The default billing role is used for each task created.
Create or copy tasks	
Create tasks from service forecast option	When selected, automatically creates a task for each service forecast revenue row in the opportunity.
Copy tasks from existing project option	When selected, tasks are copied from the project in the following **Project** field.
Company type-ahead field	Company associated with the project to copy tasks from.

Option	Description
Engagement list	Engagement associated with the project to copy tasks from.
Project list	Project to copy tasks from.
Copy selected work locations and work codes from existing project check box	When selected, the work locations and work codes from the source project that are valid for the engagement of the target project are copied to the target project. If they are not valid, then the default values from the target engagement are used. The settings for the **Allow expense location override** and the **Allow non-project locations** check boxes are also copied.

Option	Description
Copy selected work locations and work codes from existing tasks and task assignments check box	When selected, the default work location and work codes from the tasks and task assignments of the source project that are valid for the new project, are copied to the new task and task assignments. If the default work location and work code from the tasks and task assignments of the source project are not valid for the target project, then the default values from the target project are used. The values for the **Allow work location override** and the **Allow work code override** check boxes are also copied from the source task and task assignments to the new tasks and task assignments.
Base new timescale on fields	Specifies whether the dates for target tasks are determined relative to the project start or end date as follows: • **Start date** – if the source task started 15 days after the start date on the source project, then the target task starts 15 days after the start date on the target project. • **End date** – if the source task ends 90 days after the end date on the source project, then the target task ends 90 days after the end date on the target project. By default, the start date is the revised close date from the opportunity. If no revised close date exists, then the initial close date is used.

About creating tasks from the service forecast of an opportunity

When you select the option to create tasks from the service forecast of an opportunity, a task is created for each service forecast row on the **Services** tab of the source opportunity. The following table lists the task fields that are automatically completed based on the service forecast information.

Task field	Field from service forecast row
Name	**Function** (if specified) or **Billing role**
Planned start	**Start date**
Planned finish	**End date**
Planned hours	**Hours**
Resource (task assignments)	**Resource**. If the resource is not specified or not available, then the default resource selected on the **Create Project from Opportunity** dialog box is used.
Billing role	**Billing role**. If the billing role of the opportunity is different from the billing role of the engagement, then the default billing role selected on the **Create Project from Opportunity** dialog box is used.

Copying tasks when creating a project from an opportunity

You can copy tasks from projects for which the project manager (of the target project) has access to create tasks. Planned hours on the target tasks are set to zero.

1. Complete the top section of the **Create Project from Opportunity** dialog box. For more information, see "Creating a project from an opportunity" on page 45.
2. Select the **Copy tasks from existing project** option.
3. Complete the fields as required. For more information, see "Create Project from Opportunity dialog box options" on page 46.
4. Click **Save**.
5. If the **Additional Information** dialog box appears, complete the mandatory fields.
6. If the **Validation Report** dialog box appears, the task assignments are causing one or more resources to be overbooked. Do one of the following:
   - To level the task assignments and correct the scheduling conflicts, click **Level all Tasks**.
   - To save the new project and task assignments with the conflicts, click **Accept**.

A message about the default billing role appears.

7. Click **OK** to proceed.
8. Click **Save**.
9. Roll up the project to ensure that the project information includes all of the task information. For more information, see "Rolling up a project" in the *Project Management User Guide*.

6. Products and Services

About products and services

Changepoint allows you to create and maintain a repository of products developed and delivered by your organization. This repository centralizes all product information, such as costs, prices, start and end dates for availability, technical contacts, business contacts, and so on.

Products can include software, hardware, or a package of services, such as a maintenance contract or service offerings, and can be associated with other entities in the system, such as opportunities, engagements, projects or requests.

Products are grouped in product categories that can be nested within parent product categories.

Accessing a product category

1. Click **Marketing** > **Products**.

   The **Products** tree view displays the product categories.

2. If necessary, expand the parent categories and select the product category.

   The product category profile appears.

Creating a product category

1. Click **New** > **Product category**.

   The **Create Product Category** dialog box appears.

2. Complete the fields as required. For more information, see "Create/Edit Product Category dialog box options" on page 52.

3. Click **Save**.

Create/Edit Product Category dialog box options

Option	Description
Product category field	Name of the product category.
Business contact type-ahead field	Resource who is the business contact for the product category.
Parent list	If a parent product category is selected in the **Parent** list, the category being created or edited becomes a subcategory of the selected category.
Budget burden rate field	Burden rate percentage to be applied to products in the category when they are added to budgets.
Allow override of burden rate check box	When enabled, allows resources to enter a different burden rate on the budget.
Description field	Description of the category.

Editing a product category

1. Access the product category.
2. Click **Actions** > **Edit**.

   The **Edit Product Category** dialog box appears.
3. Make the necessary changes. For more information, see "Create/Edit Product Category dialog box options" on page 52.
4. Click **Save**.

Deleting a product category

When you delete a product category, all products categories under this category are also deleted.

1. Access the product category.
2. Click **Actions** > **Edit**.

The **Edit Product Category** dialog box appears.

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

Accessing a product

1. Click **Marketing** > **Products**.

   The **Products** tree view displays the product categories.

2. Expand the product categories and select the product.

   The product profile appears.

Creating a product

1. Click **New** > **Product**.

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

2. Complete the fields as required. For more information, see "Create/Edit Product dialog, General tab options" on page 53.
3. Click **Save**.
4. To continue completing the product, see the following topics:
   - "Adding or removing a resource in the product team" on page 54
   - "Specifying the price for a product" on page 55

Create/Edit Product dialog, General tab options

Option	Description
Product field	Name of the product.
Product category field	Category of the product.
Business contact type-ahead field	The business contact for the product

Option	Description
Technical contact type-ahead field	The technical contact for the product.
Product number field	Number assigned to the product.
Available for check boxes	The availability of the product in: • Engagements, Projects, and Tasks • Opportunities • Requests and Request SLAs • Creating requests through the Client Portal.
Product status field	Status of the product.
Open date field	Date when the product becomes available. **Note:** This date does not restrict your ability to select the product, for example, in engagements.
Close date field	Date after which the product is no longer available. **Note:** This date does not restrict your ability to select the product, for example, in engagements.
Unit cost field	Unit cost of the product
Cost currency field	Currency of the cost of the product.
Fixed unit cost check box	When selected, if the product is included in a request that uses the effort and product billing type, only the unit price of the product will be billed. Time entered for the request is not billable.
Description field	Description of the product.

Adding or removing a resource in the product team

The **Team** tab lists resources who work on, or have specific knowledge related to, the product. The resources that are available for selection are from your preferred resources list.

1. Do one of the following:

   - Create a product.

- Access the product for editing.

2. Click the **Team** tab.
3. To add resources to the product team:
   a. Click **Add User**.

      The **Select Team Members** dialog box appears.

   b. Expand the tree view to locate and select the workgroups or individual resources that you want to add to the product team.
   c. Click **Add**.

      The resources are added to the team list.

4. To remove resources:
   a. In the team list, select the resources.
   b. Click **Remove User**.
5. Click **Save**.

Specifying the price for a product

You can specify prices in one or more currencies.

1. Do one of the following:
   - Create a product.
   - Access the product for editing.
2. Click the **Price** tab.
3. Right-click in the table and select **Insert**.

   A new row is added to the table.

4. In the **Currency** cell of the new row, select the currency.
5. In the **Standard price** cell, enter the price.
6. Click **Save**.

Editing a product

1. Access the product.
2. Click **Actions** > **Edit**.

   The **Edit Product** dialog box appears.
3. Make the necessary changes. For more information, see "Creating a product" on page 53.
4. Click **Save**.

Deleting a product

1. Access the product.
2. Click **Actions** > **Edit**.

   The **Edit Product** dialog box appears.
3. Click **Delete**.
4. Click **OK** to confirm.

7. Sales Opportunity Analysis

About analyzing opportunities

You can do the following to analyze opportunities:

- Sort, filter, and view opportunities in a list
- Group opportunities into an opportunity scenario so that you can compare them. You can also compare different opportunity scenarios.

You can also perform a resource demand analysis for opportunities and opportunity scenarios. For more information, see "Resource Demand Analysis" in the *Resource Management User Guide*.

Note: For an opportunity to be included in the analysis process, the option to include the opportunity in the forecast rollup must be enabled on the opportunity.

Analyzing opportunities

1. Click **Services** > **Opportunity Analysis**.

   The **Scenario Selection** view appears.

2. Click **Actions** > **Initiate analysis**.

   The filter criteria view appears.

3. To filter the opportunities that are included, select a value other than **All** in one or more of the fields.

   Note: You must select **All** in the **Priority** list to ensure that all selected opportunities are included in the demand analysis.

4. Click **Go**.

   The **Opportunity Analysis** view displays the opportunities that match the filter criteria.

5. Use the right-click menu to filter, sort, and isolate specific opportunities for further analysis.

6. To view an opportunity profile, double-click the row.

7. From this point, you can create an opportunity scenario. For more information, see "Creating an opportunity scenario" on page 58.

