EGKITS SaaS V11

by IDSYSEG · Complete module guide · Version 1.0

Updated Nov 2026

Project Portfolio Complete Module Guide

Projects from the first opportunity to the final close, with cost, price and profit kept apart

Opportunity to close | Margin-safe quoting | Bill and post once

EGKits SaaS V11

A complete reference for project managers, PMO leads, finance controllers, sales teams, administrators and auditors. It explains how Project Portfolio (PPM) plans the work, estimates and approves its cost, prices and quotes it, turns the accepted quotation into a contract, bills milestones and progress through Accounts Receivable, recognizes revenue in the General Ledger and closes the project, while every financial step is approved by a person and posted exactly once.

Field	Value
Document version	1.0
Publication date	23 November 2026
Applies to	EGKits SaaS V11, app code ppm
Audience	Project managers, PMO, finance, sales, administrators and auditors
Distribution	Public. No tenant data, rates, credentials or production logs.
English file	`EGKits_PPM_Project_Portfolio_Guide_EN.pdf`
Arabic file	`EGKits_PPM_Project_Portfolio_Guide_AR.pdf`

Enforced control

Invoices for a project are raised only from the project, never from its sales order, and every labour, billing and revenue journal carries an idempotency key. A retry or a second click can never bill the customer twice or post the same amount twice.

Plan and control

Work breakdown, dependencies, critical path, baselines, Gantt, Kanban, calendar and milestones.

Price with confidence

Approved cost basis, margin or markup scenarios, a margin floor and the Project Quote Studio in Sales.

Bill and recognize once

Contracts, retention, milestone and progress billing, revenue true-ups and daily earned value.

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1. How to read this guide

The guide follows the life of a project: set up the module, take in the demand, plan the work, cost it, price and quote it, contract it, deliver it, bill it, recognize the revenue and close it. Each chapter names the page, the permission and the statuses exactly as the product shows them.

Reader	Start with	Then read
Executive or PMO lead	2. Executive summary	7, 8, 20 and 23
Project manager	8. Project lifecycle	9, 10, 16 to 19
Finance controller	11. Budgets and earned value	10, 13 to 15, 17 and 19
Sales	12. Pricing and quoting	10 and 13
Administrator or auditor	5. Security and permissions	6, 19, 21 and 24

Three kinds of note appear in the text.

Note	Meaning
Enforced control	A rule the server enforces whatever the page or the user does.
Configuration	A value the tenant can change. The default is stated.
Tip	Advice from implementations.

2. Executive summary

Project Portfolio is the EGKits application for organizations that deliver projects for customers or for themselves: engineering and contracting firms, professional and IT services, fit-out and construction teams, and PMOs. One workspace per project carries the plan, the cost, the commercial offer, the contract, the bills, the revenue and the governance log, and one command center shows every project a person may see.

Why finance can trust it

- Cost, price and profit stay apart. Estimates and budgets, pricing and quotations, and profitability have separate permissions and records. Pricing never changes cost, and confidential salary-based rates are hidden from those who may not see them.
- One source of actual amounts. Actual cost and recognized revenue come from posted General Ledger lines tagged with the project.
- Bill once, post once. Invoices come only from the project; labour, billing and revenue journals carry idempotency keys.
- People decide. Estimates, budgets, change requests, timesheets, revenue true-ups and AI drafts wait for a person with the approval permission. AI never prices, quotes or posts.

A project from plan to close

1. The PMO describes new demand; an AI draft with phases is proposed and a person creates the project.
2. The project manager builds the work breakdown, links dependencies and recalculates the critical path.
3. The cost estimate is submitted and approved by finance; the cost basis is frozen and a standard pricing scenario is prepared.

4 Sales prices and quotes the customer in the Project Quote Studio; a discount below the floor waits for approval.

5 The accepted quotation becomes a sales order; the contract is created and the project moves to Execution.

6 The team logs time, completes milestones and bills them; revenue is trued up and the project is closed with lessons learned.

3. Core concepts

These terms are used throughout the module and this guide.

