



Timephase Financials for Cases

This worksheet is a supplement to Kolme University's Timephase Financials for Cases course. In this course, we will integrate Case objects, including Change Requests, Risks and Issues, into Project timephase financials.

Steps we take in this course

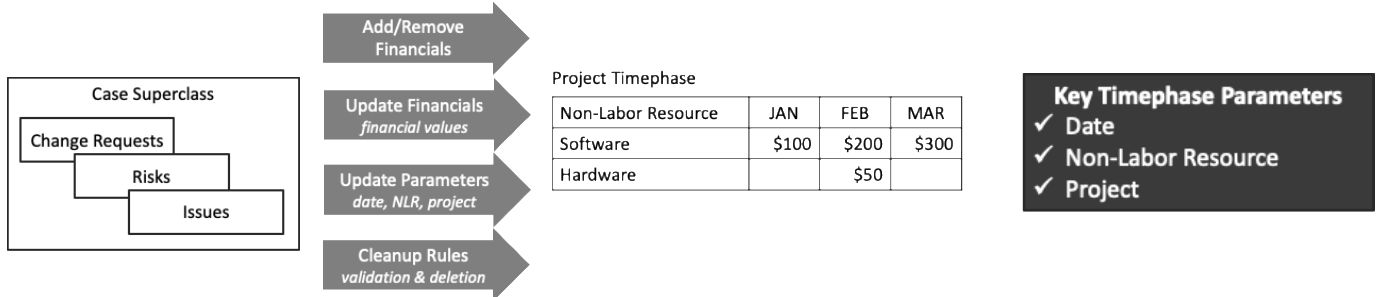
- Configure system settings, fields & views
- Configure a Workflow Rule to add or remove Case financials to Project timephase data
- Configure a Workflow Rule to update Project timephase data when Case financial data is updated
- Configure a Workflow Rule to update Project timephase data when key parameters (date, NLR, related project) are changed on a case
- Configure a Validation Rule to ensure integrity of timephase parameters
- Configure a Workflow Rule to cleanup timephase data when a Case is deleted

Prerequisites

AdaptiveWork Environment

- ✓ AdaptiveWork environment - Sandbox recommended
- ✓ AdaptiveWork administrative access
- ✓ Usage quota allowing for 5 custom fields, 4 workflow rules, 1 validation rule
- ✓ At least a basic understanding of [AdaptiveWork financial planning](#) and timephase financials
- ✓ Advanced AdaptiveWork configuration skills

Solution Taxonomy



Need Help?

Looking to learn more with these or other AdaptiveWork configurations? Check out our additional Kolme University courses and learning paths to gain in-depth knowledge or engage our experts: PPMAnswers@Kolmegroup.com

About Kolme University

Kolme University is the educational branch of Kolme Group, a team of experienced project and portfolio consultants who will help you triumph ahead of schedule.

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Use this section during the “Stop and Reflect” portion of the course to fill in your answers:

Does your organization need to link Cases to Project Timephase Financials? If so, why? Do the Case values need to populate Budgeted Cost or Budgeted Revenue - or some other project timephase value?

➤ _____

“Parts List” of the components you will configure in this course

Configuration	Purpose
System Settings	Enable Financial Planning and Non-Labor Resources, setting 9.5
WFR: Set Case Financial Data	Link / unlink cases to financials based on a case field value
WFR: Update Case Financials on Project	Automatically update project financials when case financial values change
WFR: Update Case Financial Parameters	Automatically update project financials when timephase parameters change
VR: Do not allow Null Financial Parameters	Prevent setting key timephase parameters to null
WFR: Remove Case Financials on Deletion	Remove timephase data when a case with financials is deleted

	Field	Purpose	Definition
Case Object	Planned For (standard field)	Relates the Case to a Project (timephase data is only on the Project)	Standard field - Reference to Work Item
	Financial Impact Date	Date of timephase	Date
	Resource Type	Relate to a Non-Labor Resource Type	Reference to object (NLR)
	Financial Impact State	Selects if we add it to Financials and if it is Modeled or Budgeted	Pick list (None, Modeling, Budgeted)
	Cost	Cost of the item	Currency
	Revenue	Revenue of the item	Currency



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Other tips and tricks...

- On the Set Timephase action, be sure to use *Increment*, not *Replace*
- On the Set Timephase action, \$ExpenseType and \$Billable will auto populate

2.1.1 | Set Financial Timephase Data | Delete

Existing Data Values: Replace Increment

2.1.1 | Set Financial Timephase Data | Delete

Existing Data Values: Replace Increment Formula Options

Financial Period * =

Given Period Fixed Period

From (date) * = SC_Kolme_FinancialImpactDate

To (date) * = SC_Kolme_FinancialImpactDate

\$Non-LaborResource * =
SC_Kolme_CostResourceType

\$WorkItem * =
SPPlannedFor

\$ExpenseType (Optional) = [?]

\$Billable (Optional) = [?]

- As of publication of this course, *you cannot update Budgeted Cost and Budgeted Revenue in the same step*. You need to do these in separate actions. This will likely change in the future, allowing you to do both
- Test. A lot. 😊