HP Project and Portfolio Management Center

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Documentation Updates

This manual's title page contains the following identifying information:

- Software version number, which indicates the software version
- Document release date, which changes each time the document is updated
- Software release date, which indicates the release date of this version of the software

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Why version number 9.10?

PPM Center is an integrated part of the HP BTO Operations version 9 portfolio. Using this version number aligns PPM Center with other products that are releasing in the same time frame. PPM Center 9.10 builds on PPM Center 8.0x and is an extension of that product version family. Product releases within the HP BTO Operations version 9 portfolio will feature shared technology, common platforms, integrations, solutions, upgrade tools, and professional services offerings.

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Contents

1 Introduction

Operational Reporting for HP 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 HP Resource Management, HP Time Management, and HP Financial Management data. The following chapters include descriptions of the preconfigured operational reports that HP supplies with the solution and instructions on how to run them, covers some of the ad hoc reports that you can create for PPM Center data, and provides detailed examples of how to create the Web Intelligence documents and construct queries for ad hoc reports.

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 documents that contain useful information for Operational Reporting users. For information about how to obtain the HP documents listed, see *Accessing Documentation*.

The following documents provide useful information for Operational Reporting users:

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

Accessing Documentation

To obtain any of the HP PPM Center documents listed, go to the Software Product Manuals Web site (support.openview.hp.com/selfsolve/manuals). To access this Web site, you must first set up an HP Passport account.

For information about SAP BusinessObjects Enterprise, see your SAP documentation. For information about how to access SAP documentation, see the HP knowledge document "Documentation for Customers using the Operational Reporting Solution (Business Objects) with PPM 9.1x" (support.openview.hp.com/selfsolve/document/KM1052487).

HP-Supplied Reports

HP provides the following preconfigured module-specific reports with the Operational Reporting for HP Project and Portfolio Management Center (PPM Center):

- Demand Vs Capacity report, for reporting on HP Resource Management
- Time Sheet Compliance report, for reporting on HP Time Management
- Financial Summary report, for reporting on HP Financial Management

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.

2 Reporting on HP Resource Management

This chapter addresses Operational Reporting for HP 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 HP Resource Management data.

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.

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.

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 2-1 provides information about how the Demand Vs Capacity report displays data based on the grouping you select.

Table 2-1. Data display in the Demand Vs Capacity report based on grouping

Selected Grouping	Data Displayed
Role	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. If a resource is assigned to a position to meet the demand, then one of the following is true: • 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. 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.
Resource Pool	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.

Table 2-1. Data display in the Demand Vs Capacity report based on grouping

Selected Grouping	Data Displayed
Region	Both capacity and demand are displayed at the role level for each region. 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 region. **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.

How Regional Calendar Affects Demand Vs Capacity Report Data

Table 2-2 shows which calendars are used to calculate resource capacity for the Demand Vs Capacity report.

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

Resource	Calendar Used to Calculate Capacity (Hours or Days)
Named Resource	Hours and days and FTE are calculated based on the resource's regional calendar and the resource's exceptions. are calculated based on the calendar on the Resource detail page, which is derived from the regional calendar associated with the resource. FTE is calculated based on the calendar that is associated with the resource's region.
Unnamed Resource	Regional calendar associated with the resource pool, which is based on the resource pool region.

Table 2-3 shows which calendars are used to calculate demand data presented in the Demand Vs Capacity report.

Table 2-3. Calendars used to calculate demand (in hours, person days, and FTEs) for PPM Center resources

Demand	Calendar Used to Calculate Demand (Hours or Days)
Met Demand (Committed / soft-booked)	Regional calendar associated with the resource pool.
Unmet Demand	• For unmet demand associated with a resource pool, regional calendar associated with the resource pool (based on the resource pool region). • For unmet demand not associated with a resource pool, the regional calendar associated with the staffing profile.

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.**

   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 Reporting > Resource Management Reports.**

   The Details panel to the right of the Tree panel lists the available report documents.

4. Double-click the row that displays the Demand Vs Capacity Report document.

   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.

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.

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: • **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.

Prompt * Value Required	Description
*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.

Prompt * Value Required	Description
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 to the reports.

Demand Vs Capacity Report Results

Table 2-4 provides descriptions of the columns displayed in the Demand Vs Capacity Report.

Table 2-4. 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 17.)
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.
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* prompt.
Demand	Displays a breakdown of demand for the time period under the following column subheadings (expressed in the selected for the **Time Unit* prompt) for each role in each resource pool represented in the report (and for demand unassigned to any resource pool: • **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 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.

Table 2-4. Columns displayed in the Demand Vs Capacity Report

Column	Description
Capacity	For each time period, displays a breakdown of capacity (expressed in the units selected for the **Time Unit* prompt) by role/resource pool for the following categories: • **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* prompt) by role/resource pool.