Creating an opportunity scenario

You can create an opportunity scenario based on the opportunities in the **Opportunity Analysis** view. You can then add and remove opportunity members from the opportunity scenario. You can also create new opportunity scenarios based on existing opportunity scenarios.

1. Initiate the opportunity analysis. For more information, see "Analyzing opportunities" on page 57.
2. In the **Opportunity Analysis** view, click the rows of the records you want to include in the scenario.
3. Click **Actions** > **Create** > **Scenario**.

   The **Scenario** view appears.
4. Complete the fields as required. For more information, see "Scenario view options" on page 58.
5. Click **Actions** > **Save**.

Scenario view options

Fields	Description
Scenario name field	Name of the scenario.
Description field	Description of the scenario.
Benefits field	Benefits of the scenario.
Risks field	Risks of the scenario.
Sponsor type-ahead field	Resource who is backing the opportunity
Billing office type-ahead field	The billing office whose fiscal periods are used for revenue and cost amounts.

Accessing an opportunity scenario

1. Click **Services** > **Opportunity Analysis**.

The **Scenario Selection** view appears.

2. Double-click the opportunity scenario.

   The scenario profile appears.

3. To view the opportunities that are included in the scenario, expand the **Scenario members** section.

Editing an opportunity scenario

You can edit the details for an opportunity scenario and change the opportunities that are included in the scenario. You can also create new opportunity scenarios based on existing opportunity scenarios.

1. Access the opportunity scenario.

   The scenario profile appears.

2. Click **Actions > Edit**.

   The **Scenario** view appears.

3. Make the necessary changes in the **General** section.

4. To add or remove opportunities, expand the **Scenario members** section. For more information, see "Adding and removing opportunities from a scenario" on page 59.

Adding and removing opportunities from a scenario

You can add opportunities to, and remove opportunities from an opportunity scenario. To remove opportunities , you must reselect only the opportunities that you want to include.

1. Access the opportunity scenario.

2. Expand the **Scenario members** section.

3. To add opportunities :

   a. Click **Actions > Edit members**.

   b. Click **Actions > Add members**. The **Opportunity Analysis** view appears.

   c. Select the values for the fields as required.

   d. Click **Go**.

The opportunities that match the filter criteria are added to the **Scenario members** section.

4. To remove opportunities , select only the opportunities that you want to include.
5. In the **Scenario members** section, click **Actions** > **Save**.

Creating an opportunity scenario from an existing scenario

1. Access the opportunity scenario.
2. Expand the **Scenario members** section.
3. In the **Scenario members** section, click **Actions** > **Edit members**.
4. Select the opportunities that you want to include in the new scenario.
5. Click **Actions** > **Save as new scenario**.

   The **Scenario Details** view appears.
6. Complete the fields as required. For more information, see "Creating an opportunity scenario" on page 58.
7. Click **Actions** > **Save**.

Deleting an opportunity scenario

1. Access the opportunity scenario.
2. Click **Actions** > **Delete** > **Scenario**.
3. Click **OK** to confirm.

Editing an opportunity from a scenario

You can make the following changes to an opportunity directly from an opportunity scenario:

- mark the opportunity as won
- change the status of the opportunity
- lock the opportunity

To make any other changes to an opportunity, you must access the opportunity directly. For more information, see "Editing an opportunity" on page 37.

1. Access the opportunity scenario.
2. Expand the **Scenario members** section.
3. Select the opportunity.
4. To mark the opportunity as won, click **Actions** > **Mark as won**.
5. To change the status of the opportunity:
   a. Click **Actions** > **Change status**. The **Change Status** dialog box appears.
   b. In the **Status** list, select the new status and then click **OK**.
6. To lock the opportunity, click **Actions** > **Lock**.

About viewing opportunities in a Gantt chart

You can compare opportunities from opportunity scenarios in a Gantt chart. The Gantt chart provides a rolled-up summary of each opportunity that is included. The summary is based on forecast information from the opportunity.

Each selected opportunity is displayed as one row in the Gantt chart. When you view an opportunity scenario in a Gantt chart, its member opportunities are displayed in the chart. Each opportunity is listed only once, even if the opportunity is included in more than one opportunity scenario.

The duration of the opportunities is based on the forecast start and end dates for service items on the opportunity forecast. The purple diamond (milestone) indicates when a start date is in the past and therefore the opportunity cannot be charted.

Viewing opportunities from a scenario in a Gantt chart

An opportunity will only be displayed once in a Gantt chart, even if it is included in more than one opportunity scenario.

To view the opportunities from the Scenario Selection view in a Gantt chart

1. Click **Services** > **Opportunity Analysis**.

   The **Scenario Selection** view appears.
2. To view the opportunities from one or more of the scenarios in a Gantt chart, do one of the following:

- To view the opportunities from all of the scenarios in a Gantt chart, click **Actions** > **View** > **Gantt chart**.
- To view the opportunities from some of the scenarios, select the scenarios, and then click **Actions** > **View** > **Gantt chart**.

To view the opportunities from an opportunity scenario in a Gantt chart:

a. Access the opportunity scenario.

b. Expand the **Scenario members** section.

c. Do one of the following:

- To view all of the opportunities in a Gantt chart, click **Actions** > **View** > **Gantt chart**.
- To view two or more of the opportunities in a Gantt chart, select the opportunities, and then click **Actions** > **View** > **Gantt chart**.

About sales reports

There are two types of sales reports reports:

- **Portlet reports** – For more information, see the *User Basics User Guide*.
- **Standard Changepoint reports** – The following reports are available:
  - Campaign Profitability (Marketing report category)
  - Competition by Frequency (Competition Analysis report category)
  - Opportunity Outcome: Lost (Competition Analysis and Opportunity Management report categories)
  - Opportunity Outcome: Won (Competition Analysis and Opportunity Management report categories)

8. Scenario Comparisons Worksheet

About the scenario comparisons worksheet

In the scenario comparisons worksheet, you can create scenarios to compare information from any combination of the following items:

- entities:
  - engagements
  - opportunities
  - requests
  - projects
- scenarios:
  - comparison scenarios
  - request scenarios
  - resource demand scenarios
  - opportunity scenarios
- project portfolios

You can then add one or more scenarios to a *scenario comparison*, in which you can compare the scenarios by using the default amounts of cost, effort, margin and revenue. Additionally, you can create shared configurable fields to reflect your own customized measurements to be used in scenarios, for example: rating scores, business criticality, investment category, risk rating, and so on.

About editing fields in the scenario comparisons worksheet

You can edit most of the standard fields and all of the configurable fields that are displayed in the scenario comparisons worksheet.

There are some differences in behavior between the scenario comparisons worksheet and the entity dialog boxes. The differences are as follows:

- Some standard fields cannot be edited in the scenario comparisons worksheet. For a complete list of fields, see "Troubleshooting the scenario comparisons worksheet" on page 99.
- For the project entity, the **Comments** field is called **Description** in the scenario comparisons worksheet.

  Note: You must lock the rows that contain the fields before you can edit the fields.

Creating a scenario comparison

1. Specify the items (entities, scenarios or project portfolios) whose data you want to include in the scenario comparison by creating a scenario comparisons filter, and then display the filter. For more information, see "About selecting items for a scenario comparison" on page 85.
2. Specify the data (from the items that you specified in the filter) that you want to include as columns in the scenario comparison by creating a scenario comparison view, and then display the view. For more information, see "About selecting the data for a scenario comparison" on page 75.
3. Display the filter and the view. The combination of the items from the scenario comparison filter and the data fields from the scenario comparison view make up the scenario comparison.

Scenario comparison worksheet basics

When you access the scenario comparisons worksheet for the first time, or if you have not specified a default scenario comparison filter, the **Manage Filters** dialog box appears. You must either select an existing filter or create a new filter to proceed. For more information, see "About selecting items for a scenario comparison" on page 85.

After you select or create a filter, the system default view displays, which displays the following columns in order from left to right:

- **Customer**
- **Entity type**
- **Name** (of the entity, or request number for requests)
- **Effort**, **Cost**, **Revenue**, **Margin** columns and **Totals** column (if selected)

The **Customer**, **Entity** type and **Name** columns are *frozen*; that is, they remain in a fixed position when you scroll to the right to view the other columns.

Accessing the scenario comparisons worksheet

1. Do one of the following:
   - Click **Marketing** > **Scenario Comparisons**.
   - Click **Services** > **Scenario Comparisons**.
2. If the **Manage Filters** dialog box displays, do one of the following:
   - Select a filter from the **Filters** list and then click **Save**.
   - Create a new filter. For more information, see "Creating a scenario comparisons filter" on page 87.

   The scenario comparisons worksheet appears.

Accessing a scenario comparison

A scenario comparison is the set of data that is displayed when you select a scenario comparisons filter and a scenario comparisons view.

