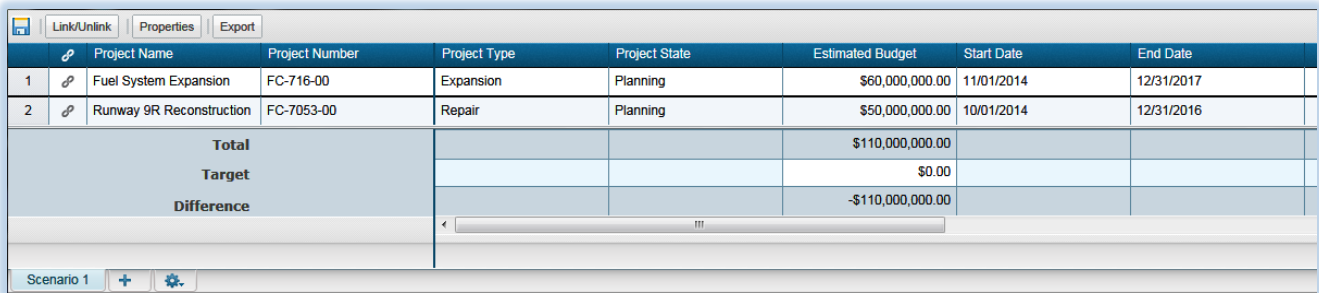


TECH TIP

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET ORACLE PRIMAVERA UNIFIER

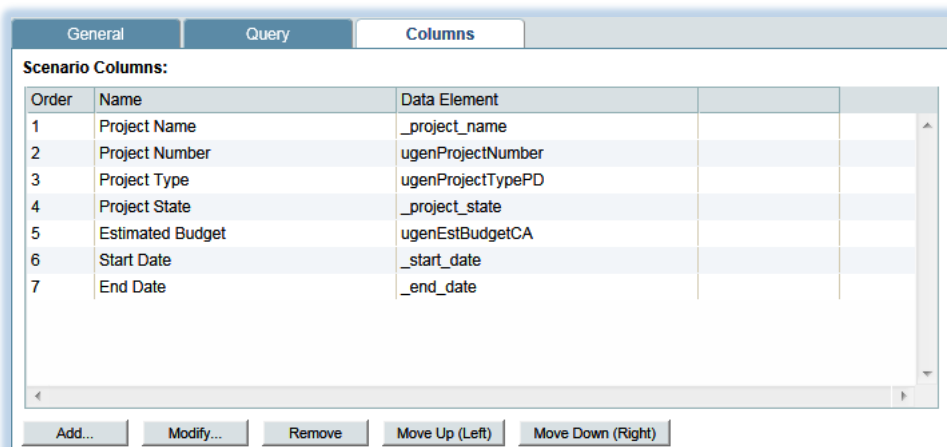
The budget forecast planner may need to gather additional information about projects to perform the analysis on “what if” scenarios in the Portfolio Manager. This tech tip outlines the steps required to include additional information in the Portfolio’s Scenario Sheets.

The base product Portfolio Manager by default has columns already included in the Scenario Sheet. The columns that can be included are Data Elements from the Shell Attribute Form.



	Project Name	Project Number	Project Type	Project State	Estimated Budget	Start Date	End Date
1	Fuel System Expansion	FC-716-00	Expansion	Planning	\$60,000,000.00	11/01/2014	12/31/2017
2	Runway 9R Reconstruction	FC-7053-00	Repair	Planning	\$50,000,000.00	10/01/2014	12/31/2016
Total					\$110,000,000.00		
Target					\$0.00		
Difference					-\$110,000,000.00		

The Columns tab in the Configuration of the Portfolio Manager displays the columns added to the Scenario Sheet. Adding additional Data Elements to the Shell Attribute Form will make them available for adding in the Scenario Sheet.



Order	Name	Data Element
1	Project Name	_project_name
2	Project Number	ugenProjectNumber
3	Project Type	ugenProjectTypePD
4	Project State	_project_state
5	Estimated Budget	ugenEstBudgetCA
6	Start Date	_start_date
7	End Date	_end_date

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

What if there was information that needed to be gathered from a business process?

