CONTENTS

OVERVIEW .................................................................................................................. 2

IN-TAKING PROJECT REQUESTS .............................................................................. 3
  Foundational Setup Items .................................................................................. 3
  Security Role Configuration .............................................................................. 3
  User Profile Configuration .............................................................................. 4
  Components of a Project Request ..................................................................... 4
  Project Request Sections .................................................................................. 4
  General Section and Custom Attributes (Fields) .............................................. 5
  Project Request Goals ...................................................................................... 6
  Systems Affected and Related Processes ......................................................... 7
  Organizational Risks and Risk Register ............................................................ 7
  Benefits ............................................................................................................ 8
  Time and Expenses .......................................................................................... 8
  Resources ......................................................................................................... 8
  Stakeholders .................................................................................................... 9
  Plans ................................................................................................................ 9
  Milestones ....................................................................................................... 9

SCORING PROJECT REQUESTS AND PROJECTS ..................................................... 10
  Goals calculation ............................................................................................. 10
  Risks calculation ............................................................................................. 10
  Scorecard Criteria Calculation ....................................................................... 11
  Composite Score PCT Value .......................................................................... 11

PROJECT REQUEST WORKFLOWS ........................................................................ 12
  Creating Project Request Workflows ............................................................... 12
  Configuring Project Request Workflow Steps ............................................... 12
  Enabling Project Request Workflows .............................................................. 13

PROJECT EXPENSE ENTRY ...................................................................................... 14
  Creating Expense Types .................................................................................. 14
  Adding Expense Codes to Projects ................................................................ 14
    Associating expenses with a Project Type ...................................................... 15
    Adding an expense to an existing project ...................................................... 15
  Expense Types and budget contribution ......................................................... 15
  Adding Actual Expenses to Projects ............................................................... 15
Welcome to TeamDynamix! This document shall serve as a guide to implementing the feature set surrounding Project and Portfolio Management within the TeamDynamix application. This will serve as a supplement document to the consultation you will receive from your assigned TeamDynamix Implementation Consultants. This document shall focus on the core configuration items around building project requests and projects. Please refer to the Foundational Configuration guide as well as the Project Manager Supplement training guide for additional information.
IN-TAKING PROJECT REQUESTS

TeamDynamix has the ability to in-take project requests so that the requests can be evaluated and considered for future delivery. Project requests can be created in one of two ways. First, a request can be directly created within the Portfolio Planning application. This method is used predominantly by members of the Project Management Office or the group that reviews and evaluates project requests. Alternatively, a request can be submitted from the TeamDynamix Client Portal. This method is most commonly used by client requestors, such as faculty members and other staff. An overview of the project request and portfolio management system can be found in the TeamDynamix Community.

Foundational Setup Items

Before a request can be submitted from the Client Portal or created within the Portfolio Planning application, several items must be configured within TeamDynamix.

Security Role Configuration

It is important to note that only Enterprise-level (i.e. license type) users have access to the Portfolio Planning application.

1. Sign-in to TDAadmin and click on User & Roles > Security Roles
2. If a security role that is set to an Enterprise-level license does not currently exist, click the New button to create a new role.
3. Give the role a descriptive name and then set the license type value to “Enterprise”.
4. The license type value dictates which of the individual permissions can be selected. In order to create project requests from the Portfolio Planning application a user must have the Portfolio Planning application, which is part of the Enterprise license level.
User Profile Configuration

A user’s profile must be setup correctly in order to submit or create project requests.

1. Sign-in to TDAdmin and click on Users & Roles > Users.
2. Click on a user’s name to open the profile window and then click on the Applications tab.
3. All users inherently have access to the TeamDynamix Client Portal. However, to also submit project requests from the Client Portal a user needs the following applications:
   a. Services
   b. Project Requests
4. In order to create project requests from the Portfolio Planning application, a user must be in an Enterprise-level security role. Set the user’s security role by going to General tab of the user profile window and selecting an Enterprise-level security role.

Components of a Project Request

Before a request can be submitted from the Client Portal or created within the Portfolio Planning, certain configuration items must be setup.

