Project and Portfolio Management Center

Software Version: 9.63

Portfolio Management Configuration Guide

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Chapter 1: Getting Started with Portfolio Management Configuration

As a system administrator, you can configure PPM Portfolio Management in the following aspects, in order to provide portfolio managers an environment that is more aligned to your business needs.

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Note: You can also customize lifecycle entities and their workflow processes. For this information, see the *Demand Management Configuration Guide*.

Chapter 2: Configuring Portfolio and Scenario Comparison Options

- "Configuring Columns for Portfolio's Proposals/Projects/Assets and Scenario Comparisons"
- "Setting Categorization Preferences for Scenario Comparisons"
- "Setting Financial Metrics for Analyze Current Portfolio"

Configuring Columns for Portfolio's Proposals/Projects/Assets and Scenario Comparisons

In the **Proposals/Projects/Assets** section of the Portfolio Contents tab and in the Scenario Content table, there are already some out-of-box columns that portfolio managers can choose to show or hide. In addition to these columns, you can configure which PFM request fields portfolio managers can display as columns in the two locations.

To do so, you should have the Configure Portfolio Management access grant.

1. From the menu bar, select **Open > Administration > Portfolio Management > Configure Portfolio and Scenario Comparison Options.** The Configure Portfolio and Scenario Comparison Options page opens.

2. In the **Columns on Portfolio Proposals/Projects/Assets Tabs and in Scenario Comparisons** section, in the **Available Columns** list on the left, use the arrow buttons to select up to 20 columns that you want portfolio managers to be able to display.

   - **Available Columns**:

     the full set of fields that you can allow users to display is the combination of all the request fields in the request types that are using PFM - Proposal, PFM - Project, or PFM - Asset request header types.

     In at least one of the PFM request types, fields that you want to make available for display must be configured (in the PPM Workbench) with both the **Display on Search and Filter** option and the **Display** option set to **Yes.**

     > **Note:** A field is made available even if it has different validation types in different request types. However, the data in the displayed column of the scenario comparison or portfolio might not be formatted consistently or as expected, so the validation types should at least be compatible.
     >
     > For example, displaying various types of text fields in a column might be acceptable. However, if inconsistent formatting of the data is unacceptable, you should check the field definitions in the request types and establish unique fields for them that each use appropriate validations so that they will appear as separate columns.

   - **Selected Columns**: the set of fields that portfolio managers can display for

proposals/projects/assets in any portfolio or the Scenario Content table of any scenario comparison.

The fields you select are the only request fields that portfolio managers can display for the proposals, projects, and assets. They can show or hide those fields in the **Proposals/Projects/Assets** section of that portfolio.

If a portfolio manager does not have field-level security access to particular fields for particular proposals/projects/assets, those fields (columns) will be blank for the proposals/projects/assets.

> **Note:** If you select **Nominal Return** and **Net Present Value** from the Available Columns, portfolio managers can add them to the **Proposals/Projects/Assets** tab of a portfolio. However, those fields will appear only if the portfolio managers set the **Fiscal Year** field on the tab to **Total** to display the sum of all years.

3. Click **Done.**

Configuring Columns for Portfolio Timeline

The instructions are the same as "Configuring Columns for Portfolio's Proposals/Projects/Assets and Scenario Comparisons".

Setting Categorization Preferences for Scenario Comparisons

You can decide whether Portfolio Management displays per period the budget of lifecycle entities that are grouped by project class or asset class for each scenario.

To do so, you should have the Configure Portfolio Management access grant.

1. From the menu bar, select **Open > Administration > Portfolio Management > Configure Portfolio and Scenario Comparison Options.** The Configure Portfolio and Scenario Comparison Options page opens.

2. In the **Scenario Comparison Categorization Preferences** section, select the desired categories.

   - If you select **Project Class**, Scenario Comparison page will display the **Budget By Project Class** tab that shows the budget of lifecycle entities grouped by project class for each scenario.

   - If you select **Asset Class**, Scenario Comparison page will display the **Budget By Asset Class** tab that shows the budget of lifecycle entities grouped by asset class for each scenario.

