

Title: Managing Project/Program Funding Using Unifier

#	Question	Answer
1	The workflow that you showed for the approval of funding. Was that a custom built workflow or out of the box?	The workflow for approval of funding was one we named called "Fund Appropriations CBS" this is a workflow out of the box ; it is found in the base Project Controls Configuration of Unifier and by choosing Cost Type BP Sub-Type " Line items with both CBS and Fund Codes"
2	Is there a way of integrating P6 schedules with Unifier and pushing actual costs from P6 to Unifier? This is assuming that the schedule is cost and resource loaded.	Yes, you can integrate P6 Schedules with Unifier and push the actual costs from P6 to Unifier. If the schedule is cost and resource loaded ; the integration is set up between Unifier and P6 using Gateway, and you push the actual cost that has been calculated in P6 to the unifier Activity Sheet, you can then calculate cash flow and compare planed cost vs actual and crate cash flow and EV curves.
3	How is contingency handled in the case of changes and who has the ownership of contingency buckets?	Contingency is handled in the case of changes I'm assuming that you need to draw down from a contingency fund that may be controlled at the enterprise level in a fund category - or if you put the contingency in an area in the Project level budget such as a CBS/WBS "contingency" cost category when you approved the budget you will need to do budget change to request more budget from the contingency fund at the enterprise level that can be done with a Fund Appropriation BP – or do a budget transfer and move the money you need from the CBS/WBS "contingency" cost category to the other cost categories where it needs to be allocated to.
4	Who handles approvals or is it defined in business process?	By "handles approvals" do you mean by who is the person who does the approval in the business process; if so then its the person(or group) who is assigned at the step in the business process that the approval is to be executed. The Workflow part of the business process can be configured to handle approvals. Workflows can be configured to be handle approvals with individual user or a group of people. The approval policy can be Single, All-majority or All consensus.

5	Can a delegation of authority be included in items such as the \$100M distribution? Is it a function or level within the organization with threshold levels or business practices?	Yes a delegation of authority can be include in items such as the \$100M Distribution ; it can be set up as a function level within the organization if you wish to do this by groups and assign those authoritative groups at steps in the process ; you may also use threshold levels to direct the delegation of authority to a certain authority figure based upon the threshold level; you may also build logic into your Business process form allowing the users to pick or determine the direction of the delegation of authority to whom it should go to next in the process
6	Do the schedule of values tie in with the rules of credit?	In order to be able to tie in rules of credit with the schedule of values (SOV) you may first want to create a SOV Template with your rules of credit formulas/calculations so that when the SOV sheet that is auto-created from a Cost Type BP such as the approval of a Contract; the SOV template that was created with your desired credit rules will apply to the columns that will appear on the automatically created SOV sheet; if the idea here is to have a certain percentage of the commitment from SOV be given some rules of credit criteria.
7	Is there a set number of approvals needed on the Pay Apps?	No, you the user may determine how many number of approvals is needed on Pay Apps based upon your business requirement.
8	Can any of what you showed be tied in from project estimates?	Yes, if you wanted to create a project estimate there is a "Estimates" base configuration BP that is used to create multiple project estimates and identify the preferred scenario. You could also create an manual Estimates column in the cost sheet and enter the data there to compare scenarios ; as well as bring in your project estimates numbers into Unifier activity sheet in a column you create called "Estimates" from P6, perhaps after you work with WinEst or Hard Dollar estimating tools in conjunction with P6.

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How does Unifier handle Forecasting?

Forecasting can be done by creating a formula (custom made) in a column in the Cost Sheet for forecasts, along with your data sources that are limited to business processes flagged in uDesigner for cost sheet forecasting. An example could be, if base commits and change commits were enabled for cost sheet forecasting, you will see base commits (unaccepted) and change commits (unaccepted) as available data sources for use in the forecasts (custom) formula. Also Forecasting can be configured in Cash Flow module as well.

Unifier also handles some project forecasting in the Portfolio manager ; in doing forecasting for capital planning a Project manager could work with a planning manager/finance to create multiple scenarios, by creating a "template" for the sheets that planners can use to create the scenarios for analyzing and forecasting capital budgets;

Budget forecast planners are able to gather cost and schedule information on projects (both planned and in execution) and perform analyses on "what if" scenarios. These scenarios are used to propose an optimal mix of projects for a portfolio, based on available budget targets and the strategic goals of the company.

Portfolio planners can create a portfolio for a specific "planning horizon" (for example, from 2015 through 2022) and then create multiple scenarios in that portfolio. Each scenario can use forecast numbers and actuals, as well as schedule dates, for both planned and active projects in a specific shell type across a hierarchy in the company(enterprise)