1. Do one of the following:
   - Click **Marketing** > **Scenario Comparisons**.
   - Click **Services** > **Scenario Comparisons**.
2. To select or create a scenario comparisons filter, click .

   The **Manage Filters** dialog box appears.
3. Do one of the following:
   - Select a filter from the **Filters** list and then click **Save**.
   - Create and display a new filter. For more information, see "Creating a scenario comparisons filter" on page 87.
4. To select or create a scenario comparisons view, click .

   The **Manage Views** dialog box appears.

5. Do one of the following:
   - Select a view from the **View** list and then click **Save**.
   - Create and display a new view. For more information, see "Creating a scenario comparisons view" on page 76.

   The filter and the view combine to display the scenario comparison.

About row totals in the scenario comparisons worksheet

At the bottom of the worksheet, there is a divider line below which the row totals for the worksheet are displayed, as well as a row of totals for each of the scenarios that are displayed in the worksheet. If no rows or only one row is selected, then the **Row totals** row includes totals for all rows in the worksheet. If two or more rows are selected, then the **Row totals** row includes the totals for the selected rows only.

The totals for the scenarios are automatically updated as you select and clear items from the scenarios.

About sorting columns in the scenario comparisons worksheet

You can temporarily rearrange the columns by clicking a column header and dragging it to a different position. However, you can change the order of the columns permanently by creating a scenario comparisons view. For more information, see "About selecting the data for a scenario comparison" on page 75.

About sorting rows in the scenario comparisons worksheet

You can sort the rows in the worksheet by clicking a column header. The first time that you click a column header, the rows are sorted in ascending order according to the data in the column. The second time that you click the same header, the rows are sorted in descending order according to the data in the column. When the rows are sorted based on a column, an arrow displays beside the column header to indicate whether the sort order is ascending (up arrow) or descending (down arrow).

To sort the rows by additional columns, press and hold the **Ctrl** key while clicking additional column headers.

About adjusting column width in the scenario comparisons worksheet

You can adjust the width of the columns by dragging the line between the column headings. The column widths that you set for each scenario comparison view are saved automatically.

Selecting multiple rows in the scenario comparisons worksheet

You can select a range of rows or multiple nonconsecutive rows while working in the scenario comparisons worksheet.

To select a range of rows:

1. Select the first row in the range by clicking the row.
2. While pressing the **Shift** key, click the last row in the range.

   The range of rows is highlighted.

To select nonconsecutive rows:

1. Select the first row by clicking the row.
2. While pressing the **Ctrl** key, click the other rows.

   The selected rows are highlighted.

Locking a row in the scenario comparisons worksheet

Before you can edit configurable fields in the worksheet, you must lock the entity rows that contain the configurable fields that you want to edit. In order to lock a row, you require edit access to the entity in the row.

Note: You do not have to lock the rows to select entities for, or clear them from, scenarios in the worksheet.

1. Select the rows that contain the configurable fields that you want to edit.
2. Click .

   Check marks display in the **Edit** column for the rows that are locked.

Unlocking a row in the scenario comparisons worksheet

Locked rows are unlocked automatically when you navigate away from the worksheet or refresh the worksheet by clicking .

Warning: When you unlock rows manually, you will lose any unsaved changes in the rows.

To unlock rows manually, select the rows and then click .

About editing columns in the scenario comparisons worksheet

You can edit the columns that contain configurable fields in the scenario comparisons worksheet, provided that all of the following conditions are true:

- you have edit access to the entity that the configurable field belongs to
- you have edit access to the configurable field itself
- the configurable field is editable
- none of the funding-related columns (funding source, funding subsource, funding category or funding subcategory) are displayed in the worksheet

Before you can edit a configurable field, you must lock the row that the field is in. For more information, see "Locking a row in the scenario comparisons worksheet" on page 67.

If there are conditional values or properties set on the columns in the worksheet, the changes that you make to an affected column or locking a row that contains an affected column, could cause values to change or disappear, or cause a column to become required. You could also receive errors when saving if there are columns that are not currently displayed that have been affected by conditional properties or values.

About data errors in the scenario comparisons worksheet

Errors in the values entered into rows in the worksheet are indicated in the following ways:

- Red cell – a red cell indicates that the value cannot be saved until the error is corrected. Point to the red cell to display a tool tip with the reason for the error.

- Yellow cell – a yellow cell indicates a warning that there may be a potential problem with the value, but the value can still be saved. Point to the yellow cell to display a tool tip with the reason for the error.

  Note: If an error involves a value that is not displayed (for example, because the column is hidden), or the error does not involve a value (for example, a row cannot be locked), then the red or yellow cell is displayed in the information column.

- Error in a hidden column message – if you try to save the worksheet and there is an error in a cell that is in a hidden column, an error message appears. You must edit the scenario comparisons worksheet view to show the hidden column and then fix the error before the worksheet can be saved.

  Note: You will not be able to save any of the changes in the scenario comparisons worksheet if there is an error in any row. You must either correct all of the errors or unlock the rows that contain the errors before you can save the worksheet.

About required fields in the scenario comparisons worksheet

Required fields are denoted in the scenario comparisons worksheet with an asterisk (*) in the column heading. Two asterisks (**) in the column heading indicates that field is a shared configurable field, and that the field is required for at least one of the entities that shares it. You only have to enter a value for a shared configurable field if it is mandatory for the entity that is included in your scenario comparison.

About viewing lists in the scenario comparisons worksheet

To view the complete list of values in a list, you click the arrow or press **Enter**. You can reduce the number of values in the list by entering the first few characters of a value, which will display a list of values that start with the characters. You can also view a list of the values that contain a set of characters by entering a percent sign (%) before the characters.

For example:

- To view all of the values in a list, click the arrow or press **Enter**.
- To view the values in a list that start with “abc,” type “abc” in the cell and then click the arrow (or press **Enter**).
- To view the values in a list that contain “abc,” type “%abc” in the cell and then click the arrow (or press **Enter**).

Selecting multiple values in a list in the scenario comparisons worksheet

This procedure describes how to select multiple values in a list in the scenario comparisons worksheet.

1. Click the cell.

   The cell becomes editable.

2. To view all of the values in the list, click the arrow or press **Enter**. For more information about reducing the number of values in the list, see "About viewing lists in the scenario comparisons worksheet" on page 69.

3. To select a range of consecutive values:

   a. Click the starting value for the range.

   b. While holding the **Shift** key, click the value for the end of the range. The range of values is highlighted.

   c. Click anywhere outside the list.

4. To select multiple, nonconsecutive values:

   a. Click the first value that you want to select.

   b. While holding the **Ctrl** key, click the additional values that you want to select. Each value that you select is highlighted.

   c. Click anywhere outside the list.

   d. To view the values in the cell, click another row or cell.

   Tip: To deselect a value, click it again. If there are too many selected values to display in a cell, you can point to the cell to display a tool tip that displays the complete list.

5. To select additional values, repeat step 2 to step 4 as required, but press and hold the **Ctrl** key while selecting the first value. The values that you have previously selected are displayed at the top of the list and are highlighted.

6. To save the values, click the .

Editing multiple values in a list in the scenario comparisons worksheet

You can add additional values to, and remove values from, multiple values that have been selected from a list. The values that have been previously selected are highlighted and displayed at the top of the list.

1. Click the cell whose value you want to specify.

   The current values in the cell are highlighted.

2. Click the arrow or press **Enter**. For more information about reducing the number of values in the list, see "About viewing lists in the scenario comparisons worksheet" on page 69.

3. To add a value, press and hold the **Ctrl** key and click the value that you want to add.

4. To remove a value, press and hold the **Ctrl** key and click the value that you want to remove.

5. To remove all values, select the empty value at the top of the list.

6. When you are finished selecting values in the list, click outside of the list.

7. To view the values in the cell, click another row or cell.

8. To save the values, click .

Clearing values selected from a list in the scenario comparisons worksheet

To clear a value that has been selected from a list, select the blank row at the top of the list. If the list has too many records to display at once, you must first specify search criteria to display a smaller list of records and then select the blank row.

1. Click the cell.

   The cell becomes editable.

2. Click the arrow.

3. If the list of values displays, select the blank row at the top of the list.

4. If a message displays, advising you to refine your search criteria:

   a. Click the cell to make it editable.

b. Type the first few letters of one of the existing values, and then click the arrow. A list of the values that match your search criteria appears.

c. Select the blank row at the top of the list.

5. Click anywhere outside the list.

   The value is removed.

Using the date field in the scenario comparisons worksheet

The date format is determined by the language setting in your web browser, and therefore may be different than the dates shown in this procedure, for which the language setting is English (United States). In all cases, when entering a date, you can omit the characters that separate the date, and the first two digits of the year.

1. Click in the date field cell.
2. Type the new date using one of the following formats:
   - MM/dd/yy
   - MM/dd/yyyy
   - mmddyy
   - mmddyyyy
3. Press **Enter** or **Tab**.

   The date is changed.

Using the calendar icon in the scenario comparisons worksheet

1. Click in the date field cell.
2. Click .

   A calendar displays the month with the date from the date field highlighted, or the current month and date if there is no date in the date field.

