Portfolio Management

User Guide

Changepoint PPM 2017

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1. Portfolio Management Introduction

About portfolio management

The portfolio management functionality allows organizations to manage business unit technology requests and initiatives throughout the workflow cycle, from inception to project delivery. Working closely with the information technology department, business units in an organization can plan effectively for their future requirements and align investments to corporate goals and objectives.

Portfolio management process

The key steps in the portfolio management process are:

1. Define strategies, objectives and sources
   - Business units define their overall goals and requirements as *objectives*
   - Objectives are organized under corporate *strategies*
   - Business units ensure that their project planning aligns with their objectives
   - *Sources* include information that influences the decision about initiatives
2. Create and review planning requests
   - Create *planning requests*, which include high-level estimates of cost and effort
   - Planning requests may require approval as part of the request workflow
   - Review and update planning requests, as defined by the request workflow
3. Screen planning requests and create request scenarios
   - Review, filter, sort and isolate the planning request for analysis
   - Create request scenarios for analysis
   - Compare request scenarios by using scenario comparisons
4. Create candidates and budgets
   - Create candidates from planning requests that have been selected for further consideration

- Add more detailed planning information to candidate, including budgeting (multiple cost structures) for services and non-labor items
- Align candidates with objectives

5. Screen and analyze candidates
   - Screen candidates
     - Review, filter, sort and select multiple candidates
     - Review total effort and total budgeted, revenue/charge, cost and margins
   - Create candidate scenarios
     - Select a group of candidates as a prospective portfolio for evaluation
     - Save the group as a candidate scenario
     - Review total effort and total budgeted, revenue/charge, cost and margins
   - Compare candidate scenarios by using scenario comparisons
   - Analyze demand items by using resource demand scenario
6. Create initiatives or projects based on candidates.
   - Select and approve candidates
   - Create initiatives from selected candidates
   - Create projects and project budgets from the selected candidates.
7. Manage and analyze performance of project portfolios. For more information, see "Creating Portfolios" in the *Performance Management User Guide*.

2. Strategies and Objectives

strategies and objectives

Strategies are the overall scope and directions of your organization and the way in which its various business operations work together to achieve defined objectives. Objectives are the overall goals and requirements that will be undertaken in order to realize the strategies.

Defining strategies and objectives helps your organization to consider its future course and to make decisions on potential projects under consideration (candidates) and ongoing projects, and on resource allocation.

Strategies and objectives tend to change over time, so projects (including candidates and ongoing projects) should constantly be evaluated against your strategies and objectives.

Candidates can be associated with multiple objectives and then evaluated to determine how well they meet the organization's overall strategies.

Accessing a strategy

1. Click **Program Management** > **Objectives**.

   The **Objectives** tree view appears.

2. Click the strategy.

   The strategy profile appears.

Creating a strategy

1. Click **New** > **Strategy**.

   The **Create Strategy** dialog box appears.

2. In the **Strategy** field, enter a unique name for the trategy.

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

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

5. Click **Save**.

Editing a strategy

1. Click **Program Management** > **Objectives**.

The **Objectives** tree view appears.

2. Click the strategy.

   The strategy profile appears.

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

   The **Edit Strategy** dialog box appears.

4. Make the necessary changes.

5. To delete the strategy:

   a. Click **Delete**.

   b. Click **OK** to confirm.

6. Click **Save**.

Accessing an objective

1. Click **Program Management** > **Objectives**.

   The **Objectives** tree view appears.

2. Expand the view to locate the objective.

3. Click the objective.

   The objective appears.

Creating an objective

1. Click **New** > **Objective**.

   The **Create Objective** dialog box appears.

2. In the **Objective** field, enter the objective's name.

3. In the **URL** field, enter the objective's website address.

4. In the **Description** field, type any relevant information about the objective.

5. Click the **Strategy** tab and select one or more objectivecategories for the objective.

6. To provide background information about the objective, click the **Background** tab and enter the information.

7. To provide the benefits of the objective, click the **Benefits** tab and enter the information.
8. Click the **Summary** tab and enter a summary of the objective.
9. Click **Save**.

Editing a objective

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

   The **Edit Objective** dialog box appears.
3. Make the necessary changes.
4. To edit a objective:
   a. Click **Delete**.
   b. Click **OK** to confirm.
5. Click **Save**.

Measuring the candidate alignment of an objective

You can evaluate how often an objective is used and how often the objective is referenced on approved candidates. The alignment is evaluated over a specific period of time and displayed as a percentage.

1. Access the objective.
2. In the **Performance** section, click the **Calculate alignment results** link.

   The filter view appears.
3. To specify a fiscal period:
   a. Select **Fiscal period**.
   b. In the **Fiscal period selection** list, select the cost structure that includes the fiscal periods.
   c. In the **Fiscal year** field, select the fiscal year.
   d. In the **Fiscal period** field, select one or more fiscal periods.
4. To specify a date range:

a. Select **Date range**.

b. In the **Start date** field, enter the start date.

c. In the **End date** field, enter the end date.

5. Click **Go**.

   The objective displays the alignment results for the specified period.

3. Sources

About sources

You create campaigns to record information that influences your organization's initiatives, such as a departmental budget, a source of funding for a candidate, or the driving force for an initiative. You can associate candidates with source information to determine if they are part of a specific budget or part of a funding formula. You organize sources under source categories.

Accessing a source category

1. Click **Program Management** > **Sources**.

   The **Source** tree view appears, displaying the source grouped by source categories.

2. Click the source category.

   The source category profile appears.

Creating a source category

1. Click **New** > **Source category**.

   The**Create Source** dialog box appears.

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

   The source category is created.

Editing a source category

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

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

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

   a. Click **Delete**.

b. Click **OK** to confirm.

5. Click **Save**.

Accessing a source

1. Click **Program Management** > **Sources**.

   The **Sources** tree view appears.

2. Expand the tree view to locate the source.

3. Click the source.

   The source profile appears.

4. To display the sourcecosts, click the **Source information** tab.

   The source costs are displayed.

Creating a source

1. Click **New** > **Source**.

   The **Create Source** dialog box appears.

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

3. Click **Save**.

4. You can enter costs for the source. For more information, see "Adding source costs" on page 18.

Create/Edit Source dialog box, General tab options

Option	Description
Category list	Category for the source.
Source field	Name of the source.
URL field	Website address for the source.
Description field	Description of the source.

Option	Description
Start date field	Estimated start date of the activities or work associated with the source.
End date field	Estimated start date of the activities or work associated with the source.
Approved check box	When selected, indicates that the budget has been approved.
Budget amount field	Total amount of revenue or cost that you estimate for the source.
Currency list	Currency for the budget amount.
Contact type-ahead field	Internal resource who is responsible for maintaining the source.
Related client type-ahead field	Client related to the source.
Main contact list	Client contact that is the main contact.
Secondary contact list	Client contact that is the secondary contact.

