

HP Project and Portfolio Management Center

Software Version: 7.5

HP Portfolio Management Configuration Guide

Document Release Date: June 2008

Software Release Date: June 2008



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1 Getting Started with HP Portfolio Management Configuration

Introduction to HP Portfolio Management

HP Portfolio Management is an HP Project and Portfolio Management Center (PPM Center) application that provides a real-time view of your organization that supports your strategic, financial, functional, and technical governance requirements. HP Portfolio Management helps you align your IT portfolio—the collection of proposals, current projects, and established assets—with your business strategy and thereby maximize the portfolio’s value, for both new initiatives to expand and transform your business and existing applications that run your business.

HP Portfolio Management allows business and IT stakeholders to collaboratively govern your portfolio with appropriate levels of review and approval. It monitors the entire portfolio life cycle—proposal justification and review, project initiation, execution, deployment, and benefits realization. It enables stakeholders to make better portfolio decisions by analyzing what-if scenarios using easy-to-build scenario comparisons, including running automated portfolio optimizations according to objectives you specify.

Chapter 1, [Getting Started with HP Portfolio Management Configuration](#), on page 9 (this chapter) provides an introduction to configuring HP Portfolio Management and a list of other information related to HP Time Management.

Overview of Configuring HP Portfolio Management

HP Portfolio Management can be configured in the following ways:

- You can configure preferences that apply throughout HP Portfolio Management for the tracking of categorization by project class and asset class and for the tracking of financial metrics—return on investment (ROI), net present value (NPV), and a custom value, as described in [Chapter 2, *Configuring Global Portfolio Management Settings*, on page 13](#). (You define the custom value as described in [Chapter 5, *Configuring a Custom Financial Metric*, on page 45](#).)
- You can customize the proposal, project, and asset entities provided with HP Portfolio Management, and you can create new custom entities, as described in [Chapter 3, *Customizing HP Portfolio Management Entities*, on page 17](#).
- You can use the processes (workflows) provided with HP Portfolio Management, and you can customize them to suit your business needs, as described in [Chapter 4, *Customizing HP Portfolio Management Processes*, on page 33](#).
- You can define a custom financial metric of your choosing to measure the success of your portfolio, as described in [Chapter 5, *Configuring a Custom Financial Metric*, on page 45](#).
- You can use the qualitative scoring key provided with HP Portfolio Management to rate entities, and you can customize the scoring key to suit your business needs, as described in [Chapter 6, *Adjusting the Scoring Key*, on page 49](#).
- You can use licenses, security groups, and access grants to control the HP Portfolio Management capabilities provided to users, as described in [Chapter 7, *Configuring Licenses, Security Groups, and Access Grants*, on page 65](#).

- As described in [Chapter 2, *Configuring Global Portfolio Management Settings*, on page 13](#), you can specify whether to display return on investment (ROI) and net present value (NPV) in various contexts. [Appendix A, *Financial Metrics*, on page 75](#), provides details about how HP Portfolio Management calculates these values.
- You can accommodate use of a fiscal year that differs from the calendar year. Timelines in budgets, benefits, and scenario comparisons are adjusted accordingly. See [Appendix B, *Changing Fiscal Years and Periods*, on page 79](#).

Related Information

The following documents also include information related to configuring HP Portfolio Management:

- *HP Portfolio Management User's Guide*
- *HP Demand Management Configuration Guide*
- *HP Project Management Configuration Guide*
- *System Administration Guide and Reference*
- *Security Model Guide and Reference*
- *HP-Supplied Entities Guide* (includes descriptions of all HP Portfolio Management portlets, request types, and workflows)

Other more general information of interest is available in the *Getting Started* guide.

2 Configuring Global Portfolio Management Settings

Overview of Configuring Global Portfolio Management Settings

This chapter discusses general settings that must be configured before using HP Portfolio Management. In order to track the overall performance of your portfolio in the ways that are meaningful to your organization, you can configure your desired tracking preferences and categorization preferences.

Setting Your Financial Metric Tracking Preferences

Select the financial information you would like HP Portfolio Management to track. You can track any combination of the following metrics related to your proposals, projects, and assets:

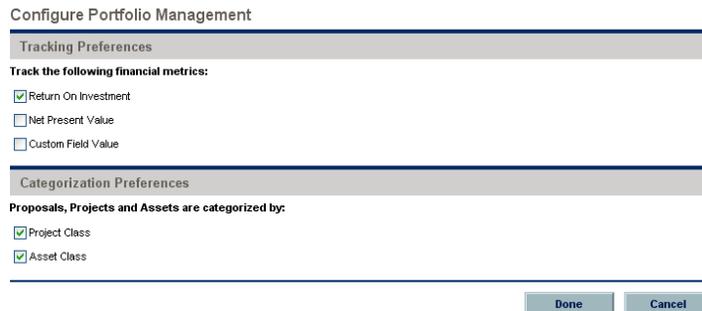
- **ROI (Return on Investment).** For a definition, see *Return on Investment (ROI)* on page 75.
- **NPV (Net Present Value).** For a definition, see *Net Present Value (NPV)* on page 75.
- **A custom value.** A custom value is a global value defined across the HP Portfolio Management installation that can be used in HP Portfolio Management visualizations. For more information on configuring the custom value, see *Configuring a Custom Financial Metric* on page 45.

The selected metrics are tracked and used for analyses throughout the HP Portfolio Management system. Only fields and graphics related to the selected metrics are displayed.

To specify the financial metrics to track in HP Portfolio Management:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portfolio Management > Configure Portfolio Management**.

The Configure Portfolio Management page opens.



The screenshot shows the 'Configure Portfolio Management' interface. It is divided into two main sections: 'Tracking Preferences' and 'Categorization Preferences'. Under 'Tracking Preferences', there are three checkboxes: 'Return On Investment' (checked), 'Net Present Value' (unchecked), and 'Custom Field Value' (unchecked). Under 'Categorization Preferences', there are two checkboxes: 'Project Class' (checked) and 'Asset Class' (checked). At the bottom right, there are two buttons: 'Done' and 'Cancel'.

3. Use the **Tracking Preferences** checkboxes to select the desired financial metrics.
4. Click **Done**.

Setting Your Categorization Preferences

You can arrange proposals, projects, and assets according to the following categories:

- Project Class
- Asset Class

The selected categories are tracked throughout the HP Portfolio Management system. Only the filter fields and graphs related to the selected categories are displayed.

To specify the categories to track in HP Portfolio Management:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portfolio Management > Configure Portfolio Management**.

The Configure Portfolio Management page opens.

The screenshot displays the 'Configure Portfolio Management' interface. It is divided into two main sections: 'Tracking Preferences' and 'Categorization Preferences'.
Under 'Tracking Preferences', the instruction 'Track the following financial metrics:' is followed by three checkboxes: 'Return On Investment' (checked), 'Net Present Value' (unchecked), and 'Custom Field Value' (unchecked).
Under 'Categorization Preferences', the instruction 'Proposals, Projects and Assets are categorized by:' is followed by two checkboxes: 'Project Class' (checked) and 'Asset Class' (checked).
At the bottom right of the form, there are two buttons: 'Done' and 'Cancel'.

3. Use the **Categorization Preferences** checkboxes to select the desired categories.
4. Click **Done**.

3 Customizing HP Portfolio Management Entities

Overview of Customizing HP Portfolio Management Entities

This chapter describes the default HP Portfolio Management proposals, projects, and assets. It also provides instructions for customizing HP Portfolio Management entities for use by your company or business unit.



Proposals, projects, and assets are the main entities, but not the only ones, that HP Portfolio Management works with. Hereafter in this document, for brevity, often the term “entity” is used to mean a proposal, a project, or an asset, and “entities” are any combination of proposals, projects, and assets.

HP Portfolio Management Entities

HP Portfolio Management supplies preconfigured entities for use in creating and maintaining your portfolio. These entities integrate with preconfigured life cycle processes also supplied with HP Portfolio Management, described in *HP Portfolio Management Processes* on page 33. They can be considered “best practice” and are ready to use. You can view and configure them using the Request Type Workbench.

Proposal

A proposal collects information needed to propose a project, which will become part of the portfolio. The proposal is processed as described in *PFM - Proposal Workflow* on page 34. When the proposal is approved, a corresponding project is automatically created. Any budget, financial benefit, or staffing profile attached to the proposal is copied, and the copies are attached to the project. See *Project* on page 22 for more details on the project.

For information about creating a proposal, see the *HP Portfolio Management User's Guide*.

Table 3-1 lists some of the default fields that are displayed for a proposal. You can use the Request Header Type Workbench to display other fields as needed by your company. For example, by default the **Net Present Value**, **Custom Field Value**, and **Discount Rate** fields are not displayed in the PFM - Proposal request header type (for definitions of these fields, see *Net Present Value (NPV)* on page 75, Chapter 5, *Configuring a Custom Financial Metric*, on page 45, and *Configuring a Custom Financial Metric* on page 46).

Table 3-1. Selected default proposal fields (page 1 of 2)

Field Name (*Required)	Description
Summary section	
Business Unit	The business unit from which this proposal originated.
Details section, Proposal Details subsection	
*Proposal Name	The name of the proposal.
Project Class	The class of project to which this proposal belongs (example: Innovation).
Asset Class	The class of asset to which this proposal belongs (example: Infrastructure).
Business Objective	The business objective with which the proposal is aligned.

Table 3-1. Selected default proposal fields (page 2 of 2)

Field Name (*Required)	Description
Details section, Business Case Details subsection	
Budget	The proposed budget for the proposal.
Expected Benefit	The monetary benefit the proposal would provide.
Staffing Profile	The resource demand of the proposal.
Return on Investment	(Read only) The ROI for the proposal. (For a definition, see Return on Investment (ROI) on page 75.)
Value Rating	(Read only) The total qualitative Value calculated for the proposal. (See Chapter 6, Adjusting the Scoring Key, on page 49.)
Risk Rating	(Read only) The total qualitative Risk calculated for the proposal. (See Chapter 6, Adjusting the Scoring Key, on page 49.)
Score Adjustment	The amount to adjust the calculated Value Rating – Risk Rating to obtain the Total Score . For more information, see Scoring Key Formulas (Rules) on page 53.
Total Score	(Read only) The total score (Value Rating – Risk Rating + Score Adjustment) calculated for the project.
Details section, Value Ratings subsection	
See Value and Risk Ratings on page 21.	
Details section, Risk Ratings subsection	
See Value and Risk Ratings on page 21.	

You can adjust certain properties of these fields in the usual way using the Request Types window, but other properties (such as their tokens) are essential to the functioning of HP Portfolio Management and cannot be revised.



You can modify the rest of the fields in this entity to suit your business needs. See [Customization Considerations on page 20](#) and [Creating Your Own HP Portfolio Management Entities on page 26](#) for more information on customizing HP Portfolio Management entities.

Customization Considerations

The following sections contain recommendations on changing the fields of the default proposal. For general recommendations on changing HP Portfolio Management entities, see *General Customization Considerations* on page 26.

For more detailed information on creating and modifying request type fields, see the *HP Demand Management Configuration Guide*.

Proposal Details

The **Proposal Details** subsection of the proposal provides summary information for the proposed project. HP Portfolio Management users should complete much of this section when the proposal is created. This section includes the sponsors of the project and the reasons why the project should be done (the business objective, who will benefit, and so forth).

Consider the following:

- Your company might have additional general information to be tracked about a proposed project. You can create these fields and add them to the **Proposal Details** subsection, although you should add no more than five to ten new fields. For a case where HP Portfolio Management should be up and running very quickly, these new fields should be for information only and should not be used to drive process, as process-oriented modifications involve changing the associated workflow and can take significant time to implement and test.
- Some of the default fields might not be relevant to the organization; for example, you might not need to know the vendors involved for a project. In such cases, the fields should be disabled, not deleted.
- The values for some of the fields (such as **Project Class**) might be changed to match the organization's current information by revising their validations. Note that changes to these validations propagate to other parts of HP Portfolio Management, such as the portlets.
- You can make additional fields required at any point throughout the process (the default request type keeps required fields to a minimum).

Business Case Details

As the proposal goes through the proposal process, the detailed business case must be fleshed out. This includes details on the budget, the staffing profile, and the expected benefits. Certain requirements and justification documents can also be attached in this section. Finally, this subsection contains the calculated totals of **Risk Rating** and **Value Rating**, as well as a field to adjust the automatically calculated score.

Consider the following:

- This subsection could have significant changes. The simplest of these changes would be to add or remove attachment fields if new or different documents are required for proposals.
- You can disable the business case fields if necessary, but HP recommends that you keep them enabled. Do not delete them. Even if not required, these are important pieces of information that a business unit should start gathering to fully understand a project and its expectations before approving it. Additionally, certain portlets use the information in these fields and cannot be used if the information is not completed.
- You can add fields to further describe the business case, although such fields are for information only. You can create fields that contribute to automatic **Risk Rating** or **Value Rating** calculations. See [Adjusting the Scoring Key on page 49](#) for more detailed information.

