

HP Project and Portfolio Management Center

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Operational Reporting User's Guide

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Chapter 1: Introduction

- ["Welcome to PPM Operational Reporting" below](#)
- ["Audience for this Document" below](#)
- ["Related Documents" on the next page](#)
- ["Operational Reporting Content on HP Live Network" on page 10](#)

Welcome to PPM Operational Reporting

Operational Reporting for Project and Portfolio Management Center (PPM Center) enables you to provide rich, interactive reports on PPM Center data. You can use it to distribute weekly reports, provide customers with personalized service offerings, or to integrate business-critical information into corporate portals.

This document provides details about how to use BusinessObjects' web desktop tool InfoView to generate operational reports on Project Management, Resource Management, HP Time Management, and Financial Management data. The chapters include descriptions of the preconfigured operational reports that HP supplies with the solution and instructions on how to run them, cover some of the ad hoc reports that you can create for PPM Center data, and provide detailed examples of how to create the Web Intelligence documents and construct queries for ad hoc reports.

PPM Center version 9.30 provides Excel version of the above reports that HP supplies with Operational Reporting. This document details on how to use these Excel reports from within PPM Center without using BusinessObject.

Note: New development of PPM Center reports will continue to expand on this new Operational Reporting platform.

Audience for this Document

This document is written for PPM Center users, particularly users who act as direct managers, resource managers, and project managers. Readers are assumed to be familiar with the functionality of all PPM Center products and with SAP BusinessObjects.

Related Documents

This section lists the HP and SAP BusinessObjects documents that contain useful information for Operational Reporting users. HP provides the relevant SAP BusinessObjects guides in PDF format on the HP Operational Reporting software CD. For information about how to obtain the HP documents listed, see "[Accessing PPM Center Documentation](#)" below.

The following HP documents provide useful information for Operational Reporting users:

- *Release Notes*
- *Operational Reporting Administrator's Guide*
- *Data Model Guide*(provides details about the internal structure of the data models for both PPM Center and Operational Reporting)
- *Reports Guide and Reference*
- *Project Management User's Guide*
- *Financial Management User's Guide*
- *Resource Management User's Guide*
- *Time Management User's Guide*
- *HP-Supplied Entities Guide*(includes descriptions of all portlets, request types, and workflows in PPM Center)

For detailed information about SAP BusinessObjects Enterprise, see your SAP documentation.

Accessing PPM Center Documentation

To obtain all of the HPPPM Center documentation, go to the HP Software Product Manuals Web site (<https://softwaresupport.hp.com>). To access this Web site, you must first set up an HP Passport account.

Operational Reporting Content on HP Live Network

HP Live Network (HPLN) is an online virtual community for product experts, partners, and customers to collaborate and share knowledge, best practices, and add-on content for HP software products, including PPM Center and Operational Reporting. You can log in to the Operational Reporting community page on HPLN to access the latest news, updates, and documentation for Operational Reporting. You can browse from the Operational Reporting community page or subscribe to receive notifications via email.

Accessing to Operational Reporting Content on HPLN

Access to HPLN is free to all PPM Center customers. You must have an HP passport account to access the PPM Center and Operational Reporting community pages.

You can visit the following web site to access to the Operational Reporting Content:

<https://hpln.hp.com/group/operational-reports-content-project-and-portfolio-management>

Note: Only project owners and administrators can post to the Announcements forum. If you are not a project owner or administrator, direct your feedback to the project owner or the general discussion forum.

- To obtain the latest news and updates of Operational Reporting, go to the **Overview** or **Announcements** tab.
- To download the Operational Reporting bundles and documents, go to the **Downloads** tab.
- To launch discussion about the use of Operational Reporting, go to the **Forums** tab.
- To subscribe to email notifications about Operational Reporting, click **Subscribe** in the **Overview**, **Announcements**, or **Downloads** tab, and then select what you want to subscribe.

Chapter 2: Using Excel Reports for Operational Reporting

This chapter provides instructions on how to use the Excel version of the reports that HP supplies with Operational Reporting from PPM Center without using BusinessObjects.

The HP-supplied Excel reports include:

- Demand VS Capacity report
- Project Status List report
- Financial Summary report
- Time Sheet Compliance report
- ETL Job History report

Software Requirements

You should meet the following requirements to use HP-supplied Excel reports:

- PPM Center version 9.30

For instructions about installing PPM Center version 9.30, see *Installation and Administration Guide*.

For instructions about upgrading to PPM Center version 9.30, see *Upgrade Guide*.

- Operational Reporting Content Pack 2.0

For information about installing or upgrading to Operational Reporting Content Pack 2.0, see *Operational Reporting Administrator's Guide* for Content Pack 2.0.

- Microsoft Excel® 2007-2013

Configuring to Use Excel Reports on PPM Center

To use the Excel reports for Operational Reporting from PPM Center, you should add the following server configuration parameters into the `server.conf` file. For information about editing the `server.conf` file, see *Installation and Administration Guide*.

| Parameter Name | Description |
|-----------------------|---|
| REPORTING_JDBC_URL | Locator for the database that contains the Operational Reporting database schema. |
| REPORTING_DB_USERNAME | Username for the Operational Reporting database schema. |
| REPORTING_DB_PASSWORD | Password for the Operational Reporting database schema. |

Note: You can encrypt the Operational Reporting database password as you do for PPM database password. For more information about encrypting passwords, see *Installation and Administration Guide*.

Running Excel Reports

You can run Excel reports for Operational Reporting as you run other PPM Center reports from the PPM Center standard interface.

For information about how to run reports, see *Reports Guide and Reference*.

Demand VS Capacity Report

This report lists resource demand for specified resource pools as well as allocation and available capacity of each resource pool.

Report Parameters Restore Default

| | | | | | |
|--------------------|----------------------|--|--------------------|----------------------|--|
| *Begin Period: | <input type="text"/> | | *End Period: | <input type="text"/> | |
| *Primary Grouping: | Role | | *Time Granularity: | Month | |
| *Time Unit: | FTE | | Resource Pool: | <input type="text"/> | |
| Region: | <input type="text"/> | | Role: | <input type="text"/> | |
| Resource Category: | <input type="text"/> | | | | |

For descriptions of these parameters, see the table in ["Running the Demand Vs Capacity Report"](#) on page 60.

Project Status List Report

This report displays a list of projects with detailed status information.

Report Parameters Restore Default

| | | | | | |
|--------------------|----------------------|--|------------------|----------------------|--|
| *Primary Grouping: | Program | | Project Name: | <input type="text"/> | |
| Overall Health: | <input type="text"/> | | Project Manager: | <input type="text"/> | |
| Region Name: | <input type="text"/> | | Request Type: | <input type="text"/> | |
| Project Type: | <input type="text"/> | | Business Unit: | <input type="text"/> | |
| Project Class: | <input type="text"/> | | Project Status: | <input type="text"/> | |
| Program Name: | <input type="text"/> | | | | |

For descriptions of the parameters of this report, see the table in ["Running the Project Status List Report"](#) on page 19.

Financial Summary Report

This report compares current, forecast and approved financial information for a specified period.

Report Parameters Restore Default

| | | | | | |
|--------------------------|----------------------|--|-------------------------|----------------------|--|
| *Begin Period: | <input type="text"/> | | *End Period: | <input type="text"/> | |
| *Multiply Factor: | 1 | | *Report Currency: | Local | |
| Business Objective Name: | <input type="text"/> | | Business Unit: | <input type="text"/> | |
| Financial Summary Name: | <input type="text"/> | | Financial Summary Type: | <input type="text"/> | |
| Region Name: | <input type="text"/> | | | | |

For descriptions of the parameters of this reports, see the table in ["Running the Financial Summary Report" on page 105.](#)

Time Sheet Compliance Report

This report shows time sheet submission and approval compliance for resource pools and org units with specified period.


Report Parameters Restore Default

| | | |
|----------------------------------|----------------------|--|
| *Period Range Beginning Date | <input type="text"/> | |
| *Period Range Ending Date | <input type="text"/> | |
| Time Sheet Line Status(es) | <input type="text"/> | |
| Time Sheet Status(es) | <input type="text"/> | |
| *Tolerance for Approval (days) | <input type="text"/> | |
| *Tolerance for Submission (days) | <input type="text"/> | |
| *Top Org Unit | <input type="text"/> | |
| Request Type Name(s) | <input type="text"/> | |
| Project Name(s) | <input type="text"/> | |
| Location Code(s) | <input type="text"/> | |
| Resource Category | <input type="text"/> | |
| Department(s) | <input type="text"/> | |
| Company(s) | <input type="text"/> | |
| Charge Code Name(s) | <input type="text"/> | |


For descriptions of the parameters of this reports, see ["Table 5-1. Prompts for the Time Sheet Compliance Report query" on page 85](#)


ETL Job History Report

This report displays detailed ETL history information


 Report Parameters
[Restore Default](#)

Enter value(s) for Batch Id:

Enter Job Start Date: 

Enter value(s) for Status: 

Enter value(s) for Etl Name:

Enter Job End Date: 

The parameters of this reports are described as follows:

| Field Name | Description |
|------------------------------|--|
| Enter value(s) for Batch Id: | Batch ID to filter on ETL job history |
| Enter value(s) for Etl Name: | Searches for ETL job history of specified ETL job name |
| Enter Job Start Date | Searches for ETL job history which starts after the specified date |
| Enter Job End Date | Searches for ETL job history which ends before the specified date |
| Enter value(s) for Status | Searches for ETL job history with the specified statuses |

Chapter 3: Using BusinessObjects for Operational Reports

This chapter provides instructions on how to use BusinessObjects' web desktop tool InfoView to run reports that HP supplies with Operational Reporting and how to create ad hoc operational reports.

These HP-supplied reports include:

- Project Status List report for Project Management data

The Project Status List report includes the following linked reports:

- Project Status Detail report
 - Project Issues report
 - Project Risks report
 - Project Scope Changes report
- Demand Vs Capacity report, for Resource Management data
 - Time Sheet Compliance report, for HP Time Management data
 - Financial Summary report, for Financial Management data

You can use these HP-supplied reports to quickly run a report query that generates clear data that are easy to interpret, even if you have limited knowledge of BusinessObjects and InfoView. Each of these preconfigured reports is a Web Intelligence document that you can view and work with using BusinessObjects' Web desktop InfoView.

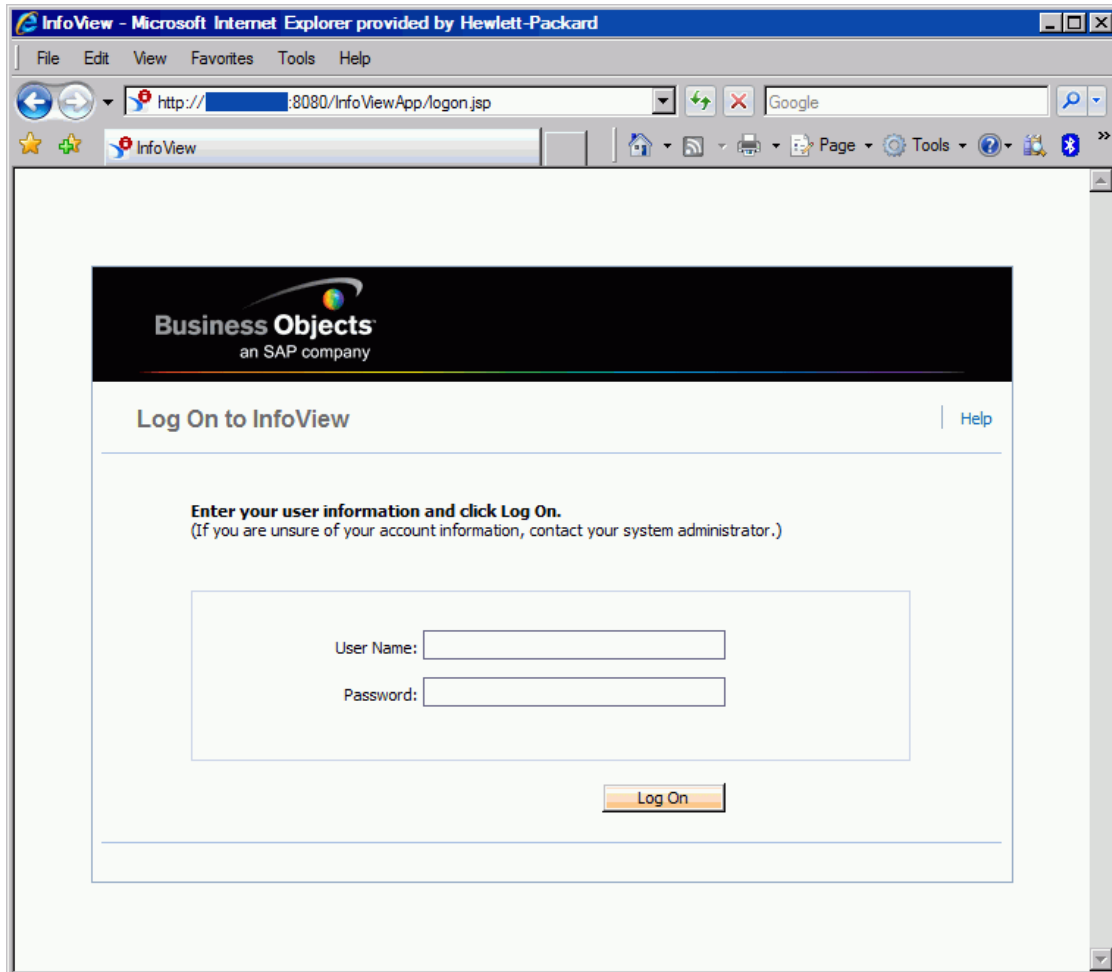
Each of the HP-supplied reports has an associated set of prompts that you can use as configured or modify to filter your data differently. These reports are designed for typical use-case scenarios and are described fully in later chapters.

Logging On to BusinessObjects InfoView

To log on to BusinessObjects InfoView:

1. Go to the InfoView URL that your reporting administrator provides. The URL

`http://<BusinessObjects_Server_Name_or_IP>:8080/InfoViewApp/logon.jsp`



2. In the **User Name** box, type the user name provided by your reporting administrator.
3. In the **Password** box, type the password provided by your reporting administrator.
4. Click **Log On**.

Setting the Locale for Multilingual Operational Reporting

If your organization has multilingual Operational Reporting enabled and you are viewing non-English instances of InfoView, then you must configure InfoView to display numeric values and dates in your operational reports correctly for your locale.

To make sure that numeric values and dates are correctly displayed for your locale, do the following:

1. Open a web browser window and log on to InfoView.
2. Click **Preferences**.
3. In the **General** section of the Preferences page, scroll down and, from the **Preferred Viewing Locale** list, select a locale.
4. Click **OK**.

When you start viewing operational reports in InfoView, dates and numeric values are displayed correctly.

Reporting on Project Management

- ["About this Chapter" below](#)
- ["Project Status List Report" on the next page](#)
- ["Ad Hoc Reports for Project Management" on page 35](#)

About this Chapter

This chapter covers Operational Reporting for Project Management. It provides information about the preconfigured Project Status report, which HP supplies, and some of the many the ad hoc reports that you can create for your Project Management data.

Note: If you organization has multilingual Operational Reporting enabled, make sure that you configure InfoView to display your operational report data correctly for your locale. For instructions,

see ["Using BusinessObjects for Operational Reports" on page 16.](#)

Project Status List Report

The Project Status List report that HP supplies with Operational Reporting is designed to help you review and manage all of your PPM Center projects. This report can include various project header attributes, such as project health, region, project type and percent complete, as well as effort and cost fact information at the project level, as captured in the workplans assigned to projects. To view additional information about a particular project, you can drill down on specific report results to see underlying details such as project health, major milestones, issues, risks, and scope changes.

Grouping Report Data

You can group project information presented in the report based on region, project class, project type, business unit, or program.

Table 3-1. Data display in the Project Status List report based on grouping

| Selected Grouping | Data Displayed |
|-------------------|--|
| Region | Regions associated with projects |
| Project Class | Class to which projects belong. For example, projects that belong to the Core ("Keep the Lights On") project class serve to maintain existing business applications and services. |
| Project Type | Entity that determines the business rules used to manage a project. Project types include policies for different aspects of managing the project, including: <ul style="list-style-type: none">• What types of actuals are collected• Whether built-in project costing or HP Time Management is used for the project• Whether the project includes a work plan |
| Business Unit | Business unit responsible for the project |
| Program | Programs associated with projects |

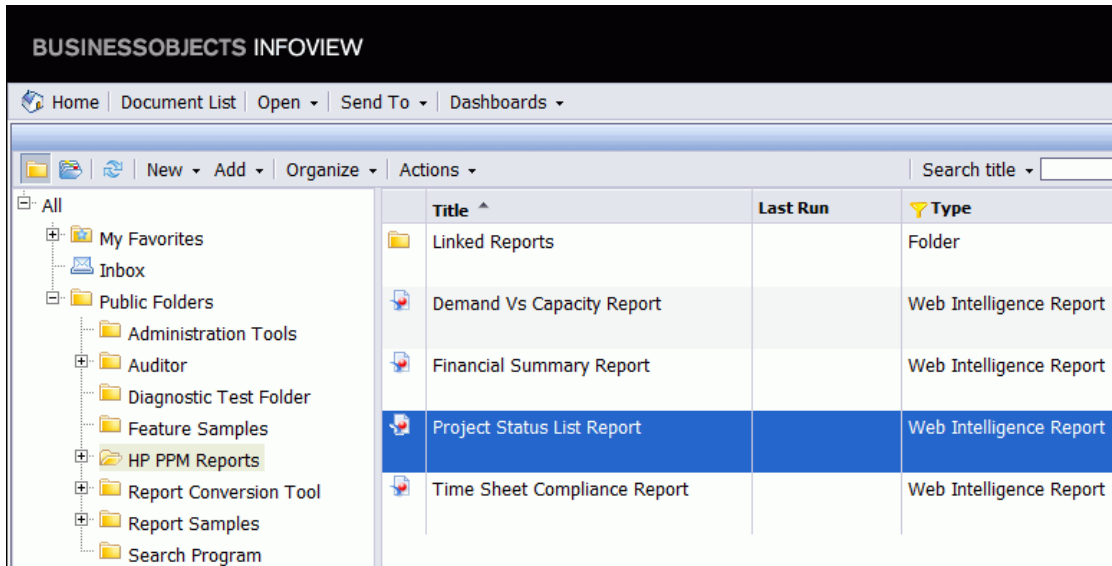
Running the Project Status List Report

To run the Project Status List Report:

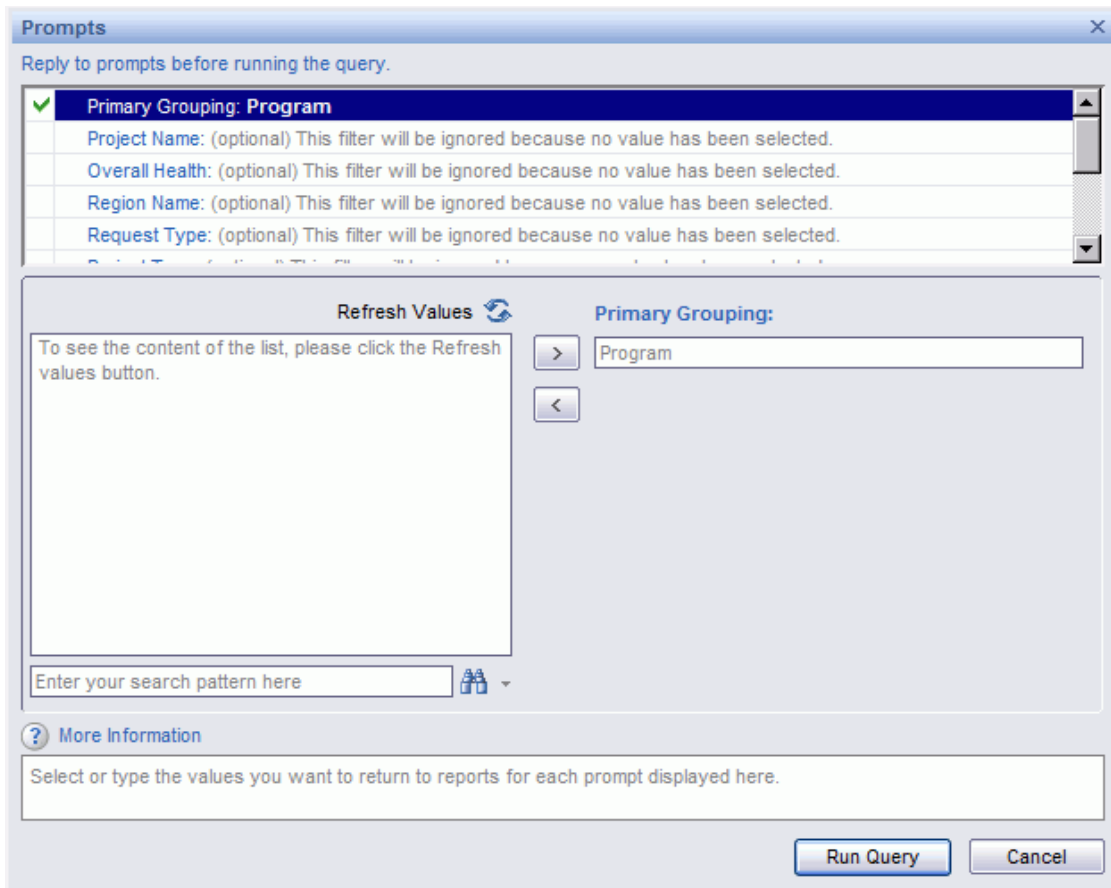
1. Log on to InfoView and open the Document List.

Note: The folders and objects visible in the document list vary, depending on the account you logged on to, the rights that your BusinessObjects Enterprise administrator granted to you, and the settings that you and your administrator enable.

2. In the Tree panel, expand the **Public Folders** folder, and then select **HP PPM Reports**.



3. In the **Title** section, double-click **Project Status List Report**.



The Prompts dialog box lists the filters that are available for the report query. All filters for which values are required have default values, but you can change these values, and specify values for any or all of the optional filters listed.

Note: A green check mark (✓) to the left of a prompt indicates that a value (or values) is specified for the prompt. A red arrow (→) to the left of a prompt indicates that the filter is required and you must specify a value for it before you can run the report query.

4. Run the query as it is or, to filter the data further, before you run the report, provide information for the prompts listed and described in the following table.

Note: If you do not specify a value for a prompt, the prompt is not used to filter report data.

| Prompt | |
|-------------------|--|
| * Required | Description |
| *Primary Grouping | Primary grouping for project information in the report results Selections include: <ul style="list-style-type: none"> ○ Region ○ Projects Class ○ Project Type ○ Business Unit ○ Program |
| Project Name | Name of the PPM Center project |
| Overall Health | Weighted average of the health indicators for scheduling, cost and earned value health, and issue health for a project |
| Region Name | Name of the region with which the project is associated |
| Request Type | Project control request type associated with the project. This can be a project issue, risk, or scope change. |
| Project Type | Entity that determines the business rules used to manage a project. Project types include policies for different aspects of managing the project, including: <ul style="list-style-type: none"> ○ What types of actuals are collected ○ Whether built-in project costing or HP Time Management is used for the project ○ Whether the project includes a work plan |
| Business Unit | Business unit responsible for the project |
| Project Class | Indicates the class to which the project belongs. For example, projects that belong to the Core (Keep the Lights On) project class serve to maintain existing business applications and services. |
| Project Status | Status of the project in its assigned process |

| | |
|-------------------|--|
| Prompt | |
| * Required | Description |
| Program Name | Name of the program with which the project is associated |
| Project Manager | Name of the manager assigned to the project |


5. After you finish specifying data filters, run the query.

Web Intelligence retrieves the data for the default values and returns the report results.

Project Status List Report Results

"Figure 3-1. Project Status List Report results" below shows the results of the Project Status List report.

Figure 3-1. Project Status List Report results

| Project Status List Report  | | | | | | | | | | | | | |
|--|-----------------------|-----------------------------|--------------------------|-----------------------------|---------|----------|-------|------|-------------------|--------------------|----------------------|-----------------------|--------------|
| Program | Project No. | Project Name | Project Manager | Status | Health | | | | Actual Start Date | Actual Finish Date | Planned Start Period | Planned Finish Period | D |
| | | | | | Overall | Schedule | Issue | Cost | | | | | |
| Black Diamond Initiative | 30140 | APO - Pilot | Joseph Banks | Construct | ■ | ■ | □ | ■ | 10/02/2008 | | October 2008 | January 2009 | APO - Pilot |
| | 30120 | CRM One World | Admin User, Joseph Banks | Detailed Project Definition | □ | | □ | □ | | | July 2009 | March 2010 | CRM One V |
| | 31260 | Marketing WebPortal V2 | Joseph Banks | Construct | ■ | □ | □ | ■ | 12/01/2008 | | December 2008 | September 2009 | Marketing V |
| | 30100 | Web for One World | Joseph Banks | Detailed Project Definition | □ | □ | □ | ■ | 01/01/2008 | | January 2009 | September 2009 | Web for On |
| One World | 30140 | APO - Pilot | Joseph Banks | Construct | ■ | ■ | □ | ■ | 10/02/2008 | | October 2008 | January 2009 | APO - Pilot |
| | 30160 | Billing Systems Integration | Joseph Banks | Detailed Project Definition | ■ | ■ | □ | ■ | 01/02/2009 | | January 2009 | September 2009 | Billing Syst |
| | 30120 | CRM One World | Admin User, Joseph Banks | Detailed Project Definition | □ | | □ | □ | | | July 2009 | March 2010 | CRM One V |
| | 30100 | Web for One World | Joseph Banks | Detailed Project Definition | □ | □ | □ | ■ | 01/01/2008 | | January 2009 | September 2009 | Web for On |
| | 30220 | Distribution Access | Nicole Smith | Assign Project Manager | □ | | □ | □ | | | January 2009 | June 2009 | Distribution |

"Table 3-2. Columns displayed in the Project Status List report" below lists descriptions of the columns displayed in the Project Status List report.