Editing a source

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

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

Adding source costs

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

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

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

   A new row is added to the table.
5. Complete the fields as required. For more information, see "Create/Edit Source dialog box, Costs tab options" on page 18.
6. Click **Save**.

Create/Edit Source dialog box, Costs tab options

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

Editing a source cost

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

The **Edit Source** dialog box appears.

3. Click the **Costs** tab.
4. Make the necessary changes.
5. To delete the source cost:
   a. In the table, right-click the cost item row, and then select **Configure** > **Delete**.
   b. Click **OK** to confirm.
6. Click **Save**.

Adding a cost item to a source

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

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

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

Editing a cost item for a source

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

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

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

b. Click **OK** to confirm.

7. Click **Save**.

4. Planning Request Scenarios and Screening

About planning requests

A planning request is a specific type of request that represents a potential new initiative or project and includes preliminary information such as business justification and risk assessment. High-level estimates for both effort and costs can also be added to planning requests. Planning requests can be classified according to your organization's portfolio evaluation criteria.

You access, create, and edit planning requests the same way that you access, create, and edit the other types of requests. For more information, see "Request Basics" in the *Request Management User Guide*.

You can review, categorize and evaluate planning requests. Some planning requests are promoted to candidates.

Accessing a planning request in Request Screening

You can access planning requests the same way as the other types of requests. You can also access planning requests using the request screening functionality, as described here.

1. Click **Program Management > Request Screening**.

   The **Scenario Selection (Request)** view appears.

2. Click **Actions > Initiate screening**.

   The **Request Selection** filter view appears.

3. In each field, select the criteria to filter the planning requests.

4. Click **Go**.

   The **Request Selection** view displays the planning requests that match the filter criteria.

5. Double-click the planning request.

   The planning request profile appears.

Screening planning requests

You use the screening functionality to review and filter planning requests. You can create request scenarios to compare planning requests. When you have decided to proceed with a planning request, you can create a candidate based on it.

1. Click **Program Management** > **Request Screening**.

   The **Scenario Selection (Request)** view appears.

2. Click **Actions** > **Initiate screening**.

   The **Request Selection** filter view appears.

3. To filter the planning requests, select the criteria in one or more of the fields.

4. Click **Go**.

   The **Request Selection** view displays the planning requests that match the filter criteria.

5. To view a planning request:

   a. Double-click the planning request.

   b. To return back to the list, click .

6. You can use the right-click menu options to filter, sort and isolate specific planning requests in the table for further analysis.

Creating a request scenario

You can save a group of planning requests as a request scenario.

1. Screen the planning requests.

2. Select the planning requests that you want to include in the request scenario.

3. Click **Actions** > **Create** > **Scenario**.

   The **Scenario** view appears.

4. Complete the fields as required. For more information, see "Scenario view options" on page 23.

5. Click **Actions** > **Save**.

Scenario view options

Fields	Description
Scenario name field	Name of the scenario.
Description field	Description of the scenario.
Benefits field	Benefits of the scenario.
Risks field	Risks of the scenario.
Sponsor type-ahead field	Resource who is backing the candidate or request.
Cost structure type-ahead field	The cost structure whose fiscal periods are used for revenue and cost amounts.

Accessing a request scenario

1. Click **Program Management** > **Request Screening**.

   The **Scenario Selection (Request)** view appears.

2. Double-click the request scenario.

3. To view the planning requests in the request scenario, click the **Scenario members** tab.

Editing a request scenario

1. Access the request scenario.

2. Click **Actions** > **Edit**.

   The **Scenario** view appears.

3. Make the necessary changes.

4. Click **Actions** > **Save**.

Adding a planning request to a request scenario

1. Access the request scenario.

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

3. Select a planning request (it does not matter which one).
4. In the **Scenario members** section, click **Actions** > **Edit members**.

   The view is refreshed.
5. Click **Actions** > **Add members**.

   The **Planning Request Selection** filter view appears.
6. To filter the planning requests, select the criteria in one or more of the fields.
7. Click **Go**.

   The **Scenario members** section displays the planning requests that match the filter criteria, and the existing scenario members (even if they do not match the filter criteria).
8. Select all of the planning requests that you want to include in the request scenario, including the existing scenario members.
9. Click **Actions** > **Save**.

Removing a planning request from a request scenario

1. Access the request scenario.
2. Expand the **Scenario members** section.
3. Select a planning request (it does not matter which one).
4. Click **Actions** > **Edit members**.

   The view is refreshed.
5. Select only the planning requests that you want to include in the request scenario.
6. Click **Actions** > **Save**.

Creating a new request scenario based on an existing request scenario

1. Access the request scenario.
2. Expand the **Scenario members** section.
3. Select a planning request (it does not matter which one).
4. Click **Actions** > **Edit members**.

   The view is refreshed.

5. Select the planning requests that you want to include in the new scenario.
6. Click **Actions** > **Save as new scenario**.

   The **Scenario** view appears.
7. Complete the fields as required. For more information, see "Scenario view options" on page 23.
8. Click **Actions** > **Save**.

Deleting a request scenario

1. Click **Program Management** > **Request Screening**.

   The **Scenario Selection (Requests)** view appears.
2. Click one or more request scenarios that you want to delete.
3. Click **Actions** > **Delete** > **Scenario**.
4. Click **OK** to confirm.

Approving a planning request

You can approve one or more planning requests in a request scenario. Approving a planning request does not change the status of the request, which is based on the request workflow.

1. Access the request scenario.
2. Expand the **Scenario members** section.
3. Select the planning requests that you want to approve.
4. Click **Actions** > **Approve**.
5. Click **OK** to confirm.

   A check mark appears in the **Approved** column of each approved planning request.

About creating candidates from planning requests

You can create a candidate based on a planning request from the following locations:

- From a planning request profile. For more information, see "Creating a candidate from a planning request profile" on page 26.

- From a planning request in the **Request Screening** application. For more information, see "Creating a candidate from a planning request in a request scenario" on page 26.

Creating a candidate from a planning request profile

1. Access the planning request.
2. Click **Actions** > **Create** > **Candidate**.
3. The **Create Candidate** dialog box appears.
4. Complete the fields as required.
5. Click **Save**.

Creating a candidate from a planning request in a request scenario

When you create candidates from planning requests in a request scenario, a candidate is created for each planning request that is included in the scenario. If mandatory information is required for a candidate, you must first complete the mandatory fields before the candidate can be created.

1. Access the request scenario.
2. Expand the **Scenario members** section.
3. Select one or more planning requests from which you want to create a candidate.
4. Click **Actions** > **Create** > **Candidate**.
5. Click **OK**.

   The **Create Candidate from Scenario** dialog box appears.
6. Complete the fields as required.
7. Click **Save**.

   A candidate is created for each of the selected planning requests. The name of the candidate comes from the short description of the planning request.