Value and Risk Ratings

This section lets an organization (usually an IT/Business Ops Council) rate the proposed project on a set of business criteria. Questions here are focused on the expected results of the proposed project as well as its alignment to company goals.

While the default criteria represent best-practice categories in valuing a project, you might want to add other criteria, remove criteria, or change the set of available values of the current fields. You might also want to change the weighting factors of the criteria. See [Adjusting the Scoring Key on page 49](#) for more detailed information.

Project

This entity tracks information and progress on a project as it is executed. The project is processed as described in *PFM - Project Workflow* on page 36.

When the project is completed, a corresponding asset is automatically created. Any financial benefit attached to the project is copied, and the copy is attached to the asset. See *Asset* on page 24 for more details on assets.



To create projects from scratch, users must have the Project Management license. However, even if a user does not have a Project Management license, HP Portfolio Management can automatically convert his proposals to projects (see *Automatically Creating a Project from a Proposal* on page 43).

For information about creating a project, see the *HP Portfolio Management User's Guide*.

Table 3-2 lists some of the default fields that are displayed for a project. They are among the fields that appear on a project's **Project Details** tab. You can use the Request Header Type Workbench to display other fields as needed by your company. For example, by default the **Net Present Value**, **Custom Field Value**, and **Discount Rate** fields are not displayed in the PFM - Project request header type (for definitions of these fields, see *Net Present Value (NPV)* on page 75, Chapter 5, *Configuring a Custom Financial Metric*, on page 45, and *Configuring a Custom Financial Metric* on page 46).

Table 3-2. Selected default project fields (page 1 of 2)

Field Name (*Required)	Description
Summary section	
Business Unit	The business unit from which this project originated.
Details section, Project Details subsection	
*Project Name	The name of the project.
Project Class	The class of project to which this project belongs (for example, Innovation).
Asset Class	The class of asset to which this project belongs (for example, Infrastructure).
Project Health	(Read only) The health of the project.

Table 3-2. Selected default project fields (page 2 of 2)

Field Name (*Required)	Description
Business Objective	The business objective with which the project is aligned.
Project Sponsor	The user sponsoring the project.
Project Manager	The manager of the project.
Details section, Business Case Details subsection	
Budget	(Read only) The budget for the project.
Financial Benefit	The monetary benefit the project provides.
Staffing Profile	(Read only) The resource demand of the project.
Return on Investment	(Read only) The ROI for the project. (For a definition, see Return on Investment (ROI) on page 75.)
Value Rating	(Read only) The total qualitative Value calculated for the project. See Chapter 6, Adjusting the Scoring Key, on page 49.
Risk Rating	(Read only) The total qualitative Risk calculated for the project. See Chapter 6, Adjusting the Scoring Key, on page 49.
Score Adjustment	The amount to adjust the calculated Value Rating – Risk Rating to obtain the Total Score . For more information, see Scoring Key Formulas (Rules) on page 53.
Total Score	(Read only) The total score (Value Rating – Risk Rating + Score Adjustment) calculated for the project.

You can adjust certain properties of these fields in the usual way using the Request Types window, but other properties (such as their tokens) are essential to the functioning of HP Portfolio Management and cannot be revised.



You can modify the rest of the fields in this entity to suit your business needs. See [Customization Considerations on page 24](#) and [Creating Your Own HP Portfolio Management Entities on page 26](#) for more information on customizing HP Portfolio Management entities.

Customization Considerations

If you want to add other project milestone and planning information to the project, HP recommends that you create a new section in the PFM - Project request type and add the new fields there.

For general recommendations on changing HP Portfolio Management entities, see *General Customization Considerations* on page 26.

For more detailed information on creating and modifying request type fields, see the *HP Demand Management Configuration Guide*.

Asset

This entity tracks information on a portfolio asset, typically a maintenance activity rather than a straightforward project execution. The asset is tracked as described in *PFM - Asset Workflow* on page 38.

For information about creating an asset, see the *HP Portfolio Management User's Guide*.

Table 3-3 lists some of the default fields that are displayed for an asset. You can use the Request Header Type Workbench to display other fields as needed by your company. For example, by default the **Net Present Value**, **Custom Field Value**, and **Discount Rate** fields are not displayed in the PFM - Asset request header type (for definitions of these fields, see *Net Present Value (NPV)* on page 75, *Chapter 5, Configuring a Custom Financial Metric*, on page 45, and *Configuring a Custom Financial Metric* on page 46).

Table 3-3. Selected default asset fields (page 1 of 2)

Field Name (*Required)	Description
Summary section	
Business Unit	The business unit in charge of the portfolio that includes this asset.
Details section, Asset Details subsection	
*Asset Name	The name of the asset.
Asset Health	The status of the asset.

Table 3-3. Selected default asset fields (page 2 of 2)

Field Name (*Required)	Description
Project Class	The class of project to which this asset belongs (for example, Innovation).
Asset Class	The class of asset to which this asset belongs (for example, Infrastructure).
Business Objective	The business objective with which the asset is aligned.
Project	The project in HP Project Management that is associated with the asset.
Details section, Business Case Details subsection	
Budget	The budget for the asset.
Financial Benefit	The monetary benefit the asset provides.
Staffing Profile	The resource demand of the asset.
Return on Investment	(Read only) The ROI for the asset. (For a definition, see Return on Investment (ROI) on page 75.)
Value Rating	(Read only) The total qualitative Value calculated for the asset. See Chapter 6, Adjusting the Scoring Key, on page 49.
Risk Rating	(Read only) The total qualitative Risk calculated for the asset. See Chapter 6, Adjusting the Scoring Key, on page 49.
Score Adjustment	The amount to adjust the calculated Value Rating – Risk Rating to obtain the Total Score . For more information, see Scoring Key Formulas (Rules) on page 53.
Total Score	(Read only) The total score (Value Rating – Risk Rating + Score Adjustment) calculated for the project.

You can adjust certain properties of these fields in the usual way using the Request Types window, but other properties (such as their tokens) are essential to the functioning of HP Portfolio Management and cannot be revised.



You can modify the rest of the fields in this entity to suit your business needs. See [Customization Considerations](#) and [Creating Your Own HP Portfolio Management Entities](#) for more information on customizing HP Portfolio Management entities.

Customization Considerations

If you want to add other information to the asset, HP recommends that you create a new section in the PFM - Asset request type and add the new fields there.

For general recommendations on changing HP Portfolio Management entities, see *General Customization Considerations*.

For more detailed information on creating and modifying request type fields, see the *HP Demand Management Configuration Guide*.

Creating Your Own HP Portfolio Management Entities

Although HP Portfolio Management contains preconfigured proposals, projects, and assets, and life cycle processes that drive their resolution, you might want to create your own proposals, projects, or assets to use in HP Portfolio Management.

General Customization Considerations

Consider the following when making changes to any entities:

- Any changes made to one entity's fields (such as the PFM - Proposal request type) should be made to the others (PFM - Project and PFM - Asset request types).
- You might choose to remove or add request statuses. If so, the changes must be made in the request type and in the workflow. HP recommends that you keep things simple, keep high-level statuses in mind, and not have a unique status for every workflow step.
- Request type rules are used for the automatic calculation of qualitative scores, but not to default any other information. If used for such other purposes, they should be used sparingly to limit the complexity and effort of configuration. Default rules for qualitative scoring calculation should not be modified except as described in *Adjusting the Scoring Key* on page 49.

Copying and Revising HP Portfolio Management Entities

HP Portfolio Management delivers preconfigured proposal, project, and asset entities that come ready to use. You can copy these entities using the Request Type Workbench. You can then customize the copies, keeping in mind the limitations on changing certain fields as described (for proposals) in *Customization Considerations on page 20*.

For more detailed information on copying request types and modifying request type fields, see the *HP Demand Management Configuration Guide*.

The general process for creating your own HP Portfolio Management entities using this method is as follows:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
4. In the Request Type Workbench, copy the desired entity.
5. Make the desired modifications to the copy.
6. In the copy's **Workflows** tab, make sure the appropriate HP Portfolio Management workflow is enabled for use with the request type.
7. Open the associated HP Portfolio Management workflow using **Configuration > Workflows** in the PPM Workbench.
8. On the **Request Types** tab, make sure the copied request type is enabled for use in the workflow.
9. If you are customizing a copy of a project, use the menu bar in the standard interface to create a project type:
Administration > Project Types & Templates > Create a Project Type

In the **Request Types** policy, specify the **Portfolio Management Request Type** to use for this project type.

See the *HP Project Management Configuration Guide* for more information about configuring the project.

When these steps are completed, HP Portfolio Management should function with your new request type.

Using HP Portfolio Management Field Groups

Your company might have developed its own processes for portfolio-related business matters, and these processes might have been implemented as workflows with associated request types in PPM Center. You can modify these request types for use with HP Portfolio Management by adding field groups. HP Portfolio Management (PFM) field groups are listed in [Table 3-4](#).

Table 3-4. HP Portfolio Management request type field groups

PFM Request Type	Field Group
PFM - Proposal	PFM Proposal
PFM - Project	PFM Project
PFM - Asset	PFM Asset

Multiple request types can be used with a single HP Portfolio Management workflow. Multiple workflows can also be used with a single request type.

The general process for modifying an existing request type for use in HP Portfolio Management is as follows:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
4. In the Request Type Workbench, open the existing request type that you want to modify for use with HP Portfolio Management.
5. When the request type has been opened, examine the associated request header type.

Field groups are associated with request types through the request header type.



If this request header type is also associated with other request types, this procedure will enable all of those request types for use in HP Portfolio Management as well.

6. Determine the type of HP Portfolio Management entity (proposal, project, or asset) that the existing request type will be used as.
7. Link the appropriate HP Portfolio Management field group to the request header type used by the existing request type.

See *Adding HP Portfolio Management Field Groups to a Request Type* for more detailed information.

8. In the existing request type's **Workflows** tab, make sure the HP Portfolio Management workflow associated with the entity you selected in [step 6](#) is enabled for use with the existing request type.
9. Open the HP Portfolio Management workflow associated with the entity you selected in [step 6](#) and, in its **Request Types** tab, make sure the existing request type is enabled for use with the workflow.

When these steps are completed, HP Portfolio Management should function with your request type in place of or alongside the preconfigured HP Portfolio Management request type.



The **Resources** tab on the PFM - Asset request type includes a checkbox to allow only resources in the staffing profile to log time on time sheets. This checkbox is enabled only if the **Use Time Management to track actuals** checkbox is selected.



When field groups are associated with existing request types (through the request header type definition), tables in the PPM Center database are updated to handle this new configuration. Because of the scope of database changes, you should rerun the database statistics on your PPM Center database. Instructions for this are included in the *System Administration Guide and Reference*. Contact your system administrator for help with this procedure.

Adding HP Portfolio Management Field Groups to a Request Type

In order to function in HP Portfolio Management, existing request types must have an associated HP Portfolio Management field group.

To associate an HP Portfolio Management field group with an existing request type:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
4. In the Request Type Workbench, select or create a request type.
5. Open the request type.
6. In the Request Type window, under the **Request Header Type** field, click **Open**.

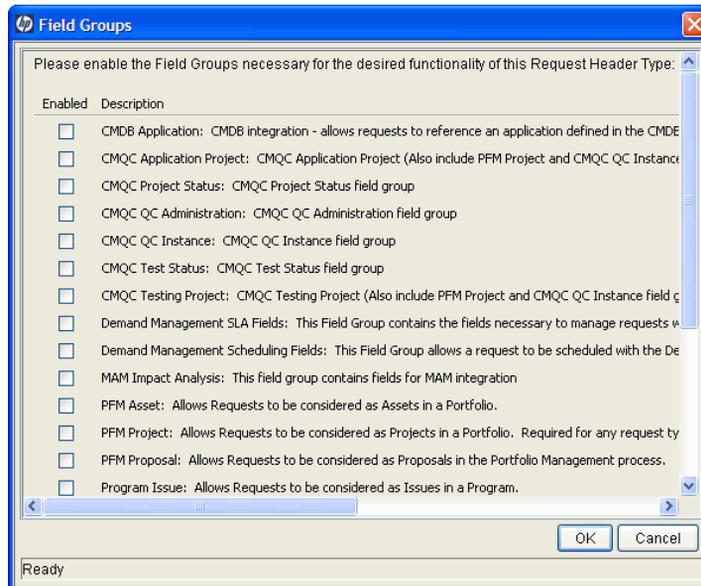
The specified Request Header Type window opens.

Prompt	Disp...	Display Only	Transaction Hist.	Notes Hist.	On Search/Filter Pages
Summary					
Request No.:	Y	Y	N	N	N
Request Type:	Y	N	N	N	Y
Created By:	Y	Y	N	N	Y
Department:	Y	N	N	N	Y
Sub-Type:	Y	N	N	N	Y
Created On:	Y	Y	N	N	Y
Workflow:	Y	N	N	N	Y
Request Status:	Y	Y	N	N	Y

7. Click **Field Groups**.

The Field Groups window opens.