Concept	What it is	Where you see it
Portfolio	A group of projects by strategy, business unit or customer segment, with its own members.	Portfolios & programs
Program	Related projects inside a portfolio that share a goal.	Portfolios & programs
Project	The unit of delivery: customer, project type, contract type, dates, priority, currency, team and stage.	Projects, workspace
Work breakdown	Phases, sub-phases, work packages, activities, tasks and subtasks.	Plan tab
Baseline	A frozen copy of plan dates and costs used to measure variance.	Plan, Gantt
Estimate revision	Versioned cost lines per task and category, submitted and approved.	Cost tab
Costing snapshot	The frozen approved cost basis used by pricing and quotations.	Commercial tab
Pricing scenario	A price built from the cost basis by margin or markup, checked against the margin floor.	Commercial tab
Budget	Original and revised versions; the approved one is the earned value baseline.	Cost tab
Contract	Billing basis, value and retention, with change orders.	Contract & billing tab
Billing event	One bill for a milestone or progress that raises one receivable invoice.	Contract & billing tab
Revenue true-up	The difference between earned and invoiced revenue, posted after approval.	Contract & billing tab
Health score	A 0–100 score with a band: On track, At risk or Critical.	Dashboard, projects

4. Architecture

Project Portfolio is a module of the EGKits platform. Its pages load on demand inside the ERP web app, call the API under /api/v1/ppm, and reuse the platform's Sales, Accounts Receivable, General Ledger, numbering, notification and audit services instead of keeping copies of their data.

Part	Role
Pages	Command center, projects, workspace, boards, portfolios, resources, timesheets, approvals and settings, plus the Project Quote Studio in Sales.
API	/api/v1/ppm with a permission on every endpoint and a project-membership check on every project.
Scheduling engine	Forward and backward passes over the working calendar, float, critical tasks and loop detection.
Commercial engine	Margin and markup pricing against the floor; quote advice in Sales.
Integrations	Quotations and sales orders (Sales), invoices (Accounts Receivable), journals (General Ledger), purchase orders for committed cost.
Background jobs	ppm:rollup every 15 minutes and ppm:sweep daily at 02:00.

Part	Role
AI tools	Ppm.GetDashboard and Ppm.SearchProjects read; Ppm.ProposeProjectDraft only stores a proposal.

Enforced control
Every project record carries its tenant and company. The tenant comes from the signed-in workspace, never from the request, and background jobs run per tenant.

5. Security and permissions

Each area has its own permission resource with the actions View, Search, Create, Update, Delete and Approve. View and Search are basic on most areas; costing, budgets, commercial, contracts and billing are not, so a role must be given them on purpose.

Permission resource	Protects
`PpmDashboard`	The command center and role views.
`PpmPortfolios`	Portfolios and their members.
`PpmPrograms`	Programs.
`PpmProjects`	Projects, workspace, team and stage changes. Manage sees every project and edits Settings.
`PpmSchedule`	Plan, Gantt, Kanban, calendar, milestones and baselines.
`PpmCosting`	Cost estimates; Approve approves revisions.
`PpmBudgets`	Budget versions and the earned value baseline.
`PpmCostConfidential`	Confidential, salary-based rates on estimate lines.
`PpmCommercial`	Costing snapshot, pricing scenarios and the Project Quote Studio.
`PpmContracts`	Contracts and change orders.
`PpmBilling`	Billing, revenue true-ups and profitability.
`PpmResources`	The resource catalog, allocations and load.
`PpmTimesheets`	Logging time; Approve approves the team's weeks.
`PpmRisks`	The risk register.
`PpmIssues`	The issue log.
`PpmChanges`	Change requests.
`PpmAi`	Project intake drafts; Approve applies a draft.

Who sees which project

A person with Manage on projects sees every project of the company. Everyone else sees only the projects they own or manage, the projects where they are an active team member, and the projects of portfolios where they are an active member. The server checks this on every project request, not only in the list.

Enforced control
Workspace tabs appear only for areas the role can view. Health scores leave out cost signals for people who may not see costs, so the score itself never reveals them.

6. Enabling and setting up

First-time setup

1. Platform: enable the ppm app in the tenant's subscription. Project Portfolio appears in the menu and opens the command center at /ppm.
2. Tenant administrator: assign the PPM permissions to roles such as PMO, project manager, finance and sales.
3. Settings: set numbering, currency, margin floor, maximum discount, revenue policy, labour posting and approval rules.
4. General Ledger: check that the PPM posting roles point at the right accounts for each company.
5. Resources: add people, teams, contractors and equipment with their hourly cost.
6. Portfolios: create the strategic groups you report on, then the first project.