3. Click **Done.**

Only the filter fields and graphs related to the selected categories are displayed in scenario comparisons.

Setting Financial Metrics for Analyze Current Portfolio

You can select the financial information you would like Portfolio Management to present in the Analyze Current Portfolio portlet and page.

To do so, you should have the Configure Portfolio Management access grant.

1. From the menu bar, select **Open > Administration > Portfolio Management > Configure Portfolio and Scenario Comparison Options.** The Configure Portfolio and Scenario Comparison Options page opens.

2. Use the check boxes in the **Metrics Shown on Current Portfolio** section to select the desired financial metrics.

   You can track any combination of the following metrics:

   Custom Field Value: A custom field value is a metric you define for use in portfolios. For more information on configuring the custom field value, see "Configuring a Custom Financial Metric" on page 8.

3. Click **Done.**

The selected metrics become available to be used as filters for which the users can specify ranges of values, and as the horizontal or vertical axis in the bubble charts of the Analyze Current Portfolio portlet and page. Only fields and graphics related to the selected metrics are displayed.

Chapter 3: Configuring a Custom Financial Metric

PPM provides some out-of-box industry-standard financial metrics, such as Nominal Return and Net Present Value, to measure the performance of proposals/projects/assets. In addition to these financial metrics, you can customize a financial metric for portfolio managers.

Before you configure

Here are some examples of custom financial metrics that can be used:

- 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 forecast and actual costs and benefits.

- 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.

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

How to configure a custom financial metric

PPM recommends that the custom financial metric be a numeric text field. Fields of other types might not appear in Portfolio Management pages.

1. Activate the **Custom Field Value** using the Configure Portfolio Management page.

    a. Log on to PPM.

    b. From the menu bar, select **Open > Administration > Portfolio Management > Configure Portfolio and Scenario Comparison Options.** The Configure Portfolio and Scenario Comparison Options page opens.

    c. Select the **Custom Field Value** check box.

    d. Click **Done.**

2. Enable the display of **Custom Field Value** for display.

    a. From the menu bar, select **Open > 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 one of the request types 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 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.

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

d. Save the request type.

4. Repeat step 3 for any other PFM request types that will use the **Custom Field Value.**

Chapter 4: Adjusting Risk and Value Scoring Key

You can change or add scoring criteria and their values for Risk Score and Value Score.

To do so, you should have the Configure Portfolio Management access grant.

Changing an Existing Criterion

To change the properties of an existing criterion:

1. Log on to PPM.

2. From the menu bar, select **Open > Administration > Portfolio Management > Configure Scoring Criteria.** The Configure Scoring Criteria page opens.

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

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

4. Make the desired changes to the criterion.

- You can change any of the following fields:
  - **Weight**: weight of the criterion
  - **Domain**: whether the criterion impacts risk score or value score calculation
  - **Criterion Name**
  - **Value**: value of each drop-down text of the criterion
  - **Selection**: drop-down text of the criterion
- You can also add values and selections to the criterion.

  Suppose in this example that you want to add a value of 7 that represents "Negative impact to standard architecture." Type these entries 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.

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

Adding a New Criterion

Note: 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.

1. Log on to PPM.

2. From the menu bar, select **Open > Administration > Open Workbench.**

3. Create a new validation for the values for the new criterion.

   a. From the shortcut bar, select **Configuration > Validations.**

      > **Note:** The 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. Specify the validation fields.

      i. In the **Name** field, type the new validation name. For example, PR Impact.

      ii. Click out of the validation's **Name** field to get the **Reference Code** field automatically filled.