Field Mapping – Planning Request to Candidate

Planning Request Fields	Candidate Fields
Request number (**General** tab)	**Request** (**General** tab)
Initiator (**General** tab)	**Main contact** (**General** tab)
Client (**General** tab)	**Client** (**General** tab)
Category (**General** tab)	**Category** (**General** tab)
Date required (**General** tab)	**Initially proposed start** (**Budget** tab)
Short description (**General** tab)	**Name** (**General** tab)
Application (**General** tab)	**Non-labor item** (**General** tab)
Request priority (**General** tab)	**Priority** (**General** tab)
Responsible (**General** tab), if you have access to create candidates. If you do not have access rights to create candidates, or if the **Responsible** field is empty, then the client manager from the client is used.	**Client manager** (**General** tab)
Estimated service costs + **Estimated non-labor costs** + **Estimated other costs** (**Estimates** tab)	**Budgeted total** (**Budget** tab)
Configurable fields that are shared between planning requests and candidates (**Configurable fields** tab)	Configurable fields that are shared between planning requests and candidates (**Configurable fields** tab)
Details tab	**Description** (**General** tab)

5. Managing Candidates

About candidates

Candidates represent potential work that your organization is considering, and can include estimates and evaluation data for the planning of internal deployment, such as budget information, high-level resource requirements, review teams and objectives. Candidates can be created as a new record or from a planning request.

After candidates are analyzed and prioritized, you can record the decisions. Candidates that have been retained for implementation can be used to create initiatives and projects.

Accessing a candidate

1. Click **Program Management** > **Candidates**.

   The **Candidates** tree view appears.

2. Expand the tree view and select the candidate.

   The candidate profile appears.

Creating a candidate

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

1. Click **New** > **Candidate**.

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

2. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, General tab options" on page 30.

3. Click **Save**.

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

   - "Entering fixed fee information for a candidate budget" on page 35
   - "Entering non-labor item budget information for a candidate" on page 36
   - "Entering service budget information for a candidate" on page 38
   - "Entering expense budget information for a candidate" on page 41
   - "Specifying the resources for a review team" on page 32

- "Restricting access to a candidate" on page 31
- "Specifying the decision for a candidate" on page 45
- "Adding a comment to the candidate history" on page 31

Create/Edit Candidate dialog, General tab options

Option	Description
Candidate field	Name of the candidate.
Alternate name field	Alternate name for the candidate. Typically used to display the name in a different language or using a different alphabet.
Client type-ahead field	Client for which the candidate is being created.
Main contact list	Client contact for the candidate.
Client manager type-ahead field	Resource who is responsible for the candidate.
Staffing workgroup type-ahead field	Workgroup to be used in resource demand calculations. Default is the workgroup of theclient manager.
Estimation currency field	Currency of the cost estimates for the candidate.
Cost structure type-ahead field	Cost structure associated with the candidate.
Estimation basis list	Basis for cost estimations, for example, daily hourly, fixed fee or mixed).
Source list	Source associated with the candidate.
Category list	. Category for the candidate.
Priority list	Priority of the candidate.
Request type-ahead field	Number of the request from which the candidate was created, or that is associated with the candidate.

Option	Description
Non-labor item field	Non-labor item that is associated with the candidate, either directly or through a request.
Fiscal period type-ahead field	Cost structure whose fiscal periods are used when displaying the budget information across fiscal years.
Description field	Description of the candidate.

Adding a comment to the candidate history

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

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

Restricting access to a candidate

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

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

   The **Edit Candidate** dialog box appears.
3. Click the **Access** tab.
4. Select the **Restrict access to the following resources** check box.
5. In the **Preferred Resources** list, select the resources.

   Tip: To select other resources and optionally add them to your preferred resources, click **Manage Resources**.
6. Click the up arrow.

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

Specifying the objectives for a candidate

The objective for a candidate is one of the screening criteria used in the candidate screening process.

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

   The **Edit Candidate** dialog box appears.
3. Click the **Objectives and decisions** tab.
4. In the **Objectives** list, select the objectives.
5. To add a objective to the list, click **Add Objectives**. For more information, see "Creating an objective" on page 12.
6. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, Objectives and decisions tab options" on page 46.
7. Click **Save**.

Specifying the resources for a review team

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

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

   The **Edit Candidate** dialog box appears.
3. Click the **Review team** tab.
4. To add resources:
   a. In the **Preferred Resources** list, select the resources.

   b. Click the up arrow.

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

6. To remove resources:

   a. Select the resources in the **Sales team** list.

   b. Click the down arrow.

7. Click **Save**.

About creating budgets for candidates

You can track the costs associated with a candidate in the budget tabs: **Fixed fees**, **Non-labor items**, **Services** and **Expenses**. The information from the tabs is summarized in the **Budget** tab.

About displaying fiscal periods in the budget tabs

If a cost structure is specified in the **Fiscal** period field on the candidate, then the fiscal periods for the cost structure are displayed on each of the budget tabs, as well as the following columns:

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

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

About burden rates on services budgets

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

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

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

Creating a budget for a candidate

The **Budgeted total** field on the **Budget** tab of the candidate profile is not updated automatically. You can either enter an amount manually, or update the amount based on the revenue budget totals by clicking the **Update Revenue** button on the **Budget** tab.

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

   The **Edit Candidate** dialog box appears.
3. Click the **Budget** tab.
4. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, Budget tab options" on page 34.
5. Click **Save**.
6. For more information about completing the remaining forecast tabs, see the following topics:
   - "Entering fixed fee information for a candidate budget" on page 35
   - "Entering non-labor item budget information for a candidate" on page 36
   - "Entering service budget information for a candidate" on page 38
   - "Entering expense budget information for a candidate" on page 41

Create/Edit Candidate dialog, Budget tab options

Option	Description
Status list	Status of the candidate.
Probability (%) list	Percent probability of implementing the candidate. If your organization uses fixed percentages based on status, this field is not available.

Option	Description
Budgeted total field	Estimated total cost amount or the total chargeable amount for the candidate.
Include the candidate in the screening process check box	When selected, the candidate is included in the candidate screening process.
Initially proposed start field	Date that the candidate is expected to start. Once saved, this date cannot be changed because it is used as a baseline.
Revised start field	Revised date that the candidate is expected to start.
Update Cost button	Updates the **Budgeted total** field with the total cost amount from the summary table .
Update Revenue button	Updates the **Budgeted total** field with the total chargeable amount from the summary table .

Entering fixed fee information for a candidate budget

Use the following procedure to include a fixed fee item in the budget.

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

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

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

Create/Edit Candidate dialog, Fixed fees tab options

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

Entering non-labor item budget information for a candidate

You can enter details about the non-labor items, such as application licenses, application support, and hardware costs, that are budgeted for the candidates.

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

   The **Edit Candidate** dialog box appears.
3. Click the **Non-labor items** tab.
4. Right-click in the table, and then select **Insert**.
5. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, Non-labor item tab options" on page 37.

