Changepoint-Cognos Data Model Reference Guide

Changepoint PSA

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CHAPTER 1
Changepoint-Cognos Data Model

Required skills and knowledge

This documentation is intended for use by Cognos report developers. It provides information about the Changepoint-Cognos data model and about specific Changepoint functionality that has been developed for IBM Cognos reports.

To create reports using IBM Cognos, you must have the following skills and knowledge:

- ability to create reports using IBM Cognos
- knowledge of database functionality, Microsoft SQL Server, and network infrastructure
- business requirements, business logic, and processes within your organization
- familiarity with Changepoint data

This document does not explain how to create reports in IBM Cognos. For information about creating reports see the *IBM Cognos Report Studio User Guide*.

About the labels in the data model

Most of the labels of the namespaces, query subjects, and query items in the data model are mapped to a PCID in the Changepoint database, and are added to the data model using the Changepoint-Cognos Sync Utility. The labels use the standard Changepoint terminology and are available in the supported Changepoint languages.

These labels can be edited in Changepoint Administration to match the terminology that is used within your organization. For more information, contact the Changepoint system administrator.

WARNING: If you edit the labels, you must ensure that there are no duplicate labels within a query subject. Duplicate labels will cause an error when the Cognos administrator runs the Changepoint-Cognos Sync Utility to update the changes to the data model.

ID fields are not globalized, but you can add text strings and their translations for these labels to the report in IBM Cognos. For more information, refer to the *IBM Cognos Report Studio User Guide*.

About editing the data model using Cognos Framework Manager

While it is possible to use IBM Cognos Framework Manager to edit the Changepoint Cognos data model, such edits are not supported within the terms of your Changepoint support agreement. If you require assistance editing the data model, contact your account manager to arrange for chargeable consulting services. Changepoint support analysts are not able to assist you in this area.

About inter-model relationships

Each Cognos query subject references data from a single data source. However, predefined inter-model relationships allow you to combine the data from several data sources into a single report.

The inter-model relationships use full outer joins, which return all rows from all referenced tables provided that there is matching data in one of the tables. When no matching rows exist between the referenced tables, the cells in the rows are empty (NULL values).

To reduce the number of empty rows that are returned by the full outer join query, you can create a filter that excludes NULL values for a selected column in the report.

Note: The access to the data in reports is controlled by the data sources. If a user does not have access to a data source in a report that contains multiple data sources, the columns will still be displayed, but the cells will be blank.

Inter-model relationships

Budget details <–> Budget Expense by Fiscal Period

Budget details <–> Budget Fixed Fee by Fiscal Period

Budget details <–> Budget Product by Fiscal Period

Budget details <–> Budget Services by Fiscal Period

Budget details <–> Budget Revision History

Budget Expense <–> Budget Expense by Fiscal Period

Budget Fixed Fee <–> Budget Fixed Fee by Fiscal Period

Budget Product <–> Budget Product by Fiscal Period

Budget Services <–> Budget Services by Fiscal Period

Companies <–> Budget services

Companies <–> Budget fixed fees

Companies <–> Budget products

Companies <–> Budget expenses

Companies <–> Budget details

Companies <–> Contacts

Companies <–> Engagements

Companies <–> Expenses

Companies <–> Financial analysis by company (daily, monthly, by fiscal period)

Companies <–> Financial analysis by project (daily, monthly, by fiscal period)

Companies <–> Financial analysis by task assignment (daily, monthly, by fiscal period)

Companies <–> Invoiced expenses

Companies <–> Invoiced request time

Companies <–> Invoiced time

Companies <–> Materials

Companies <–> Opportunities

Companies <–> Portfolios

Companies <–> Project time

Companies <–> Projects

Companies <–> Request demand

Companies <–> Request time

Companies <–> Requests

Companies <–> Resource demand

Companies <–> Resource demand – Calendar

Companies <–> Resource demand – Opportunities

Companies <–> Resource demand – Project teams

Companies <–> Resource demand – Projected resources

Companies <–> Resource demand – Projects

Companies <–> Resource demand – Request demand

Companies <–> Resource requests from projected resources

Companies <–> Task assignments

Companies <–> Tasks

Companies <–> Time combined

Engagements <–> Billing offices

Engagements <–> Budget services

Engagements <–> Budget fixed fees

Engagements <–> Budget products

Engagements <–> Budget expenses

Engagements <–> Budget details

Engagements <–> Engagements fixed fees

Engagements <–> Engagement products

Engagements <–> Expenses

Engagements <–> Financial analysis by company (daily, monthly, by fiscal period)

Engagements <–> Financial analysis by project (daily, monthly, by fiscal period)

Engagements <–> Financial analysis by task assignment (daily, monthly, by fiscal period)

Engagements <–> Invoiced expenses

Engagements <–> Invoiced time

Engagements <–> Invoiced request time

Engagements <–> Portfolios

Engagements <–> Project time

Engagements <–> Resource requests from projected resources

Engagements <–> Projects

Engagements <–> Request time

Engagements <–> Requests

Engagements <–> Resource demand – Projected resources

Engagements <–> Task assignments

Engagements <–> Tasks

Engagements <–> Time combined

Engagements fixed fees <–> Expenses

Engagements fixed fees <–> Project time

Engagements fixed fees <–> Request time

Engagements fixed fees <–> Time combined

Engagement products <–> Materials

Expenses <–> Invoiced expenses

Global workgroups <–> Workgroups

Non-project time <–> Non-project time workflow

Opportunities <–> Financial analysis by company (daily, monthly, by fiscal period)

Opportunities <–> Requests

Opportunity services <–> Resource demand – Opportunities

Products <–> Engagement products

Products <–> Materials

Products <–> Opportunity products

Project time <–> Invoiced time

Project time <–> Task assignments

Project time <–> Project time workflow

Projects <–> Budget services

Projects <–> Budget fixed fees

Projects <–> Budget products

Projects <–> Budget expenses

Projects <–> Budget details

Projects <–> Earned value

Projects <–> Engagement products

Projects <–> Expenses

Projects <–> Financial analysis by company (daily, monthly, by fiscal period)

Projects <–> Financial analysis by project (daily, monthly, by fiscal period)

Projects <–> Financial analysis by task assignment (daily, monthly, by fiscal period)

Projects <–> Materials

Projects <–> Portfolios

Projects <–> Resource requests from project teams

Projects <–> Project time

Projects <–> Requests

Projects <–> Resource demand – Project teams

Projects <–> Task assignments

Projects <–> Tasks

Projects <–> Time combined

Request demand <–> Resource demand – Request demand

Request time <–> Invoiced request time

Request time <–> Request time workflow

Requests <–> Portfolios

Requests <–> Invoiced request time

Requests <–> Products

Requests <–> Resource requests from project teams

Requests <–> Request demand

Requests <–> Request time

Requests <–> Time combined

Resources <–> Workgroups

Resources <–> Demand and capacity

Resources <–> Demand and capacity – Static

Resources <–> Expenses

Resources <–> Non-project time

Resources <–> Project time

Resources <–> Request time

Resources <–> Resource demand

Resources <–> Resource demand – Calendar

Resources <–> Resource demand – Opportunities

Resources <–> Resource demand – Project teams

Resources <–> Resource demand – Projected resources

Resources <–> Resource demand – Projects

Resources <–> Resource demand – Request demand

Resources <–> Task assignments

Resources <–> Time combined

Task assignments <–> Earned value

Task assignments <–> Financial analysis by task assignment (daily, monthly, by fiscal period)

Task assignments <–> Resource requests from task assignments

Task assignments <–> Time combined

Tasks <–> Budget services

Tasks <–> Earned value

Tasks <–> Engagement fixed fees

Tasks <–> Expenses

Tasks <–> Financial analysis by task assignment (daily, monthly, by fiscal period)

Tasks <–> Invoiced time

Tasks <–> Project time

Tasks <–> Resource requests from task assignments

Tasks <–> Projects

Tasks <–> Task assignments

Tasks <–> Time combined

About displaying Cognos reports in different languages

You can specify a default language for your Cognos report or let users select their own language to view the report. If you do not specify a language in the report properties, users can select the language in their preferences in IBM Cognos Connection.

If a language that is not supported by Changepoint is selected, the column names are displayed in the report instead of the column labels (for example **PMWorkgroup** instead of **Project manager workgroup**).

To display other text strings on the report, such as the report title or description, in the specified languages, you must create language variables for the report, and then add the translations for the strings. For more information, see the *IBM Cognos Report Studio User Guide*.

About publishing an unsecured Changepoint-Cognos data model

About publishing an unsecured Changepoint-Cognos data model

You can create a Changepoint-Cognos data model that is not bound to normal access restrictions within by publishing an unsecured version of the latest data model. The unsecured model is published to a data package called **ChangepointUnsecured** by default.

The reports that use the **ChangepointUnsecured** package include all of the data that complies with the report criteria, regardless of whether the resource who creates or generates the report has access to the data. In contrast, the access to profile pages in from links in reports still requires that the resource has security access to the data.

Note: You can publish an unsecured data model of the latest data model only. Each time you create a revision of the data model (for example, to add configurable fields to the model), you must also publish the unsecured model to keep them both in sync.

The basic steps for creating an unsecured data model are:

1. Publishing an unsecured version of the Changepoint-Cognos data model.
2. Restricting access to the resulting **ChangepointUnsecured** package.

Publishing an unsecured Changepoint-Cognos data model

1. Sign into the Changepoint-Cognos Sync Utility.
2. In the **Changepoint-Cognos Sync Utility** dialog box, double-click the latest revision.
3. In the **Model Detail** dialog box, click **Publish unsecured model**.

   The unsecured model is published to the a package with the default name of **ChangepointUnsecure**d.

Restricting access to the ChangepointUnsecured package

To limit the access that resources have to the **ChangepointUnsecured** package, you can create a role in and then restrict access to the package in Cognos Connection to the group that is mapped to the role.

Note: You can similarly restrict access to the package based on a role that is mapped to a feature. Keep in mind however that some features map to multiple roles. For more information, see the “About roles and feature mapping between Cognos and Changepoint” section in the *Changepoint Installation Guide*.

To restrict access to a ChangepointUnsecured package using a Changepoint role

1. In Changepoint Administration:
   a. Create a role, but do not map it to any security features.
   b. Assign the role to the resources who require access to the **ChangepointUnsecured** package for creating reports.

   Tip: To ensure that the role is immediately visible in Cognos Connection, assign the role to yourself, at least temporarily, then access connection.

   ---

2. In Cognos Connection:
   a. Remove access to all the Report Studio capabilities from the **Everyone** group.
   b. Set up access to all the Report Studio capabilities for the group that corresponds to the role that you created.
   c. Select the **Delete the capabilities of all child entries** check box at the bottom of the view.

   For more information, see “Set Up Object Capabilities for a Package” in the Cognos Connection online help or the *IBM Cognos Business Intelligence Administration and Security Guide*.

To change the default name of the ChangepointUnsecured package

1. Open the following file in an editor:

```
&lt;cp_common&gt;\Cognos Client Tools\CognosClientTools.exe.config
```

2. Change the value of the "Cognos.UnsecuredPackage" parameter to the desired default name for the package.

Restricting access to the reports in the ChangepointUnsecured package

1. In Changepoint:
   a. Create a Changepoint role. You can use the same role that was created to restrict access in Report Studio to the package.
   b. Assign the role to the resource who require access to the reports in the **ChangepointUnsecured** package. You can temporarily assign the role to yourself to ensure it appears immediately in Cognos Connection.
2. In Cognos Connection:
   a. Edit the properties for the **ChangepointUnsecured** package.
   b. On the Permissions tab, remove all existing entries.
   c. Add the Cognos group that corresponds to the role you wish to have access to reports in the package.
   d. Select the **Delete the capabilities of all child entries** check box at the bottom of the view.
3. To set up access for different folders in the **ChangepointUnsecured** package to different sets of users, you can create multiple roles and set permissions on the individual folders or reports. Ensure that you grant “traverse” access to the package and any higher-level folders to the role.

Tips for using the ChangepointUnsecured package

You use the **ChangepointUnsecured** package the same way as any other package in Cognos. For more information about using packages, see the product documentation.

Changing a report to the unsecured package:

1. In Report Studio, open the report and select **File** > **Report Package**.
2. Select the **ChangepointUnsecured** package.
3. Save the report.

Tip: You can create a copy of a report, and then change the copy to use the **ChangepointUnsecured** package.

If you are using ‘copy report from clipboard’, double-check which package the report is using. It will use the package from the source report, which may not be the intended package.

You can also change the package in Cognos Connection, Report properties.

Best practices

Save reports into folders under their respective packages (**Changepoint** or **ChangepointUnsecured**) so that they can be easily distinguished and secured.

Deleted records are not filtered

Deleted records are not automatically filtered out of the **ChangepointUnsecured** package. Most query subjects have a deleted flag that you can add to reports to filter out deleted data. The exceptions are global workgroups and materials. To filter out deleted data in query subjects that do not have a deleted flag, add a small SQL query and join it to the query subject.

Cognos infers data relationships based on predefined inter-model relationships

In some cases, Cognos infers a data relationship between two query subjects by using the predefined inter-model relationships and determines its own path for joining the two, which might provide unexpected results and can make queries inefficient.

For example, for `Task` and `Request` query subjects, Cognos uses the relationship between `Task` and `Time Combined`, and `Request` and `Time Combined` to infer a relationship between `Task` and `Request`. The common expectation would be it would use a direct relationship between `Task` and `Request`.

In the Changepoint-Cognos data model, the access checking that is included in query subjects is sometimes used by Cognos to infer data relationships. However, because the unsecured data model does not include that access checking, some relationships cannot be inferred, which might cause errors in reports that do not have errors when using the Changepoint package. Therefore it may be necessary to include more fields or filters in the queries to allow Cognos to determine a relationship in the unsecured model.

Some examples from the accelerator reports package:

There are cascading prompts for customer, engagement and project in the following reports:

1. Actual vs planned Recognition billing effort and cost amounts by project
2. Actual vs planned Recognition effort cost and margin amounts summary by project

The solution was to do the following:

1. Create a separate query using the Project query subject for each of the customer, engagement and project prompts.
2. Use the queries in the respective ‘Customer’, ‘Engagement’ and ‘Project’ prompts on the prompt page.
3. For the project query, add the filters (the same filters and parameters that are in the main query used in the report tables):

   ```
   ‘[|CustomerId] in ?Customer?’
   ‘[|AssociatedEngagementId] in ?Engagement?’.
   ```

Cascading prompts for Project/Budget Revision number in the following reports:

- Budget revision comparison by fiscal period
- Budget vs Actual by fiscal period

The solution was to create separate queries using the budget details query subject for each of the project and revision number prompts.

Use the queries in the respective prompts on the prompt page.

For the revision number query, add the filter (the same filter and parameter that is in the main query used in the report tables):

```
'[|ProjectId] = ?Project?'
```

About filtering Cognos reports by entity IDs

After Cognos reports have been synchronized in Changepoint Administration, the Changepoint system administrator can integrate the reports in entity profiles in Changepoint.

To filter the report so that only the data that is specific to an entity appears in the report, you must create a prompt parameter called “EntityId” for the report. The prompt name is “EntityId” for all entities and is case-sensitive. For example:

```
[Time].[Project Time].[ProjectId] = ?EntityId?
```

You can change the “display” value for the prompt to the entity name (for example, “Project name”). However, do not change the “use” value (for example, “projectid”), which is required as a prompt for users to select a specific entity name when running the report from a location other than the entity profile page.

Note: Workspaces cannot be integrated into entity profiles in Changepoint.

Creating the EntityId prompt parameter

You can create various types of prompt parameters in IBM Cognos. This procedure uses the **Select & Search Prompt** parameter. For more information about creating prompts, see the *IBM Cognos Report Studio User Guide*.

1. Create a new report.
2. Expand the appropriate namespace and query subject, and drag the fields to the report page.
3. Point to the **Page Explorer** button and select **Prompt Pages**.
4. Click the **Toolbox** tab and drag the **Page** object to the page.
5. In the **Prompt Pages** list, double-click the **Prompt Page** link.
6. In the **Toolbox** tab, double-click **Select & Search Prompt**.

   The **Prompt Wizard** dialog box appears.
7. Create a new parameter called “EntityId” and click **Next**.
8. In the **Create Filter** window, do the following:
   a. Select the **Create parameterized filter** check box.
   b. Click the ellipsis button next to the **Package item** field.
   c. Locate, and then select the package item that will be used to filter the report, for example, “ProjectId”.
   d. Click **OK**.
   e. In the **Operator** field, select the “=” operator.
   f. In the **Parameter** field, select “EntityId”.
   g. Click **Next**.
9. In the **Populate Control** window, do the following:
   a. In the **Name** field, enter the name of the query.
   b. Click the ellipsis button next to the **Values to use** field and select the query item that will be used to filter the report. For example, select **ProjectId** in the **Projects** query subject.
   c. Click the ellipsis button next to the **Values to display** field and select the value that will be displayed to users. For example, select **Project name** in the **Projects** query subject.
   d. Click **Finish**.

      The filter outline appears on the page.
10. To test the filter:
    a. Run the report.
    b. In the **Keywords** field, enter the first letters of a project name, and then click **Search**.
    c. In the **Choice** list, select the project whose data you want to view in the report.

d. Click **Finish**.

About displaying amounts in different currencies in Cognos reports

By default, Cognos reports display monetary amounts in the original currency that was specified for the records in Changepoint. You can set up reports that display monetary amounts in different currencies. Depending on the report configuration, users can do the following:

- view monetary amounts converted into the currencies that have been specified by the report creator
- view monetary amounts converted into the current user's base currency
- view the exchange rate of a currency on a specified date
- select one or several currencies to view in the report

By default, the exchange rate that is in effect on the record date is used. However, you can set up the report to allow users who run the report to select a different date for the exchange rate.

The exchange rate query subjects in the model display all the exchange rates that are listed in the **Financial Management** > **Currencies** section in Changepoint Administration, regardless of whether the currencies have been enabled for use in Changepoint.

Note: Currencies are converted only if the exchange rates are available. The triangulation method of converting currencies is not supported.

You can set up currency conversion for the following models. The tables list the currency field and the exchange rate date to which the currency conversion applies, and the corresponding exchange rate submodel for each model.

Currency field	Exchange rate date	Exchange rate submodel
Budget details		
Currency code	Revision date	Budget details exchange rates
Budget expenses		
Currency code	Expense date	Budget expenses exchange rates
Budget fixed fees		
Currency code	Fixed fee date	Budget fixed fees exchange rates
Budget products		
Currency code	Product date	Budget product exchange rates
Budget services		
Billing office currency code	Service start date	Budget services exchange rates for billing rates

Currency field	Exchange rate date	Exchange rate submodel
Cost currency code for billing role-based cost rates	Service start date	Budget services exchange rates for billing role-based cost rates
Cost currency code for resource-based cost rates	Service start date	Budget services exchange rates for resource-based cost rates
Earned value		
Currency	Current date	Exchange rates
Engagements		
Billing currency	Created on	Engagement exchange rates
Engagement fixed fees		
Billing currency	Billing date	Engagement fixed fees exchange rates

Currency field	Exchange rate date	Exchange rate submodel
Engagement products		
Billing currency code	Billing date	Engagement product exchange rates
Expenses		
Expense currency	Expense date	Exchange rates
Financial analysis by customer, by fiscal period		
Currency code	Date (invoice date)	Financial analysis by customer, by fiscal period – Exchange rates
Financial analysis by customer, monthly		
Currency code	Date (invoice date)	Financial analysis by customer, monthly – Exchange rates
Financial analysis by project, by fiscal period		
Currency code	Date (invoice date)	Financial analysis by project, by fiscal period – Exchange rates
Financial analysis by project, monthly		
Currency code	Date (invoice date)	Financial analysis by project, monthly – Exchange rates
Financial analysis by task assignment, by fiscal period		
Currency code	Date (invoice date)	Financial analysis by task assignment, by fiscal period – Exchange rates
Financial analysis by task assignment, monthly		
Currency code	Date (invoice date)	Financial analysis by task assignment, monthly – Exchange rates
Invoiced expenses		
Engagement currency	Invoice date	Exchange rates
Invoiced request time		
Invoice currency	Invoice date	Exchange rates
Invoiced time		
Invoice currency	Invoice date	Exchange rates
Materials		
Negotiated cost currency	Material date	Exchange rates

Currency field	Exchange rate date	Exchange rate submodel
Opportunities		
Opportunity currency	Created on	Opportunity exchange rates
Opportunity expenses		
Opportunity currency from Opportunities model	Expense date	Opportunity expenses exchange rates
Opportunity fixed fees		
Opportunity currency from Opportunities model	Fixed fee date	Opportunity fixed fee exchange rates
Opportunity products		
Opportunity currency	Date	Opportunity product exchange rates
Opportunity services		
Billing office currency	Start date	Opportunity services billing office billing currency exchange rates
Opportunity currency	Start date	Opportunity services exchange rates
Products		
Currency	Created on	Exchange rates
Projects		
Project currency	Created on	Exchange rates
Project time billing		
Regular billing rate currency	Time entry date	Project time exchange rates
Project time cost		
Cost currency	Time entry date	Project time exchange rates
Cost rate currency (resource)	Time entry date	Project time exchange rates
Cost rate currency (billing role)	Time entry date	Project time exchange rates
Overtime cost rate currency	Time entry date	Project time exchange rates
Project portfolios		
Portfolio currency	Created on	Exchange rates
Requests		
Engagement currency	Created on	Exchange rates

Currency field	Exchange rate date	Exchange rate submodel
Request time billing		
Regular billing rate currency	Start time	Request time exchange rates
Request time cost		
Regular cost rate currency	Start time	Request time exchange rates
Overtime cost rate currency	Start time	Request time exchange rates
Cost rate currency (resource)	Start time	Request time exchange rates
Cost rate currency (billing role)	Start time	Request time exchange rates

Converting currencies in a report

To convert currencies in a Cognos report, you must add the amount and exchange rate query items to your report and then create a query calculation that converts the amount from the source currency to the target currency. The converted amounts are displayed in a separate column on the report.

This procedure uses the example of converting contract amounts from US dollars (the currency of the engagement), into euros.

1. Create a new report.
2. Expand the **Engagements** namespace and **Engagement** query subject, and drag the **Engagement name** and **Contract amount** fields to the report page.
3. Expand the **Engagement exchange rate** query item, select the target currency and drag it to the report.
4. Point to the **Query Explorer** button and click the query.
5. Click the **Toolbox** tab and drag the **Query Calculation** object to the query.
6. In the **Create Calculation** dialog box, enter the name of the calculation (for example “Contract amount in EUR”) and click **OK**.
7. In the **Data Item Expression** dialog box, do the following:
   a. Select the **Data Items** tab.
   b. Double-click the **Contract amount** query item to add it to the expression.
   c. Type an asterisk (*) in the expression.
   d. Double-click the exchange rate query item to add it to the expression.

   The expression is: `[ContractAmount]*[EUR]`
8. Click **Validate**.
9. Click **OK**.

   The calculation is added as a new query item to the data item list.
10. Add the new query item to your report.

Adding currency conversion into the user's base currency to a report

This procedure uses the example of converting contract amounts from US dollars (the currency of the engagement), into the base currency of the user who runs the report.

To add currency conversion into the user's base currency

1. Create a new report.
2. Expand the **Engagements** namespace and **Engagement** query subject, and drag the **Engagement** query name and **Contract amount** fields to the report page.
3. Point to the **Query Explorer** button and click the query.
4. Click the **Toolbox** tab and drag the **Query Calculation** object to the query.
5. In the **Create Calculation** dialog box, enter the name of the calculation (for example “Contract amount - User’s base currency”) and click **OK**.
6. In the **Data Item Expression** dialog box, enter the following formula:

   ```
   [Contract amount] * #‘[|Engagements].[|EngagementExchangeRates].
   [|‘+$account.parameters.BaseCurrency+’]’#
   ```
7. Click **Validate**.
8. Click **OK**.
9. Add the new query item to your report.

To display the user's base currency on a report

1. Open the report that has the currency conversion into the user's base currency.
2. Point to the **Query Explorer** button and click the query.
3. Click the **Toolbox** tab and drag the **Query Calculation** object to the query.
4. In the **Create Calculation** dialog box, enter the name of the calculation (for example “User's base currency”) and click **OK**.
5. In the **Data Item Expression** dialog box, enter the following formula:

   ```
   ‘Contract Amount’+#sq($account.parameters.BaseCurrency)#
   ```
6. Click **Validate**.
7. Click **OK**.
8. Add the new query item to your report.
9. Click the column heading of the query item.
10. In the **Properties** pane, under **Text Source**, do the following:
    a. Change the source type to **Data Item Value**.
    b. In the **Data Item Value** field, select “User's base currency”.

About adding a prompt for a currency to reports

You can configure Cognos reports to display a prompt page from which users select one or more target currencies to be displayed in the report.

You can create query calculations to display the monetary amounts converted into the selected currency, or display the exchange rate of the selected currency.

If you create a prompt page for the currency selection, the exchange rate that is in effect on the record date is used by default in the report. However, you can also add a date prompt, which is displayed as a calendar on the prompt page.

Note: For performance reasons, reports that use the financial analysis by fiscal period and monthly query subjects, will always prompt users for a currency date, even if no conversions have been done for the report. You can instruct users to ignore the prompt, or you can configure the report to use currency conversion.

Adding a prompt for a currency in a report

The following procedure uses a query calculation example for contract amounts:

```
#'[|Engagements].[|EngagementExchangeRates].
[|'+prompt('paramCurrency','token','USD')+']'# * [Contract amount]
```

If the user does not select a currency, the report displays amounts in US dollars by default.

To convert the amount to the selected currency

1. Create a report layout that contains amount and currency items.
2. Click the **Toolbox** tab and drag the **Query Calculation** object to the report object.
3. In the **Create Calculation** dialog box, enter the name of the calculation (for example "Exchange rates") and click **OK**.

   The **Data Item Expression** dialog box appears.
4. In the **Expression Definition** area, enter the following formula:

   ```
   #'[|Engagements].[|EngagementExchangeRates].
   [|'+prompt('paramCurrency','token','USD')+']'# * [Contract amount]
   ```
5. In the menu bar, click **View** > **Prompt Pages**.
6. From the **Toolbox** pane, drag the **Page** object onto the middle **Prompt Pages** pane.
7. Double-click the **Prompt Page** object.
8. From the **Toolbox** pane, drag the **Value Prompt** object onto the prompt page.

