CA Clarity™ PPM

Solution Pack Product Guide

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Chapter 1: Overview

About the Clarity Solution Pack

The Clarity Solution Pack add-in is a collection of dashboard and reporting content to be used in conjunction with the PMO Accelerator add-in. The PMO Accelerator is a required prerequisite of the Clarity Solution Pack because many of the dashboards and reports reference content that is delivered in the PMO Accelerator. The most recent version of the PMO Accelerator Product Guide and Release Notes are available from the Documentation page on CA Support.

The Clarity Solution Pack includes the following content:

- Xcelsius Dashboards
- Crystal Reports

See the CA Clarity PPM *Solution Pack Release Notes 3.3* for information about installing the Clarity Solution Pack add-in.

Set Up Time Slices for the Clarity Solution Pack

The time slice requests (*Administration/Data Administration-Time Slices*) in the below table are referenced by reports. The time slice requests must be configured to cover the periods displayed in the reports or the reports will not display data for those periods. The individual report sections of this document indicate which reports reference the time slices so you may search the document to determine which reports are dependent upon them.

The values in the From Date and Number of Periods columns are basic guidelines for setting up your time slice requests. You may need to adjust the From Date and Number of Periods up or down based on the date ranges necessary to cover the ranges of your data. If you configure any of the time slice requests, you must run the Time Slicing job (*Home/Personal-Reports and Jobs*) to populate the time slice tables with the change.

If you are changing several time slice requests at one time, it is best to do this after normal working hours when you do not have many users accessing Clarity. If possible, it is optimal to do this on a Friday evening so the slices have all weekend to rebuild. It is also recommended to change the same types of slice requests at the same time. For example, if you are changing allocation time slice requests, it is best to change all of the allocation slice requests you need to change at the same time so they are processed most efficiently.

The Clarity Solution Pack installs four time slice requests, which are also included in the below table: DAILYCURRENTBASEPROJCOST, DAILYCURRENTBASEPROJUSAGE, MONTHLYCURRENTBASEPROJCOST, and MONTHLYRESOURCEHARDALLOC.

Time Slice Name	Item	From Date	Slice Period	Number of Periods
DAILYCURRENTBASEPROJCOST	Current Baseline Cost	The first day of the month, one month prior to the current month.	Daily	200
DAILYCURRENTBASEPROJUSAGE	Current Baseline Hours	The first day of the month, one month prior to the current month.	Daily	200
DAILYRESOURCEALLOCCURVE	Allocations	The first day of the month, six months prior to the current month.	Daily	400
DAILYRESOURCEAVAILCURVE	Availability	The first day of the month, six months prior to the current month.	Daily	400
DAILYRESOURCETIMECURVE	Time Entry	The first day of the month, twelve months prior to the current month.	Daily	400
WEEKLYRESOURCEACTCURVE	Actuals	The same day of the week that is set in Administration for 'First Day of Work Week', one year prior to the current week.	Weekly	110
WEEKLYRESOURCEALLOCCURVE	Allocations	The same day of the week that is set in Administration for 'First Day of Work Week', one year prior to the current week.	Weekly	110

Time Slice Name	Item	From Date	Slice Period	Number of Periods
WEEKLYRESOURCEAVAILCURVE	Availability	The same day of the week that is set in Administration for 'First Day of Work Week', one year prior to the current week.	Weekly	110
WEEKLYRESOURCEESTCURVE	Estimates	The same day of the week that is set in Administration for 'First Day of Work Week', one year prior to the current week.	Weekly	110
MONTHLYCURRENTBASEPROJCOST	Current Baseline Cost	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYCURRENTBASEPROJUSAGE	Current Baseline Hours	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYRESOURCEACTCURVE	Actuals	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYRESOURCEALLOCCURVE	Allocations	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYRESOURCEAVAILCURVE	Availability	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYRESOURCEBASECURVE	Baseline	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYRESOURCEESTCURVE	Estimates	The first day of the month, two years prior to the current month.	Monthly	50
MONTHLYRESOURCEHARDALLOC	Hard Allocation	The first day of the month, two years prior to the current month.	Monthly	50

Jobs Used by the Reports

The following table is a summary of all the CA Clarity jobs (*Home/Personal-Reports and Jobs*) required by reports; however, which jobs are required depends on the report. To determine if a job is required for a specific report, you may search the document on the job name to determine which reports are dependent upon it. Each report has 'Report Prerequisites' and 'Report Security and Technical Details' sections that detail the jobs required to populate data in the report.

Job Name	Description
Create Business Objects Users	A CA Clarity PPM user cannot run reports if there is no corresponding user account in Business Objects. This job creates a user account in Business Objects for each missing, active non-LDAP Clarity user and adds the user to the CA-PPM-Reporting-User group in Business Objects. Each user is created in Business Objects with a randomly generated password. The Business Objects Administrator needs to set the password for each user before they can log into Business Objects InfoView. This job should be scheduled based upon the frequency new users are added to Clarity.