Settings

Setting	Default	Effect
Project code prefix	PRJ	Start of every new project code.
Base currency	USD	The company's reporting currency for the portfolio.
Decimal places	2	Rounding of prices, from 0 to 6.
Minimum margin	10%	The margin floor for pricing and quotes.
Maximum discount	15%	A larger discount sends the quotation for approval.
Default revenue policy	Cost to cost	Used when the contract does not imply its own.
Labour cost posting	Off	When on, approved timesheets post to the General Ledger.
Time zone	UTC	Stored with the settings; must be a valid time zone id.

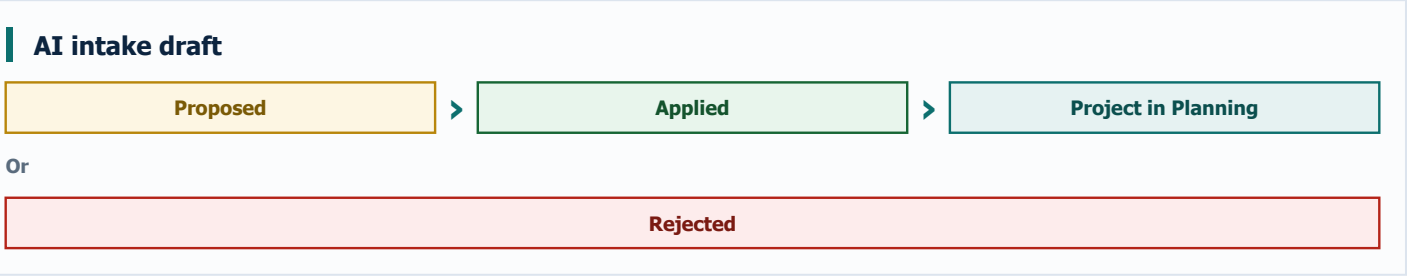
Configuration
Viewing Settings needs access to Project Portfolio; changing them needs Manage on projects. Approval rules decide who approves each subject by amount range.

7. Portfolios, programs and intake

Portfolios & programs is where the PMO organizes demand. A portfolio groups projects for reporting and access; adding a person as a portfolio member lets them see its projects. A program groups related projects inside a portfolio.

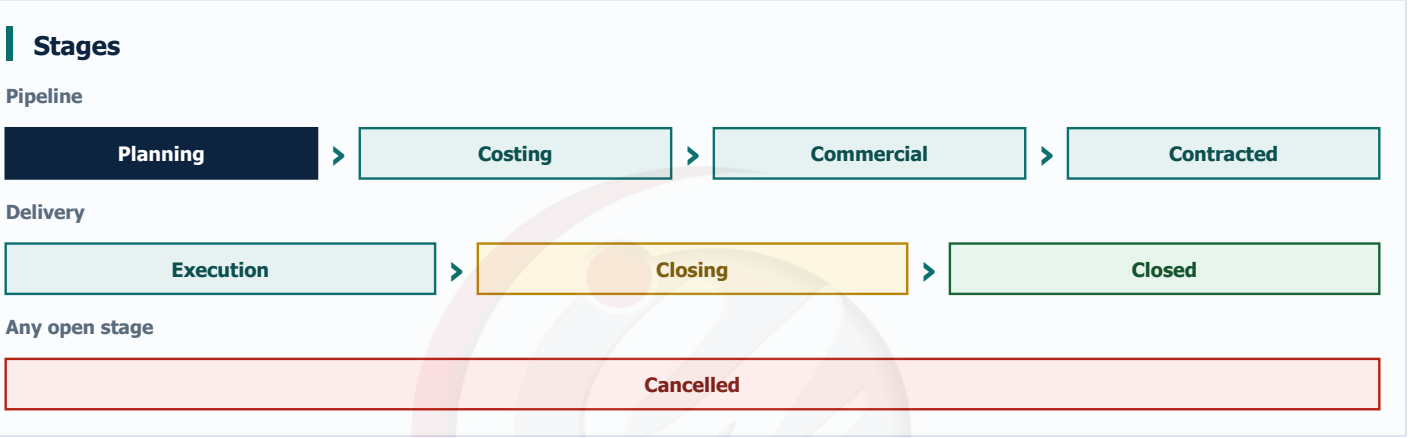
AI-assisted project intake

Describe what the project must deliver. An AI draft with suggested phases is stored as Proposed. Nothing is created until a person with Approve on AI chooses Create project; the new project starts in Planning with the phases in its plan. Rejecting keeps the draft for the record.