   The **Prompt Wizard** dialog box appears.
9. In the **Choose Parameter** view, select the **Use existing parameter** option and then select **paramCurrency** in the drop-down list.
10. Click **Next**.
11. In the **Populate Control** view, do the following:
    a. Make sure the **Create a new query** check box is selected.
    b. In the **Name** field, enter a name for the query, if required.
    c. Click the ellipsis next to the **Values to use** field, expand the **Currency Lookups** query subject and select **Currency code**.
    d. Click the ellipsis next to the **Values to display**, expand the **Currency Lookups** query subject and select **Currency code and name** or one of the other variations (which display the currency code, the currency name or a combination of the two, in various formats).
12. Click **Finish**.

To convert the amounts to multiple selected currencies

1. Use the previous procedure to add two (or more) currency items to your report layout.
2. Create a query calculation for each currency item, using a different parameter name for the currency selection. For example:

   Query calculation for the first currency:

   ```
   #'[|Engagements].[|EngagementExchangeRates].
   [|'+prompt('paramCurrency','token','USD')+']'# * [Contract amount]
   ```

   Query calculation for the second currency:

   ```
   #'[|Engagements].[|EngagementExchangeRates].
   [|'+prompt('paramCurrency2','token','USD')+']'# * [Contract
   amount]
   ```

To display the selected currency in the ExchangeRates column heading

You can set the properties of the **ExchangeRates** column to display the currency that is selected by the user who runs the report.

1. Click the **ExchangeRates** column heading in the report.
2. In the **Properties** list, under **Text Source**, do the following:
   a. In the **Source Type** drop-down list, select **Report Expression**.
   b. In the **Report Expression** field, click the ellipsis.
   c. In the **Expression Definition** area of the **Report Expression** dialog box, enter the following: `ParamDisplayValue(‘paramCurrency’)`
   d. Click **OK**.
3. Run the report.

To display the exchange rate of the selected currency

To display the exchange rate of the selected currency in the report instead of the converted amount, follow the procedure in “Adding a prompt for a currency in a report” on page 23 with the following exceptions:

- For step 4, in the **Expression Definition** area, enter the following formula:

  ```
  #'[|Engagements].[|EngagementExchangeRates].
  [|'+prompt('paramCurrency2','token')+']'#
  ```

- For step 9, In the **Choose Parameter** view, select the **Use existing parameter** option and then select `paramCurrency2` in the drop-down list.

Adding a prompt for a date for an exchange rate in a report

1. Repeat step 1 to step 7 of the “Adding a prompt for a currency in a report” section on page 23.
2. From the **Toolbox** pane, drag the **Date Prompt** object to the prompt page.

   The **Prompt Wizard** dialog box appears.
3. In the **Choose Parameter** view, select the **Use existing parameter** option and then select the exchange rate date in the drop-down list (for example: EngagementBillingCurrencyExchangeRateDate).

4. Click **Finish**.

Tip: Add text above the prompt that instructs users to specify a date for the currency conversion. Users can leave the selected effective date as is or clear the check box beside the date control and select another date.

About adding links to Changepoint entities to Cognos reports

The **ProfileLink** query item allows you to add links to Changepoint entity profiles to Cognos reports. HTML items appear only when users run the report in HTML format. **ProfileLink** query items have been added to the model for the following query subjects:

- Contacts
- Companies
- Engagements
- Global workgroups
- Invoices
- Opportunities
- Portfolios
- Products
- Projects
- Requests
- Resources
- Tasks
- Workgroups

Adding a profile link to a report

1. Create a report layout.
2. Drag the **ProfileLink** query item to your query.
3. Click the **Toolbox** tab and drag the **HTML Item** object to the report page.
4. Select the **HTML Item** rows.
5. In the **Properties** list, under **Text Source**, do the following:
   a. In the **Source Type** drop-down list, select **Data Item Value**.
   b. In the **Data Item Value** drop-down list, select **ProfileLink**.
6. Run the report.

Best practices

Joining data from two or more subject queries

If you select fields from two or more query subjects, Cognos uses the explicit relationships listed in the “About inter-model relationships” section on page 8 to determine the implicit relationship join path between the query subjects. However, the implicit relationship may not

provide expected results, because Cognos cannot always determine a direct relationship between two query subjects. For example:

- To determine the relationship between **Tasks** and **Requests** query subjects, Cognos uses the explicit relationships between **Tasks** and **Combined time** and between **Requests** and **Combined time**. This results in multiple rows of unrelated data.
- To determine the relationship between **Opportunities** and **Products**, Cognos uses the explicit relationships between **Opportunities** and **Opportunity products** and between **Opportunity products** and **Products**. This results in multiple rows per opportunity, one for each opportunity product record.

Therefore, when you join data from two or more subject queries, you must do one of the following:

- Create your own join between the two query subjects in Report Studio, instead of relying on the implicit relationships determined by Cognos.
- Use data from the two query subjects, but carefully review the documented inter-model relationships, review the report results, and examine the SQL query that is generated by Cognos in Report Studio to validate the resulting report.

Rounding monetary amounts in Cognos reports

When formatting numeric columns and specifying the number of decimals, IBM Cognos uses the IEEE 754 default rounding mode known as half even. With half even rounding, numbers are rounded toward the nearest truncated value, unless both truncated values are equidistant, in which case the value ending in an even digit is chosen, as follows:

- If the digit immediately after the precision to be shown is greater than 5, the number is rounded up.
- If the digit immediately after the precision to be shown is less than 5, the number is rounded down.
- If the digit immediately after the precision is a 5, the number is rounded down when the preceding digit is even and rounded up when the preceding digit is odd.

  For example, the number 78.5 is rounded down to 78, while the number 73.5 is rounded up to 74.

To ensure that the monetary amounts match what users see in Changepoint, use the SQL “round” function in a formula, rather than using a data format in the field.

Example

Changepoint expense report

Professional Services - Expense report

Expense report number:	1054	**Workgroup:**	North American Services
Resource:	John Smith - Advanced User	**Company:**	Atlantic Software
Resource ID:	148570	**Engagement:**	New Reservation System
Office phone:	313-227-7300	**Expense approver:**	Not available
		Status:	Draft

Reimbursable expenses

Number	Date	Project	Description	Type	Quantity	Unit price	Original currency	Original currency amount	Exchange rate	USD	Tax
1	2/27/2013	Reservation System Phase 1		Mileage	113.00	0.4450	USD	50.29	1.00000000000	50.29	
2	2/27/2013	Reservation System Phase 1		Mileage	111.00	0.4450	USD	49.40	1.00000000000	49.40	

Subtotal:	99.69
Minus advance:	0.00
Total reimbursable expenses:	99.69
Return:	0.00

Cognos expense report

Expense date	Created on	Expense category	Expense type	Expense quantity	Expense unit price	Expense cost amount	Expense cost amount - Formatted only	Expense cost amount Rounded
Feb 27, 2013	Feb 27, 2013 9:52:39 AM	Automobile	Mileage	113	0.445	50.285	50.28	50.29
Feb 27, 2013	Feb 27, 2013 9:46:01 AM	Automobile	Mileage	111	0.445	49.395	49.40	49.40
Overall - Total							99.68	99.69

If you apply a simple numeric formula to the column **Expense cost amount - Formatted only**, the result does not match the data in Changepoint. In the Changepoint report, the amount is rounded up to 50.29. In the Cognos report, the amount is rounded down from 50.285 to 50.28.

To match the data in Changepoint, apply the following formula to the last column **Expense cost amount Rounded** of the Cognos report:

```
round([|Expenses].[|Expense].[|ExpenseCost],2)
```

Resource demand query subjects

This topic details the criteria for inclusion of `Resource demand` and `Resource demand all days` query subjects. Reports that use the `Resource demand` query subject display only the days that have a demand item. In contrast, reports that use the `Resource demand all days` query subject display a daily record for every demand item and every day, including nonworking days and days where there is no demand. Therefore, if you use the `Resource demand all days` query subject to create and run a report using a date range of February 17 to February 25, the report displays a record for each of the eight days within the range, regardless of whether or not there is a demand item on that day.

Resources assigned to the demand items

Must be assigned the **Planned Resources** security feature.

Must be active, that is, assigned to a workgroup.

Calendar entries

Calendar entries where the end date is greater than or equal to today's date and the 'non-working day' flag is not selected. Tasks added to calendar are not included.

'Alldays': Calendar entries where the end date is greater than or equal to today's date minus 1 year. Tasks added to calendar are not included.

Projected resources

Engagement status <> 'Closed' and <> 'Completed'.

Projected resources Finish date >= today's date ('Alldays': date is greater than or equal to today's date minus 1 year)

Task created = 0

Estimated hours > 0

Associated resource request NOT IN status ('CAN','CAI','CAR','REJ','DEL')

Project team

Engagement has project-level resource requests enabled, billing office has resource requests enabled.

Project is not completed.

Project team effort > 0 and finish date >= today's date ('Alldays': finish date >= today's date minus 1 year).

The 'demand hours' field is used, which is net of task assignments.

Associated resource request NOT IN status ('CAN','CAI','CAR','REJ','DEL').

Requests

Effort > 0 and finish date >= today's date ('Alldays': finish date >= today's date minus 1 year)

Request type is enabled for request demand

Opportunity services:

Outcome: Lost, No Decision AND Other is not selected

Effort > 0 and finish date >= today's date ('Alldays': finish date >= today's date minus 1 year)

No related engagement/initiative.

Task assignments

Associated resource request NOT IN status ('CAN','CAI','CAR','REJ','DEL')

Project not completed, task assignment not completed, task assignment 'include in resource demand' = 1

Planned finish >= today's date

'Alldays': Planned finish >= today's date minus 1 year (all assignments are included, including completed and those not marked as 'include in RD') and Associated resource request NOT IN status ('CAN','CAI','CAR','REJ','DEL')

CHAPTER 2
Billing Offices

Billing Offices

Column	Description
Active (Y/N)	Indicates if the billing office is active.
Allow resources to create billable engagements (Y/N)	Indicates if resources can create billable engagements under the billing office.
Allow resources to create material records using products that are not in engagements (Y/N)	Indicates if resources can create materials using products that are not specified on engagements under the billing office.
Allow resources to select different invoice formats from the invoice profile (Y/N)	Indicates if resources can select a different invoice formats on the invoice profile.
Allow revenue recognition to calculate negative amounts for PPC-based items (Y/N)	Indicates if the system can calculate negative revenue amounts for the **Physical Percent Complete** revenue recognition methods.
Allow soft-bookings (Y/N)	Indicates if resources can be soft-booked for engagements under the billing office.
Allow the task assignment restrictions to be overridden at engagement level (Y/N)	Indicates if resource requests are enabled for all engagements under the billing office.
Allow the task assignment restrictions to be overridden at the engagement level (Y/N)	Indicates if resource requests are enabled for all engagements under the billing office.
Audit enabled (Y/N)	Indicates if the auditing is enabled for engagements under the billing office.
Audit enabled on	Date auditing was enabled for engagements under the billing office.
Base currency	Base currency of the billing office.
Base currency code	Base currency code.

Column	Description
Billing office name	Billing office name.
Cost center	Default cost center for the billing office.
Count	Metric to perform data aggregation.
Created by	Resource who set up the billing office.
Created on	Date and time the billing office was set up.
Default invoice format	Format used for invoices created under the billing office.
Deleted (Y/N)	Indicates if the billing office has been deleted.
Description	Description of the billing office.
Display the [Force fixed fee selection] option on engagements (Y/N)	Indicates if the **Force fixed fee selection** check box is available on engagements under the billing office and selected by default when creating fixed fee engagements.
Draft invoice message	Message that displays on all draft invoices. For example, “Draft only, do not pay.”
Force the entry of the project value on the Project dialog box once a project is completed (Y/N)	Indicates if resources must specify a project value (greater than zero) in order to mark a project as completed.
Invoice approval enabled (Y/N)	Indicates if approval is enabled for all invoices.
Payment terms	Payment terms for invoices of engagement under the billing office.
Prevent multiple invoice printing (Y/N)	Indicates if batch printing is prevented for invoices
Prevent override of two-level invoice approval at engagement level (Y/N)	Prevent override of two-level invoice approval at engagement level (Y/N)
Prevent resources from adding additional items to invoices (Y/N)	Indicates if resources are prevented from including additional items on invoices.
Prevent resources from changing invoice dates (Y/N)	Indicates if resources are prevented from editing invoice dates after those invoices have been saved.
Prevent resources from changing payment due dates (Y/N)	Indicates if resources are prevented from editing payment due dates in invoices.

Column	Description
Prevent resources from desubmitting time entered for engagements (Y/N)	Indicates if resources are prevented from desubmitting time entered for engagement under the billing office.
Prevent resources from distributing invoices to GL accounts (Y/N)	Indicates if resources are prevented from distributing invoice amounts to GL accounts.
Prevent resources from entering discounted or negotiated rates for engagements (Y/N)	Indicates if resources are prevented from entering discounted or negotiated rates for engagement under the billing office and must use standard rates.
Prevent resources from entering tax adjustments on invoices (Y/N)	Indicates if resources are prevented from editing taxes on invoices.
Prevent resources from entering total adjustments on invoices (Y/N)	Indicates if resources are prevented from entering total adjustments for time, expenses, and products in invoices.
Prevent resources from transferring expenses between engagements (Y/N)	Indicates if resources are prevented from transferring or reassigning expenses from one engagement to another under the billing office.
Prevent resources from transferring time between projects (Y/N)	Indicates if resources are prevented from transferring time between projects of engagement under the billing office.
Prevent resources from transferring time between tasks on the same project (Y/N)	Indicates if resources are prevented from transferring time from one task to another within the same project.
Prevent resources from writing up amounts on invoices (Y/N)	Indicates if resources are prevented from creating write-ups for time, expenses, or products on invoices.
Resource cost rates used (Y/N)	Indicates if cost amounts use resource-base cost rates. ‘0’ indicates that resource cost rates are used. '1' indicates that billing role cost rates are used.
Resource requests and restrictions for all engagements under this billing office enabled (Y/N)	Indicates if resource requests are enabled for all engagements under the billing office.
Revenue recognition (Y/N)	Indicates if revenue recognition is enabled for the billing office.
Second-level approver	Resource designated as the second-level approver.

Column	Description
Two-level approval for write-offs enabled (Y/N)	Indicates if the second-level approval is restricted to invoices that include write-offs on billable time.
Two-level approval on contract overage enabled (Y/N)	Indicates if the second-level approval is restricted to invoices that exceed the contract amount of engagement under the billing office.
Two-level invoice approval enabled (Y/N)	Indicates if two-level approval is enabled for all invoices.
Updated by	Resource who last updated the billing office information.
Updated on	Date and time the billing office information was last updated.

CHAPTER 3
Budgets

About actual and original amounts in budget columns

There are many budget columns for actual and original versions of budget amounts:

- original amounts – if the amounts in the past were replaced with actual amounts, then the original amounts are the amounts that were in the budget before being replaced with the actual amounts.
- actual amounts – the amounts in the past fsical periods as of the last time that calculate actuals was run

Budget details

Column	Description
Billing amount for budget fixed fees	Billing amount for budget fixed fees
Billing amount for budgeted expenses	Total billing amount budgeted for expenses.
Billing amount for budgeted products	Total billing amount budgeted for products.
Billing amount for budgeted services	Total billing amount budgeted for services.
Budget billing type	Budget billing type
Budget name	Budget name.
Budget type	Type of budget (engagement budget or project budget).
Comments	Comments about the budget.
Company name	Customer of the engagement or project for which the budget was created.
Contingency	Budget contingency amount.
Cost for budgeted expenses	Total cost amount budgeted for expenses.
Cost for budgeted products	Total cost amount budgeted for products.
Cost for budgeted services	Total cost amount budgeted for services.
Created by	Resource who created the budget.
Created on	Date and time the budget was created.

Column	Description
Currency	Currency of the budget (that is, the currency of the engagement for which the budget was created).
Currency code	
Deliverable or milestone-based revenue recognition enabled (Y/N)	Indicates if revenue recognition is based on deliverables and milestones.
Enable replacement of past fiscal periods with actuals – scheduled	Enable replacement of past fiscal periods with actuals – scheduled
Engagement name	Engagement for which the budget was created.
Exchange rate date for actual values selection	Exchange rate date for actual values selection
Exchange rate date for budget values selection	Exchange rate date for budget values selection
Exchange rate reference date for actuals	Exchange rate reference date for actuals
Exchange rate reference date for budget	Exchange rate reference date for budget
Expense-based revenue recognition enabled (Y/N)	Indicates if revenue recognition is based on expenses only.
Fiscal period selection	Billing office that includes the fiscal periods
Frozen (Y/N)	Indicates if the budget has been frozen.
Include actual values only for items that have been added to the budget	Include actual values only for items that have been added to the budget
Labor multiplier	When the value is not zero, revenue recognition for time is based on the cost rate instead of the billing rate, and the percent value is used in the calculation.
Last run date	Date that the automated system update was last run to update the past fiscal periods with actual values in the budget forecast view.
Latest revision - Frozen (Y/N)	Indicates if the latest budget revision has been frozen.
Latest revision (Y/N)	Indicates if the current budget revision is the latest.
Past fiscal period information replaced with actuals (Y/N)	Indicates if the past fiscal period information has been replaced with actuals.
Project name	Project for which the budget was created.

Column	Description
Revenue recognition adjustment factor	Percent value by which the recognized revenue amount is reduced. The adjustment factor applies to time, expenses, fixed-fee deliverables, and milestones.
Revenue recognition rules enabled (Y/N)	Indicates if revenue recognition is enabled.
Revision date	Date the budget was revised.
Revision name	Name or designation of the revision.
Revision number	Number of the budget revision. For initial budgets, no revision number is specified.
Revision type	Descriptive name (for example baseline or proposal, identifying the purpose of the budget).
Time and expense-based revenue recognition enabled (Y/N)	Indicates if revenue recognition is based on both time and expenses.
Time-based revenue recognition enabled (Y/N)	Indicates if revenue recognition is based on time only.
Total actual expense billing amount	Total actual expense billing amount
Total actual expense cost amount	Total actual expense cost amount
Total actual fixed fee billing amount	Total actual fixed fee billing amount
Total actual product billing amount	Total actual product billing amount
Total actual product cost amount	Total actual product cost amount
Total actual service billing amount	Total actual service billing amount
Total actual service cost amount	Total actual service cost amount
Total actual service effort days	Total actual service effort days
Total actual Service effort hours	Total actual Service effort hours
Total budget recognition amount for expenses	Total budget recognition amount for expenses
Total budget recognition amount for time	Total budget recognition amount for time
Total cost for services (resource rates)	Total cost amount budgeted for services, based on resource rates.
Total original budget expense billing amount	Total original budget expense billing amount
Total original budget expense cost amount	Total original budget expense cost amount

Column	Description
Total original budget fixed fee billing amount	Total original budget fixed fee billing amount
Total original budget product billing amount	Total original budget product billing amount
Total original budget product item cost amount	Total original budget product item cost amount
Total original budget service billing amount	Total original budget service billing amount
Total original budget service cost amount	Total original budget service cost amount
Total original budget service hours	Total original budget service hours
Total time and expense revenue	Total revenue amount for time and expenses.
Updated by	Resource who last updated the budget information.
Updated on	Date and time the budget information was last updated.

Budget expense by fiscal period

Column	Description
Actual extended billing amount	Actual extended billing amount
Actual extended cost amount	Actual extended cost amount
Actual quantity	Actual quantity
Actual unit cost	Actual unit cost
Allow replacement of past values with actual values	Allow replacement of past values with actual values
Budget currency	Budget currency
Budget Expense by Fiscal Period	Budget Expense by Fiscal Period
Budget expense date	Budget expense date
Budget name	Budget name
Currency code	Currency code
Customer name	Customer name
Engagement name	Engagement name
Expense category	Expense category

Column	Description
Expense type	Expense type
Extended billing amount	Extended billing amount
Extended cost amount	Extended cost amount
Fiscal period	Fiscal period
Fiscal period has been replaced by actual	Fiscal period has been replaced by actual
Fiscal period start date	Fiscal period start date
Fiscal year	Fiscal year
Original budget extended billing amount	Original budget extended billing amount
Original budget extended cost amount	Original budget extended cost amount
Original budget quantity	Original budget quantity
Original budget unit cost	Original budget unit cost
Project name	Project name
Quantity	Quantity
Replaced by actual	Replaced by actual
Revision number	Revision number
Unit cost	Unit cost

Budget expenses

Column	Description
Allow replacement of past values with actual values	
Billable (Y/N)	Indicates if the expense can be invoiced to the customer.
Billing percentage	Percentage of the expense to be invoiced to the customer.
Budget expense date	Date the expense incurred.
Budget item type	Classification of budget items for reporting purposes.
Budget name	Name or designation of the budget.
Budget type	Type of budget (engagement budget or project budget).

Column	Description
Burden rate	Burden rate specified for the expense category.
Capital (Y/N)	Indicates if the expense is a capital expenditure.
Comments	Comments about the expense.
Company name	Customer of the engagement or project for which the budget was created.
Created by	Resource who created the budget.
Created on	Date and time the budget was created.
Currency	Currency of the budgeted amount (that is, the currency of the engagement).
Currency code	Code of the budgeted amount currency.
Discount (%)	Discount percentage (positive number) or markup percentage (negative number) applied to the billing amount.
Engagement name	Engagement under which the budget was created.
Exchange rate to budget currency	Exchange rate to budget currency
Expense category	Category of the expense.
Expense type	Type of expense.
Fixed fee (Y/N)	Indicates if the expense is associated to a fixed fee.
Fixed fee name	Fixed fee associated with the expense.
Frozen (Y/N)	Indicates if the budget has been frozen.
Latest revision - Frozen (Y/N)	Indicates if the latest budget revision has been frozen.
Latest revision (Y/N)	Indicates if the revision is the latest budget revision.
Linked to funding source	Linked to funding source
Project name	Project for which the budget was created.
Quantity	Number of items or units for the expense.
Revenue recognition rules used (Y/N)	
Revised-in revision number	Revision number towards which changes have been applied.

Column	Description
Revision comments	Comments about the revision.
Revision date	Date the budget was revised.
Revision name	Name or designation of the revision.
Revision number	Number of the budget revision. For initial budgets, no revision number is specified.
Revision type	Revision type.
Total actual expense billing amount	Total actual expense billing amount
Total actual expense cost amount	Total actual expense cost amount
Total original budget expense billing amount	Total original budget expense billing amount
Total original budget expense cost amount	Total original budget expense cost amount
Unit cost	Cost of each unit.
Updated by	Resource who last updated the budget information.
Updated on	Date and time the budget information was last updated.
User-selected currency	User-selected currency

Budget fixed fee by fiscal period

Column	Description
Actual billing amount	Actual billing amount
Budget fixed fee amount	Budget fixed fee amount
Budget Fixed Fee by Fiscal Period	Budget Fixed Fee by Fiscal Period
Budget fixed fee date	Budget fixed fee date
Budget fixed fee deliverable	Budget fixed fee deliverable
Budget name	Budget name
Currency	Currency
Currency code	Currency code
Customer name	Customer name
Engagement name	Engagement name

Column	Description
Fiscal period	Fiscal period
Fiscal period has been replaced by actual	Fiscal period has been replaced by actual
Fiscal period start date	Fiscal period start date
Fiscal year	Fiscal year
Fixed fee amount	Fixed fee amount
Original budget fixed fee amount	Original budget fixed fee amount
Project name	Project name
Replaced by actual	Replaced by actual
Revision number	Revision number

Budget fixed fees

Column	Description
Allow replacement of past values with actual values	Allow replacement of past values with actual values
Budget item type	Classification of budget items for reporting purposes.
Budget name	Name or designation of the budget.
Budget type	Type of budget (engagement budget or project budget).
Capital (Y/N)	Indicates if the fixed fee amount is a capital expenditure.
Comments	Comments about the fixed fee.
Company name	Customer of the engagement or project for which the budget was created.
Created by	Resource who created the budget.
Created on	Date and time the budget was created.
Currency	Currency of the budgeted amount (that is, the currency of the engagement).
Currency code	Code for the currency of the budgeted amount.
Deliverable amount	Total billing amount budgeted for the fixed-fee deliverable.

Column	Description
Deliverable name	Name of the budgeted fixed-fee deliverable.
Engagement name	Engagement under which the budget was created.
Exchange rate to budget currency	Exchange rate to budget currency
Expected Revenue Recognition amount	Expected Revenue Recognition amount
Fixed fee date	
Frozen (Y/N)	Indicates if the budget has been frozen.
Latest revision - Frozen (Y/N)	Indicates if the latest budget revision has been frozen.
Latest revision (Y/N)	Indicates if the revision is the latest budget revision.
Linked to funding source	Linked to funding source
Project name	Project for which the budget was created.
Revenue recognition method	Revenue recognition method used for fixed fees.
Revenue recognition rules used (Y/N)	
Revised-in revision number	Revision number towards which changes have been applied.
Revision comments	Comments entered by the user about the revision.
Revision date	Date the budget was revised.
Revision name	Name or designation of the revision.
Revision number	Number of the budget revision. For initial budgets, no revision number is specified.
Revision type	Descriptive name (for example baseline or proposal, identifying the purpose of the budget).
Total actual fixed fee billing amount	Total actual fixed fee billing amount
Total original budget fixed fee billing amount	Total original budget fixed fee billing amount
Updated by	Resource who last updated the budget information.
Updated on	
User-selected currency	User-selected currency

Budget product by fiscal period

Column	Description
Actual extended billing amount	Actual extended billing amount
Actual extended cost amount	Actual extended cost amount
Actual quantity	Actual quantity
Actual unit cost	Actual unit cost
Actual unit price	Actual unit price
Budget currency	Budget currency
Budget name	Budget name
Budget product date	Budget product date
Budget product name	Budget product name
Budget product quantity	Budget product quantity
Budget product unit cost	Budget product unit cost
Budget product unit price	Budget product unit price
Currency code	Currency code
Customer name	Customer name
Engagement name	Engagement name
Extended billing amount	Extended billing amount
Extended cost amount	Extended cost amount
Fiscal period	Fiscal period
Fiscal period has been replaced by actual	Fiscal period has been replaced by actual
Fiscal period start date	Fiscal period start date
Fiscal year	Fiscal year
Original budget extended billing amount	Original budget extended billing amount
Original budget extended cost amount	Original budget extended cost amount
Original budget quantity	Original budget quantity
Original budget unit cost	Original budget unit cost
Original budget unit price	Original budget unit price
Project name	Project name

Column	Description
Quantity	Quantity
Revision number	Revision number
Unit cost	Unit cost
Unit price	Unit price

Budget products

Column	Description
Allow replacement of past values with actual values	
Budget item type	Classification of budget items for reporting purposes
Budget name	Budget name
Budget name	Name or designation of the budget
Budget product date	Date that pertains to your specific requirement for the product. For example, the date the product will be invoiced to the customer.
Budget type	Type of budget (engagement budget or project budget)
Burden rate	Default burden rate percent specified for the product category
Capital (Y/N)	Indicates if the product amount is a capital expenditure
Comments	Comments about the product. If the row was copied from the engagement, the field contains the description of the product.
Company name	Company associated with the engagement or project for which the budget was created.
Created by	Resource who created the budget.
Created on	Date and time the budget was created.
Currency	Currency of the product amount.
Currency code	Code for the currency of the product amount.
Discount (%)	Discount percentage (positive number) or markup percentage (negative number) applied to the billing amount
Engagement name	Engagement name
Engagement name	Name of the engagement for which the budget was created.
Exchange rate to budget currency	

Column	Description
Expected Revenue Recognition amount	
Frozen (Y/N)	Indicates if the budget has been frozen.
Latest revision - Frozen (Y/N)	Indicates if the latest budget revision has been frozen.
Latest revision (Y/N)	Indicates if the revision is the latest budget revision.
Linked to funding source	
Product name	Product included in the budget
Project name	Project name
Project name	Project for which the budget was created
Quantity	Quantity of budgeted products
Revenue recognition method	Revenue recognition method used for products.
Revised-in revision number	Revision number towards which changes have been applied.
Revision comments	Comments entered by the user about the revision
Revision date	Date the budget was revised
Revision name	Name or designation of the revision
Revision number	Revision number
Revision number	Number of the budget revision. For initial budgets, no revision number is specified.
Revision type	Descriptive name (for example baseline or proposal, identifying the purpose of the budget)
Standard cost	
Standard price	
Total actual product billing amount	
Total actual product cost amount	
Total original budget product amount	
Total original budget product billing amount	
Unit cost	Cost per budgeted product.