Job Name	Description
Time Slicing	The time slice requests must be configured to cover the periods displayed in the reports or the reports will not display data for those periods. If you configure any of the time slice requests, you must run the Time Slicing job (*Home/Personal-Reports and Jobs*) to populate the time slice tables referenced by the reports. This job should be running on your system at scheduled intervals.
Update Business Objects Report Tables	The Update Business Objects Report Tables job is required for reports that display any of the following: monthly or weekly calendar periods; FTE amounts; and OBS level or phase grouping options. This job populates reporting tables based on the parameters selected when running the job. If these tables are not populated, reports dependent upon them display a 'No Data Found' message. This job should be scheduled to run nightly to keep the reporting tables up to date. The following are the available parameters for this job, each one populating a different table: **Update Reporting Calendar:** This parameter populates the calendar table (rpt_calendar) that stores date ranges for daily, weekly, monthly and quarterly calendar periods, as well as the FTE for the date range. The start day of the weekly periods is determined by the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). When this job option is run, it will populate the table five years back and five years forward, based on the current date. For example, if you run the job in October of 2012, the table will be populated with periods from October 2007 through October 2017. Most of the reports displaying data by calendar period reference this table and will display a 'No Data Found' message if this table is not populated. This job option should be run at least once a month. It should also be run if the availability of the resource with Resource ID of 'admin' changes, because this resource's calendar is the calendar that determines the FTE calculation. **Update Investment Hierarchy:** This parameter populates the investment hierarchy table (rpt_inv_hierarchy) that stores up to ten levels of investment hierarchical relationships and hierarchy allocation percentages. This investment hierarchy table is being used by reports in the solution pack. This parameter also populates the program hierarchy table (rpt_program_hierarchy) that stores up to five levels of program and project hierarchical relationships. This program hierarchy table is not being used by any reports in the solution pack. **Update WBS Index:** This parameter populates the WBS index table (rpt_wbsindex) that stores relationships between phases and tasks. This job option does an incremental update so it can be scheduled to run frequently (e.g., once an hour) if necessary. **Update Resource Skills Index:** This parameter populates the resource skills tables (rpt_res_skills_index and rpt_res_skills_flat) that store relationships between resource skills and their parent skills. The job supports up to ten levels in the skills hierarchy. **Update OBS:** This parameter populates the data mart OBS table (nbi_dim_obs) that stores OBS unit information up to ten levels. This table is used in some reports for grouping by OBS level. This job option should be running on your

Job Name	Description
	system nightly, or if there are changes to the OBS structure. Note: The Datamart Extraction job also populates this table.
Post Timesheets	The reports showing actuals entered through timesheets depend on the Post Timesheets job. This job posts approved timesheets. The posted actuals display on the investment, team, and task assignments. This job also populates the transaction import tables if financials are set up on the investments and resources. This job should be running on your system at scheduled intervals based on your timesheet cycle.
Post Transactions to Financial	The financial reports depend on this job. This job transfers data from the transaction import tables to the financial transaction tables. This data could be the result of posted timesheets or transactions imported from external systems. This job should be running on your system at scheduled intervals based on your financial transaction cycle. Note: After running this job you must run the Post to WIP in order to post transactions to the financial posted transaction tables.
Post to WIP	The financial reports depend on this job. This job transfers data from the financial transaction tables to the financial posted transaction tables. Once transactions are in these tables, they will display on the financial cost plans and budget plans in Clarity. The Post to WIP job is available in the menu (*Home/Financial Management-Post to WIP*), not in Reports and Jobs (*Home/Personal-Reports and Jobs*) with the other Clarity jobs. Transactions should be posted to WIP based on your financial transaction cycle.
Import Financial Actuals	The reports showing ETC and actual amounts at the investment or task level depend on this job; if transactions were entered thru transaction entry, imported into Clarity from an external system, or a WIP adjustment was made. This job updates team and task assignments with the actual quantity and cost. The assignment ETC is decremented through the transaction entry date. ETC in the future is not decremented even if the actual amount is greater than the ETC amount for the period being posted. This job should be running on your system at scheduled intervals based on your financial transaction cycle.
Investment Allocation	The reports showing effort amounts at the investment level depend on this job. The Investment Allocation job updates ETC and EAC effort amounts on the investment. It calculates the sum of the ETC and EAC values for all the investment's assignments and stores the values in the respective fields. This job should be running on your system nightly.
Rate Matrix Extraction	The reports showing estimated costs at the assignment level depend on the Rate Matrix Extraction job. This job extracts rate matrix information and populates the data mart rate table (nbi_proj_res_rates_and_costs). This job should be running on your system nightly.
Update Earned Value Totals	The reports showing project, phase, and task level cost amounts are dependent upon running the Update Earned Value Totals job. This job does a runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table) and invokes the Update % Complete job. Then, it updates the cost amounts up the WBS hierarchy and on project properties. The Update % Complete job updates the % complete values whenever you change project or task data that affects the percent complete calculation. This Update % Complete job only applies if the % Complete Calculation field is set to