Table 3-2. Columns displayed in the Project Status List report

| Column | Description |
|-------------|---|
| <Grouping> | Primary grouping selected for report data. You can group all report data by Region, Project Class, Project Type, Business Unit, or Program. |
| Project No. | PPM Center-assigned number that uniquely identifies the project |

Table 3-2. Columns displayed in the Project Status List report, continued

| Column | Description |
|---|---|
| Project Name | Project name |
| Project Manager | Resource assigned to manage the project |
| Status | Status of the project in its assigned process |
| Health <ul style="list-style-type: none"> • Overall • Schedule • Issue • Cost | Color codes that indicate whether an aspect of the project (schedule or cost, for example) is in a critical state (red), at risk (yellow), or just where it should be, as planned (green). |
| Actual Start Date | Calendar date on which project work actually started |
| Actual Finish Date | Calendar date on which project work actually finished |
| Planned Start Period | Calendar period during which project work is scheduled to start |
| Planned Finish Period | Calendar period during which project work is scheduled to finish |
| Description | Project description |
| Request Type | Type of request used to initiate the project |
| Business Unit | Business unit responsible for the project |
| Business Objective Name | Business objective associated with the project |
| Project Class | Class to which the project belongs. For example, projects that belong to the Core (Keep the Lights On) project class serve to maintain existing business applications and services. |
| Project Type | Project type |
| Region | Region associated with the project |
| SPI | Schedule performance index. Refers to the schedule efficiency ratio of earned value to planned value. SPI describes what portion of the work plan or planned schedule has been accomplished in terms of its cost. |
| CPI | Cost performance index. Refers to the cost efficiency ratio of earned value to actual cost. CPI is used to calculate the projected actual cost for a project and predict the size of possible cost overrun. |

Table 3-2. Columns displayed in the Project Status List report, continued

| Column | Description |
|---|---|
| Capital <ul style="list-style-type: none"> • Labor • Non-Labor • Total | Capital cost of the project |
| Operating <ul style="list-style-type: none"> • Labor • Non-Labor • Total | Operating cost of the project |
| % Complete | Percent of the project work completed to date |

Project Status Details Report

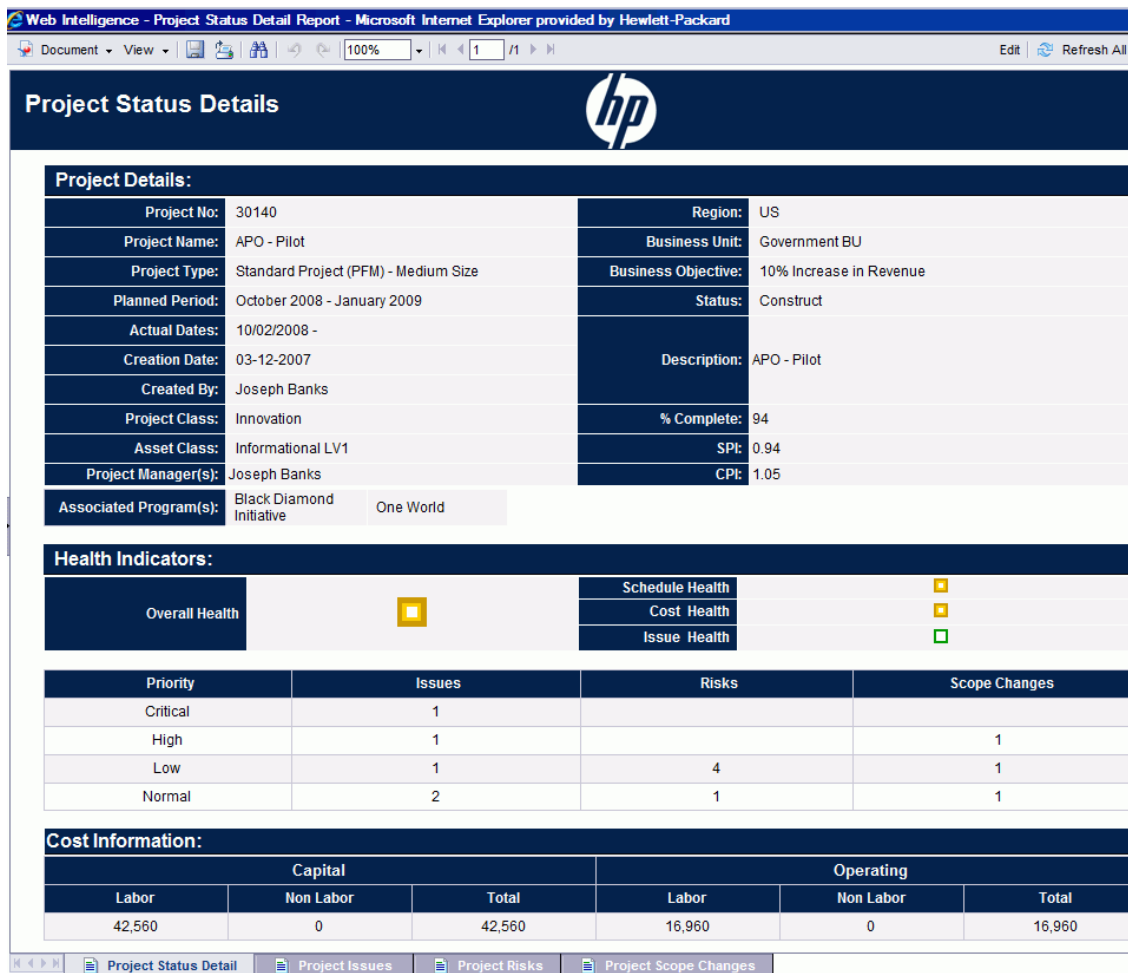
To view the detailed data that underlie the information shown for a project listed in the Project Status List Report:

- In the **Project No.** column of the Project Status List Report, click the link for a project for which you want to see more detailed data.

Project Status List Report

| Program | Project No. | Project Name | Project Manager | Status | He | |
|--------------------------|-----------------------|------------------------|--------------------------|-----------------------------|---------------------------------------|---------------------------------------|
| | | | | | Overall | Schedule |
| Black Diamond Initiative | 30140 | APO - Pilot | Joseph Banks | Construct | ■ | ■ |
| | 30120 | CRM One World | Admin User, Joseph Banks | Detailed Project Definition | ■ | |
| | 31260 | Marketing WebPortal V2 | Joseph Banks | Construct | ■ | ■ |
| | 30100 | Web for One World | Joseph Banks | Detailed Project Definition | ■ | ■ |

The Project Status Details Report opens in a new browser window.



"Table 3-3. Fields displayed in the Project Status Details report" below lists the fields displayed in the Project Status Details report.

Table 3-3. Fields displayed in the Project Status Details report

| Field | Description |
|------------------------|--|
| Project Details | |
| Project No. | PPM Center-assigned number that uniquely identifies the project |
| Project Name | Project name |
| Project Type | Project type |
| Planned Period | Fiscal calendar period during which project work is scheduled to be active |

Table 3-3. Fields displayed in the Project Status Details report, continued

| Field | Description |
|--|---|
| Actual Dates | Calendar date (mm/dd/yyyy) on which project work actually started and, if the project is completed, the date on which it was completed |
| Creation Date | Calendar date (mm/dd/yyyy) on which the project was created |
| Created by | Name of the resource who created the project |
| Project Class | Class to which the project belongs. For example, projects that belong to the Core (Keep the Lights On) project class serve to maintain existing business applications and services. |
| Asset Class | Asset class to which the project belongs |
| Project Manager(s) | Resource(s) assigned to manage the project |
| Associated Programs | Programs with which the project is associated |
| Region | Region associated with the project |
| Business Unit | Business unit to which the project belongs |
| Business Objective | Business objective associated with the project |
| Status | Status of the project in its assigned process |
| Description | Project description |
| % Complete | Percent of the project work completed to date |
| SPI | Schedule performance index. Refers to the schedule efficiency ratio of earned value to planned value. SPI describes what portion of the work plan or planned schedule has been accomplished in terms of its cost. |
| CPI | Cost performance index. Refers to the cost efficiency ratio of earned value to actual cost. CPI is used to calculate the projected actual cost for a project and predict the size of possible cost overrun. |
| Health Indicators | |
| Health <ul style="list-style-type: none"> • Overall Health • Schedule Health • Issue Health | Color codes that indicate whether an aspect of the project (schedule or cost, for example) is in a critical state (red), at risk (yellow), or just where it should be, as planned (green) |

Table 3-3. Fields displayed in the Project Status Details report, continued

| Field | Description |
|---|---|
| <ul style="list-style-type: none"> • Cost Health | |
| Priority | Priority assigned to the project, if any |
| Issues | Number of issue requests submitted against the project. If any issues are associated with the project, then the details for these requests are provided on the Project Issues tab. For information about the Project Issues tab, see "Project Issues Tab" on the next page. |
| Risks | Number of risk requests submitted against the project. If any risks are associated with the selected project, then the details for these are provided on the Project Risks tab. For information about the Project Risks tab, see "Project Risks Tab" on page 31. |
| Scope Changes | Number of scope change requests submitted against the project. If any scope changes are associated with the project, then the details for these are provided on the Project Scope Changes tab. For information about the Project Scope Changes tab, see "Project Scope Changes Tab" on page 33. |
| Cost Information | |
| Capital <ul style="list-style-type: none"> • Labor • Non-Labor • Total | Capital cost of the project |
| Operating <ul style="list-style-type: none"> • Labor • Non-Labor • Total | Operating cost of the project |
| Workplan Milestones | |
| Milestone | Names of standard milestones in the workplan assigned to the project |
| Major Milestone | Names of milestones identified as a major milestones in the workplan assigned to the project |

Table 3-3. Fields displayed in the Project Status Details report, continued

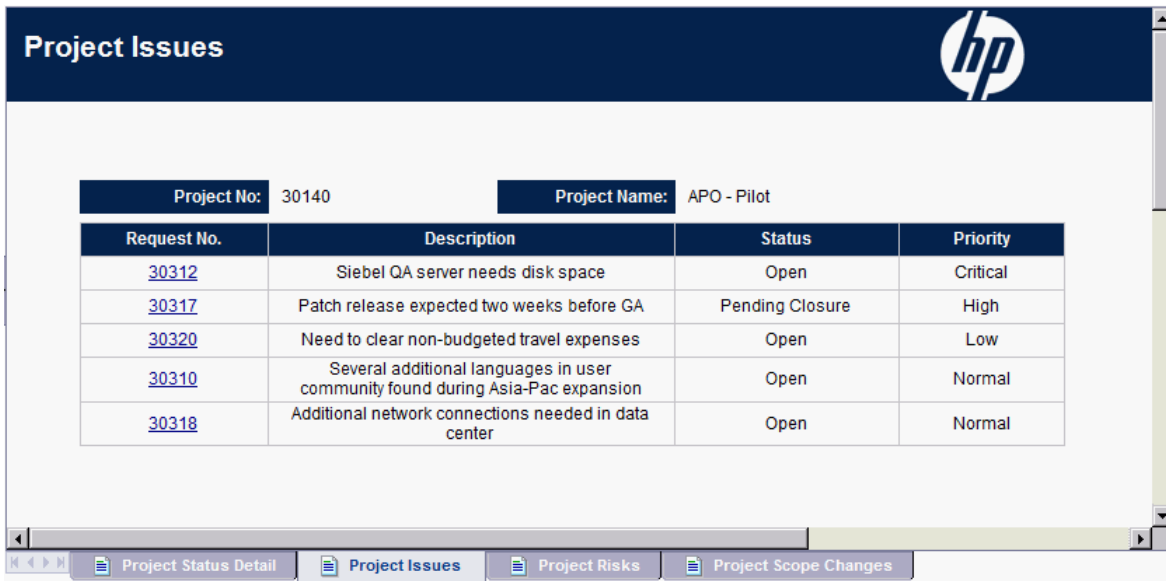
| Field | Description |
|----------------|---|
| % Complete | Percent of the project work completed toward reaching the milestone |
| Estimated Date | Date on which the project is expected to complete the milestone |

If any issues, risks, or scope changes requests are associated with the selected project, then the details for these requests are provided on the **Project Issues**, **Project Risks** and **Project Scope Changes** tab. These tabs are described in the following sections.

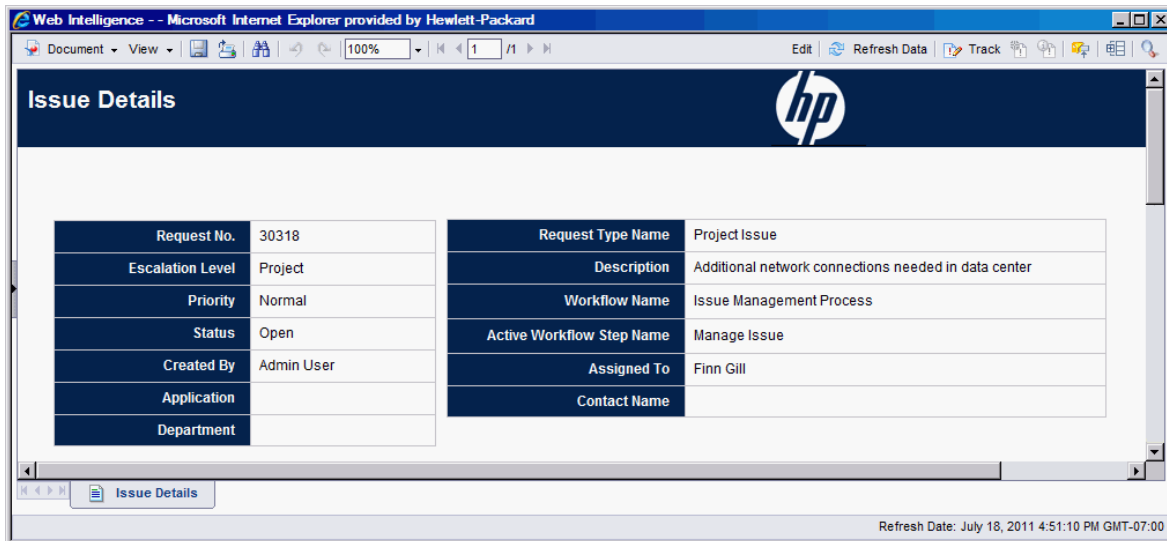
Project Issues Tab

If project issue requests have been submitted against the project you selected in the Project Status List report, the number of issues is listed in the **Issues** column at the bottom of the Project Detail report.

To view all project issues, click the **Project Issues** tab.



To view detailed information about an issue listed on the **Project Issues** tab, click its link in the **Request No.** column. The Issue Details window opens in a new browser window.



"Table 3-4. Fields displays on the Issue Details tab" below lists the fields shown on the **Issue Details** tab for a selected issue.

Table 3-4. Fields displays on the Issue Details tab

| Field | Description |
|---------------------------|---|
| Request No. | Project issue request number in PPM Center |
| Escalation Level | Escalation level of the issue. Possible values are Project or Program . |
| Priority | Priority value assigned to the project issue request |
| Status | Project issue request status |
| Created By | Name of the resource who submitted the request |
| Application | Application associated with the request |
| Department | Department associated with the project issue request |
| Request Type Name | Name of the request type |
| Description | Description of the project issue |
| Workflow Name | Name of the workflow assigned to the project issue request |
| Active Workflow Step Name | Current workflow step reached by the request |
| Assigned To | Name of the resource assigned to the request |
| Contact Name | Name of the contact (if any) assigned to the request |

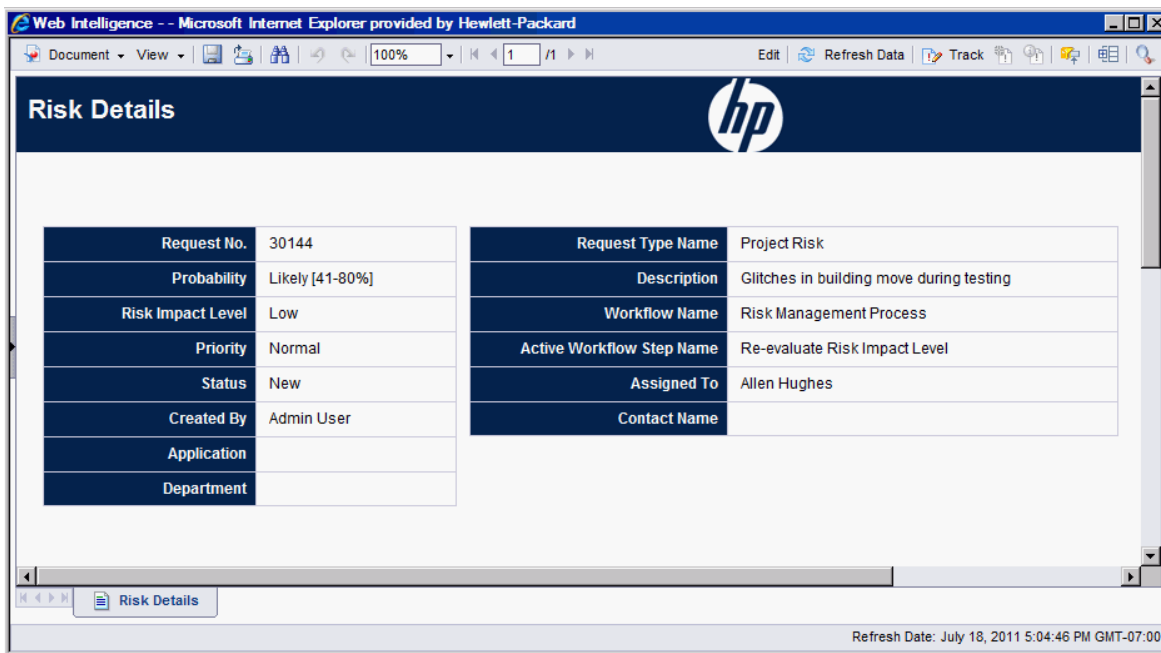
Project Risks Tab

If project risk requests have been submitted against the project selected in the Project Status List report, the number of risks is listed in the **Risks** column at the bottom of the Request Detail report.

To view all project risks, click the **Project Risks** tab.

| Request No. | Description | Status | Priority |
|-----------------------|---|--------|----------|
| 30141 | Hardware Procurements is delayed by Vendor | New | Low |
| 30142 | Key business stakeholder has left organization. | New | Low |
| 30146 | Patch release incompatibility with desktop publishing SW | New | Low |
| 30161 | Hiring freeze - need additional resources to finish on schedule | New | Low |
| 30144 | Glitches in building move during testing | New | Normal |

To view detailed information about an issue listed on the **Project Risks** tab, click its link in the **Request No.** column. The Risk Details window opens in a new browser window.



"Table 3-5. Fields displays on the Risk Details tab" below lists the fields shown on the **Risk Details** tab for a selected risk.

Table 3-5. Fields displays on the Risk Details tab

| Field | Description |
|---------------------------|---|
| Request No. | Project risk request number in PPM Center |
| Probability | Estimated probability of the risk occurring |
| Risk Impact Level | Impact level assigned to the risk |
| Priority | Priority value assigned to the project risk request |
| Status | Current project risk request status |
| Created By | Name of the resource who submitted the request |
| Application | Application associated with the request |
| Department | Department associated with the request |
| Request Type Name | Name of the request type |
| Description | Description of the project risk |
| Workflow Name | Name of the workflow assigned to the request |
| Active Workflow Step Name | Current workflow step reached by the request |

Table 3-5. Fields displays on the Risk Details tab, continued

| Field | Description |
|--------------|--|
| Assigned To | Name of the resource assigned to the request |
| Contact Name | Name of the contact (if any) assigned to the request |


Interpreting Cost Information in the Project Status List Report and the Project Status Detail Report

In PPM Center, tracking of capitalizable costs is turned on via the `COST_CAPITALIZATION_ENABLED` server configuration parameter. Each PPM Dashboard page that displays cost information behaves according to this setting. Operational Reporting, however, does not check the `COST_CAPITALIZATION_ENABLED` parameter. If the PPM Center instance is not set up to track Capital Cost, then a report displays empty Capital Cost fields, and displays Actual Cost as Operating Cost.

Project Scope Changes Tab

If project scope change requests have been submitted against the project selected in the Project Status List report, the number of scope changes is listed in the **Scope Changes** column at the bottom of the Project Status Detail report.


To view the details for a scope change request listed in the **Scope Changes** column, click its request number. The **Scope Changes** tab displays the Request Detail report for the scope change request.

Project Scope Changes


| | |
|--------------------------|----------------------------------|
| Project No: 30140 | Project Name: APO - Pilot |
|--------------------------|----------------------------------|

| Request No. | Description | Status | Priority |
|-----------------------|---|-----------|----------|
| 30440 | Oracle 11i upgrade impacts | In Review | High |
| 30438 | Please add this report | New | Low |
| 30439 | PeopleSoft upgrade requires additional interfaces | New | Normal |

To view detailed information about a scope change listed on the **Scope Changes** tab, click its link in the **Request No.** column. The Scope Change Details window opens in a new browser window.

| Scope Change Details | |  | |
|----------------------|------------|---|-------------------------------|
| Request No. | 30440 | Request Type Name | Project Scope Change Request |
| Impact Severity | Medium | Description | Oracle 11i upgrade impacts |
| CR Level | Level 2 | Workflow Name | Scope Change Request Process |
| Priority | High | Active Workflow Step Name | Review Level 2 Change Request |
| Status | In Review | Assigned To | |
| Created By | Admin User | Contact Name | |
| Application | | | |
| Department | | | |

"Table 3-6. Fields displays on the Scope Change Details tab" below lists the fields shown on the **Scope Change Details** tab for a selected scope change request.

Table 3-6. Fields displays on the Scope Change Details tab

| Field | Description |
|---------------------------|---|
| Request No. | Scope change request number in PPM Center |
| Impact Severity | Impact severity assigned to the project scope change request |
| CR Level | Change request level assigned to the project scope change request |
| Priority | Priority value assigned to the project scope change request |
| Status | Current project scope change request status |
| Created By | Name of the resource who submitted the request |
| Application | Application associated with the request |
| Department | Department associated with the request |
| Request Type Name | Name of the request type |
| Description | Description of the scope change risk |
| Workflow Name | Name of the workflow assigned to the request |
| Active Workflow Step Name | Current workflow step reached by the request |
| Assigned To | Name of the resource assigned to the request |
| Contact Name | Name of the contact (if any) assigned to the request |

Ad Hoc Reports for Project Management

This section provides information about the ad hoc operational reports that you can create for Project Management, and includes examples on how to create a few of these reports. It provides information about the contexts available for the reports, recommendations on creating the ad hoc reports, and includes guidance on how to use PPM Center universe objects in operational report queries.

Contexts for Ad Hoc Reports for Project Management

When you create an ad hoc report for Project Management, InfoView may prompt you to select a context for your report query. A context consists of a set of well-defined joins that create a unique query path involving multiple dimensions and facts.

If the multiple facts and measures in a reporting universe are related to a common set of dimensions, the joins between multiple facts and the related dimensions result in a loop. By providing separate contexts for each fact and the related dimensions, the loop is eliminated so that you can query multiple facts across a set of common dimensions.

Operational Reporting provides the following contexts for the ad hoc reports you create for Project Management data:

Table 3-7. Fields displays on the Scope Change Details tab

| Context | Usage |
|---|---|
| Actual effort for a task by resource | Use this context if you want the report to show actual effort submitted by resources against tasks. In this context, the region refers to the resource's region. |
| Cost at task level | Use this context if you want the report to show the cost of project tasks for a given workplan, or if you want to report on all of the tasks and attributes of a project. You can also use this context to compare current cost with baseline cost. |
| Effort aggregated by summary task | Use this context if you want the report to show effort information aggregated by summary task |
| Project Managers | Use this context when you want to search projects by project managers in your report, or you just want to report on project and task attributes in the workplan. |
| Scheduled effort for a task by assigned | Use if you want the report to show scheduled effort for |

Table 3-7. Fields displays on the Scope Change Details tab, continued

| Context | Usage |
|-----------------------------|---|
| resource | resources assigned to a task. In this context region refers to the project's region |
| Unassigned effort for tasks | Use this context if you want the report to show unassigned effort for tasks or if you want the report to list all of the tasks and associated attributes for a project with a specific assigned workplan. |

Best Practices for Reporting on Project Management Data

This section provides recommendations for getting the best results from the ad hoc operational reports you create for your Project Management data.

Segregating Project Manager Name from Effort and Cost Measures

Do not build queries that include effort or cost measures along with the Project Manager object. If a project has multiple managers, doing so may result in incorrect effort and cost totals.

If the sole purpose of the report is to display the effort and cost associated with each project manager, then use the All Project Managers object in the query and use the Project Manager object to create a filter to search by project manager name. If you still want to use the Project Manager object with effort and cost measures, then build separate queries, one that has the measures with other relevant dimensions, and another query for project and project managers information.

Summary Tasks with No Actual Effort Logged: Missing Region Information

If your report query includes the task dimension, effort measures, and the region dimension, the resulting report does not display region information for summary tasks that have no actual effort logged against them. The relationship between the region dimension and effort and cost measures is intended for use at a higher level (for example, project level) than task level.

Summary Tasks with No Actual Effort Logged: Extra Row in Report Results

If you build a report query that includes task attributes, project attributes, resource name, and all effort measures (actual, assigned schedule, unassigned schedule, estimated remaining effort), the report results include an extra row with the resource name "Not Assigned" for summary tasks for which no actual effort is logged.

If you do not want this extra row in your report results, add a filter condition to the query to eliminate the extra row, or modify the generated query to make the outer join between Task dimension to Effort facts an inner join instead of an outer join (done in the PM Derived Universe by default).

Reporting on Effort for Multiple Tasks with the Same Name for a Given Project

BusinessObjects groups the facts by all of the dimensions in the query to present the aggregated measures correctly. This means that if all the dimensions provided for the effort measures are the same, those dimensions are grouped together.

If you want to create a report on effort measures for project tasks, keep in mind that if some tasks for a given project have same name, then the total effort reported may be summed incorrectly. To avoid this problem, make sure that your queries include an attribute such as parent task name to distinguish between tasks with the same name.

Reporting on Estimated Remaining Effort for Projects

To create reports that show reliable estimates of remaining effort for projects, set the Track Estimated Remaining Effort flag in your project settings when you create projects.

If you include the Estimated Remaining Effort object in the **Results** section of a report query, use the Track ERE object as follows:

```
=If([Track ERE] = 1) Then [Estimated Remaining Effort] Else ""
```

Interpreting Cost Values in Operational Reports

In PPM Center, an administrator can enable the tracking of capitalizable costs by setting the `COST_CAPITALIZATION_ENABLED` server configuration parameter to `true`. Each PPM Center page that displays cost information checks this setting. However, Operational Reporting does not check this configuration setting.

If the PPM Center instance is not set up to track capital cost, then actual cost shows up under the Operating Cost in operational reports. PPM Center allows administrators to change the `COST_CAPITALIZATION_ENABLED` parameter setting even after a user has submitted capitalized cost for a project. But because Operational Reporting does not check the `COST_CAPITALIZATION_ENABLED` parameter setting, operational reports display capital cost if a user has already entered the capitalized cost for that project, regardless of how `COST_CAPITALIZATION_ENABLED` is set on the PPM Center instance.

Creating Ad Hoc Reports for Project Management

The PM Derived Universe delivered with PPM Center includes classes and objects that enable you to create your own operational reports for Project Management data. The following are just some of the ad hoc reports that you can create for your Project Management data:

- ["Project Tasks Running Behind Schedule" on the next page](#)
- ["All Effort by Project" on page 44](#)
- ["Project Effort by Task" on page 45](#)
- ["Project Effort by Resource" on page 47](#)
- ["Regional Distribution of Actual and Scheduled Effort for a Given Project" on page 48](#)
- ["Project Tasks that Start and Finish in the Next Week" on page 49](#)
- ["Comparison of Current Workplan and Baseline Workplan Attributes" on page 50](#)
- ["Total Scheduled Effort Vs Actual Effort" on page 53](#)

This section includes instructions on how to create one such report and provides descriptions of other ad hoc reports that you can create for Project Management.

Ad Hoc Report on Project Management Data: Example

You can create a report that shows which projects are running behind schedule. ["Table 3-8. PM Derived Universe objects to include in a report on projects running behind" below](#) shows the PM Derived Universe objects to use to create this Project Tasks Starting and Ending report, and where to place them on the New Web Intelligence Document page.

Table 3-8. PM Derived Universe objects to include in a report on projects running behind

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Tasks | Task Name Task Scheduled Finish Date Task Estimated Finish Date | |
| Project Effort | | Effort for Current WorkPlan |

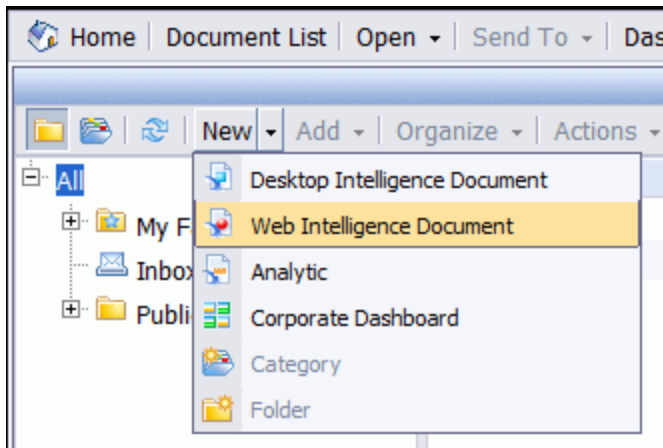
The following example includes very basic steps required to create and run this report query. For detailed information about creating Web Intelligence documents, see the *BusinessObjects Enterprise InfoView User's Guide*.