8. Project lifecycle

A project has a stage, which says where it is in the pipeline, and a status, which says whether it is moving. The lifecycle stepper at the top of the workspace shows both with the next best step and a button that opens the right tab.



Stage	How the project gets there
Planning	Creating the project or applying an AI draft. Status Draft.
Costing	Adding the first estimate revision.
Commercial	Approving the estimate, or quoting the customer from the Project Quote Studio.
Contracted	Recording a contract by hand.
Execution	Start execution, or converting the project's quotation to a sales order.
Closing / Closed	Begin closing, then Close project.
Cancelled	Cancel project from any open stage.

Stage actions

Action	Enabled when	Result
Start execution	Before Execution, not on hold	Execution, Active; the actual start is recorded. No contract is required.
Put on hold	Open and not on hold	Status OnHold; the stage is kept.
Resume	On hold	Status Active.
Begin closing	Execution	Closing.
Close project	Execution or Closing	Closed, Completed. Blocked while change requests, submitted timesheets or revenue proposals are open.
Cancel project	Any open stage, including on hold	Cancelled.

Action	Enabled when	Result
Reopen project	Closed or Cancelled	Execution if the project ever started, otherwise Planning; status Active.

Enforced control
Automatic stage moves only go forward: a project that is already further along keeps its stage. The first move turns a Draft project Active. Every stage action needs Update on projects.

The stepper also shows Opportunity and Feasibility, the pipeline stages before planning, so the whole journey is visible from the first conversation.

9. Planning and scheduling

The Plan tab holds the work breakdown: phases, sub-phases, work packages, activities, tasks and subtasks, each with duration, planned effort and percent complete. Summary items roll up the dates and progress of their children.

Dependencies and critical path

Link	Meaning
Finish to start	The successor starts after the predecessor finishes. The usual link.
Start to start	The successor starts after the predecessor starts.
Finish to finish	The successor finishes after the predecessor finishes.
Start to finish	The successor finishes after the predecessor starts.

Lag delays the successor; a negative value overlaps the tasks. Recalculate runs forward and backward passes over the working calendar, sets total and free float and flags the critical tasks. A task cannot depend on itself, and a loop is reported instead of being scheduled.

Baselines and milestones

- Capture a baseline when the plan is agreed. Variance compares the working plan with it, and baselines are never overwritten. Converting the quotation to a sales order captures an execution baseline automatically.
- A contractual milestone with a billing amount becomes billable once it is completed, and is billed only once.
- Deliverables carry acceptance criteria so the customer's sign-off is clear.

Boards

Board	What it shows
Gantt	Task bars over time with the critical tasks highlighted.
Kanban	Tasks in Not started, In progress and Done; moving a card updates progress.
Calendar	Task finishes and milestones by month.
Milestones	Each milestone's due date and whether it is planned, overdue or done.

10. Cost estimates

Cost is estimated in revisions on the Cost tab. Each line belongs to a task and a cost category and is quantity × unit cost or hours × rate, plus a contingency amount. Assumptions and exclusions written on the revision travel into pricing and the customer quotation.

Estimate revision

Draft › Submitted › Approved › Superseded

Or, from Submitted

Rejected

Action	Enabled when	Result
New estimate revision	No revision is Draft or Submitted; project not closed or cancelled	Moves the project to Costing.
Add line	Draft	Approved revisions cannot be edited; start a new revision.
Submit	Draft with at least one line	Opens approval requests by the estimate total.
Approve	Submitted	Freezes the costing snapshot, supersedes the earlier approved revision, moves the project to Commercial and prepares the standard pricing scenario.
Reject	Submitted	The note is kept; start a new revision to try again.

Cost categories

Fifteen categories are provided: labour, overtime, consultants, subcontractors, materials, procurement, equipment, rental and depreciation, logistics, travel, software, infrastructure, overhead, contingency and other.

Enforced control
A line marked as a confidential rate shows its rate only to people with View on PpmCostConfidential. Everyone else sees the line total, so salaries never leak through an estimate.

11. Budgets and earned value

A budget is created from an approved estimate revision, one budget per revision. The first is Original and later ones are Revised. Approving a budget makes it the earned value baseline, sets the project's approved budget and supersedes the previous approved budget.