Ad Hoc Reports for HP Resource Management

This section provides information about the operational reports that you can create for HP 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 HP Resource Management

When you create an ad hoc report for HP 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 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 HP Resource Management Data

This section provides recommendations for getting the best results in the ad hoc operational reports you create for your HP 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* or *Resource Demand on Resource Pool Region* context.

Creating Ad Hoc Reports for HP Resource Management

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

- *Resources Assigned to Projects*
- *All Resources in a Resource Pool*
- *Baseline Demand Vs. Active Staffing Profile Demand for a Project*
- *Demand, Capacity, and Actual Effort Report (Grouped by Primary Organizational Unit)*
- *Total Demand Vs. Capacity Plus Additional Resource Pool Data*
- *Resource Pools by Region*
- *All Resources by Resource Category*
- *All Assignments to Resource (by Staffing Profile) with Role, Showing All Effort*
- *Staffing Profile Details for Resources*

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

Creating an Ad Hoc Report on HP Resource Management Data: Example

A resource pool manager who needs to determine how the resources in various resource pools are distributed across projects can quickly create a report that provides this information. *Table 2-5* shows which RM Universe objects are required to create this report, and where they belong in the New Web Intelligence Document page.

Table 2-5. RM Universe objects to include in a report on the resources in PPM Center resource pools

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Project Information	Project Name	Project Name / Prompt
Resources	Resource Name	
Resource Pools	Resource Pool Name Resource Pool Managers	
Roles	Role Name	

The following example includes very basic steps required to create and run this report query.