Project Request Sections

It is possible to enable different sections of the project request (Business Case) window during the initial request, the review process, and after the project request is converted to a project. To enable/disable sections, follow these steps:

1. Login to TDAdmin and navigate to Portfolio Planning > Project/Request sections. This same configuration area can be found within the Projects & Workspaces area of TDAdmin.
2. Click Edit next to each section to enable/disable during the initial request, review, and after the request is converted to a project. It is also possible to rename the section from this area.

Project/Request Sections

<table>
<thead>
<tr>
<th>Order</th>
<th>Name</th>
<th>Display Name</th>
<th>For Requests</th>
<th>For Review</th>
<th>For Projects</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>General</td>
<td>General Information</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Customers</td>
<td>Customer Information</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Project Goals</td>
<td>Project Goals</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Scope</td>
<td>Scope</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Standards</td>
<td>Standards</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Risk Analysis</td>
<td>Risk Analysis</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Resources</td>
<td>Resources</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Control Plan</td>
<td>Control Plan</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Contract</td>
<td>Contract</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Work Break</td>
<td>Work Break</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Time Line</td>
<td>Time Line</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
<tr>
<td>0</td>
<td>Milestones</td>
<td>Milestones</td>
<td>True</td>
<td>True</td>
<td>True</td>
</tr>
</tbody>
</table>
3. Here you can see that the System Affected section is set to “False” for Requests. Therefore, when creating a new project request from the Portfolio Planning application (or from the Client Portal), this section will not be visible.

General Section and Custom Attributes (Fields)
The General section contains the standard fields necessary to create a project request or project. It also includes any custom attributes/custom attribute sections.

In order to begin creating project requests and projects, several items must be configured so that the fields can be populated on the General section.

Sponsor
There can be one sponsor per project request/project and the sponsor field is a look-up to the People database. Any customer or user record can be a sponsor. To create a new person, simply click the “plus” icon next to the Sponsor field. Alternatively, go to the People application and click the “+ New Person” button.

Acct/Dept
The Acct/Dept field represents the Department for which the project is being requested. Typically, this value would be populated from the sponsor’s default Acct/Dept value found on the user profile.

Follow these steps to set the default Acct/Dept:

1. Login as to TDAadmin and expand the entity name in the left-hand navigator.
2. Click on “Users & Roles” > Users and then click on a user’s name.
3. Populate the Default Acct/Dept value on the user’s profile.

To create new Acct/Dept values, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Click on Organization Settings and then click on Accts/Depts
3. Click the New button to create a new Acct/Dept.

It is possible to populate several additional elements when creating an Acct/Dept, such as an alphanumeric code, billing address, and industry. This information may be necessary if time and expense data logged against an Acct/Dept is to be exported. If this is not the case, the Name field is the only created field to create a new Acct/Dept.

Service
Service represents the Service Catalog item that is associated with the project request or project. If the project request is being submitted from the Client Portal, the service field will be populated with the service that the customer selected. To create a new Service, follow these steps:
1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Click on Service Catalog and then Services.
3. Click the New button to create a new Service

To create a new service, many fields on the new service window will need to be populated. An explanation of each field can be found by expanding the triangle icon next to the field name.

**Type**

The type field is used to identify the nature of the work being done on a project. Common project type examples are Software Implementation; Application Development; Network and Infrastructure; Telecommunication; Business Analysis, and so on. In addition to describing the nature of work, the Project Type field also determines if where the project request will be routed for evaluation. For more information on project request workflows, please review the associated section of this document. To create a new project type, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Click on Projects & Workspaces or Portfolio Planning and then click on Types. Both the Projects & Workspaces and Portfolio Planning sections contain a link to configure project types as it is applicable to both project requests and projects.
3. After clicking on Types, click the New button to create a new project type.

There are several pieces of information that must be specified when creating a new project type.