The Portfolio Manager also allows the inclusion of Data Elements from a single record business process. The example shown is a modification to the Project Information business process which includes a Benefits and Risks rating. These are pull-down menu Data Elements each with a range of number rating one through five.

The screenshot shows a software window titled "Project Information" with a menu bar (File, Edit, View, Help) and a toolbar (Finish Editing, Save, Spelling, Add Attachment, Close Window). The form is divided into three sections: "Project Information" with a "Project Type" dropdown set to "Repair"; "Description" with a "Description" text area containing "Repair End of Runway" and a "Justification" text area containing "Resolve cracking"; and "Benefits & Risks Ratings" with "Benefits Rating" and "Risks Rating" dropdown menus set to "1" and "2" respectively.

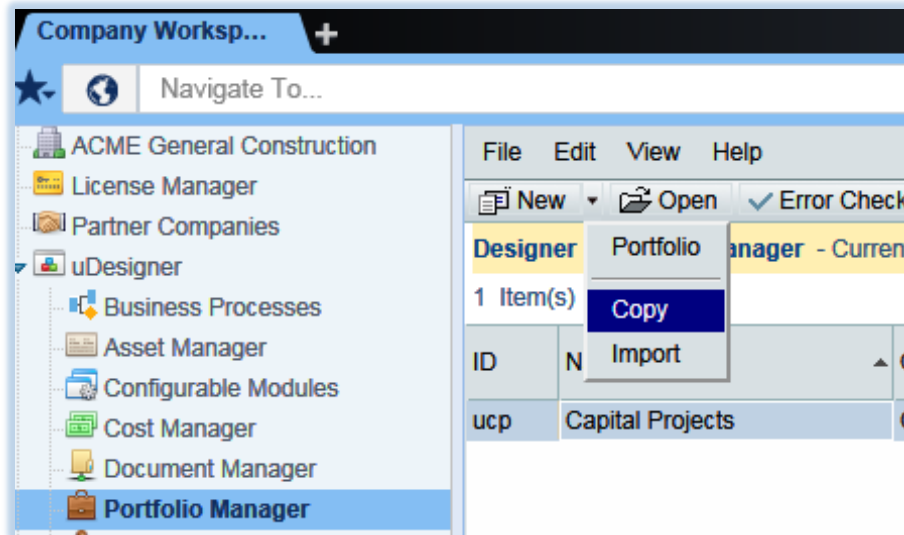
The base product Portfolio Manager will not allow the inclusion of Data Elements from a single record business process since this has to be defined at the initial configuration.

Note the Additional Attributes From selection in the General Configuration section of the General tab is greyed out.

The screenshot shows the "General" tab of the "Capital Projects - General Configuration" dialog. It features a "Status" section with "Active" selected, and two dropdown menus: "Include Projects of Type" set to "Projects" and "Additional attributes from" set to "-Select-". The "Additional attributes from" dropdown is greyed out, as indicated by the text in the preceding paragraph.

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

A new Portfolio Manager is required. This example will use a new Portfolio Manager which will be a copy of the base product one. In uDesigner > Portfolio Manager select the default Portfolio Manager "Capital Projects" and select New > Copy.