8. Scroll down or expand the window as needed to see the field groups related to PFM.



9. Select one of the following HP Portfolio Management field groups to attach to your request header type:

- **PFM Asset**
- **PFM Project**
- **PFM Proposal**



Add only one HP Portfolio Management field group to the request header type. If you add multiple field groups, you cannot save the request header type and you will have to cancel out of the Request Header Type window, losing any modifications made up to that point.

10. Click **OK**.

The selected field group appears on the request header type.

11. Save the request header type and the request type.



When field groups are associated with existing request types (through the request header type definition), tables in the PPM Center database are updated to handle this new configuration. Because of the scope of database changes, you should rerun the database statistics on your PPM Center database. Instructions for this are included in the *System Administration Guide and Reference*. Contact your system administrator for help with this procedure.

4 Customizing HP Portfolio Management Processes

Overview of Customizing HP Portfolio Management Processes

This chapter discusses the preconfigured resolution processes delivered with HP Portfolio Management and provides technical considerations for customizing them. These processes are integrated with the preconfigured entities (proposals, projects, and assets) also supplied with HP Portfolio Management. Although these processes can be considered “best practice” and are ready to use, you can also modify or copy them to suit your business needs.

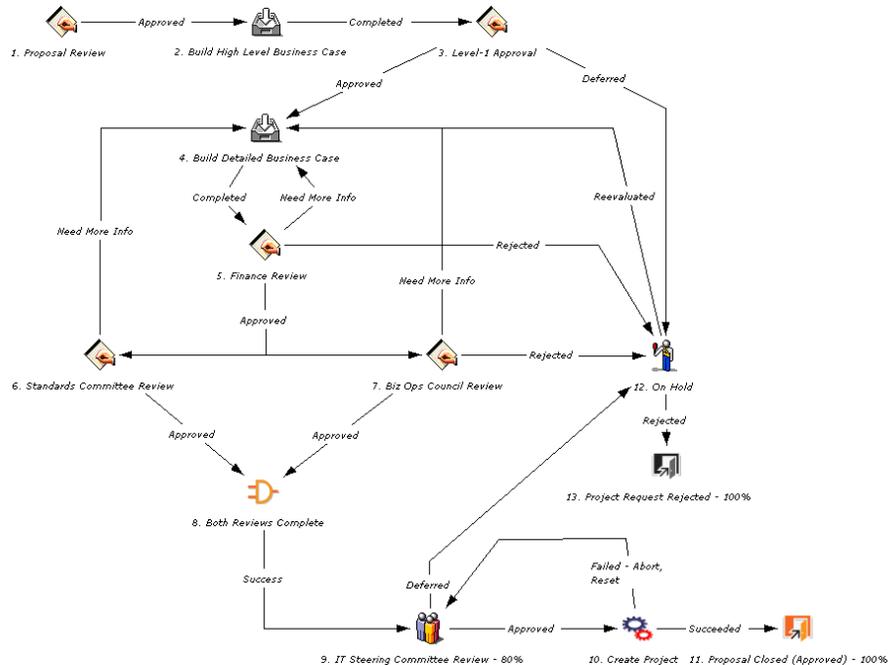
HP Portfolio Management Processes

HP Portfolio Management features preconfigured resolution processes designed to integrate with the entities, as described in *HP Portfolio Management Entities* on page 17. You can view and configure these processes using the Workflow Workbench.

PFM - Proposal Workflow

The PFM - Proposal workflow defines the life cycle of a proposal as its business case is built out and the proposal is rated and evaluated. *Figure 4-1* shows the workflow.

Figure 4-1. PFM - Proposal workflow



The default workflow steps are described as follows:

- 1. Proposal Review.** This is a quick review of the initial request to determine if it even warrants going through the proposal process.
- 2. Build High-Level Business Case.** The high-level business case for the proposal is built here in preparation for the next step.
- 3. Level-1 Approval.** The high-level business case is reviewed before effort is spent building the proposal's detailed business case.

4. Build Detailed Business Case. Here the designated owner of the proposal (usually an assigned business analyst) enters details for the project, including the high level project budget, the resource requirements (staffing profile) and an estimated financial benefit.

5. Finance Review. After the business case has been built, either the formal finance group or the finance part of IT reviews the business case for overall validity and a sanity check in terms of ROI.

6. Standards Committee Review and 7. Biz Ops Council Review. Once it passes the finance review, the proposal goes for a business review and a technical review by the appropriate committees. Both of these committees review the proposal and complete appropriate value and risk criteria.

9. IT Steering Committee Review. After passing business and technical reviews, the proposal goes to the IT Steering Committee. This committee looks at the proposal in the context of work already being performed and other proposals under consideration. They also look at relative ratings and rankings. They might also use the HP Portfolio Management scenario comparison functionality, including portfolio optimization, to do what-if analyses of different portfolio mixes.

10. Create Project. If the proposal is approved by the steering committee, a project is automatically created, meaning that the project has been approved and is ready for planning and execution. The project begins moving along the project workflow as the proposal is closed.

Customization Considerations

Consider the following when making changes to the PFM - Proposal workflow:

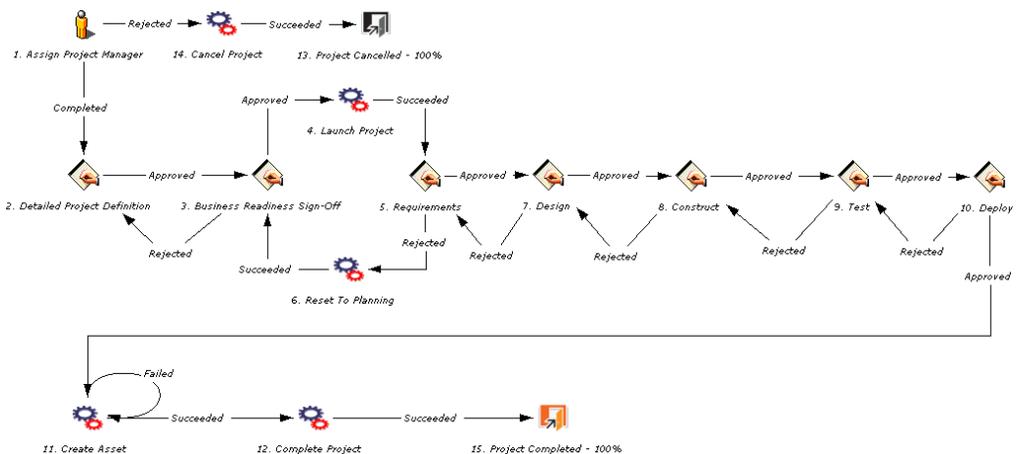
- The default process has many different committee reviews and approvals. These can be removed if your company's review and approval process is simpler or more consolidated. Note that the request status changes in the default steps, and ensure that the reconfigured process goes through the desired request statuses. See [Request Statuses and Workflow Steps on page 41](#) for more detailed discussion of request statuses and workflows.

- You can also add steps, change step names, and modify notifications, although HP recommends that the proposal process be tracked at a high level, such as under fifteen steps. The Create Project step and the Proposal Closed (Approved) - 100% step should be retained in the final workflow to take full advantage of HP Portfolio Management functionality. See *Automatically Creating a Project from a Proposal* on page 43 for more details.
- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. For more information on populating security groups, see *Associating Security Groups with Process Steps* on page 67.

PFM - Project Workflow

The PFM - Project workflow presents the very high level stages of a project being implemented. Steps are updated manually, either by the project manager to signal the completion of a stage, or by approvers who verify that the stage is complete. *Figure 4-2* shows the workflow.

Figure 4-2. PFM - Project workflow



The default workflow steps are described as follows:

1. Assign Project Manager. At this step, a project manager should be assigned to the project to manage and coordinate the remaining tasks and deliverables.

- 2. Detailed Project Definition.** During this step, the project manager works with the appropriate team members and stakeholders to build the detailed definition of the project. This might include revisions to the staffing profile, budget, and financial benefit entries for the project. A detailed work plan should be created at this step as well.
- 3. Business Readiness Sign-Off.** At this step, the appropriate stakeholders and IT management are required to sign off on the detailed project definition created in the previous step.
- 4. Launch Project.** If approved, the project is made active at this step.
- 5. Requirements.** At this step, members of the project team define what must be designed and built.
- 6. Reset to Planning.** If the project requirements were rejected, at this step the project and its associated staffing profile, budget, and financial benefit are reset to In Planning status.
- 7. Design.** Once the project is approved, members of the project team design the final output. This step is complete when the project team is ready to begin implementing the end solution of the project.
- 8. Construct.** This step indicates that the project is in implementation phase. This step is complete when the solution is ready for testing.
- 9. Test.** This is the final system and integration testing phase. Rework is done here unless major changes must be made, in which case the process returns to implementation. Otherwise, when testing is done, the step is marked as completed (or approved).
- 10. Deploy.** During this step, the project outputs are released to production.
- 11. Create Asset.** Following deployment of the project, an asset is automatically generated and begins moving along the asset workflow as the project is closed. The asset is responsible for tracking ongoing maintenance and other activities against the end result of the project.
- 12. Complete Project.** This step marks the project and its associated staffing profile, budget, and financial benefit as Complete.

Customization Considerations

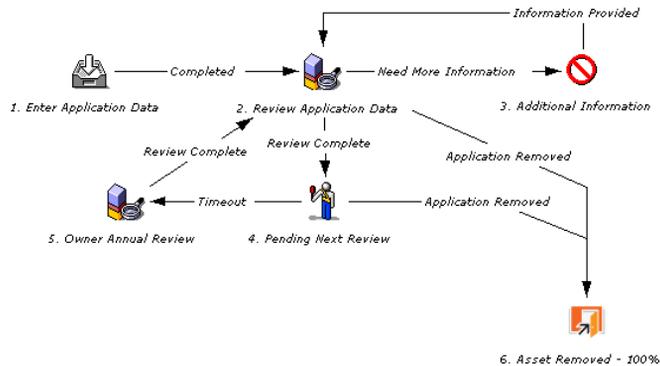
Consider the following when making changes to the PFM - Project workflow:

- You might want to significantly change the PFM - Project workflow to represent the major project phases at your company. You must make sure the request statuses are updated to be consistent with any project workflow changes. See *Request Statuses and Workflow Steps* on page 41 for more detailed discussion of request statuses and workflows.
- You can also add steps, change step names, and modify notifications, although HP recommends that the project stages be tracked at a high level, such as under fifteen steps; they are not meant to emulate a detailed work plan. The Create Asset step should be retained in the final workflow to take full advantage of HP Portfolio Management functionality. See *Automatically Creating a Project from a Proposal* on page 43 for more details.
- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. For more information on populating security groups, see *Associating Security Groups with Process Steps* on page 67.

PFM - Asset Workflow

The PFM - Asset workflow represents the annual entry and review cycle of an application asset. It is meant to cycle through the various steps periodically until the application reaches the end of its life and is removed from production. Assets should be tracked at an aggregate level rather than for every single application (for example, ERP should be a single asset rather than tracking operations work at each individual module). You should have perhaps dozens of assets, but not hundreds. *Figure 4-3* shows the workflow.

Figure 4-3. PFM - Asset workflow



The default workflow steps are described as follows:

- 1. Enter Application Data.** Initial asset information is entered, including budget, resource, and benefit information.
- 2. Review Application Data.** The asset information is validated, resulting in a request for more information or sign off (Review Complete).
- 3. Additional Information.** In this step, any additional information that is required for the asset is gathered.
- 4. Pending Next Review.** An asset at this step has passed its last review and is simply waiting until the next review. It automatically moves to the next step at the configured time interval.
- 5. Owner Annual Review.** This review encourages the owner of an asset to think about whether the asset continues to require maintenance. Even though the business unit might not be changing anything or running any projects against it, it should be evaluated on at least an annual basis, and perhaps updated in regard to financial benefit, budget, or staffing profile.

Customization Considerations

Consider the following when making changes to the PFM - Asset workflow:

- This process is very basic and might not require much change, but you might want to change time intervals between reviews.
- You can also add steps, change step names, and modify notifications, although you must make sure the request statuses are updated to be consistent with any asset workflow changes. See *Request Statuses and Workflow Steps* for more detailed discussion of request statuses and workflows.
- Each step in the workflow is associated with a security group or groups. Users who are not part of the security group for a workflow step cannot act on it. For more information on populating security groups, see *Associating Security Groups with Process Steps* on page 67.

Process Customization Considerations

You can customize the process delivered with HP Portfolio Management to suit any business procedure, using the Workflow Workbench. Before making any customizations, review the following sections:

- *Request Statuses and Workflow Steps*
- *Automatically Creating a Project from a Proposal* on page 43
- *Automatically Creating an Asset from a Project* on page 44

Request Statuses and Workflow Steps

The preconfigured processes delivered with HP Portfolio Management integrate with the proposal, project, and asset entities that are provided. No special configuration is required to make them work together.