3. To change the date to another date in the same month, select the date. The date is changed.
4. To change to the next or previous month:

a. To display the previous month, click the left arrow beside the <Month, Year>.

b. To display the following month, click the right arrow beside the <Month, Year>.

c. Repeat step a or b until the month you want is displayed.

d. Select the date. The date is changed.

5. To navigate quickly to another month and/or year:

a. Click the <Month, Year>. A table of the month names is displayed for the current year.

b. To change to another year, click the arrows beside the year.

c. Click the month that includes the date you want. A calendar of the month appears.

d. Select the date. The date is changed.

Showing and hiding what-if analysis data in the scenario comparisons worksheet

When you use the resource management worksheet or the **Resource Demand Scenarios** view to perform what-if analyses for a comparison scenario, you can update the comparison scenario with changes that you make. The changes, which are called what-if analysis data, are displayed in blue font in the same column as the original data, but are right-aligned.

The what-if data does not display in a cell while the cell is being edited.

To display the what-if analysis data while viewing a scenario comparison, click .

To hide the what-if analysis data, click .

Copying a value to multiple cells in the scenario comparisons worksheet

You can copy a value from a cell (source cell) to one or more cells (target cells) in the same column. The source cell must be in a higher row; that is, closer to the top of the worksheet, than the target cells. The value is not copied to a row if any of the following conditions exist:

- the row is not locked
- the configurable field in the cell is not editable

- the value is not available (for example, you attempt to copy a value for a field that is only available for requests to a row that contains a project)
- the value is not valid for a target cell (for example, a conditional value is not met)

1. If required, lock the rows that include the source and target cells. For more information, see "Locking a row in the scenario comparisons worksheet" on page 67.
2. Select the source and target cells.
3. Press **Ctrl+Alt+U**.

   The value from the source cell is copied to the target cells.

Saving the scenario comparisons worksheet

When you save the scenario comparisons worksheet, all of the changes that you have made to the data and the comparison scenarios (added or removed items) in the worksheet are saved.

If the worksheet cannot be saved due to one or more errors, then the cell in the information column for the affected rows displays in red. To display the reason for the error in a tool tip, point to the cell. You must correct all errors before the worksheet can be saved.

Tip: To “undo” the changes that you make to a row, you can unlock the row.

If any configurable fields in the worksheet have a formula that has been configured to be calculated when the entity is saved, and you have made changes to the columns that are included in the formula, the values will be recalculated and refreshed when the row is saved successfully.

To save the scenario comparisons worksheet, click .

About printing the scenario comparisons worksheet

You can print the scenario comparisons worksheet by clicking . This print option prints a default print area that is determined by the page size and margins and cannot be adjusted. The printout includes each row from the scenario comparisons worksheet, but only includes the columns that fit within the default margins for the printout page. To print the entire scenario comparisons worksheet, you can try the following options:

- In the **Print** dialog box, change the paper orientation to landscape to print more columns. For more information, see the online help for Microsoft Windows or the **Print** dialog box.

- Remove some of the columns from the scenario comparisons view. For more information, see "Creating a scenario comparisons view" on page 76.
- Export the scenario comparisons worksheet to Microsoft Excel and then print from Excel. For more information, see "Exporting a scenario comparison to Microsoft Excel" on page 75.

Exporting a scenario comparison to Microsoft Excel

You can export the data in the scenario comparisons worksheet to a Microsoft Excel file. All of the data in the scenario comparisons worksheet is exported exactly as it is displayed, including unsaved changes and columns that you would need to scroll to view, with the following exceptions:

- the **Edit** column is not exported
- what-if analysis data is displayed in a separate column, to the right of the original column, and includes “what-if analysis” in parentheses after the column heading

The Microsoft Excel file is named according to the format: `Export-[date-time].xls`.

1. Access the scenario comparison. For more information, see "Accessing a scenario comparison" on page 65.
2. Click .

   The **File Download** dialog box appears.
3. Do one of the following:
   - To view the Microsoft Excel file with the exported worksheet data, click **Open**. Microsoft Excel launches and displays the spreadsheet.
   - To save the Microsoft Excel file, click **Save** and then specify where you want to save the file.

About selecting the data for a scenario comparison

You select the data for a scenario comparison by creating a scenario comparisons view. In a scenario comparisons view, you specify the entity fields that you want to display as columns in the scenario comparisons worksheet. You can show or hide columns, change the order that the columns are displayed, and add columns to, and remove them from, the frozen pane. You can create, copy and save a scenario comparisons view and specify a view as your default view. If

you have the access rights, you can also share views (that you created) with other resources and edit the views created by other resources.

Creating a scenario comparisons view consists of specifying the following information:

- basic view information – you specify the view name and overall view settings
- the fiscal years and amounts to be compared in the view – you can select from the fiscal years that are configured in the system and the default scenario amounts of effort, cost, revenue and margin
- the columns to be displayed in the view – you can select from any of the standard and configurable fields for the entities as well as the configurable fields that are shared between two or more entities

For information about creating a scenario comparisons view, see "Creating a scenario comparisons view" on page 76.

About differences between entity fields and worksheet columns

Some fields are displayed or handled differently in the worksheet columns as compared to how the fields are displayed in the entity profiles and create and edit dialog boxes for the entity.

Engagement entity

In the scenario comparisons worksheet, the **Used address** field displays either the main address, billing address, or shipping address of either the company or the main contact, depending on the values that are selected for the billing address on the **Billing information** tab of the **Engagement** dialog box.

Creating a scenario comparisons view

For more information, see "About selecting the data for a scenario comparison" on page 75 and "Editing a scenario comparisons view" on page 84.

1. Access the scenario comparison.
2. Click .

   The **Manage Views** dialog box appears.
3. From the **View** list, select **New View**.
4. In the **Name** field, enter a name for the view.

5. From the **Currency** list, select the currency that the monetary amounts in the totals and fiscal period columns will be displayed in.
6. To allow other resources to use this view, select the **Share the view** check box.
7. To set this view as your default view, select the **Set as default** check box.
8. Do one of the following:
   - To specify the scenario amounts, go to "Specifying scenario amounts for a scenario comparisons view" on page 79
   - To save the view and edit another view, click **Apply**.
   - To save and display the view in the worksheet, click **Save**.

Manage Views dialog box (SCW) options

Option	Description
View list	Name of the current scenario comparisons view.
Name field	New name for the scenario comparisons view.
Currency list	All monetary amounts in the totals and fiscal period columns in the worksheet will be converted to the selected currency.
Share the view check box	When selected, allows other resources to use the scenario comparisons view.
Set as default check box	When selected, makes the current scenario comparisons view the default view for the current resource.
Include actuals check box	When selected, includes the actual amounts in the totals for the effort, cost, revenue and margin. When you include actuals, the totals for the fiscal years that have dates in the past will include all actuals amounts that occurred during those past dates. For example, if you are doing an analysis in September, but you want to see the costs for the whole year, you would select this check box to include the actuals from January to September in the totals.

Option	Description
Fiscal years list	List from which you select the fiscal periods to be included in the scenario. The order of the fiscal years in the list from top to bottom is the order that they display in the scenario comparisons view from left to right. You can change the order by dragging them to different positions.
Scenario amounts list	List from which you select the types of amounts to be included in the scenario. The order of the amounts in the list from top to bottom is the order that they display in the scenario comparisons view from left to right. You can change the order by dragging them to different positions. **Note:** When you select one or more of the amounts, the **Scenario amount** column is automatically added to the **Show/hide column** list.
Effort check box (in Scenario amounts)	When selected, includes the estimated effort amounts in the scenario.
Cost check box (in Scenario amounts)	When selected, includes the costs in the scenario.
Revenue check box (in Scenario amounts)	When selected, includes the revenue in the scenario.
Margin check box (in Scenario amounts)	When selected, includes the margins (revenue minus costs) in the scenario.
Entity type list	List from which you select an entity to display its fields in the **Show/hide columns** list.
Frozen columns list	List of columns that will remain in place even when you scroll the worksheet horizontally. The order of the columns in the list from top to bottom is the order that the columns display in the scenario worksheet from left to right.

Option	Description
Show/hide columns list	List of available columns. When the check box for a column is selected, the column displays in the scenario comparisons worksheet. The order of the columns in the list is the order that the columns display in the scenario worksheet from left to right. **Note:** • The **Scenario** check box controls whether the scenarios that are specified in the **Manage Filters** dialog box are displayed. • If you select one or more amounts from the **Scenario amounts** list, the **Scenario amounts** column in the **Show/hide columns** list is automatically selected. If you do not want fiscal amounts in your view, you can clear the amounts from the **Scenario amounts** list and then the **Scenario amounts** column in the **Show/hide columns** list. • There are some differences between entity fields and worksheet columns. For more information, see "About differences between entity fields and worksheet columns" on page 76.
Numeric Formats button	Displays the **Numeric Formats** dialog box, which provides the following options for formatting the numeric data in the scenario comparisons worksheet: • **Display units** – You can change the display units for large numbers or amounts to: **As-is**, **By thousands** or **By millions**. • **Decimal places** – You can select the number of decimal places (up to three) to be shown after the decimal point.