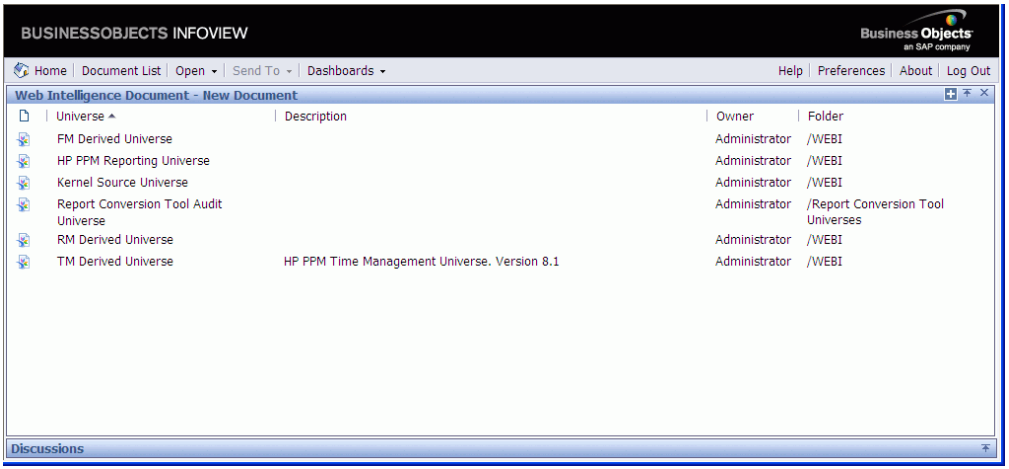
Resources Assigned to Projects

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.**

   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.**

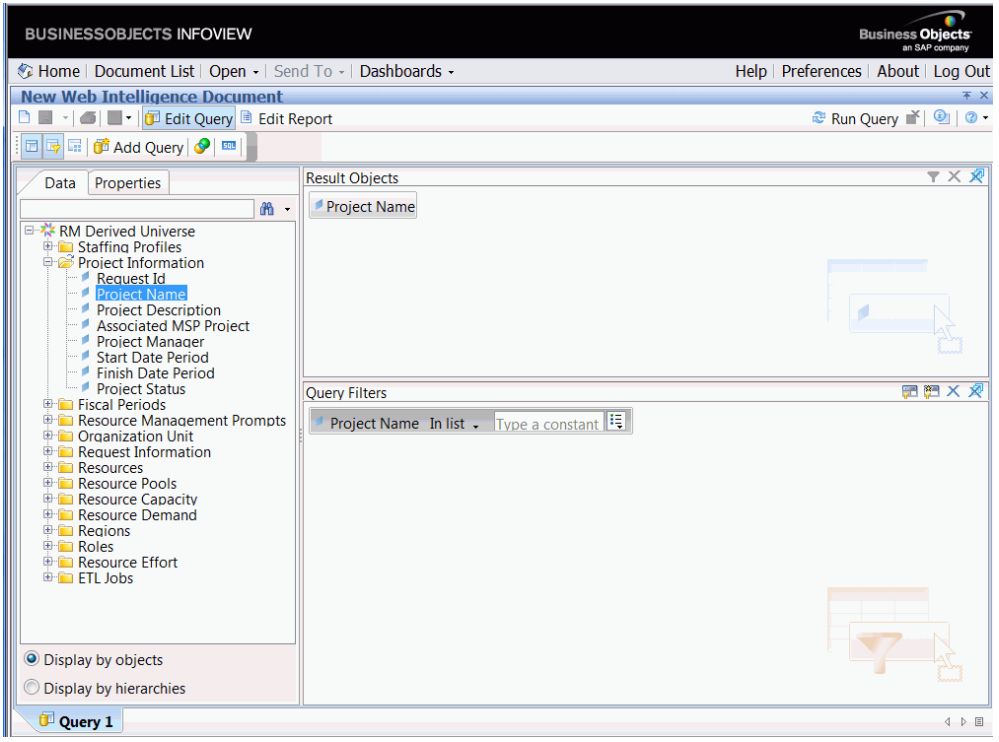


4. From the list of available universes, select the RM Derived Universe.

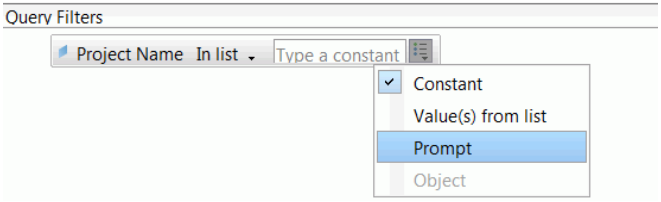
   The **Data** tab in the left pane lists all of the available classes and objects in the RM Derived Universe.

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

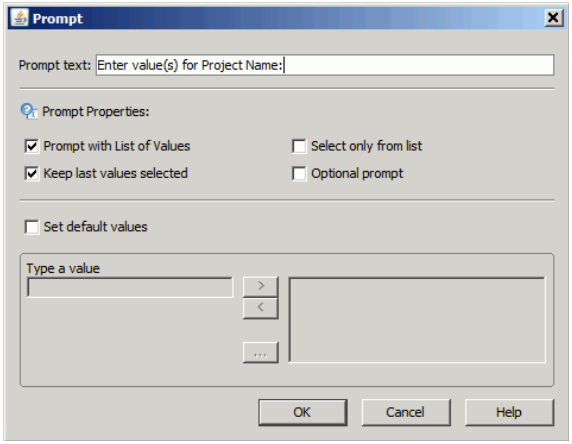
6. Drag the **Project Name** object to the **Result Objects** section on the right (top), and then drag the **Project Name** object to the **Query Filters** section on the right (bottom).



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



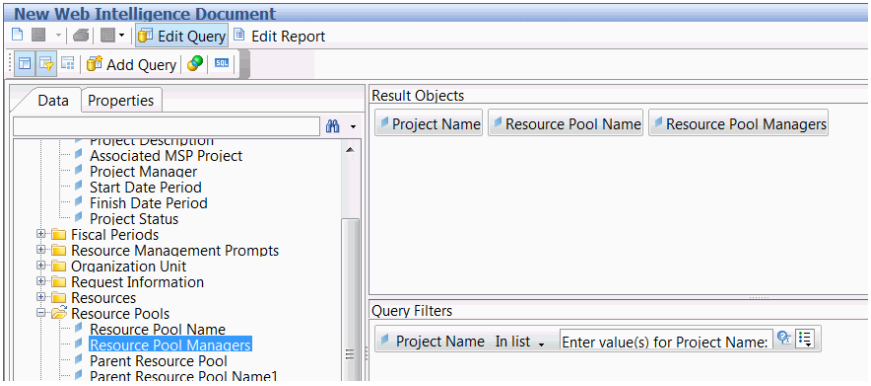
8. In the **Query Filters** panel, click the Prompt Properties button ( ).



9. In the **Prompt Properties** section, select the **Select only from list** and **Optional prompt** check boxes.

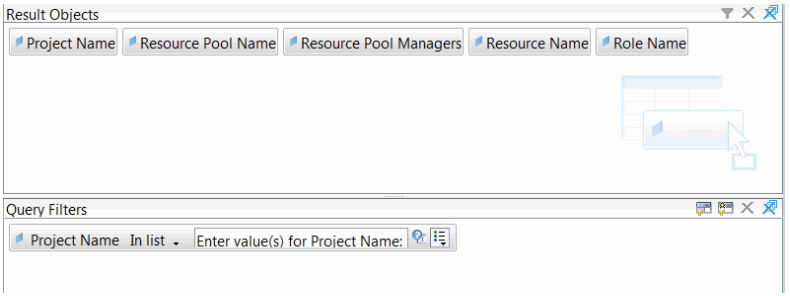
10. Click **OK.**

11. Expand the **Resource Pools** class folder, and then drag the **Resource Pool Name** and **Resource Pool Managers** objects to the **Result Objects** section.