- **Category** – Types can be placed in a category for organizational purposes. The type category is primary used for reporting purposes as it is easy to select a category for a report rather than having to select each individual type contained within the category.
- **Evaluator** – The Evaluator is the person that is responsible for placing the project request into a project request workflow once it is submitted by the Requestor. The Evaluator field is required but the Evaluator may not have to take immediate action on each request. Project requests can be configured to automatically enter a workflow based on the association between the project type value and the workflow. It is only for requests that do not automatically enter a workflow that the Evaluator must take action. Any question requiring workflow assignment can be found in the Portfolio Planning application under the Evaluator’s Awaiting My Workflow Assignment link.
- **Assign Project Requests to Workflow** – If a project request is to automatically enter a workflow upon submission, the workflow can be specified in this field.

**Project Request Goals**

When creating a project or project request, goals can be added to the request/project by selecting from a pre-populated list. The requestor/creator can click the “Add” button and select a goal. This process can be repeated to add additional goals to the request/project.

It is important to note that Goals will contribute to scoring. Information about the score calculation can be found in another section of this document. To make goals available for selection, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Expand the Portfolio Planning and then click on Goals.
3. Click the New button to add a goal.

The Goals Percent of Value indicates the scorecard weighting for the Goals section. Refer to the scoring section of this document for further information.

**Systems Affected and Related Processes**

It is possible to specify various IT systems and/or institutional processes that may be impacted as a result of a given project. Adding systems and/or processes to a project/request will allow a report to be created showing all projects/requests that impact the system or process. To make systems and/or process available for selection, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Expand the Portfolio Planning and then click on Systems.
3. Click the New button to create a new Systems.

**Organizational Risks and Risk Register**

When creating a project or project request, organizational risks can be added to the request/project by rating the risk as High, Medium, or Low. Leaving the risk value as N/A implies that there is no risk of that particular item. Adding risk to a project or request will impact the scoring calculation, which is further defined in a section of this document. To add risk values, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Expand the Portfolio Planning and then click on Risks.
3. Click New to add a risk.

The Risks Percent of Value indicates the scorecard weighting for the Risks section. Refer to the scoring section of this document for further information.

In addition to recording the organizational risks on a project/request the Risk Register is designated to track risks specific to the project/request. Entries in the Risk Register will not impact the scoring calculation value. Entries can be made to the Risk Register during all phases of the project (request, review, & project). Additionally, existing issues on the project can be associated with Risks in the Risks Register.

Risks can have custom attributes to track information in fields that are not delivered out of the box. To add Risks Custom Attributes, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Expand the Projects/Workspaces and then click on Risks Attributes.
3. Click New to add an attribute.

Risks can have custom statuses if the statuses that are delivered out of the box do not provide the proper named values needed. To add/modify Risk Statuses, follow these steps:

1. Login to TDAadmin and expand the entity name in the left-hand navigator.
2. Expand the Projects/Workspaces and then click on Risk Statuses.
3. Click New or Edit to create/modify a status.
Benefits
The Benefits section of a request or project allows for the definition of both a monetary benefit and intangible benefits that will be gained by delivering the project. The intangible benefits section is simply a text box that can be populated with notes outlining the benefits. The monetary section of Benefits allows for the selection of a benefit type and then fields to specify the financial benefit of doing the project over a 5-year period. For example, a benefit type might be “Revenue Generation”. To create benefit types:

1. Login to TDAdmin and expand the entity name in the left-hand navigator.
2. Expand the Portfolio Planning and then click on Benefits
3. Click the New button to create a new benefit.

Time and Expenses
Time and Expense codes can be added to a project either by navigating to each of these sections, selecting a time or expense account and then clicking “Add”. Or, time and expense accounts can be associated with a project type. When that particular project type is used during project/request creation, the time and expense accounts will automatically associate.

Resources
The Resources section of the project request allows the step evaluators to add functional roles to the project request. Individual people are not added to requests, but rather roles to indicate the type of resource that will be needed in order to deliver the particular request should it be approved and converted to a project. In order for Functional Roles to be added to the request, the roles must first be defined in TDAdmin.

1. Login to TDAdmin and expand the entity name in the left-hand navigator.
2. Expand the Users & Roles section and then click on Functional Roles.
3. Click the New button to name and add a role.

The standard rate and the bill rate represent the billable rate and fully loaded cost or that particular type or resource. Adding a functional role to the project request for a particular set of hours will contribute to the budget of the request by calculating the hours specified, multiplied by the cost rate. This helps the evaluators consider the overall resource cost of executing a particular project.