6. Click **Save**.

Create/Edit Candidate dialog, Non-labor item tab options

Option	Description
First column	The first column displays status icons as required: • – service is associated with a funding source. • – service is locked from the RMW by another resource, and cannot be saved until it is unlocked there. • – service was last saved in the RMW and you should review the changes. The icon will be removed after you save the service.
Non-labor item field	Non-labor item.
Capital check box	When selected, designates the non-labor item revenue as capital.
Description field	Description of the non-labor item.
Date field	Date the non-labor item is required.
Quantity field	Number of units of the non-labor item. The quantity can be a negative value, for example, to indicate a credit or a return.
Standard charge per unit field	Standard cross charge amount per unit for the non-labor item.
Discount (%) field	Percentage discount. To mark up the amount, enter a negative percent.
Negotiated charge per unit field	The negotiated cross charge amount per unit of the non-labor item, which is calculated as follows: Standard charge per unit * Discount percent
Standard unit cost field	Standard cost per unit of the non-labor item.

Option	Description
Negotiated unit cost field	The negotiated cost per unit of the non-labor item.
Totals	
Total quantity field	Total units for the non-labor item.
Average charge per unit field	Average unit price of the non-labor item. Appears only when a fiscal period is selected.
Average unit cost field	Average unit cost of the non-labor item. Appears only when a fiscal period is selected.
Total cross charge amount field	Total amount to be cross charged for the non-labor item.
Total cost amount field	Total cost of the non-labor item.
Margin field	Total margin for the non-labor item (cross charge amount minus the cost).

Entering service budget information for a candidate

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

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

   The **Edit Candidate** dialog box appears.
3. Click the **Services** tab.
4. Right-click in the table, and then select **Insert**.
5. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, Services tab options" on page 39.
6. Click **Save**.

Create/Edit Candidate dialog, Services tab options

Option	Description
First column	The first column displays status icons as required: • – service is associated with a funding source. • – service is locked from the RMW by another resource, and cannot be saved until it is unlocked there. • – service was last saved in the RMW and you should review the changes. The icon will be removed after you save the service.
Cost structure type-ahead field	Cost structure whose rates are used for the service. The default is the candidate's cost structure. If you select a different cost structure, the candidate's cost structure still determines whether the candidate uses staffing level-based cost rates or resource-based cost rates and exchange rates in triangulation.
Staffing level field	Staffing level for the service.
Resource type-ahead field	Resource who will perform the work for the service.
Function list	Function associated with the service.
Use the rates from the cost structure check box	When selected, the rates from the cost structure are used instead of negotiated rates. Note that the check mark is cleared after you save the service. For more information, see "About using rates for services" on page 41.
Fixed fee list	Fixed fee schedule associated with the service. This field appears only when the fixed fee or mixed estimation basis is selected for the candidate.
Capital check box	When selected, designates the service as a capital cost.
Comments field	Additional information about the service.

Option	Description
Start date field	Estimated date the service will begin.
End date field	Estimated date the service will end.
Hours or **Days** field	Estimated number of hours or days required for the service. The label on this field depends on the estimation basis.
Currency list	Currency for the service rates. The default is the currency of thecandidate's cost structure, if the same currency has been set up in the staffing level.
Standard cross charge rate field	Standard cross charge rate for the staffing level.
Discount (%) field	Percentage discount
Negotiated cross charge rate field	The negotiated cross charge rate (standard cross charge rate minus discount) for the service.
Standard cost rate field	The standard cost rate for this service.
Negotiated cost rate field	The negotiated cost rate (standard cost rate minus discount) for this service.
Totals	
Total hours field	Total hours for the service.
Average cross charge rate field	Average cross charge rate of the service. This field appears only when a fiscal period is selected.
Average cost rate field	Average cost rate of the service for the candidate. This field appears only when a fiscal period is selected.
Total cross charge amount field	Total cross charge amount for the service, which is calculated by multiplying the number of estimated hours or days by the negotiated rate of the resource or service.

Option	Description
Total cost amount field	Total cost amount for the service, which is calculated by multiplying the number of estimated hour or days by the resource-based cost rate or staffing level-based cost rate.
Margin field	Difference of total cross charge amount minus the total cost amount.

About using rates for services

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

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

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

Entering expense budget information for a candidate

You can enter information about estimated expenses for the candidate.

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

   The **Edit Candidate** dialog box appears.
3. Click the **Expenses** tab.
4. Right-click in the table and then select **Insert**.
5. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, Expenses tab options" on page 42.
6. Click **Save**.

Create/Edit Candidate dialog, Expenses tab options

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

Option	Description
Cross charge amount field	Total amount being cross charged for all expenses.
Cost amount field	Total cost of all expenses.
Margin field	Difference of total cross charge amount minus total cost amount

Editing a candidate

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

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

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

Editing a budget item

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

   The **Edit Candidate** dialog box appears.
3. Click the tab (**Fixed fees**, **Non-labor items**, **Services**, or **Expenses**) that includes the budget item.
4. Make the necessary changes.
5. To delete a budget item:

   a. Right-click the item and then click **Delete**.

b. Click **OK** to confirm.

6. Click **Save**.

Associating a candidate budget item with a funding source

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

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

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

Copying a candidate budget item

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

   The **Edit Candidate** dialog box appears.
3. Click the tab (**Fixed fees**, **Non-labor items**, **Services**, or **Expenses**) that includes the budget item.
4. In the table, right-click the item, and then click **Copy**.

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

Changing the fiscal periods that are displayed for a candidate

If fiscal periods are specified for a candidate, the current fiscal period, the previous fiscal period, and the next 12 fiscal periods are displayed by default in the candidate budget item

views. You can change the fiscal periods that are displayed, but the total number of fiscal periods cannot exceed 14.

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

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

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

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

Deleting a candidate

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

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

Specifying the decision for a candidate

You can enter or change the decision for a candidate at any time. You can also lock the budget tabs to prevent changes to the budget information.

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

   The **Edit Candidate** dialog box appears.
3. Click the **Objectives and decisions** tab.
4. Complete the fields as required. For more information, see "Create/Edit Candidate dialog, Objectives and decisions tab options" on page 46.
5. Click **Save**.

Create/Edit Candidate dialog, Objectives and decisions tab options

Option	Description
Objectives list	List of objectives.
Add objective button	Displays the **Create Objective** dialog box.
Primary objective list	Primary objective for the candidate.
Decision section	Indicates the decision. Options are: • Approved • Rejected • No decision • Other
Decision date field	Date of the decision. Appears only when an decision option is selected.
Lock budget check box	When selected, prevents editing in the **Non-labor items** tab, **Services** tab, and **Expenses** tab, and the **Budgeted total** field in the **Budget** tab.
Decision details field	Comments about the decision.

6. Candidate Screening and Scenarios

About screening candidates

You can do the following to screen candidates:

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

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

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

Screening candidates

1. Click **Program Management** > **Candidate Screening**.

   The **Scenario Selection (Candidates)** view appears.