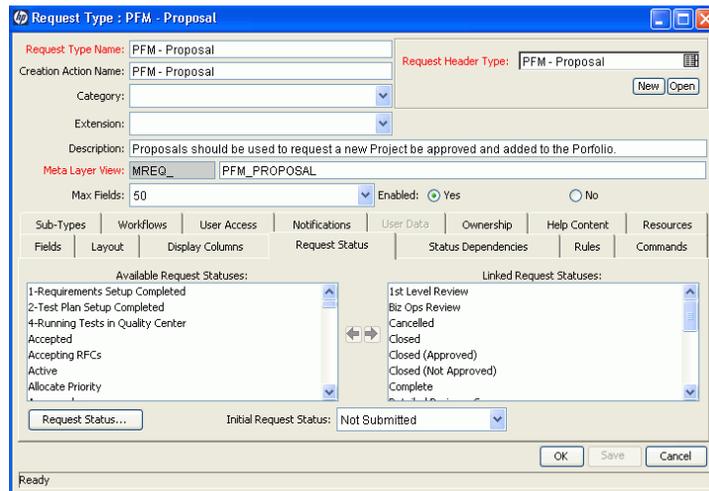
Each entity's request type contains statuses that are linked to steps in their associated workflows.

For example, the PFM - Proposal request type contains statuses such as Biz Ops Review, Detailed Business Case, Finance Review, and Standards Review, which correspond to individual steps in the PFM - Proposal workflow.

You can create your own proposals, projects, or assets for use in HP Portfolio Management, using the Request Type Workbench. For more detailed information on creating your own HP Portfolio Management entities, see [Creating Your Own HP Portfolio Management Entities on page 26](#).

If you are going to use a custom request type for a particular workflow, make sure the request type contains the statuses necessary for each workflow step. This is controlled from the **Request Status** tab in the Request Type Workbench. [Figure 4-4](#) shows the **Request Status** tab.

Figure 4-4. Request Type window - Request Status tab



Alternatively, you could make the workflow steps link to the statuses already in the target request type. This is controlled from the **Properties** tab of the Workflow Step window in the Workflow Workbench. *Figure 4-5* shows the **Properties** tab with the **Request Status** field associated with PFM - Proposal workflow step 7, Biz Ops Council Review (see *Figure 4-1* on page 34).

Figure 4-5. Workflow Step window - Properties tab

Notifications	Timeout	User Data	Results
Properties	Security	Segregation of Duties	
Step Number: 7			
Step Name: Biz Ops Council Review			
Action Summary:			
Description:			
Source Type: Decision			
Source Name: PFM - Review Step			
Enabled: <input checked="" type="radio"/> Yes <input type="radio"/> No			
Display: Always			
Workflow Parameter: NONE			
Avg Lead Time:			
Request Status: Biz Ops Review			
Current % Complete:			
Parent Assigned To User:			
Parent Assigned To Group:			
Workflow Step Information:			
Authentication Required: None			
OK Apply Cancel			
Ready			

For more information on workflow steps and request statuses, see the *HP Demand Management Configuration Guide*.

Automatically Creating a Project from a Proposal

In the preconfigured PFM - Proposal workflow (see *PFM - Proposal Workflow on page 34*), the Create Project step creates a project. The execution step for creating a project from a proposal uses an **Execution Type** of **Workflow Step Commands** and the special command `ksc_create_project`.

If the proposal specifies a work plan template, this special command automatically creates a work plan for the new project based on that template.

The budget, financial benefit, and staffing profile attached to the existing proposal are copied automatically and attached to the new project.

Removing the `ksc_create_project` special command from the PFM - Proposal workflow does not have an adverse effect on HP Portfolio Management itself, but it does prevent users from taking advantage of the automated functionality this special command provides.

If you reinstate the `ksc_create_project` special command in the PFM - Proposal workflow, no additional configuration is required for it to work correctly with HP Portfolio Management.

If you are creating a new workflow from scratch for use with HP Portfolio Management and you want to incorporate a `ksc_create_project` special command that will create a new project, no additional configuration is necessary beyond specifying the correct request types to choose from. When in use, the `ksc_create_project` special command automatically copies the appropriate budget, financial benefit, and staffing profile and carries over the appropriate field data.

Automatically Creating an Asset from a Project

In the preconfigured PFM - Project workflow (see *PFM - Project Workflow on page 36*), the Create Asset step creates an asset. The execution step for creating an asset from a project uses an **Execution Type** of **Built-In Workflow Event** and a **Workflow Event** of **create_request**.

The financial benefit attached to the existing project is copied automatically and attached to the new asset.

If multiple request types have been configured for use in HP Portfolio Management as assets, make sure they are listed as choices in the **create_request** step.

For example, if your company has configured two additional request types to be used as asset requests, enable these request types in the PFM - Project workflow's Create Asset step.

Removing the **create_request** step from the PFM - Project workflow does not have an adverse effect on HP Portfolio Management itself, but it does prevent users from taking advantage of the automated functionality this step provides.

If you reinstate the **create_request** step in the PFM - Project workflow, no additional configuration is required for it to work correctly with HP Portfolio Management.

If you are creating a new workflow from scratch for use with HP Portfolio Management and you want to incorporate a **create_request** step that will create a new asset, no additional configuration is necessary beyond specifying the correct request types to choose from. When in use, the **create_request** step automatically copies the appropriate financial benefit and carries over the appropriate field data.

5 Configuring a Custom Financial Metric

Overview of Configuring a Custom Financial Metric

This chapter discusses how to configure the **Custom Field Value** for use in HP Portfolio Management.

HP Portfolio Management provides preconfigured fields that show the following industry-standard measurements of project success:

- Return on Investment (ROI). For a definition, see *Return on Investment (ROI)* on page 75.
- Net Present Value (NPV). For a definition, see *Net Present Value (NPV)* on page 75.

HP Portfolio Management also provides a blank **Custom Field Value** that can be used to measure proposal, project, and asset performance instead of or in addition to ROI and NPV. It also appears in HP Portfolio Management visualizations.

Configuring a Custom Financial Metric



HP recommends that the **Custom Field Value** be a numeric text field. Fields of other types might not appear in HP Portfolio Management visualizations.

To enable the **Custom Field Value** for use in HP Portfolio Management:

1. Activate the **Custom Field Value** using the Configure Portfolio Management page:
 - a. Log on to PPM Center.
 - b. From the menu bar, select **Administration > Portfolio Management > Configure Portfolio Management**.

The Configure Portfolio Management page opens.

The screenshot shows the 'Configure Portfolio Management' dialog box. It is divided into two sections: 'Tracking Preferences' and 'Categorization Preferences'. Under 'Tracking Preferences', there are three checkboxes: 'Return On Investment' (checked), 'Net Present Value' (unchecked), and 'Custom Field Value' (unchecked). Under 'Categorization Preferences', there are two checkboxes: 'Project Class' (checked) and 'Asset Class' (checked). At the bottom right, there are 'Done' and 'Cancel' buttons.

- c. Select the **Custom Field Value** checkbox.
 - d. Click **Done**.
2. Enable the **Custom Field Value** for display:
 - a. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
 - b. From the shortcut bar, select **Demand Mgmt > Request Types**.
 - c. Click **List**.

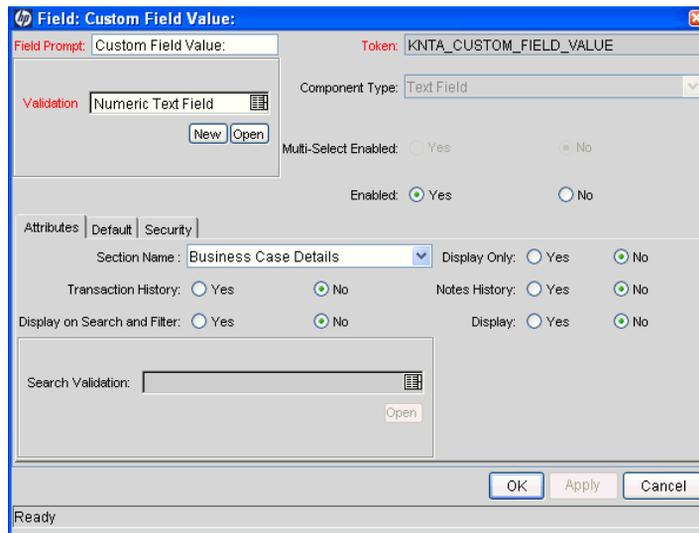
The **Results** tab lists the available request types.

- d. Open the HP Portfolio Management request type (**PFM - Asset**, **PFM - Project**, or **PFM - Proposal**) that will use the **Custom Field Value**.
- e. Click **Open** under the **Request Header Type** field.

The specified Request Header Type window opens.

- f. In the **Fields** tab, under **Business Case Details**, select the **Custom Field Value** field and click **Edit**.

The Field window opens.



- g. In the **Attributes** tab, set the **Display** field to **Yes**.
 - h. In the top section of the window, change the **Field Prompt** to the desired field name.
 - i. Click **OK**.
3. Configure a request type rule that will populate a value into the **Custom Field Value** field:
- a. Open the HP Portfolio Management (PFM) request type that will use the **Custom Field Value**.
 - b. Click the **Rules** tab.

- c. Click **New** to define a request type rule for the **Custom Field Value** field.

See *Example Custom Financial Metrics* for examples of metrics used to govern the calculation of the **Custom Field Value**.

For more detailed information on creating request type rules, see the *HP Demand Management Configuration Guide*.

- d. Save the request type.

4. Repeat [step 3 on page 47](#) for any other HP Portfolio Management request types that will use the **Custom Field Value**.

The **Custom Field Value** is ready to use and appears in the appropriate HP Portfolio Management visualizations and analyses.

Example Custom Financial Metrics

Some examples of **Custom Field Value** metrics that can be used with or instead of ROI and NPV include:

- **Payback Period.** This metric calculates how long it takes for a proposal, project, or asset to start having positive cost/benefit values, based on its benefits and budget.
- **Productivity Index.** This metric is a financial ranking approach that takes into account expected commercial value, technical risk, and research and development expenditures.
- **Expected Commercial Value.** This metric leverages probabilities and resource constraints to arrive at its answer.

Depending on the business unit deploying them, these example metrics might employ one of several different formulas in their calculation. Consult the appropriate business lead or team for the metric and formula you want to implement.



Additionally, configuring a custom metric might require knowledge of SQL or the creation of additional custom fields for each entity so that the metric value can be calculated effectively.

6 Adjusting the Scoring Key

Overview of Adjusting the Scoring Key

This chapter discusses the structure of the HP Portfolio Management qualitative scoring key and provides instructions for modifying it.

Proposals, projects, and assets can be evaluated and ranked according to qualitative criteria that are not tracked by purely numeric values of cost, resource requirement, and benefit. These qualitative rankings are tracked using other fields provided with the HP Portfolio Management entities. Each field is associated with a weighted value, and the total of all the weighted values yields a qualitative score for the given proposal, project, or asset.

The underlying scoring mechanism is set up using the scoring key and validations. A user with the correct level of access can modify these rankings or add custom criteria based on specific requirements, by revising the scoring key and using the correct validation for a field.

Scoring Key Structure

Scoring criteria can include such considerations as how much technical risk exists, what the strategic match for a given project is, and how much competitive advantage would be gained. *Figure 6-1* shows the View Scoring Criteria window with the default scoring key, which includes scoring criteria such as **Technical Risk** in the **Risk Domain** and **Internal Rate of Return** in the **Value Domain**.

To access the View Scoring Criteria window:

1. Log on to PPM Center.
2. From the menu bar, select
Administration > Portfolio Management > View Scoring Criteria.

Users select text-based descriptions for an entity's criteria, typically at specific points in the life cycle of the proposal, project, or asset. Each selection for each criterion is associated with a weighted value, which is used to automatically calculate the **Total Score** for the given proposal, project, or asset. For more information, see *Scoring Key Formulas (Rules)* on page 53.



For each **Criterion**, users see only the text-based **Selections** (as drop-down lists). They do not see or control any numeric **Weight** associated with a **Criterion** or any **Value** associated with a **Selection**.

Figure 6-1. Qualitative scoring key

View Scoring Criteria

Done

Scoring Key			
Risk Domain			
Weight	Criterion	Value	Selection
3	Technical Risk	0	No uncertainty.
		1	Very low uncertainty.
		2	Low uncertainty.
		3	Medium uncertainty.
		4	High uncertainty.
		5	Unknown.
2	Architecture Risk	0	Utilizes standard architecture.
		1	Minor change to standard architecture.
		2	Medium change to standard architecture.
		3	Major change to standard architecture.
		5	No leverage of standard architecture.
2	Definition Risk	0	Requirements are firm. No changes.
		1	Requirements are moderately firm. Low probability of changes.
		2	Requirements are moderately firm. Medium probability of changes.
		3	Requirements are moderately firm. High probability of changes.
		4	Requirements are not firm.
1	Infrastructure Risk	0	Uses existing systems and services.
		1	Small changes to existing infrastructure.
		2	Small changes and additions are expected.
		3	Moderate changes are expected.
		4	Moderate changes to multiple systems are expected.
1	Organization Risk	0	No risk.
		1	Low risk.
		2	Medium low risk.
		3	Medium risk.
		4	High risk.
5	Productivity	0	Decreased productivity.
		1	Less than 10% increase.
		2	11 - 30% increase.
		3	30 - 50% increase.
		5	51% or more increase.