Job Name	Description
	Effort or Duration. This is a field in the general section of the settings properties on the project. This job should be running on your system nightly.
Update Earned Value History	The report showing Earned Value metrics by time period depends on the Update Earned Value History job. This job calculates earned value metrics for a project or group of projects, based on parameters selected, and creates earned value snapshots of the data by time period. This data is based on the earned value reporting period set on the project and earned value calculation method set on the project, or tasks. The earned value snapshots are used for historical earned value analysis (EVA) and reporting. The snapshots are stored in rows in the earned value history table (prj_ev_history). This job also invokes the Update % Complete job so you do not need to run this job separately. The Update Earned Value History job uses the lag value to determine the day to take the snapshot. A snapshot is taken on the first day following the defined lag, providing you do not run the job on that day. This job should be running on your system weekly or monthly, based on how often your organization reports on earned value data. The following are the available parameters for this job: **Lag:** This parameter determines the number of days to use to calculate what period to populate, based on today's date. Basically, it calculates today's date minus lag days. If the result falls within a period, it goes back one period from the period you are in. If you schedule this job to run monthly starting on 09/01/2012 with a lag of 3 days and you have associated the project to an earned value reporting period which has a period type of monthly and frequency is the first day of the month, then a snapshot for August 2012 is generated only when the job runs on 09/04/2012 or later. If you run the job on 09/01/2012 with a lag of 0 days, then the last complete period ends on 08/31/2012, and a snapshot for August 2012 is generated. If you run the job on 09/01/2012 with a lag of 2 days, then the last complete period ends on 07/31/2012, and a snapshot for July 2012 is generated. **Rewrite Existing Snapshot:** If this parameter is checked, the job will regenerate the current reporting period snapshot and replace the existing current periodic snapshot with updated data. If not checked, the projects having periodic snapshots are ignored. It is recommended checking it so you can run this job multiple times during a period and maintain only one reporting period record.
Update Earned Value History	**Show Projected ACWP:** If this parameter is checked, the job will create data for the projected actual cost of work performed (ACWP) for all top level tasks in the work breakdown structure (WBS) of each project. It is recommended to leave it unchecked. **Show Projected BCWP:** If this parameter is checked, the job will create data for the projected budgeted cost of work performed (BCWP) for all top level tasks in the work breakdown structure (WBS) of each project. It is recommended to leave it unchecked. **Show Projected BCWS:** If this parameter is checked, the job will create data for the projected budgeted cost of work scheduled (BCWS), as of the date, for each project and its tasks. This should be set to your preference, there is no recommendation.

Job Name	Description
Synchronize portfolio investments	The portfolio reports depend on this job. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included. This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, they will display in the portfolio portlets and reports. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.

Language and Locale Settings for Reports

The language selected in Clarity (*Home/Account Settings-Personal Information*) applies to Crystal report labels and is passed via Clarity. However, the locale selected in Clarity (*Home/Account Settings-Personal Information*) does not apply to Crystal reports. Crystal uses number, time and date formats from the locale of the client computer on which Crystal is running rather than the Clarity settings.

In order to display consistent number, time and date formats in Clarity and Crystal reports, you must set the locale in both Clarity and your local client operating system.

Crystal Report Source Files

The Crystal report source files (RPT) are included in the add-in and are available after the installation in the CA Clarity PPM reporting content folder, <install>\reporting\content\csp\bo\reports\<database>.

If you need to get the source files without installing the Clarity Solution Pack, you can go to support.ca.com and download the CSP source files from the Clarity Solution Pack page to your computer. The Clarity Solution Pack is at the following location on the support site: *CA Clarity Project & Portfolio Manager product page/Product Status section/Clarity Solution Pack link*. Extract the source files to a directory location.

The RPT files require the SAP Business Objects Crystal Reports client. The Crystal Reports client can be downloaded and installed locally on your computer. See the *CA Clarity PPM Release Notes* for the supported Crystal Reports client.

The following source files are included:

Crystal Report	Source File
Capacity vs. Allocation by OBS	Capacity vs Allocation by OBS.rpt
Capacity vs. Booking Status by OBS	Capacity vs Booking Status by OBS.rpt
Capacity vs. Demand by Resource	Capacity vs Demand by Resource.rpt
Capacity vs. Demand by Role	Capacity vs Demand by Role.rpt
Financial Budget vs. Forecast by Period	Financial Budget vs Forecast by Period.rpt
Financial Capitalization by Investment	Financial Capitalization.rpt
Financial Forecast Review by Investment	Financial Forecast Review.rpt
Financial Forecast Review by Plan Grouping	Financial Forecast Review by Plan Grouping.rpt
Investment Allocations and Assignments	Investment Allocations and Assignments.rpt
Investment Assignments by Task	Investment Assignments by Task.rpt
Investment Baseline vs. Plan by Task	Investment Baseline vs Plan by Task.rpt
Investment Time and Estimate Review	Investment Time and Estimate Review.rpt
Investment Transaction Inquiry	Investment Transaction Inquiry.rpt
Key Task and Milestone Status	Key Task and Milestone Status.rpt
KPIs by Project Type	KPIs by Project Type.rpt
Missing Time	Missing Time.rpt
Over/Under Allocation by Resource	Over Under Allocation by Resource.rpt
Over/Under Allocation by Role	Over Under Allocation by Role.rpt
Portfolio Plan Changes	Portfolio Plan Changes.rpt
Portfolio Plan Changes - Waterline and Rank	Portfolio Plan Changes - Waterline and Rank.rpt
Portfolio Plan Comparison	Portfolio Plan Comparison.rpt