Specifying scenario amounts for a scenario comparisons view

For more information about the fields in this procedure, see "Editing a scenario comparisons view" on page 84.

1. Create a scenario comparisons view.
2. To include actual amounts in the selected scenario amounts for the selected fiscal years, select the **Include actuals** check box.

3. In the **Fiscal Years** list, do the following:
   - Select the check boxes for the fiscal years that you want to include.
   - To include a column that includes the totals of all fiscal years (not just the fiscal years that you selected), select the **Total** check box.
   - To change the order that the fiscal years are displayed in the view, drag the fiscal years to the appropriate position in the list.
4. In the **Scenario amounts** list, do the following:
   - Select the check boxes for the amounts that you want to include.
   - To change the order that the amounts are displayed in the view, drag them to the appropriate position in the list.
5. To specify formats for the scenario amounts, see "Specifying numeric formats for columns in a scenario comparisons view" on page 84.
6. Do one of the following:
   - To specify the columns, go to the "About specifying columns for a scenario comparisons view" section on page 80.
   - To save the view and edit another view, click **Apply**.
   - To save and display the view in the worksheet, click **Save**.

About specifying columns for a scenario comparisons view

To specify the columns for a scenario comparisons view, you first select the entity (from the **Entity type** list) that includes the fields that you want to display as columns in the scenario comparisons worksheet. You have the option of selecting from the default fields only or from both default and configurable fields for the entity. You can also select from the configurable fields that are shared by two or more entities.

When you select an entity, its fields are displayed in the **Show/hide** list. The fields that are unique to the entity (for example, the **Request number** field for the request entity) display with the entity icon in front of them. The fields that are available to multiple entities (for example, the company field) have no icons.

> **Tip:** You only have to select shared configurable fields, and default fields that are available for multiple entities for one entity because the field will be displayed as a column, and the relevant data for each entity will display in the row for that entity.

The columns that are common to all entities are always available to be selected. These columns are: **Company**, **Name**, **Entity type**, **Scenario** and **Scenario amount**. Since the request entity does not include a **Name** field, the **Request number** and **Short description** fields are mapped to the **Name** field, and the request **Details** field is mapped to the "description" field for other entities. This is also the case for shared configurable fields.

If you select the **Description** column for one entity, it will not be available for selection for any other entity. The description or comments from each entity (as determined by the scenario comparison filter) will display in the **Description** column.

The fields that you do not have view access to are grayed out in the **Show/hide** list. You can add these fields to a view, but the corresponding columns will not display in the scenario comparisons worksheet when you apply the view. However, the columns will display when a resource who has access to the fields applies the view. This behavior is intended to enable a resource to create views for other resources who do have access to the fields.

> **Note:** The maximum number of columns in a view is 100, including entity columns, scenario amount columns and comparison scenarios. The maximum number can be configured by your system administrator and therefore may be different on your system.

The columns display left to right on the worksheet in the order that they are listed from top to bottom in the **Frozen columns** and **Show/hide columns** lists. For more information about the options in this procedure, see "Editing a scenario comparisons view" on page 84.

About scenario comparisons views with funding source data

You can add funding source data, which includes funding source, funding subsource, funding category and funding subcategory columns, to a scenario comparisons view. If you add any of the funding source columns to the view, the effort, cost, revenue and margin data will be grouped per entity (project, request, opportunity), based on the lowest level of funding source data currently displayed on the view.

You can then group by funding category (for example), which may split into multiple rows of data if funding source and funding subsource were included in the view. Due to the possibility of data being split, you cannot update data when any of the funding-related columns are

displayed in the worksheet. To update the data, you must switch to a view without any funding source information displayed and therefore there is only one row of data per entity.

For example, Project A is associated to the following funding categories:

- Funding Category 1, with 500 effort hours, which are split into funding sources:
  - Funding Source 1 with 300 effort hours
  - Funding Source 2 with 200 effort hours
- Funding Category 2, with 200 planned hours

When no funding source fields are selected in the scenario comparisons view, Project A appears in one row and has 700 effort hours in fiscal year 2010.

Name	Effort hours
Project A	700

If the funding category column is added to the view, two rows will display for Project A.

Name	Funding category	Effort hours
Project A	Funding Category 1	500
Project A	Funding Category 2	200

If the funding source column is added to the view, three rows will display for Project A.

Name	Funding category	Funding source	Effort hours
Project A	Funding Category 1	Funding Source 1	300
Project A	Funding Category 1	Funding Source 2	200
Project A	Funding Category 2	Funding Source A	200

Note: When the funding source data for an entity is split across two or more rows, all other numeric data for the same entity will be repeated in each row. However, the column totals at the bottom of the worksheet will include only one numeric amount per entity, regardless of the number of rows for each entity.

Specifying columns in a scenario comparisons view

Some entity fields have different column names in the scenario comparisons worksheet. For more information, see "About differences between entity fields and worksheet columns" on page 76.

1. Create a scenario comparison view.
2. From the **Entity type** list, select the entity that includes the fields that you want to display as columns in the scenario worksheet.

   The fields display in the **Show/hide columns** list.
3. To display a column in the view, in the **Show/hide columns** list, select the column check box.
4. To remove a column from the view, clear the column check box.
5. To select or clear all of the columns at once, click the check box in the top row of the **Show/hide columns** list. The check box switches between options to select all and clear all columns.
6. To add a column to the frozen columns, select the column in the **Show/hide columns** list and then click the left arrow button (<).

   Tip: You can also select and drag columns from one list to the other.
7. To remove a column from the **Frozen columns** list, select the column in the **Frozen columns** list and then click the right arrow button (>).
8. To change the order of the columns, select a column name and drag it to the desired position in the list.
9. To remove all columns from the **Frozen columns** list, click the double right arrow button (>>).

   All columns except **Name** are moved to the **Show/hide columns** list.
10. When you are finished, do one of the following:

- To specify numeric formats for the amount columns in the view, go to the "Specifying numeric formats for columns in a scenario comparisons view" section on page 84.
- To save the view and edit another view, click **Apply**.
- To save and display the view in the worksheet, click **Save**.

Specifying numeric formats for columns in a scenario comparisons view

For each amount column in the view, you can specify whether the values are displayed in thousands or millions, and the number of decimal places (up to three) to be displayed after the decimal point. However, when you click a cell in the scenario comparisons worksheet to edit its value, the full value as it was entered will be displayed.

1. In the **Manage Views** dialog box, click **Numeric Formats**.

   The **Numeric Formats** dialog box lists all of the columns that include amounts and are included in the current view.

2. To change the display units, in the **Display units** column, select one of the options:
   - As is – displays the amount as it was entered
   - Thousands – displays the amount in thousands
   - Millions – displays the amount in millions
3. To change the number of decimal places to be displayed, in the **Decimal places** column, select a number between 0 and three.
4. When you are finished, do one of the following:
   - To save the view and edit another view, click **Apply**.
   - To save and display the view in the worksheet, click **Save**.

Editing a scenario comparisons view

You can edit the scenario comparisons views that you create. If you have the access rights, you can also edit the scenario comparisons views that were created by other resources.

1. Access the scenario comparison.
2. Click .

   The **Manage Views** dialog box appears.

3. From the **View** list, select the view that you want to edit.
4. Make the necessary changes.
5. When you are finished, do one of the following:
   - To save the view and edit another view, click **Apply**.
   - To save and display the view in the worksheet, click **Save**.

Deleting a scenario comparisons view

You can delete the scenario comparisons views that you create. If you have the access rights, you can also delete the shared scenario comparisons views that were created by other resources.

1. Access the scenario comparison.
2. Click .

   The **Manage Views** dialog box appears.
3. From the **View** list, select the view that you want to delete.
4. Click **Delete**.
5. Click **Yes** to confirm.
6. Click **OK** to confirm again.

   The default system view is selected.
7. Do one of the following:
   - To edit or delete another view, select the view.
   - To display the system view in the worksheet, click **Save**.
   - To display a different view, select the view and then click **Save**.

About selecting items for a scenario comparison

You select the items for a scenario comparison by specifying filter criteria in a scenario comparisons filter. In a scenario comparisons filter, you can specify the entities, other existing scenarios and project portfolios that you want to add to a scenario comparison.

You create a scenario comparison using the **Manage Filters** dialog box, which contains the following tabs:

- Entity tabs – for selecting entities (engagement, opportunities, projects and requests) based on values from their fields. For example, on the **Project** tab, you can create a filter to include all projects for a specific engagement.
- **Other criteria** tab – for selecting request scenarios, opportunity scenarios, resource demand scenarios, comparison scenarios, and project portfolios.
- **Shared configurable fields** tab – for selecting entities based on values from shared configurable fields

The filters that you create in the entity tabs and the **Other criteria** tab are joined by a logical OR operator to the filters created in other tabs, except for the **Shared configurable fields** tab, which is joined by a logical AND operator.