         > **Note:** All reference codes for validations used for scoring criteria must begin with **PFM_SCORE_.**

      iii. To enable the validation as a scoring criterion, add **PFM_SCORE_** to the beginning of the reference code. For example. **PFM_SCORE_PR_IMPACT.**

      iv. For the **Component Type** field, select **Drop Down List.**

      v. For the **Validated By** field, select **SQL.**

      vi. Specify the following SQL:

         ```
         SELECT score_selection_id, score_selection_name
         FROM kpfm_scoring_keys_v
         WHERE validation_reference_code='<validation_reference_code>'
         ```

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

4. Create a new field that uses the new validation for a lifecycle entity you want to be affected by the new criterion.

   a. From the shortcut bar, select **Demand Mgmt > Request Types.**

   b. Click **List** and select and open a request type, such as PFM - Proposal, that is affected by the new criterion.

   c. On the **Fields** tab, click **New.** The Field: New page opens.

   d. In the **Field Prompt** field, type the field name. For example, PR Impact.

   e. In the **Validation** field, select the validation you created in step 3. For example, PR Impact.

   f. In the **Token** field, type the reference code for the validation. For example, PFM_SCORE_PR_ IMPACT.

   g. Click **OK** on the Field: New page.

   h. Click **Save** on the Request Type page.

5. Edit the request type rules for the lifecycle entity you want to be affected by the new criterion.

   a. Click the **Rules** tab on the request type.

   b. Edit either the Calculate Value Rating rule or the Calculate Risk Rating rule, depending on the

domain of the new criterion, by adding the new token to the SQL.

To add the `PFM_SCORE_PR_IMPACT` token to the Calculate Value Rating rule:

    i. Double-click Calculate Value Rating.

    ii. In the **Dependencies** section, click **New,** select **PR Impact** as the **Field,** select **contains any value** as the **Condition,** and click **OK.**

    iii. Add the following SQL immediately before the last close parenthesis in the existing SQL:

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

    iv. Click **OK.**

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

To add the `PFM_SCORE_PR_IMPACT` token to the Calculate Total Score rule:

    i. Double-click Calculate Total Score.

    ii. In the **Dependencies** section, click **New,** select **PR Impact** as the **Field,** select **contains any value** as the **Condition,** and click **OK.**

    iii. Add the following SQL just before the last `))` `s` in the existing SQL:

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

    iv. Click **OK.**

d. Click **OK** on the Request Type page.

6. Repeat step 4 and step 5 for each lifecycle entity that will use the new criterion.

7. Define the criterion's values in the Configure Scoring Criteria page. For details, see "Changing an Existing Criterion".

Chapter 5: Configurations for Portfolio Epics

To enable portfolio managers to have portfolio epics implemented in agile projects, you should create and configure agile instances for the targeted agile projects, and schedule background service to sync information between PPM and agile projects.

PPM 9.42 supports implementing portfolio epics in agile projects that are run in ALM Octane and JIRA only.

Creating and Configuring Octane Instances

1. From the menu, select **Open** > **Administration** > **Integrations**.
2. In the Enterprise Agile tab, click the **+** icon of the ALM Octane connector to create an agile instance.
3. Provide the following information in the **General** tab.

Field	Description
Instance Name	Specify a unique name for the instance. **Note:** The instance name should not exceed 50 characters. Do not contain such special characters as `<>`.
Base URL	URL of ALM Octane server.
Proxy Host	Host name of the proxy if you have configured proxy for PPM Serer to access the Internet
Proxy Port	Port of the proxy if you have configured proxy for PPM Server to access the Internet.
Use Global Proxy	Whether or not to use the proxy specified in the parameter `HTTP_PROXY_URL`.
Client ID	The client ID to use when connecting to ALM Octane.
Client Secret	The password for the client that is connecting to ALM Octane.

4. Click **Save** and go to the **Advanced** tab:
   a. Click the **Select Agile Projects** link.
   b. From the Available Agile Projects column, select the agile projects where portfolio epics are to be added and implemented, and click **Save**.
   c. Select the option **Use Selected Agile Projects Group with Portfolio Epics**.
5. Click **Save**.

Creating and Configuring JIRA Instances

1. From the menu, select **Open** > **Administration** > **Integrations**.
2. In the Enterprise Agile tab, click the **+** icon of the JIRA connector to create an agile instance.
3. Provide the following information in the **General** tab.