Crystal Report	Source File
Program Budget vs. Forecast by Period	Program Budget vs Forecast By Period.rpt
Program Milestone Dependencies	Program Milestone Dependencies.rpt
Program Status Detail	Program Status Detail.rpt
Project Allocations by Employment Type	Project Allocations by Employment Type.rpt
Project Change Request Register	Project Change Request Register.rpt
Project Cost and Effort	Project Cost and Effort.rpt
Project Earned Value	Project Earned Value.rpt
Project Issue Register	Project Issue Register.rpt
Project List	Project List.rpt
Project Planning Schedule	Project Planning Schedule.rpt
Project Portfolio Summary	Project Portfolio Summary.rpt
Project Risk, Issue, and Change Summary	Project Risk, Issue, and Change Summary.rpt
Project Risk Register	Project Risk Register.rpt
Project Schedule	Project Schedule.rpt
Project Status Detail	Project Status Detail.rpt
Project Status Report List	Project Status Report List.rpt
Project Status Summary	Project Status Summary.rpt
Project Storyboard	Project Storyboard.rpt
Project Task Dependencies	Project Task Dependencies.rpt
Resource Allocations and Assignments	Resource Allocations and Assignments.rpt
Resource Assignments by Task	Resource Assignments by Task.rpt
Resource Availability	Resource Availability.rpt
Resource Baseline vs. Plan by Employment Type	Resource Baseline vs Plan by Employment Type.rpt
Resource Forecasted Utilization	Resource Forecasted Utilization.rpt
Resource Forecasted Utilization Detail	Resource Forecasted Utilization Detail.rpt
Resource Skills	Resource Skills.rpt
Resource Skills and Remaining Capacity	Resource Skills and Remaining Capacity.rpt
Resource Time Review by Manager	Resource Time Review by Manager.rpt
Resource Time Summary and Detail	Resource Time Summary and Detail.rpt
Time Compliance	Time Compliance.rpt
Unstaffed Allocations by Project Type	Unstaffed Allocations by Project Type.rpt
User Access Rights	User Access Rights.rpt
User License and Activity	User License and Activity.rpt

Crystal Report	Source File
Vendor Actuals and Allocations by Resource	Vendor Actuals and Allocations by Resource.rpt
Vendor Baseline vs. Plan by Resource	Vendor Baseline vs Plan by Resource.rpt
Vendor Time Review by Resource	Vendor Time Review by Resource.rpt

Xcelsius Dashboard Source Files

The Xcelsius design files (XLF) are included in the add-in and are available after the installation in the CA Clarity PPM downloads folder, <install>\webroot\downloads, in a zip file named CSP_Design_Files_for_Xcelsius_Dashboards.zip. The Xcelsius color schemes for the solution pack are also available in the same folder in a zip file named CSP_Clarity_Default_Color_Schemes.zip.

If you need to get the source files without installing the Clarity Solution Pack, you can go to support.ca.com and download the CSP source files from the Clarity Solution Pack page to your computer. The Clarity Solution Pack is at the following location on the support site: *CA Clarity Project & Portfolio Manager product page/Product Status section/Clarity Solution Pack link*. Extract the source files to a directory location.

The XLF and color schemes files require the SAP Business Objects Xcelsius client. The Xcelsius client can be downloaded and installed locally on your computer. See the *CA Clarity PPM Release Notes* for the supported Xcelsius client and see the *CA Clarity-Xcelsius Implementation Guide* for more information about Xcelsius.

The following source files are included:

Xcelsius Dashboard / Color Scheme	Source File
KPIs by Project Type	KPIs_by_Project_Type.xlf
Project Status	Project_Status.xlf
Resource Shortages and Allocations	Resource_Shortages_Allocations.xlf
Top 10 Vendor Analysis	Top_10_Vendor_Analysis.xlf
Top 50 Project Watchlist	Top_50_Project_Watchlist.xlf
CSP Clarity Default Color Scheme	CSP_Clarity_Default_Color_Scheme.xml

Chapter 2: Project Management

This section contains the following topics:

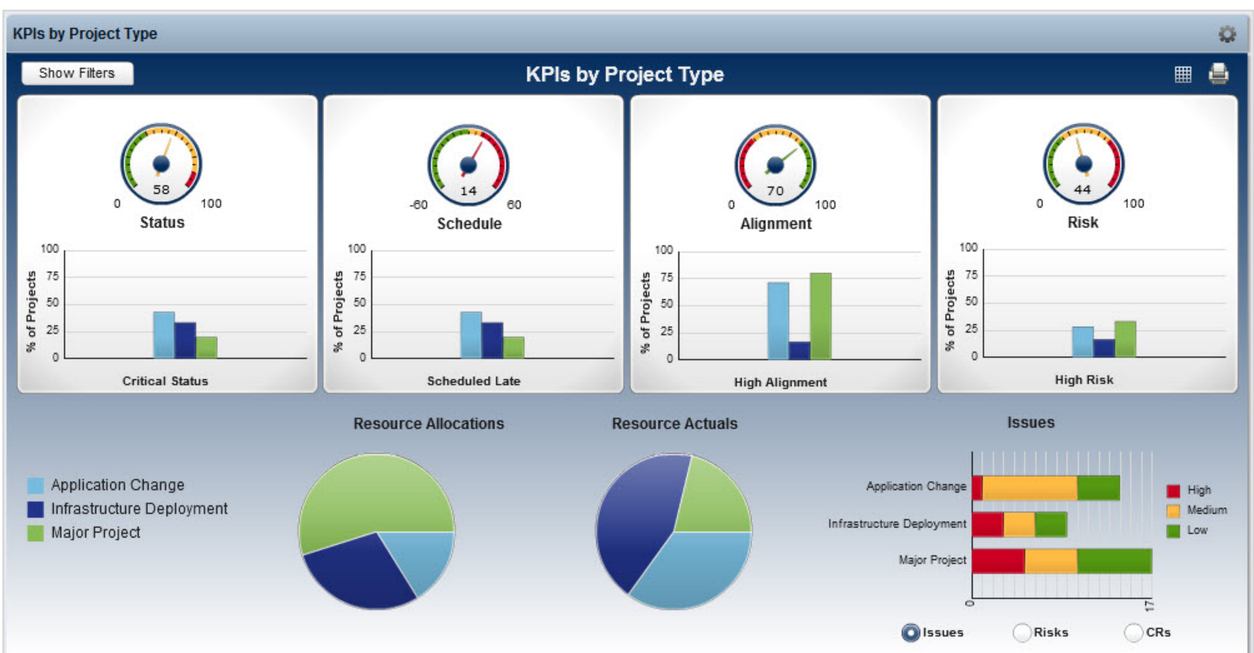
Xcelsius Dashboards

The project management dashboards provide visibility into the key performance indicators of status, schedule, alignment, and risk across projects in an organization. The dashboards allow you to view the performance of projects, categorized by project type. They also allow you to review the project progress via status reports, view staffing allocations, and identify upcoming staffing issues.

The dashboards include:

KPIs by Project Type

The KPIs by Project Type dashboard displays the key performance indicators of status, schedule, alignment, and risk as gauges, with column charts of these key indicators by project type. Resource allocation and actual hours are summarized by project type and displayed in pie charts. There is also an issue, risk, and change request bar chart that displays the number of each by project type and priority.



Dashboard Prerequisites:

- Projects must be associated to a project OBS because OBS is a required dashboard filter.
- The charts in the dashboard are grouped by the project type field on the projects so in order for the groupings to be relevant, the projects should have this field completed. If projects do not have a project type defined they will display on the dashboard as Undefined.
- The status is based on the most recent project status report so at least one status report must be completed on the projects for this indicator to calculate. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The business alignment and risk rating properties on the projects must be completed to calculate the alignment and risk indicators.
- Projects must have team members with allocation amounts to calculate resource allocations.
- Projects must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate resource actuals.

Portlet Definition:

Name:	KPIs by Project Type	
ID:	csp_prjKPIsByProjectType	
Type:	Interactive	
Dashboard File (.SWF):	KPIs_by_Project_Type.swf	
NSQL Query Providers:	KPIs by Project Type	csp.prjKPIsByProjectType
	KPIs by Project Type Labels	csp.prjKPIsByProjectTypeLabels
	Project OBS Types	csp.cmnPrjOBSTypes
	Project OBS Levels	csp.cmnPrjOBSLevels
	Project OBS Units	csp.cmnPrjOBSUnits

Dashboard Filters:

The data displayed in the dashboard can be filtered by the following:

Filter	Type Style	Query Name Query ID	Required Default Value
Project OBS	Pull-down Single-select	Project OBS Types csp.cmnPrjOBSTypes	Yes
OBS Level	Pull-down Single-select	Project OBS Levels csp.cmnPrjOBSLevels	Yes
OBS Unit	Pull-down Single-select	Project OBS Units csp.cmnPrjOBSUnits	Yes
Project Status	Pull-down Single-select		No All
Clarity User Internal ID p_user_id	Hidden		Yes Passed via Clarity

Dashboard Filter Values:

Project Status: All, Approved, Unapproved

Dashboard Filter Explanations:
The Project OBS filter allows you to control which projects are included in the dashboard calculations. When you select an OBS unit in this filter, the dashboard will include the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.

Dashboard Components and Calculations:
The dashboard includes gauge components combined with regular column charts showing KPI average values and percentage of projects with critical status, schedule late, high alignment and high risk, categorized by project type. Amounts and percentages of resource allocation hours as well as actual hours are represented in two pie charts. The dashboard also includes a bar chart showing the distribution of high, medium and low priorities of issues, risks and change requests, categorized by project type.

The charts view can be switched to the table view by clicking the Grid icon in the upper right corner of the dashboard and switched back by clicking the Chart icon. The table view displays, for each project type, the total number of projects, the number of projects with critical status, schedule late, high alignment, high risk, and resource allocations and actuals hours. The Detail button drills down to a detailed report described in this guide as the KPIs by Project Type report. When the Clarity Solution Pack add-in is first installed, the KPIs by Project Type report must be run once from the Reports and Jobs menu (*Home/Personal-Reports and Jobs*) before it is run by clicking on the Detail button in the dashboard. If the report is not run once from the Reports and Jobs menu, then the following error message will display when a user runs the report from the dashboard Detail button: "The database logon information for this report is either incomplete or incorrect". Running the report once from the menu sets the database login information and this must occur for the dashboard Detail button to work. After the report runs successfully one time, for one user, the dashboard Detail button will work for all users.

This dashboard contains the following calculations:

Status

The gauge needle displays the average overall status (sum of overall status divided by number of projects). This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report. Each of these fields is ranked as on track with a value of 10, minor variance with a value of 20, or significant variance with a value of 30. The gauge indicator displays the average overall status (sum of overall status divided by number of projects).

The Gauge color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

Database view and column:
odf_cop_prj_statusrpt_v2.cop_overall_status

Critical Status

This is the percent of projects with significant variance, when overall status is greater than or equal to 90, grouped by project type.

