



Project Scoring and Prioritization Using Multi-Criteria

This worksheet is a supplement to Kolme University's Project Scoring and Prioritization Using Multi-Criteria. In this course, we are solving the business need of - I need to perform an assessment on new project requests to prioritize them before we start them.

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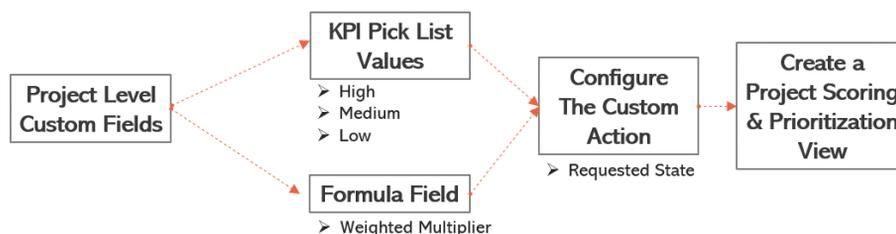
- ❑ Configure custom KPI picklist fields and a formulaic field based on picklist values.
- ❑ Configure a Custom Action to collect KPI values from the user in one easy-to-use form.
- ❑ Test & Confirm the custom action updates the project fields and correctly calculates the project score.
- ❑ Configure a dynamic layout and custom grid view for prioritization.

Prerequisites

AdaptiveWork Environment

- ✓ AdaptiveWork environment - Sandbox recommended
- ✓ AdaptiveWork administrative access
- ✓ Usage quota allowing for eight custom fields and one custom action
- ✓ Sample projects in requested state
- ✓ Basic AdaptiveWork Technical Skills
- ✓ You have completed the AdaptiveWork foundation training.

Configuration Diagram:



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:

What KPI's does your organization measure? How many fields is correct for your organization?

➤ _____

What other areas would be beneficial for you to utilize Dynamic Layouts?

➤ _____

What Business Units within your organization should have access to and be able to be update the Project Scoring custom action?

➤ _____

Does your organization prefer visual indicators to help them consume information better?
Where might you be able to add them?

➤ _____

Where else can you use Conditional Formatting to help users in the system?

➤ _____