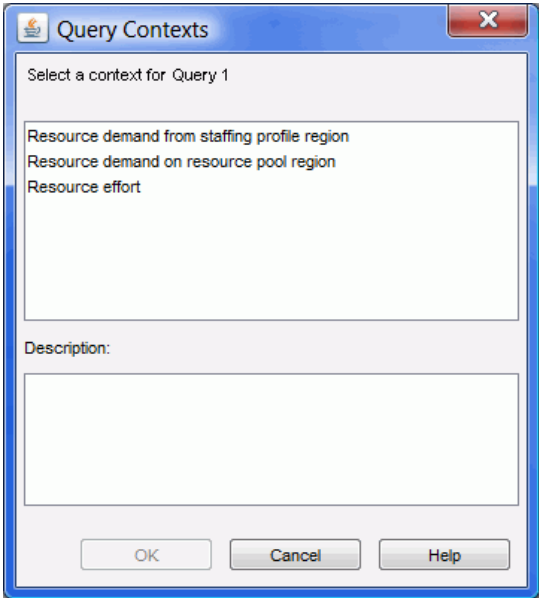
12. Expand the **Resources** class folder, and then drag the **Resource Name** object to the **Result Objects** section.

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



14. Click **Run Query.**

    The Query Contexts dialog box opens.



15. 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 one of the listed contexts for the report, and then click **OK.**

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.

16. 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.

17. Provide a title for the report.

18. 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 2-6. RM Universe objects to include in a report that lists all resources in a resource pool

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Resources	Resource Name	
Resource Pools	Resource Pool Name	Resource Pool Name

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.

  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 HP Resource Management data loaded into the reporting schema.

Baseline Demand Vs. Active Staffing Profile Demand for a Project

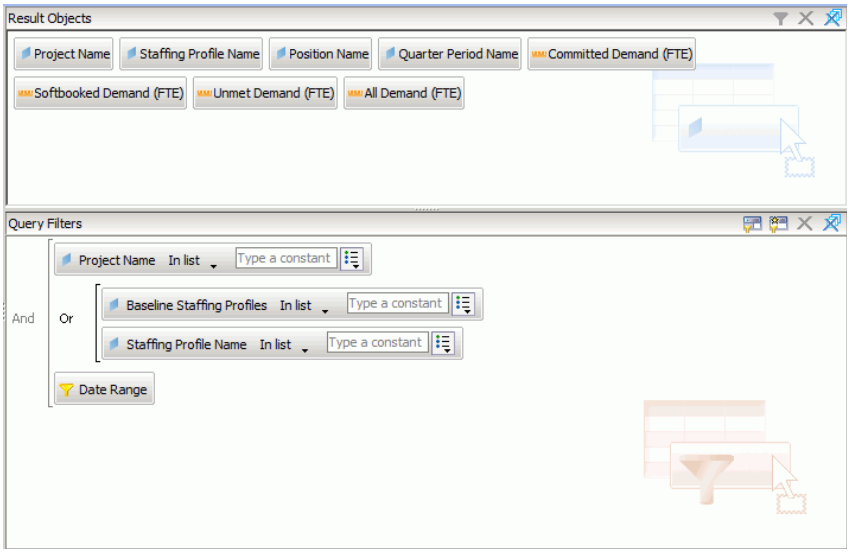
You can create a report that enables you to compare active staffing profiles with baseline staffing profiles for specific projects. *Table 2-7* lists the RM Universe objects that you to add to a Web intelligence document to create this report.

Table 2-7. 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 / Prompt Selection Mode
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 2-1*.

Figure 2-1. Query filters for the ad hoc report Baseline Demand Vs. Active Staffing Profile Demand for a Project



Creating an Ad Hoc Report on HP Resource Management Data: Example on page 28 provides an example of how to add these objects to the Web Intelligence document in InfoView.

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 2-8* lists the RM Universe objects to use to create this report.

Table 2-8. 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 / Prompt Selection Mode
Resources	Primary Organization Unit	Primary Organization Unit
Fiscal Periods	Month Period Name	Date Range
Resource Pools	Resource Pool Name	
Staffing Profiles	Staffing Profile Name	Exclude Demand from Baseline Staffing Profile Exclude Obsolete Demand from Proposal
Roles	Role Name	
Resource Capacity > Capacity (Hours) subclass	All Capacity (Hours)	
Resource Demand > Demand (Hours) subclass	All Demand (Hours)	
Resource Effort	Effort (Hours)	

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 HP Resource Management Data: Example* on page 28.

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 2-9* lists the RM universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 2-9. 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 / Prompt Selection Mode
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 HP Resource Management Data: Example* on page 28.

Resource Pools by Region

You can create a report that enables users to see which resource pools are associated with which regions. *Table 2-10* lists the RM Derived Universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 2-10. RM Universe objects to include in a report on resource pools grouped by region

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Resource Pools	Resource Pool Name Resource Pool Managers	
Regions	Region Name	Region Name / Value(s) from list
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 for this report, and InfoView prompts you to select a context to use with the query, select the "Resource capacity" context.

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.)

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 HP Resource Management Data: Example* on page 28.