Budget version

Draft › Approved baseline › Superseded

Or, from Draft

Rejected

Earned value

Earned value is measured once a day (UTC date) for every active project, and again whenever cost or progress changes. The approved budget is the budget at completion; until there is one, the estimate total stands in. Planned value is time-phased over the plan, so it moves with the calendar even on days when nothing was booked.

Measure	Meaning
PV, EV, AC	Planned value, earned value and actual cost to date.
BAC	Budget at completion: the approved budget.
CPI	EV ÷ AC. Above 1 means the work done cost less than planned.
SPI	EV ÷ PV. Above 1 means more work was done than planned by today.
EAC	Estimate at completion: BAC ÷ CPI, AC + (BAC − EV), AC plus the remaining work at the current CPI, or a manual figure.
ETC, VAC	Cost still to come, and the variance between BAC and EAC.

Tip
No point appears on the cost vs schedule chart until the project has a cost basis and some measured progress, and today's measurement has run.

12. Pricing and quoting

Pricing always starts from the frozen, approved cost basis. A pricing scenario uses either Margin, which is profit ÷ price, or Markup, which is profit ÷ cost. They are not the same: a 25% markup is only a 20% margin. A scenario below the minimum margin from Settings is flagged.

Enforced control
Approving an estimate prepares a standard scenario at the minimum margin plus 10 points, never below 20% and never above 90%, so the project can be quoted at once.

Project Quote Studio

The studio lives in Sales at /sales/project-quotes and needs View on SalesOpportunities and PpmCommercial. It guides the seller through five steps and creates a draft quotation in Sales that is linked to the project.

Step	What happens
Customer	Choose the customer account.
Project	Choose a quotable project. Projects that are not ready show a track of Estimate cost, Submit, Approve and Price with buttons for the next step.
Pricing	The price ladder shows cost, floor and list price; the discount control shows the live margin and verdict.
Terms	Payment plan from contractual milestones, and the terms text with assumptions and exclusions.
Review	How the quotation will read; it opens in Quotations for sending and approval.

Enforced control
Taxes are calculated after the discount. A discount above the maximum discount, or a price below the margin floor, sends the quotation for discount approval before it can be issued to the customer.

13. Contracts and change orders

Quoting the customer links the quotation to the project, adopts the quoted customer and moves the project to Commercial. When the customer accepts and the quotation is converted to a sales order, the project's contract is created once per quotation.

Quote to contract

Approved cost > Pricing scenario > Quotation > Sales order > Contract > Execution

Contract source	What is set
Quotation converted to a sales order	Milestone billing at the quotation's value net of discounts and before tax. An execution baseline of the plan is captured and the project moves to Execution.
Record contract by hand	Billing basis, value and retention for work agreed outside Sales. The project moves to Contracted.

Billing bases: fixed price, milestone, progress, time and materials, and cost plus. Retention is a percentage withheld from each invoice until the customer releases it.

Change orders

Approving a change request on a contracted project adds a change order to the latest contract and adds the price impact to the contract value. A change can never reduce the contract below what is already billed.

14. Billing

Bills are raised from the Contract & billing tab. Each billing event creates exactly one Accounts Receivable invoice for the project's customer and company, tagged with the project, with retention withheld on the invoice line.

Rule	Detail
Prerequisites	A customer, a company and a contract. Cancelled projects cannot be billed.
Milestones	The milestone must be completed; each milestone is billed once at its billing amount.
Headroom	A bill cannot exceed the contract value left to bill.
Retention	The contract's retention percent is withheld from the invoice line.
Taxes	Milestone invoices carry the taxes quoted to the customer.
Idempotency	Each billing event carries its own key, so a retry returns the same invoice.

Enforced control
The sales order of a project is never invoiced from Sales. Billing always comes from the project, so the customer is billed once for the same scope.

15. Revenue recognition and profitability

Invoices already credit revenue. Revenue recognition therefore posts only the difference between revenue earned under the project's policy and revenue already invoiced. Each contracted project keeps one open true-up proposal, which the nightly job keeps current.

Policy	Earned revenue follows
Cost to cost	The share of the budget spent.
Output	Measured progress.
Milestone	Milestones completed.
Time and materials	Amounts billed.
Straight line	Time elapsed over the planned dates.