Value Domain			
Weight	Criterion	Value	Selection
10	Internal Rate of Return	0	Zero or less.
		1	1 - 5.99%.
		2	6 - 9.99%.
		3	10 - 14.99%.
		4	15% and above.
5	Competitive Advantage	0	No client or market impact.
		1	Improves operating efficiencies that affect competitive position.
		2	Improves operating efficiencies in strategic area.
		3	Provides some degree of outside access.
		4	Provides moderate degree of outside access.
5	Strategic Match	0	No impacted business goals.
		1	No impacted goal. Increases operational efficiency.
		2	No direct impact of goal, but prerequisite.
		3	Direct impact on a portion of a goal.
		4	Direct achievement of a goal.
2	Competitive Response	0	Can be postponed for 12 months with no effect on competitive positioning.
		1	Can be postponed for 12 months with minimal effect to competitive positioning.
		2	Can be postponed for 12 months with significant effect to competitive positioning.
		3	Postponement will result in loss of competitive positioning.
		5	Postponement will result in complete loss of competitive positioning.

Done

Scoring Key Validations

For each criterion in the scoring key, there is a validation named PFM Score - <Criterion Name> (for example, PFM Score - Architecture Risk).

To add a new criterion, you must create a new validation, but you specify its values, selections, and weights in the scoring key itself. For more information, see [Adding a New Criterion on page 58](#).

▶ The PFM Score - <Criterion Name> validation can be a drop-down list or a single-select auto-complete list, and it must be validated by SQL.

For details on the relationship between request type fields and validations, see the *HP Demand Management Configuration Guide*.

Scoring key validations, including sample values, are provided with HP Portfolio Management. You can revise each validation to suit your company's needs. [Figure 6-2](#) shows a criterion's values as accessed from the editable version of the scoring key. Procedures are described in [Adjusting the Scoring Key on page 54](#).

Figure 6-2. Scoring key criterion ready for modification

HP Close Window X

Edit Criterion: Architecture Risk

Weight:

Domain: Risk Domain

Modify Selection Information

Value	Selection
<input checked="" type="checkbox"/> <input type="text" value="0"/>	<input type="text" value="Utilizes standard architecture."/>
<input checked="" type="checkbox"/> <input type="text" value="1"/>	<input type="text" value="Minor change to standard architecture."/>
<input checked="" type="checkbox"/> <input type="text" value="2"/>	<input type="text" value="Medium change to standard architecture."/>
<input checked="" type="checkbox"/> <input type="text" value="3"/>	<input type="text" value="Major change to standard architecture."/>
<input checked="" type="checkbox"/> <input type="text" value="5"/>	<input type="text" value="No leverage of standard architecture."/>

Add New Selection:

Value	Selection	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

Close Window X

▶ Depending on the level of revision involved, the request type rule that governs the calculation of the **Total Score** might need to be revised.

Scoring Key Formulas (Rules)

The weights and values associated with criteria are used to calculate the total qualitative score for an entity. Criteria are in either of two domains:

- **Risk Domain.** Criteria used to measure an entity's potential risk.

All HP Portfolio Management entities have a read-only field called **Risk Rating**. Its value is calculated automatically using the formula:

$$\text{Risk Rating} = \text{Sum (Weight * Value for each Risk Domain criterion)}$$

where **Value** is the number associated with the user's choice of **Selection** from a drop-down list.

- **Value Domain.** Criteria used to measure an entity's potential value.

All HP Portfolio Management entities have a read-only field called **Value Rating**. Its value is calculated automatically using the formula:

$$\text{Value Rating} = \text{Sum (Weight * Value for each Value Domain criterion)}$$

where **Value** is the number associated with the user's choice of **Selection** from a drop-down list.



The visualization seen when you analyze your current portfolio can be filtered by **Risk Rating** or **Value Rating**. See the *HP Portfolio Management User's Guide* for more detailed information.

The total qualitative score for an entity is calculated as:

$$\text{Total Score} = \text{Value Rating} - \text{Risk Rating} + \text{Score Adjustment}$$

where **Score Adjustment** is a field provided with each entity to allow automatic adjustment of the qualitative score. For example, an optimistic project sponsor might enter 10 in the **Score Adjustment** field, raising the **Total Score** by 10 points. Someone who thinks the project is somewhat riskier than the calculations indicate might enter -5, lowering the **Total Score** by 5 points.

For information about changing or adding criteria for the scoring key, see [Adjusting the Scoring Key](#).

Adjusting the Scoring Key

You can adjust the scoring key directly in the Configure Scoring Criteria page. To add a new criterion, you first create a new validation in the PPM Workbench and then modify its values using the Configure Scoring Criteria page.

The formulas that calculate the **Value Rating**, **Risk Rating**, and **Total Score** are provided with the entities in the form of request type rules.

- When making changes to the existing criteria provided with HP Portfolio Management, no changes to the rules are necessary.
- If a criterion name is changed *and* the associated field's token is changed, the SQL for the appropriate rules must be modified to include the new token for the changed criterion's field.
- If a new criterion is created, the SQL for the appropriate rules must be modified to include the token for the new criterion's field.

Changing Criterion Properties

You can revise the following properties of criteria in the scoring key by changing them in the Configure Scoring Criteria page:

- Weight
- Domain
- Value
- Selection

You can also add new values and selections.

To change the properties of a criterion in the scoring key:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portfolio Management > Configure Scoring Criteria**.

The Configure Scoring Criteria page opens.

Configure Scoring Criteria

Save Cancel

Scoring Key			
New Criteria			
Weight	Criterion	Value	Selection
	PR Impact List		Please define domain, weight, and selections for this criterion.
	Edit		
Risk Domain			
Weight	Criterion	Value	Selection
3	Technical Risk	0	No uncertainty.
		1	Very low uncertainty.
		2	Low uncertainty.
		3	Medium uncertainty.
		4	High uncertainty.
		5	Unknown.
	Edit		
2	Architecture Risk	0	Utilizes standard architecture.
		1	Minor change to standard architecture.
		2	Medium change to standard architecture.
		3	Major change to standard architecture.
		5	No leverage of standard architecture.
	Edit		
2	Definition Risk	0	Requirements are firm. No changes.
		1	Requirements are moderately firm. Low probability of changes.
		2	Requirements are moderately firm. Medium probability of changes.
		3	Requirements are moderately firm. High probability of changes.
		4	Requirements are not firm.
	Edit		
1	Infrastructure Risk	0	Uses existing systems and services.
		1	Small changes to existing infrastructure.
		2	Small changes and additions are expected.
		3	Moderate changes are expected.
		4	Moderate changes to multiple systems are expected.
		5	Substantial changes to infrastructure are expected.
	Edit		
1	Organization Risk	0	No risk.
		1	Low risk.
		2	Medium low risk.
		3	Medium risk.
		4	High risk.
		5	Extreme risk.
	Edit		
Value Domain			
Weight	Criterion	Value	Selection
10	Internal Rate of Return	0	Zero or less.
		1	1 - 5.99%.
		2	6 - 9.99%.
		3	10 - 14.99%.
		4	15% and above.
	Edit		
5	Competitive Advantage	0	No client or market impact.
		1	Improves operating efficiencies that affect competitive position.
		2	Improves operating efficiencies in strategic area.
		3	Provides some degree of outside access.
		4	Provides moderate degree of outside access.
		5	Provides high level of outside access.
	Edit		
5	Strategic Match	0	No impacted business goals.
		1	No impacted goal. Increases operational efficiency.
		2	No direct impact of goal, but prerequisite.
		3	Direct impact on a portion of a goal.
		4	Direct achievement of a goal.
		5	Direct achievement of multiple goals.
	Edit		
2	Competitive Response	0	Can be postponed for 12 months with no effect on competitive positioning.
		1	Can be postponed for 12 months with minimal effect to competitive positioning.
		2	Can be postponed for 12 months with significant effect to competitive positioning.
		3	Postponement will result in loss of competitive positioning.
		5	Postponement will result in complete loss of competitive positioning.
	Edit		
2	Productivity	0	Decreased productivity.
		1	Less than 10% increase.
		2	11 - 30% increase.
		3	30 - 50% increase.
		5	51% or more increase.
	Edit		

Save Cancel

3. Locate the criterion whose value you want to change and click the **Edit** button below its name.

The Edit Criterion page opens.

Suppose, for example, that you want to edit the Architecture Risk criterion.

hp Close Window x

Edit Criterion: Architecture Risk

Weight:

Domain: Risk Domain

Modify Selection Information

	Value	Selection
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="Utilizes standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="Minor change to standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="Medium change to standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="text" value="Major change to standard architecture."/>
<input checked="" type="checkbox"/>	<input type="text" value="5"/>	<input type="text" value="No leverage of standard architecture."/>

Add New Selection:

Value	Selection
<input type="text"/>	<input type="text"/>

Done Cancel

Close Window x

4. Make the desired changes to the criterion.

Suppose in this example that you want to add a value of 6 that represents “Negative impact to standard architecture.” Specify these values in the **Value** and **Selection** fields under the **Add New Selection** heading, and click **Add**.

The new **Value** and **Selection** are added to the list.

hp Close Window X

Edit Criterion: Architecture Risk

Weight:

Domain: Risk Domain

Modify Selection Information	
Value	Selection
<input checked="" type="checkbox"/> 0	Utilizes standard architecture.
<input checked="" type="checkbox"/> 1	Minor change to standard architecture.
<input checked="" type="checkbox"/> 2	Medium change to standard architecture.
<input checked="" type="checkbox"/> 3	Major change to standard architecture.
<input checked="" type="checkbox"/> 5	No leverage of standard architecture.
<input checked="" type="checkbox"/> 6	Negative impact to standard architecture.

Add New Selection:

Value	Selection
<input type="text"/>	<input type="text"/>

5. Click **Done**.
6. Click **Save** to save the changes made to the scoring key.

Changing a Criterion Name

Changing the name of a criterion involves changing the validation name and revising some SQL. If you change the associated field’s token, the request type rules must also be changed.

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Configuration > Validations**.
4. Open the desired PFM Score - *<Criterion Name>* validation.
5. Change the value in the **Name** field.
6. In the **SQL** field, change the value in single quotes in the `WHERE` clause to correspond to the new value in the **Name** field.
7. Open the field associated with the changed criterion in the desired entity (proposal, project, or asset), and specify the changed PFM Score - *<Criterion Name>* validation as the field's validation. The entities are configured using the Request Type Workbench. For more detailed information on configuring request type fields, see the *HP Demand Management Configuration Guide*.
8. (Optional) If you want, you can change the field's token to match the new criterion name. This is an optional step; the field will function as before without changing the token at all.

If you change the field's token, you must modify the appropriate request type rule to take into account the new criterion. The SQL for the rule should be modified to include the new token for the criterion's field.

Adding a New Criterion

Adding a new criterion to the scoring key involves the following major steps:

- Creating a new PFM Score - *<Criterion Name>* validation
- Adding to each affected entity a new field with the new validation and an associated token
- Defining the criterion's values in the Configure Scoring Criteria page
- Adjusting the request type rules for the entities that will use the new criterion



Making adjustments to the scoring key requires knowledge of SQL, which is used in the request type rules that govern the calculation of the **Value Rating**, **Risk Rating**, and **Total Score** fields.

This procedure is illustrated with an example in which a new criterion to be called PR Impact has been requested for the Value Domain. It should have the following entries for the **Value** and **Selection** fields:

- 0 - No impact
- 1 - Slight benefit to existing customer base
- 2 - Large benefit to existing customer base
- 3 - Positive mindshare gain within industry
- 4 - Positive mindshare gain across industry

PR Impact should have a weight of 4, as it is thought to be almost as important as Competitive Advantage or Strategic Match, each of which has a weight of 5 (see *Figure 6-1 on page 51*).

To add a criterion to the scoring key:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.

The PPM Workbench opens.

3. Create a new PFM Score - *<Criterion Name>* validation, which will hold the values for the new criterion:
 - a. From the shortcut bar, select **Configuration > Validations**.