All Resources by Resource Category

You can create a report that enables you to see the resource pools and resources used to staff a project. *Table 2-11* lists the RM universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 2-11. 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 / Prompt Selection Mode
Resources	Resource Category Primary Organization Unit Resource Name Primary Role	Resource Category / Prompt
Resource Pool Name	Resource Pools	

When you run this report query, you are prompted to select a context for the report. Select **Capacity Context** for this report.

For an example of how to create and run an ad hoc report for HP Resource Management, see *Creating an Ad Hoc Report on HP Resource Management Data: Example* on page 28.

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 2-12. 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
Staffing Profiles	Staffing Profile Name	
Resources	Resource Name User Name	
Resource Demand > Demand (Hours)	All Demand	Exclude Obsolete Demand from Proposal
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.

Actual effort can be associated with the staffing profile level only if time is logged against a project or a HP 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 2-13* lists the RM universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 2-13. 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 / Prompt Selection Mode
Staffing Profiles	Staffing Profile Name Start Date Finish Date	Staffing Profile Name / Prompt
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 Context** 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 HP Resource Management Data: Example* on page 28.

3 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 the 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.

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 53.

Time Sheet Compliance Report Query Information

Figure 3-1 shows the Prompt dialog box for the Time Sheet Compliance Report. *Table 3-1* provides descriptions of the information you provide for the query.

Figure 3-1. Prompt dialog box for the Time Sheet Compliance Report

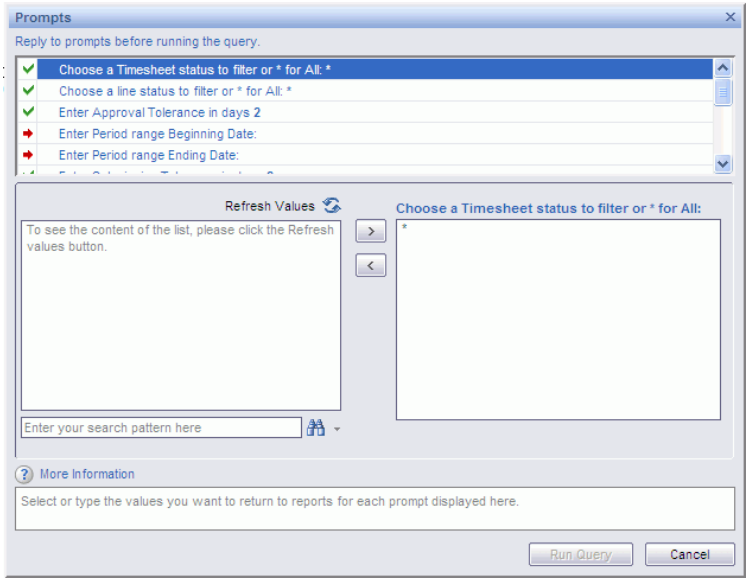


Table 3-1. Prompts for the Time Sheet Compliance Report query

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: • ***** (default) • **Unsubmitted** • **Submitted** • **Approved** • **Rejected** • **Frozen** • **Closed**

Table 3-1. Prompts for the Time Sheet Compliance Report query

Prompt * Value Required	Description
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** **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.

Table 3-1. Prompts for the Time Sheet Compliance Report query

Prompt * Value Required	Description
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.

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.

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 3-2 lists descriptions of the columns displayed on the **Direct Manager** tab of the Time Sheet Compliance Report.

Table 3-2. 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
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

Table 3-2. Columns on the Direct Manager tab of the Time Sheet Compliance Report

Column Heading	Description
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 3-3 lists descriptions of the columns displayed on the **Org Unit** tab of the Time Sheet Compliance Report.

Table 3-3. 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
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 %age
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 %age

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 3-4 lists descriptions of the columns displayed on the **Resource Pool** tab of the Time Sheet Compliance Report.

Table 3-4. 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 %age

Table 3-4. Columns on the Resource Pool tab of the Time Sheet Compliance Report

Column Heading	Description
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 %age

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.

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 HP 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.

  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*
- *Trends in Late Time-Sheet Submission*
- *Trends in Time-Sheet Processing*
- *Tracking Billable Time Logged for a Project*
- *Resources' Work in Progress*

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.

The following example includes very basic steps required to create and run this report query. For detailed information about creating Web Intelligence documents, see your SAP documentation.