2. Click **Actions** > **Initiate screening**.

   The filter criteria view appears.

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

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

4. Click **Go**.

   The **Candidate Selection** view displays the candidates that match the filter criteria.

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

6. To view a candidate profile, double-click the row.

7. From this point, you can create a candidate scenario. For more information, see "Creating a candidate scenario" on page 48.

Creating a candidate scenario

You can create an candidate scenario based on the opportunities in the **Candidate Selection** view. You can then add and remove candidate members from the candidate scenario. You can also create new candidate scenarios based on existing candidate scenarios.

1. Initiate the candidate screening. For more information, see "Screening candidates" on page 47.
2. In the **Candidate Selection** view, click the rows of the records you want to include in the scenario.
3. Click **Actions** > **Create** > **Scenario**.

   The **Scenario** view appears.
4. Complete the fields as required. For more information, see "Scenario view options" on page 23.
5. Click **Actions** > **Save**.

Accessing an candidate scenario

1. Click **Program Management** > **Candidate Screening**.

   The **Scenario Selection (Candidates)** view appears.
2. Double-click the candidate scenario.

   The scenario profile appears.
3. To view the candidates that are included in the scenario, expand the **Scenario members** section.

Editing a candidate scenario

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

1. Access the candidate scenario.

   The scenario profile appears.
2. Click **Actions** > **Edit**.

The **Scenario** view appears.

3. Make the necessary changes in the **General** section.
4. To add or remove candidates, expand the **Scenario members** section. For more information, see "Adding and removing candidates from a scenario" on page 49.

Adding and removing candidates from a scenario

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

1. Access the candidate scenario.
2. Expand the **Scenario members** section.
3. To add candidates:
   a. Click **Actions** > **Edit members**.
   b. Click **Actions** > **Add members**. The **Candidate Selection** view appears.
   c. Select the values for the fields as required.
   d. Click **Go**.

      The candidates that match the filter criteria are added to the **Scenario members** section.
4. To remove candidates, select only the candidates that you want to include.
5. In the **Scenario members** section, click **Actions** > **Save**.

Creating a candidate scenario from an existing scenario

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

   The **Scenario Details** view appears.

6. Complete the fields as required. For more information, see "Creating a candidate scenario" on page 48.
7. Click **Actions** > **Save**.

Deleting a candidate scenario

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

Editing a candidate from a scenario

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

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

To make any other changes to an candidate, you must access the candidate directly. For more information, see "Editing a candidate" on page 43.

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

About viewing candidates in a Gantt chart

You can compare candidates from candidate scenarios in a Gantt chart. The Gantt chart provides a rolled-up summary of each candidate that is included. The summary is based on

budget information from the candidate.

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

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

Viewing candidates from a scenario in a Gantt chart

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

To view the candidates from the Scenario Selection (Candidates) view in a Gantt chart

1. Click **Program Management** > **Candidate Screening**.

   The **Scenario Selection (Candidates)** view appears.

2. To view the candidates from one or more of the scenarios in a Gantt chart, do one of the following:

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

To view the candidates from a candidate scenario in a Gantt chart:

a. Access the candidate scenario.

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

c. Do one of the following:

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

About candidate reports

There are two types of candidate reports reports:

- **Portlet reports** – For more information, see the *User Basics User Guide*.
- **Standard Changepoint reports** – The following reports are available:
  - Candidate Decision: Approved (Candidate Management and Objective Analysis categories) – list of candidates that were approved.
  - Candidate Decision: Rejected (Candidate Management and Objective Analysis categories) – list of candidates that were rejected.
  - Objectives by Frequency (Objective Analysis category) – contains the frequency at which an objective is associated with a candidate and statistics related to their acceptance and rejection ratios.

7. Creating New Entities from Candidates

About copying candidate information to create new entities

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

- a new candidate
- a new initiative
- a new project

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

Copying the candidate budget information to a new candidate

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

1. Access the candidate profile that contains the budget information.
2. Click **Actions > Copy candidate budget**.

   The **Copy Candidate Budget** dialog box appears.
3. To specify the client, do one of the following:
   - In the **Client** type-ahead field, select the name of the client.
   - In the **Client** type-ahead field, select the client ID.
4. In each of the following fields, enter the number of fiscal periods to move the budget items in the target candidate. To move back, enter a negative number:
   - **Number of fiscal periods to move fixed fees**
   - **Number of fiscal periods to move non-labor items**
   - **Number of fiscal periods to move services**
   - **Number of fiscal periods to move expenses**
5. Click **Save**.
6. Click **OK** to confirm.

The **Create Candidate** dialog box appears.

7. Complete the fields as required. For more information, see .
8. Click **Save**.

About creating initiatives from candidates

When you create an initiative from a candidate, information from the candidate is copied to the initiative.

Most fields are named the same in both the candidate and initiative, with the following exceptions:

- The **Estimation basis** field in the candidate is mapped to the **Cross charge type** field in the initiative.
- The **Budgeted total** field in the candidate is mapped to the **Approved amount** field in the initiative.
- There are some minor differences in the labels for some of the budget items. For example, the fixed fee deliverable date for the candidate is mapped to the fixed fee cross charge date for the initiative.
- Fixed fees for fiscal periods in the candidate are saved as schedule items under the **Fixed-fee schedule** section of the initiative.
- If your organization uses resource requests, then the **Resource** field is not copied from the **Services** tab.

Creating an initiative from a candidate

1. Access the candidate.
2. Click **Actions** > **Create** > **Initiatives**.

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

   The **Create Initiative** dialog box appears.

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

About creating projects from candidates

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

- **Labor** – service cost totals
- **Other expense** – non-labor cost totals
- **Project value** – budgeted charge total for the candidate, or budgeted cost total if charge is not populated

Creating a project from a candidate

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

   The **Create Project from Candidate** dialog box appears.
3. Complete the fields as required. See "Create Project from Candidate dialog box options" on page 56.
4. Click **Save**.
5. If the **Additional Information** dialog box appears, complete the mandatory fields.
6. A message about the default staffing level appears. Click **OK** to proceed.
7. Click **Save**.
8. If you created tasks during this procedure, you should immediately roll up the project to ensure that the project information includes all of the task information. For more information, see "Rolling up a project" in the *Project Management User Guide*.

Create Project from Candidate dialog box options

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

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

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

About creating tasks from the service budget of an candidate

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

Task field	Field from service budget row
Name	**Function** (if specified) or **Staffing level**
Planned start	**Start date**
Planned finish	**End date**
Planned hours	**Hours**
Resource (task assignments)	**Resource**. If the resource is not specified or not available, then the default resource selected on the **Create Project from Candidate** dialog box is used.
Staffing level	**Staffing level**. If the staffing level of the candidate is different from the cost structure of the initiative, then the default staffing level selected on the **Create Project from Candidate** dialog box is used.