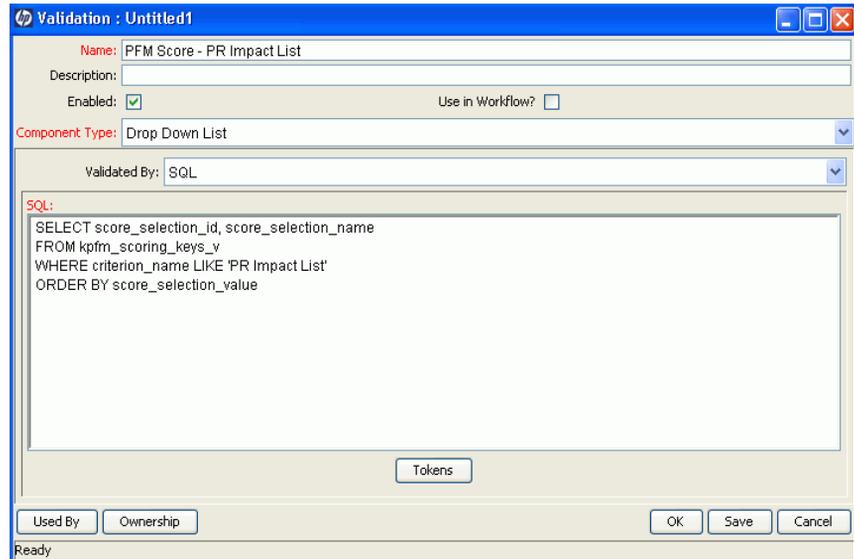


The PFM Score - *<Criterion Name>* validation can be a drop-down list or a single-select auto-complete list, and it must be validated by SQL.

- b. Click **New Validation** to create a new drop-down list validation.
- c. For our example:
 - i. Enter the new validation name **PFM Score - PR Impact List**.
 - ii. For the **Component Type** field, select **Drop Down List**.
 - iii. For the **Validated By** field, select **SQL**.

iv. Specify the following SQL:

```
SELECT score_selection_id, score_selection_name
FROM kpfm_scoring_keys_v
WHERE criterion_name LIKE 'PR Impact List'
ORDER BY score_selection_value
```



d. Click **OK** to save the validation.

4. For each affected entity, use the Request Type Workbench to create a new field that uses the new validation. For detailed information about configuring request type fields, see the *HP Demand Management Configuration Guide*.

For our example:

- a. From the shortcut bar, select **Demand Mgmt > Request Types**.
- b. Select and open a request type affected by the new criterion.
- c. On the **Fields** tab, click **New**.

- d. In the **Field Prompt** field, enter **PR Impact**.
- e. Select **PFM Score - PR Impact List** for the **Validation** field.
- f. Enter **PFM_SCORE_PR_IMPACT** for the **Token** field.

5. Define the criterion's values in the Configure Scoring Criteria page:

- a. In the menu bar of the standard interface, select **Administration > Portfolio Management > Configure Scoring Criteria**.

In our example, the new **PR Impact List** criterion appears at the top of the page.

- b. Click the **Edit** button below the new criterion.

The Edit Criterion page opens.

- c. As previously described for our example:
 - i. In the **Weight** field, enter **4**.
 - ii. Set the **Domain** to **Value Domain**.
 - iii. Under the **Add New Selection** heading, enter one of the five pairs of requested **Value** and **Selection** fields and click **Add**.

Repeat for each of the pairs of **Value** and **Selection** fields.

hp Close Window X

Edit Criterion: PR Impact List

Weight:

Domain: Value Domain

Modify Selection Information		
	Value	Selection
<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="No impact"/>
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="Slight benefit to existing customer base"/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="Large benefit to existing customer base"/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	<input type="text" value="Positive mindshare gain within industry"/>
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	<input type="text" value="Positive mindshare gain across industry"/>

Add New Selection:

Value	Selection	
<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

- d. Click **Done**.
The new criterion is added to the scoring key.
- e. Click **Save** to save the revised scoring key.

6. Edit the request type rules for the entities that will use the new criterion:
 - a. From the shortcut bar in the PPM Workbench, select **Demand Mgmt > Request Types**.
 - b. Select and open a request type affected by the new criterion.
 - c. Click the **Rules** tab.
 - d. Edit either the Calculate Value Rating rule or the Calculate Risk Rating rule, depending on the domain, by adding the new token to the SQL.

In our example, to add the `PFM_SCORE_PR_IMPACT` token to the Calculate Value Rating rule, add the following SQL immediately before the last close parenthesis in the existing SQL, then click **OK**.

```
, NVL ( ' [REQ.P.PFM_SCORE_PR_IMPACT] ' , 0)
```

Rules Window

Rule Name: Calculate Value Rating

Description:

Enabled: Yes No

Rule Event: Apply On Field Change

Rule Type: Advanced Defaults

Dependencies

Field Name	Value
Productivity:	All Values
Strategic Match:	All Values

New Edit Remove

Results:

Field Name	Column	Token
Value Rating:	1	REQ.P.KNTA_VALUE_RATING
	2	REQ.VP.KNTA_VALUE_RATING

SQL:

```
select
sum(weighted_score),sum(weighted_score)
from kpfm_scoring_keys_v
where score_selection_id in
(NVL('REQ.P.PFM_SCORE_IRR',0),
NVL('REQ.P.PFM_SCORE_STRATEGIC_MATCH',0),NVL('REQ.P.PFM_SCORE_COMPETITIVE_ADV',0),
NVL('REQ.P.PFM_SCORE_COMPETITIVE_RESP',0),NVL('REQ.P.PFM_SCORE_PRODUCTIVITY',0),NVL('REQ.P.PFM_SCORE_IRR',0),NVL('REQ.P.PFM_SCORE_STRATEGIC_MATCH',0),NVL('REQ.P.PFM_SCORE_COMPETITIVE_ADV',0),NVL('REQ.P.PFM_SCORE_COMPETITIVE_RESP',0),NVL('REQ.P.PFM_SCORE_PRODUCTIVITY',0),NVL('REQ.P.PFM_SCORE_PR_IMPACT',0))
```

New Remove

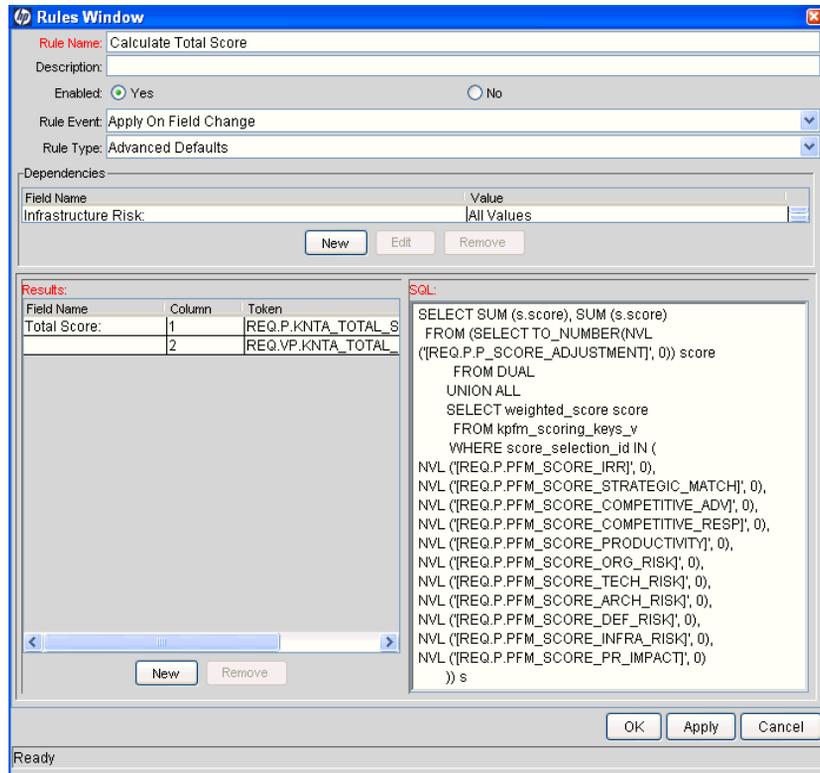
OK Apply Cancel

Ready

- e. From the **Rules** tab, similarly edit the Calculate Total Score rule by adding the new token to the SQL.

In our example, to add the `PFM_SCORE_PR_IMPACT` token to the Calculate Total Score rule, add the following SQL just before the last “)) s” in the existing SQL, then click **OK**:

```
, NVL (' [REQ.P.PFM_SCORE_PR_IMPACT] ', 0)
```



Rules must be modified individually for each entity that will use the new criterion.

7 Configuring Licenses, Security Groups, and Access Grants

Overview of License, Security Groups, and Access Grants

This chapter describes how to enable PPM Center users to use HP Portfolio Management entities and processes, using the Portfolio Management license, security groups, and access grants.

- ▶ Licenses, security groups, and user accounts with access grants are assigned by the PPM Center administrator. Contact your application administrator for matters relating to the HP Portfolio Management license, security groups, and access grants.

A license is authorization granted to users of PPM Center to use one or more individual products. See [Licenses on page 66](#).

- ▶ HP Portfolio Management also requires HP Demand Management. That is, to have an HP Portfolio Management license, a user must also have an HP Demand Management license.

Security groups are constructed to provide a set of users with specific access to screens and functions within HP Portfolio Management. Each security group is configured with a set of access grants that enable specific access. Users are then associated with one or more security groups.

A user's security group memberships determine which entities the user can view or edit, which processes the user can use, and which process steps the user has authority to act on. Each HP Portfolio Management user can be a member of multiple security groups. The collection of security groups to which a user belongs defines that user's role and access within HP Portfolio Management. See [Security Groups on page 67](#).

At a more granular level, a PPM Center administrator uses access grants to provide individuals or groups or users with partial or total access to HP Portfolio Management features. Users are linked to access grants through the security groups to which they belong. If provided with the required access grants, users of HP Portfolio Management can use budgets, staffing profiles, and financial benefits. See *Access Grants* on page 70.

In addition, individual users who create scenario comparisons can provide other users with various levels of access to viewing and editing those scenario comparisons, as described in the *HP Portfolio Management User's Guide*.

Licenses

As described in the following sections, the following licenses are associated with HP Portfolio Management:

- Portfolio Management license
- Portfolio Optimization license

Portfolio Management License

The Portfolio Management license provides access to general HP Portfolio Management functionality and to configuration of general HP Portfolio Management settings. All HP Portfolio Management users must have a Portfolio Management license (and a Demand Management license).

Portfolio Optimization License

The Portfolio Optimization site license allows all users who have Portfolio Management licenses to configure and run scenario optimizations and to generate the efficient frontier graph. For more information, see the *HP Portfolio Management User's Guide*. Users must have a Portfolio Management license to use portfolio optimization.

For each user, access to portfolio optimization functionality is consistent with access to other Portfolio Management functionality.

Security Groups

Using security groups in HP Portfolio Management involves associating them with process (workflow) steps and potentially restricting user access to the HP Portfolio Management entities—proposals, projects, and assets.

Associating Security Groups with Process Steps

HP Portfolio Management provides the following empty security groups that are preconfigured to work with the delivered HP Portfolio Management processes described in *Customizing HP Portfolio Management Processes* on page 33:

- PFM - Finance Review Board
- PFM - IT Steering Committee
- PFM - Standards Committee

These security groups must be populated with the correct users before the processes can be used. For more information on adding users to security groups, see the *Security Model Guide and Reference*.

Using the Workflow Workbench, you can revise the mapping of security groups to process steps to suit your business needs. For more information on configuring process steps, including setting security, see the *HP Demand Management Configuration Guide*.

Setting Security for HP Portfolio Management Entities

Setting security for proposals and assets differs from setting security for projects, as described in the following sections.

Setting Security for Proposals and Assets

By default, all users can create, view, and edit proposals and assets. You can restrict access to proposals and assets to particular security groups. For example, to restrict creation of proposals or assets to users in a particular security group:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types**.
4. Click **List**.

The **Results** tab lists the available request types.

5. Open the **PFM - Proposal** or **PFM - Asset** request type.
The Request Type window opens.
6. Click the **User Access** tab.
7. Deselect the **Create** checkbox for **All Users**.
8. Click **New**.

The Participant Security window opens.

9. Select users at the security group level.
10. Click **OK** in the Participant Security window.
11. Click **OK** in the Request Type window.

For more information on setting request type security, see the *HP Demand Management Configuration Guide*.

Setting Security for Projects

You can control access to projects with the following access grants:

- Project Mgmt: View Projects
- Project Mgmt: Edit Projects
- Project Mgmt: Edit All Projects

For more information, see the *Security Model Guide and Reference*.

If you have the Edit Projects or the Edit All Projects access grant, you can control who can view all projects that use a particular project type, as follows:

1. Log on to PPM Center.
2. From the menu bar, select
Administration > Project Types & Templates > Manage Project Types.
The Manage Project Types window appears, listing the project types.
3. Click the project type of interest.
The Modify Project Type window appears.
4. Under the **Select a policy to configure** heading, select the **Project Security** policy.
5. To control who can view projects of this project type and their tasks, complete the fields as desired and click **Save**.

Access Grants

To use HP Portfolio Management, users need appropriate access grants in the following categories:

- Portfolio Mgmt
- Financial Mgmt, for budgets
- Resource Mgmt, for staffing profiles
- Financial Mgmt, for financial benefits

Portfolio Management Access Grants

The access grants regarding scenario comparisons are listed in *Table 7-1*. If a user does not have the required access grant as described, he cannot view or edit a scenario comparison (or a portfolio optimization), regardless of whether he is authorized to do so on the scenario comparison's Configure Access page. For information about the Configure Access page, see the *HP Portfolio Management User's Guide*.