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

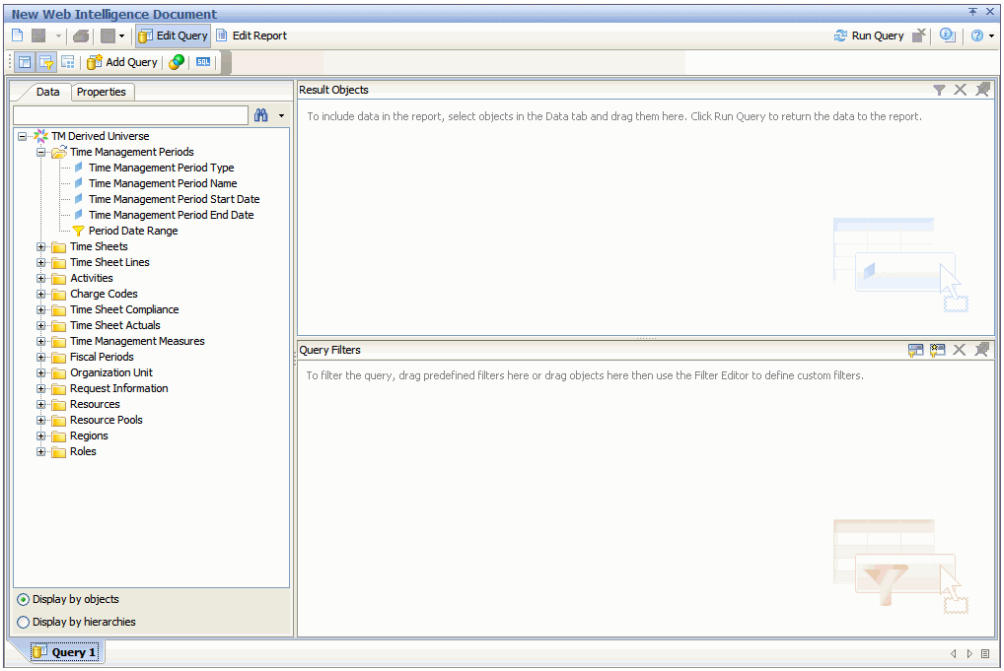
1. Open a web browser window and log on to InfoView.
2. In the **Navigate** section of the InfoView home page, click **Document List.**

   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.**

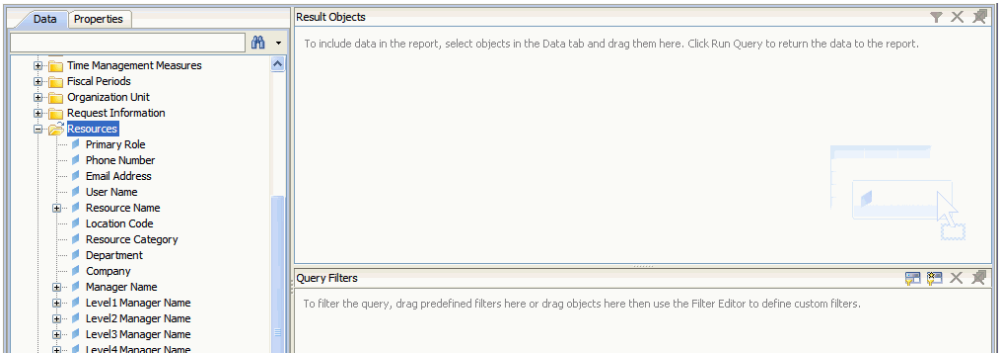
   InfoView displays a list of available universes.

4. Select the TM Derived Universe.

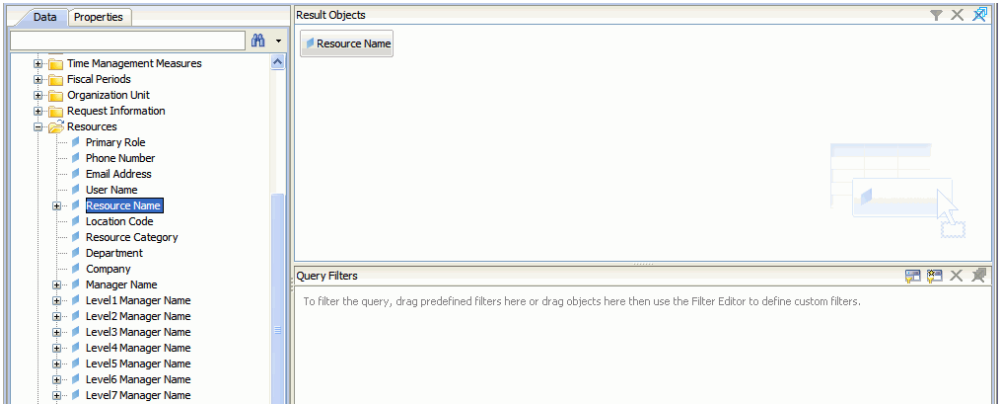


The **Data** tab in the left pane lists all of the available classes and objects in the TM Derived Universe.