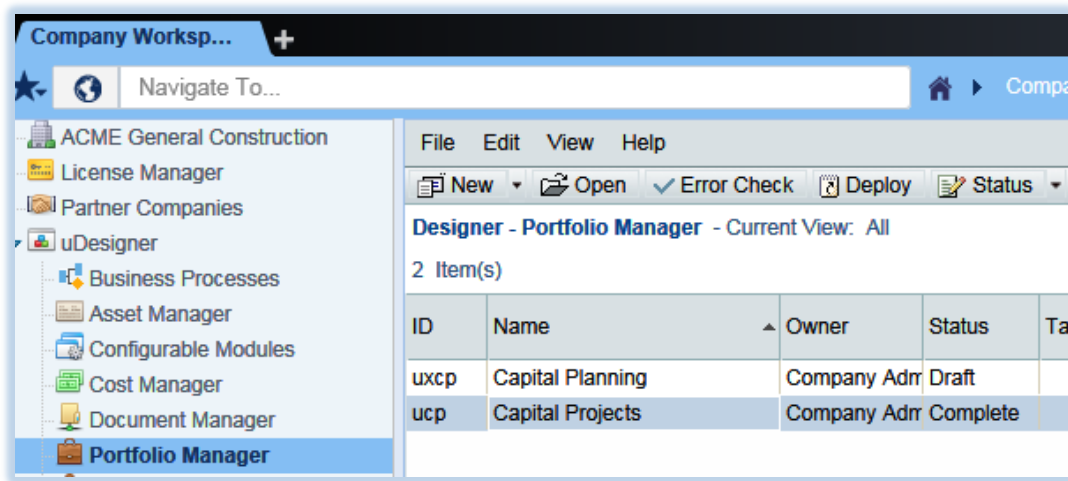


Add in the appropriate ID and Name.

The screenshot shows the 'General' tab of a form. It contains the following fields: 'ID:' with a text box and a red asterisk; 'Name:' with a text box and a red asterisk; 'Description:' with a large text area; 'Type:' with a dropdown menu showing 'Capital'; and 'Level:' with two radio buttons, 'Company' (selected) and 'Project/Shell'.

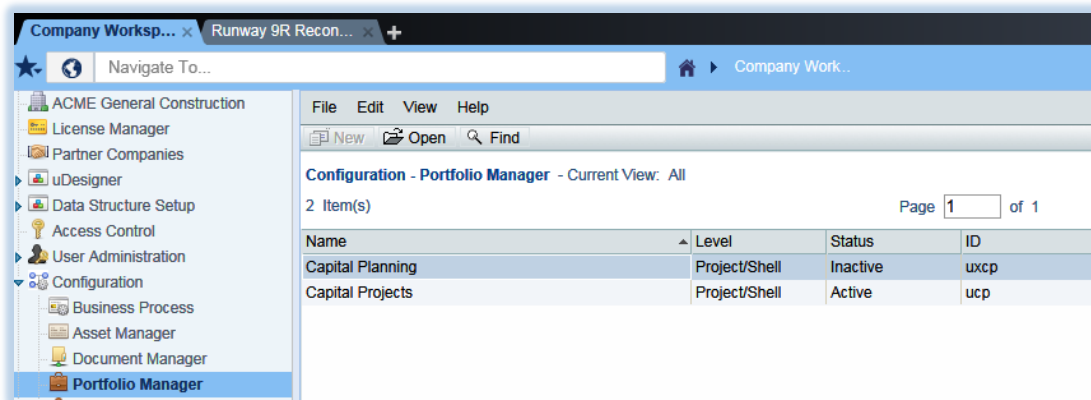
ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

In this example the new Portfolio Manager created is called 'Capital Planning'.



This new "Capital Planning" Portfolio Manager needs to be deployed by changing the Status to "Complete" and selecting Deploy.

Once deployed the new Portfolio Manager can be configured from Configuration > Portfolio Manager.



ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

Open "Capital Planning" and in the General tab the Additional Attributes From selection is now enabled. This will display a list of available single business processes. This example will use information from the "Project Information" business process.

General Query Columns

Capital Planning - General Configuration

Status: ☐ Active ☒ Inactive

Include Projects of Type: -Select-

Additional attributes from: -Select-
Project Information

Yearly Planning

Period Structure: -Select-

Projects are in Planning when in the following phases
Planning Phases: Select...

Projects added to a scenario are initially: ☐ Linked - values are updated as project data changes
☒ Unlinked - values are copied and do not change

Project Data Sources

Start Date: -Select-
☐ Update project start date upon approval

End Date: -Select-

Budget Source: -Select-

Forecast Source: -Select-

Apply OK Cancel

The rest of the selections in the General and Query tabs are filled out with the same configuration set up as the base product Portfolio Manager.