Copying tasks when creating a project from a candidate

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

1. Complete the top section of the **Create Project from Candidate** dialog box. For more information, see "Creating a project from a candidate" on page 55.
2. Select the **Copy tasks from existing project** option.
3. Complete the fields as required. For more information, see "Create Project from Candidate dialog box options" on page 56.
4. Click **Save**.
5. If the **Additional Information** dialog box appears, complete the mandatory fields.
6. If the **Validation Report** dialog box appears, the task assignments are causing one or more resources to be overbooked. Do one of the following:
   - To level the task assignments and correct the scheduling conflicts, click **Level all Tasks**.
   - To save the new project and task assignments with the conflicts, click **Accept**.

A message about the default staffing level appears.

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

8. Applications

About applications

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

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

Applications are grouped in application categories that can be nested within parent application categories.

Accessing an application category

1. Click **Program Management** > **Applications**.

   The **Applications** tree view displays the application categories.

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

   The application category profile appears.

Creating an application category

1. Click **New** > **Application category**.

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

2. Complete the fields as required. For more information, see "Create/Edit Application Category dialog box options" on page 62.

3. Click **Save**.

Create/Edit Application Category dialog box options

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

Editing an application category

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

   The **Edit Application Category** dialog box appears.
3. Make the necessary changes. For more information, see "Create/Edit Application Category dialog box options" on page 62.
4. Click **Save**.

Deleting an application category

When you delete a application category, all applications categories under this category are also deleted.

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

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

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

Accessing an application

1. Click **Program Management** > **Applications**.

   The **Applications** tree view displays the application categories.

2. Expand the application categories and select the application.

   The application profile appears.

Creating an application

1. Click **New** > **Application**.

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

2. Complete the fields as required. For more information, see "Create/Edit Application dialog, General tab options" on page 63.
3. Click **Save**.
4. To continue completing the application, see the following topics:
   - "Adding or removing a resource in the application team" on page 64
   - "Specifying the charge amount for an application" on page 65

Create/Edit Application dialog, General tab options

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

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

Adding or removing a resource in the application team

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

1. Do one of the following:

- Create a application.
- Access the application for editing.

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

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

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

      The resources are added to the team list.

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

Specifying the charge amount for an application

You can specify charge amounts in one or more currencies.

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

   A new row is added to the table.

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

Editing a application

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

   The **Edit Application** dialog box appears.
3. Make the necessary changes. For more information, see "Creating an application" on page 63.
4. Click **Save**.

Deleting an application

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

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

9. Scenario Comparisons Worksheet

About the scenario comparisons worksheet

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

- entities:
  - candidates
  - initiatives
  - requests
  - projects
- scenarios:
  - candidate scenarios
  - comparison scenarios
  - request scenarios
  - resource demand scenarios
- project portfolios

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

About editing fields in the scenario comparisons worksheet

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

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

- Some standard fields cannot be edited in the scenario comparisons worksheet. For a complete list of fields, see "Troubleshooting the scenario comparisons worksheet" on page 103.
- For the project entity, the **Comments** field is called **Description** in the scenario comparisons worksheet.

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

Creating a scenario comparison

1. Specify the items (entities, scenarios or project portfolios) whose data you want to include in the scenario comparison by creating a scenario comparisons filter, and then display the filter. For more information, see "About selecting items for a scenario comparison" on page 90.
2. Specify the data (from the items that you specified in the filter) that you want to include as columns in the scenario comparison by creating a scenario comparison view, and then display the view. For more information, see "About selecting the data for a scenario comparison" on page 79.
3. Display the filter and the view. The combination of the items from the scenario comparison filter and the data fields from the scenario comparison view make up the scenario comparison.

Scenario comparison worksheet basics

When you access the scenario comparisons worksheet for the first time, or if you have not specified a default scenario comparison filter, the **Manage Filters** dialog box appears. You must either select an existing filter or create a new filter to proceed. For more information, see "About selecting items for a scenario comparison" on page 90.

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

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

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

Accessing the scenario comparisons worksheet

1. Do one of the following:
   - Click **Program Management** > **Scenario Comparisons**.
   - Click **Resource Management** > **Scenario Comparisons**.
2. If the **Manage Filters** dialog box displays, do one of the following:
   - Select a filter from the **Filters** list and then click **Save**.
   - Create a new filter. For more information, see "Creating a scenario comparisons filter" on page 91.

   The scenario comparisons worksheet appears.

Accessing a scenario comparison

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

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

   The **Manage Filters** dialog box appears.
3. Do one of the following:
   - Select a filter from the **Filters** list and then click **Save**.
   - Create and display a new filter. For more information, see "Creating a scenario comparisons filter" on page 91.
4. To select or create a scenario comparisons view, click .

   The **Manage Views** dialog box appears.

5. Do one of the following:
   - Select a view from the **View** list and then click **Save**.
   - Create and display a new view. For more information, see "Creating a scenario comparisons view" on page 80.

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

About row totals in the scenario comparisons worksheet

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

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

About sorting columns in the scenario comparisons worksheet

You can temporarily rearrange the columns by clicking a column header and dragging it to a different position. However, you can change the order of the columns permanently by creating a scenario comparisons view. For more information, see "About selecting the data for a scenario comparison" on page 79.

About sorting rows in the scenario comparisons worksheet

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

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

About adjusting column width in the scenario comparisons worksheet

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

Selecting multiple rows in the scenario comparisons worksheet

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

To select a range of rows:

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

   The range of rows is highlighted.

To select nonconsecutive rows:

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

   The selected rows are highlighted.

Locking a row in the scenario comparisons worksheet

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

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

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

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

Unlocking a row in the scenario comparisons worksheet

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

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

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

About editing columns in the scenario comparisons worksheet

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

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

Before you can edit a configurable field, you must lock the row that the field is in. For more information, see "Locking a row in the scenario comparisons worksheet" on page 71.

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

About data errors in the scenario comparisons worksheet

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

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

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

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

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

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

About required fields in the scenario comparisons worksheet

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

About viewing lists in the scenario comparisons worksheet

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

For example:

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

Selecting multiple values in a list in the scenario comparisons worksheet

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

1. Click the cell.

   The cell becomes editable.

2. To view all of the values in the list, click the arrow or press **Enter**. For more information about reducing the number of values in the list, see "About viewing lists in the scenario comparisons worksheet" on page 73.

3. To select a range of consecutive values:

   a. Click the starting value for the range.

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

   c. Click anywhere outside the list.

4. To select multiple, nonconsecutive values:

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

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

   c. Click anywhere outside the list.

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

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

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

6. To save the values, click the .

Editing multiple values in a list in the scenario comparisons worksheet

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

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

   The current values in the cell are highlighted.

2. Click the arrow or press **Enter**. For more information about reducing the number of values in the list, see "About viewing lists in the scenario comparisons worksheet" on page 73.

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

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

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

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

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

8. To save the values, click .

Clearing values selected from a list in the scenario comparisons worksheet

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

1. Click the cell.

   The cell becomes editable.

2. Click the arrow.

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

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

   a. Click the cell to make it editable.