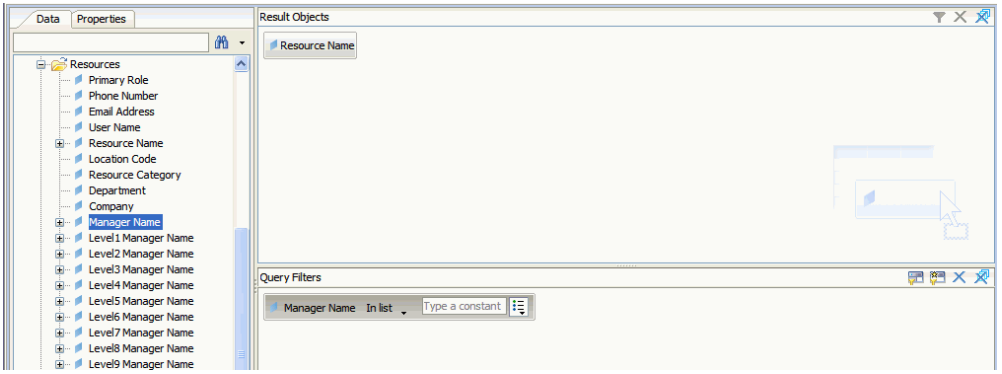
5. Expand the **Resources** class folder.



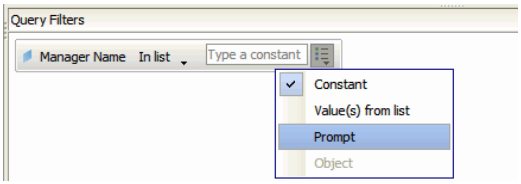
6. Drag the **Resource Name** object from the **Resources** class folder to the **Result Objects** panel on the right (top).



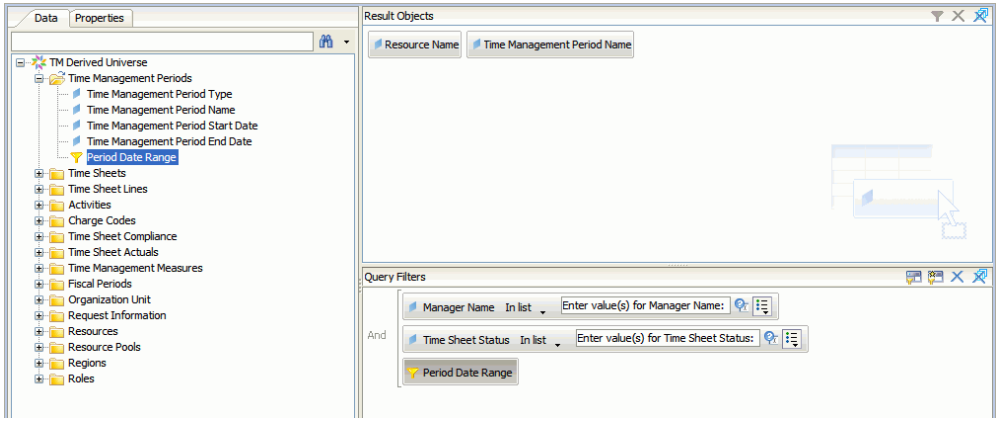
7. Drag the **Manager Name** object from the **Resources** class folder to the **Query Filters** panel on the right (bottom).



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

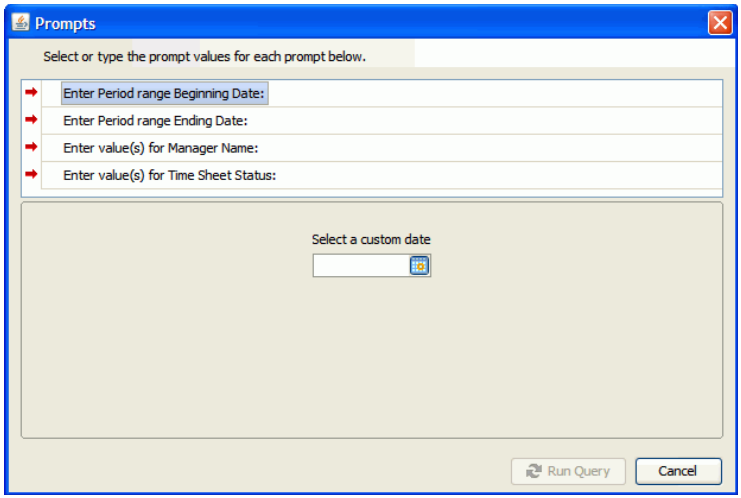


9. On the **Data** tab (left panel), expand the **Time Sheets** class folder.
10. Drag the **Time Sheet Status** object from the **Time Sheet** class folder to the **Query Filters** panel.
11. In the **Time Sheet Status** box in the **Query Filters** panel, click the list button, and then select **Prompt.**
12. On the **Data** tab, expand the **Time Management Periods** folder.
13. Drag the **Time Management Period Name** object from the **Time Management Periods** class folder to the **Result Objects** panel.
14. Drag the **Period Date Range** object from the **Time Management Periods** class folder to the **Result Objects** panel.



15. At the top right of the New Web Intelligence Document page, click **Run Query.**

The Prompts dialog box opens.