Schedule

The gauge needle displays the average schedule (sum of schedule divided by number of projects). The schedule is the number of days the project is late and considers the following:

- Whether or not a baseline exists
- Project progress

If a baseline exists, then days late is calculated as project finish date minus baseline finish date. A positive number indicates that the project is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project finish date is the same as the baseline finish date, then the project is considered late if it is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

If there is no baseline, then days late is calculated if the project is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

The Gauge color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 Days Late	> 0 and <= 10
Red	More Than 10 Days Late	> 10

Schedule Late

This is the percent of projects with number of days the project is late greater than 10 days, grouped by project type.

Alignment

The gauge needle displays the average business alignment (sum of business alignment divided by number of projects). The alignment indicator is the business alignment field on the project. The business alignment field is calculated as an average of the alignment factors completed on the project. Each of the alignment factors is ranked as low with a value of 25, medium with a value of 50, high with a value of 75, or very high with a value of 100.

The Gauge color is determined as follows:

Green	Good Alignment	>= 68
Yellow	Average Alignment	>= 34 and < 68
Red	Poor Alignment	< 34

Database view and column:

odf_project_v2.obj_alignment

High Alignment

This is the percent of projects with good alignment, when business alignment is greater than or equal to 68, grouped by project type.

Risk

The gauge needle displays the average risk (sum of risk divided by number of projects). The risk indicator is the risk field on the project. The risk field is calculated as the weighted average of the risk factors completed on the project. Each of the risk factors is ranked as low with a value of 0, medium with a value of 50, high with a value of 100.

The Gauge color is determined as follows:

Green	Low Risk	< 34
Yellow	Medium Risk	>= 34 and < 68
Red	High Risk	>= 68

Database view and column:

odf_project_v2.risk

High Risk

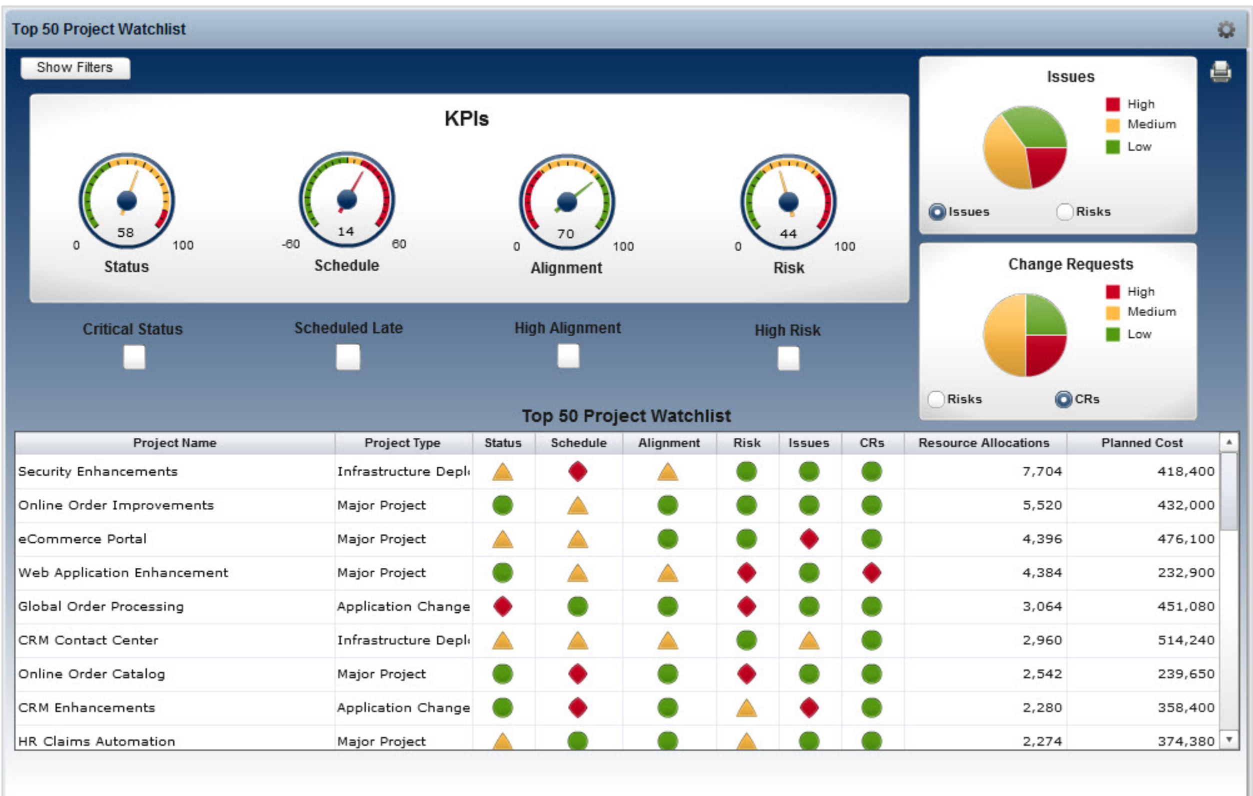
This is the percent of projects with high risk, when risk is greater than or equal to 68, grouped by project type.

Dashboard Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded	inv_projects.is_program = 0	
Templates are excluded	inv_projects.is_template = 0	
Closed and resolved issues, risks, and change requests are excluded	rim_risks_and_issues. status_code NOT IN ('CLOSED','RESOLVED')	

Top 50 Project Watchlist

The Top 50 Project Watchlist dashboard displays the fifty projects with the highest resource allocation amounts in your organization. The dashboard has gauges and projects listed in a table view, providing visibility into the key performance indicators of status, schedule, alignment, risk, issues and change requests. There are also pie charts that show the distribution of issues, risks, and change requests based on priority. There are four checkboxes for critical status, scheduled late, high alignment, and high risk that allow you to quickly filter the list to view the projects of most interest. For example, you can quickly view any projects that are highly aligned to the business that are scheduled late.