Each user in TeamDynamix can have one primary functional role (which contributes to capacity planning) and an infinite number of additional roles. To associate a functional role to a user, follow these steps:

1. Login to TDAdmin and expand the entity name in the left-hand navigator.
2. Click on Users & Roles > Users and then a particular user name to open the user edit screen.
3. Click on the Functional Roles tab and then select an available role from the drop down. If the role added is to be the primary role, check the box labeled “Make this role primary”.

TeamDynamix
Stakeholders

Project Requests and Projects include a Stakeholders section which allows the project manager to list additional people as stakeholders. Stakeholders do not need to be users of TeamDynamix, but a customer record must exist in order to be added as a stakeholder. The stakeholder section also includes a RACI (Responsible, Accountable, Consulted, and Informed) check list to indicate how the stakeholder is involved in the project/request.

Adding a stakeholder to a project also places the stakeholder name in the Notification area of the project update screen.

Additionally, adding a stakeholder to a project request allows the stakeholder to view the request as it is moving through the request evaluation process. The stakeholder does not need to be the Requestor or Creator to see the request.

Plans

The plans section of the project request allows the step evaluator to create a framework of the project plan that will be used when the request is approved and converted to a project. Simply clicking the "Edit Plans" button Plans section of the project request window will launch the Plan Manager tool and will enable the evaluator to create tasks associated with the project. This project plan will remain when the request is approved and converted to a project.

The Plans section of a project lists all of the plans currently associated with the project, a summary of the dates, and provides the ability to open the project plan manager.

Plans can be applied to a project in a template form using Project Templates application. Project Templates support both Waterfall and Card Wall plan types. To create a project template, follow these steps:

1. Login to TDNext and open the Project Templates application (user must have Enterprise license type).
2. Click New Project Template, add a Name and select Components needed.
3. Open each Component and add to the template.

To apply a project template, follow these steps:

1. Login to TDNext and open the Project/Workspaces application.
2. Open a project in which you manage.
3. Click Actions, and Apply Project Template.

Milestones

The milestones section lists any task that has been labeled as a milestone in the project plan as well as information about that milestone, such as percentage complete.
SCORING PROJECTS REQUESTS AND PROJECTS

It is common for institutions to score project requests in order to determine the value of the request. Project requests are generally an "Apples-to-Oranges" comparison, making it difficult to decide between requests. Scoring aims to eliminate some of the differences so that requests can be compared more accurately. It is common in the industry to score projects on a 100-point scale. Within TeamDynamix, the Goals, Risks, and Scorecard/Criteria sections make-up the total score. Configuring these sections is describe in the previous section. The following describes how each section contributes to the overall score. Note that as of 10.2, multiple scorecards are now supported.

Goals calculation

The score contributed to the composite score is a function of the number of goals supported by the project (which produces a number between 0-1) multiplied by the Goals PCT of Value multiplier. The max goal score is 1 if project is aligned with all goals. The Goals contribution to the composite score will be calculated by multiplying the goals score (again, a value between 0-1) by the % value multiplier to the score.

The equation to calculate the goals score is as follows:

Goals contribution to the composite score = ((Number of Goals Supported/Total Number of Goals) * % value multiplier)

So as an example, if there are 4 total goals from which to select and a project aligns with 3 of the 4 the goals score will be .75. Furthermore, if the % contribution for goals is set to 3000% in the TDAdmin tool, the calculation becomes 0.75 * 3000% = 22.5 out of a possible 30 points.

Risks calculation

The weight added to the composite score by the project risks is a function of the summed value of all of the risks (between 0 and 1) and the Risks PCT of Value Multiplier. Each risk entered in the system has choices of NA, Low, Medium and High. If there is high risk, 0 points are given and if there is no risk (N/A), 1 point is given. The scoring values of each choice are illustrated below:

N/A = 1
Low = .67
Medium = .33
High = 0

The equation to calculate the risk score is as follows:

\[(\text{Sum of All Selected Choice Weights for All Risks})/(\text{Total Number of Risks}) \times \% \text{ Value Multiplier}\]

So as an example, if there are 5 risks in total and 3 are N/A (each equal to 1 point), 1 risk is High (=0), and 1 risk is Medium (=.33) the un-weighted risk score would be 3.33. Furthermore, if the % contribution for goals is set to 3500% in the TDAdmin tool, the calculation becomes \((3.33/5) \times 3500\% = 23.31\) out of a possible 35 total points.