Therefore, if you create a filter on the **Project** tab (project status is equal to active) and **Request** tab (request status is equal to open), all of the active projects and all of the open requests will display in the scenario comparison.

If you create a filter in the **Project** tab (project status is equal to active) and the **Shared configurable fields** tab (project priority is equal to high), only the projects that are both active and high priority will display in the scenario comparison.

If you select items in the **Other criteria** tab (select Comparison Scenario A and Project Portfolio B) and create a filter in the **Shared configurable fields** tab (project priority is equal to high), the member items of the comparison scenario and project portfolio will display, as well as the projects that are high priority. In this case, you are specifying specific items (not filter conditions) in the **Other criteria** tab. The specific items are not subject to the filter conditions in the **Shared configurable fields** tab.

> **Note:** Keep in mind that the items that you select in the filter must be related to the columns (data fields) that are selected in the scenario comparisons view; otherwise, no data will display. For example, if the view contains only project-related columns, and you combine the view with a filter that selects only requests, all of the columns will display, but the columns that are not related to requests will be blank.

For more information, see the following sections:

- "Creating a scenario comparisons filter" on page 87

- "Adding entities to a scenario comparisons filter" on page 89
- "About adding other scenarios to a scenario comparisons filter" on page 89
- "Adding project portfolios to a scenario comparisons filter" on page 91

Creating a scenario comparisons filter

1. Access the scenario comparisons worksheet.
2. Click .
3. The **Manage Filters** dialog box appears.
4. In the **Filter** list, select **[New filter]**.
5. In the **Name** field, enter a name for the filter.
6. To apply the filter automatically to all scenario comparison views, select the **Set as default** check box.
7. Do one or more of the following:
   - To add entities, see "Adding entities to a scenario comparisons filter" on page 89
   - To add scenarios, see "About adding other scenarios to a scenario comparisons filter" on page 89
   - To add project portfolios, see "Adding project portfolios to a scenario comparisons filter" on page 91
8. When you are finished, do one of the following:
   - To save the filter and keep the **Manage Filters** dialog box open, click **Apply**.
   - To save the filter and display it in the worksheet, click **Save**.

Manage Filters dialog box (SCW) options

Option	Description
Filters list	Drop-down list from which you select a filter to manage, or **New filter** to create a new filter.
Name field	Field in which you can enter a new filter name or edit an existing filter name.
Set as default check box	When enabled, applies the currently selected filter automatically when you launch the scenario comparisons worksheet.
New criteria button	Adds a new criteria row to the table, above the row that you have selected.
Delete criteria button	Deletes the criteria row that is currently selected. Note that you cannot delete the last row.
Information column	When a cell in the column turns yellow, it indicates a warning for the row. When a cell turns red, it indicates there is an error in the row. Point to the cell to display the warning or error message.
Blank columns	Four drop-down lists from which you select operators (AND, OR) or parentheses to create complex filter criteria.
Filter on column	Drop-down list from which you select the worksheet column that the filter criteria applies to.
Condition column	Drop-down list from which you select the condition for the criteria row. The conditions change according to whether the worksheet column selected in the **Filter on** field includes text, numerical or date information. Examples are: Between, Equal to, Like, Starts with, etc. **Note:** The **Equal to** condition checks numeric values up to four decimal places. Consider using the **Greater than or equal to** condition with the whole number instead.
Value column	Field where you specify the value for the condition. The type of field changes according to whether the worksheet column selected in the **Filter on** field includes text, numerical or date information.

Adding entities to a scenario comparisons filter

For more information about scenario comparisons filters, see "About selecting items for a scenario comparison" on page 85

For more information about the options in this procedure, see "Manage Filters dialog box (SCW) options" on page 88.

Some entity fields have different column names in the scenario comparisons worksheet. For more information, see "About differences between entity fields and worksheet columns" on page 76.

1. In the **Manage Filters** dialog box, select an entity tab (**Project**, **Opportunity**, **Engagement**, or **Request**) or the **Shared configurable fields** tab.
2. In the **Filter on** column, select the field that the criteria row applies to.
3. In the **Condition** column, select the condition for the information in the field.
4. In the **Value** column, select the values that the condition must meet.
5. To add a criteria row:
   a. Click **New criteria**. A new criteria row appears.
   b. To specify the criteria, repeat step 2 to step 4.
   c. To add an AND or OR operator, or parentheses, click a blank column in the row and then select the item from the list.
6. When you are finished, do one of the following:
   - To save the filter and keep the **Manage Filters** dialog box open, click **Apply**.
   - To save the filter and display it in the worksheet, click **Save**.

About adding other scenarios to a scenario comparisons filter

You can add other scenarios to a scenario comparison. When selecting the scenarios that you want to add, you can filter the scenarios based on who they were created by and/or the date they were created on. You require view or edit access to the member items of a scenario in order to view and select the scenario.

When you add comparison scenarios, request scenarios and opportunity scenarios to a scenario comparison, they are displayed in the worksheet as comparison scenarios. You can add other items to these comparison scenarios and remove items from them. However, when you view request scenarios in **Request Screening**, only the planning requests will be displayed. Similarly, when you view opportunity scenarios in **Opportunity Screening**, only the opportunities will be displayed.

When you add resource demand scenarios to a scenario comparison, the demand items are displayed in the worksheet, but no comparison scenarios are created. You can create comparison scenarios based on the demand items, but the original resource demand scenarios are not affected. Similarly, when you add project portfolios to a scenario comparison, the projects are displayed and no comparison scenarios are created.

For more information about scenario comparisons filters, see "About selecting items for a scenario comparison" on page 85.

For more information about the options in this procedure, see "Editing a scenario comparisons view" on page 84.

Adding other scenarios to a scenario comparisons filter

1. In the **Manage Filters** dialog box, select the **Other criteria** tab.
2. In the **Entity type** section, select the check boxes of the scenarios that you want to select from.
3. To select from the scenarios that were created by a specific resource, select the resource's name in the **Created by** field.
4. To select from the scenarios that were created within a specific date range, specify the start and end dates of the date range.
5. Click **Load Items**.

   The matching scenarios display in the **Items** list.
6. To add scenarios to the scenario comparison:
   a. Select one or more scenarios in the **Items** list.
   b. Click the right arrow (>). The selected scenarios display in the **Selected items** list.
7. When you are finished, do one of the following:

- To save the filter and keep the **Manage Filters** dialog box open, click **Apply**.
- To save the filter and display it in the worksheet, click **Save**.

Adding project portfolios to a scenario comparisons filter

You can add project portfolios to a scenario comparison. To select the project portfolios that you want to add, you can filter the projects in the portfolios based on the project status.

1. In the **Manage Filters** dialog box, select the **Other criteria** tab.
2. In the **Entity type** section, select the **Project portfolios** check box.

   The **Project status** list appears.
3. To filter the project portfolios based on project status, select one or more statuses in the **Project status** list.
4. Click **Load Items**.

   The matching project portfolios display in the **Items** list.
5. To add project portfolios to the scenario comparison:
   a. Select one or more project portfolios in the **Items** list.
   b. Click the right arrow (>). The selected project portfolios display in the **Selected items** list.
6. When you are finished, do one of the following:
   - To save the filter and keep the **Manage Filters** dialog box open, click **Apply**.
   - To save the filter and display it in the worksheet, click **Save**.

Editing a scenario comparisons filter

You can edit a scenario comparisons filter at any time. You can add, remove and edit filter criteria for the entities included in the filter. You can also add and remove the other scenarios and project portfolios.

Tip: The tabs that include filter criteria are highlighted in bold font.

1. Access the scenario comparison.
2. Click .

3. The **Manage Filters** dialog box appears.
4. In the **Filter** list, select the filter that you want to edit.
5. Make the necessary changes.
6. When you are finished, do one of the following:
   - To save the filter and keep the **Manage Filters** dialog box open, click **Apply**.
   - To save the filter and display it in the worksheet, click **Save**.

Deleting a scenario comparisons filter

You can delete a scenario comparisons filter at any time, but keep in mind that you must have at least one scenario comparisons filter available in order to view data in a scenario comparison.

1. Access the scenario comparison.
2. Click .
3. The **Manage Filters** dialog box appears.
4. In the **Filter** list, select the filter that you want to delete.
5. Click **Delete**.
6. Click **Yes** to confirm.
7. Click **OK** again.
8. Do one of the following:
   - To create a new filter, complete the required fields.
   - To edit or delete another filter, select the filter and then edit or delete it.
   - To display another filter in the worksheet, select the filter and then click **Save**.

About comparison scenarios

You can create comparison scenarios, which are scenarios that are based on the current scenario comparison. You can add items to, and remove them from, the comparison scenarios to compare different combinations of the data in the current scenario comparison. You can also include comparison scenarios in other scenario comparisons.