Table 7-1. Scenario comparison access grants

Access Grant	Description
Portfolio Mgmt: View Scenario Comparison	Allows the user to view any particular scenario comparison that also grants that user access on its Configure Access page (View Access field or Additional Editing Access fields).
Portfolio Mgmt: Edit Scenario Comparison	Allows the user to view, edit, and delete any particular scenario comparison that also grants that user access on its Configure Access page (Additional Editing Access fields). Also allows the user to create new scenario comparisons.
Portfolio Mgmt: Edit All Scenario Comparisons	Allows the user to view, edit, and delete all scenario comparisons in the system. Also allows the user to create new scenario comparisons.

Other HP Portfolio Management access grants are listed in *Table 7-2*.

Table 7-2. Other Portfolio Management access grants

Access Grant	Description
Portfolio Mgmt: Configure Portfolio Management	Allows the user to set tracking options and configure the scoring key.
Portfolio Mgmt: Portfolio Manager	Allows the user to work with portfolio visualizations and scenario comparisons.

Budget Access Grants

The access grants regarding budgets are listed in *Table 7-3*. Without these access grants, a user cannot view or edit a budget, regardless of whether that user is authorized to do so on the budget's Configure Access page.

Table 7-3. Budget access grants

Access Grant	Description
Financial Mgmt: View Budgets	Allows the user to view any particular budget that also grants that user view access on its Configure Access page (View Access field or Additional Editing Access fields).
Financial Mgmt: View All Budgets	Allows the user to view any budget in the system.
Financial Mgmt: Edit Budgets	Allows the user to edit any particular budget that also grants that user edit access on its Configure Access page (Additional Editing Access fields).
Financial Mgmt: Edit All Budgets	Allows the user to edit any budget in the system.
Financial Mgmt: Create Budgets	Allows the user to create new budgets. Supplemental to the Edit Budgets or Edit All Budgets access grant.
Financial Mgmt: Update Budget Status	Allows the user to update the budget status, but nothing else. Supplemental to the Edit Budgets or Edit All Budgets access grant.
Financial Mgmt: Approve Budgets	Allows the user to set the budget status to Approved , but nothing else. Supplemental to the Edit Budgets or Edit All Budgets access grant.

Staffing Profile Access Grants

The access grants regarding staffing profiles are listed in *Table 7-4*. Without these access grants, a user cannot view or edit a staffing profile, regardless of whether that user is authorized to do so on the staffing profile's Configure Access page.

Table 7-4. Staffing profile access grants

Access Grant	Description
Resource Mgmt: View Staffing Profiles	Allows the user to view any particular staffing profile that lists that user on its Configure Access page.
Resource Mgmt: View All Staffing Profiles	Allows the user to view any staffing profile in the system.
Resource Mgmt: Edit Staffing Profiles	Allows the user to edit any particular staffing profile that also grants that user edit access on its Configure Access page.
Resource Mgmt: Edit All Staffing Profiles	Allows the user to edit any staffing profile in the system.
Resource Mgmt: Create Staffing Profiles	Allows the user to create new staffing profiles. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.
Resource Mgmt: Update Staffing Profile Status	Allows the user to update the Profile Status, but nothing else. Supplemental to the Edit Staffing Profiles or Edit All Staffing Profiles access grant.

Financial Benefit Access Grants

The access grants regarding financial benefits are listed in *Table 7-5*. Without these access grants, a user cannot view or edit a financial benefit, regardless of whether that user is authorized to do so on the financial benefit's Configure Access page.

Table 7-5. Financial benefit access grants

Access Grant	Description
Financial Mgmt: View Financial Benefits	Allows the user to view any particular financial benefit that also grants that user view access on its Configure Access page (View Access field or Additional Editing Access fields).
Financial Mgmt: View All Financial Benefits	Allows the user to view any financial benefit in the system.
Financial Mgmt: Edit Financial Benefits	Allows the user to edit any particular financial benefit that also grants that user edit access on its Configure Access page (Additional Editing Access fields).
Financial Mgmt: Edit All Financial Benefits	Allows the user to edit any financial benefit in the system.
Financial Mgmt: Create Financial Benefits	Allows the user to create new financial benefits. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits access grant.
Financial Mgmt: Update Financial Benefit Status	Allows the user to update the financial benefit status, but nothing else. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits access grant.
Financial Mgmt: Approve Financial Benefits	Allows the user to set the financial benefit Status to Approved , but nothing else. Supplemental to the Edit Financial Benefits or Edit All Financial Benefits access grant.

A Financial Metrics

Return on Investment (ROI)

Return on investment is based on the attached budget and financial benefit.

$$\text{ROI} = \text{Total Benefit} - \text{Total Cost}$$

Net Present Value (NPV)

Net present value (NPV) is return on investment (ROI), discounted to its current value, based on a specified discount rate and the time allowed for the ROI to be realized. It is based on the attached budget and financial benefit.

For any *particular* future month:

$$\text{NPV} = (\text{Benefit} - \text{Cost}) / (1 + i/12)^n$$

where

n represents the number of periods (months) from the current month.

Benefit and Cost are as specified for month n.

i represents the annual discount rate. For example, if the **Discount Rate** field (which by default is disabled) is specified as 6 to represent a 6% annual rate, the formula uses 0.06 for the value of i, then divides that by 12 to reflect the 12 months in a year.

HP Portfolio Management computes and reports *total* NPV, which is the sum of these values for all months—past, current, and future—using each month’s particular Benefit and Cost, but with only future months discounted. In other words, past and current months use only their individual calculations of (Benefit – Cost) in the summation. Furthermore, actual rather than projected values are used where available for past months. NPV for past and current months is meaningful for projects that are underway.

Example of a Future Project

For example, consider a four-month project that has benefits and costs as shown in *Table A-1* and an annual discount rate of 6%, equivalent to a monthly rate of 0.5% or .005.

Table A-1. Example for NPV calculation

Month	Benefit	Cost	Benefit – Cost
May 2008	\$100,000	\$90,000	\$10,000
June 2008	\$120,000	\$90,000	\$30,000
July 2008	\$140,000	\$40,000	\$100,000
August 2008	\$140,000	\$5,000	\$135,000

As of March 2008, two months before the project starts, the total NPV is the sum (rounding off to the nearest dollar) of:

- $\$10,000 / (1.005)^2 = \$9,901$ for May
- $\$30,000 / (1.005)^3 = \$29,554$ for June
- $\$100,000 / (1.005)^4 = \$98,025$ for July
- $\$135,000 / (1.005)^5 = \$131,675$ for August

For this example, the total NPV is \$269,155 (whereas the projected total Benefit – Cost for the four project months is \$275,000).

Example of a Project That Is Underway

Now consider the same example when the current month (month 0) is June and the project is underway, and assume that actual values for Benefit – Cost were as planned for May and June. As of June, the total NPV is the sum of:

- \$10,000 for May
- \$30,000 for June
- $\$100,000 / (1.005)^1 = \$99,502$ for July
- $\$135,000 / (1.005)^2 = \$133,660$ for August

Here, the total NPV is \$273,162.

B Changing Fiscal Years and Periods

If your fiscal year differs from the calendar year (for example, your fiscal year starts in November, not January), you can modify period and period group data to affect how this information is displayed in budgets, benefits, scenario comparisons, portlets, reports, and so on. You can also add more periods to your period and period group data if you need to display or enter information beyond the currently displayed time period.



Setting the fiscal year and periods requires changes to period and period group data in the database. Before making any changes to the database, HP recommends that you first back up your period and period group data. See [Backing Up and Restoring Data](#) for more information.

This section describes the following tasks used to set your fiscal year and periods:

- Backing up and restoring period and period group data from the database
- Changing the starting month of the fiscal year
- Changing period names
- Generating additional periods
- Changing a month's start and/or end dates
- Changing Resource Management time periods

Backing Up and Restoring Data

Before making any changes to your period and period group data in the database, HP recommends that you first back up your data. Backing up your period and period group data saves data from the `knta_periods` and `knta_period_groups` tables.

Backing Up Your Data

To back up your period and period group data:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Enter the following command:

```
sh ./kGenPeriods.sh -backup <filename>
```

For example, if you want to save your data to files using the name `period_data_backup`, enter:

```
sh ./kGenPeriods.sh -backup period_data_backup
```

Data from the `knta_periods` table is saved to the `period_data_backup.csv` file, and data from the `knta_period_groups` table is saved to the `period_data_backup_groups.csv` file in the `<PPM_Home>/bin/periods` directory.

When specifying the filename, if no path is specified, the backup files are saved to `<PPM_Home>/bin/periods`. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

Restoring Your Data

Restoring your period and period group data overwrites the current data in the database. Unless the data in the database is corrupted, you may want to back up the current data before running the restore option.



If you have generated new periods and the data to be restored does not contain these new periods, the new periods are lost upon restore. This causes problems with benefits and/or budgets that use these new periods (after the restore, the benefits and/or budgets contain data for nonexistent periods).

To restore your period and period group data:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Enter the following command:

```
sh ./kGenPeriods.sh -restore <filename>
```



The files used to restore data must have been created using the `-backup` option.

For example, if you are restoring your data from the backup files using the name `period_data_backup`, enter:

```
sh ./kGenPeriods.sh -restore period_data_backup
```

Data from the `period_data_backup.csv` file is restored to the `knta_periods` table, and data from the `period_data_backup_groups.csv` file is restored to the `knta_period_groups` table.

When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.



If no file extension is included in the specified filename, `.csv` is automatically appended to the filename. If your backup files were created using a file extension other than `.csv`, specify the file extension in the filename when restoring the data.

See *Overview of the kGenPeriods.sh Script* on page 94 for more information about the options used in this command.

Changing the Starting Month

If the starting month of your fiscal year is not January, you can change the starting month to be any month of the year. Period groups (quarters) are automatically adjusted according to the new starting month.



If you change the starting month in HP Portfolio Management, HP recommends that you make the same changes in HP Resource Management. See *Changing Resource Management Time Periods* on page 92 for more information.

If you have not changed the start and end dates of the months, you can change the starting month using the `kGenPeriods.sh` script.

If you have changed the start and end dates of the months, you can change the starting month by exporting, modifying, and importing a file.

Changing the Starting Month If a Month's Start and End Dates Have Not Changed

If you have not changed the month's start and end dates, to change the starting month of your fiscal year, do the following:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Enter the following command:

```
sh ./kGenPeriods.sh -shift -fiscalStartMonth <month>
-startMonthIsNextFiscalYear <true | false>
```

For example, if November is the start of your next fiscal year, enter:

```
sh ./kGenPeriods.sh -shift -fiscalStartMonth 11
-startMonthIsNextFiscalYear true
```

See [Overview of the kGenPeriods.sh Script on page 94](#) for more information about the options used in this command.

3. Review the `shift_knta_periods_preview.csv` and `shift_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.
4. When you are satisfied with the data generated in the preview files, run the command again but add the `-commit` option to make your changes to the database.

Changing the Starting Month If a Month's Start and End Dates Have Changed

If you have changed a month's start and end dates, to change the starting month of your fiscal year, do the following:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Extract the period data. Enter the following command:

```
sh ./kGenPeriods.sh -export <filename>
```

For example, if you want to export the data to a file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -export extracted_periods
```



When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

3. Edit the data. Using Microsoft® Excel, modify the Fiscal Year and Month Sequence columns.

Column Name	Description
Fiscal Year	Specify the four-digit fiscal year to which this period belongs in YYYY format.
Month Sequence	Specify the month sequence (1 to 12) within the fiscal year where 1 is the first month of the fiscal year and 12 is the last month of the fiscal year.

4. Save the file.
5. Import the data. Enter the following command:

```
sh ./kGenPeriods.sh -import <filename>
```

For example, if you want to import the data from the file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -import extracted_periods
```

When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.



If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

6. Review the `import_knta_periods_preview.csv` and `import_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

- When you are satisfied with the data generated in the preview files, run the command with the `-import` option again but add the `-commit` option to make your changes to the database.

Changing Period Names

Period names are displayed in rows as in the example in *Figure B-1*, where the names of the quarters are **Q1 2008**, **Q2 2008**, and so on, and the names of the months are **Jan 08**, **Feb 08**, and so on.