Revenue true-up

Earned revenue › **Open proposal** › **Approved**

Posting

Earned above invoiced: Dr unbilled receivable, Cr revenue

Invoiced above earned: Dr revenue, Cr deferred revenue

Posting roles

Role	Default account	Used for
PPM.Wip	1400	Debit for approved labour cost.
PPM.LaborAbsorption	5100	Credit for approved labour cost.
PPM.RevenueRecognized	4000	Revenue true-ups.
PPM.UnbilledReceivable	1300	Earned revenue not yet invoiced.
PPM.DeferredRevenue	2400	Invoiced revenue not yet earned.
PPM.RetentionReceivable	1310	Retention withheld on project invoices.

Configuration

Posting rules are seeded per company when the accounts exist and can be changed in General Ledger posting rules. Recognizing revenue is refused until the revenue, unbilled receivable and deferred revenue roles are mapped.

Profitability

The profitability view shows estimated cost, contract value, actual cost, invoiced amount and expected, actual and forecast profit. It is captured after each bill and revenue posting and by the rollup job, and it never shows employee-level detail.

16. Resources and capacity

The resource catalog lists who and what does the work: employees, teams, contractors, consultants, equipment, machinery, vehicles and other resources, each with skills, a working calendar and an hourly cost. Inactive resources cannot be allocated or log time.

The load heatmap compares booked hours with each resource's working calendar over 2, 4 or 8 weeks.

Load bands

Light: below 60% | **Healthy: 60–90%** | **Full: 90–100%** | **Over-booked: above 100%**

17. Timesheets and labour cost

People log the week on the Timesheets page against project tasks, mark billable and overtime hours and submit. A submitted week is locked until it is approved or rejected with a reason; a rejected week can be logged and submitted again.

Weekly timesheet

Submitted > Approved > Task actuals and journal

Or

Rejected > Submitted again

Rule	Detail
Entries	Each entry is above 0 and at most 24 hours and falls inside the week; a day cannot exceed 24 hours.
One week	A week that is submitted or approved cannot be submitted again.
Cost	Hours × the resource's hourly cost; overtime at 1.5×.
Self-approval	People cannot approve their own week unless they hold Manage on projects.
Posting	With labour posting on, approval posts project WIP against labour absorption, one journal per company, keyed PPM.Timesheet.

Configuration

Labour cost posting is off by default and applies to timesheets approved after it is turned on.

18. Risks, issues and change

Register	How it works
Risks	Probability and impact from 1 to 5 place each risk on the matrix. Exposure is probability × impact; 15 or more is high exposure and lowers the health score. Responses: mitigate, avoid, transfer or accept.
Issues	Low, medium, high or critical, with an owner and a due date. Overdue high and critical issues are escalated by the nightly job and the owner is notified.
Change requests	Schedule days, cost and price impact. Numbered CR and submitted at once.
Decisions	The decision log keeps what was decided, by whom and when.
Lessons learned	Kept with the project so the next team starts wiser.

Change request

Submitted > Approved > Forecast, budget and contract updated

Or

Rejected

Approving a change moves the forecast finish by the schedule days, adds the cost impact to the planned cost and the approved budget, and adds a change order and the price impact to the latest contract. A change is decided once, so its impact is never applied twice.

19. Approvals

The Approvals page is one queue of everything waiting for a decision, oldest first: estimates, budgets, change requests, timesheets and AI drafts. Approval rules in Settings decide who approves each subject by amount range; a rule can require several roles in turn.

Approval request

Record submitted > **Pending** > **Approved**

Or

Rejected with note

Situation	Who approves
An active rule matches the subject and amount	One step per role in the rule.
No rule; estimate, budget or billing	One approval from Finance.
No rule; anything else	One approval from a Manager.

Enforced control
Deciding a record closes all of its pending steps at once, and the decision, the person and the note are written to the audit log.

20. Dashboards and project health

The command center opens at /ppm. Role views at /ppm/dashboard/{role} present the same data for executives, project managers, finance, sales and operations: portfolio health, cost vs schedule (CPI against SPI), budget burn, the watchlist and smart insights.

Health score

Each project starts at 100. Points are taken off, each with a cap, for cost overrun (CPI below 0.95), forecast cost above budget, schedule slip (SPI below 0.95), finish-date slippage, overdue milestones, critical issues, high-exposure risks and progress lagging the elapsed time by more than 15 points. The drivers are listed largest first.