Creating a comparison scenario

1. Access the scenario comparison.
2. Click .

   The **Create Scenario** dialog box appears.
3. Enter a name for the comparison scenario and then click **Save**.

   A column for the new comparison scenario is inserted to the right of the existing scenarios.
4. In the new comparison scenario column, select the check boxes for the rows that you want to add to the comparison scenario.
5. When you are finished, click .

   The comparison scenario is saved and is automatically added to the current scenario comparison filter.

Editing a comparison scenario

Editing a comparison scenario is limited to adding items to and removing items from the comparison scenario. You can edit any comparison scenario, including those created by other resources.

1. Access the scenario comparison.
2. In the comparison scenario column, select or clear the check boxes for the rows that you want to add to or remove from the comparison scenario.
3. When you are finished, click .

Renaming a comparison scenario

You can rename any comparison scenario, including those created by other resources.

1. In the comparison scenario column, click any cell below the header cell.
2. Click .
3. Enter a new name for the comparison scenario.
4. Click **Save**. The new name is saved.

Deleting a comparison scenario

You can delete any comparison scenario, including those created by other resources.

Note: Use this procedure only if you want to delete the comparison scenario permanently. If you want to simply remove the comparison scenario from the current scenario comparison, you must edit the scenario comparisons filter. For more information, see "Editing a scenario comparisons filter" on page 91.

1. In the comparison scenario column, click any cell below the header cell.
2. Click .
3. Click **Yes** to confirm.

About what-if analysis of comparison scenarios

You can do what-if analyses of comparison scenarios using the resource management worksheet or the **Resource Demand Scenarios** view. When you update the scenario comparison with changes from the resource management worksheet or the **Resource Demand Scenarios** view, the system recalculates the planned revenue amount and cost amounts based on the new effort distribution. If the demand items are associated with funding sources or funding subsources, the system recalculates the funding source distribution based on the updated new effort distribution as well.

About budget-based data

If your system has been configured to use project budget information when calculating revenue and cost information for scenario comparisons and funding source fiscal year totals, the effort distribution will be based on budget data. The resource management worksheet and the **Resource Demand Scenarios** view both use planned data to calculate effort distributions. If you make changes in the resource management worksheet or the **Resource Demand Scenarios** view and then update the comparison scenario, the effort totals will be changed accordingly, and the budget-based data will be redistributed based on the effort.

Prorating of what-if data

The system prorates the calculation of what-if revenue and cost amounts based on the new effort distribution, grouped by demand item and fiscal year. For example, the cost for one fiscal year is calculated as total cost * effort for this fiscal year / total effort. Margin is calculated as Revenue – Cost.

If effort is added to demand items, the total cost for that demand item is increased proportionally and is prorated for each fiscal year based on effort. For example, if the effort is 20% larger than the total in the comparison scenario, the total cost and revenue are also increased by 20%, and then the total cost and revenue are distributed to each fiscal year.

If funding source information is shown, the funding source totals are prorated based on the demand item totals in each fiscal year (original effort for this row in the fiscal year / original effort for the demand item for the fiscal year * new effort for the demand item for the fiscal year). The total cost and total revenue are prorated in the same way.

About using the RMW from a comparison scenario

You can do a what-if analysis of effort and cost by using the RMW (resource management worksheet) with the scenario comparisons worksheet. When you select a comparison scenario and launch the resource management worksheet, the current and future-dated demand items from the comparison scenario are displayed in the resource management worksheet in the fiscal periods defined for the default billing office for the comparison scenario. You can edit the demand items by changing, moving and deleting planned hours. You can then update the comparison scenario with these changes to see how the changes affect the comparison scenario. In the worksheet, you can add and remove demand items from the comparison scenario, and these changes will be reflected in the resource management worksheet the next time you launch it.

Up to this point, no data has actually been changed in the database. If you want to update the database, you can commit the changes in the resource management worksheet.

Adding and removing demand Items

If you add or remove demand items from the comparison scenario in the worksheet, the system makes the corresponding changes to the what-if analysis data. If you then relaunch the resource management worksheet, the system transfers these changes from the comparison scenario data to the resource management worksheet.

Display of what-if analysis data

The what-if analysis data in the comparison scenario displays in blue font, and includes both committed and uncommitted changes that were made in the resource management worksheet, which means that the updated effort distribution includes both committed and uncommitted effort.

If you hide the what-if analysis data in the comparison scenario, both the uncommitted changes and committed changes from the resource management worksheet are removed from display in the comparison scenario. However, the committed changes will be added back to the comparison scenario when the relevant scheduled jobs are run, which is usually overnight.

Note: When you launch the resource management worksheet from a comparison scenario, some options (for example, **Filter**, **Timescale**, **Save Scenario**, and **Delete Scenario**) are not available because the information comes from the comparison scenario.

For more information about the resource management worksheet, see "Resource Management Worksheet" in the *Resource Management User Guide*.

Using the RMW from a comparison scenario

When you use the resource management worksheet with a comparison scenario, you can only go back and forth between the worksheet and the comparison scenario. Therefore, the **Filters** field and **Scenario** fields are not available.

1. Access the scenario comparisons worksheet.
2. Select the scenario comparison view and filter.
3. Click any cell in the column of the comparison scenario (except the header) whose demand items you want to view in the resource management worksheet, and then click .

   The **Workgroups** dialog box appears. Workgroups for which you are the resource manager display in the workgroup tree.
4. Do one of the following:
   - To calculate capacity based only on the resources that are assigned to the demand items in the scenario comparison, click **OK**.
   - To add resources from selected workgroups to the capacity calculations (in addition to the assigned resources), select the workgroups from the workgroup tree. Select the **Include children** check box to include the resources in all subgroups of the selected workgroups in the capacity calculations, and then click **OK**.

   The resource management worksheet appears.
5. Make the necessary changes in the resource management worksheet.

6. To return to the scenario comparisons worksheet, click .

7. If you did not commit your changes, a message appears, asking whether you want to update the scenario comparisons. Do one of the following:

   - To update the comparison scenario with the changes that you made in the resource management worksheet, click **Yes**. The changes are displayed in the scenario comparisons worksheet as what-if data in blue.

   - To return to the **comparison scenario** without updating, click **No**.

About using resource demand scenarios from a comparison scenario

You can launch the **Resource Demand Scenarios** view from a comparison scenario, which preloads the **Resource Demand Scenarios** view with the demand items from the comparison scenario.

By default, the **Resource Demand Scenarios** view includes the capacity for the workgroups of the resources who are assigned to the demand items in the comparison scenario. However, you have the option of specifying additional workgroups whose capacity you want to include in the resource demand scenario. If you select this option, the demand items from any additional workgroups (that you specified for the capacity calculations) are also included.

Similarly, the histogram in the **Resource Demand Scenarios** view includes all of the demand items that are assigned to the selected resources by default. However, you have the option of including only the demand items from your scenario in both the Gantt and histogram of the resource demand scenario.

In the **Resource Demand Scenarios** view, you can change demand items and analyze the effects of such changes. You also have the option to move all demand effort from the past to the current period or only move demand from today forward. When you are done, you have the option of updating the comparison scenario with the changes, which are displayed as what-if analysis data in the scenario comparisons worksheet. You can also save the resource demand scenario for future reference and use in scenario comparisons.

> **Note:** A new resource demand scenario is created each time you launch resource demand scenarios from scenario comparisons.

For more information about resource demand scenarios, see "Resource Demand Analysis" in the *Resource Management User Guide*.

Using resource demand scenarios from a comparison scenario

1. Access the scenario comparisons worksheet.
2. Select the scenario comparison view and filter.
3. Click any cell in the column of the comparison scenario (except the header) whose demand items you want to view in the **Resource Demand Scenarios** view, and then click .

   The **Workgroups** dialog box appears. The workgroups for which you are the resource manager display in the workgroup tree.
4. To include capacity from the resources in additional workgroups in the resource demand scenario:
   a. Select the workgroups from the workgroup tree.
   b. To include the resources in all subgroups of the selected workgroups in the capacity calculations, select the **Include children** check box.
5. To add demand items from all resources in the workgroups (in addition to the demand items included in your scenario) to the histogram, select the **Include all demand items in the histogram** check box.
6. Click **OK**.

   The **Resource Demand Scenarios** view appears.
7. Make the necessary changes in the resource demand scenario.
8. When you are done, do one of the following:
   - To update the comparison scenario with the changes that you made, click **Actions** > **Update scenario comparison**.
   - To return to the comparison scenario without updating, click **Actions** > **Return to scenario comparison**.
9. To view the what-if analysis data, click .

Troubleshooting the scenario comparisons worksheet

Values disappear when rows are locked

In order that data in the scenario comparisons worksheet displays quickly, the conditional properties for configurable fields are not processed when the configurable fields are first displayed.

However, when you lock a row, the conditional properties are processed. Values on the worksheet may disappear because a “hidden” conditional property on configurable fields controls whether the fields display. Note that conditional properties and values for configurable fields are always respected when the worksheet is saved.