Dashboard Prerequisites:

- Projects must be associated to a project OBS because OBS is a required dashboard filter.
- The status is based on the most recent project status report so at least one status report must be completed on the projects for this indicator to calculate. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The business alignment and risk rating properties on the projects must be completed to calculate the alignment and risk indicators.
- Projects must have team members with allocation amounts to calculate resource allocations.

Portlet Definition:

Name:	Top 50 Project Watchlist	
ID:	csp_prjTop50WatchList	
Type:	Interactive	
Dashboard File (.SWF):	Top_50_Project_Watchlist.swf	
NSQL Query Providers:	Top 50 Watch List	csp.prjTop50WatchList
	Top 50 Watch List Labels	csp.prjTop50WatchListLabels

Project OBS Types	csp.cmnPrjOBSTypes
Project OBS Levels	csp.cmnPrjOBSLevels
Project OBS Units	csp.cmnPrjOBSUnits
Project Types	csp.cmnPrjOBSTypes

Dashboard Filters:
The data displayed in the dashboard can be filtered by the following:

Filter	Type Style	Query Name Query ID	Required Default Value
Project OBS	Pull-down Single-select	Project OBS Types csp.cmnPrjOBSTypes	Yes
OBS Level	Pull-down Single-select	Project OBS Levels csp.cmnPrjOBSLevels	Yes
OBS Unit	Pull-down Single-select	Project OBS Units csp.cmnPrjOBSUnits	Yes
Project Type	Pull-down Single-select	Project Types csp.cmnPrjTypes	No All
Project Status	Pull-down Single-select		No All
Clarity User Internal ID p_user_id	Hidden		Yes Passed via Clarity

Dashboard Filter Values:
Project Type: Major Project, Application Change, Infrastructure Deployment.
Project Status: All, Approved, Unapproved

Dashboard Filter Explanations:
- The Project OBS filter allows you to control which projects display in the dashboard. When you select an OBS unit in this filter, the dashboard will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select. These results are then ranked by the allocation amounts on each project and the top 50 projects, with the greatest number of allocation hours, are displayed.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

Dashboard Components and Calculations:
The dashboard includes gauge components showing KPI average values of status, schedule, alignment, and risk. The table view lists the projects with the highest resource allocations and can be narrowed down by checking projects with critical status, schedule late, high alignment and high risk, isolated or combined. The issue, risk and change request priority distribution is represented in two pie charts, which can also be combined to display different results. The Detail button displays when a project is selected, by clicking the project row, and it drills down to a detailed report described in this guide as the Project Status Detail report. When the Clarity Solution Pack add-in is first installed, the Project Status Detail report must be run once from the Reports and Jobs menu (*Home/Personal-Reports and Jobs*) before it is run by clicking on the Detail button in the dashboard. If the report is not run once from the Reports and Jobs menu, then the following error message will display when a user runs the report from the dashboard

Detail button: "The database logon information for this report is either incomplete or incorrect". Running the report once from the menu sets the database login information and this must occur for the dashboard Detail button to work. After the report runs successfully one time, for one user, the dashboard Detail button will work for all users.

This dashboard contains the following calculations:

Status

The gauge needle displays the average overall status (sum of overall status divided by number of projects). This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report. Each of these fields is ranked as on track with a value of 10, minor variance with a value of 20, or significant variance with a value of 30. The gauge indicator displays the average overall status (sum of overall status divided by number of projects).

The Gauge color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

Database view and column:

odf_cop_prj_statusrpt_v2.cop_overall_status

Critical Status

Displays projects with significant variance, when overall status is greater than or equal to 90.

Schedule

The gauge needle displays the average schedule (sum of schedule divided by number of projects). The schedule is the number of days the project is late and considers the following:

- Whether or not a baseline exists
- Project progress

If a baseline exists, then days late is calculated as project finish date minus baseline finish date. A positive number indicates that the project is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project finish date is the same as the baseline finish date, then the project is considered late if it is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

If there is no baseline, then days late is calculated if the project is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

The Gauge color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 Days Late	> 0 and <= 10
Red	More Than 10 Days Late	> 10

Schedule Late

Displays projects with number of days the project is late greater than 10 days.

Alignment	The gauge needle displays the average business alignment (sum of business alignment divided by number of projects). The alignment indicator is the business alignment field on the project. The business alignment field is calculated as an average of the alignment factors completed on the project. Each of the alignment factors is ranked as low with a value of 25, medium with a value of 50, high with a value of 75, or very high with a value of 100. **The Gauge color is determined as follows:** Green — Good Alignment — >= 68 Yellow — Average Alignment — >= 34 and < 68 Red — Poor Alignment — < 34 **Database view and column:** odf_project_v2.obj_alignment
High Alignment	Displays projects with good alignment, when business alignment is greater than or equal to 68.
Risk	The gauge needle displays the average risk (sum of risk divided by number of projects). The risk indicator is the risk field on the project. The risk field is calculated as the weighted average of the risk factors completed on the project. Each of the risk factors is ranked as low with a value of 0, medium with a value of 50, high with a value of 100. **The Gauge color is determined as follows:** Green — Low Risk — < 34 Yellow — Medium Risk — >= 34 and < 68 Red — High Risk — >= 68 **Database view and column:** odf_project_v2.risk
High Risk	Displays projects with high risk, when risk is greater than or equal to 68.