Project Tasks Running Behind Schedule

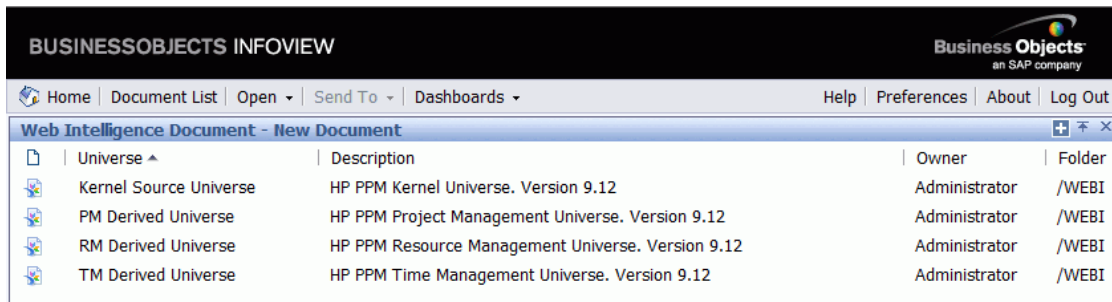
To create a report that shows which projects are running behind schedule:

1. Open a web browser window and log on to InfoView.
2. In the **Navigate** section of the InfoView home page, click **Document List**.

Note: The folders and objects visible in the Document List depend on the account you logged on to, the rights that your BusinessObjects Enterprise administrator granted to you, and the settings that you and your administrator enable.

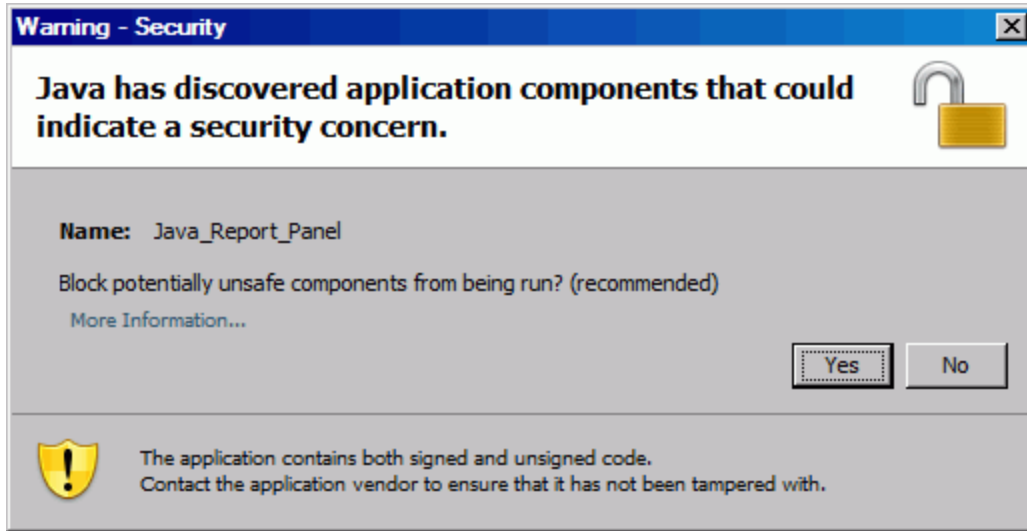


3. From the **New** list, select **Web Intelligence Document**.




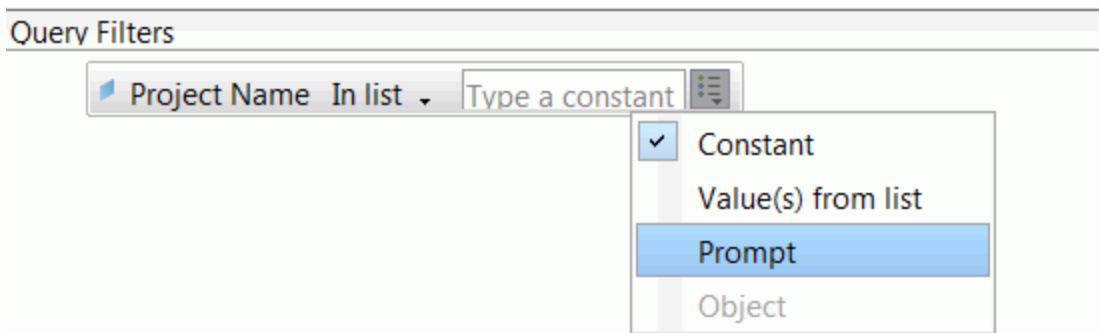
4. From the list of available universes, select **PM Derived Universe**.

5. A Warning - Security dialog box opens to advise you of a security concern related to Java application components and to allow you to block potentially unsafe components. Click **No**.



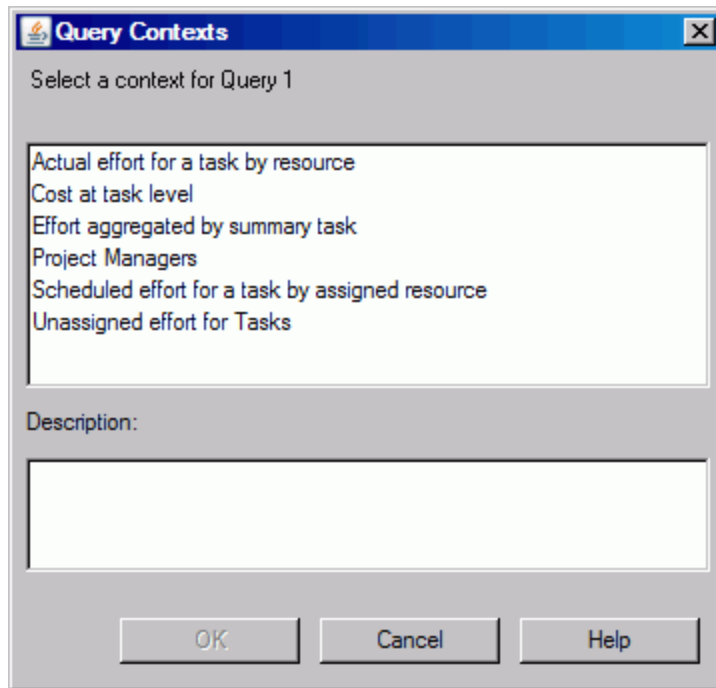
The **Data** tab in the left pane lists all of the available classes and objects in the PM Derived Universe.

6. Expand the **Project Information** class folder.
7. Drag the **Project Name** object to the **Result Objects** section on the right (top), and then drag the **Project Name** object to the **Query Filters** section on the right (bottom).
8. In the **Query Filters** panel, click the list button () at the right end of the **Project Name** box, and then select **Prompt**.



9. On the **Data** tab, expand the **Project Tasks** class folder, and then drag the **Task Name**, **Task Scheduled Finish Date**, and **Task Estimated Finish Date** objects to the **Result Objects** section.

10. On the **Data** tab, expand the **Project Effort** class folder, and then drag the **Effort for Current WorkPlan** object to the **Query Filters** section.
11. Click **Run Query**.



12. If, as in this case, the set of objects you select to construct your ad hoc report query can be retrieved through multiple join paths, the Query Context dialog box opens and prompts you to select a context for the query. Select **Scheduled effort for a task by assigned resource**, and then click **OK**.

Note: To see how a context in the list affects report results, click the context name and read the content displayed in the **Description** box.

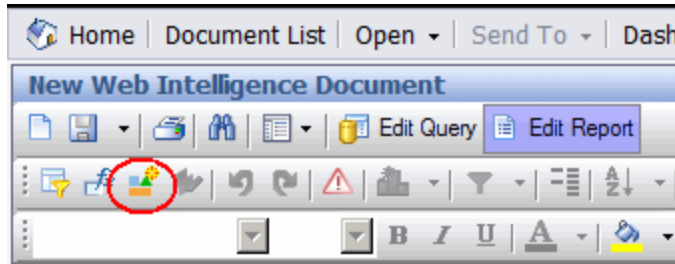
For information about the contexts for reports on Project Management data, see ["Contexts for Ad Hoc Reports for Project Management"](#) on page 35.

The Prompts dialog box opens.

13. Specify the projects to include in the report, and then click **Run Query**.
14. In addition to adding the objects listed in ["Table 3-16. PM Derived Universe objects to include in a](#)

report that compares scheduled effort, actual effort, and estimated remaining effort for a project" on page 53 to your report query, this report requires that you create a variable to find out which project tasks have been delayed. To create the variable for delayed tasks:

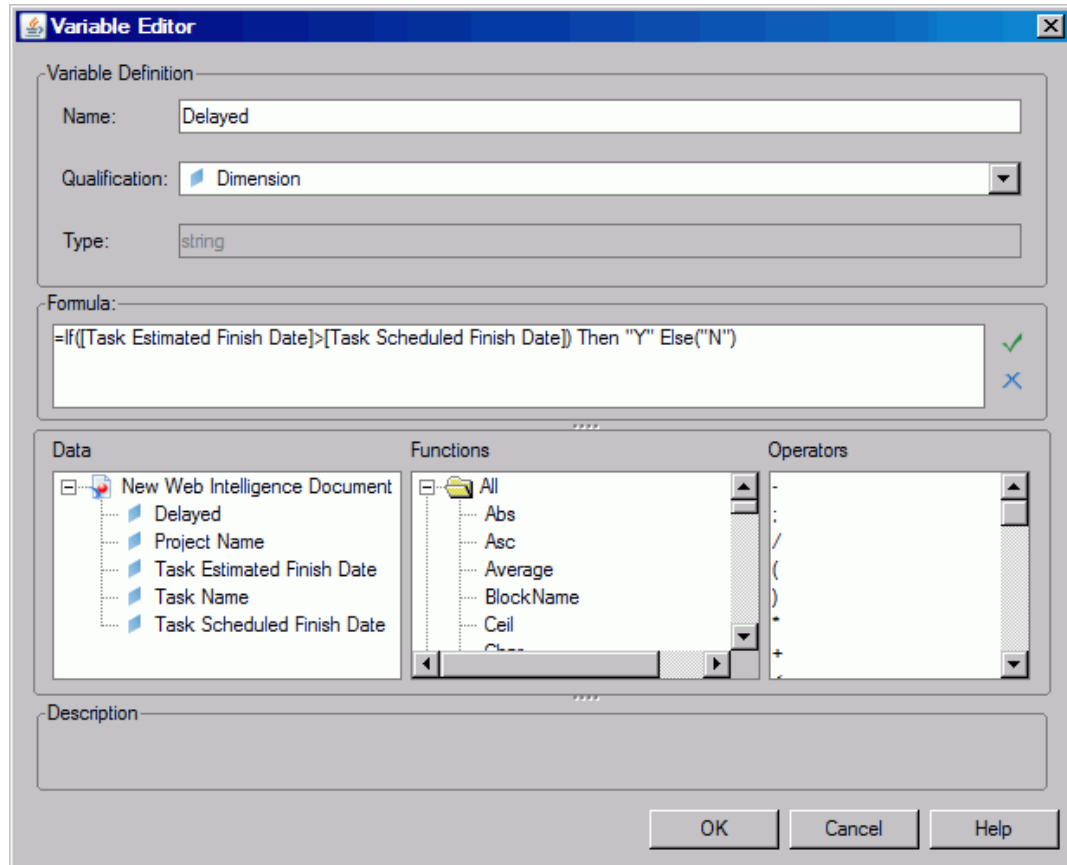
- a. In the Reporting toolbar, click **Variable Editor**.



- b. In the **Name** box, type Delayed.
- c. In the **Qualification** list, leave **Dimension** selected.

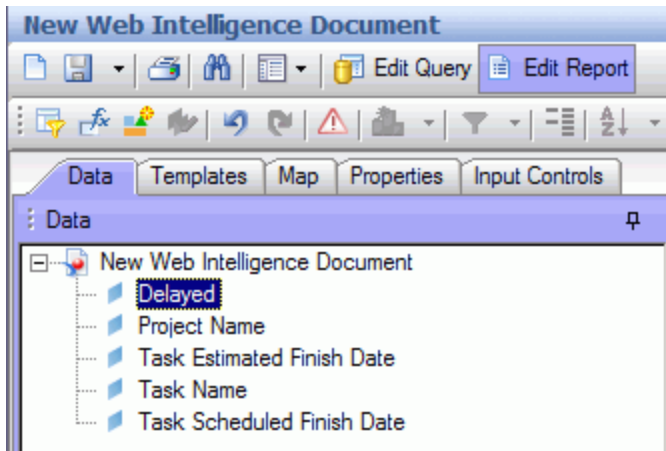
d. In the **Formula** box, add the following formula:

```
=If([Task Estimated Finish Date]>  
[Task Scheduled Finish Date]) Then "Y" Else("N")
```



e. Click **OK**.

15. On the **Data** tab, select the new Delayed variable.



16. Drag the variable to the **Report** tab and insert it where you want the **Delayed** column displayed.
17. Provide a title for the report.

Project Tasks Running Behind Schedule

| Project Name | Task Name | Task Scheduled Finish Date | Task Estimated Finish Date | Delayed |
|-----------------------|----------------------------------|----------------------------|----------------------------|---------|
| ACME Company Intranet | Intranet | 3/23/08 | 3/25/08 | Y |
| ACME Company Intranet | ATG Approval | 3/8/08 | 3/20/08 | Y |
| ACME Company Intranet | Build Solution | 3/23/08 | 3/23/08 | N |
| ACME Company Intranet | Build Test Environment | 3/9/08 | 3/9/08 | N |
| ACME Company Intranet | Compliance Approval | 3/8/08 | 3/8/08 | N |
| APO - Pilot | Conduct Training Classes | 3/9/08 | 3/22/08 | Y |
| APO - Pilot | Design Reviews | 3/8/08 | 3/8/08 | N |
| APO - Pilot | Develop Detailed Design | 3/12/08 | 3/12/08 | N |
| APO - Pilot | Develop Solution Design Document | 3/9/08 | 3/17/08 | Y |

18. Name and save the document.

All Effort by Project

A report on all effort by project lets you view scheduled effort (assigned and unassigned), actual effort and estimated remaining effort for selected projects. If you do not filter for a specific project or projects, the report results include effort information for all projects.

"Table 3-9. PM Derived Universe objects for a report that shows all effort, grouped by project" below lists the PM Derived Universe objects to use to create an Effort by Project report.

Table 3-9. PM Derived Universe objects for a report that shows all effort, grouped by project

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Effort | Assigned Scheduled Effort Unassigned Scheduled Effort Estimated Remaining Effort Actual Effort | Effort for Current Workplan |

The following figure shows sample results for this report.

All Effort by Project

| Project Name | Assigned Scheduled Effort | Unassigned Scheduled Effort | Estimated Remaining Effort | Actual Effort |
|-------------------------------|---------------------------|-----------------------------|----------------------------|---------------|
| ACME Company Intranet | | 464 | 464 | 0 |
| ACME Intranet | | 616 | 604.36 | 8 |
| APO - Pilot | 640 | 0.16 | 40 | 576 |
| AP Web Interface | | 616 | 616 | 0 |
| Barcode Asset Collection | | 616 | 616 | 0 |
| Billing Systems Integration | 1,640 | 80.16 | 1,600 | 120 |
| Bill Pay Application | | 624 | 1,064 | 20 |
| Bill Pay - QA Testing Project | | 1,000 | 1,000 | 0 |
| Business Unit Integration | | 8 | 0 | 62 |

Project Effort by Task

You can create a Project Effort by Task report that shows scheduled effort (assigned and unassigned), actual effort and estimated remaining effort associated with the tasks (summary and leaf) for a selected project. This effort information is shown as an aggregated value for summary tasks. If you do

not specify a project name as a report filter, then the report shows efforts for all projects at the task level.

"[Table 3-10. PM Derived Universe objects for a Project Effort by Task report](#)" below lists the PM Derived Universe objects to use to create a Project Effort by Task report.

Table 3-10. PM Derived Universe objects for a Project Effort by Task report

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list /Prompt |
| Project Effort | Assigned Scheduled Effort Unassigned Scheduled Effort Estimated Remaining Effort Actual Effort | Effort for Current Workplan |
| Project Tasks | Task Name Task Type | |

Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in "[Ad Hoc Report on Project Management Data: Example](#)" on page 38.

The following figure shows sample results for this report.

| Project Effort by Task | | | |
|-------------------------------|----------------------------------|------------------------------------|----------------------|
| Project Name | Assigned Scheduled Effort | Unassigned Scheduled Effort | Actual Effort |
| ACME Company Intranet | | 464 | 0 |
| ACME Intranet | | 616 | 8 |
| CRM One World | 1,272 | 448.16 | 0 |
| Distribution Access | | 616 | 0 |
| eMail Order Entry | | 1,838 | 0 |
| ERP Financial Upgrade | 1,720 | 118 | 78 |
| Neptune II | 2,032 | 1,136 | 330 |
| Intranet 2010 | 112 | 496 | 0 |
| J2EE Migration | 128 | 480 | 0 |
| Marketing WebPortal V2 | | 1,696.24 | 667.28 |

Project Effort by Resource

You can create a Project Effort by Resource report that shows scheduled effort (assigned and unassigned), actual effort, and estimated remaining effort associated with the tasks (summary and leaf) by individual resources for a selected project. Effort value for summary tasks is not aggregated. If you do not specify a project name as a report filter, then the report shows efforts for all projects at the task level.

"[Table 3-11. PM Derived Universe objects for a Project Effort by Resource report](#)" below lists the PM Derived Universe objects to use to create a Project Effort by Resource report.

Table 3-11. PM Derived Universe objects for a Project Effort by Resource report

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|--|---|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Effort | Assigned Scheduled Effort Unassigned Scheduled Effort | Effort for Current Workplan |

Table 3-11. PM Derived Universe objects for a Project Effort by Resource report, continued

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------|---|--|
| | Estimated Remaining Effort Actual Effort | |
| Project Tasks | Task Name Task Type | |
| Resources | Resource | |

Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in ["Ad Hoc Report on Project Management Data: Example" on page 38.](#)

Regional Distribution of Actual and Scheduled Effort for a Given Project

A manager of a project with resources located in several different regions can create a report that quickly provides an overview of the distribution of effort (unassigned scheduled effort, assigned scheduled effort, and actual effort) across all of the regions. ["Table 3-12. PM Derived Universe objects to include in a report on the regional distribution of actual and scheduled effort for a project" below](#) shows the PM Derived Universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 3-12. PM Derived Universe objects to include in a report on the regional distribution of actual and scheduled effort for a project

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Region | Region Name | |
| Project Effort | Assigned Scheduled Effort Unassigned Scheduled Effort Actual Effort | Effort for Current WorkPlan |

Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in ["Ad Hoc Report on Project Management Data: Example" on page 38.](#)

Project Tasks that Start and Finish in the Next Week

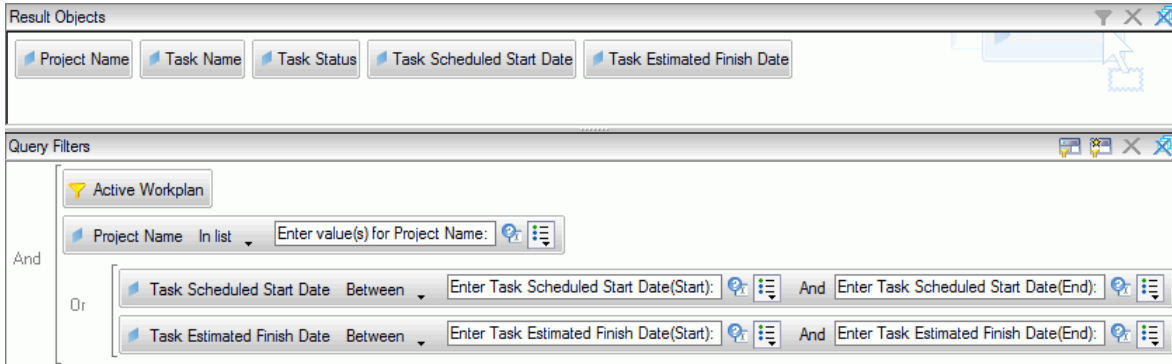
A manager of multiple projects can create a report that shows all project tasks, scheduled start and end dates for all tasks that are scheduled to start or end during the next week. A project manager can group these report data by date or by project. "Table 3-13. PM Derived Universe objects to include in a report on project tasks scheduled to start or end during the next week" below shows the PM Derived Universe objects to use to create this Project Tasks Starting and Ending report, and where to place them on the New Web Intelligence Document page.

Table 3-13. PM Derived Universe objects to include in a report on project tasks scheduled to start or end during the next week

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|---|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Tasks | Task Name Task Status Task Scheduled Start Date Task Estimated Finish Date | Task Scheduled Start Date / Between / Prompt And Prompt Task Estimated Finish Date e / Between / Prompt And Prompt |
| Project Workplans | | Active Workplan |
| Project Effort | | Effort for Current WorkPlan |

Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in "Ad Hoc Report on Project Management Data: Example" on page 38.

Nest the objects in the **Query Filters** section as shown in the following figure.



When the Query Context dialog box opens and prompts you to select a context for the query, select **Scheduled effort for a task by assigned resource**

The following figure shows example results for a report on tasks scheduled to start or end during the next week for a specific project.

**Tasks Starting and Finishing During the Next Work Week
 DJM Project with Financial Summary**

| Project Name | Task Name | Task Status | Task Scheduled Start Date | Task Estimated Finish Date |
|------------------------------------|----------------|---------------------|---------------------------|----------------------------|
| DJM Project with Financial Summary | LEAF TASK 2.2 | Ready | 3/9/11 | 4/28/11 |
| DJM Project with Financial Summary | LEAF TASK 2.4 | Ready | 3/9/11 | 4/28/11 |
| DJM Project with Financial Summary | MILESTONE 1 | Pending Predecessor | 4/28/11 | 4/28/11 |
| DJM Project with Financial Summary | SUMMARY TASK 2 | Active | 3/7/11 | 4/28/11 |

Comparison of Current Workplan and Baseline Workplan Attributes

"Table 3-14. PM Derived Universe objects to include in a report that compares current and baseline workplan attributes" on the next page shows the PM Derived Universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 3-14. PM Derived Universe objects to include in a report that compares current and baseline workplan attributes

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Workplan | Workplan Name Workplan Type Name | Is Active / Equal to / Constant (Y) |
| Project Header | Scheduled Duration Scheduled Finish Date Percent Complete | |
| Project Effort | Assigned Scheduled Effort Unassigned Scheduled Effort Estimated Remaining Effort Actual Effort | |

Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in ["Ad Hoc Report on Project Management Data: Example" on page 38.](#)

The following figure shows example results for a report designed to compare current workplan and baseline workplan attributes.

| Project Name | Workplan Name | Workplan Type Name | Scheduled Duration | Scheduled Finish Date | Percent Complete | Assigned Scheduled Effort | Unassigned Scheduled Effort | Estimated Remaining Effort | Actual Effort |
|-------------------------------|------------------------|--------------------|--------------------|-----------------------|------------------|---------------------------|-----------------------------|----------------------------|---------------|
| 65 nm ASIC Alpha Tools - FY11 | 65 nm ASIC Alpha Tools | Workplan | 343 | 4/14/12 | 15 | 38,511.6 | 89.6 | 21,035.6 | 3,920.92 |
| 65 nm ASIC Alpha Tools - FY11 | Baselined On9/25/11(2) | Baseline | 343 | 4/14/12 | 15 | 31,247.6 | 89.6 | 8,139 | 2,942.17 |

Project Status by Project Manager

You can create a report that lets you quickly see the current status and health of projects assigned to project managers. ["Table 3-15. PM Derived Universe objects to add to a query for a report on the status of projects assigned to project managers" on the next page](#) shows the PM Derived Universe objects to use to create a Project Status by Project Manager report, and where to place them on the New Web Intelligence Document page.

Table 3-15. PM Derived Universe objects to add to a query for a report on the status of projects assigned to project managers

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Header | All Project Manager Project Status Cost Health Issue Health Schedule Health Overall Health | Project Manager / In list / Prompt |

Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in ["Ad Hoc Report on Project Management Data: Example"](#) on page 38.

The following figure shows example results for the Project Status by Project Manager report.

Ross Nelson

| Project Name | Project Status | Cost Health | Issue Health | Schedule Health | Overall Health |
|---|----------------|-------------|--------------|-----------------|----------------|
| MIPSCMS11 Clean Sheet Onboarding - Q1 | Active | | GREEN | GREEN | GREEN |
| MIPSPUB10 CS – EPO Deployments | Active | | GREEN | GREEN | GREEN |
| DCC Oracle Extranet ie Flying Machine | Cancelled | | | | NONE |
| ECOMKVHFY08-Shadow IT implementations | Cancelled | | | NONE | NONE |
| MIPSHPC09 NextGen Adaptive Publishing - Editorial and | Cancelled | | | NONE | NONE |
| ECOMKSHPC08 - DSPP: RepTool migration & ASTA/DC | Complete | | | NONE | NONE |
| ECOMKVHFY08-DCC DSPP | Complete | | | RED | NONE |
| ECOMKVHFY08-DSPP funding - FY08 | Complete | | | NONE | NONE |
| ECOMKVHFY08-ISV Dashboard funding - FY08 | Complete | | | NONE | NONE |
| MIPSCMS10 CS - EPO PRISM Image Management Retire | Complete | | | NONE | NONE |
| MIPSPUB09 NG - hp.com Clean Sheet | Complete | | GREEN | NONE | GREEN |
| MIPSPUB10 CS - Campaign Support | Complete | | | NONE | NONE |
| MIPSPUB10 CS - EPO Download Solution | Complete | | GREEN | NONE | GREEN |
| MIPSPUB10 CS – EPO Product Content Integration | Complete | | | NONE | NONE |
| TSG Marketing Innovation - DSPP & ISV Dashboard | Complete | GREEN | | RED | NONE |
| MIPSPUB10 NextGen Solution Deployment eCommerce | Estimated | | GREEN | | GREEN |
| ECOTSGCAYN08 - TSG Cayenne | Interlocked | | GREEN | | GREEN |
| ECOMKSHPC09 NextGen Adaptive Pub Portlet Construct | Obsolete | | GREEN | NONE | GREEN |

Total Scheduled Effort Vs Actual Effort

As a project manager, you can create a report that shows the total scheduled effort (including assigned and unassigned effort), the actual effort, and the estimated remaining effort for a project for which you are responsible.

"[Table 3-16. PM Derived Universe objects to include in a report that compares scheduled effort, actual effort, and estimated remaining effort for a project](#)" below lists the PM Derived Universe objects to add to a Web Intelligence document to create this report in InfoView.

Table 3-16. PM Derived Universe objects to include in a report that compares scheduled effort, actual effort, and estimated remaining effort for a project

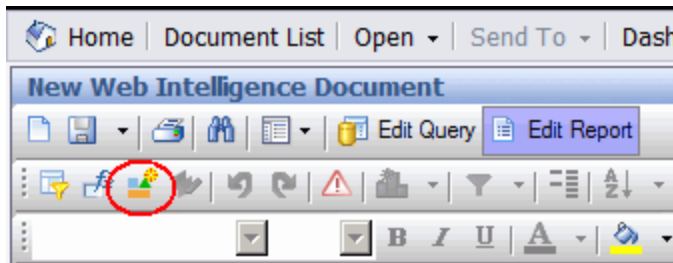
| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Project Effort | Assigned Scheduled Effort Unassigned Scheduled Effort Actual Effort Estimated Remaining Effort | Effort for Current Workplan |
| Project Header | Project Status | |


Note: For an example of how to add objects to a Web Intelligence document, see the procedure described in "[Ad Hoc Report on Project Management Data: Example](#)" on page 38.