Column	Description
Unit cost	Cost of the product without the burden rate applied
Unit price	Standard price for the product. If a special price was negotiated for the engagement, the field displays the negotiated amount.
Updated by	Resource who last updated the budget information.
Updated on	Date and time the budget information was last updated.
User-selected currency	

Budget revision history

Column	Description
Budget name	
Change date	
Commited	
Customer name	
Engagement name	
Project name	
Resource name	
Revision number	

Budget services

Column	Description
Ad hoc task (Y/N)	Indicates if the service is related to an ad hoc task
Allow replacement of past values with actual values	Allow replacement of past values with actual values
Billing office billing role cost rate	Billing role-based cost rate for the service, based on the billing office of the engagement for which the budget was created
Billing office billing rate	Billing rate tor the service, based on the billing office of the engagement for which the budget was created.
Billing office	Billing office of the engagement.
Billing office currency	Currency of the billing office of the engagement for which the budget was created

Column	Description
Billing office currency code	Code of the billing currency, based on the billing office of the engagement for which the budget was created
Billing office resource cost rate	Resource-based cost rate applied to the performed services, based on the billing office of the engagement for which the budget was created.
Billing role	Billing role of the resource planned for the work
Budget billing rate (billing role-based)	Billing role-based billing rate applied to the time needed to perform the work
Budget billing rate (resource-based)	Resource-based billing rate applied to the time needed to perform the work
Budget cost rate (billing role-based)	Billing role-based cost rate applied to the time needed to perform the work
Budget cost rate (resource-based)	Resource-based cost rate applied to the time needed to perform the work
Budget forecast view in use (Y/N)	Indicates if the budget forecast view is used to track budgeted effort, cost and billing/revenue amounts across fiscal periods
Budget forecast view updated (Y/N)	Indicates if the budget forecast view is up to date.
Budget item type	Classification of budget items for reporting purposes.
Budget name	Budget name.
Budget type	Type of budget (engagement budget or project budget).
Capital (Y/N)	Indicates if the service amount is a capital expenditure.
Comments	Comments about the service.
Company name	Company of the engagement or project for which the budget is created.
Cost currency code for billing role-based cost rates	Cost currency code for billing role-based cost rates.
Cost currency code for resource-based cost rates	Cost currency code for resource-based cost rates.
Cost currency for billing role-based cost rates	Cost currency for billing role-based cost rates.
Cost currency for resource-based cost rates	Cost currency for resource-based cost rates.
Created by	Resource who created the budget.

Column	Description
Created on	Date and time the budget was created.
Currency	Currency of the budgeted amount (that is, the currency of the engagement).
Currency code	Code of the currency for the budgeted amount.
Daily conversion factor	Daily conversion factor for the budget service record, used to calculate effort in FTEs and days.
Discount (%)	Discount percentage (positive number) or markup percentage (negative number) applied to the billing amount.
Exchange rate to budget currency	Exchange rate to budget currency
Fixed fee name	Fixed fee deliverable associated with the service.
Frozen (Y/N)	Indicates if the budget has been frozen.
Function name	Job function of the resource assigned to perform the work.
Engagement name	Engagement under which the budget was created.
Latest revision - Frozen (Y/N)	Indicates if the latest budget revision has been frozen.
Latest revision (Y/N)	Indicates if the revision is the latest budget revision.
Linked to funding source	Linked to funding source
Manually distributed (Y/N)	Indicates if the effort has been manually distributed across the fiscal periods in the budget forecast view.
Number of working days	Number of working days that span the period for the service. FTE effort is calculated using this number.
Project name	Project for which the budget was created.
Resource name	Resource selected to perform the work.
Revenue recognition rules used (Y/N)	
Revised-in revision number	Revision number towards which changes have been applied.
Revision comments	Comments about the revision.
Revision date	Date the budget was revised.
Revision name	Name or designation of the revision.
Revision number	Number of the budget revision. For initial budgets, no revision number is specified.

Column	Description
Revision type	Descriptive name (for example baseline or proposal, identifying the purpose of the budget).
Service effort (days)	Budget services effort in days (effort in hours divided by the daily conversion factor of the budget service).
Service effort (FTEs)	Budget services effort in FTEs, (effort in hours divided by the daily conversion factor of the service, divided by the number of working days for the budget service record).
Service effort (hours)	Budget services effort in hours.
Service end date	
Service start date	
Standard Billing role billing rate	Standard billing role-based billing rate applied to the time needed to perform the work.
Standard resource billing rate	Standard resource-based billing rate applied to the time needed to perform the work.
Task assignment copied from project (Y/N)	Indicates if the task assignment information was copied from the task defined in the project.
Task name	Task from which data was copied into the budget
Total actual service billing amount	Total actual service billing amount
Total actual service cost amount	Total actual service cost amount
Total actual service effort days	Total actual service effort days
Total actual Service effort hours	Total actual Service effort hours
Total original budget service billing amount	Total original budget service billing amount
Total original budget service cost amount	Total original budget service cost amount
Total original budget service hours	Total original budget service hours
Updated by	Resource who last updated the budget information
Updated on	Date and time the budget information was last updated
User-selected currency	User-selected currency

Budget services by fiscal period

Column	Description
Actual billing rate	Actual billing rate
Actual cost rate	Actual cost rate
Actual days	Actual days
Actual extended billing amount	Actual extended billing amount
Actual extended cost amount	Actual extended cost amount
Actual hours	Actual hours
Billing rate	Billing rate
Budget name	Budget name
Budget service billing role	Budget service billing role
Budget service date	Budget service date
Budget service effort (Days)	Budget service effort (Days)
Budget service effort (hours)	Budget service effort (hours)
Budget service unit cost	Budget service unit cost
Budget service unit price	Budget service unit price
Cost rate	Cost rate
Currency	Currency
Currency code	Currency code
Customername	Customername
Daily conversion factor	Daily conversion factor
Effort (days)	Effort (days)
Effort (FTE)	Effort (FTE)
Effort (hours)	Effort (hours)
Engagement name	Engagement name
Extended billing amount	Extended billing amount
Extended cost amount	Extended cost amount
Fiscal period	Fiscal period
Fiscal period has been replaced by actual	Fiscal period has been replaced by actual
Fiscal period start date	Fiscal period start date

Column	Description
Fiscal year	Fiscal year
Number of working days	Number of working days
Original budget billing rate	Original budget billing rate
Original budget cost rate	Original budget cost rate
Original budget effort (hours)	Original budget effort (hours)
Original budget extended billing amount	Original budget extended billing amount
Original budget extended cost amount	Original budget extended cost amount
Product name	Product name
Project name	Project name
Replaced by actual	Replaced by actual
Resource name	Resource name
Revision number	Revision number
Task name	Task name

CHAPTER 4
Companies

Companies

Column	Description
Account manager	Account manager responsible for the company.
Account type	Company's account type (Customer, Internal, Supplier, etc.).
Allow engagements (Y/N)	Indicates if engagements can be created for the company.
Alternate name	Company's alternate name.
Annual revenue	Company's annual revenue.
Billing address - City	
Billing address - Country	
Billing address - Line 1	
Billing address - LIne 2	
Billing address - Line 3	
Billing address - State/ Province	
Billing address - Work location	Work location of the billing address.
Billing address - Work location group	Work location group of the billing address.
Billing address - ZIP/ Postal code	
Calculate the report card (Y/N)	Indicates if a company report card can be created to collect and display data from Changepoint and from surveys.
Company	Name of the company.
Company ID	Company-specific ID.
Count	Metric to perform data aggregation.
Created by	Resource who created the company profile.
Created on	Date and time the company profile was created.
Currency code	

Column	Description
Customer service phone	Phone number of the customer service.
Deleted (Y/N)	Indicates if the company profile has been deleted.
Description	Company‘s description.
Employees	Number of employees in the company.
Enabled for surveys (Y/N)	Indicates if surveys can be created for the company.
Executive office phone	Phone number of the executive offices within the company.
Fax	Fax number of the company.
HR phone	Phone number of the Human Resources department within the company.
Industry type	Industry of the company.
Main address - City	
Main address - Country	
Main address - Line 1	
Main address - LIne 2	
Main address - Line 3	
Main address - State/ Province	
Main Address - Work location	Work location of the main address.
Main Address - Work location group	Work location group of the main address.
Main address - ZIP/ Postal code	
Main phone	Company's main phone number.
Marketing phone	Phone number of the Marketing department within the company.
Other phone	Additional phone number of the company.
Parent company	Name of the parent company (for instance, if the organization is a division of a major corporation).
Phrase	
Profile link	
Sales reference (Y/N)	Indicates if the company is a sales reference.
Sales region	Company’s sales region.

Column	Description
Sales representative	Sales representative responsible for the company.
Sales status	Company's account status (Customer, Prospect, Lead etc.).
Security phone	Phone number of the security service within the company.
Shipping address - City	
Shipping address - Country	
Shipping address - Line 1	
Shipping address - LIne 2	
Shipping address - Line 3	
Shipping address - State/ Province	
Shipping address - Work location	Work location of the shipping address.
Shipping address - Work location group	Work location group of the shipping address.
Shipping address - ZIP/ Postal code	
Source	Source directed the customer to your organization (a marketing event, conference, business strategy etc.).
Staffing vendor (Y/N)	Indicates if the customer is a staffing vendor.
Status	Company's current status (Active, Inactive, Unknown).
Tasks	
Tax exempt (Y/N)	Indicates if the company is exempted from paying taxes.
Tax exemption ID	Tax exemption ID of the company.
Technical support phone	Phone number of the technical support department within the company.
Telemarketer	Telemarketer who contacted the company.
Text 1	
Toll free	Company's toll free phone number.
Updated by	Resource who last updated the company profile.
Updated on	Date and time the company profile was last updated.
URL	Company's web site.

Column	Description
VAT registration number	Company's VAT registration number.
Workgroup level	

CHAPTER 5

Configurable Field History

Configurable field history tracking

Column	Description
Changed code value	
Contacted by	Created by (contact).
Created by resource	Resource who specified a value in the configurable field.
Created on	Date the value was specified in the configurable field.
Current code value	Current value in the code field. Values from multi-selection code fields are separated by semi-colons.
Current date value	Current date in the configurable field.
Current numeric value	Current numeric value in the configurable field.
Current text value	Current text value in the configurable field.
Current value	Current value in the configurable field.
Customer	Name of the customer, if the configurable field is defined for that entity.
Engagement	Name of the engagement, if the configurable field is defined for that entity.
Entity name	Changepoint entity name, (project name, task name, request number, etc.) depending on the selected entity.
Entity type	Changepoint entity type, (project, task, request, etc.) depending on the selected entity.
Expense report number	
Field name	Configurable field name.
Field number	Configurable field name label or PCID, as specified in Changepoint Administration.
Opportunity	Name of the opportunity, if the configurable field is defined for that entity.
Previous date	Value in the date field before the change.
Previous numeric value	Value in the numeric field before the change.
Previous text value	Value in the text field before the change.
Previous value	Value in the field before the change.

Column	Description
Product	Name of the product, if the configurable field is defined for that entity.
Project	Name of the project, if the configurable field is defined for that entity.
Record type	Type of change made to the field: • **Initial value** if the record displays the initial value • **Change** if a new value was selected.
Request number	Number of the request, if the configurable field is defined for that entity.
Resource	Name of the resource, if the configurable field is defined for that entity.
Task	Name of the task, if the configurable field is defined for that entity.
Task assignment	A combination of the task and resource name for the task assignment.

CHAPTER 6
Contacts

Contacts

Column	Description
Anniversary	Contact's anniversary date.
Assistant name	Contact's assistant.
Assistant phone	Phone number of the contact's assistant.
Billing address - City	
Billing address - Country	
Billing address - Line 1	
Billing address - LIne 2	
Billing address - Line 3	
Billing address - State/ Province	
Billing address - ZIP/ Postal code	
Billing work location	Contact’s work location, for billing purposes.
Billing work location group	Contact’s work location group, for billing purposes.
Birthday	Contact's birthday.
Business fax	Contact's business fax number.
Business phone	Contact's business phone number.
Business phone 2	Contact's second business phone number.
Car phone	Contact's car phone number.
Client Portal access enabled (Y/N)	Indicates if contacts can access Client Portal.
Client Portal access for general collaboration (Y/N)	Indicates if contacts can access team folders through Client Portal.

Column	Description
Client Portal access for invoice review (Y/N)	Indicates if contacts can view invoices related to their organization through Client Portal.
Client Portal access for online support (Y/N)	Indicates if contacts can create requests through Client Portal, and view requests for their organization and the knowledge base.
Client Portal access for project review (Y/N)	Indicates if contacts can review the projects of their organization through Client Portal.
Client Portal access for workflow (Y/N)	Indicates if contacts can perform a step in a workflow through Client Portal.
Client Portal access to all resource profiles (Y/N)	Indicates if contacts can access all Changepoint resource profiles through Client Portal.
Client Portal access to selected resource profiles (Y/N)	Indicates if contacts can access only specific Changepoint resource profiles through Client Portal.
Close request anytime (Y/N)	Indicates if contacts can close a request any time through Client Portal.
Code 1	Configurable code fields.
Code 2	
Code 3	
Comments	Comments about the contact.
Company name	Contact's organization.
Count	Metric to perform data aggregation.
Created by	Resource who created the contact profile.
Date activated	Date that the contact's access to Client Portal was granted.
Deleted (Y/N)	Indicates if the contact profile has been deleted.
Department	Contact's department.
Email 1	Contact's email addresses.
Email 2	
Email 3	
Expiry date	Date after which the contact's access Client Portal expires.
First name	Contact's first name.
Full name	Contact's full name.
Home fax	Contact's second home fax number.
Home phone	Contact's home phone.

Column	Description
Home phone 2	Contact’s second home phone.
Internet email address 1	
Internet email address 2	
Internet email address 3	
Job title	Contact’s job title.
Last access	Date that the contact last accessed the Client Portal.
Last name	Contact's last name.
Main address - City	
Main address - Country	
Main address - Line 1	
Main address - LIne 2	
Main address - Line 3	
Main address - State/ Province	
Main address - ZIP/ Postal code	
Main phone	Main phone number where the contact can be reached.
Main work location	Contact’s main work location.
Main work location group	Contact’s main work location group.
Manager	Name of the contact's manager.
Manager phone	Phone number of the contact's manager.
Middle name	Contact's middle name.
Mobile	Contact's mobile phone number.
Nickname	Name by which the contact prefers to be addressed.
Office	Contact's office.
Other fax	Other fax number where the contact can be reached.
Other phone	Other phone number where the contact can be reached.
Pager	Contact's pager number.
Profession	Contact's profession.
Profile link	

Column	Description
Sales reference (Y/N)	Indicates if the contact is a sales reference.
Shipping address - City	
Shipping address - Country	
Shipping address - Line 1	
Shipping address - LIne 2	
Shipping address - Line 3	
Shipping address - State/ Province	
Shipping address - ZIP/ Postal code	
Shipping work location	Contact’s shipping work location.
Shipping work location group	Contact’s shipping work location group.
Sponsor	Resource who granted the Client Portal access to the contact.
Spouse name	Contact's spouse.
Status	Contact’s Client Portal access status: Pending approval, Approval rejected, Active or Expired.
Suffix	Educational or professional designations (for instance, M.A., Prof., etc.).
Text 1	Configurable text fields.
Text 2	
Text 3	
Title	Title to address the contact (Ms., Mrs., Mr., or Miss).
Type	Contact type (main contact, support contact, accounts receivable, etc.)
Updated by	Resource who last updated the contact profile.
URL	Contact's Web site.

CHAPTER 7
Earned Value

Earned value

Column	Description
Actual cost	Actual cost on the date the scheduled job was run. At the project level, the amount includes cost of time, expenses and products for dates up to and on today's date, and including subprojects. At the task and task assignment levels, only the cost of time is included, as well as the cost of tasks from subprojects.
Budget at completion	Total budgeted cost amount, calculated according to budget settings (budget revision type and latest budget revision or latest frozen budget revision to be used for physical percent complete cost calculations). At the project level, calculations include budget services, expenses and products. At the task and task assignment levels, calculations include budget services records only.
Budgeted cost of work scheduled	Budgeted cost on the date the scheduled job was run. The calculation takes into account data from the budget profile and from the budget forecast view (if the budget forecast view is used). If the budget forecast view is used, the calculation includes service amounts from fiscal periods, with the current period costs pro-rated only up to today's date. If the budget forecast view is not used, services effort and cost are distributed evenly over working days between the start and finish dates of a task. Expenses and product amounts are only associated with one date in the budget profile. Calculation at the task and task assignment level only includes budget service records.
Currency	Earned value amounts display by default in the engagement currency.
Currency code	Currency code.
Entity name	Changepoint item (project name, task name, task name and resource name for project, task and task assignment respectively)
Entity type	Changepoint entity to which the amounts apply (project, task, or task assignment).

Column	Description
Planned at completion	Total planned cost of task assignments. The amount is calculated and summed up to the task, summary task and project levels. If the project is set to roll up planned information from subprojects to parent tasks, the project and task-level amount include planned cost from subprojects.
Planned cost of work scheduled	Planned cost on the date the scheduled job was run. If the project worksheet is used, effort from each fiscal period in the past, plus a pro-rated amount of effort for the current fiscal period representing the amount up to today's date will be included. If the project worksheet is not in use, effort is evenly distributed over the planned start and finish dates. If the project is set to roll up planned information from subprojects to parent tasks, the project and task-level amount include planned cost from subprojects and pro-rated to today's date.

CHAPTER 8
Engagements

Engagements

Column	Description
Additional contact	Additional contact on the customer-side (other than the main contact).
Additional items Invoice GL distribution account	Additional items Invoice GL distribution account
Address used	Indicates which address is used on the invoice to the customer: • 1 = company's main address • 2 = company's billing address • 3 = company's shipping address • 4 = contact's main address • 5 = contact's billing address • 6 = contact's shipping address • 0 = company's main address on an outdated record
Allow project managers to specify the billing contact (Y/N)	Indicates if the project manager can select the billing contact for a project. The billing contact address may be used in billing.
Allow project override (Y/N)	Indicates if project managers are allowed to override the Billable status.
Allow selection on tasks	Allow selection on tasks
Allow support desk override (Y/N)	Indicates if resources can change the Support desk for requests for the engagement.
Allow work code override for request time (Y/N)	Indicates if resources can select a different work code when they are entering time for requests associated to the engagement.
Allow work location override for request time (Y/N)	Indicates if resources can select a different work location when they are entering time for requests associated to the engagement.
Associated engagement	Engagement associated with, or the engagement template used to create, the engagement.
Associated workgroup	Staffing workgroup

Column	Description
Audit enabled (Y/N)	Indicates if auditing is enabled for the engagement.
Audit enabled on	Date the audit was enabled for the engagement. Audit rules only apply after this date.
Auto-update billing rates (Y/N)	Indicates if the billing rates are automatically updated in the engagement.
Auto-update cost rates (Y/N)	Indicates if the cost rates are automatically updated in the engagement.
Available for billing	Available for billing
Available to all users (Y/N)	Indicates if the engagement is available to all users.
Billable (Y/N)	Indicates if the engagement is billable.
Billing currency code	Billing currency code.
Billing office	Billing office of the engagement.
Billing type	Billing type of the engagement (daily, hourly, fixed fee, or a combination of hourly/daily and fixed fee).
Calculate tax on total amount of items	Calculate tax on total amount of items
Company	Company/customer for which the engagement was created.
Consider request time as a capital cost (Y/N)	Indicates if the time entered for requests for the engagement is designated as capital costs.
Contract amount	Contract amount, excluding taxes, specified in the engagement.
Contract end date	Contract end date specified in the engagement.
Contract limit - additional items	Contract limit - additional items
Contract limit - additional items rejection enabled	Contract limit - additional items rejection enabled
Contract limit - additional items warning enabled	Contract limit - additional items warning enabled
Contract limit - all items	Contract limit - all items
Contract limit - all items rejection enabled	Contract limit - all items rejection enabled
Contract limit - all items warning enabled	Contract limit - all items warning enabled
Contract limit - expense	Contract limit - expense

Column	Description
Contract limit - expense quantity	Contract limit - expense quantity
Contract limit - expense quantity rejection enabled	Contract limit - expense quantity rejection enabled
Contract limit - expense quantity warning enabled	Contract limit - expense quantity warning enabled
Contract limit - expense rejection enabled	Contract limit - expense rejection enabled
Contract limit - expense warning enabled	Contract limit - expense warning enabled
Contract limit - fixed fee	Contract limit - fixed fee
Contract limit - fixed fee rejection enabled	Contract limit - fixed fee rejection enabled
Contract limit - fixed fee warning enabled	Contract limit - fixed fee warning enabled
Contract limit - product	Contract limit - product
Contract limit - product quantity	Contract limit - product quantity
Contract limit - product quantity rejection enabled	Contract limit - product quantity rejection enabled
Contract limit - product quantity warning enabled	Contract limit - product quantity warning enabled
Contract limit - product rejection enabled	Contract limit - product rejection enabled
Contract limit - product warning enabled	Contract limit - product warning enabled
Contract limit - request time	Contract limit - request time
Contract limit - request time effort	Contract limit - request time effort
Contract limit - request time effort rejection enabled	Contract limit - request time effort rejection enabled
Contract limit - request time effort warning enabled	Contract limit - request time effort warning enabled
Contract limit - request time rejection enabled	Contract limit - request time rejection enabled
Contract limit - request time warning enabled	Contract limit - request time warning enabled
Contract limit - time	Contract limit - time
Contract limit - time effort	Contract limit - time effort

Column	Description
Contract limit - time effort rejection enabled	Contract limit - time effort rejection enabled
Contract limit - time effort warning enabled	Contract limit - time effort warning enabled
Contract limit - time rejection enabled	Contract limit - time rejection enabled
Contract limit - time warning enabled	Contract limit - time warning enabled
Contract number	Contract number specified in the engagement.
Contract start date	Contract start date of the engagement.
Contract status date	Contract status date of the engagement.
Contract type	Contract type. For example, a detailed estimate).
Cost center	Cost center of the engagement.
Cost center type	Cost center of the engagement manager or the billing office.
Count	Metric to perform data aggregation
Created by	Resource who created the engagement
Created on	Date the engagement was created
Default billing role	Default billing role for all resources assigned to projects and tasks of the engagement.
Default invoice description	Description that appears on all invoices.
Deleted (Y/N)	Indicates if the engagement has been deleted.
Description	Description of the engagement.
Enable batch invoicing (Y/N)	Indicates if batch invoicing has been enabled for the engagement.
Enable project time approval (Y/N)	Indicates if time approval is enabled at project level for this engagement.
Enable resource requests at project level (Y/N)	Indicates if the creation of resource requests is enabled at project level for the engagement. • 0 = the setting is enabled and users must submit requests for resources scheduled to work on tasks from the **Project team** tab on the project dialog box • 1 = the setting is disabled, and users must submit resource request at task level

Column	Description
Enable resource requests at task level (Y/N)	Indicates if the creation of resource requests is enabled at task level for the engagement. • 0 = the setting is enabled and users must submit requests for resources scheduled to work on tasks from the **Task Assignment** section on the task editing screen • 1 = the setting is disabled, and users must submit resource request at project level
Engagement category	Engagement category.
Engagement currency	Engagement currency, used for invoicing.
Engagement ID	Engagement ID.
Engagement manager	Engagement manager.
Engagement name	Engagement name.
Engagement status	Status of the engagement (Prospect, Work in Progress, Inactive, etc.)
Expense approval delegated (Y/N)	Indicates if expense approval has been delegated.
Expense approval limit	Maximum expense amount before expenses are sent to the engagement expense approver.
Expense approver	Expense approver specified in the engagement
Expense billing	Indicates how expenses under the engagement will be billed (all expenses, no expenses or a percentage of expenses).
Expense billing (%)	Percentage of expenses to be billed (if the **Percentage of expense** option has been selected for expense billing in the engagement
Expense GL account	Indicates which GL account codes will be used on expense reports of the engagement. GL account codes are set up per workgroup. The workgroup of either the engagement manager, the project manager or the resource will be used, depending on what is selected.
Expense Invoice GL distribution account	Expense Invoice GL distribution account
Force fixed fee selection (Y/N)	Indicates if users are forced to select a specific fixed fee and associate it to a task created under the engagement (if the billing type of the engagement includes the fixed-fee option).
GL credit account for time recognition	GL credit account for time spent on work, used in the revenue recognition process.