Field	Description
Instance Name	Specify a unique name for the instance.
	Note: The instance name should not exceed 50 characters. Do not contain such special characters as <>.
Base URL	URL of JIRA server.
Proxy Host	Host name of the proxy if you have configured proxy for PPM Serer to access the Internet
Proxy Port	Port of the proxy if you have configured proxy for PPM Server to access the Internet.
Admin account information for portfolio epics & agile data sync	
Admin Username Admin Password	Username and password of the account used to retrieve agile data and portfolio epic from agile projects in JIRA
	The account information decides which agile projects you can select in the **Advanced** tab.
	Note: If you do not use portfolio epics or Agile Projects portlets for JIRA agile projects, you can just enter invalid account information.
Work plan integration - sync story points to task user data fields	
Sync Story Points to	For each imported issue, its story points is synchronized to the selected task user data field.
Sync Epic Content Story Points to	For each imported issue, the sum of story points of its epic's contents is synchronized to the selected task user data field.
	The sum does not include story points of sub-tasks or of the epic's contents that are not imported to the PPM work plan.

4. Click **Save** and go to the **Advanced** tab:
   a. Click the **Select Agile Projects** link.
   b. From the Available Agile Projects column, select the agile projects where portfolio epics are to be added and implemented, and click **Save**.

    c. Select the option **Use Selected Agile Projects Group with Portfolio Epics**.

5. Click **Save**.

Scheduling Service for Portfolio Epics

The Agile Data Sync Service runs as you scheduled to sync the actual progress information of related epics to PPM. To schedule the service:

1. From the menu, select **Open** > **Administration** > **Schedule Services**.

2. Locate the Agile Data Sync Service, change the status to Enabled, and adjust the schedule type and time interval.

3. Click **Save**.

Chapter 6: Configuring Licenses and Access Grants

This section describes the licenses and access grants related to Portfolio Management. You enable individual users or security groups to view or edit a certain page by assigning them required licenses and access grants. Those without the licenses or access grants cannot view or edit the page.

Portfolio Management Licenses

The following licenses are associated with Portfolio Management:

Portfolio Management License

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

Portfolio Optimization License

It allows all users who have the Portfolio Management License to configure and run scenario optimizations and to generate the efficient frontier graph.

Portfolio Management Access Grants

Access Grant	Description
Configure Portfolio Management	Users with the access grant are allowed to configure the settings in the Configure Portfolio and Scenario Comparison Options.
Create Portfolios (available in PPM 9.62)	Users with the access grant are allowed to create portfolios.
Edit All Portfolios	Users with the access grant are allowed to: • View and edit all portfolios in the system. • Create new portfolios. • Delete empty portfolios. • View and edit the Analyze Current Portfolio page and Portfolio Management portlets. • Create and edit business objectives.

Access Grant	Description
Edit Portfolio	Users with the access grant are allowed to: • Create new portfolios. • View the portfolios where the users are also given the View Portfolio or Edit Portfolio access right on the Configure Access page. • Edit the portfolios where the users are also given the Edit Portfolio access right on the Configure Access page. However, having the Edit Portfolio access grant and the Edit Portfolio access right is not sufficient to allow the user to edit a portfolio's access rights or portfolio managers. • Be available for selection in the **Portfolio Manager** auto-complete field in all portfolios. • Be available for addition to the Configure Access page to be given the View Portfolio and Edit Portfolio access rights.
View All Portfolios	Users with the access grant are allowed to: • View all portfolios in the system. • View and edit the Analyze Current Portfolio page and Portfolio Management portlets.
Manage KPIs	Users with the access grant are allowed to: • Add and modify KPIs.
Edit All Scenario Comparisons	Users with the access grant are allowed to: • View, edit, and delete all scenario comparisons in the system. • Create new scenario comparisons.
Edit Scenario Comparison	Users with the access grant are allowed to: • View, edit, and delete any scenario comparison that also grants the users access on its Configure Access page (**Additional Editing Access** fields). • Create new scenario comparisons.
View Scenario Comparison	Users with the access grant are allowed to view any scenario comparison that also grants that userr access on its Configure Access page (**View Access** field or **Additional Editing Access** fields)

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