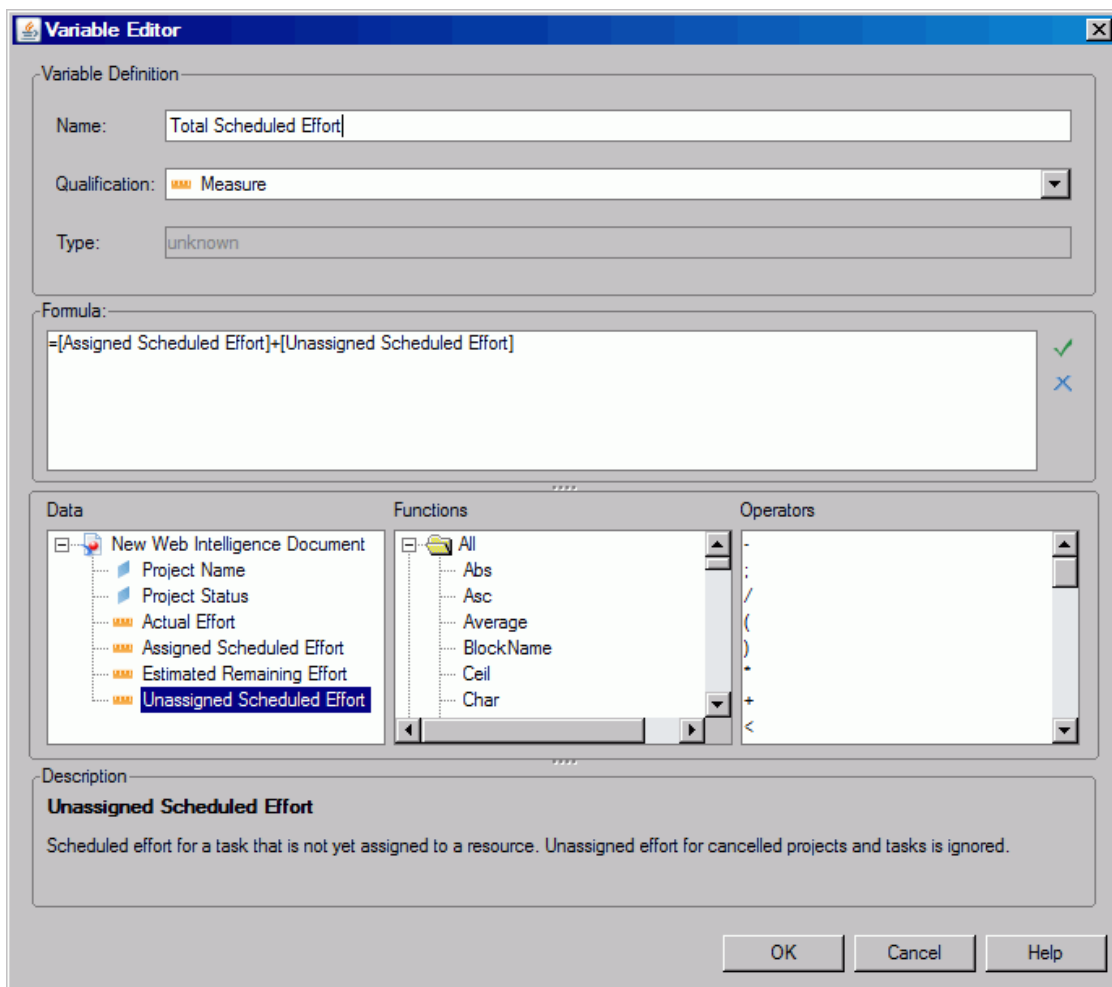
In addition to adding the objects listed in "[Table 3-16. PM Derived Universe objects to include in a report that compares scheduled effort, actual effort, and estimated remaining effort for a project](#)" above to your report query, this report requires that you create a variable to calculate the total scheduled effort (sum of assigned scheduled effort and unassigned scheduled effort).

To create the variable for total scheduled effort:

1. After you add all of the objects to the report query, run the query.



2. In the Reporting toolbar, click **Variable Editor** ().



3. In the **Name** box, type Total Scheduled Effort.
4. From the **Qualification** list, select **Measure**.

5. In the **Formula** box, add the following:

$$=[\text{Assigned Scheduled Effort}] + [\text{Unassigned Scheduled Effort}]$$

6. Click **OK**.

7. In the left pane, click the **Data** tab.

8. Select the new **Total Scheduled Effort** object, drag it to the **Report** tab on the right, and insert it where you want the **Total Scheduled Effort** column displayed in the report.

The following figure shows example results for a report that compares scheduled effort, actual effort, and estimated remaining effort for a project.

| Project Name | Project Status | Assigned Scheduled Effort | Unassigned Scheduled Effort | Total Scheduled Effort | Estimated Remaining Effort | Actual Effort |
|-------------------------------|------------------------------|---------------------------|-----------------------------|------------------------|----------------------------|---------------|
| ACME Company Intranet | Active | | 464 | 464 | 464 | 0 |
| ACME Intranet | Assign Project Manager | | 616 | 616 | 604.36 | 8 |
| APO - Pilot | Construct | 640 | 0.16 | 640.16 | 40 | 576 |
| AP Web Interface | Detailed Project Definition | | 616 | 616 | 616 | 0 |
| Barcode Asset Collection | Assign Project Manager | | 616 | 616 | 616 | 0 |
| Billing Systems Integration | Detailed Project Definition | 1,640 | 80.16 | 1,720.16 | 1,600 | 120 |
| Bill Pay Application | Check Test Completion Status | | 624 | 624 | 1,064 | 20 |
| Bill Pay - QA Testing Project | Define QC Profile | | 1,000 | 1,000 | 1,000 | 0 |
| Business Unit Integration | Detailed Project Definition | | 8 | 8 | 0 | 62 |

Reporting on Resource Management

- ["About this Chapter" below](#)
- ["Demand Vs Capacity Report" below](#)
- ["Ad Hoc Reports for Resource Management" on page 64](#)

About this Chapter

This chapter addresses Operational Reporting for Resource Management. It provides information about the preconfigured Demand Vs Capacity report, which HP supplies, and some of the many the ad hoc reports that you can create for your Resource Management data.

Note: If your organization has multilingual Operational Reporting enabled, make sure that you configure InfoView to display your operational report data correctly for your locale. For instructions, see ["Using BusinessObjects for Operational Reports" on page 16](#).

Demand Vs Capacity Report

The Demand Vs Capacity Report that HP supplies with Operational Reporting is designed to help you review and proactively manage demand to optimize resource use within your organization. This report enables you to view PPM Center resource capacity (from resource pools, both named and unnamed), demand (from staffing profiles broken down by committed, soft-booked, and unmet demand), and the actual effort coming from time sheets. You can use the Demand Vs Capacity report to compare demand against capacity for different roles by grouping the data by region, resource pool level, or role.

Note: Because capacity is not assigned for a staffing profile or a position, resource capacity is captured within the context of a resource pool, and not in the context of staffing profile. Capacity for a resource is assigned by a resource pool manager who may not know how (to what position) a resource is to be allocated.

The actual effort shown in the Demand Vs Capacity report reflect all of the time that resources have logged in time sheets, except for time logged on time sheets that have been cancelled. If time logged against a task is rejected, that actual effort is excluded from the report.

Note: PPM Center's TM-PM Sync Service rolls up time sheet actuals to projects. Depending on how often this service is scheduled to run on your PPM Center system, the actual effort displayed in the Demand Vs Capacity report may not exactly match the staffing profile actuals.

Grouping Report Data

You can group demand, capacity, and effort information presented in the report based on region, resource pool, or role. Based on the grouping parameter you select (you select only one grouping parameter at a time), the report displays an aggregate total for each group.

"[Table 4-1. Data display in the Demand Vs Capacity report based on grouping](#)" below provides information about how the Demand Vs Capacity report displays data based on the grouping you select.

Table 4-1. Data display in the Demand Vs Capacity report based on grouping

| Selected Grouping | Data Displayed |
|-------------------|--|
| Role | <p>Capacity is displayed at the role level as total. Demand is displayed at the role level per staffing profile and total for each role level.</p> <p>If a resource is assigned to a position to meet the demand, then one of the following is true:</p> <ul style="list-style-type: none"> • The resource role (associated with the corresponding capacity) is the same as the role of the position to which this resource is assigned. In other words, the capacity role is the same as the demand role. • The resource role (associated with the corresponding capacity) is different from the role of the position to which this resource is assigned. That is, capacity role is not the same as the demand role. <p>In either case, the Demand Vs Capacity report shows capacity as a function of the resource's role, and shows demand as a function of the position's role.</p> |
| Resource Pool | <p>Both capacity and demand are displayed at the role level for each resource pool. You can view capacity from both named and unnamed resource pools.</p> |
| Region | <p>Both capacity and demand are displayed at the role level for each region.</p> <p>Resource pool capacity is accounted against the resource pool region and demand is accounted against the staffing profile position's resource pool region for both unmet and met demand. One exception to this is that, if there is unmet demand that is not associated with a resource pool, then the report accounts for the unmet demand against the staffing profile</p> |

Table 4-1. Data display in the Demand Vs Capacity report based on grouping, continued

| Selected Grouping | Data Displayed |
|-------------------|---|
| | <p>region.</p> <p>Note: In an ad hoc Demand Vs Capacity report that includes the query "show the demand for positions in a staffing profile," all demand is accounted against the staffing profile region if you select the Demand from Staffing Profile Region context. For an ad hoc Demand Vs Capacity report that includes the query "show the capacity of resources in a resource pool," all of the capacity is accounted against the resource pool region.</p> |

How Regional Calendar Affects Demand Vs Capacity Report Data

"[Table 4-2. Calendars used to calculate capacity \(in hours, person days, and FTEs\) for different PPM Center entities](#)" below lists the calendars that affect how resource capacity is calculated for the Demand Vs Capacity report.

Table 4-2. Calendars used to calculate capacity (in hours, person days, and FTEs) for different PPM Center entities

| | Calendar | Description |
|---|---|---|
| A | Resource Regional Calendar | Calendar associated with the resource's region. |
| B | Resource Calendar | Calendar on the resource detail page, which is derived from the resource's regional calendar (A). |
| C | Resource Pool Calendar | Calendar associated with the resource pool through the resource pool's region. |
| D | Staffing Profile Calendar | Calendar associated with the staffing profile via the staffing profile's region. |
| E | Staffing Profile Default Resource Pool Calendar | Calendar associated with the staffing profile's default resource pool. |
| F | Position (Resource Pool) Calendar | Calendar associated with the position's resource pool. |

The following sections describe how the calendars listed in "[Table 4-2. Calendars used to calculate capacity \(in hours, person days, and FTEs\) for different PPM Center entities](#)" above affect PPM Center entities.

Capacity for Named Resources

When a named resource is added to the resource pool, the available number of hours or days for that resource comes from the Resource Calendar (B). The FTE is calculated against the Resource Regional Calendar (A).

Capacity for Unnamed Resources

The available number of hours or person days or FTE is manually entered for unnamed and conversion to FTE or hours is calculated against the Resource Pool Calendar (C).

Demand

If a staffing profile has a Regional Calendar and no default resource pool, then:

- When a position is created and no resource pool is linked to it, the demand entered is converted to hours or FTE against the Staffing Profile Calendar (D).
- When a position is created and is linked to a resource pool, the demand entered is converted to hours or FTE against the position's Resource Pool Calendar (F).
- When a position's assignment is created, the entered met demand values are defaulted from the Resource Calendar (B) and the hours or FTE is calculated against the resource's Regional Calendar (A).
- Unmet demand for position is also calculated against position's Resource Pool Calendar (F).

If a staffing profile has a regional calendar and a default resource pool, then:

- The default resource pool for the staffing profile is used just to default this pool on position. Because the position's resource pool for calculating the demand is considered, it does not matter whether this was a default pool or an overwritten pool.

Note: Between Demand (position) and Met Demand (assignment), even if the demand is met by FTE, the number of hours can vary if they use different calendars.

If an assignment is made and then the calendar is changed, the data is not retroactively changed to reflect the changes in calendars.

Running the Demand Vs Capacity Report



To run the Demand Vs Capacity Report, do the following:

1. Open a web browser window and log on to InfoView.
2. In the **Navigate** section or in the header panel of the InfoView home page, click **Document List**.

Note: The folders and objects visible in the document list vary, depending on the account you logged on to, the rights that your BusinessObjects Enterprise administrator granted to you, and the settings that you and your administrator enable.

3. In the Tree panel in the left portion of the page, expand the **Public Folders** folder, and then select **HP PPM Reports**.
4. In the panel to the right, double-click **Demand Vs Capacity Report**.

The Prompts dialog box lists the prompts that are available for the report query. All prompts for which values are required have default values, but you can change these values, and specify values for any or all of the optional prompts listed.

Note: A green check mark () to the left of a listed prompt indicates that the prompt is required, and that a value has been specified for it. A red arrow () to the left of a listed prompt indicates that the prompt is required and you must specify a value for it before you can run the report query.

5. To filter the data further, before you run the report, provide information for the prompts listed and described in the following table.

Note: If you do not specify a value for a prompt, the filter is not applied to report data.

| Prompt | |
|-------------------|--|
| * Value Required | Description |
| *Primary Grouping | Determines how data are categorized in the report. Select one of the following values: |

| Prompt | |
|-------------------|---|
| * Value Required | Description |
| | <ul style="list-style-type: none"> ○ Region ○ Resource Pool ○ Role |
| *Begin Period | Determines the first time period for which data are displayed in the report. Select a value from the Available Periods list. |
| *End Period | Determines the last time period for which data are displayed in the report. Select a value from the Available Periods list. |
| *Time Granularity | <p>Determines the time interval for data displayed in the report. Select one of the following values:</p> <ul style="list-style-type: none"> ○ Year displays time periods as yyyy ○ Half Year displays time periods as h1 or h2/yyyy ○ Quarter displays time periods as quarter/yyyy ○ Month displays time periods as mm/yyyy ○ Week displays time periods as mm/dd/yyyy <p>Note: If you specify a long report period and Week as the time granularity, and you export the generated report data to Microsoft Excel, the data in the resulting Excel file may be truncated as a result of formatting limitations. You can only work around this by exporting the Web intelligence document to a text file, and then opening that file in Excel. File formatting is lost in this case.</p> |
| *Time Unit | <p>Determines the time unit (FTE, person days, or hours) to use to display capacity and demand data in the report. Select one of the following values:</p> <ul style="list-style-type: none"> ○ FTE ○ Person Days ○ Hours |

| Prompt | |
|-------------------|--|
| * Value Required | Description |
| Resource Pool | Determines which resource pools are represented in the report. From the Resource Pool Name list, select one or more resource pools names. |
| Region | Determines the region for which data are displayed in the report. Select a value from the Region list. |
| Role | Determines the roles represented in the report. Select one or more values from the Role Name list. |
| Resource Category | InfoView lists all of the resource categories defined for resources in PPM Center. From the Resource Category list, select one or more resource categories to include in the report. |

6. From the list in the top section of the dialog box, select a prompt.
7. InfoView lists available values for some prompts in the box in the lower left portion of the dialog box. If no values are listed for the prompt you select, click **Refresh Values** to display the values.
8. After you finish specifying optional data filters, click **Run Query**.

Web Intelligence retrieves the data for the default values and returns the results in the report.

Demand Vs Capacity Report Results

"[Table 4-3. Columns displayed in the Demand Vs Capacity Report](#)" below provides descriptions of the columns displayed in the Demand Vs Capacity Report.

Table 4-3. Columns displayed in the Demand Vs Capacity Report

| Column | Description |
|-------------------|---|
| Grouping category | Reflects the grouping category selected for the report. (See " **Primary Grouping " on page 60.) |
| Time Unit | Displays the unit (hours, person days, FTEs) used to express capacity, demand, and effort in the report. |
| Resource Pool | Displays the names of the resource pools represented by the report data and a No Resource Pool row for demand that is not assigned to any resource pool. |

Table 4-3. Columns displayed in the Demand Vs Capacity Report, continued

| Column | Description |
|--------------------|--|
| Role | Displays the role(s) within each resource pool for which report data are displayed. If no filter has been specified for the Role prompt, this column lists all roles for each resource pool. |
| Time period | Column headings that show the time period for the report data are displayed from left to right, starting with the first report period and ending with the report finish period. Time period is formatted based on the value selected for the "*Time Granularity" on page 61 prompt. |
| Demand | <p>Displays a breakdown of demand for the time period under the following column subheadings (expressed in the selected for the "*Time Unit" on page 61 prompt) for each role in each resource pool represented in the report (and for demand unassigned to any resource pool:</p> <ul style="list-style-type: none"> • Committed - Displays demand for which resource pool resources are committed. • Soft Booked - Displays demand for which resource pool resources are soft-booked. • Unmet - Displays unmet demand. • Total Demand - Displays <p>Total demand for each of these columns is displayed for each resource pool, as well as for the demand that is not assigned to any resource pool.</p> |
| Capacity | <p>For each time period, displays a breakdown of capacity (expressed in the units selected for the "*Time Unit" on page 61 prompt) by role/resource pool for the following categories:</p> <ul style="list-style-type: none"> • Named - Displays capacity for named resources. • Unnamed - Displays capacity for unnamed resources. • Total Capacity - Displays total capacity for named and unnamed resources. |
| Demand Vs Capacity | For each time period, this column displays the discrepancy, if any, between total demand and total capacity for each role/resource pool. If demand exceeds capacity, the value is displayed in red text in parentheses. If capacity equals or exceeds demand, the value is displayed in black text. |
| Actual Effort | For each time period, displays a breakdown of actual effort (expressed in the units selected for the "*Time Unit" on page 61 prompt) by role/resource pool. |

Ad Hoc Reports for Resource Management

This section provides information about the operational reports that you can create for Resource Management, and includes examples on how to create a few of these reports. It provides information about the contexts available for the reports, recommendations on creating the ad hoc reports, and includes guidance on how to use PPM Center universe objects in operational report queries.

Contexts for Ad Hoc Reports for Resource Management

When you create an ad hoc report for Resource Management, InfoView may prompt you to select a context for your report query. A context consists of a set of well-defined joins that create a unique query path involving multiple dimensions and facts.

If the multiple facts and measures in a reporting universe are related to a common set of dimensions, the joins between multiple facts and the related dimensions result in a loop. By providing separate contexts for each fact and the related dimensions, the loop is eliminated, so that you can query multiple facts across a set of common dimensions.

Operational Reporting provides the following contexts for the ad hoc reports you create for Resource Management data:

- Resource Capacity

Use the "Resource Capacity" context to retrieve capacity information across Resource, Resource pool, Roles, Org Unit over a fiscal time period. In this context, Region refers to the Resource Pool's region, Role refers to the resource's primary role and Organization Unit refers to the resource pool's organization unit

- Resource Demand on Resource Pool Region

Use the "Resource Demand on Resource Pool Region" context to view resource demand (as in the preconfigured Demand Vs Capacity report) based on region. Demand assigned to a resource pool is treated as a demand on the resource pool's region. Demand that is not associated with a resource pool is treated as coming from the staffing profile's region.

In this context, Region refers to the resource pool's region, Role refers to the position's role, and Organization Unit refers to the staffing profile's Organization Unit.

- Resource Demand from Staffing Pool Region

Use the "Resource Demand from Staffing Pool Region" context to retrieve resource demand data across positions, staffing profiles, resource pools, regions, and fiscal periods and to see which region (associated with the staffing profile) is the source of the demand.

In this context, Region refers to the region associated with a staffing profile, Role refers to the role assigned to a position, and Organization Unit refers to the organization unit staffing profile belongs to.

- Resource Effort

Use the "Resource Effort" context to retrieve effort data across various dimensions (for example, Roles, Resource Pools, Staffing Profiles, Regions, and so on.)

In this context, Region refers to the resource's region, Role refers to the task's role (if the task has a role) or the resource's primary role, and Organization Unit refers to the primary organization unit to which the resource is assigned.

- Resource Pool in a region and its Org Unit

Use the "Resource Pool in a region and its Org Unit" context to retrieve the resource pools in a region and the org units to which resource pools belong.

Best Practices for Reporting on Resource Management Data

This section provides recommendations for getting the best results in the ad hoc operational reports you create for your Resource Management data.

Grouping Program Measures by Business Objective for Programs with Multiple Business Objectives

Suppose you want to construct an ad hoc report query that includes program measures (Forecast, Actuals, Approved, and so on) grouped by business objective, and you want the query results to include one or more objects from the Business Objectives class (in the FM Derived Universe). If you are reporting on a program that has multiple business objectives, the resulting data for the measures are multiplied by the number of associated business objectives. This produces incorrect report data.

To work around this issue, create a report variable that counts the number of separate business objectives for the program. Use this variable in each ad hoc report cell that displays the program measure, to divide the cell's total by this value. (The Financial Summary report uses this mechanism.)

Querying Resource Pool Measures When with Resource Pool Have Multiple Managers

Suppose you create a query that includes measures such as Capacity or Demand against the Resource Pool dimension, and your query results include the Resource Pool Manager object. If you are reporting on a resource pool that has multiple managers, the resulting data for the measures are multiplied by the number of resource pool managers. This produces incorrect report data.

To work around this issue, create two separate report queries. Design one query to retrieve the information about the resource pool dimension or any other dimension objects as necessary, without including any measures. Design a second query to retrieve the measures.

Effects of Modified Calendar Setup on Data Calculation

If you modify the calendar setup, Actual Effort data displayed in FTEs and the Person Days data within the affected time range are not automatically recalculated unless modifications are also made to the relevant timesheets.

Querying Projects with More than One Manager

In querying a project based on project manager, exercise caution when creating the filter condition for the query. If the project has multiple managers assigned to it, make sure that the query returns all projects managed based on the resource name specified in the filter, whether the resource is the only manager assigned to the project or one of several managers assigned. When you create a query filter for the Project Manager object, select the "Matches pattern" operation and add the percent character (%) at the beginning and at the end of the name selected from the list of project managers.

Displaying Demand, Capacity, and Effort Data in FTEs

Demand, Capacity, Effort cannot be calculated in full time equivalents (FTE) if a given period the system calendar setup indicates that the total number of working days for the period is zero. For example, if every day in a given week is configured as a non-working day for a shut-down period, then the demand, capacity, and effort data for that week is displayed as zero FTEs. However, the value in hours may *not* be zero. That would be the case if, for example, a resource worked during the shut-down period. Even if the calendar indicates that the number of working days is zero, the capacity or effort may not be.

To avoid inaccuracies, if the report results show zero FTEs for demand, capacity, or effort data, check the values for the same measures in hours. A non-zero value indicates the problem lies in the calendar

setup, in which case, the data returned in hours is more reliable unit for display. (The preconfigured Demand Vs Capacity report uses this mechanism to determine whether to display demand, capacity, and effort data in FTEs, or as "--" when the total number of working days in a period is calculated to be zero.)

Reporting on Resources if the Resource-Manager Hierarchy has No Top-Level Manager

In the PPM Center database, if a resource-manager hierarchy exists, but no top-level manager has been assigned to the hierarchy, then a loop exists. The results for any reports designed to include resources data excludes all of the resources. To prevent this from occurring, make sure that a top-level manager is assigned to the resource-manager hierarchy.

Querying Against Large Datasets

By default, queries time out after running for ten minutes. If you have selected query filters that retrieve a large volume of data, your query may time out and fail to return report results. To prevent this from occurring, do one or both of the following:

- Modify the universe parameters (on the **Controls** tab of the Universe Parameters dialog box) to increase the execution time limit.
- Modify the query filters to retrieve a smaller dataset.

Calculating Resource Over-Allocation

In reporting on over-allocation of a resource, make sure that you include the Staffing Profile Name object in the query result, and not just the Project Name object. This is especially important if a resource is assigned to multiple staffing profiles (some of which may be free-standing) or if org unit staffing profiles and not related to the project. If you add only the Project Name object without including the Staffing Profile Name object, the results exclude the assignment to the resource for non-project staffing profiles, and may not accurately reflect over-allocation.

Comparing the Role of a Position and the Role of a Resource Assigned to the Position

In creating a query that compares the role of a position with the actual role of a resource assigned to that position, you must do the following:

- Select the Role Name object (Roles class) for the role of the position
- Select the Primary Role object (Resource class) for the role of the resource
- Select either the ["Resource Demand from Staffing Pool Region" on page 64](#) or ["Resource Demand on Resource Pool Region" on page 64](#) context.

Creating Ad Hoc Reports for Resource Management

The RM Derived Universe delivered with PPM Center includes classes and objects that enable you to create your own operational reports for Resource Management data. The following are just some of the ad hoc reports that you can create for your Resource Management data:

- ["Resources Assigned to Projects" on the next page](#)
- ["All Resources in a Resource Pool" on page 74](#)
- ["Baseline Demand Vs. Active Staffing Profile Demand for a Project" on page 76](#)
- ["Demand, Capacity, and Actual Effort Report \(Grouped by Primary Organizational Unit\)" on page 77](#)
- ["Total Demand Vs. Capacity Plus Additional Resource Pool Data" on page 78](#)
- ["Resource Pools by Region" on page 79](#)
- ["All Resources by Resource Category" on page 80](#)
- ["All Assignments to Resource \(by Staffing Profile\) with Role, Showing All Effort" on page 81](#)
- ["Staffing Profile Details for Resources" on page 82](#)

This section includes instructions on how to create one such report and provides descriptions of other ad hoc reports that you can create for Resource Management.

Creating an Ad Hoc Report on Resource Management Data: Example

A resource pool manager who needs to know how the resources in various resource pools are distributed across projects can quickly create a report that provides this information. ["Table 4-4. RM Universe objects to include in a report on the resources in PPM Center resource pools" on the next page](#) shows which RM Universe objects are required to create this report, and where they belong in the New Web Intelligence Document page.

Table 4-4. RM Universe objects to include in a report on the resources in PPM Center resource pools

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|--|--|
| Project Information | Project Name | Project Name / In list / Prompt |
| Resources | Resource Name | |
| Resource Pools | Resource Pool Name Resource Pool Managers | |
| Roles | Role Name | |

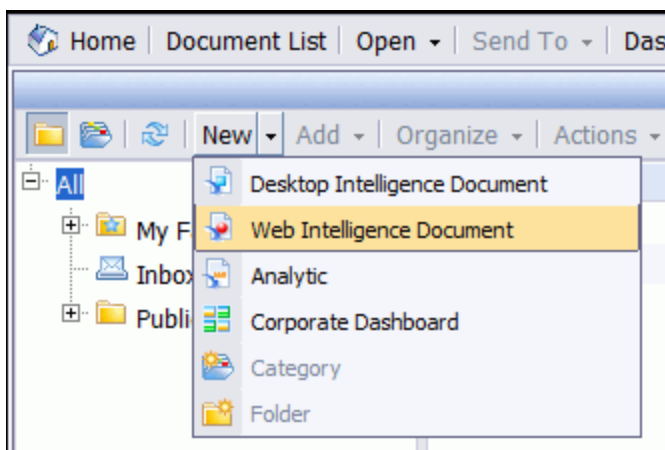
The following example includes the basic steps required to create and run this report query. For detailed information about creating Web Intelligence documents, see the *BusinessObjects Enterprise InfoView User's Guide*.