Health bands

On track: 75 and above | **At risk: 50 to 74** | **Critical: below 50**

AI in Project Portfolio

Tool	Kind	What it does
`Ppm.GetDashboard`	Read	Portfolio totals and health for the caller's projects.
`Ppm.SearchProjects`	Read	Finds projects the caller may see.
`Ppm.ProposeProjectDraft`	Low-risk write	Stores a project draft as a proposal; a person applies it.

21. Background jobs

Job	Schedule	What it does
`ppm:rollup`	Every 15 minutes	Rolls up cost per task and project, measures earned value and captures profitability for changed projects.
`ppm:sweep`	Daily at 02:00	Logs overdue milestones, escalates overdue high and critical issues with a notification, queues the daily earned value point for active projects and keeps revenue true-up proposals current.

Configuration

Both jobs run for every active tenant. The queue and the time zone of the schedule come from the PpmJobs configuration section.

22. Page reference

Page	Address	Permission
Command center	`/ppm`	`PpmDashboard`
Role dashboard	`/ppm/dashboard/{role}`	`PpmDashboard`
Projects	`/ppm/projects`	`PpmProjects`
Project workspace	`/ppm/projects/{id}`	PpmProjects and each tab's area
Kanban	`/ppm/projects/{id}/kanban`	`PpmSchedule`
Calendar	`/ppm/projects/{id}/calendar`	`PpmSchedule`
Milestones	`/ppm/projects/{id}/milestones`	`PpmSchedule`
Portfolios & programs	`/ppm/portfolios`	PpmPortfolios, PpmPrograms, PpmAi
Resources	`/ppm/resources`	`PpmResources`
Timesheets	`/ppm/timesheets`	`PpmTimesheets`
Approvals	`/ppm/approvals`	The approval permission of each subject
Settings	`/ppm/settings`	PpmProjects; Manage to change
Project Quote Studio	`/sales/project-quotes`	SalesOpportunities and PpmCommercial

Workspace tabs: Overview, Plan, Gantt, Cost, Commercial, Contract & billing, Team & resources, and Risks & changes. Every page has in-app help (F1) in English and Arabic that explains each dialog field and shows the page's step in the project workflow.

23. Troubleshooting

Symptom	What to do
A workspace tab is missing	The role cannot view that area, for example Cost or Contract & billing.
A project is missing from the list	You are not its owner, manager, team member or portfolio member, and do not hold Manage on projects.
New estimate revision is disabled	Another revision is still open. Submit, approve or reject it first.
A project is not offered in the Quote Studio	Approve its estimate; the standard scenario is created on approval.
The quotation waits for approval	The discount is above the maximum or the price is below the margin floor.

Symptom	What to do
Billing is refused	Add a customer, a company and a contract; complete the milestone; stay within the contract value left to bill.
Revenue cannot be recognized	Map the revenue, unbilled receivable and deferred revenue posting roles for the company.
Close project is blocked	Decide open change requests, submitted timesheets and revenue proposals first.
Labour cost does not reach the ledger	Turn on labour cost posting in Settings; it applies from then on.

24. Go-live checklist

- The ppm app is enabled for the tenant and the menu shows Project Portfolio.
- Roles hold the PPM permissions they need; cost, commercial, contracts and billing are granted on purpose.
- Settings: prefix, currency, decimals, minimum margin, maximum discount, revenue policy and labour posting are agreed with finance.
- Approval rules cover estimates, budgets, change requests and timesheets by amount.
- The six PPM posting roles point at the right accounts for every company.
- Resources have hourly costs and working calendars.
- A pilot project has gone from estimate to quotation, contract, bill and revenue true-up in a test company.

25. Glossary

Term	Meaning
AC	Actual cost of the work done.
BAC	Budget at completion.
CPI / SPI	Cost and schedule performance indexes.
Critical path	The chain of tasks with no float; any delay moves the finish.
EAC / ETC / VAC	Estimate at completion, estimate to complete and variance at completion.
EV / PV	Earned value and planned value.
Float	How long a task can slip without moving its successor (free) or the finish (total).
Margin / markup	Profit ÷ price / profit ÷ cost.
Retention	Part of each invoice withheld until the customer releases it.
WIP	Work in progress: project cost not yet released to cost of sales.