16. To specify the date range for the report:

    a. Click **Enter Period range Beginning Date,** and then use the **Select a custom date** multiselect control to select the beginning date for report data.

    b. Click **Enter Period range Ending Date,** and then use the **Select a custom date** multiselect control to select the end date for report data.

17. 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.

18. Click **Enter value(s) for Time Sheet Status,** and then from the list of time sheet statuses, select the following values:

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

19. 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.

20. 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.**

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

22. 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 3-5* lists the TM Derived Universe objects that you would use to create a report on trends in late time-sheet submission.

Table 3-5. TM Derived Universe objects to include in a report on trends in late time-sheet submission

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Time Management Measures	Compliant Submission Submission Percent Total Submissions	
Resources Dimension	User Name Manager Name Primary Org Unit Department	Manager Name / equal to Primary Org Units / equal to Department / equal to
Periods	Period Date Range	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 58.

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 58.

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 3-6* lists the TM Derived Universe objects that you would use to create a report on billable time for a project.

Table 3-6. TM Derived Universe objects to include in a report on billable time

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Time Sheet Lines	Work Item Name Work 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 58.

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 3-7* lists the TM Derived Universe objects that you would use to create a report on resources' work in progress.

Table 3-7. TM Derived Universe objects to include in a report on resources' work in progress

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Time Sheet Lines	Work Item Name Work 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 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.

4 Reporting on HP Financial Management

This chapter addresses Operational Reporting for HP 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 HP Financial Management data.

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.

Financial Summary Report Prompts

Table 4-1 lists the prompts for the Financial Summary Report.

Table 4-1. Information to provide for the Financial Summary Report

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

Table 4-1. Information to provide for the Financial Summary Report

Prompt * Required	Description
*Secondary Group By	Determines the secondary grouping category for data in the report. Select one of the following values: • **Expense Type** • **Labor Type**
*Select Currency Base	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**
Enter value(s) for Financial Summary Name	To specify financial summaries to include in the report, select the names from the list of financial summaries in HP Financial Management.
Enter value(s) for Business Unit	To specify business units to include in the report, select the names from the list of business units configured for HP Financial Management.
Enter value(s) for 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**
Enter value(s) for Business Objective Name	To specify business objectives to include in the report, select the names from the list of business objectives in HP Financial Management.
Enter value(s) for Region Name	To specify regions to include in the report, select the names from the list of regions configured in PPM Center.

Ad Hoc Reports for HP 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 HP Financial Management data. This section provides information about the contexts available for ad hoc reports on HP Financial Management, the best practices for creating reports on HP Financial Management data, and a description one of the many possible ad hoc reports that you can create for HP Financial Management.

Contexts for Ad Hoc Reports for HP Financial Management

When you create an ad hoc report for HP 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 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 HP Financial Management Data

This section provides recommendations for getting the best results in the ad hoc operational reports you create for your HP 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 HP Program Management, you can disable the financial summary associated with a program. (For details, see the *HP Program Management User's Guide*.) During the regular incremental updates of HP 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 HP 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 an Ad Hoc Report for HP Financial Management: Assets, Proposals, and Projects by Program

If you are a program manager, you can create a report that shows all of the assets, proposals, and projects associated with your programs. *Table 4-2* lists the FM universe objects to use to create this report, and where to place them on the New Web Intelligence Document page.

Table 4-2. FM Universe objects to include in a report on assets, proposals, and projects as a function of program

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Proposals, Projects and Assets (Lifecycle Entities)	Parent Program Name Financial Summary Name 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	Parent Program Name

Table 4-2. FM Universe objects to include in a report on assets, proposals, and projects as a function of program

Object Class	Result Objects	Query Filters / Prompt Selection Mode
Fiscal Periods	Year Period Name	Date Range
Financial Summary > Approved Budget	Approved Base	
Financial Summary > Forecast & Actuals > Costs	Forecast Base Actual Base	

5 Adding Customized PPM Center Data Fields to Ad Hoc Operational Reports

About this Chapter

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

Adding User Data Fields to Operational Reports

This chapter provides information about how add the customized user data fields that exist in your PPM Center forms to operational reports. It also provides information on how to save and share the reports your 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.

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

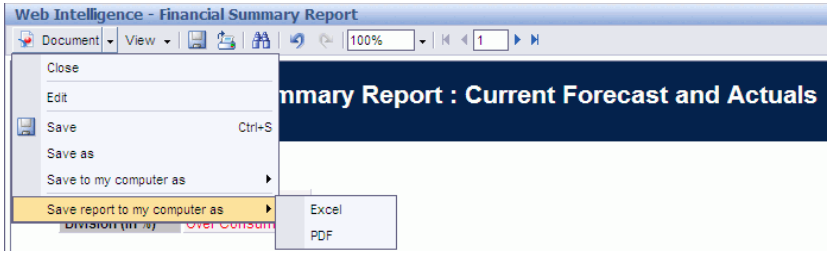
Saving and Sharing Operational Reports

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.

Index

P

R

S

T

U