Resources Assigned to Projects

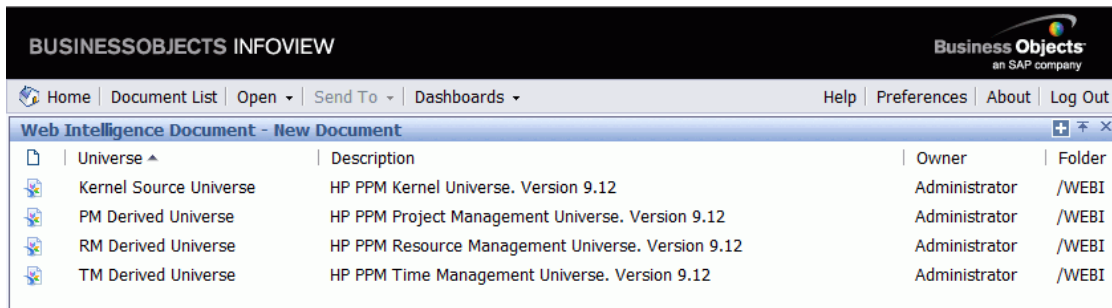
To create a report that shows the resource pools and resources assigned to projects:

1. Open a web browser window and log on to InfoView.
2. In the **Navigate** section of the InfoView home page, click **Document List**.

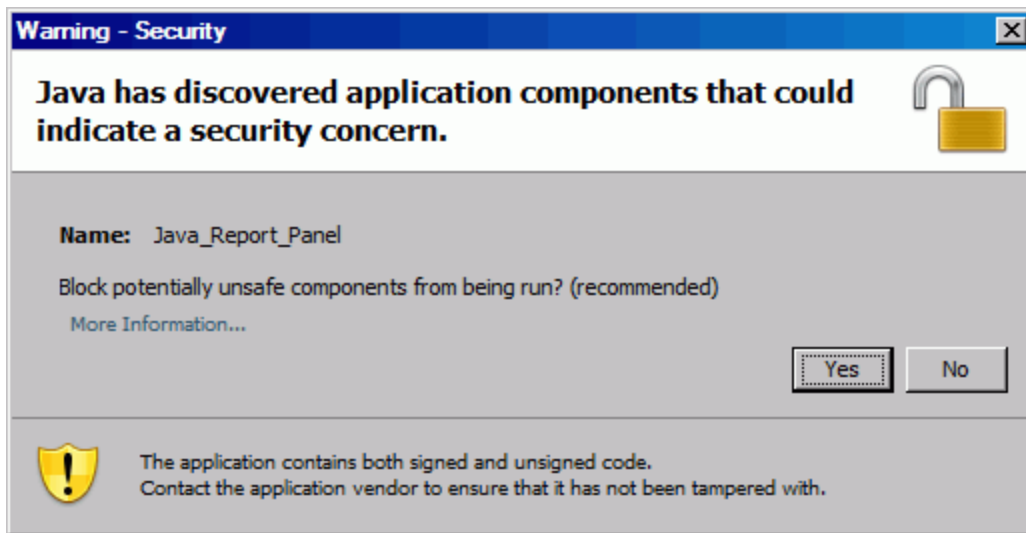
Note: The folders and objects visible in the Document List depend on the account you logged on to, the rights that your BusinessObjects Enterprise administrator granted to you, and the settings that you and your administrator enable.



3. From the **New** list, select **Web Intelligence Document**.



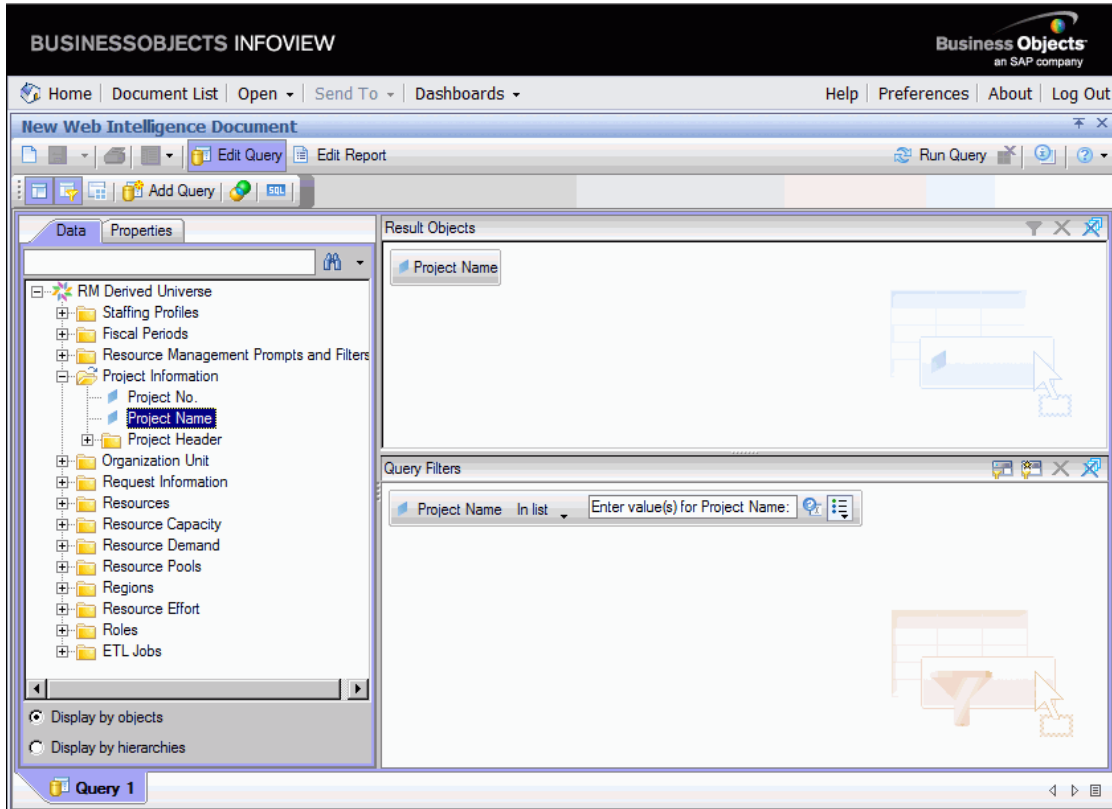
- From the list of available universes, select **RM Derived Universe**.
- A Warning - Security dialog box opens to advise you of a security concern related to Java application components and to allow you to block potentially unsafe components. Click **No**.




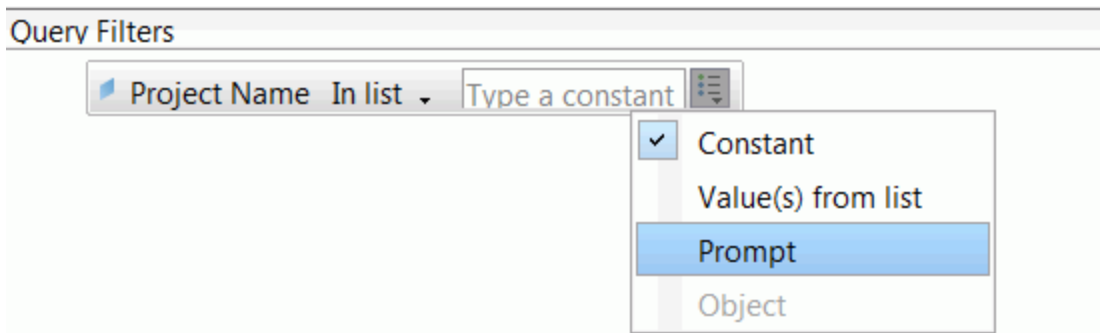
The **Data** tab in the left pane lists all of the available classes and objects in the RM Derived Universe.

- Expand the **Project Information** class folder.

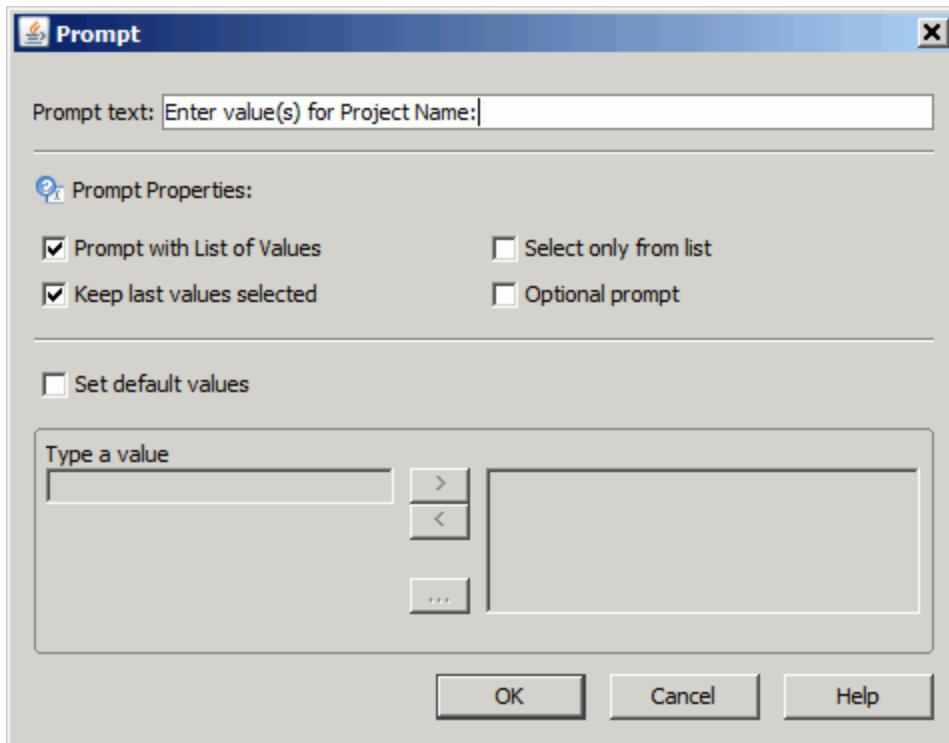
7. Drag the **Project Name** object to the **Result Objects** section on the right (top), and then drag the **Project Name** object to the **Query Filters** section on the right (bottom).



8. In the **Query Filters** panel, click the list button () at the right end of the **Project Name** box, and then select **Prompt**.

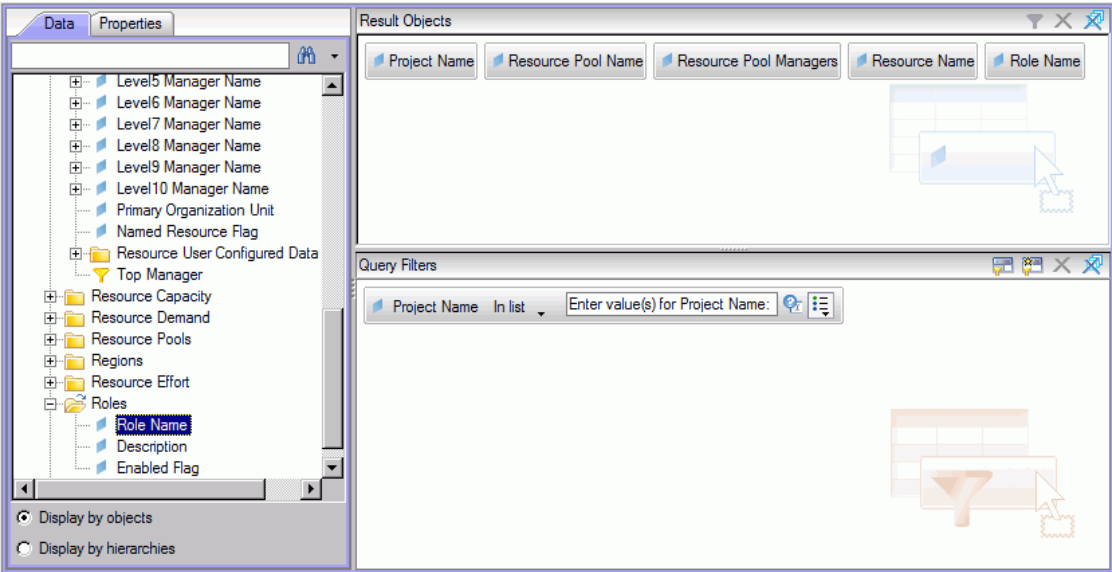


9. In the **Query Filters** panel, click the **Prompt Properties** button (?).



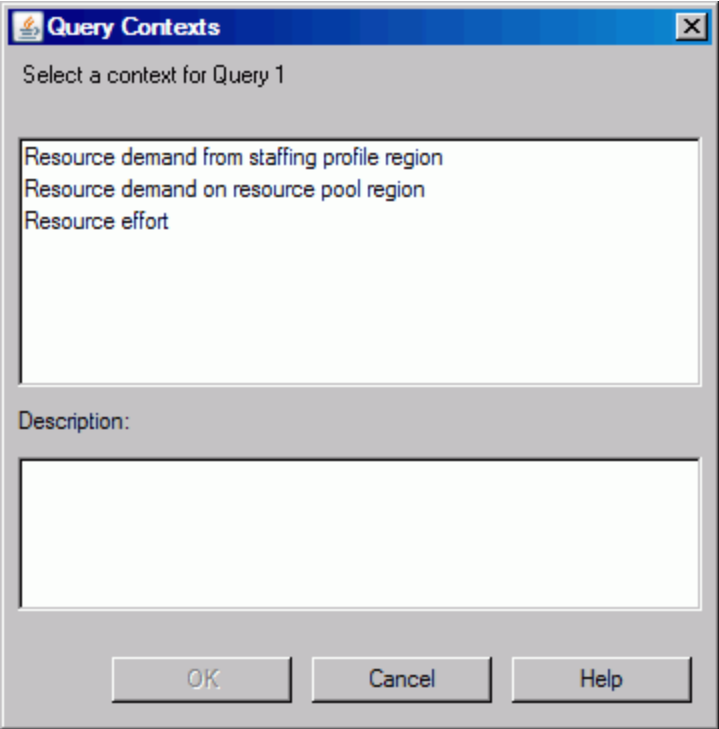
10. In the **Prompt Properties** section of the Prompt dialog box, select the **Select only from list** and **Optional prompt** check boxes.
11. Click **OK**.
12. Expand the **Resource Pools** class folder, and then drag the **Resource Pool Name** and **Resource Pool Managers** objects to the **Result Objects** section.
13. Expand the **Resources** class folder, and then drag the **Resource Name** object to the **Result Objects** section.

14. Expand the **Roles** class folder, and then drag the **Role Name** object to the **Result Objects** section.



15. Click **Run Query**.

The Query Contexts dialog box opens.



16. If, as in this case, the set of objects you select to construct your ad hoc report query can be retrieved through multiple join paths, InfoView prompts you to select a context for the query. (A context defines a join path.) Select the **Resource demand on resource pool region** context, and then click **OK**.

Note: To see how a context in the list affects report results, click the context name and read the content displayed in the **Description** box.

The Prompts dialog box opens.

17. Specify the projects to include in the report, and then click **Run Query**.

InfoView runs the report, which lists the resources and the resource pools assigned to the project.

18. Provide a title for the report.
19. Name and save the document.

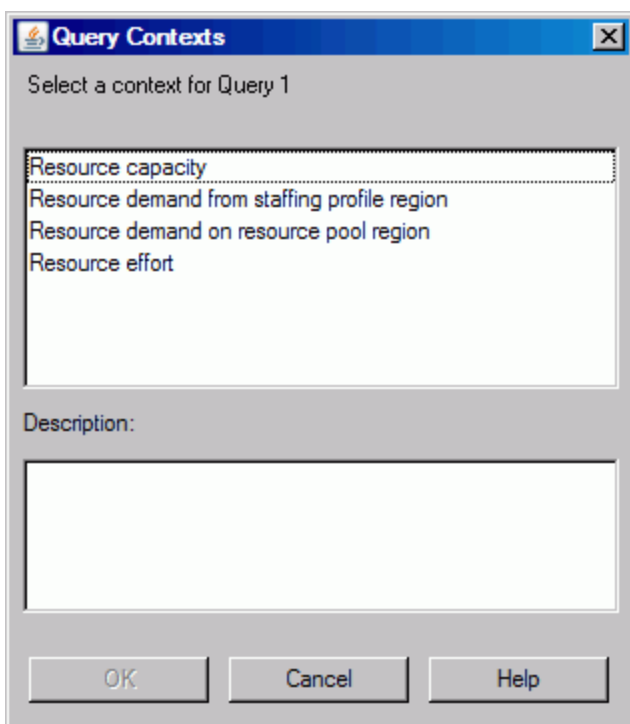
All Resources in a Resource Pool

You can create a simple report that lists all of the resources assigned to a resource pool. "[Table 4-5. RM Universe objects to include in a report that lists all resources in a resource pool](#)" below lists the RM Universe objects required to create this report, and shows where they belong in the New Web Intelligence Document page.

Table 4-5. RM Universe objects to include in a report that lists all resources in a resource pool

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|----------------|--------------------|--|
| Resources | Resource Name | |
| Resource Pools | Resource Pool Name | Resource Pool Name |

In this case, the set of objects you select to construct your ad hoc report query can be retrieved through multiple join paths, when you run the query, InfoView prompts you to select a context for the query.



Select the **Resource demand on resource pool region** context.

A resource assigned to a resource pool is only included in this report if the following are true:

- The resource has capacity data. When you run the query for this report, you must select a context to use with the query. Apply the "Resource capacity" context to the report query.

Note: Within the resource capacity query context, the report displays resource capacity data across resource pools, regions, roles, organization units, and fiscal time periods. The resource capacity context enables you to view data from a resource pool manager's perspective.

- The start date for the resource (Resources Start Date) and (or) the end date for the resource (Resources End Date) falls between the start and end dates of the Resource Management data loaded into the reporting schema.

Baseline Demand Vs. Active Staffing Profile Demand for a Project

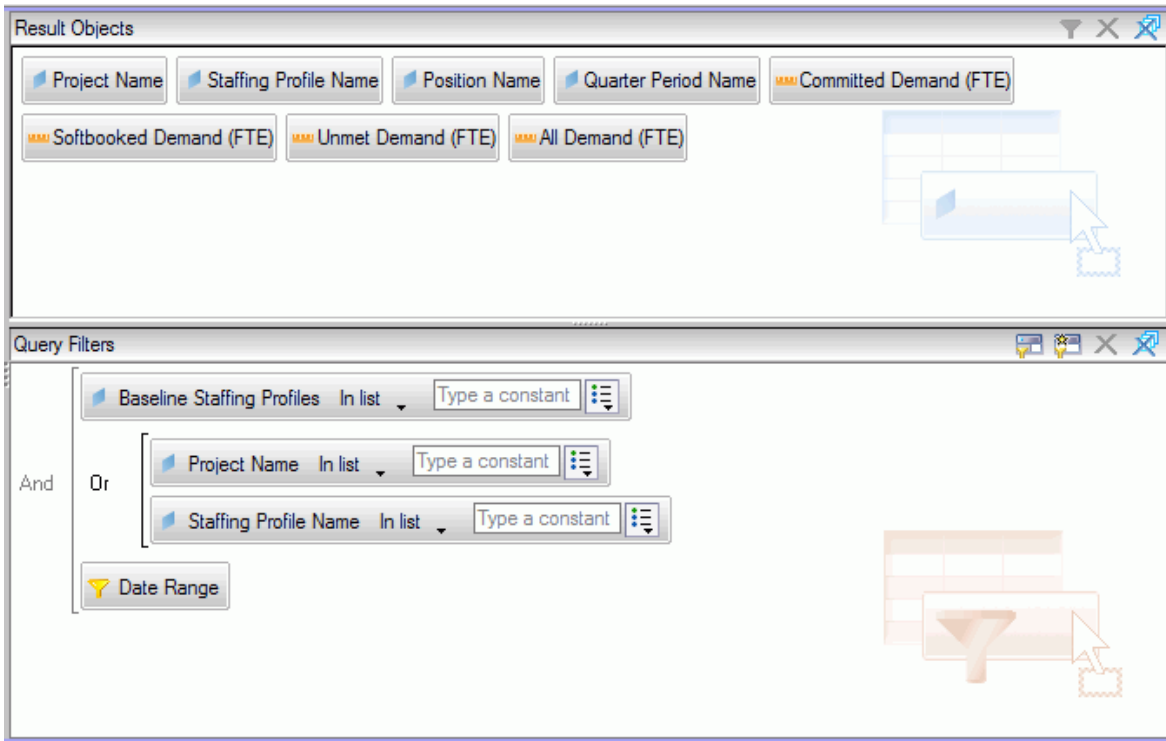
You can create a report that enables you to compare active staffing profiles with baseline staffing profiles for specific projects. ["Table 4-6. RM Universe objects for a report used to compare the baseline demand and active staffing profile demand for a project"](#) below lists the RM Universe objects that you to add to a Web intelligence document to create this report.

Table 4-6. RM Universe objects for a report used to compare the baseline demand and active staffing profile demand for a project

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|--|---|---|
| Project Information | Project Name | Project Name |
| Staffing Profiles | Staffing Profile Name | Baseline Staffing Profile Staffing Profile Name |
| Staffing Profiles > Positions (subclass) | Position Name | |
| Fiscal Periods | Quarter Period Name | Date Range / Begin Period, End Period, Time Granularity |
| Resource Demand > Demand (FTE) | Committed Demand (FTE) Softbooked Demand (FTE) Unmet Demand (FTE) All Demand (FTE) | |

Set the query filters as shown in ["Figure 4-1. Query filters for the ad hoc report Baseline Demand Vs. Active Staffing Profile Demand for a Project"](#) on the next page.

Figure 4-1. Query filters for the ad hoc report Baseline Demand Vs. Active Staffing Profile Demand for a Project



"[Creating an Ad Hoc Report on Resource Management Data: Example](#)" on page 68 provides an example of how to add these objects to the Web Intelligence document in InfoView.

Caution: If your fiscal year begins in a month other than January, and your report query specifies a time granularity of quarters, half years, or years, then make sure that the Begin Period month begins on the fiscal quarter, half year, or year, respectively. Otherwise invalid results are returned.

Demand, Capacity, and Actual Effort Report (Grouped by Primary Organizational Unit)

You can create a report that shows demand, capacity, and actual effort data for resources grouped by the primary organizational unit to which the resources belong. "[Table 4-7. RM Universe objects for a report used to show that shows demand, capacity, and actual effort data for resources grouped by primary organizational unit](#)" on the next page lists the RM Universe objects to use to create this report.

Table 4-7. RM Universe objects for a report used to show that shows demand, capacity, and actual effort data for resources grouped by primary organizational unit

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---|---------------------------|--|
| Resources | Primary Organization Unit | Primary Organization Unit / Prompt |
| Fiscal Periods | Month Period Name | Date Range |
| Resource Pools | Resource Pool Name | |
| Staffing Profiles | Staffing Profile Name | |
| Roles | Role Name | |
| Resource Capacity > Capacity (Hours) subclass | All Capacity (Hours) | |
| Resource Demand | | Exclude Demand from Baseline Staffing Profile Exclude Obsolete Demand from Proposal |
| Resource Demand > Demand (Hours) subclass | All Demand (Hours) | |
| Resource Effort | Effort (Hours) | |

Note: If you select specific primary organization units in the filter condition, unnamed capacity data are excluded from the results since unnamed resources do not belong to any organization units. If you do not select any specific primary organization units in filter condition, the report includes any unnamed capacity.

For an example of how to add the objects to the Web Intelligence document, see the procedure described in ["Creating an Ad Hoc Report on Resource Management Data: Example" on page 68.](#)

Total Demand Vs. Capacity Plus Additional Resource Pool Data

A resource pool manager can create a report that shows a comparison of demand and capacity for a resource pool with detailed resource pool information. ["Table 4-8. RM Universe objects to include in a report on demand, capacity, and actual effort, with data grouped by primary organizational unit" on the](#)

[next page](#) lists the RM universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 4-8. RM Universe objects to include in a report on demand, capacity, and actual effort, with data grouped by primary organizational unit

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|------------------------------------|--|--|
| Resource Pools | Resource Pool Name Resource Pool Managers Parent Resource Pool Parent Resource Pool Name1 | Resource Pool Name |
| Fiscal Periods | Year Period Name | Date Range |
| Roles | Role Name | |
| Resources | Resource Name | |
| Resource Capacity > Capacity (FTE) | All Capacity (FTE) Named Capacity (FTE) Unnamed Capacity (FTE) | |
| Resource Demand > Demand (FTE) | All Demand (FTE) Unmet Demand (FTE) Committed Demand (FTE) Softbooked Demand (FTE) | |

For an example of how to add the objects to the Web Intelligence document, see the procedure described in ["Creating an Ad Hoc Report on Resource Management Data: Example"](#) on page 68.

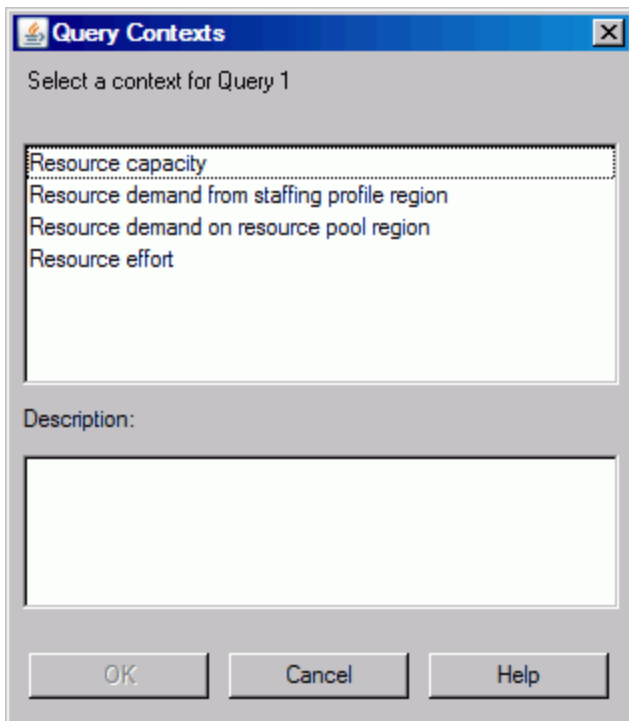
Resource Pools by Region

You can create a report that enables users to see which resource pools are associated with which regions. ["Table 4-9. RM Universe objects to include in a report on resource pools grouped by region"](#) on [the next page](#) lists the RM Derived Universe objects to use to create this report, and where to place them in InfoView.

Table 4-9. RM Universe objects to include in a report on resource pools grouped by region

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|----------------|--|--|
| Resource Pools | Resource Pool Name Resource Pool Managers | |
| Regions | Region Name | Region Name / In list / Prompt |
| Roles | Role Name | |

A resource assigned to a resource pool is only included in this report if the resource has capacity data. When you run the query, InfoView prompts you to select a context for the query.



Select the **Resource capacity** context.

All Resources by Resource Category

You can create a report that lists the resource pools and resources used to staff your projects. "[Table 4-10. RM Universe objects to include in a report on which resources in which resource categories are assigned to PPM Center projects](#)" on the next page lists the RM universe objects to use to create this report, and where to place them in InfoView.

Table 4-10. RM Universe objects to include in a report on which resources in which resource categories are assigned to PPM Center projects

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|--------------------|---|--|
| Resources | Resource Category Primary Organization Unit Resource Name Primary Role | Resource Category / Prompt |
| Resource Pool Name | Resource Pools | |

When you run this report query, InfoView prompts you to select a context for the report. Select **Resource capacity**.

For an example of how to create and run an ad hoc report for Resource Management, see "[Creating an Ad Hoc Report on Resource Management Data: Example](#)" on page 68.