Column	Description
GL debit account for time	GL debit account for time spent on work, used in the revenue recognition process.
Group time entries by project and Resource	Group time entries by project and Resource
Internal contact	Resource from your organization who interacts with the customer for which the engagement was created.
Invoice approval delegated to	Resource the invoice approval is delegated to
Invoice email CC	Invoice email CC
Invoice email comment	Invoice email comment
Invoice email subject	Invoice email subject
Invoice email To	Invoice email To
Invoice format	Invoice format selected in the engagement
Invoice maximum enforced (Y/N)	Indicates if the maximum per invoice is enforced for the engagement. If Yes, the user cannot submit invoices for approval if the amount exceeds the specified maximum.
Invoicing instructions	Instructions specified in the engagement to the attention of the invoicer
Labor multiplier	Labor multiplier used in the revenue recognition process.
Lock desubmit time (Y/N)	Indicates if the desubmission of time has been locked to avoid that changes are made to the time records being processed during the tentative revenue recognition
Lock time and expense transfer (Y/N)	Indicates if the transfer of time and expenses has been locked to avoid that changes are made to the time and expense records being processed during the tentative revenue recognition
Main contact	Name of the decision maker for the current engagement on the company-side
Master engagement	Master engagement associated with the current engagement, if split billing is selected
Maximum per invoice	Maximum amount, excluding taxes, for each invoice generated for the engagement.
Maximum recognizable revenue	Maximum recognizable revenue amount, which defaults to the approved amount in the engagement, but can be overridden.

Column	Description
Original expense approver	Approver originally in charge of approving expenses, before the approval rights were delegated to another resource
Original secondary expense approver	Secondary approver originally in charge of approving expenses, before the approval rights were delegated to another person.
Original secondary time approver	Secondary approver originally in charge of approving time, before the approval rights were delegated to another person
Original time approver	Approver originally in charge of approving time, before the approval rights were delegated to another resource
Override task restriction (Y/N)	Indicates if task restrictions can be overridden for this engagement. If Yes, project managers can assign any resource to a task and not just the resource specified as projected resources in the engagement
Overtime percentage	Billing rate increase for overtime hours. For example: 150% means a 50% increase from the base rate for overtime ($200/hr. will be $300/hr.) will be invoiced to the customer
Payment terms	Payment terms specified in engagement
Prevent tax changes on invoice (Y/N)	Indicates if the user creating the invoice can make changes to the tax amounts
Product ready to invoice	Product ready to invoice
Profile link	
Project time Invoice GL distribution account	Project time Invoice GL distribution account
Related opportunity	Opportunity from which the engagement was created (if any)
Related request number	Number of the request from which the engagement was created (if any)
Request product Invoice GL distribution account	Request product Invoice GL distribution account
Request time Invoice GL distribution account	Request time Invoice GL distribution account
Revenue adjustments	Revenue adjustment amount for the engagement, calculated during the revenue recognition process

Column	Description
Revenue recognition adjustment factor	Revenue recognition adjustment factor applied to time, expenses, fixed-fee deliverables, and milestones, and used to reduce the revenue recognized to a more conservative amount
Revenue recognition enabled (Y/N)	Indicates if the engagement has been enabled for revenue recognition
Revenue recognized (Y/N)	Revenue amount recognized for the engagement during the revenue recognition process
Revenue tentative amount	Tentative amount recognized for the engagement during the revenue recognition process
Second-level invoice approval delegated to	Name of the resource that the second-level invoice approval was delegated to
Second-level invoice approver	Name of the second level invoice approver for the engagement
Secondary expense approval has been delegated (Y/N)	Indicates if secondary expense approval has been delegated to another approver
Secondary expense approver	Secondary expense approver who approves expenses submitted by the engagement expense approver
Secondary time approval has been delegated (Y/N)	Indicates if secondary time approval has been delegated to another approver
Secondary time approver	Secondary time approver who approves time submitted by the engagement time approver
Split billing (Y/N)	Indicates if billing amounts will be split among multiple customers.
Split billing rule change date	Date the split billing rules were changed. Split billing rules can only be changed if no invoices were generated for the engagement, or if all invoices are in **Archived** status (to prevent credit notes being issued for invoices generated with the old split billing rules)
Support desk	The default support desk to handle issues for the engagement, which automatically displays on the requests created for the engagement.
Template (Y/N)	Indicates if the engagement is a template that can be used to create engagements based on the information in the current engagement
Tentative revenue recognition run date	Date the tentative revenue recognition process was run for the engagement

Column	Description
Time approval delegated (Y/N)	Indicates if time approval has been delegated.
Time approver	Time approver for the engagement.
Two-level invoice approval (Y/N)	Indicates if two levels of approval are required for all invoices related to the engagement
Two-level invoice approval on contract overage (Y/N)	Indicates if the two-level approval is required for invoices exceeding the contract amount set in the engagement.
Two-level invoice approval on write-offs (Y/N)	Indicates if the two-level invoice approval is required for invoices with write-offs under the engagement.
Updated by	Resource who last updated the engagement information.
Updated on	Date the engagement information was last updated
Use record date for tax calculation (Y/N)	Indicates if taxation is calculated based on the date the record was created, as opposed to the invoice date.
Work location	Engagement work location.
Work location group	Engagement work location group.
Work performed for	Organization for which the work is performed.
Workflow history	

Engagement fixed fees

Column	Description
Allow selection on tasks (Y/N)	Indicates if fixed-fee deliverables can be selected on tasks.
Billing currency	Billing currency.
Billing date	Date that the fixed-fee deliverable is billed.
Billing office	Billing office of the engagement associated with the fixed-fee deliverable.
Capital (Y/N)	Indicates if the fixed-fee deliverable is a capital cost.
Company	Company to which the fixed-fee deliverable will be delivered.
Created by	Resource who created the fixed fee record.
Created on	Date the fixed fee record was created.

Column	Description
Deliverable name	Name of the fixed-fee deliverable.
Do not invoice (Y/N)	Indicates if the revenue is recognized based on a total amount, and not on fixed fee payments on a regular schedule.
Engagement	Engagement associated with the fixed fee.
Fixed fee billed (Y/N)	Indicates if the fixed-fee deliverable has been billed.
Fixed fee billing amount	
Fixed fee ID	Custom ID for fixed fees.
Fixed fee Invoice GL distribution account	Fixed fee Invoice GL distribution account
GL credit account	GL credit account for the deliverable.
GL debit account	GL debit account for the deliverable.
Invoice only when tasks are completed	Invoice only when tasks are completed
Invoiced amount	Amount invoiced for the deliverable.
Latest revenue recognition run date	Date that the revenue recognition was last run.
Parent deliverable	Parent deliverable for the deliverable.
Physical percent complete	Value for the physical percent complete, if the revenue recognition method is selected.
Prepaid (Y/N)	Indicates if the deliverable is prepaid.
Revenue adjustment	Total amount of adjustments made to the revenue that was recognized for the deliverable.
Revenue recognition method	Revenue recognition method for fixed fees.
Revenue recognized (Y/N)	Indicates if revenue has been recognized for the fixed fee.
Schedule item	Indicates if the fixed fee item is a schedule item.
Split billing percentage	Percentage to be invoiced to the company.
Tentative revenue amount	Tentative revenue amount for the fixed fee.
Updated by	Resource who last updated the fixed fee information.
Updated on	Date the fixed fee information was last updated.
Work code	Engagement work code.
Work code category	Engagement work code category.

Column	Description
Work location	Engagement work location.
Work location group	Engagement work location group.

Engagement products

Column	Description
Allow selection on tasks	Allow selection on tasks
Available for billing	Available for billing
Billing currency code	Billing currency code.
Billing date	Date the product will be invoiced.
Billing office	Billing office of the engagement associated with the product.
Capital (Y/N)	Indicates if the product is a capital cost.
Comments	Comments about the product.
Company	Company to which the product will be delivered.
Created by	Resource who created the product.
Created on	Date the product was created.
Do not invoice (Y/N)	Indicates if the product will be invoiced.
Engagement	Engagement associated with the product.
Fixed unit cost (Y/N)	Indicates if the product is included in a request that uses the effort and product billing type. If ‘Yes’, only the unit price of the product is invoiced.
GL credit account	GL credit account for the product.
GL debit account	GL debit account for the product.
Invoiced quantity	Invoiced quantity of products.
Negotiated cost	Product cost that has been negotiated for the engagement.
Negotiated price	Product price that has been negotiated for the engagement.
Parent product	Parent product.
Physical percent complete	Value for the physical percent complete, if the revenue recognition method is selected.
Product Invoice GL distribution account	Product Invoice GL distribution account

Column	Description
Product name	Product name.
Project name	Project associated with the product.
Quantity	Units of the product to be delivered.
Resource	Resource for which the product costs that do not go through the expense reporting process can be tracked through custom reports.
Revenue adjustment	Total amount of adjustments made to the revenue that was recognized for the product.
Revenue recognition method	Revenue recognition method for the product.
Revenue recognized	Indicates if revenue has been recognized for the product.
Split billing percentage	The percentage of the billing amount that has been billed
Standard cost	Standard cost of the product.
Standard cost currency	Standard cost currency.
Standard cost currency code	Standard cost currency code.
Standard price	Standard price of the product.
Tentative revenue amount	Tentative revenue amount for the product.
Total negotiated cost	Total costs for products, based on negotiated cost.
Total negotiated price	Total price for products, based on negotiated price.
Total standard cost	Total costs for products, based on standard cost.
Total standard price	Total price for products, based on standard price.
Updated by	Resource who last updated the product information.
Updated on	Date the product information was last updated.
Work location	Engagement work location.
Work location group	Engagement work location group.

CHAPTER 9
Expenses

Expenses

Column	Description
Approval date	Date the expense report has been approved.
Approver in Finance	Financial approver of the expense.
Associated task	Task associated with the expense.
Billable (Y/N)	Indicates if the expense is billable.
Billing office	Billing office of the engagement associated with the incurred expense.
Billing office cost center	Cost center of the billing office specified for the engagement associated with the incurred expense.
Capital (Y/N)	Indicates if the expense is designated as a capital cost.
Company	Customer to whom the expense will billed.
Created on	Date the expense record was interfaced to another system (field used for custom reporting and integrations only).
Currency code	Currency code.
Date interfaced	Date the expense record was created in the system (which may be different than the expense date).
Description	
Engagement associated workgroup	Workgroup specified in the engagement and used for resource demand calculations. By default, the staffing workgroup is the engagement manager's workgroup.
Engagement cost center	Cost center of the engagement under which the expense incurred.
Engagement currency	Currency of the engagement under which the expense incurred.
Engagement currency code	Engagement currency code.
Engagement manager cost center	Cost center of the engagement manager responsible for the engagement for which the expense incurred.

Column	Description
Engagement manager workgroup	Workgroup of the engagement manager responsible for the engagement under which the expense incurred.
Engagement name	Engagement name.
Entered by	Resource who entered the expense (either the resource or a central expense administrator).
Exchange rate	Exchange rate applied to the expense amount, if this amount is in another currency than the default currency.
Expense billing (%)	Percentage of the expense amount that will invoiced to the customer.
Expense category	Category of the expense.
Expense cost amount	Total cost amount of the expense (Quantity * Unit Price minus recoverable tax amount).
Expense currency	Currency in which the expense was incurred.
Expense date	Date the expense was incurred.
Expense quantity	Number of items/units included in the expense
Expense report number	Number of the expense report that includes the expense.
Expense status	Status of the expense and its associated expense report.
Expense type	Expense type.
Expense unit price	Amount billed per expense item.
Finance action date	
First level approver	Approver of the expense report for the first level of approval (engagement expense approver or resource expense approver).
Fixed fee (Y/N)	Indicates if a fixed fee is associated with the expense.
Fixed fee name	Fixed-fee deliverable associated with the expense.
Global workgroup	Global workgroup of the resource who entered the expense.
Incurred-in location	Work location where the expense was incurred.
Incurred-in location group	
Invoice status	Current status of the invoice including the expense.
Invoiced expense amount	Expense amount that will be invoiced to the customer.
Locked (Y/N)	Indicates if the expense record was locked (generally done if the expense record has been exported or reported on in another financial system).

Column	Description
Partially recognized (Y/N)	Indicates if the revenue amount including the expense has been partially recognized.
Profile link	
Project manager workgroup	Workgroup of the project manager responsible for the project under which the expense incurred.
Project name	Project for which the expense incurred.
Recognition batch number	Number assigned to recognized data that includes the current expense, once the tentative revenue amount is committed
Recognition currency conversion date	Date specified to convert the expense currency to the engagement currency during the revenue recognition process (exchange rate at runtime or exchange rate at the end of the week).
Recognized (Y/N)	Indicates if the revenue amount including the expense has been recognized.
Recognized amount	Committed recognized amount calculated during the revenue recognition process.
Recoverable tax amount	Total amount of recoverable taxes applied to the expense.
Recoverable tax schedule name	Tax schedule applied to the expense to calculate the included tax amount.
Reimbursable (Y/N)	Indicates if the expense is reimbursable.
Rejected (Y/N)	Indicates if the expense has been rejected by the expense approver.
Rejected by	Expense approver who rejected the expense.
Rejected on	Date and time the expense was rejected.
Rejection reason	Reason for the rejection of the expense.
Resource cost center	Cost center of the resource who entered the expense in the system.
Resource name	Resource who submitted the expense.
Revenue GL credit account	Revenue GL credit account associated with the expense category when recognizing revenue.
Revenue GL debit account	Revenue GL debit account associated with the expense category when recognizing revenue.
Split billing (Y/N)	Indicates if split billing is enabled for the engagement for which the expense incurred.
Split billing percentage	Percentage of the expense that has been billed to date, if split billing is enabled for the engagement. The expense record will be fully billed when the split billing percentage indicates 100.

Column	Description
Submitted by	Resource who submitted the expense report.
Submitted on	Date and time the expense report was submitted.
Tentative revenue amount	Amount of the tentative revenue recognition including the expense.
Threshold approver	Threshold expense approver.
Transfer destination project	Project to which the expenses have been transferred.
Unbilled amount for expenses	Total amount for expenses that has not yet been invoiced to the customer.
Work code	Work code of the task associated to the incurred expense.
Work code category	Work code category of the task associated to the incurred expense.
Work performed for	Company for whom work was performed (if this company differs from the one billed for the expense)
Workgroup	

CHAPTER 10
Financial Analysis

About financial analysis data

This chapter consolidates the following financial analysis data:

- Financial analysis by customer (daily, monthly, fiscal period)
- Financial analysis by project (daily, monthly, fiscal period)
- Financial analysis by task assignment (daily, monthly, fiscal period)

The data is split up into common data, smaller groups of the other fields, and the most commonly used data in a summary.

Tip: Select fields from the **Common** group, and then fields from the other groups. To reduce the amount of rows returned, create a filter to exclude NULL values for each field in the report.

Financial analysis by customer and by project

By default, the data is grouped by project in the **Financial analysis by project** group, then summed and grouped by engagement in the **Financial analysis by customer** group.

The fiscal period data providers have an additional column **Fiscal period billing office** that indicates the set of fiscal periods that is associated with the data.

Calculations in the financial analysis summary data

The underlying financial analysis views rely on data that is calculated by the `Financial Analysis Summary` and `Calculate Project Costs` jobs for specific record types. The new table `FinAnnRecType` contains all the record types. The **Enabled** field indicates which record types are enabled for calculation.

By default, only record type 48 and the record types that existed before the upgrade (0-26) are enabled. If your organization uses funding sources, additional record types 28, 29, 42, and 43 are also enabled by the upgrade. Additional record types can be enabled. Existing record types can be disabled if they are not being used. For example, the types for forecast may be disabled if status updates are not required and the information is not needed for reporting.

Note: These changes must be made directly in the database table by the database administrator.

WARNING: The more record types that are enabled, the longer the processing of the two jobs will take. This applies particularly to record types that group data at the task assignment level.

Dependencies among the record types

- If your organization uses the scenario comparisons functionality, the record types 0-26 and 48, which are enabled by default, must remain enabled.
- If your organization uses funding sources, existing record types must remain enabled. To start using funding sources after the upgrade, enable the appropriate record types:
  - If projects are associated with funding sources, enable record types 28, 29, 42, and 43.
  - If requests are associated with funding sources, enable record types 1, 3, 7, 9, 21, 22, and 23.
  - If opportunities are associated with funding sources, enable record types 11, 12, 13, and 14.
  - If any record type that is related to invoiced items (type 1, 2, 20, 32, 37, 38, 39, 40, 41, and 46) is enabled, enable the record type 0.
  - If record type 12 is used, enable the record type 11.
  - If record type 14 is used, enable the record type 13.

Budget service calculations

The distribution of effort (hours, days and FTEs for budget services associated with a fixed fee and for budget services not associated with a fixed fee) is based on the the budget dialog box and whether amounts have been entered into fiscal periods. Otherwise the effort is distributed evenly over the working days between the start and finish dates of the budget services.

The amount at the task assignment level includes only budget service records associated with task assignments (entered in the budget by copying task assignments from projects or manually associated with a task in the budget) and there is a task assignment with the taskid and the resourceid matches the budget resourceid. The calculation at the project level includes all budget service records, whether they are associated with a task assignment or not (including ad-hoc budget services).

The calculation at the customer level includes all project budget amounts associated with that customer, grouped by engagement. It does not include engagement budgets.

Revenue Recognition

Revenue recognition amounts include only calculations at the project level. Revenue that is recognized but is not associated with the project is excluded.

Revenue recognition from additional items does not appear in the financial analysis summary data.

Planned and forecast hours, cost, and billing amounts

Planned effort is distributed between the planned start and planned finish dates, depending on the data that is available.

Daily distributions are used, if they exist. Otherwise the fiscal period amounts are distributed over the working days between the start and finish dates of each fiscal period.

If fiscal period and daily distributions do not exist, the effort is distributed evenly over the working days between the planned start and planned finish dates.

- Because you have information for the entire timeline, data can be compared against actuals, budget, etc. However, you must add additional logic to reports in which a combination of actuals in the past, and planned in the current and future, is required.

  For example, if you simply add planned hours + actual hours, the amounts in the past can be inflated because past amounts include both planned and actuals.
- Planned information calculated for completed tasks is also distributed between the planned start and planned finish dates (distribution logic is the same as for planned information). Keeping planned information allows for comparisons; however, it also means that the effort, billing, and cost amounts will be shown for future dates when a task assignment is completed.
- If you are the project manager, you can adjust the planned finish date to reflect the early completion (baselines can contain the original information). An alternative is create your own join to the tasks query subject to add the **Completed** status of assignments. Completed assignments can then be filtered out from the planned calculations for future dates.
- Forecast information applies from today or from the forecast start date forward, whichever is later, since the amount includes remaining hours only, not total hours. If the forecast finish date is in the past, all remaining hours are included in today's date (or the next available working day if today is a nonworking day).
- Cost and billing rates are applied using the normal rules for finding rates: the rate in effect as of the date of each record, which could represent a daily distribution or a fiscal period start date.
- The currency conversion to the engagement currency uses the exchange rate in effect on the date the `Financial Analysis Summary Calculation` job runs.
- Planned data is not recalculated when exchange rates are added or changed.
- Hours, costs, and billing amounts from subprojects are not included in the main project, even if the **Roll up planned information from subprojects to parent task** check box is selected in the main project.
- For tasks whose planned finish date is more than five years in the future, the remainder of the effort is distributed to the last day available, which could result in a much larger effort amount at the date corresponding to the end of the five year period.

Baseline effort distribution

- Effort is evenly distributed over the working days between the baseline start and finish dates, and the cost and billing rate in effect on each working date is used.
- The currency conversion to the engagement currency uses the exchange rate in effect on the date the `Financial Analysis Summary Calculation` job runs.

- Baseline data is not recalculated when exchange rates are added or changed.

Note: If there are tasks with no assignments, the amounts at the project level are not equal to the sum of the task assignment amounts.

Invoiced and unbilled amounts

- Hours and costs for unbilled time or expenses, and unapproved billable time or expenses are grouped by the date of the time record or the expense date.
- Adjustments for invoiced record amounts are calculated only at the engagement level.
- The fields for invoiced time, expenses and products group the effort and cost amounts by the invoice date. The fields with “by record date” in their names group the effort and cost amounts by the date of the time record, expense date, or material date.

  If you create a report that contains both records by invoice date and records by record date, the effort and cost data is duplicated in the report.

Actual hours, actual time and expense cost

The time control setting specified in Changepoint Administration that determines when time entries are to be considered as actual time (at the time of entry, submission, or approval) applies to all actuals for time and expenses.

Amounts are converted to the engagement currency using the exchange rate in effect on the record date (for example, the time record date).

Note: Unbilled record types always refer to approved records.

Overtime hours

- For all actual data record types, whether billable or unbillable (record types 0, 1, 3, 7, 9, 32, 33, 34, 35, 37, and 38), the overtime effort is always included in the applicable effort and cost fields.
- The cost of overtime is calculated using the overtime cost rate.
- For record types 0, 1, 3, 7, 9, 32, 33, 34, 35, 37, and 38, the billing amount of overtime effort is calculated and included only if the **Include overtime** check box is selected in the engagement. The overtime billing rate is used.
- If the **Include overtime** check box is not selected, the billing amount for overtime is zero, but the hours are still shown as billable.

Financial analysis record types

Record types used in financial analysis are described in the `FinAnnRecType` table. In this table, `FinAnnRecType` is a numeric value that corresponds to the record type in the `finannsummary` table/view, which is used for validation and troubleshooting.

Common

- Depending on the record type, customer, opportunity, engagement, or project name
- Currency and currency code

- Record type in the `finannsummary` table
- Date of a record type:
  - Invoiced amounts and costs display the invoice date. Additional fields display the invoiced cost and effort amounts by record date (time date, expense date, material date) instead of invoice date.
  - Unbilled amounts and costs, including both unbilled and unapproved billable time and expense records display the record date (time date, expense date, material date)
  - Unbilled fixed fees and products display the billing date specified for the record.
  - Unbillable amounts display the record date (time date, expense date, material date).

Invoiced other amounts not associated with a project, by invoiced date (rectype 0)

- Invoiced amounts for products, additional items, expense adjustments, and project time adjustments
- Cost amounts for invoiced products

Invoiced project request time (rectype 1)

- Invoiced request effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Billing amount and cost amount for invoiced request time

Invoiced project expenses, products, fixed fees, task time (rectype 1, 2, 40)

- Invoiced actual billable effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Invoiced effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees, written off the invoices
- Invoiced amounts for expenses, fixed fees, and products
- Cost amounts for expenses and products
- Invoiced amounts and cost amounts for project time associated with fixed fees and not associated with fixed fees

Unbilled project request time (rectype 3)

- Unbilled request effort in hours, days, and FTEs
- Unbilled billing and cost amounts for time spent on requests

Unbilled project expenses, products, and task time (rectype 3, 4, 5, 6)

- Unbilled project effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Unbilled billing amounts for project expenses, products, fixed, and time
- Unbilled cost amounts for project expenses, products and time

Unapproved billable project request time (rectype 7)

- Billable request effort in hours, days, and FTEs, not yet approved
- Billable billing and cost amounts for request time, not yet approved

Unapproved billable project expenses and time (rectype 7, 8)

- Billable project effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fee, not yet approved
- Billable billing amounts for project time and expenses, not yet approved
- Cost amounts for project time and expenses, not yet approved

Unbillable project request time (rectype 9)

- Unbillable request effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Unbillable billing and cost amounts for request time

Unbillable project expenses, products, and task time (rectype 9, 10)

- Unbillable project effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Unbillable billing and cost amounts for project expenses, products, and time

Non-weighted opportunity services, expenses, products, fixed fees (rectype 11, 13)

- Non-weighted opportunity service effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fee
- Billing amounts and cost for non-weighted opportunity time
- Revenue and cost for non-weighted opportunity products

Weighted opportunity services, expenses, products, and fixed fees (rectype 12, 14)

- Weighted opportunity service effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Billing and cost amounts for weighted opportunity time
- Revenue and cost for weighted opportunity products

Engagement projected resources (rectype 15)

- Effort of projected resources in hours, days, and FTEs
- Billing and cost amounts for the time spent by projected resources

Billable project planned labor (rectype 16)

- Planned effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Planned billing and cost amounts for time spent on projects

Billable project forecast labor (rectype 17)

- Forecast effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Forecast billing and cost amounts for time spent on projects

Unbillable project planned labor (rectype 18)

- Unbillable planned effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Unbillable planned billing and cost amounts for time spent on projects

Unbillable project forecast labor (rectype 19)

- Unbillable forecast effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Unbillable forecast billing and cost amounts for time spent on projects

Invoiced product amounts not associated with a project, by invoice date (rectype 20)

Invoiced product billing and cost amounts, not associated with a project, by invoice date

Unbillable request demand time (rectype 21)

- Unbillable request demand effort in hours, days, and FTEs
- Unbillable cost amounts for time spent on request demand

Billable request demand time (rectype 22)

- Request demand effort in hours, days, and FTEs

Fixed fee request demand time (rectype 23)

- Request demand effort in hours, days, and FTEs, associated with fixed fees
- Request demand billing and cost amounts for time spent on requests associated with fixed fees

Billable project team (rectype 24)

- Project team effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Project team billing and cost amounts for time spent on projects

Unbillable project team effort (rectype 25)

- Unbillable project team effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Unbillable billing and cost amounts for the time of project teams

Billable budget effort, products, fixed fees, expenses (rectype 26)

- Budgeted effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Budgeted billing and cost amounts for time spent on services, products, and expenses

Billable project baseline labor (rectype 27)

- Baseline effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Baseline billing and cost amounts for time spent on projects
- Request demand billing and cost amounts for time spent on requests

Billable task assignment planned labor (rectype 28)

- Planned billable effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Planned billable billing and cost amounts for time spent on assignments

Billable task assignment forecast labor (rectype 29)

- Forecast billable effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Forecast billable billing and cost amounts for time spent on assignments

Billable budget task assignment effort, cost, and billing amount (rectype 30)

- Billable budget effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Budgeted billable billing and cost amounts for time spent on assignments
- Billable budget fixed fees

Billable task assignment baseline labor (rectype 31)

- Baseline billable effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Baseline billable billing and cost amounts for time spent on assignments

Invoiced task assignment time and fixed fee (rectype 32, 46)

- Invoiced amount for fixed fees
- Invoiced amount for project time

- Invoiced actual billable effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Invoiced actual written off effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Cost of invoiced project time, associated with fixed fees or not associated with fixed fees

Unbilled task assignment time and fixed fees (rectype 33, 47)

- Unbilled amount for fixed fees
- Unbilled amount for project time
- Unbilled project effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Cost of unbilled project time, associated with fixed fees or not associated with fixed fees

Unapproved billable task assignment time (rectype 34)

- Unapproved billable project effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Unapproved billable project time billing and cost amounts, associated with fixed fees or not associated with fixed fees

Unbillable task assignment time (rectype 35)

- Unbillable project effort in hours, days, and FTEs, associated with fixed fees or not associated with fixed fees
- Unbillable project time billing and cost amounts, associated with fixed fees or not associated with fixed fees

Revenue recognition for time, expenses, products, and fixed fees (rectype 36)

- Revenue recognition amounts for effort in hours, days, and FTEs
- Revenue recognition amounts for time, expenses, and products
- Cost amounts for time, expenses, and products

Invoiced project request time cost, by record date (rectype 37)

- Invoiced request effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Cost amount for invoiced request time

Invoiced project expenses, products, task time, by record date (rectype 37, 39)

- Invoiced actual billable effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Invoiced effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees, written off the invoices.
- Invoiced amounts and cost amounts for expenses and products

- Invoiced amounts and cost amounts for project time associated with fixed fees and not associated with fixed fees

Invoiced task assignment time (rectype 38)

- Invoiced actual billable effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees, by record date
- Invoiced actual written off effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Cost of invoiced project time, associated with fixed fees and not associated with fixed fees by record date

Invoiced product amounts not associated with a project, by record date (rectype 41)

Invoiced amounts and cost amounts for products

Unbillable task assignment planned labor (rectype 42)

- Planned unbillable effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Planned billable billing and cost amounts, associated with fixed fees and not associated with fixed fees

Unbillable task assignment forecast labor (rectype 43)

- Forecast unbillable effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Forecast billable billing and cost amounts, associated with fixed fees and not associated with fixed fees

Unbillable task assignment baseline labor (rectype 44)

- Unbillable project baseline effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Unbillable billing and cost amounts for task baseline time, associated with fixed fees and not associated with fixed fees

Unbillable project baseline labor (rectype 45)

- Unbillable baseline effort in hours, days, and FTEs, associated to fixed fees or not
- Unbillable billing and cost amounts for project baseline time

Unbillable budget services, products, fixed fees, and expenses (rectype 48)

- Unbillable budget service effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Cost of unbillable budget service effort, products and expenses

Unbillable task assignment budget services (rectype 49)

- Budget unbillable effort in hours, days, and FTEs, associated with fixed fees and not associated with fixed fees
- Budget unbillable cost amounts, associated with fixed fees and not associated with fixed fees

CHAPTER 11

Global Workgroups

Global workgroups

Column	Description
Cost center	Cost center of the global workgroup.
Created by	Resource who created the global workgroup profile.
Created on	Date and time the global workgroup profile was created.
Default currency	Default currency of the global workgroup.
Default currency code	Code of the default currency.
Global workgroup	Global workgroup name.
Global workgroup description	Description of the global workgroup.
Profile link	
Updated by	Resource who last updated the global workgroup profile.
Updated on	Date and time the global workgroup profile was last updated.