Figure B-1. Example of period names

Breakdown from March 2008 to September 2008 (Numbers in Table in 000s)									
	Q1 2008			Q2 2008			Q3 2008		
	Jan 08	Feb 08	Mar 08	Apr 08	May 08	Jun 08	Jul 08	Aug 08	Sep 08
Month Total			\$0	\$0	\$0	\$0	\$0	\$0	\$0
Quarter Total			\$0			\$0			\$0

To change period names:

- On the PPM Server, go to the directory that contains the sample period configuration file `fiscalPeriods_sample.conf`:

```
cd <PPM_Home>/bin/periods
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

- Make a copy of the sample file and then edit it. You can edit the short and long period names, the quarter names, and the half-year names. See *About the Period Configuration File* on page 86 for more information.
- Save the file.

4. Go up one level to the directory that contains the `kGenPeriods.sh` script:

```
cd ..  
or  
cd <PPM_Home>/bin
```

5. Enter the following command:

```
sh ./kGenPeriods.sh -relabel -config <filename>
```

For example, if you named the file `myPeriodNames.conf`, enter:

```
sh ./kGenPeriods.sh -relabel -config myPeriodNames.conf
```

When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

6. Review the `relabel_knta_periods_preview.csv` and `relabel_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.
7. When you are satisfied with the data generated in the preview files, run the command again but add the `-commit` option to make your changes to the database.

About the Period Configuration File

The period configuration file is used to define the names of the periods, quarters, and half-years. Create and edit this file to modify the existing names of periods, quarters, and half-years.

If you changed the starting month of the fiscal year using the `-shift` option, the sequence of the periods is automatically adjusted.

For example, if you want the period names to be represented numerically, you would start by defining `short_name_period_1=1` and `long_name_period_1=1`, `short_name_period_2=2` and `long_name_period_2=2`, and continue until you have relabeled all the period names.

If the first month (period) in your fiscal year is November, adjust the sequence by defining `short_name_period_1=11` and `long_name_period_1=11`, `short_name_period_2=12` and `long_name_period_2=12`, and continue until you have relabeled all the period names.

A sample period configuration file is available in `<PPM_Home>/bin/periods/fiscalPeriods_sample.conf`.

Generating Additional Periods

You can add more periods (in yearly increments) to your period and period group data if you need to display or enter information beyond the currently displayed time period.

If you have not changed the start and end dates of the months, you can add more periods using the `kGenPeriods.sh` script.

If you have changed the start and end dates of the months, you can add more periods by exporting, modifying, and importing a file.

Adding Periods If a Month's Start and End Dates Have Not Changed

To add periods to your period and period group data if you have not changed the month's start and end dates, do the following:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Enter the following command:

```
sh ./kGenPeriods.sh -startYear <year1> -endYear <year2>
```

For example, if you want to add periods from 2013 to 2025, enter:

```
sh ./kGenPeriods.sh -startYear 2013 -endYear 2025
```



If part or all of the specified time period exists, it is not regenerated.

If there is a gap between the end of the existing time period and the `startYear`, those periods are also generated.

The total generated time period cannot exceed 30 years.

See *Overview of the `kGenPeriods.sh` Script* on page 94 for more information about the options used in this command.

3. Review the `generate_knta_periods_preview.csv` and `generate_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.
4. When you are satisfied with the data generated in the preview files, run the command again but add the `-commit` option to make your changes to the database.

Adding Periods If a Month's Start and End Dates Have Changed

To add periods to your period and period group data if you have changed the month's start and end dates, do the following:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Extract the period data. Enter the following command:

```
sh ./kGenPeriods.sh -export <filename>
```

For example, if you want to export the data to a file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -export extracted_periods
```



When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

3. Edit the data. Using Microsoft Excel, add more periods to the end of the exported file.

Add the following information:

Column Name	Description
Period ID	Leave this column blank. The system automatically generates the ID.
Fiscal Year	Specify the four-digit fiscal year to which this period belongs in YYYY format.
Month Sequence	Specify the month sequence (1 to 12) within the fiscal year where 1 is the first month of the fiscal year and 12 is the last month of the fiscal year.
Start Date	Specify the start date of the month in YYYY-MM-DD format.
End Date	Specify the end date of the month in YYYY-MM-DD format.



Periods must be added in yearly increments. That is, you must add 12 periods. Also, there cannot be gaps (missing dates) between the end date of one period and the starting date of the next period.

4. Save the file.
5. Import the data. Enter the following command:

```
sh ./kGenPeriods.sh -import <filename>
```

For example, if you want to import the data from the file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -import extracted_periods
```



When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

6. Review the `import_knta_periods_preview.csv` and `import_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.
7. When you are satisfied with the data generated in the preview files, run the command with the `-import` option again but add the `-commit` option to make your changes to the database.

Changing a Month's Start and End Dates

If the start date of your period is not the first day of the month and the end date of your period is not the last day of the month, you can change the start and end dates to be any day of the month.



If financial data exists and you change a month's start and end dates, the data becomes inaccurate and meaningless (because it is stored by months, not days).



If you change a month's start and end dates in HP Portfolio Management, you *must* make the same changes in HP Resource Management. See [Changing Resource Management Time Periods on page 92](#) for more information.

To change a month's start and end dates:

1. On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

```
cd <PPM_Home>/bin
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Extract the period data. Enter the following command:

```
sh ./kGenPeriods.sh -export <filename>
```

For example, if you want to export the data to a file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -export extracted_periods
```

When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See [Overview of the `kGenPeriods.sh` Script on page 94](#) for more information about the options used in this command.

3. Edit the data. Using Microsoft Excel, modify only the Start Date and End Date columns.

Column Name	Description
Start Date	Specify the start date of the month in YYYY-MM-DD format.
End Date	Specify the end date of the month in YYYY-MM-DD format.

There cannot be gaps (missing dates) between the end date of one period and the start date of the next period.

4. Save the file.
5. Import the data. Enter the following command:

```
sh ./kGenPeriods.sh -import <filename>
```

For example, if you want to import the data from the file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -import extracted_periods
```



When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See *Overview of the `kGenPeriods.sh` Script* on page 94 for more information about the options used in this command.

6. Review the `import_knta_periods_preview.csv` and `import_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.
7. When you are satisfied with the data generated in the preview files, run the command with the `-import` option again but add the `-commit` option to make your changes to the database.

If you need to change the starting month of your fiscal year or generate additional periods after modifying a month's start and/or end dates, you cannot use the `kGenPeriods.sh` script. Instead, you must export the data, modify the file, and import the file. See *Changing the Starting Month If a Month's Start and End Dates Have Changed* on page 83 or *Adding Periods If a Month's Start and End Dates Have Changed* on page 88 for more information.

Saving Your Changes to the Database

Setting the fiscal year requires changes to period and period group data in the database. Before making any changes to the database, HP recommends that you first back up your period and period group data. See *Backing Up and Restoring Data* on page 80 for more information.

When you run the script to change data, you must include the `-commit` option in order to save your changes to the database.

Changing Resource Management Time Periods

If you change a month's start and end date in HP Portfolio Management, you *must* make the same changes in HP Resource Management.

If you change the starting month in HP Portfolio Management, HP recommends that you make the same changes in HP Resource Management.



Editing the `periods.xml` is complicated. HP strongly recommends backing up the PPM Server and contacting HP Professional Services for assistance.

To change HP Resource Management time periods:

1. On the PPM Server, go to the directory that contains the `periods.xml` file:

```
cd <PPM_Home>/conf/periods
```

where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2. Edit the `periods.xml` file.
3. Go to the directory that contains the `kGenFlexTimePeriods.sh` script:

```
cd ../../bin
```

or

```
cd <PPM_Home>/bin
```

4. Update the time periods. Enter the following command:

```
sh ./kGenFlexTimePeriods.sh
```

Overview of the kGenPeriods.sh Script

The following sections describe the syntax and optional parameters for the kGenPeriods.sh script.

Syntax

The syntax of the kGenPeriods.sh script is as follows:

```
kGenPeriods.sh
[-h | -help]
[-backup <filename>]
[-restore <filename>]
[-shift -fiscalStartMonth <month>
  -startMonthIsNextFiscalYear <true|false>]
[-startYear <year1> -endYear <year2>]
[-relabel -config <filename>]
[-export <filename>]
[-import <filename> [-config <filename>]]
[-validate]
[-fileEncoding <encoding>]
[-commit]
```

Options

Table B-1 lists the options for the `kGenPeriods.sh` script.

Table B-1. Options for the `kGenPeriods.sh` script (page 1 of 4)

Option	Description
<code>-backup <filename></code>	<p>Copy data from the <code>knta_periods</code> table to the <code><filename>.csv</code> file and from the <code>knta_period_groups</code> table to the <code><filename>_groups.csv</code> file.</p> <p>When specifying the filename, if no path is specified, both files are saved in the <code><PPM_Home>/bin/periods</code> directory. If a path is specified, it should be an absolute path or a path relative to <code><PPM_Home></code>.</p> <p>Note: <code>.csv</code> is automatically appended to the end of the filenames unless you specify a different file extension.</p>
<code>-commit</code>	<p>Commit changes to the database. If this option is not specified, any changes you make are not saved to the database.</p>
<code>-config <filename></code>	<p>Specify the period configuration file. This file is used to relabel period names or when running an import and no period data exists in the database.</p> <p>When specifying the filename, if no path is specified, <code><PPM_Home>/bin/periods</code> is used as the default path. If a path is specified, it should be an absolute path or a path relative to <code><PPM_Home></code>.</p> <p>Use with the <code>-relabel</code> or <code>-import</code> options.</p> <p>See About the Period Configuration File on page 86 and the <code>fiscalPeriods_sample.conf</code> sample file for more information.</p>
<code>-endYear <year></code>	<p>Generate additional periods (if they do not exist) up to the specified year (in YYYY format).</p> <p>Use with the <code>-startYear</code> option.</p> <p>If part or all of the specified time period exists, it is not regenerated. If there is a gap between the end of the existing time period and the <code>startYear</code>, those periods are also generated. The total generated time period cannot exceed 30 years.</p>

Table B-1. Options for the kGenPeriods.sh script (page 2 of 4)

Option	Description
-export <filename>	<p>Export fiscal month data from the knta_periods table to the <filename>.csv file.</p> <p>When specifying the filename, if no path is specified, <PPM_Home>/bin/periods is used as the default path. If a path is specified, it should be an absolute path or a path relative to <PPM_Home>.</p> <p>The file contains five columns of data: Period ID, Fiscal Year, Month Sequence, Start Date, and End Date. See the -import option for more information about these columns of data.</p>
-fileEncoding <encoding>	<p>Specify the encoding of the files used in the script. You may specify any IANA supported encoding such as ISO-8859-1 or GB2312.</p> <p>Default: UTF-8.</p>
-fiscalStartMonth <month>	<p>Specify the starting month of the fiscal year to which to shift. The month is in MM format (specify a number from 1 to 12). Use with the -shift and -startMonthIsNextFiscalYear options.</p>
-h -help	<p>Display the command usage.</p>

Table B-1. Options for the kGenPeriods.sh script (page 3 of 4)

Option	Description
<p>-import <filename></p>	<p>Import fiscal month data from <filename>.csv to the knta_periods and knta_period_groups tables. If you want to create a new import file, you should copy and modify an existing exported file.</p> <p>When specifying the filename, if no path is specified, <PPM_Home>/bin/periods is used as the default path. If a path is specified, it should be an absolute path or a path relative to <PPM_Home>.</p> <p>The import file must have five columns:</p> <ul style="list-style-type: none"> • Period ID should not be modified and should be left blank for new records • Fiscal Year specifies the four-digit fiscal year (YYYY format) • Month Sequence specifies the month sequence (1 to 12) within the fiscal year • Start Date specifies the start date of the month in YYYY-MM-DD format • End Date specifies the end date of the month in YYYY-MM-DD format <p>If no period data exists in the database, you must specify a period configuration file. See the <code>fiscalPeriods_sample.conf</code> sample file.</p>
<p>-relabel</p>	<p>Relabel the period names based on the settings in period configuration file. Use with the <code>-config</code> option.</p> <p>See About the Period Configuration File on page 86 and the <code>fiscalPeriods_sample.conf</code> sample file for more information.</p>

Table B-1. Options for the kGenPeriods.sh script (page 4 of 4)

Option	Description
<p>-restore <filename></p>	<p>Restore data from <filename>.csv to knta_periods table and <filename>_groups.csv to knta_period_groups table.</p> <p>When specifying the filename, if no path is specified, both files must be located in the <PPM_Home>/bin/periods directory. If a path is specified, it should be an absolute path or a path relative to <PPM_Home>.</p> <p>The files used to restore data must have been created using the -backup option. If your backup files were created using a file extension other than .csv, specify the file extension in the filename when restoring the data.</p>
<p>-shift</p>	<p>Shift the starting fiscal month of periods. Use with the -fiscalStartMonth and -startMonthIsNextFiscalYear options.</p>
<p>-startMonthIsNextFiscalYear <true false></p>	<p>Specify if the shifted start date is the start of the current fiscal year or the next fiscal year, where:</p> <ul style="list-style-type: none"> • true indicates the shifted start date is the start of the next fiscal year • false indicates the shifted start date is the start of the current fiscal year <p>Use with the -shift and -fiscalStartMonth options.</p>
<p>-startYear <year></p>	<p>Generate additional periods (if they do not exist) from the specified year (in YYYY format).</p> <p>Use with the -endYear option.</p> <p>If part or all of the specified time period exists, it is not regenerated. If there is a gap between the end of the existing time period and the startYear, those periods are also generated. The total generated time period cannot exceed 30 years.</p>
<p>-validate</p>	<p>Validate existing period and period group data in the database. The status and outcome (succeeded or failed) of running the validation is displayed.</p>

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