General Query Columns

Capital Planning - General Configuration

Status: ☐ Active ☒ Inactive

Include Projects of Type: Projects

Additional attributes from: Project Information

Yearly Planning

Period Structure: Jan to Dec Planning Period

Projects are in Planning when in the following phases
Planning Phases: Preplanning, Planning Select...

Projects added to a scenario are initially: ☒ Linked - values are updated as project data changes
☐ Unlinked - values are copied and do not change

Project Data Sources

Start Date: Projects / Project Start Date
☒ Update project start date upon approval

End Date: Projects / Project End Date

Budget Source: Baseline

Forecast Source: Forecast

Apply OK Cancel

General Query Columns

Query Condition:

Data Element	Condition	Value(s)
Projects / Status	equals	Active

Add... Modify... Remove

Projects

☒ Auto-add/auto-remove projects to and from the portfolio based on the query
(Changing this option only applies to new portfolios)

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

The same columns will be added in the Columns tab using the Add button.

Order	Name	Data Element
1	Project Name	_project_name
2	Start Date	_start_date
3	End Date	_end_date

Default Sorting

Initial Sort Column: Project Name
Sort Order: Ascending
Freeze column up to: 1

Planning Horizon

Number of years planning: 5
Number of years planned in months: 0

Notice how the list of available Data Elements will include those from the Project Information business process.

Column Properties

General

Name:
Data Element: -Select One-

Data Format

Show Percentage: ☐
Decimal Places:

Properties

Total:
Position Column After: Project Information / Benefits Rating

Project Updates

Enable Column Editing: ☐
Update source element upon approval: ☐

Dependent on the Data Element the Project Updates section can be enabled. This will allow changes in the column value in addition to updating the Data Element from its source.

Project Updates

Enable Column Editing: ☒
Update source element upon approval: ☒

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

This will be list of columns which will be seen in the Scenario Sheet. Note the inclusion of the Benefits Rating and Risks Rating Data Elements from the Project Information business process.

The screenshot shows a configuration window with three tabs: 'General', 'Query', and 'Columns'. The 'Columns' tab is active, displaying a table of 'Scenario Columns'.

Order	Name	Data Element
1	Project Name	_project_name
2	Project Number	ugenProjectNumber
3	Project Type	ugenProjectTypePD
4	Project State	_project_state
5	Est. Budget	ugenEstBudgetCA
6	Benefits Rating	BenefitsRatingPD
7	Risks Rating	RisksRatingPD
8	Start Date	_start_date
9	End Date	_end_date

Below the table are buttons: 'Add...', 'Modify...', 'Remove', 'Move Up (Left)', and 'Move Down (Right)'.

Default Sorting

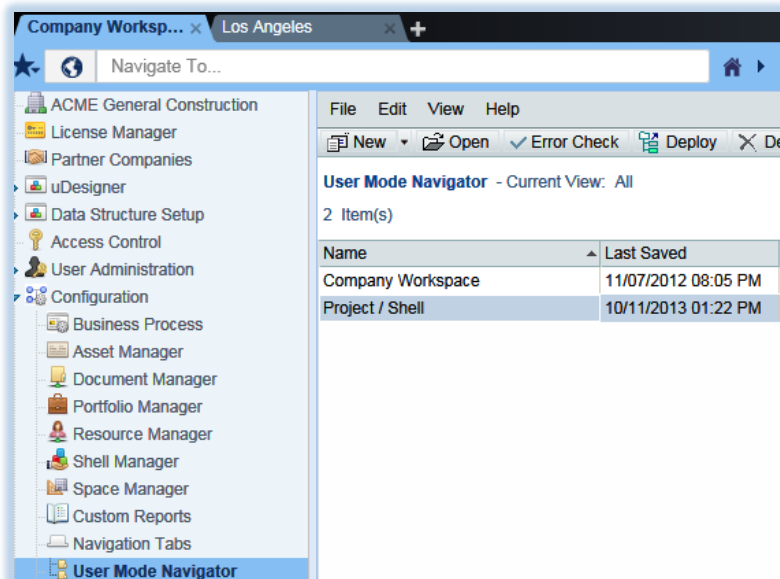
Initial Sort Column: Project Name
Sort Order: Ascending
Freeze column up to: 1