TeamDynamix
Scorecard Criteria Calculation

The weight added to the scorecard and composite score by an individual scorecard criterion is a function of the value of the criterion (between 0 and 1) and the % PCT of Value Multiplier. The value of the criterion is multiplied by the % Value to determine the total value contributed to the score.

The equation is as follows:

Value Contributed to the Score = (Selected Choice Value / Max Choice Value) * % Score Multiplier

As an example, assume a criterion with a % value of 600% and 5 choices with the following values:

- Choice N/A = 0
- Choice A = 1
- Choice B = 2
- Choice C = 3
- Choice D = 4

If N/A is selected then the value contributed to the scorecard is ((0/4) * 600%) = 0
If A is selected then the value contributed to the scorecard is ((1/4) * 600%) = 1.5
If B is selected then the value contributed to the scorecard is ((2/4) * 600%) = 3
If C is selected then the value contributed to the scorecard is ((3/4) * 600%) = 4.5
If D is selected then the value contributed to the scorecard is ((4/4) * 600%) = 6

Composite Score PCT Value

The Composite Score PCT Value represents the relative position of the request in relation to the total possible score at the time it was scored. For example, if there is a total possible score of 100 points and the project has a score of 50 then the composite score % will be 50%. If at some point in the future the scoring is changed so that the max score is 120 the composite score % helps to clarify that when the project request was originally scored it achieved 50% of the possible points even though with today's model (120 total possible) it would be 42%. It allows for changes to the scoring model yet still evaluate the relative score of projects scored under a different model.
PROJECT REQUEST WORKFLOWS

Project request workflows are used to evaluate project request that are either submitted from the Client Portal or that are directly created within the Portfolio Planning application. A project request will enter a workflow either automatically by associating the requested project type to a workflow or by the Evaluator’s placement of the request into a workflow. Additionally, any Enterprise user that has the permission “Always Assign Requests to Workflows” can assign a request to a workflow.

Creating Project Request Workflows

Project request workflows can be created in TDAdmin. To create a new workflow, follow these steps:

1. Login to TDAdmin and expand the entity name in the left-hand navigator.
2. Expand the Portfolio Planning section of TDAdmin. Within this section, there is a Workflow Template and Workflows section. These two items go hand-in-hand when creating a project request workflow. Please note that project request workflows can also be created within the Workflows section of TDAdmin.
3. First click on Workflow Template. This is where the steps that are to be part of a project request workflow are defined. The steps must be defined before a workflow can be created. Click New Step to create a workflow step. If need be, after the workflow steps have been created, they can be re-ordered by clicking and then dragging/dropping in a new order.
4. Once Workflow steps have been created, click on the Workflows section to create a new workflow that utilizes the steps created in the Workflow Template section.
5. Create a new workflow and then click on the steps tab to begin configuring the workflow rules.
6. By default, each step that was created previously will be inactive in the workflow. If the steps should be included in the workflow, it will need to be activated. Otherwise, the step can remain inactive.

Configuring Project Request Workflow Steps

There are several settings that can be configured for each step in the workflow:

1. Each step can be “Edited” to enable or disable certain actions during that particular step in the workflow. For example, if the “Reject Request” box is not checked, the project request cannot be rejected (overall) during that step.
2. Clicking "Edit" displays the edit screen for each step.