All Assignments to Resource (by Staffing Profile) with Role, Showing All Effort

You can create a report that shows the resources (and roles) assigned to staffing profiles, the effort that these resources have logged, and the demand that each of the staffing profiles requested of the resources. A resource manager or project manager can use this report to compare the actual effort a resource has made with what a staffing profile originally requested. "[Table 4-11. RM Universe objects to include in a report on which resources are assigned to which staffing profiles and the effort the resources have logged](#)" below lists the RM Universe objects required to create this report, and shows where they belong in the New Web Intelligence Document page.

Table 4-11. RM Universe objects to include in a report on which resources are assigned to which staffing profiles and the effort the resources have logged

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-------------------|----------------------------|--|
| Staffing Profiles | Staffing Profile Name | |
| Resources | Resource Name User Name | |
| Resource Demand | | Exclude Obsolete Demand from Proposal |

Table 4-11. RM Universe objects to include in a report on which resources are assigned to which staffing profiles and the effort the resources have logged, continued

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|----------------------------------|----------------------------------|--|
| Resource Demand > Demand (Hours) | All Demand (Hours) | |
| Resource Effort | Effort (Hours) | |
| Fiscal Periods | <Period> Name | Date Range |
| Roles | Role Name | |
| Project Information | Project Name | |
| Request Information | Source Entity Type Request ID | |

You can tailor this report to show only the actual effort that resources have logged. If you do, however, keep in mind that if your query does not contain demand information, then the report results exclude resources who have not logged time during the time period you specify for the query. This means that you cannot see *all* of the resources assigned to the staffing profile.

Note: Actual effort can be associated with the staffing profile level only if time is logged against a project or a Portfolio Management request (which is associated with staffing profiles), but *not* to the position level. This means that when you perform an ad hoc query, you can associate actual effort with staffing profile attributes only, and not positions attributes.

Staffing Profile Details for Resources

You can create a report that displays staffing profile details for resources. This report would list resources along with their start and end dates, role requested, org unit, resource pool, manager, and the primary role each resource assumes in the organization. "[Table 4-12. RM Universe objects to include in a report on which resources in which resource pools are assigned to a PPM Center project](#)" below lists the RM universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 4-12. RM Universe objects to include in a report on which resources in which resource pools are assigned to a PPM Center project

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-------------------|-----------------------|--|
| Staffing Profiles | Staffing Profile Name | Staffing Profile Name / Prompt |

Table 4-12. RM Universe objects to include in a report on which resources in which resource pools are assigned to a PPM Center project, continued

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|----------------|--|--|
| | Start Date Finish Date | |
| Roles | Role Name | |
| Resources | Primary Organization Unit Manager Name Resource Name | |
| Resource Pools | Resource Pool Name | |

When you run this report query, you are prompted to select a context for the report. Select **Resource demand on resource pool region** for this report.

For information about how to add the objects to a new Web Intelligence document, see the procedure described in ["Creating an Ad Hoc Report on Resource Management Data: Example" on page 68](#).

Reporting on HP Time Management

This chapter addresses Operational Reporting for HP Time Management. It provides information about the preconfigured Time Sheet Compliance report that HP supplies and some of the many ad hoc reports that you can create for your HP Time Management data.

Time Sheet Compliance Report

HP provides the Time Sheet Compliance report for HP Time Management with the Operational Reporting solution. This report enables you to continuously monitor time entry compliance across your entire organization and to identify organizational units and resources that are out of compliance. You can monitor time compliance company-wide, without having to delve into tedious details. Summarized data provide an overview of time compliance within the context of management chains, organizational units, or resource pools.

The Time Sheet Compliance report displays the total number of time sheets logged, submitted (or not), approved on time (or not), as well as trends in compliance over specified time periods. If you need additional information, you can use drill-down functionality to see the details of time compliance at each level of the management chain, organization unit and resource pool.

This section provides information about the required and optional prompts for the Time Sheet Compliance report query, and descriptions of the displayed report results.

Note: For information about how to create new Web Intelligence report documents to report on your HP Time Management data, see ["Ad Hoc Reports for HP Time Management"](#) on page 91.

Time Sheet Compliance Report Query Information

"[Figure 5-1. Prompt dialog box for the Time Sheet Compliance Report](#)" below shows the Prompt dialog box for the Time Sheet Compliance Report. "[Table 5-1. Prompts for the Time Sheet Compliance Report query](#)" on the next page lists descriptions of the information to provide for the query.

Figure 5-1. Prompt dialog box for the Time Sheet Compliance Report

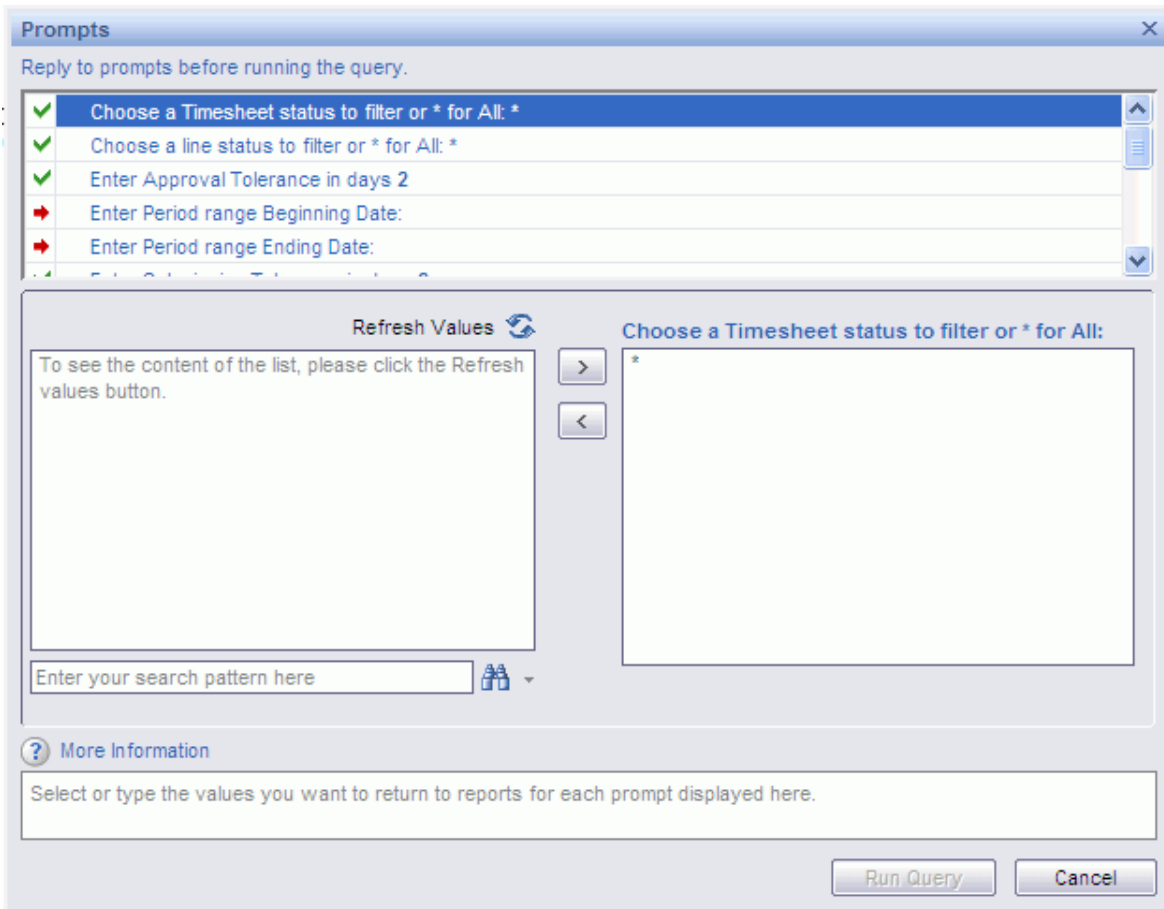


Table 5-1. Prompts for the Time Sheet Compliance Report query

| Prompt * Value Required | Description |
|--|--|
| *Period Range Beginning Date | Determines the start date of the date interval for data displayed in the report. If the end date of a period falls between the period range beginning and end dates, then data for that the period are included in the report. |
| *Period Range Ending Date | Determines the end date of the date interval for data displayed in the report. If the end date of a period falls between the period range beginning and ending dates, then data for that the period are included in the report. |
| *Time Sheet Line Status(es) | Determines whether the report displays data for all time sheet lines, regardless of line status, or only for time sheet lines that have a specific status. Select one of the following values: <ul style="list-style-type: none"> • * (default) • Unsubmitted • Submitted • Approved • Rejected • Frozen • Closed |
| *Time Sheet Status(es) | Determines whether the report displays data for all time sheets, regardless of line status, or only for time sheets that have a specific status. Select one of the following values: <ul style="list-style-type: none"> • * (default) • Unsubmitted |

Table 5-1. Prompts for the Time Sheet Compliance Report query, continued

| Prompt * Value Required | Description |
|--|--|
| | <ul style="list-style-type: none"> • Pending Approval • In Rework • Approved • Frozen • Closed • Missing <p>Note: Although "Missing" is not a valid status for PPM Center time sheets, in operational reports, it represents time sheets that have no assigned status.</p> |
| * Tolerance for Approval (days) | Number of days after the period end date after which the time sheet cannot be approved as compliant. |
| * Tolerance for Submission (days) | Number of days after the period end date after which the time sheet cannot be submitted as compliant. |
| * Top Org Unit | Filter report data based on a selected organizational unit. The report returns all of the data that fall below the organizational unit in the hierarchy. |
| Request Type Name(s) | (Optional) Filters report data based on one or more selected request types. |
| Project Name(s) | (Optional) Filters report data based on one or more selected projects. |
| Location Code(s) | (Optional) Filter report data based on one or more selected locations. |
| Resource Category(s) | (Optional) Filter report data based on one or more selected resource categories. |
| Department(s) | (Optional) Filter report data based on one or more selected departments. |
| Company(s) | (Optional) Filter report data based on one or more selected companies. |

Table 5-1. Prompts for the Time Sheet Compliance Report query, continued

| Prompt | Description |
|------------------|--|
| * Value Required | |
| Charge Code(s) | (Optional) Filter report data based on a selected charge code. |

Caution: The Time Sheet Compliance report includes timesheets for the resource pool to which a resource currently belongs. This is true even if the timesheets are for a future or past time period and the resource is associated with a different resource pool for that time period.

Time Sheet Compliance Report Results

The following sections provide descriptions of the Time Sheet Compliance Report results as they appear on the different report tabs.

Note: If, in the past, you purged time-sheet data from the audit events table in an effort to improve performance, that data is no longer available for reporting and is not included in the Time Sheet Compliance Report results.

Direct Manager Tab

The **Direct Manager** tab shows submission and approval compliance data grouped by manager hierarchy and resource category. The manager hierarchy in the report is shown from the top, up to three levels deep. The query used to generate the report includes up to ten hierarchy levels. This can be useful in data filtering.

"[Table 5-2. Columns on the Direct Manager tab of the Time Sheet Compliance Report](#)" below lists descriptions of the columns displayed on the **Direct Manager** tab of the Time Sheet Compliance Report.

Table 5-2. Columns on the Direct Manager tab of the Time Sheet Compliance Report

| Column Heading | Description |
|-----------------------------|---|
| Manager Hierarchy - Level 1 | Top-level manager in the management hierarchy |
| Manager Hierarchy - Level 2 | Second-level manager from the top in the management hierarchy |
| Manager Hierarchy - Level 3 | Third-level manager from the top in the management hierarchy |

Table 5-2. Columns on the Direct Manager tab of the Time Sheet Compliance Report, continued

| Column Heading | Description |
|--|--|
| Resource - Direct Manager | Direct manager or the lowest-level manager for the resource. |
| Resource - Category | Category to which the resource belongs |
| Time Sheet Compliance - Expected Total Time Sheets | Number of time sheets that must be submitted for compliance |
| Submissions - Total | Total number of submitted time sheets |
| Submissions - Compliant | Total number of compliant time sheets submitted |
| Submissions - % Compliance | Total percentage of submitted time sheets that are compliant |
| Approvals - Total | Total number of submitted time sheets that were approved |
| Approvals - Compliant | Total number of time sheets that were compliant for approval |
| Approvals - % Compliance | Approval compliance percentage |

To see detailed information about a specific resource manager, click the hyperlinked name for the manager. The Resource Information Report opens in a new web browser window and displays the manager's name, department, location, category, company, role name, and direct manager.

Org Unit Tab

The **Org Unit** tab displays submission and approval compliance data grouped based on the org unit hierarchy and the resource category. The org unit hierarchy in the report is shown from the top up to three levels deep. The query used to generate the report includes up to ten hierarchy levels, which can be useful in filtering data.

"[Table 5-3. Columns on the Org Unit tab of the Time sheet Compliance Report](#)" below lists descriptions of the columns displayed on the **Org Unit** tab of the Time Sheet Compliance Report.

Table 5-3. Columns on the Org Unit tab of the Time sheet Compliance Report

| Column Heading | Description |
|------------------------------|--|
| Org Unit Hierarchy - Level 1 | Top org unit in the org unit hierarchy |

Table 5-3. Columns on the Org Unit tab of the Time sheet Compliance Report, continued

| Column Heading | Description |
|--|--|
| Org Unit Hierarchy - Level 2 | Second org unit from the top of the org unit hierarchy |
| Org Unit Hierarchy - Level 3 | Third org unit from the top of the org unit hierarchy |
| Resource - Direct Manager | Direct, or lowest-level manager for the resource |
| Resource - Category | Category to which the resource belongs |
| Time Sheet Compliance - Expected Total Time Sheets | Number of time sheets that must be submitted for compliance |
| Submissions - Total | Total number of submitted time sheets |
| Submissions - Compliant | Total number of submitted time sheets that were compliant |
| Submissions - % Compliance | Submission compliance percentage |
| Approvals - Total | Total number of time sheets that were approved |
| Approvals - Compliant | Total number of time sheets that were compliant for approval |
| Approvals - % Compliance | Approval compliance percentage |

The **Org Unit** tab shows group totals for the org unit and for three levels of org units, starting at the top of the management hierarchy. To see detailed information about a specific org unit, click the hyperlinked name of the org unit. The Organization Unit Information Report opens in a new web browser window and displays the org unit's name, department, location, category, and the org unit manager's ID.

Resource Pool Tab

The **Resource Pool** tab displays submission and approval compliance data grouped based on the resource pool hierarchy. The resource pool hierarchy in the report is shown from the top to three levels deep. The query used to generate the report includes up to ten hierarchy levels, which can be useful in filtering data.

"[Table 5-4. Columns on the Resource Pool tab of the Time Sheet Compliance Report](#)" below lists descriptions of the columns displayed on the **Resource Pool** tab of the Time Sheet Compliance Report.

Table 5-4. Columns on the Resource Pool tab of the Time Sheet Compliance Report

| Column Heading | Description |
|--|--|
| Resource Pool Hierarchy - Level 1 | Top resource pool in the resource pool hierarchy |
| Resource Pool Hierarchy - Level 2 | Second resource pool from the top of the resource pool hierarchy |
| Resource Pool Hierarchy - Level 3 | Third resource pool from the top of the resource pool hierarchy |
| Resource - Resource Pool | Resource pool to which the resource belongs |
| Resource - Category | Category to which the resource belongs |
| Time Sheet Compliance - Expected Total Time Sheets | Number of time sheets that must be submitted for compliance |
| Submissions - Total | Total number of submitted time sheets |
| Submissions - Compliant | Total number of submitted time sheets that were compliant |
| Submissions - % Compliance | Submission compliance percentage What does this mean? |
| Approvals - Total | Total number of time sheets that were approved |
| Approvals - Compliant | Total number of time sheets that were compliant for approval |
| Approvals - % Compliance | Approval compliance percentage What does this mean? |

To see a report that contains additional details about the manager of the resource, click the hyperlinked manager name. The Resource Information Report opens in a new browser window and displays the manager's name, resource category, location, department, company, direct manager, role and email address.

The time sheets for resources who participate in multiple resource pools are counted against each resource pool.

Caution: The Time Sheet Compliance report includes time sheets for the resource pool to which a resource *currently* belongs. This is true even if the time sheets are for a future or past time period and the resource is associated with a different resource pool for that time period. As a result, the Time Sheet Compliance Report may exclude some resource pools. For example, if a resource was assigned to a different resource pool in the past, that resource pool is not included in the Time Sheet Compliance Report.

Ad Hoc Reports for HP Time Management

The following sections provide information about the operational reports that you can create for HP Time Management, and includes examples on how to create a few of these reports. These sections also provides information about the contexts available for the reports, and includes guidance on how to use PPM Center universe objects in operational report queries.

Contexts for Ad Hoc Reports for HP Time Management

When you create an ad hoc report for Resource Management, InfoView may prompt you to select a context for your report query. A context consists of a set of well-defined joins that create a unique query path involving multiple dimensions and facts.

If the multiple facts and measures in a reporting universe are related to a common set of dimensions, the joins between multiple facts and the related dimensions result in a loop. By providing separate contexts for each fact and the related dimensions, the loop is eliminated, so that you can query multiple facts across a set of common dimensions.

Operational Reporting provides the following contexts for the ad hoc reports you create for HP Time Management data:

- Time Sheet Compliance context

The "Time Sheet Compliance" context enables you to query for compliance measures such as Required Time Sheets, Compliant Submissions, Compliant Approvals, Total Submissions, Total Approvals, Submission Percent, and Approval Percent. In this context, the resource pool is joined through the resource table for compliance measures.

Note: The resource pool is joined through the resource table for compliance measures because no actuals exist for missing time sheets. To get the right compliance measures for the resource pools, the join with resource table is used.

- Time Sheet Actuals context

The Time Sheet Actuals context enables you to query actuals measures such as Total Effort and Total Cost. In this context, the resource pool is directly joined with the actuals fact table for the Time Sheet actuals.

Best Practices for Reporting on HP Time Management Data

This section provides recommendations for getting the best results in the ad hoc operational reports you create for your HP Time Management data.

Reporting on Multiple Work Item Types

If you generate a report that includes a work item type object (such as Project, Request, or Miscellaneous object) from the Time Sheet Lines class, the report results includes only the numbers for that specific work item type. If you generate a report that includes more than one specific work item type object, no data are returned. For example, if you create and run a report that contains both the Project object and the Request object, no data are returned because no time-sheet line logs time against both types of work items. To see the results for different work item types, you must use the Work Item Type and Work Item Type Name objects instead of the individual objects such as Project, Request, or Miscellaneous.

Avoiding Inaccurate Data Display Resulting from Summing of Measures

Measures in TM Derived Universe are defined at a time-sheet level. This means that if you create a report that shows data from the time-sheet line level, and you then remove the time-sheet line attributes from the report display (but not from the report query), the BusinessObjects sums (collapses) the measures.

The summing of measures results in inaccurate reports and the data displayed are different than the data specified in the query. In such cases, when you build the report, remove attributes that are not needed for the display from the column selections so that the query does not use them.

Reporting on Compliance Measures

You cannot report on the compliance measures for fiscal periods. Compliance measures are only supported with HP Time Management periods.

Roles and Regions

Neither roles nor regions are supported for any measures in HP Time Management.

Aggregate Values and Percentages

Because percentages cannot be aggregated, the aggregation function is not applied to the Submission Percent and Approval Percent measures. If you include the Submission Percent and Approval Percent objects in a query, BusinessObjects does not aggregate the values at higher levels in the report. For example, if you query for Organization, Manager, and Submission Percent, you do not see the aggregate compliance percentage at the organization level. If you want to see aggregate values at different levels, you must use the Compliant Submissions and Required Timesheets objects and compute the percentage in the report. (See the HP-supplied Time Sheet Compliance report for this usage.)

Using Filters to Limit Report Output

Because BusinessObjects analyzes only a fixed number of rows (the default is 5000), make sure that you including appropriate filters to limit report output.

Comparing the Role of a Position and the Role of a Resource Assigned to the Position

In creating a query that compares the role of a position with the actual role of a resource assigned to that position, you must do the following:

- Select the Role Name object (Roles class) for the role of the position
- Select the Primary Role object (Resources class) for the role of the resource
- Select either the "Resource Demand from Staffing Pool Region" context or the "Resource Demand on Resource Pool Region" context.

Querying Against Large Datasets

By default, queries time out after running for ten minutes. If you have selected query filters that retrieve a large volume of data, your query may time out and fail to return report results. To prevent this from occurring, do one or both of the following:

- Modify the universe parameters (on the **Controls** tab of the Universe Parameters dialog box) to increase the execution time limit.
- Modify the query filters to retrieve a smaller dataset.

Creating Ad Hoc Reports for HP Time Management

The TM Derived Universe delivered with PPM Center includes classes and objects that enable you to create your own operational reports for HP Time Management data. The following are just some of the ad hoc reports that you can create for your HP Time Management data:

- ["Delinquent Time Sheets" on the next page](#)
- ["Trends in Late Time-Sheet Submission" on page 100](#)
- ["Trends in Time-Sheet Processing" on page 101](#)
- ["Tracking Billable Time Logged for a Project" on page 102](#)
- ["Resources' Work in Progress" on page 102](#)

Note: If, in the past, you purged time-sheet data from the audit events table in an effort to improve performance, that data is no longer available for reporting and is not included in the ad hoc reports for HP Time Management data.

Example Ad Hoc Report for HP Time Management Data

This section provides detailed instructions for creating a query for a report on HP Time Management data.

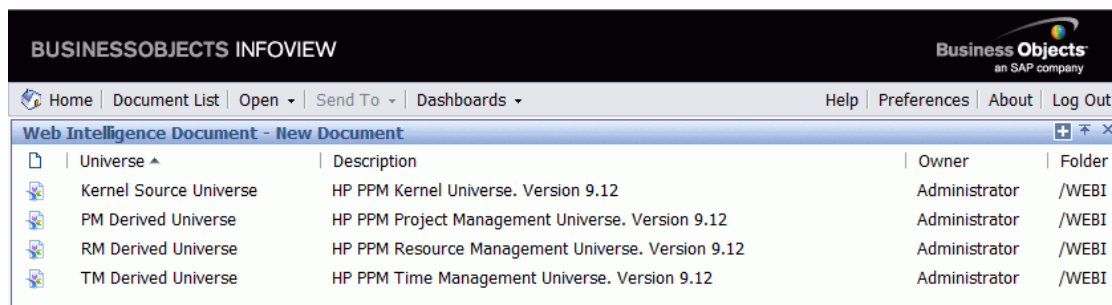
Delinquent Time Sheets

A product manager who needs to know who is not submitting their time sheets can create a report that enables her to see which resources, working for which project managers, have not submitted a time sheet for a given time period. This simple, tabular report shows the number of late submissions by period, for a given time range. Data are grouped based on the name of the manager for the resources.

Note: The following example includes very basic steps required to create and run this report query. For detailed information about creating Web Intelligence documents, see the *BusinessObjects Enterprise InfoView User's Guide*.

To create a report that shows which resources have not yet logged a time sheet for the current period:

1. Log on to InfoView.
2. In the **Navigate** section of the InfoView home page, click **Document List**.
3. From the **New** menu, select **Web Intelligence Document**.

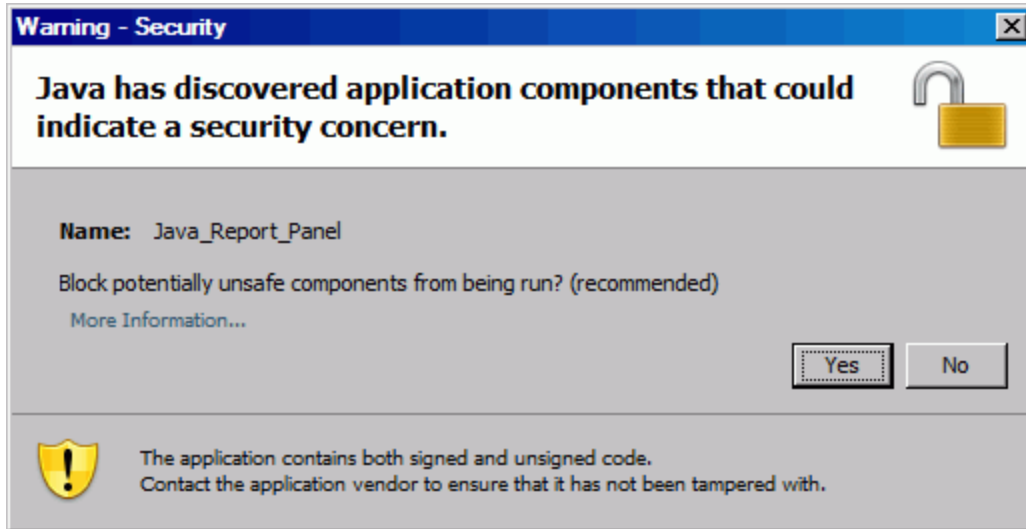


The screenshot shows the BusinessObjects InfoView interface. At the top, there is a navigation bar with the following items: Home, Document List, Open, Send To, Dashboards, Help, Preferences, About, and Log Out. Below the navigation bar, there is a section titled "Web Intelligence Document - New Document". This section contains a table with the following columns: Universe, Description, Owner, and Folder. The table lists four universes: Kernel Source Universe, PM Derived Universe, RM Derived Universe, and TM Derived Universe. Each universe is owned by the Administrator and is located in the /WEBI folder.

| Universe | Description | Owner | Folder |
|------------------------|---|---------------|--------|
| Kernel Source Universe | HP PPM Kernel Universe. Version 9.12 | Administrator | /WEBI |
| PM Derived Universe | HP PPM Project Management Universe. Version 9.12 | Administrator | /WEBI |
| RM Derived Universe | HP PPM Resource Management Universe. Version 9.12 | Administrator | /WEBI |
| TM Derived Universe | HP PPM Time Management Universe. Version 9.12 | Administrator | /WEBI |

4. From the list of available universes, select **TM Derived Universe**.

5. A Warning - Security dialog box opens to advise you of a security concern related to Java application components and to allow you to block potentially unsafe components. Click **No**.