Planning Horizon

Number of years planning: 5
Number of years planned in months: 1

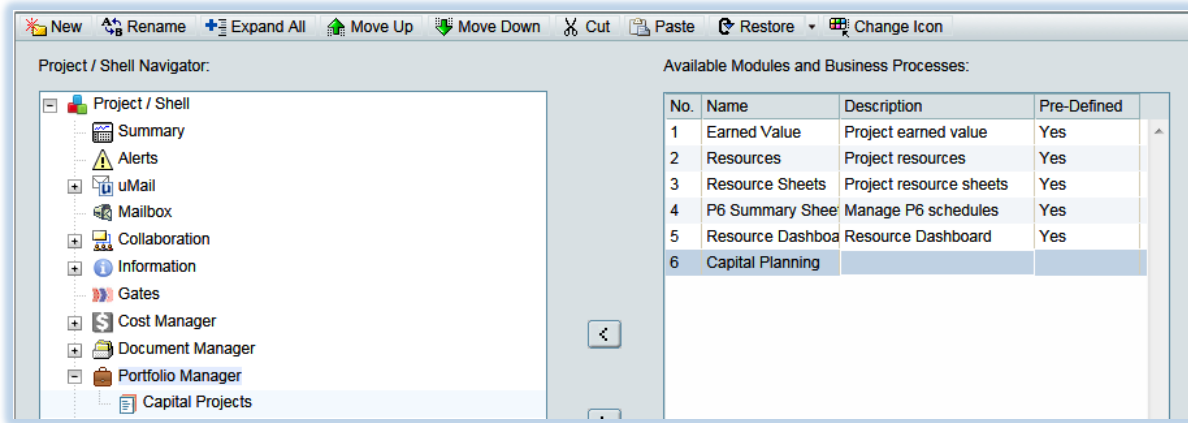
Ensure that the configuration is set to Active in the General tab so the new Portfolio Manager can be included in the User Mode Navigator. This will allow the new Portfolio Manager to be included in the module.

From Configuration > User Mode Navigator open the Project/Shell Navigator.

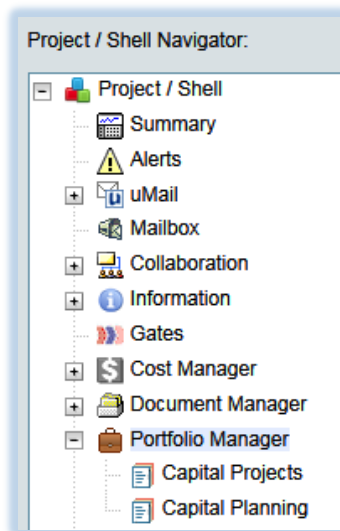


ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

The new Portfolio Manager(Capital Planning) can be seen in the Available Modules pane. Select Portfolio Manager from the Navigator pane, select Capital Planning and click the Left Arrow icon button in between the two panes.



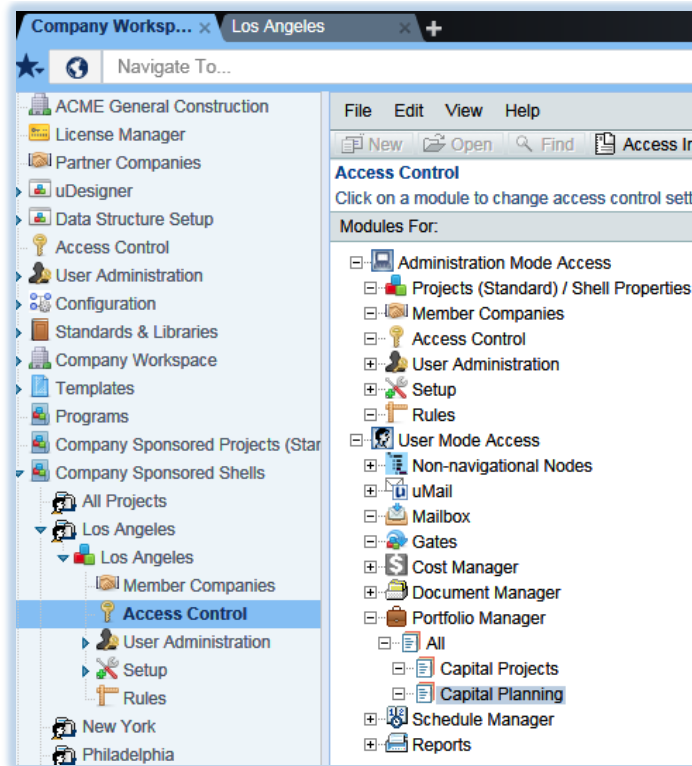
The resulting Portfolio Manager will now include Capital Planning.



ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

Close the Navigator window and Deploy the Project/Shell Navigator.

Once the Navigator has been deployed the permissions need to be set up for the new Portfolio Manager for the appropriate shell. In this example the permissions are set from Company Sponsored Shells > Shell > Access Control.



Permissions Setting for: **Capital Planning**

Select Users/Groups

First Name	Last Name	Company/Manager
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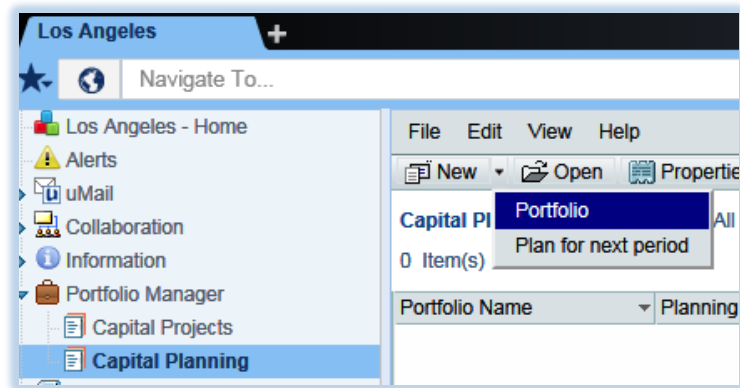
Add Users/Groups

Permission Settings:

- ☐ Full Access
- ☐ Create
- ☐ Modify
- ☐ View

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

From the appropriate *shell* in User Mode go to the Portfolio Manager module and select newly created one. Click New > Portfolio.



Add the appropriate Portfolio Name and Planning Period.

A screenshot of a form titled "General" and "Options". The form contains several input fields: "Portfolio Name" with the value "LA Capital Planning", "Planning Period" with the value "2015", "Creation Date" (empty), "Creator" with the value "Company Administrator", and "Planner Comments" (empty). There are red asterisks next to the "Portfolio Name" and "Planning Period" fields, indicating they are required. The "Creation Date" field is disabled, showing a light gray background.

ADDING DATA ELEMENTS TO PORTFOLIO MANAGER SCENARIO SHEET

Open the newly created Portfolio which will show all columns that were included from the configuration. This data will be pulled from the relevant projects.

<div> Link/Unlink <div>Properties</div> <div>Export</div> </div>										
	Project Name	Project Number	Project Type	Project State	Estimated Budget	Benefits Rating	Risks Rating	Start Date	End Date	Pre-A
1	Fuel System Expansion	FC-716-00	Expansion	Planning	\$60,000,000.00	2	3	11/01/2014	12/31/2017	
2	Runway 9R Reconstruction	FC-7053-00	Repair	Planning	\$50,000,000.00	1	2	10/01/2014	12/31/2016	
Total					\$110,000,000.00					
Target					\$0.00					
Difference					-\$110,000,000.00					

Scenario 1

Since the Columns showing the Project Information Data Elements were enabled for editing in the configuration, the planner is also able to modify these values from the Scenario Sheet.

Estimated Budget	Benefits Rating	Risks R
\$60,000,000.00	2	3
\$50,000,000.00	1	2
\$110,000,000.00	2	
\$0.00	3	
-\$110,000,000.00	4	
	5	