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

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

5. Click anywhere outside the list.

   The value is removed.

Using the date field in the scenario comparisons worksheet

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

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

   The date is changed.

Using the calendar icon in the scenario comparisons worksheet

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

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

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

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

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

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

d. Select the date. The date is changed.

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

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

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

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

d. Select the date. The date is changed.

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

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

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

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

To hide the what-if analysis data, click .

Copying a value to multiple cells in the scenario comparisons worksheet

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

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

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

1. If required, lock the rows that include the source and target cells. For more information, see "Locking a row in the scenario comparisons worksheet" on page 71.
2. Select the source and target cells.
3. Press **Ctrl+Alt+U**.

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

Saving the scenario comparisons worksheet

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

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

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

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

To save the scenario comparisons worksheet, click .

About printing the scenario comparisons worksheet

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

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

- Remove some of the columns from the scenario comparisons view. For more information, see "Creating a scenario comparisons view" on page 80.
- Export the scenario comparisons worksheet to Microsoft Excel and then print from Excel. For more information, see "Exporting a scenario comparison to Microsoft Excel" on page 79.

Exporting a scenario comparison to Microsoft Excel

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

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

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

1. Access the scenario comparison. For more information, see "Accessing a scenario comparison" on page 69.
2. Click .

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

About selecting the data for a scenario comparison

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

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

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

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

For information about creating a scenario comparisons view, see "Creating a scenario comparisons view" on page 80.

About differences between entity fields and worksheet columns

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

Initiative entity

In the scenario comparisons worksheet, the **Used address** field displays either the main address, cross charge address, or shipping address of either the client or the main contact, depending on the values that are selected for the cross charge address on the **Cross charge information** tab of the **Initiative** dialog box.

Candidate entity

The **Non-labor item** field in the **General** tab of the **Candidate** dialog box is called the **Application** column in the scenario comparisons worksheet.

Creating a scenario comparisons view

For more information, see "About selecting the data for a scenario comparison" on page 79 and "Editing a scenario comparisons view" on page 89.

1. Access the scenario comparison.
2. Click .

The **Manage Views** dialog box appears.

3. From the **View** list, select **New View**.
4. In the **Name** field, enter a name for the view.
5. From the **Currency** list, select the currency that the monetary amounts in the totals and fiscal period columns will be displayed in.
6. To allow other resources to use this view, select the **Share the view** check box.
7. To set this view as your default view, select the **Set as default** check box.
8. Do one of the following:
   - To specify the scenario amounts, go to "Specifying scenario amounts for a scenario comparisons view" on page 84
   - To save the view and edit another view, click **Apply**.
   - To save and display the view in the worksheet, click **Save**.

Manage Views dialog box (SCW) options

Option	Description
View list	Name of the current scenario comparisons view.
Name field	New name for the scenario comparisons view.
Currency list	All monetary amounts in the totals and fiscal period columns in the worksheet will be converted to the selected currency.
Share the view check box	When selected, allows other resources to use the scenario comparisons view.
Set as default check box	When selected, makes the current scenario comparisons view the default view for the current resource.

Option	Description
Include actuals check box	When selected, includes the actual amounts in the totals for the effort, cost, revenue and margin. When you include actuals, the totals for the fiscal years that have dates in the past will include all actuals amounts that occurred during those past dates. For example, if you are doing an analysis in September, but you want to see the costs for the whole year, you would select this check box to include the actuals from January to September in the totals.
Fiscal years list	List from which you select the fiscal periods to be included in the scenario. The order of the fiscal years in the list from top to bottom is the order that they display in the scenario comparisons view from left to right. You can change the order by dragging them to different positions.
Scenario amounts list	List from which you select the types of amounts to be included in the scenario. The order of the amounts in the list from top to bottom is the order that they display in the scenario comparisons view from left to right. You can change the order by dragging them to different positions. **Note:** When you select one or more of the amounts, the **Scenario amount** column is automatically added to the **Show/hide column** list.
Effort check box (in Scenario amounts)	When selected, includes the estimated effort amounts in the scenario.
Cost check box (in Scenario amounts)	When selected, includes the costs in the scenario.
Revenue check box (in Scenario amounts)	When selected, includes the revenue in the scenario.
Margin check box (in Scenario amounts)	When selected, includes the margins (revenue minus costs) in the scenario.

Option	Description
Entity type list	List from which you select an entity to display its fields in the **Show/hide columns** list.
Frozen columns list	List of columns that will remain in place even when you scroll the worksheet horizontally. The order of the columns in the list from top to bottom is the order that the columns display in the scenario worksheet from left to right.
Show/hide columns list	List of available columns. When the check box for a column is selected, the column displays in the scenario comparisons worksheet. The order of the columns in the list is the order that the columns display in the scenario worksheet from left to right. **Note:** • The **Scenario** check box controls whether the scenarios that are specified in the **Manage Filters** dialog box are displayed. • If you select one or more amounts from the **Scenario amounts** list, the **Scenario amounts** column in the **Show/hide columns** list is automatically selected. If you do not want fiscal amounts in your view, you can clear the amounts from the **Scenario amounts** list and then the **Scenario amounts** column in the **Show/hide columns** list. • There are some differences between entity fields and worksheet columns. For more information, see "About differences between entity fields and worksheet columns" on page 80.
Numeric Formats button	Displays the **Numeric Formats** dialog box, which provides the following options for formatting the numeric data in the scenario comparisons worksheet: • **Display units** – You can change the display units for large numbers or amounts to: **As-is**, **By thousands** or **By millions**. • **Decimal places** – You can select the number of decimal places (up to three) to be shown after the decimal point.

Specifying scenario amounts for a scenario comparisons view

For more information about the fields in this procedure, see "Editing a scenario comparisons view" on page 89.

1. Create a scenario comparisons view.
2. To include actual amounts in the selected scenario amounts for the selected fiscal years, select the **Include actuals** check box.
3. In the **Fiscal Years** list, do the following:
   - Select the check boxes for the fiscal years that you want to include.
   - To include a column that includes the totals of all fiscal years (not just the fiscal years that you selected), select the **Total** check box.
   - To change the order that the fiscal years are displayed in the view, drag the fiscal years to the appropriate position in the list.
4. In the **Scenario amounts** list, do the following:
   - Select the check boxes for the amounts that you want to include.
   - To change the order that the amounts are displayed in the view, drag them to the appropriate position in the list.
5. To specify formats for the scenario amounts, see "Specifying numeric formats for columns in a scenario comparisons view" on page 88.
6. Do one of the following:
   - To specify the columns, go to the "About specifying columns for a scenario comparisons view" section on page 84.
   - To save the view and edit another view, click **Apply**.
   - To save and display the view in the worksheet, click **Save**.

About specifying columns for a scenario comparisons view

To specify the columns for a scenario comparisons view, you first select the entity (from the **Entity type** list) that includes the fields that you want to display as columns in the scenario comparisons worksheet. You have the option of selecting from the default fields only or from

both default and configurable fields for the entity. You can also select from the configurable fields that are shared by two or more entities.