CHAPTER 12
Invoices

Invoiced request time

Column	Description
Billing rate	Billing rate applied to the time billed to the customer. If the related engagement uses daily billing rates, the daily billing rate is divided by the number of hours worked by the assigned resource.
Billing role	Billing role associated with project time, based on the task assignment and task assignment history.
Count	Metric to perform data aggregation.
Credit note number	Credit note number (if a credit note has been issued for the invoice that includes the time record).
Customer split billing percentage	Percentage of the amount billed to the customer (if split billing is enabled in the engagement associated with the time record).
Daily conversion factor	Daily conversion factor of the invoiced time record, used to calculate effort in FTEs and days.
Daily fraction	Fraction of a day used when billing work/time for an engagement with the daily billing type.
Description	Description
Include overtime (Y/N)	Indicates if overtime related to the engagement is included. For split billing, the inclusion of overtime is set in the master engagement.
Invoice currency	Invoice currency.
Invoice currency code	Invoice currency code.
Invoice date	Date of the invoice that includes the time record.
Invoice number	Number of the invoice that including the time record.
Invoice posting date	Date the invoice including the time records was posted.
Invoice status	Current status of the invoice including the time record.
Overtime effort (days)	Overtime in days that has been billed (overtime effort in hours divided by the daily conversion factor of the invoiced time record).
Overtime effort (hours)	Overtime in hours that has been billed.

Column	Description
Overtime effort written off (days)	Overtime in days that has been written off (overtime written off effort in hours divided by the daily conversion factor of the invoiced time record).
Overtime effort written off (hours)	Overtime in hours that has been written off.
Overtime percentage	Billing rate increase for overtime, as specified in the engagement. For example: 150% means a 50% increase from the base rate for overtime ($200/hr. will be $300/hr.) will be billed to the customer.
Profile link	
Project name	Project name
Regular effort (days)	Regular time in days that has been billed (regular effort in hours divided by the daily conversion factor of the invoiced time record).
Regular effort (hours)	Regular effort in hours that has been billed.
Regular effort written off (days)	Regular effort in days that has been written off (written off effort in hours divided by the daily conversion factor of the invoiced time record).
Regular effort written off (hours)	Regular effort in hours that has been written off.
Tax amount	Tax amount associated with the time record.
Tax schedule	Tax schedule associated with the time record.
Time entry type	Type of time entry (project time, non-project time or request time).
Work performed for	Customer for whom work was performed (if this customer differs from the one invoiced for the work).
Write-off affects utilization (Y/N)	Indicates if the write-off affects the utilization of resources.
Write-off description	Write-off description.
Write-off reason	Reason for the time write-off.
Write-off/up (Y/N)	Indicates if time has been written of or written up.
ÿSingularTitle,Invoiceÿ status code	Invoice status code

Invoiced time

Column	Description
Billing rate	Billing rate applied to the time billed to the customer. If the related engagement uses daily billing rates, the daily billing rate is divided by the number of hours worked by the assigned resource.
Billing role	Billing role associated with project time, based on the task assignment and task assignment history.
Count	Metric to perform data aggregation.
Credit note number	
Customer split billing percentage	Percentage of the amount billed to the customer (if split billing is enabled in the engagement associated with the time record).
Daily conversion factor	Daily conversion factor of the invoiced time record, used to calculate effort in FTEs and days.
Daily fraction	Fraction of a day used when billing work/time for an engagement with the daily billing type.
Description	Description
Include overtime (Y/N)	Indicates if overtime related to the engagement is included. For split billing, the inclusion of overtime is set in the master engagement.
Invoice currency	Invoice currency.
Invoice currency code	Invoice currency code.
Invoice date	Date of the invoice that includes the time record.
Invoice number	Number of the invoice number that includes the time record.
Invoice posting date	Date the invoice that includes the time records was posted.
Invoice status	Current status of the invoice that includes the time record.
Overtime effort (days)	Overtime in days that has been billed (overtime effort in hours divided by the daily conversion factor of the invoiced time record).
Overtime effort (hours)	Overtime in hours that has been billed.
Overtime effort written off (days)	Overtime in days that has been written off (overtime written off effort in hours divided by the daily conversion factor of the invoiced time record).
Overtime effort written off (hours)	Overtime in hours that has been written off.

Column	Description
Overtime percentage	Billing rate increase for overtime, as specified in the engagement. For example: 150% means a 50% increase from the base rate for overtime ($200/hr. will be $300/hr.) will be billed to the customer.
Profile link	
Regular effort (days)	Regular effort in days that has been billed (regular effort in hours divided by the daily conversion factor of the invoiced time record).
Regular effort (hours)	Regular effort in hours that has been billed.
Regular effort written off (days)	Regular effort in days that has been written off (written off effort in hours divided by the daily conversion factor of the invoiced time record).
Regular effort written off (hours)	Regular effort in hours that has been written off.
Tax amount	Tax amount associated with the time record.
Tax schedule	Tax schedule associated with the time record.
Time entry type	Type of time entry (project time, non-project time or request time).
Work performed for	Customer for whom work was performed (if this customer differs from the one invoiced for the work).
Write-off affects utilization (Y/N)	Indicates if the write-off affects the utilization of resources.
Write-off description	Description entered for the write-off.
Write-off reason	Reason for the time write-off.
Write-off/up (Y/N)	Indicates if a write-off or a write-up was applied to the time record.
ÿSingularTitle,Invoiceÿ status code	Invoice status code

Invoiced expenses

Column	Description
Applied billing percentage	Percentage of the expense that will be billed to the customer.
Billing amount	Expense billing amount.

Column	Description
Billing tax amount	Amount of tax related to the expense amount and billed to the customer.
Billing tax schedule name	Billing tax schedule that applies to the expense.
Company	Company/customer to be billed for the expenses.
Count	Metric to perform data aggregation.
Credit note number	Credit note number (if a credit note has been issued for the invoice that includes the expense).
Customer split billing percentage	Percentage of the amount billed to the customer (if split billing is enabled in the engagement associated with the expense record).
Description	
Engagement currency	Engagement currency.
Engagement currency code	Engagement currency code.
Exchange rate	
Expense quantity	Number of items/units included in the expense.
Expense write-off description	Description of the amount written off.
Internal credit note number	
Internal invoice number	
Invoice date	Date of the invoice that includes the expense record.
Invoice number	Number of the invoice that includes the expense.
Invoice posting date	Date the invoice that includes the expense records was posted.
Profile link	
Recoverable tax amount	Amount of recoverable tax stripped from the expense when it was billed.
Work performed for	Company for whom work was performed (if this company differs from the one billed for the work).
Write-off (Y/N)	Indicates if a write-off or a write-up was applied to the expense amount.
Write-off amount	Monetary amount that was written off from the original expense amount.

Column	Description
Write-off reason	Reason for the expense write-off.
ÿSingularTitle,Invoiceÿ status code	Invoice status code.

CHAPTER 13
Lookups

Currency lookup

Column	Description
Code name	
Currency code	
Currency code and name	
Currency index	
Currency name, short	
Description	
Language	

CHAPTER 14
Materials

Materials

Column	Description
Budget name	Budget name
Budget product	Budget product
Capital (Y/N)	Indicates if the material is designated as a capital expenditure.
Created by	Resource who created the material profile.
Created on	Date the material profile was created.
Customer	Customer associated to the material.
Customer	Customer associated to the material.
Date interfaced	Date the material record was interfaced to another system (field used for custom reporting and integrations only)
Description	Description of the material.
Engagement	
Engagement product	Product (defined in the engagement) for which the material is created.
Exported (Y/N)	Indicates if the material has been exported to another system (set via interfaces)
Material date	Date when the material record was created.
Negotiated cost	Negotiated cost of the material.
Negotiated cost currency	Negotiated cost currency.
Product	Product associated with the material.
Project	Project associated with the material.
Quantity	Number of units of the material.
Reference number	Reference number of the material.
Resource	Resource associated with the material.
Standard cost	Standard cost of the material.
Standard cost currency	Standard cost currency.

Column	Description
Updated by	Resource who last updated the material information
Updated on	Date the material information was last updated

CHAPTER 15
Opportunities

Opportunities

Column	Description
Billing office	Billing office for the opportunity, which determines the service rates to be used in the forecast.
Billing type	Basis for billing rate calculations (for example, daily, hourly, fixed fee, or mixed).
Business sponsor	
Campaign	Campaign of the opportunity. This field identifies the origin of the opportunity (workgroup) or why the opportunity was initiated.
Company	Company associated with the opportunity.
Created by	Resource who created the opportunity profile.
Created on	Date and time the opportunity was created.
Currency	Currency of the forecasted amounts in the opportunity.
Deleted (Y/N)	Indicates if the opportunity has been deleted.
Description	Description of the opportunity.
Fiscal period selection	Billing office with the fiscal periods to be used when displaying the opportunity information across fiscal years.
Include in forecast rollup (Y/N)	Indicates if the opportunity is included in the opportunity forecast rollup
Initial close	Initial date by which the opportunity-related work is expected to close
Locked forecast (Y/N)	Indicates if the opportunity forecast has been locked
Main contact	Main contact of the customer/company associated with the opportunity
Opportunity	Name of the opportunity
Opportunity alternate name	Alternate name of the opportunity.
Opportunity currency	Opportunity currency.

Column	Description
Opportunity full name	Combined name and alternate name of the opportunity.
Opportunity priority	Priority of the opportunity.
Opportunity type	Type of the opportunity
Originating request	Number of the request from which the opportunity was created, or that is associated with the opportunity.
Outcome [Lost]	Opportunity outcome.
Outcome [No outcome]	Opportunity outcome.
Outcome [Other]	Opportunity outcome.
Outcome [Won]	Opportunity outcome.
Outcome date	Date of the outcome.
Outcome details	Details of the outcome.
Probability	Probability of undertaking the proposed work, shown as a percentage
Product	Products forecasted in the opportunity.
Product cost forecast - Standard	Cost amount for products forecasted in the opportunity, based on the standard unit price.
Product cost forecast- Negotiated	Cost amount for products forecasted in the opportunity, based on a negotiated unit price.
Product revenue forecast - Negotiated	Revenue forecasted for products in the opportunity, based on a negotiated unit price.
Product revenue forecast - Standard	Revenue forecasted for products in the opportunity, based on the standard unit price.
Profile link	
Revenue for services	Revenue forecasted for services at completion of the work associated to the opportunity.
Revenue forecast	Total revenue forecasted for services and products included in the opportunity.
Revised close	Revised date by which the opportunity-related work is expected to close.
Sales representative	Internal resource who is responsible for the opportunity.
Service estimated effort	Effort estimated to complete the work for the opportunity.
Staffing workgroup	Default workgroup used in resource demand calculations related to the opportunity.
Status	

Column	Description
Total capital cost for products	Total cost amount (defined as capital cost) forecasted for products in the opportunity.
Total capital cost for services	Total cost amount (defined as capital cost) forecasted for services in the opportunity.
Total capital cost for services (billing role rates)	Total cost amount (based on billing role rates and defined as capital cost) forecasted for services in the opportunity.
Total capital cost for services (resource rates)	Total cost amount (based on resource rates and defined as capital cost) forecasted for services in the opportunity.
Total non-capital cost for products	Total cost amount (defined as non-capital cost) forecasted for products in the opportunity.
Total non-capital cost for services	Total cost amount (defined as non-capital cost) forecasted for services in the opportunity
Total non-capital cost for services (billing role rates)	Total cost amount (based on billing role rates and defined as non-capital cost) forecasted for services in the opportunity.
Total non-capital cost for services (resource rates)	Total cost amount (based on resource rates and defined as non-capital cost) forecasted for services in the opportunity.
Updated by	Resource who last updated the opportunity information.
Updated on	Date and time the opportunity information was last updated.
Winning competitor	Competitor the opportunity was lost to.

Opportunity expenses

Column	Description
Billable (Y/N)	Indicates if the expense is billable.
Capital (Y/N)	Indicates if the expense amount is designated as a capital cost.
Comments	Comments about the expense.
Created by	Resource who created the record.
Created on	Date and time the record was created.
Company	Company/customer for whom the opportunity was created.
Expense category	Expense category.
Expense date	Date that the expense will be incurred.
Billing percentage	Percentage of the expense that is billable.

Column	Description
Expense type	Expense type.
Manual record	Indicates if a manual record exists.
Opportunity	Name of the opportunity.
Quantity	Quantity of expense items.
Unit cost	Cost per expense item.
Updated by	Resource who last updated the record.
Updated on	Date and time the record was last updated.

Opportunity fixed fees

Column	Description
Capital (Y/N)	Indicates if the fixed fee amount is designated as a capital cost.
Comments	Comments about the fixed fee.
Created by	Resource who created the record in the opportunity.
Created on	Date and time the record was created.
Company	Company/customer for whom the opportunity was created.
Description	Description of the fixed fee.
Fixed fee amount	Fixed fee amount.
Fixed fee date	Date that the fixed-fee deliverable will be billed.
Manual record	Indicates if a manual record exists.
Opportunity	Name of the opportunity.
Updated by	Resource who last updated the record.
Updated on	Date and time the record was last updated.

Opportunity products

Column	Description
Billing office	Billing office for the opportunity.
Capital (Y/N)	Indicates if the revenue for products is designated as a capital cost.
Comments	Comments about the product.
Company	Company/customer for whom the opportunity was created.
Created by	Resource who created the record in the opportunity.
Created on	Date and time the record was added to the opportunity.
Date	Date that the revenue for the product will be generated.
Negotiated unit price	Negotiated unit price.
Opportunity currency	Opportunity currency.
Opportunity currency code	Opportunity currency code.
Opportunity name	Opportunity name.
Opportunity status	Current status of the opportunity
Product name	Product name.
Quantity	Number of products in the opportunity. The quantity can be a negative value, for example, to indicate a credit or a return.
Standard unit price	Standard price per product.
Unit cost	Cost per product.
Updated by	Resource who last updated the record.
Updated on	Date and time the record was last updated.

Opportunity services

Column	Description
Billing office billing role cost rate	Billing role-based cost rate for the billing office.
Billing office billing rate	Billing rate for the billing office.

Column	Description
Billing office	Billing office for the opportunity, which determines the service rates to be used in the forecast.
Billing office currency	Billing office currency.
Billing office currency code	Billing office currency code.
Billing office resource cost rate	Resource-based cost rate for the billing office.
Billing role	Billing role for the service.
Capital (Y/N)	Indicates if the forecasted amount for services is designated as a capital cost.
Comments	Comments about the service.
Company	Company/customer associated with the opportunity.
Cost rate (billing role-based)	Billing role-based cost rate applied to the service.
Cost rate (resource-based)	Resource-based cost rate applied to the service.
Created by	Resource who created the record in the opportunity.
Created on	Date and time the record was created.
Daily conversion factor	Daily conversion factor for the service hours, used to calculate effort in FTEs and days.
End date	Planned end date for the service.
Estimated effort (days)	Estimated effort in days (effort in hours divided by the daily conversion factor).
Estimated effort (FTEs)	Estimated effort in FTEs (effort in hours divided by the daily conversion factor of the service, divided by the number of working days for the service).
Estimated effort (hours)	Estimated effort in hours.
Fixed fee (Y/N)	Indicates if the service is billed as a fixed-fee deliverable.
Negotiated billing rate	Negotiated billing rate for the service.
Negotiated cost rate	Negotiated cost rate for the service.
Number of working days	Number of working days for the service (used to calculate FTEs).
Opportunity currency	Opportunity currency.
Opportunity currency code	Opportunity currency code.

Column	Description
Opportunity name	Opportunity name.
Opportunity status	Current status of the opportunity.
Resource	Resource required to perform the work.
Location	Location of the company associated with the opportunity.
Sales representative	Internal resource responsible for the opportunity.
Service function	Function of the resource or billing role associated with the service.
Staffed (Y/N)	Indicates if a resource has been assigned to perform the work.
Staffing workgroup	Workgroup used in resource demand calculations (by default, the sales representative's workgroup).
Standard billing rate	Standard billing rate for the billing role.
Standard cost rate	Standard cost rate for the billing role.
Start date	Planned start date specified for the service in the opportunity.
Total billing amount	Total billing amount for services in the opportunity.
Updated by	Resource who last updated the record.
Updated on	Date and time the record was last updated.
Workgroup name	Workgroup of the sales representative responsible for the opportunity.

CHAPTER 16
Portfolios

Portfolios

Column	Description
Actual date	Actual value for the project metric (for example, a date for a scheduled metric).
Code 1	Configurable fields
Code 2	
Code 3	
Color code	Color code of the overall health of the portfolio.
Created by	Resource who created the portfolio.
Created on	Date the portfolio was created.
Currency code	Currency code.
Customer	Customer associated with the project.
Engagement manager	Engagement manager of the project engagement.
Engagement name	Engagement of the project.
Fiscal period selection	Billing office that includes the fiscal periods that are used to filter portfolio data.
History data (Y/N)	Portfolio data history: ‘0’ indicates that the data is the most current data, ‘1’ indicates a record in the history.
Metric	Metric that was selected on the portfolio.
Metric actuals	Actual value for project metric (cost, effort, or schedule).
Opportunity name	Opportunity associated with the projects in the portfolio.
Portfolio	Name of the portfolio.
Portfolio category	Portfolio category.
Portfolio currency	Portfolio currency. All monetary target and actual amounts are converted to and displayed in this currency.
Portfolio description	Portfolio description.
Profile link	

Column	Description
Project	Project in the portfolio.
Project manager	Project manager of the portfolio project.
Project weighting	Weighting of the project in the portfolio (which indicates its relative importance).
Request number	Request included in the actuals of the portfolio summary.
Result date	Date the portfolio results were generated.
Rollup portfolio (Y/N)	Indicates if the portfolio is a rollup portfolio.
Status	Indicates the status of the portfolio project.
Stored procedure for portfolio item health	Custom stored procedure that overrides the standard health calculation for portfolios items.
Stored procedure for portfolio overall health	Custom stored procedure that overrides the standard health calculation for portfolios.
Target (numeric)	Target value for the project metric (for example, a numeric value for a cost or effort metric).
Target date	Target value for the project metric (for example, a date for a scheduled metric).
Text 1	Configurable fields
Text 2	
Text 3	
Variance	For cost and effort metrics: actual minus target. For schedule metrics: the difference in days between the target date and the actual date, which represents the end date for the project versus the target.

CHAPTER 17
Products

Products

Column	Description
Available for engagements (Y/N)	Indicates if the product is available for selection in engagements.
Available for opportunities (Y/N)	Indicates if the product is available for selection in opportunities.
Available for requests (Y/N)	Indicates if the product is available for selection in requests.
Business contact	Resource from the organization responsible for the product.
Count	Metric to perform data aggregation.
Created by	Resource who created the record.
Created on	Date and time the record has been created.
Currency	Currency of the product billing amount.
Currency code	Currency code.
Deleted (Y/N)	Indicates if the record has been deleted.
Description	Description of the product.
Fixed unit cost (Y/N)	Indicates if a fixed unit cost is applied to the product.
Product category	Product category.
Product close date	End date of the availability period of the product.
Product name	Product name.
Product number	Product number.
Product open date	Start date of the availability period of the product.
Product status	Current status of the product.
Product unit cost	Unit cost of the product.
Profile link	
Technical contact	Resource responsible for the technical aspect of the product.
Updated by	Resource who last updated the record.

Column	Description
Updated on	Date the record was last updated.
View in Client Portal (Y/N)	Indicates if the product profile can be viewed through the Client Portal.

CHAPTER 18
Projects

Projects

Column	Description
Actual effort (days)	Actual effort in days, as calculated by the last project rollup: sum of the actual effort (days) for task assignments. Effort from subprojects is included if the **Roll up planned information from subprojects to parent task** option is selected on the project.
Actual effort (FTEs)	Actual effort in FTEs, as calculated by the last project rollup: sum of the actual effort (FTEs) for task assignments, including effort from subprojects. Actual effort for a task assignment is calculated as actual hours divided by the daily conversion factor divided by the working days for the task assignment.
Actual effort (hours)	Total actual hours as of the last project rollup. This is the sum of all actual hours from all task assignments, including assignments of subprojects under the project.
Actual finish	Finish date as of the last project rollup. This is the earliest actual finish date of all task assignments, including assignments of subprojects under the project.
Actual start	Start date as of the last project rollup. This is the earliest actual start date of all task assignments, including assignments of subprojects under the project.
Allow creation of subprojects (Y/N)	Indicates if users are allowed to create subprojects under the project
Allow non-project locations (Y/N)	Indicates if resources can select a work location that is not in the preselected work locations list for an expense.
Allow override of [Billable] status on expenses (Y/N)	Indicates if users are allowed to override the **Billable** status for expenses entered for this project.
Allow project plan editors to assign summary tasks (Y/N)	Indicates if project plan editors specified for the project are allowed to assign summary tasks to resources.
Allow project plan editors to create new tasks (Y/N)	Indicates if project plan editors specified for the project are allowed to create new tasks for the project.
Allow project plan editors to delete tasks (Y/N)	Indicates if project plan editors specified for the project are allowed to delete tasks from the project.

Column	Description
Allow project plan editors to save baselines (Y/N)	Indicates if project plan editors can save baselines for the project.
Allow project plan editors to take ownership of the project (Y/N)	Indicates if project plan editors specified for the project are allowed to transfer the ownership of a project to themselves.
Allow resources with task assignments to enter expenses (Y/N)	Indicates if resources with task assignments are allowed to enter expenses for the project.
Allow summary task assignees to add new tasks (Y/N)	Indicates if resources who have been assigned summary tasks are allowed to add new tasks to the project.
Allow summary task assignees to delete tasks (Y/N)	Indicates if resources who have been assigned summary tasks are allowed to delete tasks from the project.
Allow summary task assignees to edit associated tasks (Y/N)	Indicates if resources who have been assigned summary tasks are allowed to edit tasks of the project.
Allow summary task managers to save baselines (Y/N)	Indicates if summary task managers can save baselines for their summary tasks and subtasks.
Allow users to save task baselines without affecting higher-level tasks (Y/N)	Indicates if resources can save baselines without affecting higher-level tasks.
Alternate name	Alternate name for the project.
Associated Engagement	Engagement of the project.
Baseline effort (days)	Baseline effort in days, as calculated by the last baseline: sum of the baseline effort (days) for task assignments and for tasks without assignments. Effort from subprojects is included if the **Roll up planned information from subprojects to parent task** option is selected on the project.
Baseline effort (FTEs)	Baseline effort in FTEs, as calculated by the last baseline: sum of the baseline effort (FTEs) for task assignments and for tasks without assignments. Effort from subprojects is included if the **Roll up planned information from subprojects to parent task** option is selected on the project.
Baseline effort (hours)	Baseline effort for the project in hours. This number is captured using the baseline functionality in Changepoint, or obtained from the MSP interface (if the MSP project has baseline information).