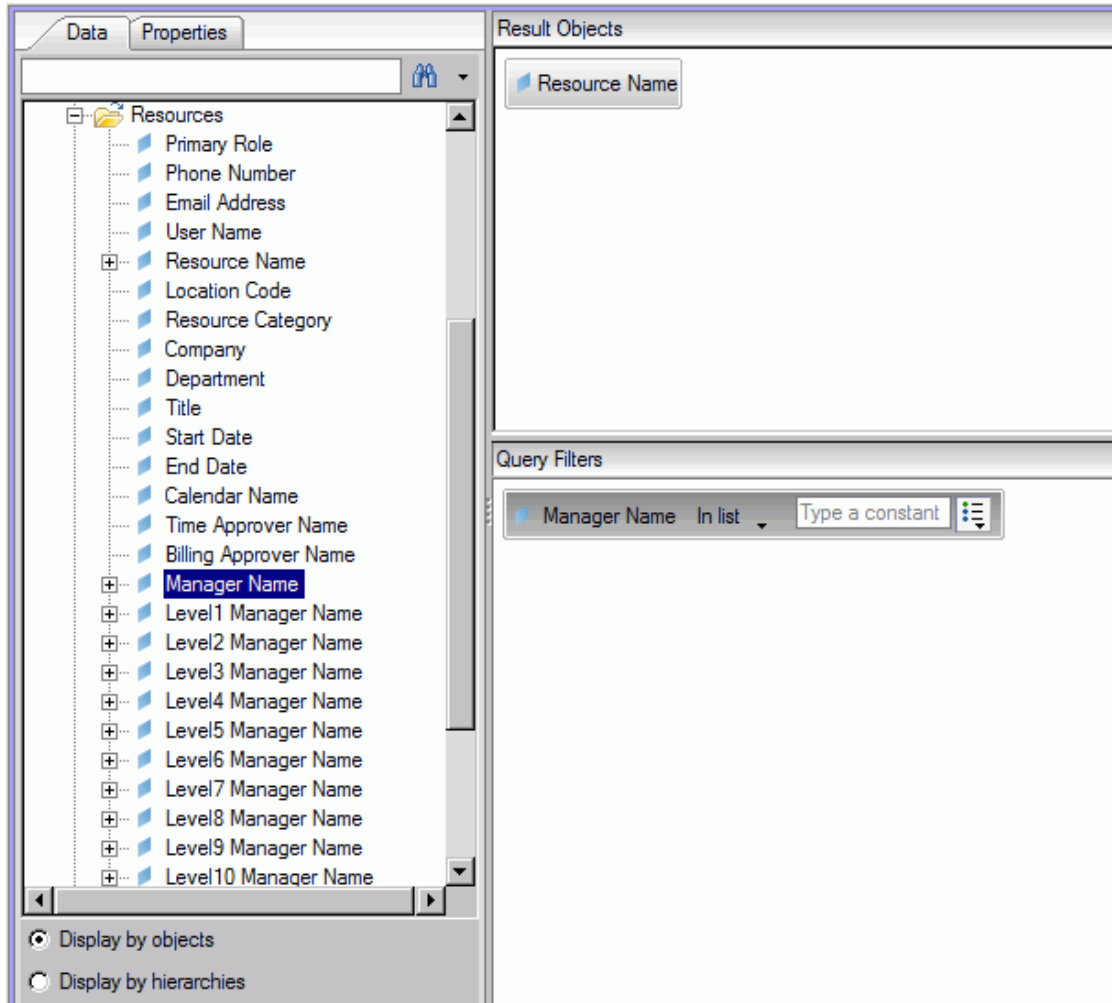


The **Data** tab in the left pane lists all of the available classes and objects in the TM Derived Universe.

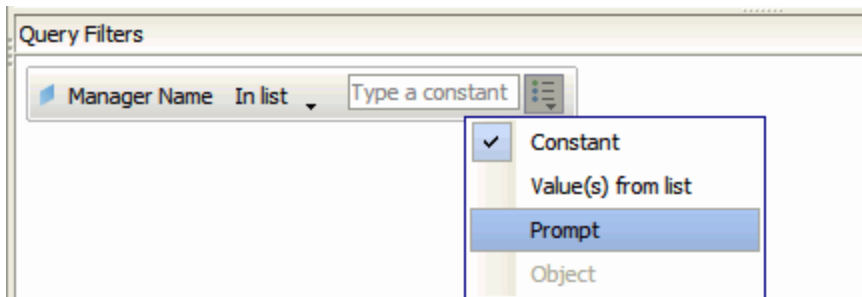
Note: The folders and objects visible in the document list depend on the account you logged on to, the rights that your BusinessObjects Enterprise administrator granted to you, and the settings that you and your administrator enable.

6. Expand the **Resources** class folder.
7. Drag the **Resource Name** object from the **Resources** class folder to the **Result Objects** panel on the right (top).

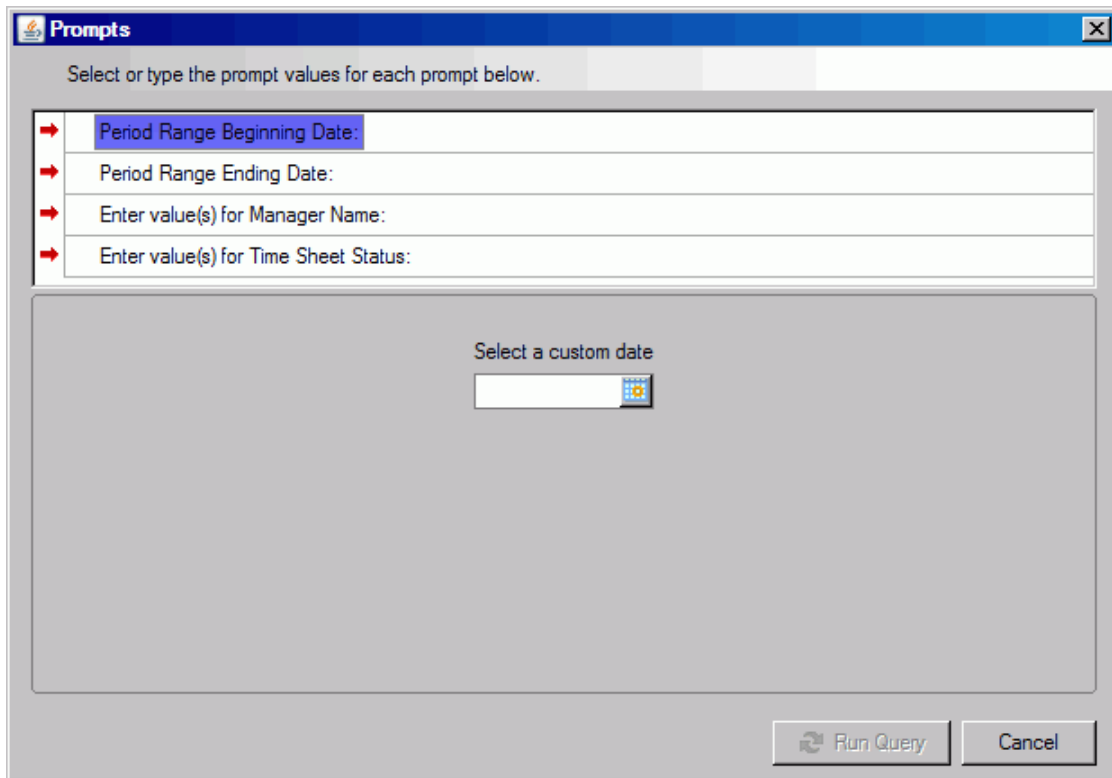
8. Drag the **Manager Name** object from the **Resources** class folder to the **Query Filters** panel on the right (bottom).



9. In the **Query Filters** panel, click the list button in the **Manager Name** box (right end), and select **Prompt** from the list.



The Prompts dialog box opens.




17. To specify the date range for the report:
 - a. Click **Period Range Beginning Date**, and then use the **Select a custom date** multiselect control to select the beginning date for report data.
 - b. Click **Period Range Ending Date**, and then use the **Select a custom date** multiselect control to select the end date for report data.
18. To select the names of one or more managers:
 - a. Click **Enter value(s) for Manager Name**.
 - b. In the **Manager Name** list, select the name of one or more managers, and then click the right-pointing arrow to add the selection to the box on the right.
19. Click **Enter value(s) for Time Sheet Status**, and then from the list of time sheet statuses, select the following values:

- **Unsubmitted**
- **In Rework**

20. At the bottom of the Prompts dialog box, click **Run Query**.

InfoView runs the report, which lists the resource names and the period names for which the resources have not submitted time sheets.

21. On the report results page, double-click **Report Title**, type a name for the report in the now enabled text box, and then press enter .

22. On the toolbar, click **Save** .

23. Name and save the document.

Additional Ad Hoc Reports for HP Time Management Data

The following sections describe additional queries that you can construct to create operational reports for HP Time Management.

Trends in Late Time-Sheet Submission

You can create a report that enables you to uncover trends in late time-sheet submissions based on who manages the resources, and the teams, organizational units, or departments to which the resources belong. "[Table 5-5. TM Derived Universe objects to include in a report on trends in late time-sheet submission](#)" below shows the TM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

Table 5-5. TM Derived Universe objects to include in a report on trends in late time-sheet submission

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---------------------|---|---|
| Compliance Measures | <ul style="list-style-type: none"> • Compliant Submission • Submission Percent • Total Submissions | |
| Resources | <ul style="list-style-type: none"> • User Name • Manager Name | <ul style="list-style-type: none"> • Manager Name / equal to • Primary Organization Unit / equal to |

Table 5-5. TM Derived Universe objects to include in a report on trends in late time-sheet submission, continued

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-------------------------|---|---|
| | <ul style="list-style-type: none"> Primary Organization Unit Department | <ul style="list-style-type: none"> Department / equal to |
| Time Management Periods | Which Period Date Range? | Which Period Date Range? |

For an example of how to add objects to a new Web Intelligence document, see ["Example Ad Hoc Report for HP Time Management Data" on page 94](#).

After you create the Web Intelligence document, run the report and then verify the results. You can augment this report with additional information such as actuals and time periods data. You can also experiment with different ways of displaying results by grouping data based on resource name, department, manager, or organization units. Once the report contains all of the data you want and is organized the way you want it, you can save the report in Excel or PDF format.

Trends in Time-Sheet Processing

If you are a PPM Center project manager responsible for HP Time Management, you can create a report that enables you to detect trends in time-sheet processing. You can configure this report to show differences between the following:

- Time-sheet submissions and time-sheet approval, based on group.
- End of the reporting period and time-sheet approval, based on group.
- Time-sheet rework and time-sheet approval, based on group.
- End of the reporting period and close of the reporting period, based on group.

You can also create a report on time-sheet rejection rate that shows the number of time sheets rejected (time sheets that required re-work), the resources whose time sheets were rejected multiple times, and so on, based on group.

For an example of how to add TM Derived Universe objects to a new Web Intelligence document, see ["Example Ad Hoc Report for HP Time Management Data" on page 94](#).

Tracking Billable Time Logged for a Project

If you are a project manager concerned who needs to monitor the billable time your consultants log, you can create a report that shows billable time logged for a project during a given period, and includes activity codes and charge codes. "Table 5-6. TM Derived Universe objects to include in a report on billable time" below shows the TM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

Table 5-6. TM Derived Universe objects to include in a report on billable time

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-------------------------|-----------------------------|--|
| Time Sheet Lines | Item Name Item Set Name | |
| Resources | User Name Manager Name | Manager Name / Equal to |
| Time Management Periods | Time Management Period Name | Which Period Date Range? |
| Time Sheet Actuals | Total Effort (Hrs) | |

The resulting report shows all of the work items for which your resources have logged time and actual effort.

For an example of how to add TM Derived Universe objects to a new Web Intelligence document, see "Example Ad Hoc Report for HP Time Management Data" on page 94.

Resources' Work in Progress

If you are a resources manager who needs to know what each of your direct reports is working on, you can create a report that shows you what your resources have been involved in (projects, requests, vacation, and so on) over a specified time period. "Table 5-7. TM Derived Universe objects to include in a report on resources' work in progress" on the next page shows the TM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

Table 5-7. TM Derived Universe objects to include in a report on resources' work in progress

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-------------------------|--|--|
| Time Sheet Lines | <ul style="list-style-type: none"> • Item Name • Item Set Name | |
| Resources | <ul style="list-style-type: none"> • User Name • Manager Name | Manager Name / Equal to |
| Time Management Periods | Time Management Period Name | Which Period Date Range? |
| Time Sheet Actuals | Total Effort (Hrs) | |

The resulting report displays all work items for which your resources have logged time and actual effort. You can include additional information such as request types, packages and so on, in your report query.

Issues to Consider in Creating Queries for HP Time Management Reports

This section addresses issues to keep in mind as you construct queries with operational reports on HP Time Management data. It includes multiple references to objects in the TM Derived Universe of classes and objects used for reporting on HP Time Management.

Reporting on Financial Management

- ["About this Chapter" below](#)
- ["Financial Summary Report" below](#)
- ["Ad Hoc Reports for Financial Management" on page 108](#)

About this Chapter

This chapter addresses Operational Reporting for Resource Management. It provides information about the preconfigured Financial Summary report, which HP supplies, and some of the many ad hoc reports that you can create for your Financial Management data.

Note: If your organization has multilingual Operational Reporting enabled, make sure that you configure InfoView to display your operational report data correctly for your locale. For instructions, see ["Using BusinessObjects for Operational Reports" on page 16](#).

Financial Summary Report

You can use the Financial Summary report that HP supplies with Operational Reporting to monitor ongoing efforts and to generate information that you can use for financial forecasting. PPM Center provides portfolio scenarios that can help Finance Managers project future scenarios that can be directly compared against each other and the ongoing efforts using the Financial Management report.

The HP PPM Financial Summary Report enables you to view a comparison of the planned values with the actual values for a budget, along with all of the budget-related attributes. You can group budget information based on region, business objective, or budget type (the entity for which the budget was created).

Budget values can be analyzed based on expense type or labor type. Budgets costs can be viewed in the defined local currency of the PPM Center system or any other currency based on the filter criteria.

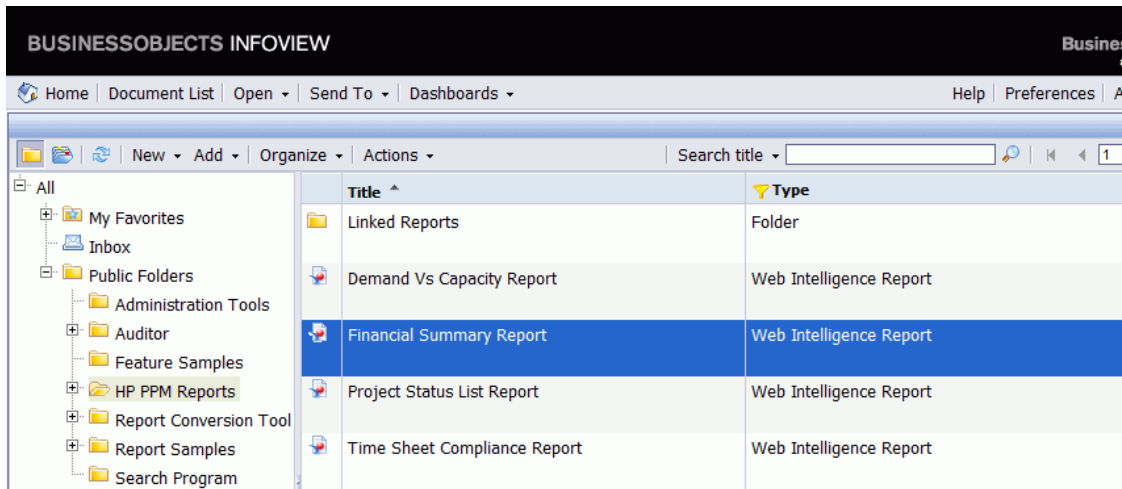
Running the Financial Summary Report

To run the Financial Summary Report, do the following:

1. Open a web browser window and log on to InfoView.
2. In the **Navigate** section or in the header panel of the InfoView home page, click **Document List**.

Note: The folders and objects visible in the document list vary, depending on the account you logged on to, the rights that your BusinessObjects Enterprise administrator granted to you, and the settings that you and your administrator enable.

3. In the Tree panel in the left portion of the page, expand the **Public Folders** folder, and then select **HP PPM Reports**.



4. In the panel to the right, double-click **Financial Summary Report**.

The Prompts dialog box lists the prompts that are available for the report query. All prompts for which values are required have default values, but you can change these values, and specify values for any or all of the optional prompts listed.

Note: A green check mark (✓) to the left of a listed prompt indicates that a value has been specified for the prompt. A red arrow (→) to the left of a listed prompt indicates that the

prompt is required and you must specify a value for it before you can run the report query.

- To filter the data further, before you run the report, provide information for the prompts listed and described in the following table.

Note: If you do not specify a value for a prompt, the filter is not applied to report data.

| Prompt | Description |
|-------------------|---|
| *Required | |
| *Begin Period | From the list of all fiscal periods configured for PPM Center, select the starting period for data to include in the report. |
| *End Period | From the list of all fiscal periods configured for PPM Center, select the end period for data to include in the report. |
| *Multiply Factor | From the listed factors, select one of the following: <ul style="list-style-type: none"> ○ 1 ○ 1,000 ○ 1,000,000 |
| *Primary Group By | Determines the primary grouping for data in the report. Select one of the following values: <ul style="list-style-type: none"> ○ Region ○ Financial Summary Type ○ Business Unit ○ Business Objective |
| *Report Currency | From the list, select one of the following to determine base the currency associated with financial summary on the default currency for PPM Center (base) or the local currency. <ul style="list-style-type: none"> ○ Base ○ Local |

| Prompt | |
|-------------------------|---|
| * Required | Description |
| *Secondary Group By | Determines the secondary grouping category for data in the report. Select one of the following values: <ul style="list-style-type: none"> ○ Expense Type ○ Labor Type |
| *Time Granularity | Determines the time interval for data displayed in the report. Select one of the following values: <ul style="list-style-type: none"> ○ Year displays time periods as yyyy ○ Half Year displays time periods as h1 or h2/yyyy ○ Quarter displays time periods as quarter/yyyy ○ Month displays time periods as mm/yyyy ○ Week displays time periods as mm/dd/yyyy |
| Business Objective Name | To specify business objectives to include in the report, select the names from the list of business objectives in Financial Management. |
| Business Unit | To specify business units to include in the report, select the names from the list of business units configured for Financial Management. |
| Financial Summary Name | To specify financial summaries to include in the report, select the names from the list of financial summaries in Financial Management. |
| Financial Summary Type | To specify financial summary types to include in the report, select one or more of the following from the list of financial summary types: <ul style="list-style-type: none"> ○ Project ○ Proposal ○ Asset |

| Prompt | |
|-------------|--|
| * Required | Description |
| | <ul style="list-style-type: none"> ○ Org_Unit ○ Program |
| Region Name | To specify regions to include in the report, select the names from the list of regions configured in PPM Center. |

6. From the list in the top section of the dialog box, select a prompt.
7. InfoView lists available values for some prompts in the box in the lower left portion of the dialog box. If no values are listed for the prompt you select, click **Refresh Values** to display the values.
8. After you finish specifying optional data filters, click **Run Query**.

Web Intelligence retrieves the data for the default values and returns the results in the report.

Ad Hoc Reports for Financial Management

The FM Derived Universe delivered with PPM Center includes classes and objects that you can use to create your own operational reports for Financial Management data. This section provides information about the contexts available for ad hoc reports on Financial Management, the best practices for creating reports on Financial Management data, and a description one of the many possible ad hoc reports that you can create for Financial Management.

Contexts for Ad Hoc Reports for Financial Management

When you create an ad hoc report for Resource Management, InfoView may prompt you to select a context for your report query. A context consists of a set of well-defined joins that create a unique query path involving multiple dimensions and facts.

If the multiple facts and measures in a reporting universe are related to a common set of dimensions, the joins between multiple facts and the related dimensions result in a loop. By providing separate contexts for each fact and the related dimensions, the loop is eliminated, so that you can query multiple facts across a set of common dimensions.

Operational Reporting provides the following contexts for the ad hoc reports you create for Financial Management data:

- FA for Programs context

Use the "FA for Programs" context to create queries that include forecast and actuals data for programs. This context includes forecast and actuals only for proposals and projects. (Assets are not included.)

The forecast and actuals data for programs is stored at a monthly granularity. If you select the FA for Programs context, make sure that you select the "Date range" or "Yearly Date Range" filter to query data for a given time period.

- Approved for Programs context

The "Approved for Programs" context enables you to create report queries that include forecast cost, actual cost, and approved costs for programs. Approved costs for proposals, projects, assets and org units are not included.

The forecast cost, actual cost, and approved costs data for programs is stored at a yearly granularity. If you select the Approved for Programs context, make sure that you select the "Yearly Date Range" filter to query data for a given time period.

- FA for Proposal/Project/Asset context

The "FA for Proposal/Project/Asset" context enables you to create report queries that include forecast and actuals for proposals, projects, and assets. Forecast and actuals data for programs and org units are not included.

The forecast and actuals data for proposals, projects, and assets are stored at a monthly granularity. If you select the FA for Proposal/Project/Asset context, make sure that you select the "Date range" or "Yearly Date Range" filter to query data for a given time period.

- Approved for Proposal/Project/Asset context

The "Approved for Proposal/Project/Asset" context enables you to create report queries that include approved costs data for proposals, projects, and assets. Approved costs data for programs and org units are not included.

The approved costs data for proposals, projects, and assets is stored at a yearly granularity. If you select the Approved for Proposal/Project/Asset context, make sure that you select the "Yearly Date Range" filter to query data for a given time period.

- Approved for Org Units context

The "Approved for Org Units" context enables you to create report queries that include cost, actual cost, and approved costs data for org units. Approved cost data for programs, proposals, projects, and assets are not included.

The cost, actual cost, and approved costs data for org units are stored at a yearly granularity. If you select the Approved for Org Units context, make sure that you select the "Yearly Date Range" filter to query data for a given time period.

Best Practices for Reporting on Financial Management Data

This section provides recommendations for getting the best results in the ad hoc operational reports you create for your Financial Management data.

Grouping Program Measures by Business Objective When the Program has Multiple Business Objectives

Suppose you want to construct an ad hoc report query that includes program measures (Forecast, Actuals, Approved, and so on) grouped by business objective, and you want the query results to include one or more objects from the Business Objectives class (in the FM Derived Universe). If you are reporting on a program that has multiple business objectives, the resulting data for the measures are multiplied by the number of associated business objectives. This produces incorrect report data.

To work around this issue, create a report variable that counts the number of separate business objectives for the program. Use this variable in each ad hoc report cell that displays the program measure, to divide the cell's total by this value. (The Financial Summary report uses this mechanism.)

Querying Against Large Datasets

By default, queries time out after running for ten minutes. If you have selected query filters that retrieve a large volume of data, your query may time out and fail to return report results. To prevent this from occurring, do one or both of the following:

- Modify the universe parameters (on the **Controls** tab of the Universe Parameters dialog box) to increase the execution time limit.
- Modify the query filters to retrieve a smaller dataset.

Selecting Yearly Granularity for the Financial Summary Report

If you run the Financial Summary Report with Year as the selected time granularity, you must specify the starting month of the fiscal year as the Begin Period, and the ending month of the fiscal year as the End Period. Otherwise, the yearly values for Forecast and Actuals measures are incorrect.

Disabling Financial Summary for a Program

In Program Management, you can disable the financial summary associated with a program. (For details, see the *Program Management User's Guide*.) During the regular incremental updates of Financial Management data, financial summary data for programs are brought over to the reporting database. The Financial Summary report results do not include the financial summary data, but ad hoc reports results for Financial Management do include this data.

To filter out programs with the financial summary disabled, do one of the following as you create the report query in InfoView:

- Add the **Financial Summary: Enabled** filter (FM Derived Universe, Financial Summary class) to the **Query Filters** panel.

Alternatively,

1. Add the **Financial Summary Enabled** object (FM Derived Universe, Financial Summary class) to the **Query Filters** panel.
2. In the **Query Filters** panel, click the list button in the **Financial Summary Enabled** box (right end), and select **Prompt** from the list.
3. When you run the report and are prompted for a value for Financial Summary Enabled, enter Y.

Comparing the Role of a Position and the Role of a Resource Assigned to the Position

In creating a query that compares the role of a position with the actual role of a resource assigned to that position, you must do the following:

- Select the Role Name object (Roles class) for the role of the position
- Select the Primary Role object (Resource class) for the role of the resource

- Select either the "Resource Demand from Staffing Pool Region" context or the "Resource Demand on Resource Pool Region" context.

Creating Ad Hoc Reports for Financial Management

The FM Derived Universe delivered with PPM Center includes classes and objects that enable you to create your own operational reports for Financial Management data. The following are examples of the ad hoc reports that you can create for your Financial Management data:

- ["Assets, Proposals, and Projects by Program: Example" below](#)
- ["Over-Budget Projects, Proposals, Assets, and Programs by Date" on the next page](#)
- ["Program Lifecycle Entities and Sub-Programs" on page 116](#)
- ["Approved Budget Information for Organization Units, by Region" on page 118](#)
- ["Financial Data for Programs, Organization Units, and Lifecycle Entities \(Including Data for User Data Fields\)" on page 118](#)

Assets, Proposals, and Projects by Program: Example

A program manager can create a report that shows all of the assets, proposals, and projects associated with her programs. ["Table 6-1. FM Universe objects to include in a report on the assets, proposals, and projects associated with programs" below](#) lists the FM Derived universe objects to use to create this report, and where to place them in InfoView.

Table 6-1. FM Universe objects to include in a report on the assets, proposals, and projects associated with programs

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---|---|--|
| Fiscal Periods | Year Period Name | Date Range |
| Financial Summary > Approved Budget | Approved Base | |
| Financial Summary > Forecast & Actuals > Costs | Forecast Base Actual Base | |
| Proposals, Projects and Assets (Lifecycle Entities) | Parent Program Name Financial Summary Name | Parent Program Name |

Table 6-1. FM Universe objects to include in a report on the assets, proposals, and projects associated with programs, continued

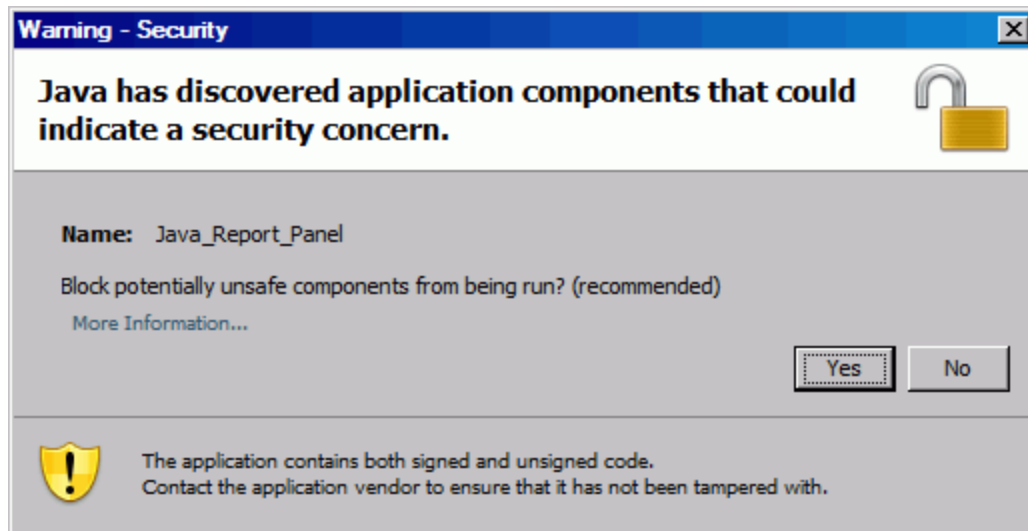
| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|--------------|---|--|
| | Source Entity Type Request ID Request Status Request Type Name Active Workflow Step Name Application Business Objective Name Business Unit Department Entity Asset Class Entity Project Class Entity Region Priority Source Entity Health Source Entity Name Workflow Name | |

Over-Budget Projects, Proposals, Assets, and Programs by Date

You can create a query for a report that shows which projects, proposals, assets, and programs exceed the approved or forecasted budget on a given date. Before you can create this query in InfoView, you must first use Universe Designer to create a new object in the FM Derived universe.

To create a report on projects, proposals, assets, and programs that exceed the approved or forecasted budget on a given date:

1. Open the FM Derived Universe in Universe Designer.
2. A Warning - Security dialog box opens to advise you of a security concern related to Java application components and to allow you to block potentially unsafe components. Click **No**.



3. In the Classes and Objects panel, right-click the **Costs** folder (**Financial Summary > Forecast & Actuals > Costs**) and select **Object**.
4. In the Edit Properties dialog box, name the object "Percentage Filter" and add the following statement to the **Select** section:


```
CASE  
WHEN (@Select(Costs\Forecast Base) IS NOT NULL AND @Select(Costs\Forecast  
Base)!=0 ) THEN  
@Select(Costs\Actual Base) / @Select(Costs\Forecast Base) * 100  
END
```
5. Parse the select statement for syntax errors, and then save and export the FM Derived universe.
6. Log on to InfoView and create a new Web Intelligence report query.