3. The following is an explanation of each configuration area:
   a. Assignments – Represents the person or group that will own the request when it arrives at the particular step in the workflows. The first step in the workflow must always have an assignment.
   b. Assignment Options – If a step has assignment options, the approver of the previous step can choose the next person to receive the project request.
   c. Active – The step is active within the workflow.
   d. Approve Request – Provides the ability to approve the entire request.
   e. Reject Request – Provides the ability to reject the entire request.
   f. Return to Requestor – Provides the ability to send the request back to the requestor without rejecting.
   g. Reject Step – Provides the ability to send the request back to the previous step.
   h. Forward – Allows the person currently responsible for the request to forward it to another Portfolio Planning user for evaluation. Currently, the request can only be forwarded to one person at a time.
   i. Edit – Enables the "Sections" link on the workflow step so that each section can be marked as "Editable" and/or "Required". This gives the creator of the workflow the ability to lock down a section so that it cannot be edited at the step or force the step to be required, meaning the reviewer has to mark it complete in order to approve the step/request.

Enabling Project Request Workflows

To enable a workflow for use, the following settings must be considered:

1. A workflow must be activated in order to be used. To activate a workflow, click the Edit button found on the General section of the workflow in TDAdmin.
2. The one requirement to activating a workflow is that a “Ready for Reporting” step must be selected. Upon completion of the selected step, a project request will begin appearing in the Portfolio Planning Reports: Top Scored Requests, Requests Matrix, and Capacity Planner.

3. In addition to activating the workflow, associated project types can be selected. If a project type is associated with the workflow, the request will automatically enter into the workflow when a request of that type is selected. Otherwise, the evaluator of the request (as indicated by the Evaluator field on the project type definition) must place the request into a workflow. It is important to note that a project request must go through a workflow before it can be approved and converted to a project.

4. Scorecards can be added to a workflow step if they are to be utilized. Now that multiple Scorecards are supported, be sure to add the one relevant to the workflow.

PROJECT EXPENSE ENTRY
TeamDynamix has the ability to associate Expense codes to a project, which aids in determining the overall budget for the project.

Creating Expense Types
Before Expense types can be added to a project, the expense types must first be created TDAadmin.

1. Login TDAadmin and expand the entity name in the left-hand navigator.
2. Expand the Time & Expense section TDAadmin and then click on the Expense Types link.
3. Click the New button to create a new Expense type code.
4. Provide a Name for the Expense, such as “Hardware”
5. All expenses require a “Code” value, which is meant to indicate a billing or budget code. If this does not apply, it is common to simply abbreviate the name of the expense. The code is not visible within the application and it is only used for exporting purposes. The same is true for the General Ledger (GL) Account field.
6. The Rate value should be left as “0” if the expense amount will be entered by the user. It is possible to set a rate (e.g. Mileage) and have that calculated based on quantity.

Adding Expense Codes to Projects
In order for actual expenses to be logged against a project, expense codes first need to be associated with the project. This can be done automatically by associating the expense codes to a project type or by managing the project and adding each expense code.
Associating expenses with a Project Type
From within TDAadmin, expense codes can be associated with a project type. From that point forward when a project is created using that particular project type, the expense codes will automatically be available for use on the project.

Adding an expense to an existing project
To add an expense code to an existing project, manage the project from within the Projects application and select the Expenses section. Any expense codes that are not already associated (either from being added manually or via association with a project type) can be selected and added.

Expense Types and budget contribution
Once an expense type has been added to a project, it can be edited and an estimated amount may be set. This is an estimate of how much money will eventually be allocated to this type of expense. Additionally, when estimated amounts are added to expense codes, the total estimated amount is shown next to the overall project budget.

Adding Actual Expenses to Projects
The logging of actual expenses occurs within the Time & Expense application. When a project team member purchases an item (e.g. Hardware, Software, Travel expenses), he can enter that item against the project and associated expense code using the Time & Expense application. Entering an actual expense will contribute to the overall, actual budget of the project. Comparing the estimated budget and actual expenses is a common project management metric.

Important Notes:

- A project (or ticket) must first be selected and then the Type dropdown menu will display expense codes that are associated with the project.
- The receipt date is meant to indicate the date the item was purchased from the vendor.
- Billable indicates whether or not the expense item should be billed or passed along for payment.
- Reimbursable indicates whether or not the creator of the expense should be reimbursed for the expense.
- Receipt indicates whether or not the creator of the expense has a receipt to accompany the actual expense.

Once expenses have been logged in the Time & Expense application, they are directly added to the project. This is viewable from the project and on many reports.