Value for a configurable field does not refresh

If you edit a configurable field that is source input for a formula field that is also present on your view, and the formula is set to be calculated when the entity is saved, the column will be refreshed with the new value after you save a new value for any input field.

Note: The calculation is refreshed only when you save the item.

You cannot edit a configurable field

In order to edit a configurable field in the scenario comparisons worksheet, all of the following conditions must exist:

- you must have edit access to the entity that the configurable field belongs to
- the field must be available for the entity
- you must have edit access to the field itself (through metadata), field security access and conditional properties that are configured for that field.
- none of the funding-related columns are displayed in the worksheet (funding source, funding subsource, funding category or funding subcategory)

Values are not displayed in cost and margin columns

You require the **View Costs** feature to view cost and margin values, even if the columns are displayed in the worksheet.

Scenarios are not displayed in the worksheet

For scenarios (that you specify in the **Manage Filters** dialog box) to display in the worksheet, you must select the **Scenario** check box in the **Show/hide columns** list in the **Manage Views** dialog box.

Calendar or drop-down list is truncated on right side of worksheet

If you are not able to select a value in a calendar or drop-down list, do one of the following to display the calendar or list fully:

- drag the column temporarily to the left
- edit the worksheet view to move the affected column to the left

Cannot save a value due to a duplicate value error, even though the pre-existing duplicate value is being edited at the same time.

If duplicate values are not permitted for a column, you must edit the pre-existing value first and save it before you can save the same value for a different row.

You cannot edit a standard field

In order to edit a standard field in the scenario comparisons worksheet, all of the following conditions must exist:

- you must have edit access to the entity that the field belongs to
- the field can be edited in the scenario comparisons worksheet
- the field must be configured in metadata to be available and editable

Project fields that cannot be edited in the scenario comparisons worksheet

- Actual finish
- Actual hours
- Actual start
- Secondary time approver delegated
- Baseline finish
- Baseline hours
- Baseline Start

- Billing office
- Created on
- Created by
- Customer
- Engagement
- Rollup forecast start
- Rollup forecast finish
- Funding category
- Funding source
- Funding subcategory
- Funding subsource
- Is a subproject
- Originating request
- Engagement currency
- Project manager
- Rollup remaining hours
- Date of last rollup
- Updated by
- Updated on
- Billing office
- Billing type
- Created by
- Created on
- Company
- Currency

- Fiscal period
- Funding category
- Funding source
- Funding subcategory
- Funding subsource
- Initial close
- Updated by
- Updated on

Engagement fields that cannot be edited in the scenario comparisons worksheet

- Billable
- Billing office
- Billing type
- Created by
- Created on
- Company
- Expense billing type
- Opportunity
- Maximum recognizable revenue
- Updated by
- Updated on

Request fields that cannot be edited in the scenario comparisons worksheet

- Created by
- Created on
- Company
- Engagement

- Funding category
- Funding source
- Funding subcategory
- Funding subsource
- Initiator
- Request billing type
- Request number
- Updated by
- Updated on

You cannot locate the “Comments” field for the project entity

In the scenario comparison worksheet, the **Comments** field for the project entity is called **Description**.

Index

B

burden rates
  service forecast 27

C

calendar
  viewing, for campaigns 14

calender icon
  using, in worksheet 72

campaign calendar
  viewing 14

campaign categories
  accessing 9
  creating 9
  editing 9

campaign costs
  adding 11
  editing 12

campaigns
  about 9
  accessing 10
  calendar, viewing 14
  cost items, adding 13
  cost items, editing 13
  costs, dialog box 12
  creating 10
  creating, dialog box 10
  editing 11
  editing, dialog box 10

candidates
  creating/viewing Gantt charts 61
  viewing, in Gantt charts 61

charts
  Gantt, creating for candidates 61

close dates
  opportunity, changing 37

comparison scenarios
  about 92
  budget-based data 94
  creating 93
  deleting 94
  editing 93
  prorating what-if data 94
  renaming 93
  what-if analysis, about 94

competitor categories
  accessing 15
  creating 15
  editing 15

competitors
  about 15
  accessing 16
  creating 16
  creating categories 15
  editing 16
  editing categories 15
  performance calculation 17
  specifying, for opportunities 26

cost items
  adding, for campaigns 13
  editing, for campaigns 13

costs
  adding, for campaigns 11
  editing, for campaigns 12

Create/Edit Opportunity dialog, Expenses tab options 36

Create/Edit Opportunity dialog, Fixed fees tab options 30

Create/Edit Opportunity dialog, Forecast tab options 29

Create/Edit Opportunity dialog, General tab options 24

Create/Edit Opportunity dialog, Outcome tab options 40

Create/Edit Opportunity dialog, Products tab options 31

Create/Edit Opportunity dialog, Services tab options 33

Create/Edit Product Category dialog box options 52

Create/Edit Product dialog, General tab options 53

E

engagements
- creating from opportunities 44
- creating from opportunities, about 44

expenses
- forecasting for opportunities 35

F

fiscal periods
- displaying in the forecast tabs 27

fixed fees
- forecasting for opportunities 29

G

Gantt charts
- opportunities 61
- opportunities, viewing in 61

L

leads
- about 19
- accessing 21
- assigning 22
- assigning sales status 20
- assigning to resource 20
- creating 21
- reassigning 22

M

Manage Filters (scenario comparisons worksheet) dialog box 88

O

opportunities
- about 23
- access, restricting 25
- accessing 23
- analyzing 57
- close dates, changing 37
- creating 23
- creating engagements from 44
- creating entities from opportunity information, about 43
- creating projects from 45
- creating projects from, about 45
- creating tasks when creating projects from, about 49
- deleting 39
- editing 37
- editing, from scenarios 60
- expenses, forecasting 35
- fiscal periods display, changing 39
- fixed fees, forecasting 29
- forecast item, associating with a funding source 38

forecast items, copying 39
forecast items, editing 38
history comments 25
outcome 40
products, forecasting 30
revenue, forecasting 28
revenue, forecasting, about 27
sales teams, adding resources 26
scenarios, accessing 58
scenarios, creating 58, 60
scenarios, deleting opportunities from 60
scenarios, editing 59
services, forecasting 32
specifying competitors 26
viewing, in Gantt charts 61

opportunity analysis
about 57

opportunity forecast
copying information to new opportunities 43

opportunity scenarios
opportunities, adding and removing 59

P

product categories
accessing 51
creating 51
deleting 52
editing 52

products
about 51
accessing 53
creating 53
deleting 56
editing 56
forecasting for opportunities 30
price, specifying 55
team members, adding 54

project portfolios
adding to scenario comparison 91

projects
creating from opportunities 45
creating from opportunities, about 45

prospects
about 19
accessing 19
changing into leads 20
creating 19
reassigning 21
unprocessed, assigning 20

R

reports
sales reports, about 62

resource demand scenarios
using with comparisons scenarios 98
using with comparisons scenarios, about 97

resource management worksheet
comparison scenarios, using 96
launching from scenario comparisons worksheet, about 95

resources
adding to opportunities 26

revenue forecasts
opportunities 27-28

S

sales reports
about 62

sales teams
opportunity, adding resources 26

scenario comparisons
accessing 65
creating 64
creating views 76
managing views, dialog box 77
resource demand scenarios 98
resource demand scenarios, about 97
selecting data 75
selecting items 85

scenario comparisons filters
adding filters 90
adding filters, about 89
adding project portfolios 91
creating 87
deleting 92
editing 91
entities 89

scenario comparisons views
amounts 79
deleting 85
editing 84
funding source data, about 81
managing, dialog box 77
specifying columns 83
specifying columns, about 80

scenario comparisons worksheet
about 63
accessing 65
adjusting columns 67
amounts, numeric formats 84
basics 64
calendar icon 72
clearing multiple values 71
copying values 73
date fields 72
displaying what-if data 73
editing columns 68
editing multiple values 71
entity fields vs. columns 76
errors 68
exporting to Microsoft Excel 75
fields, editing 63
launching the resource management worksheet, about 95
locking rows 67
printing 74
required fields 69
row totals 66
saving 74
selecting multiple columns 67
selecting multiple values 70
sorting columns 66
sorting rows 66
troubleshooting 99
unlocking rows 68
viewing lists 69

Scenario view options 58

scenarios
comparing, about 63
creating scenarios form existing scenarios 60
editing opportunities from 60
for opportunities, accessing 58
for opportunities, creating 58
for opportunities, editing 59
opportunities, deleting from 60
viewing lists, in worksheet 69
worksheet, accessing 65
worksheet, basics 64

service forecast
burden rates 27

services
about 51
forecasting for opportunities 32

T

tasks
creating from opportunities service forecast 48
creating from opportunities when creating projects, about 49

team members
adding for products 54

troubleshooting
scenario comparisons worksheet 99

V

views
for scenario comparisons 76

W

what-if analysis
of comparison scenarios, about 94

what-if data
displaying, in worksheet 73