The following table shows the FM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---|---|--|
| Proposals, Projects and Assets (Lifecycle Entities) | Entity Name Request Id Financial Summary Name Entity Type | |
| Financial Summary > Forecast & Actuals > Lines | Expense Type Code Labor Type Code Category Name | Expense Type Code / In list / Capital |
| Fiscal Periods | Month Period Name (or other granularity) | Date Range |
| Financial Summary > Forecast & Actuals > Costs | <ul style="list-style-type: none"> ○ Forecast Base ○ Actual Base ○ Forecasted vs. Actual (in %) ○ Percentage Filter | <ul style="list-style-type: none"> ○ Percentage Filter / Greater than / Constant (100) ○ Exclude Snapshot & FD |

Program Lifecycle Entities and Sub-Programs

You can create a report that lists the lifecycle entities and sub-programs that are associated with your programs. "Table 6-2. FM Universe objects to include in a report query on the lifecycle entities and sub-programs associated with specific programs" below shows the FM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

Table 6-2. FM Universe objects to include in a report query on the lifecycle entities and sub-programs associated with specific programs

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---|--|--|
| Proposals, Projects and Assets (Lifecycle Entities) | Parent Program Name Financial Summary Name Entity Type Request Id Request Status Request Type Name Active Workflow Step Name Application Business Objective Name Business Unit Department Asset Class Project Class Region Priority Entity Health Entity Name Workflow Name | Parent Program Name / In list / Prompt |
| Request Information | Entity Type | |
| Fiscal Periods | Year Period Name | Yearly Date Range |

Table 6-2. FM Universe objects to include in a report query on the lifecycle entities and sub-programs associated with specific programs, continued

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|--|---|--|
| Financial Summary > Approved Budget | Approved Base Forecast Base Actual Base | |

Approved Budget Information for Organization Units, by Region

You can create a report that shows approved budget information for the organization units defined in PPM Center, based on region. "Table 6-3. FM Universe objects to add to a query for a report on approved budget information for organization units, by region" below shows the FM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

Table 6-3. FM Universe objects to add to a query for a report on approved budget information for organization units, by region

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-----------------|---|---|
| Approved Budget | Approved Base Direct Parent Name Financial Summary Type | Financial Summary Type / Equal to / Value from list > ORGANIZATION UNIT |
| Regions | Region Name | Region Name / In list / Prompt |

Financial Data for Programs, Organization Units, and Lifecycle Entities (Including Data for User Data Fields)

You can create a report that shows the financial data for programs, organization units, and lifecycle entities, and which includes data from user data fields configured in PPM Center. "Table 6-4. FM Universe objects to add to a query for a report on financial information for programs, organization units, and LCEs" below shows the FM Derived universe objects to use for this report, where to place them in InfoView, and how to set the query filters.

Note: For information about how to add customized user data fields that exist in your PPM Center forms to your ad hoc reports, see "[Adding Customized PPM Center Data Fields to Ad Hoc Operational Reports](#)" on page 126.

Table 6-4. FM Universe objects to add to a query for a report on financial information for programs, organization units, and LCEs

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|-------------------------------------|---|--|
| Financial Summary > Approved Budget | <ul style="list-style-type: none"> • Actual Base • Direct Parent Name | |

Table 6-4. FM Universe objects to add to a query for a report on financial information for programs, organization units, and LCEs, continued

| Object Class | Result Objects | Query Filters / Operator / Filter Type |
|---|---|--|
| | <ul style="list-style-type: none"> • Financial Summary Type • Forecast Base | |
| <p>Depending on the specific dimension you want to report on, one of the following:</p> <ul style="list-style-type: none"> • Forecast & Actual > Forecast & Actual User Configured Data > Line Level User Configured Data (or Section Level User Configured Data) • Programs > Programs User Configured Data • Proposal, Project, Asset > Proposal, Project, Asset & Other Requests User Configured Data | Visible User Data (one or more) | Visible User Data /Equal to / Value(s) from list |

Reporting Portlets

- ["About Operational Reporting Portlets" below](#)
- ["Adding Operational Report Portlets to PPM Dashboard Pages" on page 122](#)

About Operational Reporting Portlets

HP supplies two PPM Center portlets — the Operational Report portlet and the Operational Report List portlet — that enables you to access operational reports from your PPM Dashboard pages. This chapter provides descriptions of the reporting portlets, and instructions on how to add them to your private pages in the PPM Dashboard.

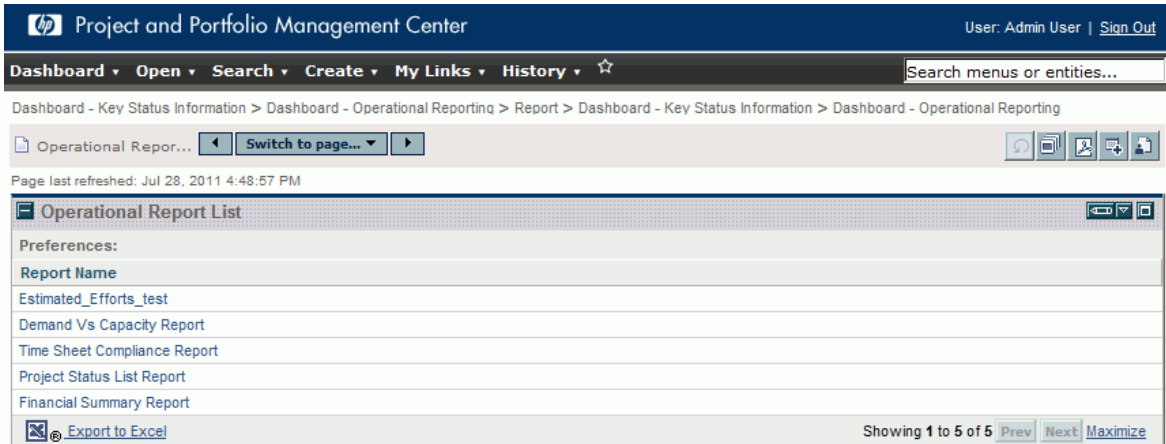
Operational Report List Portlet

The Operational Report List portlet provides a link to each of the preconfigured operational reports that HP provides with Operational Reporting. After you click the link to a report and log on to InfoView, you

have access to all of the linked reports and drill-down functionality associated with the selected report.

By default, the Operational Report List portlet lists the HP-supplied operational reports for Financial Management, Project Management, Resource Management, and HP Time Management data. If your administrator has added ad hoc reports to the portlets, you can also access these reports from the Operational Report List portlet. "Figure 7-1. Operational Report List Portlet on a PPM Dashboard page" below shows the Operational Report List portlet displayed on a PPM Dashboard page.

Figure 7-1. Operational Report List Portlet on a PPM Dashboard page



Operational Report Portlet

The Operational Report portlet displays an HP-supplied operational report based on the report name you select. After you edit your portlet preferences by selecting the name of the ad hoc report to display and log on to InfoView, you have access to the selected report. The following figure shows the Project Status List report displayed on a PPM Dashboard page.

Figure 7-2. Operational Report portlet on a PPM Dashboard page

The screenshot shows the 'Project and Portfolio Management Center' interface. At the top, it displays 'User: Admin User | Sign Out' and a search bar. Below the navigation menu, the breadcrumb trail reads 'Dashboard - Key Status Information > Dashboard - Operational Reporting > Report'. The main content area is titled 'Operational Report Link' and shows a 'Project Status List Report' portlet. The report is displayed in a browser window with a toolbar and a data tree on the left. The data tree lists various fields like 'Group Col 1 Name', 'Project No.', 'Project Name', etc. The report table is as follows:

| Program | Project No. | Project Name | Project Manager | Status | Health | | | |
|------------|-----------------------|---|----------------------|------------------------|---------|----------|-------|---|
| | | | | | Overall | Schedule | Issue | |
| chProgram2 | 49083 | IL 7.1 Configure Overview Project 1 - With Requests | IL Project Manager 1 | Assign Project Manager | ▲ | | ▲ | ■ |
| | 49087 | IL 7.1 Summary Task Owner Project 1 | IL Project Manager 1 | In Planning | ▲ | ■ | ■ | ■ |
| | 49089 | IL 7.1 TM/PM Integration - Active Project | IL Project Manager 1 | In Planning | ▲ | ■ | ■ | ■ |
| | 49091 | IL 7.1 TM/PM Integration - Cancelled Project | IL Project Manager 1 | In Planning | ■ | ■ | ■ | ■ |
| | 47352 | IL Action Items - New | IL Project Manager 1 | In Planning | | | | |
| | 47303 | IL Action Items - On Hold | IL Project Manager 1 | On Hold | | | | |
| | 38261 | IL - Actuals 1 - In Planning with actuals | IL Project Manager 1 | Assign Project Manager | | | | |
| | 45281 | IL Actuals - Default Configuration - Project level | IL Project Manager 1 | Active | ■ | ■ | | |

Operational Report Portlet Security

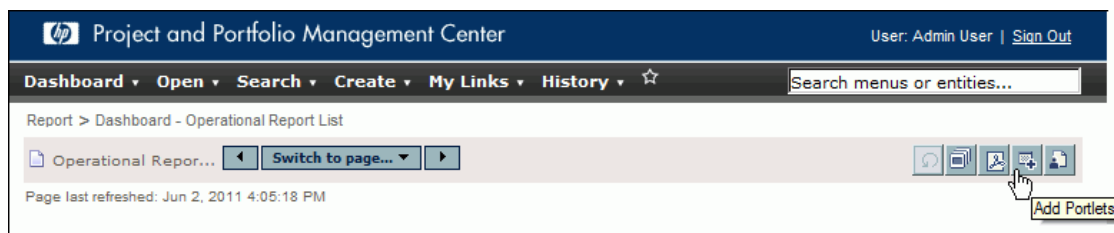
If you have the permissions required to view a report from InfoView, you can see the same report in a reporting portlet from PPM Dashboard pages.

Adding Operational Report Portlets to PPM Dashboard Pages

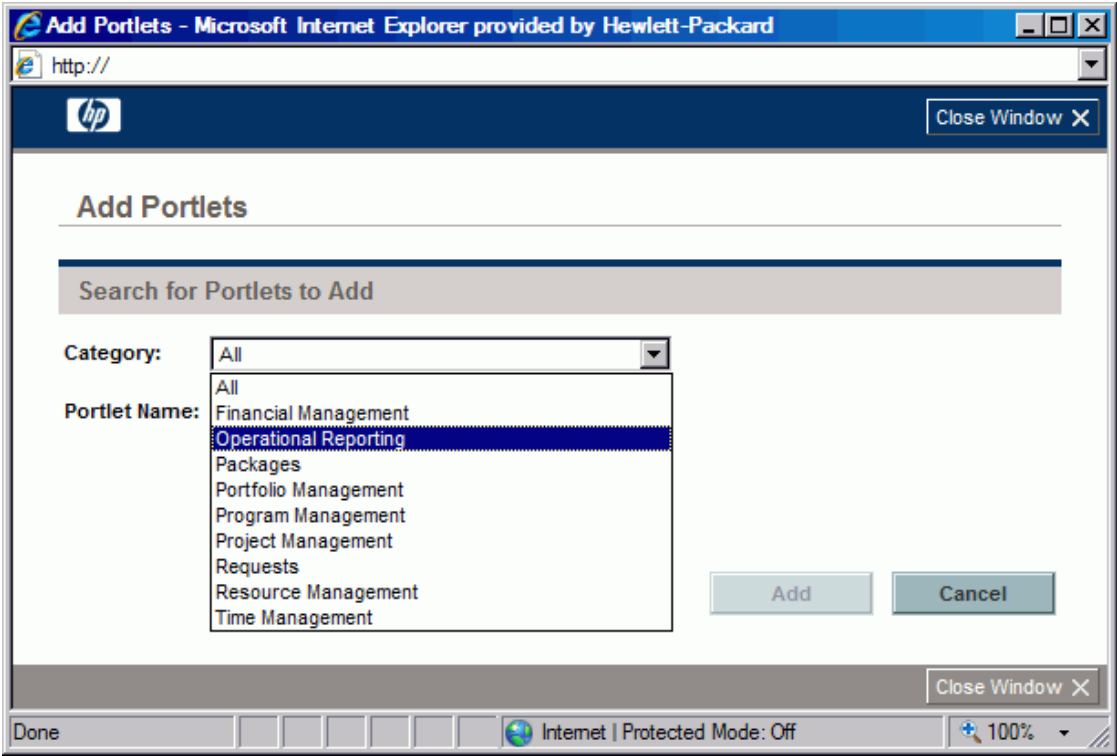
To optimize system performance, HP strongly recommends that you add the operational report portlets to PPM Dashboard pages that do not already display portlets belonging to categories other than Operational Reporting.

To add an Operational Reporting portlet to a PPM Dashboard page:

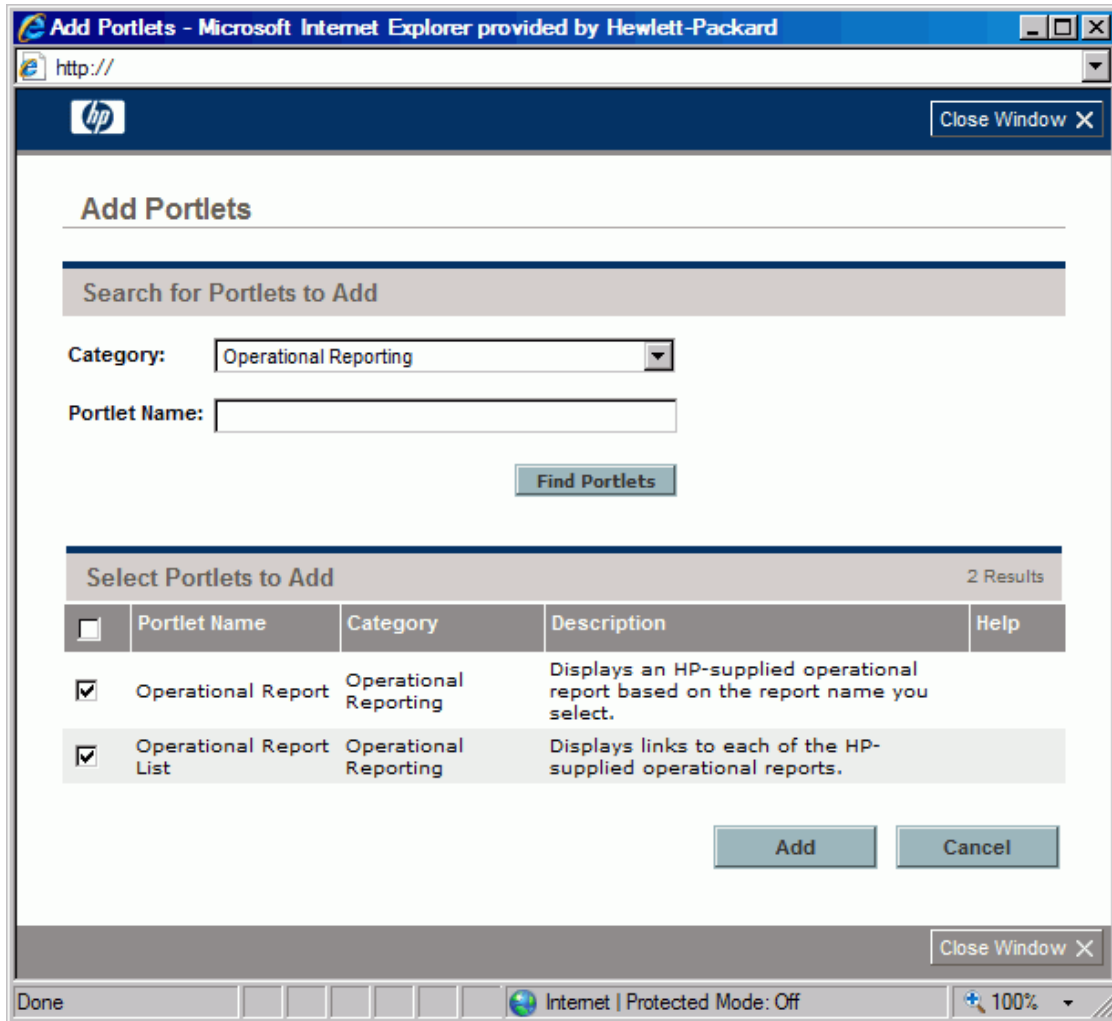
1. From the PPM Center standard interface, go to (or create) the PPM Dashboard page to which you want to add a reporting portlet.



2. Click the **Add Portlets** button.

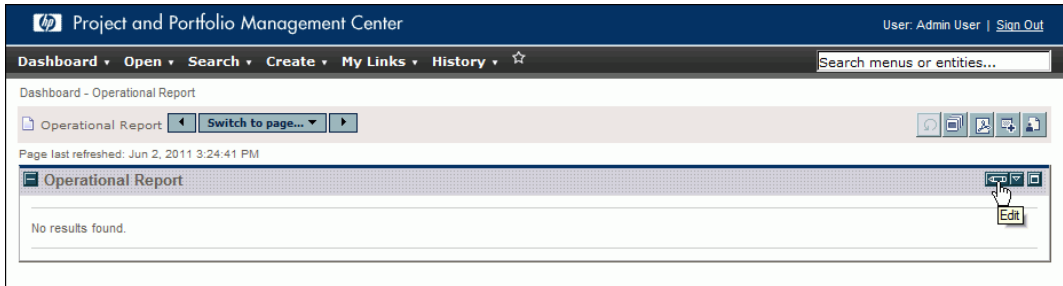


3. From the **Category** list in the Add Portlets window, select **Operational Reporting**.

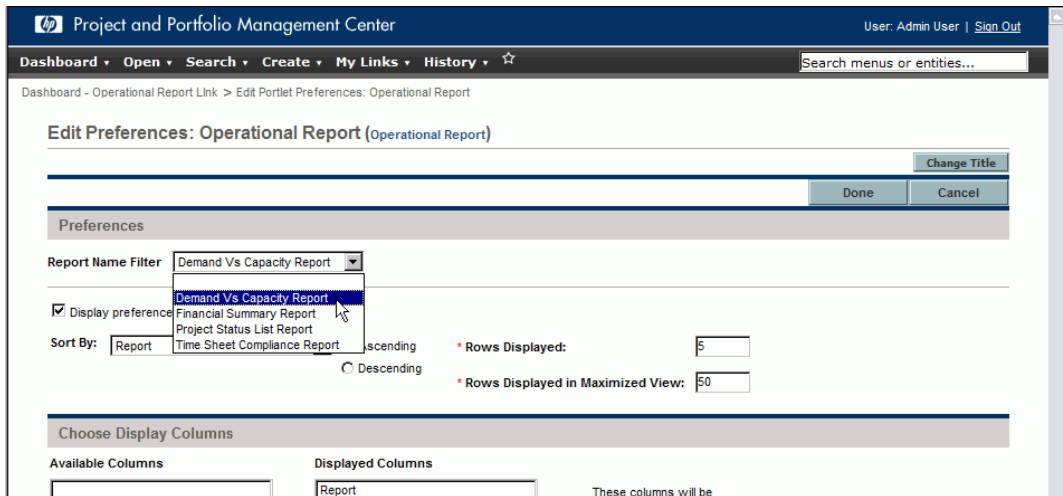


4. Select the check box for one or both portlets, and then click **Add**.
5. If you added the Operational Report portlet to the PPM Dashboard page, select the report for the portlet to display as follows:

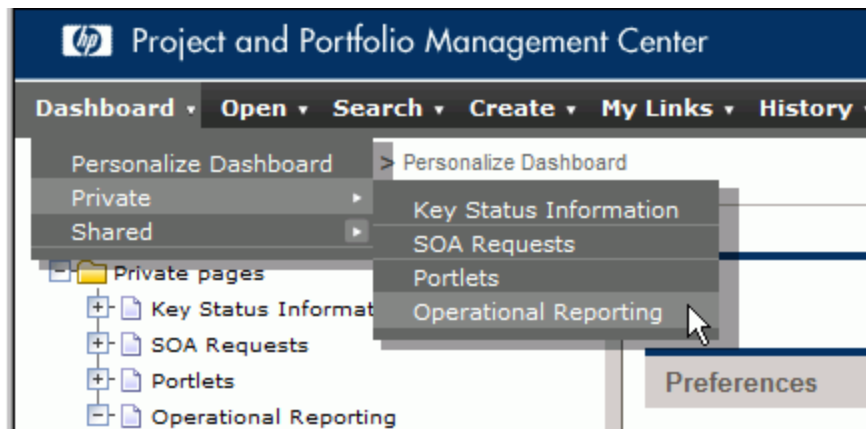
- a. In the Operational Report box, click the **Edit portlet preferences** icon.



The Edit Preferences page opens.



- b. From the **Report Name Filter** list, select the name of the report to display in the portlet.
 - c. Click **Save**.
6. If you use Internet Explorer as your browser, do the following:
- a. From an Internet Explorer browser window, select **Tools > Internet Options**.
 - b. Click the **Security** tab, and then, in the **Select a zone to view or change security settings** box, click **Trusted sites**.
 - c. Click **Sites**.
 - d. In the Trusted sites dialog box, add the base URL for your BusinessObjects server.
7. From the **Dashboard** menu, navigate to the PPM Dashboard page that contains the reporting portlet(s).



Adding Customized PPM Center Data Fields to Ad Hoc Operational Reports

- ["Adding User Data Fields to Operational Reports" below](#)
- ["Saving and Sharing Operational Reports" on page 129](#)

Adding User Data Fields to Operational Reports

This chapter provides information about how to expose the customized user data fields that exist in your PPM Center forms in Operational Reporting and add them to your reports. It also provides information on how to save and share the reports you create in InfoView.

To accomplish this, you first edit a universe user data object to represent a user data field in PPM Center, and then add the user data field to an ad hoc report (in InfoView). The following sections provide instructions for these tasks.

Note: For information about the user data objects in the PPM Center universes, see the *Data Model Guide*.

For information about how to add custom parameters to reports, see the *Operational Reporting Administrator's Guide*.

Editing a User Data Object to Represent a User Data Field

To edit a user data object to represent a user data field that exists in PPM Center:

1. Log on to Universe Designer and open the universe associated with the PPM Center module that you are reporting on.
2. In the Universe panel (left panel), navigate to the subclass that contains user-configured data objects for the PPM Center entity for which user data fields are defined.
3. Double-click the Visible User Data object that corresponds to the user data field in PPM Center. For example, if a user data field is defined for requests in PPM Center, and that field has the user data qualifier USER_DATA3, then, in the Universe designer Universe pane, you would navigate to the **Request User Configured Data** subclass, and then double-click **Visible User Data3**.

The Edit Properties of Visible User Data<N> dialog box opens to the **Definition** tab.

4. In the **Name** box, replace the existing value with the name of the user data field defined in PPM Center.
5. Click **OK**, and then save the file.
6. Repeat [step 2](#) through [step 4](#) for each additional user data field that you want to include in your operational reports.
7. Save the modified universe to the BusinessObjects repository, as follows:

- a. Click **File > Export**.

The Export Universe dialog box opens.

- b. To export the universe to a folder other than the one displayed in the **Domain** box, click **Browse**, and then locate and select a different domain.
- c. In the **Group** box, select the group or groups that require access to the exported universe. (In the **Universes** list, the modified universe is selected by default.)

Universe Designer displays a message that confirms the export operation.

Users can now access the modified universe objects in InfoView.

8. Log on to InfoView and open the Web Intelligence report document to which you want to add the user data field(s).
9. In the Prompts dialog box, select values for any required prompts, and then click **Run Query**.
10. In the InfoView toolbar, click **Edit**.
11. In the Web Intelligence toolbar, click **Edit Query**.

The **Data** tab in the Universe pane now lists all of the objects in the universe that you modified and exported.

- a. To add the user-configured object for the user data field as a report query filter and set the prompt properties:
 - b. On the **Data** tab, select the object, and then drag and drop it into the **Query Filters** section (on the right) where you want it to be listed in the Prompts dialog box relative to the other prompts.
 - c. To change the query operator for the prompt, select an operator from the list of operators.
 - d. On the prompt object in the **Query Filters** section, click **Prompt properties**.

The Prompt dialog box opens.
 - e. Set the properties for the prompt, and then click **OK**.
12. On the report results page, drag the fields to where they make sense in the report.

Editing an Ad Hoc Report to Include a User Data Field

To edit an ad hoc report to include a user data field:

1. Log on to InfoView and open the Web Intelligence document for the report.
2. Add a new filter for a staffing profile line user data field, and incorporate into report queries.
3. Add a new display column and for a staffing profile line user data field, and incorporate into the report.
4. Add a new grouping mechanism for a staffing profile line user data field, and incorporate into the report.

5. Add a new filter for a resource pool user data field, and incorporate into report queries.
6. Add a new display column and for a resource pool user data field, and incorporate into the report.
7. Add a new grouping mechanism for a resource pool user data field, and incorporate into the report.
8. Run the report query.

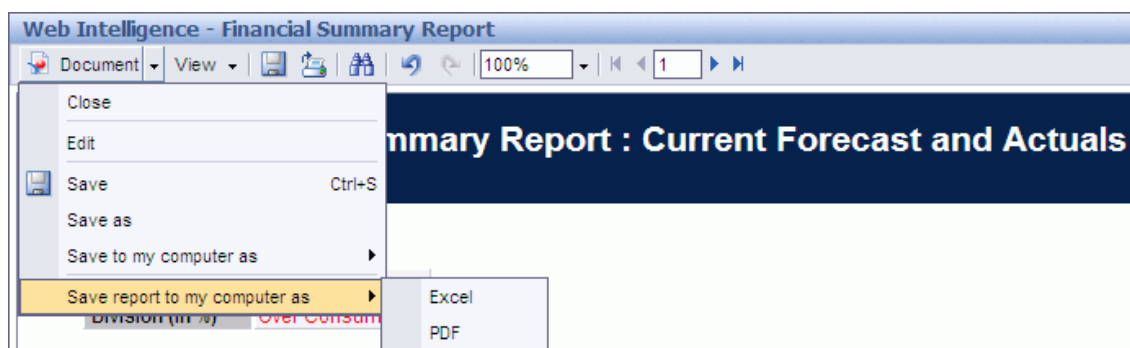
Saving and Sharing Operational Reports

If your report viewers use InfoView, you can save your operational reports as public documents and send them directly to stakeholders. You can also schedule documents for automated refresh and distribution at a time and date you specify. To share reports with viewers who do not use InfoView, you can send reports as Microsoft Excel, PDF and Web Intelligence documents as email attachments that recipients can view and print. You can save a report (Web Intelligence document) in InfoView as a file in any of the following formats:

- Excel spreadsheet
- PDF file
- CSV (comma-separated-value) file

To save the results of a report to your computer as an Excel spreadsheet or PDF file:

- Select **Document > Save report to my computer as**, and then select **Excel** or **PDF**.



Limitation on Saving a Report as an Excel Spreadsheet

BusinessObjects uses its own internal libraries to generate Excel documents. (The version of Excel that you have installed locally is irrelevant.) These internal libraries create a document with the same row

and column limitations as Excel 2003. Regardless of which version of Excel you use to view the exported report results, data are missing.

Workaround

To work around the limitation imposed on exporting report results to an Excel spreadsheet, save the report in txt format, and then import the text document into Excel 2007. Note that, although the resulting data are complete, formatting is lost.

Send Documentation Feedback

If you have comments about this document, you can [contact the documentation team](#) by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on Operational Reporting User's Guide (Project and Portfolio Management Center Content Pack 2.0, on PPM Center 9.30)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to HPSW-BTO-PPM-SHIE@hp.com.

We appreciate your feedback!