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

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

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

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

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

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

The columns display left to right on the worksheet in the order that they are listed from top to bottom in the **Frozen columns** and **Show/hide columns** lists. For more information about the options in this procedure, see "Editing a scenario comparisons view" on page 89.

About scenario comparisons views with funding source data

You can add funding source data, which includes funding source, funding subsource, funding category and funding subcategory columns, to a scenario comparisons view. If you add any of the funding source columns to the view, the effort, cost, revenue and margin data will be

grouped per entity (project, request, candidate), based on the lowest level of funding source data currently displayed on the view.

You can then group by funding category (for example), which may split into multiple rows of data if funding source and funding subsource were included in the view. Due to the possibility of data being split, you cannot update data when any of the funding-related columns are displayed in the worksheet. To update the data, you must switch to a view without any funding source information displayed and therefore there is only one row of data per entity.

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

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

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

Name	Effort hours
Project A	700

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

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

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

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

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

Specifying columns in a scenario comparisons view

Some entity fields have different column names in the scenario comparisons worksheet. For more information, see "About differences between entity fields and worksheet columns" on page 80.

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

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

   Tip: You can also select and drag columns from one list to the other.
7. To remove a column from the **Frozen columns** list, select the column in the **Frozen columns** list and then click the right arrow button (>).

8. To change the order of the columns, select a column name and drag it to the desired position in the list.
9. To remove all columns from the **Frozen columns** list, click the double right arrow button (>>).

   All columns except **Name** are moved to the **Show/hide columns** list.
10. When you are finished, do one of the following:
    - To specify numeric formats for the amount columns in the view, go to the "Specifying numeric formats for columns in a scenario comparisons view" section on page 88.
    - To save the view and edit another view, click **Apply**.
    - To save and display the view in the worksheet, click **Save**.

Specifying numeric formats for columns in a scenario comparisons view

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

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

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

Editing a scenario comparisons view

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

1. Access the scenario comparison.
2. Click .

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

Deleting a scenario comparisons view

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

1. Access the scenario comparison.
2. Click .

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

   The default system view is selected.
7. Do one of the following:
   - To edit or delete another view, select the view.

- To display the system view in the worksheet, click **Save**.
- To display a different view, select the view and then click **Save**.

About selecting items for a scenario comparison

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

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

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

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

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

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

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

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

For more information, see the following sections:

- "Creating a scenario comparisons filter" on page 91
- "Adding entities to a scenario comparisons filter" on page 93
- "About adding other scenarios to a scenario comparisons filter" on page 93
- "Adding project portfolios to a scenario comparisons filter" on page 95

Creating a scenario comparisons filter

1. Access the scenario comparisons worksheet.
2. Click .
3. The **Manage Filters** dialog box appears.
4. In the **Filter** list, select **[New filter]**.
5. In the **Name** field, enter a name for the filter.
6. To apply the filter automatically to all scenario comparison views, select the **Set as default** check box.
7. Do one or more of the following:
   - To add entities, see "Adding entities to a scenario comparisons filter" on page 93
   - To add scenarios, see "About adding other scenarios to a scenario comparisons filter" on page 93
   - To add project portfolios, see "Adding project portfolios to a scenario comparisons filter" on page 95
8. When you are finished, do one of the following:
   - To save the filter and keep the **Manage Filters** dialog box open, click **Apply**.
   - To save the filter and display it in the worksheet, click **Save**.

Manage Filters dialog box (SCW) options

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

Adding entities to a scenario comparisons filter

For more information about scenario comparisons filters, see "About selecting items for a scenario comparison" on page 90

For more information about the options in this procedure, see "Manage Filters dialog box (SCW) options" on page 92.

Some entity fields have different column names in the scenario comparisons worksheet. For more information, see "About differences between entity fields and worksheet columns" on page 80.

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

About adding other scenarios to a scenario comparisons filter

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

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

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

For more information about scenario comparisons filters, see "About selecting items for a scenario comparison" on page 90.

For more information about the options in this procedure, see "Editing a scenario comparisons view" on page 89.

Adding other scenarios to a scenario comparisons filter

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

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

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

Adding project portfolios to a scenario comparisons filter

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

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

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

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

Editing a scenario comparisons filter

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

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

1. Access the scenario comparison.
2. Click .

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

Deleting a scenario comparisons filter

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

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

About comparison scenarios

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

Creating a comparison scenario

1. Access the scenario comparison.
2. Click .

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

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

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

Editing a comparison scenario

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

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

Renaming a comparison scenario

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

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

Deleting a comparison scenario

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

Note: Use this procedure only if you want to delete the comparison scenario permanently. If you want to simply remove the comparison scenario from the current scenario comparison, you must edit the scenario comparisons filter. For more information, see "Editing a scenario comparisons filter" on page 95.

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

About what-if analysis of comparison scenarios

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

About budget-based data

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

Prorating of what-if data

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

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

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

About using the RMW from a comparison scenario

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

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

Adding and removing demand Items

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

Display of what-if analysis data

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

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

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

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

Using the RMW from a comparison scenario

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

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

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

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

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

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

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

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

About using resource demand scenarios from a comparison scenario

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

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

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

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

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

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

Using resource demand scenarios from a comparison scenario

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

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

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

Troubleshooting the scenario comparisons worksheet

Values disappear when rows are locked

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

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

Value for a configurable field does not refresh

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

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

You cannot edit a configurable field

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

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

Values are not displayed in cost and margin columns

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

Scenarios are not displayed in the worksheet

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

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

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

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

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

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

You cannot edit a standard field

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

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

Project fields that cannot be edited in the scenario comparisons worksheet

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

- Cost structure
- Created on
- Created by
- Customer
- Initiative
- Rollup forecast start
- Rollup forecast finish
- Funding category
- Funding source
- Funding subcategory
- Funding subsource
- Is a subproject
- Originating request
- Initiative currency
- Project manager
- Rollup remaining hours
- Date of last rollup
- Updated by
- Updated on

Candidate fields that cannot be edited in the scenario comparisons worksheet

- Cost structure
- Cross charge type
- Created by
- Created on
- Client

- Currency
- Fiscal period
- Funding category
- Funding source
- Funding subcategory
- Funding subsource
- Initially proposed start
- Updated by
- Updated on

Initiative fields that cannot be edited in the scenario comparisons worksheet

- Chargeable
- Cost structure
- Cross charge type
- Created by
- Created on
- Client
- Expense cross charge type
- Candidate
- Maximum recognizable revenue
- Updated by
- Updated on

Request fields that cannot be edited in the scenario comparisons worksheet

- Created by
- Created on
- Client

- Initiative
- Funding category
- Funding source
- Funding subcategory
- Funding subsource
- Initiator
- Request cross charge type
- Request number
- Updated by
- Updated on

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

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

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