Column	Description
Baseline finish	Baseline finish date for the project. This date is captured using the baseline functionality in Changepoint, or obtained from the MSP interface (if the MSP project has baseline information).
Baseline start	Baseline start date for the project. This date is captured using the baseline functionality in Changepoint, or obtained from the MSP interface (if the MSP project has baseline information).
Billable (Y/N)	Indicates if the project is billable.
Billing office	Billing role associated with the engagement for which the project has been created.
Billing contact	Contact at the customer organization who will receive the invoices related to the project.
Comments	Comments about the project.
Cost center	Cost center that is used for the project
Count	Metric to perform data aggregation.
CP project type	Changepoint-specific project type specified for the project.
Created by	Resource who created the project.
Created on	Date the project was created.
Created on	Date the project baseline was created.
Critical path (Y/N)	The path through the project which has the least amount of total slack time.
Currency	Project currency.
Currency code	Project currency code.
Current phase	Current phase of the project, which is the latest phase during which a task of the project has started (that is, time has been entered for the task). The project rollup will calculate and populate this value into the database for each project.
Customer	Customer associated with the project.
Default work code	Default work code for the project.
Default work location	Default work location for the project.
Delegated secondary time approver	Delegated secondary approver for project time.
Delegated time approver	Delegated approver for project time.
Deleted (Y/N)	Indicates if the project has been deleted

Column	Description
Display MSP WBS in tree view (Y/N)	Indicates if the Microsoft Project work breakdown structure (WBS) number for a task displays before the task name in the **Projects** tree view.
Display subprojects in the project tree view (Y/N)	Indicates if subprojects are displayed in the **Projects** tree view.
Engagement currency	Currency of the engagement associated with the project was created, and used for invoicing.
Engagement currency code	Engagement currency code.
Expense budget	Expenses budgeted for the project.
First status date	First date a status update is required for the project.
Fiscal period selection	Billing office selected to determine which set of fiscal records to apply to the project worksheet.
Forecast finish	Forecast finish date as of the last project rollup. It is the earliest forecast finish date from all task assignments, including task assignments of subprojects created under the project.
Forecast remaining effort (days)	Remaining effort in days, as calculated by the last project rollup: sum of the remaining effort (days) for task assignments and for tasks without assignments and subprojects.
Forecast remaining effort (FTEs)	Remaining effort in FTEs, as calculated by the last project rollup: sum of the remaining effort (FTEs) for task assignments and for tasks without assignments and subprojects.
Forecast remaining effort (hours)	Remaining effort in hours, as of the last project rollup. This number is the sum of forecast remaining hours of all task assignments, including task assignments of any subprojects created under the project.
Forecast start	Forecasted start date as of the last project rollup. This date is the earliest forecasted start date for all task assignments, including task assignments of any subprojects created under the project.
Inherit project manager (Y/N)	Indicates if the project manager was inherited from the source project (if the project data was copied from an existing project)
Labor budget	Effort budgeted for the project
Other budget	Other expenses budgeted for the project

Column	Description
Planned effort (days)	Planned effort in days, as calculated by the last project rollup: sum of the planned effort (days) for task assignments and for tasks without assignments. Effort from subprojects is included if the **Roll up planned information from subprojects to parent task** option is selected on the project.
Planned effort (FTEs)	Planned effort in FTEs, as calculated by the last project rollup: sum of the planned effort (FTEs) for task assignments and for tasks without assignments. Effort from subprojects is included if the **Roll up planned information from subprojects to parent task** option is selected on the project.
Planned effort (hours)	Planned hours for the project, as entered by the project manager or as of the last project rollup.
Planned finish	Planned finish date of the project, as entered by the project manager or as of the last project rollup.
Planned remaining effort (days)	Sum of planned effort (in days) in the current and future fiscal periods.
Planned remaining effort (FTEs)	Sum of planned effort (in FTEs) in the current and future fiscal periods.
Planned remaining effort (hours)	Sum of planned effort (in hours) in the current and future fiscal periods.
Planned start	Planned start date of the project, as entered by the project manager or as of the last project rollup.
Primary product	Product marked as the primary product for the project.
Profile link	
Project contact	Contact in the company for which the project is created.
Project currency	Currency used for the project.
Project manager	Project manager responsible for the project.
Project manager	Project manager.
Project name	Project name.
Project status	Current status of the project (Active, Inactive, Complete, etc.).
Project time approver	Approver for project time (for project-level time approval).
Project value	Monetary value of the project.
Project worksheet in use (Y/N)	Indicates if the project worksheet is in use.

Column	Description
Project-level time approval enabled (Y/N)	Indicates if time approval has been enabled at project-level (that is, time approvers have been specified for the project).
Proposed phase	Project phase the project should currently be working towards. If project workflow is enabled, the field displays the workflow process currently in progress.
Related opportunity	Opportunity from which the project originated (if the project was created from an opportunity).
Related request number	Number of the request from which the project originated (if the project was created from on a request).
Revenue adjustment amount	Revenue adjustment amount for the project, as calculated in the revenue recognition process.
Revenue recognized amount	Recognized amount of revenue for the project, as calculated during the revenue recognition process.
Revenue tentative amount	Revenue tentative amount for the project, as calculated during the revenue recognition process.
Roll up planned information from subprojects to parent task (Y/N)	Indicates if planned information from subprojects are rolled up to parent tasks.
Secondary project time approver	
Status required (Y/N)	Indicates if updating the task status is required for the project.
Status update frequency	If updating the task status is required for the project, frequency of the updates to be performed by resources assigned to the task.
Subproject (Y/N)	Indicates if the project is a subproject.
Updated by	Resource who last updated the project information.
Updated on	Date the project information was last updated.
User-defined project ID	User-defined project ID.
View access restrictions for requests under this project disabled (Y/N)	Indicates if restrictions to view request have been disabled (if system-wide restrictions for viewing requests have been set up by your organization).
View in Client Portal (Y/N)	Indicates if Client Portal users can view the project and its tasks, and create requests for the project.
Work performed for	Customer for whom work was performed (if this customer differs from the one billed for work).

Project baseline

Column	Description
Baseline counter	Numeric counter of the baselines created on the same day. The highest number is the latest baseline created on that day.
Baseline effort (days)	Baseline effort (days) for the specific baseline, as captured when the baseline was taken.
Baseline effort (FTEs)	Baseline effort (FTEs) for the specific baseline, as captured when the baseline was taken.
Baseline effort (hours)	Baseline hours for the project. This information is captured using the baseline functionality in Changepoint.
Baseline finish	Baseline finish date for the project. This information is captured using the baseline functionality in Changepoint.
Baseline level	Project or task level. Task level indicates only a partial baseline was done and thus this baseline will not include all tasks for the project.
Baseline number	Number assigned to each baseline, the most recent being 1 and counting 2, 3, 4 etc. from the most recent to the oldest.
Baseline start	Baseline start date for the project. This information is captured using the baseline functionality in Changepoint.
Baseline without affecting higher-level tasks (Y/N)	Indicates if task baselines are saved without affecting higher-level tasks.
Created by	Resource who created the baseline.
Created on	Date the baseline was created.
Current baseline (Y/N)	Indicates if the baseline is current or historical.
Number of baselines for the same day	Number of baselines created on the same day.
Project name	Project name.
Roll up planned information from subprojects to parent task (Y/N)	Indicates if planned information from subprojects are rolled up to parent tasks.

Project dependencies

Column	Description
Lag time	Number of days between the planned finish date of the predecessor task and the planned start date of the successor task.
Lag time in working days (Y/N)	Indicates if the lag time between linked predecessor and successor tasks is calculated based on working days.
Move successor task date (Y/N)	Indicates if the start date of the successor task can be moved to be after the finish date of predecessor tasks.
Predecessor project	Name of the predecessor project.
Predecessor task	Name of the predecessor task.
Send notification (Y/N)	Indicates if a notification will be sent if the start date of the successor task is moved or requires adjustment (that is, when **Move successor task date** is set to **No**).
Successor project	Name of the successor project.
Successor task	Name of the successor task.
Successor task can start anytime after the finish date of the predecessor task (Y/N)	Indicates if the successor task can start anytime after the finish date of predecessor task.
Successor task must start on working days (Y/N)	Indicates if the planned start date of successor tasks must be on a working day.
Type	Type of dependency: • 0 = intra-project dependency. Two tasks within the same project are linked. • 1 = inter-project dependency. Two tasks from 2 different projects are linked.

CHAPTER 19
Requests

Requests

Column	Description
Asset	Asset associated to the request.
Assignment	Queue or resource to whom the request is assigned.
Billing type	Billing type of the request (billable or not), depending on the request type.
Category	Request category.
Closed by	Resource who closed the request.
Closed on	Date the request was closed. If the request was closed several times after having been re-opened, the latest close date is displayed.
Count	Metric to perform data aggregation.
Created by	Resource who created the request.
Created in time zone (GMT offset)	Time zone in which the request was created.
Created on	Date and time the request profile was created.
Customer	Organization for which the request was created.
Date required	Date by which the request must have been completed.
Description	Description of the request.
Details	Details of the request.
Engagement	Engagement associated with the request.
Engagement currency	Engagement currency.
Engagement currency code	Engagement currency code.
Estimated hours	Estimated hours required to complete the request.
Expense cost	Estimated cost of expenses that may incur to complete the request.
Initiator	Resource or contact who initiated the request.

Column	Description
Originating request	If the current request is created from an existing request, number of the originating request.
Product	Product associated with the request.
Product cost	Estimated product cost that will incur to complete the request.
Profile link	
Project	Project associated with the request.
Project Manager	
Quantity	Quantity of products that will be billed to the customer (for work requests related to engagements with the billing type **Effort and product**.
Reason	Reason the problem occurred or the work specified in the request is needed.
Reference number	Customer's reference number for the request.
Request age	Number of days between the opening and closing of the request.
Request number	System-defined request number.
Request priority	Level of priority assigned to the request.
Request status	Current status of the request.
Request type	Request type (bug report, feature request, change request, etc.).
Resolution	Information about the resolution of the request.
Resolution hours	Resolution time from the moment the request is logged until it is closed.
Resolution outside SLA parameters (Y/N)	Indicates the resolution took place outside the specified SLA time frame.
Response hours	Response time from the moment the request is logged until it is first edited.
Response outside SLA parameters (Y/N)	Indicates if the response was given outside the specified SLA time frame.
Responsible	Resource who is responsible for the resolution or follow-up (that is, the owner of the request).
Service level agreement	Service level agreement information specified for the request.
Services cost	Estimated service-related costs required to complete the work.
SLA 24x7 (Y/N)	Indicates if support is available 24 hours a day and 7 days a week to process the request.

Column	Description
SLA end day	End day of the request processing period, if the request does not have 24/7 support.
SLA end time	End time of the request processing period, if the request does not have 24/7 support.
SLA escalation hours	Number of hours after which the request will be escalated, if the support desk or the assigned resource does not respond or close the request.
SLA on-site (Y/N)	Indicates if on-site support is provided.
SLA request type	Type of request to which the SLA settings apply.
SLA resolution hours	Number of hours in which the support desk or the assigned resource is expected to resolve the request.
SLA resolution hours remaining	Number of hours remaining to resolve to the request, based on the SLA settings.
SLA response hours	Number of hours in which the support desk or the assigned resource is expected to respond to a request.
SLA response hours remaining	Number of hours remaining to respond to the request, based on the SLA settings.
SLA start day	Start day of the request processing period, if the request does not have 24/7 support.
SLA start time	Start time of the request processing period, if the request does not have 24/7 support.
SLA time zone	Time zone of the SLA period.
Subcategory	Request subcategory.
Support desk	Support desk in charge of the request.
Suspended (Y/N)	Indicates if the request was suspended.
Updated by	Resource who last updated the request.
Updated on	Date and time the request was last updated.
Valid SLA (Y/N)	Indicates if a valid service level agreement is in place for the product associated with the request

Request Demand

Column	Description
Added to calendar (Y/N)	Indicates if the request demand was added to the calendar
Count	
Created by	Name of the resource who created the request demand
Created on	Date and time the request demand was created
Daily conversion factor	Daily conversion factor stored against the request demand record, used to calculate effort in FTEs and days
Effort (days)	Estimated effort in days for the request demand record
Effort (FTEs)	Estimated effort in FTEs for the request demand record
Effort (hours)	Estimated effort in hours to complete the work on the request
End date	Date the resource will complete the work for the request
Function name	Job function of the resource that will work on the request
Request number	System-defined number assigned to the request
Resource name	Resource who will work on the request
Shown on time sheet (Y/N)	Indicates if the request demand is shown on the time sheet
Soft-booked (Y/N)	Indicates if the request demand is soft-booked
Start date	Date the resource will start working on the request
Updated by	Name of the resource who updated the request demand information
Updated on	Date and time the request demand information was last updated
Workgroup name	Workgroup from which a resource is requested. If a specific resource has been specified by name, the field displays automatically the workgroup of this resource.
Working days	Number of working days stored against the request demand record. FTE are calculated using this number.

CHAPTER 20
Resources

Resources

Column	Description
Address	Business address of the resource.
Allow daily time to be submitted out of sequence (Y/N)	Indicates if the resource can enter time in any order (for instance, Monday, Wednesday, Tuesday) instead of following the chronological order (Monday, Tuesday, Wednesday, etc.).
Allow user to create or modify personal portals (Y/N)	Indicates if resources can create and modify personal templates.
Alternate name	Alternate name of the resource.
Base currency	Base currency of the resource.
Base currency description	Base currency description.
City	
Cost center	Cost center of the resource.
Count	
Country	
Created by	Resource who created the resource profile.
Created on	Date and time the resource profile was created.
Daily capacity	Number of hours in a working day (used for demand and capacity calculation).
Daily conversion factor	Daily conversion factor, used to calculate effort in FTEs and days.
Deleted (Y/N)	Indicates if the resource profile was deleted.
Description	Description of the resource's job function.
Earliest time entry	Earliest time entry by the resource.
Email	Email address of the resource.

Column	Description
Exempt from resource requests (Y/N)	Indicates if resources are exempt from being assigned to tasks and project team entries even when resource requests are enabled.
Fax number	Resource's fax number.
First name	First name of the resource.
First payroll end date	Date the time submission rules start to apply to the resource.
Function	Function of the resource.
Global workgroup	Global workgroup of the resource's workgroup.
Hire date	Date the resource was hired.
Home phone	Home phone number of the resource.
Home phone hidden from Client Portal users (Y/N)	Indicates if the resource's home phone number is hidden from Client Portal users.
Job title	Title defining the position of the resource in the organization.
Language	Language
Last name	Last name of the resource.
Last submission period	Last payroll period the resource submitted time.
License type	Resource's license type.
Licensed (Y/N)	Indicates if the resource has a license to use the Changepoint application.
Location	Business location where the resource works.
Middle name	Middle name of the resource (if available).
Mobile	Cell phone number of the resource.
Office phone	Office phone number of the resource.
Office phone extension	Office phone extension.
Pager number	Pager number of the resource.
Payroll cycle	Payment frequency of the resource.
Payroll group	Payroll group to which the resource belongs.
Payroll information updated by	Resource who last updated the payroll information.
Payroll information updated on	Date and time the resource payroll information was last updated.
Payroll lag	Number of days to be included in the payroll period.

Column	Description
Primary function	Primary job function of the resource.
Profile link	
Reports to	Direct manager of the resource.
Resource ID	ID of the resource.
Resource name	Full name of the resource.
Resource rate currency	Currency of the billing rates specified for the resource.
Resource type	Type of resource.
SSO credential	Resource's network logon name or single sign-on (SSO) credential.
State/Province	
Submission cycle	Time submission cycle.
Submission hours	Number of hours the resource is required to submit in each submission cycle.
Time zone	Time zone used by the resource.
Time zone description	Time zone description.
Updated by	Resource who last updated the resource profile.
Updated on	Date and time the resource profile was last updated.
Workgroup	Workgroup of the resource.
ZIP/Postal code	

Resource approval

Column	Description
Current expense approver	Current expense approver.
Current time approver	Current time approver.
Delegated invoice approver	Resource to whom invoice approval has been delegated.
Delegated primary expense approver	Resource to whom expense approval rights have been delegated.
Delegated second-level invoice approver	Resource to whom second-level invoice approval has been delegated.

Column	Description
Delegated secondary expense approver	Different resource in charge of approving expenses, in case the primary approver is not available.
Delegated secondary time approver	Different resource in charge of approving time, in case the primary approver is not available.
Expense approval delegated (Y/N)	Indicates if time approval has been delegated.
Original expense approver	Original expense approver, before approval rights were delegated.
Original time approver	Original time approver, before approval rights were delegated.
Resource name	Resource name.
Time approval delegated (Y/N)	Indicates if time approval has been delegated.

Resource confidential information

Column	Description
Advance balance	Amount advanced to the resource for future expenses.
Annual target Hours	Number of hours the resource is expected to work per year.
Annual vacation hours	Number of annual vacation hours for the resource.
Count	Metric to perform data aggregation.
Daily billing rate	Resources daily billing rate.
Daily cost rate	Resources daily cost rate.
Expenses	
Hourly billing rate	Resources hourly billing rate.
Hourly cost rate	Resources hourly cost rate.
Overtime billing rate	Resources billing rate for overtime.
Overtime cost rate	Resource’s cost rate for overtime.
Profile link	
Rate 1	Additional rates for the resource.
Rate 2	
Rate 3	

Column	Description
Resource name	Resource name.
Resource rate currency	Resource rate currency.
Resource rate currency code	Resource rate currency code.
Time in-lieu	Number of hours given to a resource in exchange for overtime hours worked.
Vacation carry over	Vacation time that the resource can carry over to the next year or fiscal year.

CHAPTER 21

Demand and Capacity

Demand and capacity

Column	Description
Committed calendar effort (days)	Committed calendar effort in days for each working day (effort in hours divided by the resource's daily conversion factor).
Committed calendar effort (FTEs)	Committed calendar effort in FTEs for each working day (effort in hours divided by the resource's daily conversion factor).
Committed calendar effort (hours)	Committed calendar effort in hours for each working day.
Committed opportunity services effort (days)	Committed opportunity service effort in days for each working day (effort in hours divided by the daily conversion factor for the service).
Committed opportunity services effort (FTEs)	Committed opportunity service effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the service divided by the total working days for the service).
Committed opportunity services effort (hours)	Committed opportunity service effort in hours for each working day.
Committed project team effort (days)	Committed project team effort in days for each working day (effort in hours divided by the daily conversion factor for the project team).
Committed project team effort (FTEs)	Committed project team effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the project team divided by the total working days for the project team).
Committed project team effort (hours)	Committed project team effort in hours for each working day.
Committed projected resource effort (days)	Committed projected resources effort in days for each working day (effort in hours divided by the daily conversion factor for the projected resource record).
Committed projected resource effort (FTEs)	Committed projected resources effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the projected resource record divided by the total working days for the projected resource record).
Committed projected resource effort (hours)	Total committed effort for projected resources on the specified demand date.

Column	Description
Committed request demand effort (days)	Committed request demand effort in days for each working day (effort in hours divided by the daily conversion factor for the request demand record).
Committed request demand effort (FTEs)	Committed request demand effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the request demand record divided by the total working days for the request demand record).
Committed request demand effort (hours)	
Committed task assignment effort (days)	Committed task assignment effort in days for each working day (effort in hours divided by the daily conversion factor for the task assignment).
Committed task assignment effort (FTEs)	Committed task assignment effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the task assignment divided by the total working days for the task assignment).
Committed task assignment effort (hours)	Committed task assignment effort in hours for each working day.
Count	Metric to perform data aggregation.
Function name	Function of the resource scheduled in the resource demand.
Gross capacity	Resource capacity for the day (daily capacity for each resource multiplied by the workgroup availability percent setting on the days where the resource is a member of the workgroup).
Non-committed calendar effort (days)	Non-committed calendar effort in days for each working day (effort in hours divided by the resource's daily conversion factor).
Non-committed calendar effort (FTEs)	Non-committed calendar effort in FTEs for each working day (effort in hours divided by the resource's daily conversion factor).
Non-committed calendar effort (hours)	Non-committed calendar effort in hours for each working day.
Non-committed opportunity services effort (days)	Non-committed opportunity service effort in days for each working day (effort in hours divided by the daily conversion factor for the service).
Non-committed opportunity services effort (FTEs)	Non-committed opportunity service effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the service divided by the total working days for the service).
Non-committed opportunity services effort (hours)	Non-committed opportunity service effort in hours for each working day.

Column	Description
Non-committed project team effort (days)	Non-committed task assignment effort in days for each working day (effort in hours divided by the daily conversion factor for the task assignment).
Non-committed project team effort (FTEs)	Non-committed project team effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the project team divided by the total working days for the project team).
Non-committed project team effort (hours)	Non-committed project team effort in hours for each working day.
Non-committed projected resource effort (days)	Non-committed projected resources effort in days for each working day (effort in hours divided by the daily conversion factor for the projected resource record).
Non-committed projected resource effort (FTEs)	Non-committed projected resources effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the projected resource record divided by the total working days for the projected resource record).
Non-committed projected resource effort (hours)	
Non-committed request demand effort (days)	Non-committed opportunity services effort in days for each working day (effort in hours divided by the daily conversion factor for the request demand record).
Non-committed request demand effort (FTEs)	Non-committed request demand effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the request demand record divided by the total working days for the request demand record).
Non-committed request demand effort (hours)	
Non-committed task assignment effort (days)	Non-committed task assignment effort in days for each working day (effort in hours divided by the daily conversion factor for the task assignment).
Non-committed task assignment effort (FTEs)	Non-committed task assignment effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the task assignment divided by the total working days for the task assignment).
Non-committed task assignment effort (hours)	Non-committed task assignment effort in hours for each working day.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Workgroup name	Workgroup of the resource included in the demand item.

Demand and capacity - Static

Column	Description
Committed calendar effort (days)	Committed calendar effort in days for each working day (effort in hours divided by the resource's daily conversion factor).
Committed calendar effort (FTEs)	Committed calendar effort in FTEs for each working day (effort in hours divided by the resource's daily conversion factor).
Committed calendar effort (hours)	Committed calendar effort in hours for each working day.
Committed opportunity services effort (days)	Committed opportunity services effort in days for each working day (effort in hours divided by the daily conversion factor for the service).
Committed opportunity services effort (FTEs)	Committed opportunity services effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the service divided by the total working days for the service).
Committed opportunity services effort (hours)	Committed opportunity services effort in hours for each working day.
Committed project effort (days)	Committed project task assignment effort in days for each working day (effort in hours divided by the daily conversion factor for the task assignment).
Committed project effort (FTEs)	Committed project task assignment effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the task assignment divided by the total working days for the task assignment).
Committed project effort (hours)	Committed project task assignment effort in hours for each working day.
Committed project team effort (days)	Committed project team effort in days for each working day (effort in hours divided by the daily conversion factor for the project team).
Committed project team effort (FTEs)	Committed project team effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the project team divided by the total working days for the project team).
Committed project team effort (hours)	Committed project team effort in hours for each working day.
Committed projected resource effort (days)	Committed projected resources effort in days for each working day (effort in hours divided by the daily conversion factor for the projected resource record).
Committed projected resource effort (FTEs)	Committed projected resources effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the projected resource record divided by the total working days for the projected resource record).

Column	Description
Committed projected resource effort (hours)	Committed projected resources effort in hours for each working day.
Committed request effort (days)	Committed request demand effort in days for each working day (effort in hours divided by the daily conversion factor for the request demand record).
Committed request effort (FTEs)	Committed request demand effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the request demand record divided by the total working days for the request demand record).
Committed request effort (hours)	Committed request demand effort in hours for each working day.
Count	Metric to perform data aggregation.
Function name	Function of the resource.
Gross capacity	Gross capacity
Non-committed calendar effort (days)	Non-committed calendar effort in days for each working day (effort in hours divided by the resource's daily conversion factor).
Non-committed calendar effort (FTEs)	Non-committed calendar effort in FTEs for each working day (effort in hours divided by the resource's daily conversion factor).
Non-committed calendar effort (hours)	Non-committed calendar effort in hours for each working day.
Non-committed opportunity effort (days)	Non-committed opportunity service effort in days for each working day (effort in hours divided by the daily conversion factor for the service).
Non-committed opportunity effort (FTEs)	Non-committed opportunity service effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the service divided by the total working days for the service).
Non-committed opportunity effort (hours)	Non-committed opportunity effort in hours for each working day.
Non-committed project effort (days)	Non-committed project task assignment effort in days for each working day (effort in hours divided by the daily conversion factor for the task assignment).
Non-committed project effort (FTEs)	Non-committed project task assignment effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the task assignment divided by the total working days for the task assignment).
Non-committed project effort (hours)	Non-committed project task assignment effort in hours for each working day.

Column	Description
Non-committed project team effort (days)	Non-committed project team effort in days for each working day (effort in hours divided by the daily conversion factor for the project team).
Non-committed project team effort (FTEs)	Non-committed project team effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the project team divided by the total working days for the project team).
Non-committed project team effort (hours)	Non-committed project team effort in hours for each working day.
Non-committed projected resource effort (days)	Non-committed projected resources effort in days for each working day (effort in hours divided by the daily conversion factor for the projected resource record).
Non-committed projected resource effort (FTEs)	Non-committed projected resources effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the projected resource record divided by the total working days for the projected resource record).
Non-committed projected resource effort (hours)	Non-committed projected resources effort in hours for each working day.
Non-committed request effort (days)	Non-committed request demand effort in days for each working day (effort in hours divided by the daily conversion factor for the request demand record).
Non-committed request effort (FTEs)	Non-committed request demand effort in FTEs for each working day (effort in hours divided by the daily conversion factor for the request demand record divided by the total working days for the request demand record).
Non-committed request effort (hours)	Non-committed request demand effort in hours for each working day.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Workgroup name	Workgroup of the resource included in the demand item.

Resource demand - Calendar

Column	Description
Committed (Y/N)	
Count	Metric to perform data aggregation.
Customer name	No data is displayed for calendar entries.

Column	Description
Daily conversion factor	Daily conversion factor for the calendar demand item, used to calculate effort in FTEs and days.
Function name	Function of the resource included in the resource demand.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Planned effort (days)	Planned effort in days for each demand item for each working day (effort in hours divided by the daily conversion factor for the demand item).
Planned effort (FTEs)	Planned effort in FTEs for each demand item for each working day (effort in hours divided by the daily conversion factor for the demand item).
Planned effort (hours)	Planned effort in hours for each demand item for each working day.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Sub-item name	Name of the sub-item included in the resource demand (title or description of the calendar appointment).
Type	Type of demand.
Workgroup name	Workgroup of the resource included in the demand item.

Resource demand - Opportunities

Column	Description
Committed (Y/N)	
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the opportunity
Daily conversion factor	Daily conversion factor for the opportunity service, used to calculate effort in FTEs and days.
Effort (days)	Effort in days for the opportunity service for each working day (effort in hours divided by the daily conversion factor for the service).

Column	Description
Effort (FTEs)	Estimated effort in FTEs for the opportunity service for each working day (effort in hours divided by the daily conversion factor for the service divided by the number of working days for the service).
Effort (hours)	Estimated effort in hours for the opportunity service for each working day.
Function name	Function of the resource that is included in the resource demand.
Item name	Entity and name of the resource demand item.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Sub-item name	Name of the item included in the resource demand.
Type	Type of demand.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was indicated, the field displays the staffing workgroup specified for the opportunity. If no staffing workgroup was specified, the field displays the workgroup of the sales representative.
Working days	Number of working days for the opportunity service record, used for calculated days and FTE amounts.

