Project and Portfolio Management Center

Software Version: Content Pack 4.0

Operational Reporting User's Guide

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Chapter 1: Introduction

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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 the Excel version of the reports that HPE supplies with Operational Reporting.

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 HPE PPM documents that contain useful information for Operational Reporting users. For information about how to obtain the HPE documents listed, see "Accessing PPM Center Documentation" on the next page.

The following HPE 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*

- HPE-Supplied Entities Guide(includes descriptions of all portlets, request types, and workflows in PPM Center)

Accessing PPM Center Documentation

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

Chapter 2: Using Excel Reports for Operational Reporting

This section provides instructions on how to use the Excel version of the reports that HPE supplies with Operational Reporting from PPM Center.

The HPE-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 HPE-supplied Excel reports:

- PPM Center version 9.11~9.40
- Operational Reporting Content Pack 4.0

  For information about installing or upgrading to Operational Reporting Content Pack 4.0, see *Operational Reporting Administrator's Guide* for Content Pack 4.0.

- 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.

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

Prompt * Value Required	Description
	values: • **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	Determines the time interval for data displayed in the report. Select one of the following values: • **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 **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.
*Time Unit	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: • **FTE** • Person Days • Hours
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.

Prompt * Value Required	Description
	From the **Resource Category** list, select one or more resource categories to include in the report.

Project Status List Report

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

Prompt * Required	Description
*Primary Grouping	Primary grouping for project information in the report results Selections include: • 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.

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

Financial Summary Report

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

Prompt * Required	Description
*Begin Period	From the list of all fiscal periods configured for PPM Center, select the starting period for data to include in the report.

Prompt * Required	Description
*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: • 1 • 1,000 • 1,000,000
*Primary Group By	Determines the primary grouping for data in the report. Select one of the following values: • **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. • **Base** • **Local**
*Secondary Group By	Determines the secondary grouping category for data in the report. Select one of the following values: • **Expense Type** • **Labor Type**
*Time Granularity	Determines the time interval for data displayed in the report. Select one of the following values: • **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

Prompt * Required	Description
	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: • **Project** • **Proposal** • **Asset** • **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.

Time Sheet Compliance Report

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

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: • * (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: • * (default) • **Unsubmitted** • **Pending Approval** • In Rework • **Approved** • Frozen • Closed • **Missing**

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

ETL Job History Report

This report displays detialed ETL history information

Report Parameters Restore Default

Enter value(s) for Batch Id:

Enter value(s) for Etl Name:

Enter Job Start Date:

Enter Job End Date:

Enter value(s) for Status:

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

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