Resource demand - Projects

Column	Description
Committed (Y/N)	
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the project.
Daily conversion factor	Daily conversion factor for the task assignment, used to calculate effort in FTEs and days.
Effort (days)	Planned effort in days for the task assignment for each working day (effort in hours on each working day divided by the daily conversion factor for the task assignment).
Effort (FTEs)	Planned effort in FTEs for the task assignment for each working day (effort in hours divided by the daily conversion factor for the task assignment divided by the number of working days for the task assignment).

Column	Description
Effort (hours)	Planned effort in FTEs for the task assignment for each working day.
Function name	Function of the resource included in the resource demand.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Status not required (Y/N)	Indicates that the task status update is not required.
Sub-item name	Sub-item included in the resource demand (name of the project)
Type	Type of demand.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was specified, the column displays the staffing workgroup specified for the engagement associated with the project. If no staffing workgroup was specified, the column displays the workgroup of the engagement manager.

Resource demand - Projected resources

Column	Description
Committed (Y/N)	Indicates if the time of the demand item has been committed.
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the project.
Daily conversion factor	Daily conversion factor for the project team record, used to calculate effort in FTEs and days.
Estimated effort (days)	Estimated effort in days for the projected resource record (effort in hours divided by the daily conversion factor for the projected resource record).
Estimated effort (FTEs)	Estimated effort in FTEs for the projected resource record (effort in hours divided by the daily conversion factor for the project team record divided by the number of working days for the projected resource record).
Estimated effort (hours)	Estimated effort in hours for the projected resource record.

Column	Description
Function name	Function of the resource included in the resource demand.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Number of working days	Number of working days for the project team record, used to calculate effort in FTEs.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Sub-item name	Sub-item included in the resource demand.
Type	Indicates the demand type.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was specified, the column displays the staffing workgroup specified for the engagement associated with the project. If no staffing workgroup was specified, the column the workgroup of the engagement manager.

Resource demand - Project teams

Column	Description
Committed (Y/N)	Indicates if the time of the demand item has been committed.
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the project.
Daily conversion factor	Daily conversion factor for the project team record, used to calculate effort in FTEs and days.
Function name	Function of the resource included in the resource demand.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Number of working days	Number of working days for the project team record, used to calculate effort in FTEs.
Project team estimated effort (days)	Estimated effort in days for the project team record (effort in hours divided by the daily conversion factor for the project team record).

Column	Description
Project team estimated effort (FTEs)	Estimated effort in FTEs for the project team record (effort in hours divided by the daily conversion factor for the project team record divided by the number of working days for the project team record).
Project team estimated effort (hours)	Estimated effort in hours for the project team record.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Sub-item name	Sub-item included in the resource demand
Type	Indicates the demand type.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was specified, the column displays the staffing workgroup specified for the engagement associated with the project. If no staffing workgroup was specified, the column displays the workgroup of the engagement manager.

Resource demand - Request demand

Column	Description
Committed (Y/N)	Indicates if the time of the demand item has been committed.
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the request.
Daily conversion factor	Daily conversion factor for the request, used to calculate effort in FTEs and days.
Function name	Function of the resource included in the resource demand.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Number of working days	Number of working days for the request demand record, used to calculate effort in FTEs.
Request demand effort (days)	Request demand effort in days (effort in hours divided by the daily conversion factor for the request demand record).

Column	Description
Request demand effort (FTEs)	Request demand effort in FTEs (effort in hours divided by the daily conversion factor for the request demand record divided by the number of working days for the request demand record).
Request demand effort (hours)	Request demand effort in hours.
Resource demand date	Date the demand is distributed to (any working day between the start and finish dates for the demand item).
Resource name	Resource included in the demand item.
Sub-item name	Sub-item included in the resource demand.
Type	Indicates the demand type.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was specified, the column displays the staffing workgroup specified in the resource demand information of the request. If no staffing workgroup was specified, the column is empty.

Resource demand

Column	Description
Committed (Y/N)	Indicates if the resource demand item has been committed.
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the demand item.
Demand date	Date associated with the demand.
Estimated Effort (days)	Resource demand effort in days.
Estimated Effort (FTEs)	Resource demand effort in FTEs.
Estimated Effort (hours)	Resource demand effort in hours.
Function name	Function of the resource included in the resource demand.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Item type	Entity type code “PRJ” (project), “ENG” (engagement), or “OPP” (opportunity).
Resource name	Resource scheduled in the resource de and.

Column	Description
Sub-item name	Sub-item included in the resource demand.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was specified, the column displays the staffing workgroup specified in the resource demand information. If no staffing workgroup was specified, the column is empty.

Resource demand all days

Column	Description
Committed (Y/N)	Indicates if the resource demand item has been committed.
Count	Metric to perform data aggregation.
Customer name	Company/customer associated with the demand item.
Demand date	Date associated with the demand.
Estimated Effort (days)	Resource demand effort in days.
Estimated Effort (FTEs)	Resource demand effort in FTEs.
Estimated Effort (hours)	Resource demand effort in hours.
Function name	Function of the resource included in the resource demand.
Include in resource demand (Y/N)	Indicates if the task assignment is included as demand item in resource demand analysis.
Included in histogram (Y/N)	Indicates if the resource demand is included in the histogram.
Item name	Entity and name of the resource demand item.
Item type	Entity type code “PRJ” (project), “ENG” (engagement), or “OPP” (opportunity).
Locked task (Y/N)	Indicates if the task is locked to prevent resources from booking time against it.
Percent complete	Percent of work completed, entered by the resource when updating the task status, or calculated by the system as follows: Actual hours / (Actual hours + Remaining hours).
Planned finish	Planned finish date for the task.
Resource name	Resource scheduled in the resource de and.

Column	Description
Sub-item name	Sub-item included in the resource demand.
Workgroup name	Workgroup of the resource included in the demand item. If no resource was specified, the column displays the staffing workgroup specified in the resource demand information. If no staffing workgroup was specified, the column is empty.

CHAPTER 22
Resource Requests

Resource requests from projected resources

Column	Description
Billing office	Billing office of the engagement from which the resource request was initiated.
Billing role	Billing role specified on the resource request.
Comments	Comments about the resource request.
Created by	Resource who created the resource request.
Created on	Date and time the resource request was created.
Current status	Current status of the resource request.
Customer	Customer associated with the engagement.
Engagement	Engagement from which the resource request was initiated.
Engagement manager	Engagement manager.
Engagement manager workgroup	Engagement manager workgroup.
Estimated effort (days)	Estimated effort (in days) for the projected resource.
Estimated effort (FTEs)	Estimated effort (in FTEs) for the projected resource.
Estimated effort (hours)	Estimated effort (in hours) for the projected resource.
Finish date	Estimated finish date for the projected resource.
Function	Function of the requested resource.
Initiator	Initiator of the resource request.
Level of request initiation	Level at which the resource request was initiated.
Manager workgroup	Workgroup of the resource manager responsible for processing the resource request.
Projected resource	Resource specified in the projected resource record.
Projected resource record created by	Resource who created the projected resource record.
Projected resource record created on	Date and time the projected resource record was created.

Column	Description
Projected resource record updated by	Resource who last updated the projected resource record.
Projected resource record updated on	Date and time the projected resource record was last updated.
Projected resource unique ID	ID of the projected resource.
Requested (Y/N)	Indicates if the projected resource record is associated with a resource request.
Requested resource ID	ID of requested resource.
Requested resource name	Resource included in the projected resource record.
Resource manager	Resource responsible for processing the resource request.
Resource request number	Resource request number.
Soft-booked (Y/N)	Indicates if the time for the resource is soft-booked (not committed yet).
Staffed (Y/N)	Indicates if a resource has been assigned to perform the work.
Staffing workgroup	Staffing workgroup of the engagement.
Start date	Planned start date for the projected resource.
Task created (Y/N)	Indicates if a task has been created for the resource.
Updated by	Resource who last updated the resource request.
Updated on	Date and time the resource request was last updated.

Resource requests from project teams

Column	Description
Billing office	Billing office of the engagement associated with the project.
Billing role	Billing role specified on the resource request.
Comments	Comments about the resource request.
Created by	Resource who created the resource request.
Created on	Date and time the resource request was created.
Current status	Current status of the resource request.

Column	Description
Customer	Customer associated with the project.
Engagement	Engagement associated with the project.
Engagement manager	Engagement manager.
Engagement manager workgroup	Engagement manager workgroup.
Estimated effort (days)	Estimated effort (in days) for the resource in the project team.
Estimated effort (FTEs)	Estimated effort (in FTEs) for the resource in the project team.
Estimated effort (hours)	Estimated effort (in hours) for the resource in the project team.
Finish date	Planned finish date for the resource in the project team.
Function	Function of the requested resource.
Initiator	Initiator of the resource request.
Level of request initiation	Level at which the resource request was initiated.
Manager workgroup	Workgroup of the resource manager responsible for processing the resource request.
Project	Project name from which the resource request was initiated.
Project team record created by	Resource who created the project team record.
Project team record created on	Date and time the project team record was created.
Project team record updated by	Resource who last updated the project team record.
Project team record updated on	Date and time the project team record was last updated.
Projected resource	Resource specified in the project team record.
Requested resource ID	ID of requested resource.
Requested resource name	Name of requested resource.
Resource manager	Resource responsible for processing the resource request.
Resource request number	Resource request number.
Soft-booked (Y/N)	Indicates if the time for the resource is soft-booked (not committed yet).
Staffed (Y/N)	Indicates if a resource has been assigned to perform the work.
Staffing workgroup	Staffing workgroup of the engagement.

Column	Description
Start date	Planned start date for the resource.
Updated by	Resource who last updated the resource request.
Updated on	Date and time the resource request was last updated.

Resource requests from task assignments

Column	Description
Billing office	Billing office of the engagement associated with the task.
Billing role	Billing role specified on the resource request.
Comments	Comments about the resource request.
Created by	Resource who created the resource request.
Created on	Date and time the resource request was created.
Current status	Current status of the resource request.
Customer	Customer associated with the task.
Engagement	Engagement.
Engagement manager	Engagement manager.
Engagement manager workgroup	Engagement manager workgroup.
Function	Function of the requested resource.
Initiator	Initiator of the resource request.
Level of request initiation	Level at which the resource request was initiated.
Manager workgroup	Workgroup of the resource manager responsible for processing the resource request.
Planned finish	Planned finish for the task assignment.
Planned remaining effort (days)	Planned remaining effort in days for the task assignment.
Planned remaining effort (FTEs)	Planned remaining effort in FTEs for the task assignment.
Planned remaining effort (hours)	Planned remaining effort in hours for the task assignment.
Planned start	Planned start for the task assignment.

Column	Description
Projected resource	Resource specified in the task assignment.
Requested resource ID	ID of the requested resource
Requested resource name	Name of requested resource.
Resource manager	Resource responsible for processing the resource request.
Resource request number	Resource request number.
Soft-booked (Y/N)	Indicates if the time for the resource is soft-booked (not committed yet).
Staffed (Y/N)	Indicates if a resource has been assigned to perform the work.
Staffing workgroup	Staffing workgroup of the engagement.
Task assignment created by	Resource who created the task assignment.
Task assignment created on	Date and time the task assignment was created.
Task assignment updated by	Resource who last updated the task assignment.
Task assignment updated on	Date and time the task assignment was last updated.
Task name	Task name (if a task was created for the resource request).
Updated by	Resource who last updated the resource request.
Updated on	Date and time the resource request was last updated.

CHAPTER 23
Tasks

Tasks

Column	Description
Actual effort (days)	Actual effort in days for all task assignments and subprojects, as calculated by the last project rollup.
Actual effort (FTEs)	Actual effort in FTEs for all task assignments and subprojects, as calculated by the last project rollup.
Actual effort (hours)	Actual effort in hours for all task assignments and subprojects, as calculated by the last project rollup.
Actual finish	Earliest actual finish date from all task assignments and subprojects, as calculated by the last project rollup.
Actual start	Earliest actual start date from all task assignments and subprojects, as calculated by the last project rollup.
Allow work code override (Y/N)	Indicates if resources reporting time for the task are allowed to select another work code than the default work code set for the task.
Allow work location override (Y/N)	Indicates if resources reporting time for the task are allowed to select another work location than the default work location set for the task.
Assigned on	
Assignment planned effort (days)	Effort in days that will be applied to all task assignments that are automatically created when time is entered for an open task.
Assignment planned effort (FTEs)	Effort in FTEs that will be applied to all task assignments that are automatically created when time is entered for an open task.
Assignment planned effort (hours)	Effort in hours that will be applied to all task assignments that are automatically created when time is entered for an open task.
Baseline effort (days)	Baseline effort in days.
Baseline effort (FTEs)	Baseline effort in FTEs.
Baseline effort (hours)	Baseline effort in hours (captured using the baseline functionality in Changepoint, or obtained from the MSP interface, if the MSP project has baseline information).

Column	Description
Baseline finish	Baseline finish date for the task.
Baseline start	Baseline start date for the task.
Billable (Y/N)	Indicates if the task-related work is billable.
Billing office	Billing office of the engagement associated with the task.
Billing role	Default billing role of the resource assigned to the task, used to determine the billing rate.
Capital (Y/N)	Indicates if the task is marked as a capital cost.
Company	Company/customer of the engagement associated with the task.
Completed (Y/N)	Indicates if the task has been completed.
Created on	Date the task was created.
Critical (Y/N)	Indicates if the finish date of the task affects the critical path of the project.
Daily conversion factor	Daily conversion factor, used to calculate effort in FTEs and days.
Deleted (Y/N)	Indicates if the task has been deleted.
Engagement currency	Engagement currency, used for invoicing.
Engagement currency code	Engagement currency code.
Engagement name	Engagement name.
Fixed fee (Y/N)	Indicates if the time worked on the task will be billed towards the fixed fee portion of the engagement.
Fixed-fee deliverable	Fixed fee towards which the time worked on the task will be billed.
Forecast finish	Earliest forecast finish date from all task assignments and subprojects, as calculated by the last project rollup.
Forecast remaining effort (days)	Remaining effort in days for task assignments and subprojects, as of the last project rollup.
Forecast remaining effort (FTEs)	Remaining effort in FTEs for task assignments and subprojects, as of the last project rollup.
Forecast remaining effort (hours)	Remaining effort in hours for task assignments and subprojects, as of the last project rollup.
Forecast start	Earliest forecast start date from all task assignments and subprojects, as calculated by the last project rollup.
Function	Function of the resource assigned to the task.

Column	Description
Include in resource demand (Y/N)	Indicates if the task is included as demand item in resource demand analysis.
Lag days	Time interval between linked tasks.
Locked task (Y/N)	Indicates if the task is locked to prevent resources from entering time for it.
Milestone (Y/N)	Indicates if the task is identified as a milestone in the project Gantt chart.
MSP WBS number	Microsoft Project WBS field value. This value only displays if the project has been linked to Microsoft Project.
Number of working days	Number of working days for the task, used to calculate FTEs if no task assignments exist for the task.
Open task (Y/N)	Indicates if the task is an open task.
Phase	Project phase that the task applies to.
Planned effort (days)	If no task assignments exist, planned effort in days (planned hours divided by the daily conversion factor) If task assignments exist, the planned effort is the sum of effort for all task assignments.
Planned effort (FTEs)	If no task assignments exist, planned effort in FTEs (planned hours divided by the daily conversion factor divided by the number of working days between the task planned start and planned finish dates). If task assignments exist, the planned effort is the sum of effort for all task assignments.
Planned effort (hours)	If no task assignments exist, planned effort in hours. If task assignments exist, the planned effort is the sum of effort for all task assignments.
Planned finish	Planned finish date specified for the task.
Planned remaining effort (days)	Planned remaining effort in days for the current and future fiscal periods.
Planned remaining effort (FTEs)	Planned remaining effort in FTEs for the current and future fiscal periods.
Planned remaining effort (hours)	Planned remaining effort in hours for the current and future fiscal periods
Planned start	Planned start date of the task.
Primary product	Primary product for the project under which the task was created.
Product ready to invoice	Product ready to invoice
Profile link	

Column	Description
Project name	Project under which the task was created.
Project Phase	Phase of the project under which the task was created.
Related request number	Request from which the task originated.
Revenue adjustment	Revenue adjustment amount for the task, as calculated during the revenue recognition process.
Revenue recognized amount	Recognized amount of revenue for the task, as calculated during the revenue recognition process.
Revenue tentative amount	Revenue tentative amount for the project, as calculated during the revenue recognition process.
Slack	Amount of time that a task can slip before it affects another task or the finish date of the project.
Staffed (Y/N)	Indicates if a resource has been assigned to perform the work. ‘0’ indicates that task assignments have been created for the task or that the task is a summary task (does not require staffing).
Status update not required (Y/N)	Indicates that the task status update is not required.
Summary task (Y/N)	Indicates if the task is a summary task.
Task description	Task description.
Task name:	Task name.
Updated on	Date the task was last updated.
Utilization eligible (Y/N)	Indicates if the time spent on the task is included in the utilization calculation of the assigned resources.
WBS number	Changepoint-defined WBS value for the task.
WBS order	Order in which the tasks are sorted in the **Projects** tree view.
Work code	Work code for the task.
Work code category	Work code category for the task.
Work location	Work location for the task.
Work location group	Work location group for the task.
Work performed for	Customer for whom work is performed (if this customer differs from the one billed for the work).
Workflow history details	

Task baseline

Column	Description
Allow users to save task baselines without affecting higher-level tasks (Y/N)	Indicates if resources can save baselines without affecting higher-level tasks.
Baseline counter	Numeric counter of the baselines created on the same day.
Baseline effort (days)	Baseline effort in days for the task.
Baseline effort (FTEs)	Baseline effort in FTEs for the task.
Baseline effort (hours)	Baseline effort in hours for the task.
Baseline finish	Baseline finish date for the task.
Baseline level	Task level indicates only a partial baseline was done and thus the baseline does not include all tasks for the project.
Baseline number 1	
Baseline start	Baseline start date for the task.
Created by	Resource who created the task.
Created on	Date and time the task was created.
Current baseline (Y/N)	Indicates if the baseline is current or historical.
Number of baselines for the same day	Number of baselines created on the same day.
Planned information rollup (Y/N)	Indicates if planned start, planned finish and planned hours have been rolled up from subprojects to the parent project task.
Project	Project of the task.
Task name	Task name.

CHAPTER 24
Tasks assignments

Task assignments

Column	Description
Actual effort (days)	Actual effort in days for the task assignment (actual effort in hours divided by the daily conversion factor of the task assignment).
Actual effort (FTEs)	Actual effort in FTEs for the task assignment (actual effort in hours divided by the daily conversion factor of the task assignment, divided by the number of working days of the task assignment).
Actual effort (hours)	Actual effort in hours for the task assignment.
Actual finish	Last day the resource reported time for the task in the time sheet or marked the task as complete.
Actual start	First day the resource reports time against the task in the time sheet.
Allow work code override (Y/N)	Indicates if resources reporting time for the task are allowed to select another work code than the default work code set for the task.
Allow work location override (Y/N)	Indicates if resources reporting time for the task are allowed to select another work location than the default work location set for the task.
Baseline effort (days)	Baseline effort in days for the task assignment.
Baseline effort (FTEs)	Baseline effort in FTEs for the task assignment.
Baseline effort (hours)	Baseline effort in hours for the task assignment.
Baseline finish	Baseline finish date for the task assignment.
Baseline resource assigned	Baseline resource assigned for the task assignment.
Baseline start	Baseline start date for the task assignment.
Billing office	Billing office of the engagement associated with the task.
Billing role	Default billing role of the resource assigned to the task (used to determine the resource's billing rate.
Cost currency	Cost currency.

Column	Description
Cost currency code	Cost currency code.
Cost rate update	Date the cost rates were updated (after the **`UpdateTimeRates`** scheduled job has been run).
Cost to date	Cost of the effort spent on the task as of the date the scheduled job **UpdateTimeRates** has been run. This field is used by the MSP interface, and represents the actual cost for the task assignment, based on hours multiplied by the cost rate that is populated in the time table.
Created by	Resource who created the task assignment.
Created on	Date and time the task assignment was created.
Current baseline (Y/N)	Indicates if the baseline is current or historical.
Customer	Company/customer specified in the engagement under which the task was created.
Daily conversion factor	Number of hours to be used to convert time records from hours to days or FTEs, and back.
Default work code	Default work code of the task assignment.
Default work location	Default work location of the task assignment.
Deleted (Y/N)	Indicates if the task assignment has been deleted.
Engagement	Engagement associated with the task.
Forecast finish	Forecasted finish date, entered by the resource when updating the task status.
Forecast start	Forecasted start date, as entered by the resource when updating the task status.
Function	Default job function of the resource assigned to the task.
Impacted by nonworking day (Y/N)	Indicates if the task assignment is impacted by nonworking days.
Include in resource demand (Y/N)	Indicates if the task assignment is included as demand item in resource demand analysis.
Loading method	Method selected for the task to determine how planned hours will be distributed across fiscal periods: **Auto-update** or **Manual**.
Locked task (Y/N)	Indicates if the task is locked to prevent resources from booking time against it.
Manager comment	Comments entered by the project manager when updating the task.
Number of working days	Number of working days for the task assignment, used to calculate FTE amounts.

Column	Description
Number of working days remaining	Number of remaining working days for the task assignment record, used to calculate remaining FTE amounts.
Percent complete	Percent of work completed, entered by the resource when updating the task status, or calculated by the system as follows: Actual hours / (Actual hours + Remaining hours).
Pinned to time sheet (Y/N)	Indicates if the assigned resource has selected the task as a default task in the time sheet.
Planned effort (days)	Planned effort in days for the task assignment (planned effort in hours divided by the daily conversion factor of the task assignment).
Planned effort (FTEs)	Planned effort in FTEs for the task assignment (planned effort in hours divided by the daily conversion factor of the task assignment divided by the number of working days stored of the task assignment).
Planned effort (hours)	Planned effort in hours for the task assignment.
Planned finish	Planned finish date for the task.
Planned remaining effort (days)	Total effort (in days) for the current and future fiscal periods.
Planned remaining effort (FTEs)	Total effort (in FTEs) for the current and future fiscal periods.
Planned remaining effort (hours)	Total effort (in hours) for the current and future fiscal periods.
Planned start	Planned start date for the task
Project	Project under which the task has been created.
Remaining effort (days)	Remaining effort in days for the task assignment (remaining effort in hours divided by the daily conversion factor of the task assignment).
Remaining effort (FTEs)	Remaining effort in FTEs for the task assignment (remaining effort in hours divided by the daily conversion factor of the task assignment record divided by the number of working days of the task assignment).
Remaining effort (hours)	Remaining effort in hours for the task assignment.
Request number	Request that is associated to the task assignment.
Resource	Resource assigned to the task.
Resource comment	Comments entered by the assigned resource when updating the task.
Resource request number	Resource request created for the task assignment.

Column	Description
Soft-booked	Indicates if the time scheduled for resource is soft-booked (not committed).
Staffed (Y/N)	Indicates if resources have been assigned to the task.
Status date	Date the status of the task was last updated by the assigned resource.
Status update not required (Y/N)	Indicates that task status update is not required.
Status updated (Y/N)	Indicates if the task status has been updated.
Task name	Task name.
Task status	Task status: Active (A), Completed (C) or Not Started (null).
Updated by	Resource who last updated the task assignment.
Updated on	Date and time the task assignment was last updated.
Work code category	Work code category for the task.
Work location group	Work location group for the task.
Work performed for	Customer for whom work was performed (if this customer differs from the one billed for the work).
Workgroup name	Workgroup of the assigned resource.

Task assignment baseline

Column	Description
Allow users to save task baselines without affecting higher-level tasks (Y/N)	
Baseline counter	
Baseline effort (days)	
Baseline effort (FTEs)	
Baseline effort (hours)	
Baseline finish	
Baseline level	
Baseline resource assigned	

Column	Description
Baseline start	
Created by	
Created on	
Current baseline (Y/N)	
Number of baselines for the same day	
Planned information rollup (Y/N)	
Project	
Resource name	
Task assignment baseline number	
Task name	

CHAPTER 25
Time

Time combined

Note: There are no pre-defined date filters for this provider. To improve performance for large data volumes, create custom filters in Cognos to filter the data by date or by other criteria.

Column	Description
Approval status	Status of the time record in the approval process.
Billable (Y/N)	Indicates if the time entry can be billed.
Created by	Resource who created the time record.
Created on	Date the time record was created (which may be different than the date of the time entry).
Customer	Customer/company associated with the time record (applicable to project time and request time, and not applicable to non-project time).
Engagement	Engagement associated with the time record (applicable to project time and request time, and not applicable to non-project time).
Fixed fee name	Fixed fee associated with the time record.
Global workgroup	Global workgroup of the resource associated with the time record.
Invoice status	Invoice status of the time record: • 0 = Not invoiced • 1 = Invoiced • 3 = Excluded from billing
Overtime effort (days)	Overtime effort in days (overtime hours divided by the daily conversion factor for the time record).
Overtime effort (hours) entered	Overtime effort in hours.
Project	Project for which the time was entered.
Recognized (Y/N)	Indicates if the time entered has been recognized through the revenue recognition process.

Column	Description
Regular effort (days)	Regular effort in days (regular hours divided by the daily conversion factor for the time record).
Regular effort entered (hours)	Regular effort in hours.
Request project	(For request time only) Project associated to the request for which time was entered.
Resource name	Resource who entered the time.
Submitted on	Date the time was submitted.
Task name	Task for which the time was entered.
Time description	Description of the work associated with the time entry.
Time entry date	Date of the time entry.
Time status	Status of the time entry. A blank field indicates that the time has been entered in the time sheet, but not submitted yet.
Time type	Type of the time entry: project time, non-project time, or request time.
Utilized (Y/N)	Indicates if the time affects the utilization of resources.
Work code	Work code specified for the time entry in the time sheet.
Work location	Work location specified for the time entry in the time sheet.
Workgroup	Workgroup of the resource associated with the time (that is, workgroup the resource belonged to at the time of the entry).

Project time

Column	Description
Account type	Account type of the customer associated with the project.
Adjusted overtime effort (days)	Adjusted overtime effort in days (adjusted overtime hours divided by the daily conversion factor for the time record).
Adjusted overtime effort (hours)	Adjusted overtime effort in hours.
Adjusted regular effort (days)	Adjusted regular effort in days (adjusted regular hours divided by the daily conversion factor for the time record).

Column	Description
Adjusted regular effort (hours)	Adjusted regular effort in hours. For example, if an original time entry of 8 hours was adjusted to 5 hours on the time sheet, then adjusted again to 6 hours, the adjusted regular hours is -2.
Adjustment record level	Indicates if the record was adjusted (A) or if the parent record was adjusted (P).
Affects utilization (Y/N)	Indicates if resource utilization is affected.
Approval status	Status of the time record in the approval process.
Billable (Y/N)	Indicates if the time entry can be billed to the customer.
Capital (Y/N)	Indicates if the time entered is marked as a capital cost.
Created on	Date the time was created (which may be different than the date of the time entry).
Customer	Company associated with the time record (applicable to project time and request time, and not applicable to non-project time).
Daily conversion factor	Daily conversion factor for the time record.
Date interfaced	Date a time record was interfaced to another system. This field is updated by custom interfaces only.
End time	End time calculated based on the start time plus the amount of regular and overtime hours.
Engagement	Engagement associated with the time record (applicable to project time and request time, and not applicable to non-project time).
First name	First name of the resource associated with the time.
Fixed fee (Y/N)	Indicates if the time worked will be billed to the fixed fee portion of the related engagement.
Fixed fee name	Fixed fee associated with the time record.
Global workgroup	Global workgroup of the resource associated with the time record.
Invoice status	Invoice status of the time record: • 0 = Not invoiced • 1 = Invoiced • 3 = Excluded from billing
Last name	Last name of the resource associated with the time entry.
Middle name	Middle name of the resource associated with the time entry.
Overtime effort (days)	Overtime effort in days (overtime hours divided by the daily conversion factor for the time record).

Column	Description
Overtime effort (hours)	Overtime effort in hours.
Prepaid (Y/N)	Indicates if the time has been entered against a task associated with a prepaid fixed fee.
Project	Project associated with the time record.
Recognition batch number	Recognition batch number for recognized data that includes the time record.
Regular effort (days)	Regular effort in days (regular hours divided by the daily conversion factor for the time record).
Regular effort (hours)	Regular effort in hours.
Resource name	
Start time	Start time of the period covered by the time entry.
Task	Task associated with the time record.
Time description	Description of the work associated with the time entered in the time sheet.
Time entry date	Date of the time record.
Time locked (Y/N)	Indicates if the time entry has been locked.
Utilized overtime hours	Number of overtime hours (project or non-project time) that are included in the utilization for assigned resources.
Utilized regular hours	Number of regular hours (project or non-project time) that are included in the utilization for assigned resources.
Work code	Work code specified for the time entry in the time sheet.
Work location	Work location specified for the time entry in the time sheet.
Work performed For	Customer for whom work was performed (if this customer differs from the one invoiced for the work).
Workgroup	Workgroup of the resource who entered time for the project.

Project time billing

Column	Description
Adjusted overtime effort (days)	Adjusted overtime effort in days (overtime effort in hours divided by the daily conversion factor for the time record).
Adjusted overtime effort (hours)	Adjusted overtime effort in hours for the time record).

Column	Description
Adjusted regular effort (days)	Adjusted regular effort in days (regular effort in hours divided by the daily conversion factor for the time record).
Adjusted regular effort (hours)	Adjusted regular effort in hours for the time record.
Billable (Y/N)	Indicates if the time record is billable.
Billable overtime effort (hours)	Overtime effort in hours that can be invoiced to the customer.
Billable regular hours	Regular effort in hours that can be invoiced to the customer.
Daily conversion factor	Daily conversion factor for the time record (used to calculate time in days).
Equivalent hourly billing rate	Combination of the hourly billing rate, the converted daily rate and the converted fixed-fee rate.
Equivalent hourly billing rate currency	Equivalent hourly billing rate currency.
Equivalent hourly billing rate currency code	Equivalent hourly billing rate currency code.
Invoiced amount	Amount invoiced to the customer for the time. The calculated amount may be less than the total amount if split billing rules have been defined for the associated engagement.
Overtime billing rate	
Overtime billing rate currency	
Overtime billing rate currency code	
Overtime effort (days)	Overtime effort in days, calculated as the hourly effort divided by the daily conversion factor for the time record.
Overtime effort (hours)	Overtime effort in hours for the time record.
Rate 1	Rates specified for the resource.
Rate 1, 2, 3 currency	Rate currency.
Rate 2	
Rate 3	
Regular billing rate	Billing rate for regular time.
Regular billing rate currency	Regular billing rate currency.
Regular billing rate currency code	Regular billing rate currency code.

Column	Description
Regular effort (days)	Regular effort in days (regular effort in hours divided by the daily conversion factor for the time record).
Regular effort (hours)	Regular effort in hours.
Split billing (Y/N)	Indicates if split billing rules are set up for the engagement.
Split billing percentage	Percentage of the total amount invoiced to each customer, specified in the split billing rules.
Task name	Task for which time is billed.
Time entry date	Date of the time record.
Unbilled amount	Unbilled amount for time.

Project time cost

Column	Description
Cost currency	Currency of the project time cost.
Cost rate	Cost rate of the project time.
Cost rate currency (billing role)	Currency of the billing role-based cost rate.
Cost rate currency (resource)	Currency of the resource-based cost rate.
Count	Metric to perform data aggregation.
Overtime cost rate	Resource-based or billing role-based cost rate for overtime, depending on the setting specified for the billing office.
Overtime cost rate (billing role)	Billing role-based cost rate for overtime.
Overtime cost rate (resource)	Resource-based cost rate for overtime.
Overtime cost rate currency	Overtime cost rate currency.
Overtime cost rate currency code	
Regular cost rate (billing role)	Billing role-based cost rate for regular time.
Regular cost rate (resource)	Resource-based cost rate for regular time.

Column	Description
Regular cost rate currency	Regular cost rate currency.
Time entry date	Date the time was entered in the time sheet.

Project time revenue recognition

Column	Description
Count	Metric to perform data aggregation.
Engagement currency	Currency specified in the engagement of the project.
Engagement currency code	Engagement currency code.
Fixed fee name	Fixed fee associated with the time record.
Overtime billing rate for recognized amount	Overtime billing rate that was used in the revenue recognition process.
Partially recognized (Y/N)	Indicates if time-related revenue was partially recognized.
Recognition batch number	Recognition batch number for recognized data that includes the time record.
Recognition currency conversion date	Currency conversion date used in the revenue recognition process.
Recognized amount	Amount of recognized time revenue.
Regular billing rate for recognized amount	Regular billing rate that was used in the revenue recognition process.
Revenue GL credit account	Revenue GL credit account for recognized time.
Revenue GL debit account	Revenue GL debit account for recognized time.
Revenue recognition engagement cost center	Cost center of the engagement for which time was entered.
Revenue recognition resource cost center	Cost center of the resource who entered the time.
Revenue Recognition Run Date	Revenue Recognition Run Date

Column	Description
Tentative revenue amount	Amount of the time revenue calculated during the last tentative revenue recognition process.
Time entry date	Date the time was entered in the time sheet.

Request time

Column	Description
Account type	Account type of the company associated with the request time was entered for.
Actual time (Y/N)	Indicates if the current status of the time record meets the condition defining the record as actual time, as specified in the **Time Control** setting in Changepoint Administration.
Adjusted overtime effort (days)	Adjusted overtime effort in days (adjusted overtime hours divided by the daily conversion factor for the time record).
Adjusted overtime effort (hours)	Adjusted overtime effort in hours. For example, if an original time entry of 8 hours was adjusted to 5 hours on the time sheet, then adjusted again to 6 hours, the adjusted regular hours is -2.
Adjusted regular effort (days)	Adjusted regular effort in days (adjusted regular hours divided by the daily conversion factor for the time record).
Adjusted regular effort (hours)	Adjusted regular effort in hours.
Adjustment record level	Indicates if the record was adjusted (A) or if the parent record was adjusted (P).
Adjustment status (Y/N)	Status of the adjusted time record in the approval process.
Approval status	Status of the time record in the approval process.
Billable (Y/N)	Indicates if the time entry is billable.
Billable overtime effort (days)	Billable overtime effort in days.
Billable overtime effort (hours)	Billable overtime effort in hours.
Billable regular effort (days)	Billable regular effort in days.
Billable regular effort (hours)	Billable regular effort in hours.
Count	Metric to perform data aggregation.

Column	Description
Created on	Date the time was created (which may be different than the date of the time entry).
Customer	Customer associated with the time record.
Daily conversion factor	Number of hours to be used to convert time records from hours to days or FTEs.
Date interfaced	Date a time record was interfaced to another system.
End time	End time calculated based on the start time plus the amount of regular and overtime hours.
Engagement	Engagement associated with the time record.
Entered by	
First name	First name of the resource who entered the time.
Fixed fee (Y/N)	Indicates if the time will be billed to the fixed fee portion of the related engagement.
Fixed fee name	Fixed fee associated with the time record.
Global workgroup	Global workgroup of the resource who entered the time.
Invoice status	Indicates if the time record has been invoiced: • 0 = Not invoiced • 1 = invoiced • 3 = Excluded from billing
Last name	Last name of the resource who entered time.
Middle name	Middle name of the resource who entered time.
Overtime effort (days)	Overtime effort in days (overtime hours divided by the daily conversion factor for the time record).
Overtime effort (hours)	Overtime effort in hours.
Prepaid (Y/N)	Indicates if the time is prepaid (entered for a task that is associated with a prepaid fixed fee).
Project	Project associated for which the request time was entered.
Recognized (Y/N)	Indicates if the time billing amount has been recognized.
Regular effort (days)	Regular effort in days (regular hours divided by the daily conversion factor for the time record).
Regular effort (hours)	Regular effort in hours.
Request number	Request number associated to the time entry.
Resource	Resource associated with the time record.
Start time	Start time of the period covered by the time entry.

Column	Description
Time description	Description of the time entry.
Time entry date	Date of the time entry.
Time locked (Y/N)	Indicates if the time entry has been locked.
Utilized (Y/N)	Indicates if the time affects the utilization of resources.
Utilized overtime hours	Number of overtime hours that have been included in the utilization for assigned resources.
Utilized regular hours	Number of regular hours that have been included in the utilization for assigned resources.
Work code	Work code specified for the time in the time sheet.
Work location	Work location specified for the time in the time sheet.
Work performed For	Customer for whom work was performed (if this customer differs from the one invoiced for the work).
Workgroup	Workgroup of the resource who entered the time.

Request time billing

Column	Description
Adjusted overtime effort (days)	Adjusted overtime effort in days (hourly effort divided by the daily conversion factor for the time record).
Adjusted overtime effort (hours)	Adjusted overtime effort in hours.
Adjusted regular effort (days)	Adjusted regular effort in days (hourly effort divided by the daily conversion factor for the time record).
Adjusted regular effort (hours)	Adjusted regular effort in hours.
Billable (Y/N)	Indicates if the time record is billable.
Billable overtime effort hours	Billable overtime effort in hours, as specified in the SLA
Billable regular hours	Billable regular effort in hours, as specified in the SLA.
Count	Metric to perform data aggregation.
Daily conversion factor	Daily conversion factor for the time record (used to calculate effort in days).

Column	Description
Equivalent hourly billing rate	Combination of the hourly billing rate, the converted daily rate and the converted fixed-fee rate.
Equivalent hourly billing rate currency	Currency of the equivalent hourly billing rate.
Equivalent hourly billing rate currency code	Equivalent hourly billing rate currency code.
Invoiced amount	Amount invoiced to the customer for the time. The calculated amount may be less than the total amount if split billing rules have been defined for the associated engagement.
Overtime billing rate	Billing rate for overtime.
Overtime billing rate currency	Currency of the overtime billing rate.
Overtime billing rate currency code	Overtime billing rate currency code.
Overtime effort (days)	Overtime effort in days (Overtime effort in hours divided by the daily conversion factor for the time record).
Overtime effort (hours)	Overtime effort in hours.
Rate 1	Additional rates specified for the resource.
Rate 1, 2, 3 currency	Rate 1, 2, 3 currency.
Rate 2	
Rate 3	
Regular billing rate	Billing rate for regular time.
Regular billing rate currency	Regular billing rate currency.
Regular billing rate currency code	Regular billing rate currency code.
Regular effort (days)	Regular effort in days (regular effort in hours divided by the daily conversion factor for the time record).
Regular effort (hours)	Regular effort in hours.
Request number	
Split billing (Y/N)	Indicates if split billing rules have been defined for the engagement.
Split billing percentage	Percentage of the total amount invoiced to each customer, specified in the split billing rules.

Column	Description
Time entry date	Date of the time record.
Unbilled amount	Unbilled amount for time.

Request time cost

Column	Description
Cost rate currency (billing role)	Currency of the billing role-based cost rate.
Cost rate currency (resource)	Currency of the resource-based cost rate.
Count	Metric to perform data aggregation.
Overtime cost rate	Overtime cost rate of the resource who entered the time.
Overtime cost rate currency	Overtime cost rate currency.
Overtime cost rate currency (billing role)	Currency of the billing role-based cost rate for overtime.
Overtime cost rate currency (resource)	Currency of the resource-based cost rate for overtime.
Overtime cost rate currency code	Overtime cost rate currency code.
Regular cost rate	Resource-based or billing role-based cost rate for regular time, depending on the setting specified for the billing office.
Regular cost rate (billing role)	Billing role-based cost rate for regular time.
Regular cost rate (resource)	Resource-based cost rate for regular time.
Regular cost rate currency	Regular cost rate currency.
Regular cost rate currency code	Regular cost rate currency code.
Time entry date	Date the time was entered in the time sheet.

Request time revenue recognition

Column	Description
Count	Metric to perform data aggregation.
Engagement currency	Currency specified in the engagement associated with the request for which time was entered.
Engagement currency code	Engagement currency code.
Fixed fee name	Fixed fee associated with the time record.
Overtime billing rate for recognized amount	Overtime billing rate that was used in the revenue recognition process.
Partially recognized (Y/N)	Indicates if time-related revenue was partially recognized.
Recognition batch number	Recognition batch number for recognized data that includes the time record.
Recognition currency conversion date	Currency conversion date used in the revenue recognition process.
Recognized amount	Amount of time-related revenue that has been recognized.
Regular billing rate for recognized amount	Regular billing rate that was used in the revenue recognition process.
Revenue GL credit account	Revenue GL credit account for time.
Revenue GL debit account	Revenue GL debit account for time.
Revenue recognition engagement cost center	Cost center of the engagement for which the time was entered.
Revenue recognition resource cost center	Cost center of the resource who entered the time.
Tentative revenue amount	Amount of the time revenue calculated during the last tentative revenue recognition process.
Time entry date	Date the time was entered in the time sheet.

Non-project time

Column	Description
Actual time (Y/N)	Indicates if the current status of the time record meets the condition defining the record as actual time, as specified in the **Time Control** setting in Changepoint Administration.
Adjusted overtime effort (days)	Adjusted overtime effort in days (hourly effort divided by the daily conversion factor for the time record).
Adjusted overtime effort (hours)	Adjusted overtime effort in hours.
Adjusted regular effort (days)	Adjusted regular effort in days (hourly effort divided by the daily conversion factor for the time record).
Adjusted regular effort (hours)	Adjusted regular effort in hours.
Adjustment status (Y/N)	Status of the adjusted time record in the approval process.
Affects utilization (Y/N)	Indicates if resource utilization is affected.
Approval status	Status of the time record in the approval process.
Count	Metric to perform data aggregation.
Created on	Date the time was created (which may be different than the date of the time entry).
Date interfaced	Date a time record was interfaced to another system. This field is updated by custom interfaces only.
End time	End time calculated based on the start time plus the amount of regular and overtime hours.
First name	First name of the resource associated with the time.
Global workgroup	Global workgroup of the resource associated with the time record.
Last name	Last name of the resource associated with the time.
Middle name	Middle name of the resource associated with the time entry.
Overtime effort (days)	Overtime effort (in days), calculated as the hourly effort divided by the daily conversion factor for the time record.
Overtime effort (hours)	Overtime effort in hours.
Parent time record	Original time record before an adjustment was made.
Regular effort (days)	Regular effort in days (hourly effort divided by the daily conversion factor for the time record).
Regular effort (hours)	Regular effort in hours.

Column	Description
Resource	Resource associated with the time.
Start time	Start time of the period covered by the time entry.
Task	Task associated to the time record.
Time description	Description of the work associated with the time entered in the time sheet.
Time entry date	Date the time was entered in the time sheet.
Time locked (Y/N)	Indicates if the time entry has been locked.
Utilized overtime (hours)	Number of overtime hours that are included in the utilization for assigned resources.
Utilized regular time (hours)	Number of regular hours that are included in the utilization for assigned resources.
Workgroup	Workgroup of the resource who entered time for the project.

Non-project time billing

Column	Description
Adjusted overtime actual effort (days)	Adjusted overtime effort in days (adjusted regular hours divided by the daily conversion factor for the time record).
Adjusted overtime actual effort (hours)	Adjusted overtime effort in hours.
Adjusted regular actual effort (hours)	Adjusted regular effort in hours.
Adjusted regular effort (days)	Adjusted regular effort in days (adjusted regular hours divided by the daily conversion factor for the time record).
Daily conversion factor	Daily conversion factor for the time record (used to calculate effort in days).
Equivalent hourly billing rate	Combination of the hourly billing rate, the converted daily rate and the converted fixed-fee rate.
Equivalent hourly billing rate currency	Currency of the equivalent hourly billing rate.
Equivalent hourly billing rate currency code	Equivalent hourly billing rate currency code.
Overtime billing rate	Billing rate for overtime.

Column	Description
Overtime billing rate currency	Currency of the overtime billing rate.
Overtime billing rate currency code	Overtime billing rate currency code.
Overtime effort (days)	Overtime effort in days (hourly effort divided by the daily conversion factor for the time record).
Overtime effort (hours)	Overtime effort in hours.
Rate 1, 2, 3	Additional rates specified for the resource.
Rate 1, 2, 3 currency	Rate 1, 2, 3 currency.
Regular billing rate	Billing rate for regular time.
Regular billing rate currency	Currency of the regular billing rate.
Regular billing rate currency code	Regular billing rate currency code.
Regular effort (days)	Regular effort in days (hourly effort divided by the daily conversion factor for the time record).
Regular effort (hours)	Regular effort in hours.
Task name	Task for which time is billed.
Time entry date	Date the time was entered in the time sheet.

Non-project time cost

Column	Description
Cost currency	Currency of the non-project time cost.
Cost rate	Cost rate of the non-project time cost.
Cost rate currency (billing role)	Currency of the billing role-based cost rate.
Cost rate currency (resource)	Currency of the resource-based cost rate.
Count	Metric to perform data aggregation.
Overtime cost rate	Cost rate for overtime.
Overtime cost rate (billing role)	Billing role cost rate for overtime.

Column	Description
Overtime cost rate (resource)	Resource-based cost rate for overtime.
Overtime cost rate currency	Overtime cost rate currency.
Overtime cost rate currency code	Overtime cost rate currency code.
Regular cost rate (billing role)	Billing role cost rate for regular time.
Regular cost rate (resource)	Resource-based cost rate for regular time.
Regular cost rate currency	Regular cost rate currency.
Time entry date	Date the time was entered in the time sheet.

CHAPTER 26
Time Workflow

Project time workflow

Column	Description
Billing office cost center	Cost center of the billing office associated with the project for which time was entered.
Count	Metric to perform data aggregation.
Created on	Date the time was entered in the time sheet.
Engagement associated workgroup	Workgroup specified in the engagement of the project.
Engagement manager cost center	Engagement manager cost center.
Engagement manager workgroup	Engagement manager workgroup.
Entered by	Resource who entered the time for the project.
First level approval date	Date when time has been approved by the first level approver.
First level approver	First level time approver for the project.
Project manager workgroup	Workgroup of the project manager.
Rejection reason	Reason why a time record has been rejected.
Resource cost center	Cost center of the workgroup of the resource who entered time.
Second level approval date	Date when a time record has been approved by the second level approver.
Second level approver	Second-level time approver for the project.
Submitted on	Date when a time record has been submitted for approval.
Time entry date	Date when a time record was entered.
Workgroup	Workgroup associated with the time record.

Request time workflow

Column	Description
Billing office cost center	Cost center of the billing office associated with the project for which time was entered.
Count	Metric to perform data aggregation.
Created on	Date the time was entered in the time sheet.
Engagement associated workgroup	Workgroup specified in the engagement of the project.
Engagement manager cost center	Engagement manager cost center.
Engagement manager workgroup	Engagement manager workgroup.
Entered by	Resource who entered the time for the request.
First level approval date	Date when time has been approved by the first level approver.
First level approver	First level time approver for the project.
Project manager workgroup	Workgroup of the project manager.
Rejection reason	Reason why a time record has been rejected.
Resource cost center	Cost center of the workgroup of the resource who entered time.
Submitted on	Date when a time record has been submitted for approval.
Time entry date	Date when a time record was entered.
Workgroup	Workgroup associated with the time record.

Standard task time workflow

Column	Description
Billing office cost center	Cost center of the billing office associated with the associated project for which time was entered.
Count	Metric to perform data aggregation.
Created on	Date the time was entered in the time sheet.
Engagement associated workgroup	Workgroup specified in the engagement.

Column	Description
Engagement manager cost center	Engagement manager cost center.
Engagement manager workgroup	Engagement manager workgroup.
Entered by	Resource who entered the time for the standard task.
First level approval date	Date when time has been approved by the first level approver.
First level approver	First level time approver for the project.
Project manager workgroup	Workgroup of the project manager.
Rejection reason	Cost center of the workgroup of the resource who entered time.
Resource cost center	Date when a time record has been submitted for approval.
Second-level approval date	Date when time has been approved by the second level approver.
Second-level approver	The person who approves the time at the second level.
Submitted on	Date when a time record has been submitted for approval.
Time entry date	Date when a time record was entered.
Workgroup	Workgroup associated with the time record.

CHAPTER 27
Workflow History

Workflow history details

Column	Description
Action performed by	Resource who completed the step in the workflow process. ‘System’ indicates that the step was marked as skipped or escalated and concluded by the system.
Assigned on	Date the participant was assigned to the workflow.
Assigned to (participant)	Participant assigned to the workflow (if the participant is a resource, a system-defined participant, or role.
Assigned to (resource)	Participant assigned to the workflow (if the participant is a resource, system-defined participant, or a resource-based configurable field participant)
Assigned to (role)	Participant assigned to the workflow (if the participant is a role or a role-based configurable field participant).
Comments	Comments about the processed step.
Date actioned	Date when the action was taken.
Entity type	Workflow entity (project, opportunity, request or resource request).
Item name	Project name, opportunity name, request number or resource request number.
Participant code	System-defined participant code (such as 1IA for Manager of Initiator, TAI for Time Approver of Initiator, RMS for Resource Manager, etc.)
Process completed (Y/N)	Indicates if the workflow process has been completed.
Process name	Name of the workflow process.
State definition name	State definition of the workflow.
Step active (Y/N)	Indicates if the step is active in the workflow process.
Step completed (Y/N)	Indicates if the step is completed in the workflow process.
Step name	Step in the workflow process.
Step status	Label of the status based on step status code.
Step status code	

Column	Description
System-defined participant	System-defined participant, such as Manager, Account Manager, Request Responsible, etc.
Workflow log order	Indicates the order in which steps were executed and completed in the workflow.

CHAPTER 28
Workgroups

Workgroups

Column	Description
Children included (Y/N)	Indicates if the settings are applied to all subworkgroups of the workgroup.
Cost center	Cost center of the workgroup.
Country	Country where the workgroup is located.
Created by	Resource who created workgroup.
Created on	Date and time the workgroup was created.
Daily capacity	Number of hours in a working day.
Daily conversion factor	Number of hours to be used to convert records from hours to days or FTEs, and back.
Default billing office	Default billing office of the workgroup.
Default currency	Default currency of the workgroup.
Default currency code	Default currency code.
Default expense approver	Default expense approver for resources belonging to the workgroup.
Default GL account code	Default GL account code for the workgroup, used for invoice distributions of billed time.
Default time approver	Default time approver for resources of the workgroup.
Deleted (Y/N)	Indicates if the workgroup has been deleted.
Description	Description of the workgroup.
Entity access check (Y/N)	Indicates if resources in this workgroup need access to the entity to modify it in the resource management worksheet.
Expense threshold approval enabled (Y/N)	Indicates if an additional level of approval is required for expenses exceeding a specified amount.
Forecast effort demand type	Indicates if resources in this workgroup can use the forecast information in the resource management worksheet.
GL account description	Description of the default GL account.
Global workgroup	Global workgroup the workgroup belongs to.

Column	Description
Maximum number of decimal places in the time sheet	Maximum number of decimal places to display in the time entry and time total fields in the time sheet.
Maximum time allowed per day in the time sheet	Maximum number of time in hours and days that resources can enter for a day. This maximum includes both regular hours and overtime hours. The default value of 0 means no limit.
Only entity access required to access a resource management worksheet scenario (Y/N)	When enabled, resources who are not resource managers can access resource management scenarios.
Parent workgroup	Workgroup above the workgroup in the organization's hierarchy.
Percent available for planned work	Percentage of time that resources in this workgroup are available for planned work.
Planned effort demand type	Indicates if resources in this workgroup can use planned information in the resource management worksheet.
Planning unit workgroup settings applied to all sub workgroups (Y/N)	Indicates if planning unit workgroup settings are applied to all subworkgroups of the workgroup.
Profile link	
Sales portal (Y/N)	Indicates if the workgroup is included in the calculations of the sales-related portal.
Services portal (Y/N)	Indicates if the workgroup is included in the calculations of services-related portal.
Start time capture enabled (Y/N)	Indicates if the time tracking is activated to allow users to specify the starting time for entries in the time sheet.
Start time capture enforced (Y/N)	Indicates if the mandatory time tracking is activated to force users to specify the starting time for entries in the time sheet.
Threshold expense amount	Maximum amount of expenses to be exceeded before additional approval is required, provided that the expense threshold approval has been enabled.
Threshold expense approver	Resource who approves expenses that have exceeded a specified threshold.
Transfer revenue based on labor multiplier	When enabled, revenue transfers to the workgroup are based on resource cost rates, rather than billing rates.
Transfer revenue based on revenue percentage	When enabled, revenue transfers to the workgroup are based on the resource billing rate.
Updated by	Resource who last updated the workgroup information.
Updated on	Date and time the workgroup information was last updated.

Column	Description
User-defined ÿSingularTitle,workgroupÿ ID	
View access check (Y/N)	Indicates if resources in this workgroup need access to the entity to view it in the resource management worksheet.
Workgroup level	Level of the workgroup within the organization, for example, global, national, regional etc.
Workgroup name	Workgroup name.
Workgroup planning unit applied to all subgroups	
Workgroup type	