Dashboard Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded	inv_projects.is_program = 0	
Templates are excluded	inv_projects.is_template = 0	
Closed and resolved issues, risks, and change requests are excluded	rim_risks_and_issues. status_code NOT IN ('CLOSED','RESOLVED')	

Project Status

The Project Status dashboard displays the information necessary to communicate the status of a project based on the latest project status report. The trending graphical components are designed to show how the project is doing it terms of schedule, scope, cost and effort. The Project Status dashboard also displays a list of issues, and includes project resource allocation by OBS and financial information.

Dashboard Prerequisites:

- The Status Report Update and the Status Report Indicators are based on the most recent project status report so at least one status report must be completed on the project for this indicator to calculate. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The project must have team members with allocation amounts to calculate resource allocations.
- The project must have at least one financial plan and detailed planned costs.

Portlet Definition:

Name:	Project Status	
ID:	csp_prjStatus	
Type:	Interactive	
Dashboard File (.SWF):	Project_Status.swf	
NSQL Query Providers:	Project Status Detail	csp.prjStatusDetail
	Project Status Issues	csp.prjStatusIssues
	Project Status Hours	csp.prjStatusHours
	Project Status Financial Plan	csp.prjStatusFinancialPlan
	Project Status Labels	csp.prjStatusLabels
	Project Status Projects Filter	csp.prjStatusProjects
	Financial Period Type	csp.cmnFinPeriodType

Dashboard Filters:
The data displayed in the dashboard can be filtered by the following:

Filter	Type Style	Query Name Query ID	Required Default Value
Project	Pull-down Single-select	Project Status Projects Filter csp.prjStatusProjects	Yes
Clarity User Internal ID p_user_id	Hidden		Yes Passed via Clarity

Dashboard Filter Explanations:
The Project filter only displays projects that have at least one status report. If a project does not have any status reports, the project will not display in the project filter. The project filter also has a limit and only displays up to five hundred projects. The projects are listed alphabetically by project name and after reaching the limit of five hundred projects, the remaining projects will not display in the filter. The limit is in place for performance and usability reasons. This portlet is intended for a project manager with access to a subset of projects, implemented via security, in Clarity; it is not intended for a super user with access to all projects in Clarity.

Dashboard Components and Calculations:
The dashboard displays the project name, project type, project manager, project status, progress, project start date, project finish date, project baseline finish date, when a baseline exists, and the last status report date.

There are three links available. From the dashboard it is possible to go to the project properties page by clicking the Projects button, to the Status Reports list page by clicking the Status Reports button, and to the Issues list page by clicking the Issues button.

The trending components in the Status Report Indicators compare the results of the current status report to the results of a previous status report. If there is no previous status report or if there is no variance, the indicator will display a dash, instead of an arrow, and it will be yellow. Other results will display as follows:

Overall

This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report.

The trending color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

The trending arrow is determined as follows:

Up	Overall Status better than the previous Overall Status
Dash	No variance
Down	Overall Status worse than the previous Overall Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule	This is the schedule status field from the project status report. The schedule status is determined by the selection of the On Track, Minor Variance or Significant Variance status option. **The trending color is determined as follows:** Green — On Track — 10 Yellow — Minor Variance — 20 Red — Significant Variance — 30 **The trending arrow is determined as follows:** Up — Schedule Status is better than the previous Schedule Status Dash — No variance Down — Schedule Status is worse than the previous Schedule Status **Database view and column:** odf_cop_prj_statusrpt_v2.cop_schedule_status
Scope	This is the scope status field from the project status report. The scope status is determined by the selection of the On Track, Minor Variance or Significant Variance status option. **The trending color is determined as follows:** Green — On Track — 10 Yellow — Minor Variance — 20 Red — Significant Variance — 30 **The trending arrow is determined as follows:** Up — Scope Status is better than the previous Scope Status Dash — No variance Down — Scope Status is worse than the previous Scope Status **Database view and column:** odf_cop_prj_statusrpt_v2.cop_scope_status
Cost and Effort	This is the cost and effort status field from the project status report. The cost and effort status is determined by the selection of the On Track, Minor Variance or Significant Variance status option. **The trending color is determined as follows:** Green — On Track — 10 Yellow — Minor Variance — 20 Red — Significant Variance — 30 **The trending arrow is determined as follows:** Up — Cost and Effort Status is better than the previous Cost and Effort Status Dash — No variance Down — Cost and Effort Status is worse than the previous Cost and Effort Status **Database view and column:** odf_cop_prj_statusrpt_v2.cop_cost_eft_status

The dashboard also includes a gauge component displaying project schedule and a table view displaying project issues ordered by the highest priorities.

Schedule

The gauge needle displays the project schedule. The schedule is the number of days the project is late and considers the following:

- Whether or not a baseline exists
- Project progress

If a baseline exists, then days late is calculated as project finish date minus baseline finish date. A positive number indicates that the project is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project finish date is the same as the baseline finish date, then the project is considered late if it is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

If there is no baseline, then days late is calculated if the project is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

The Gauge color is determined as follows:

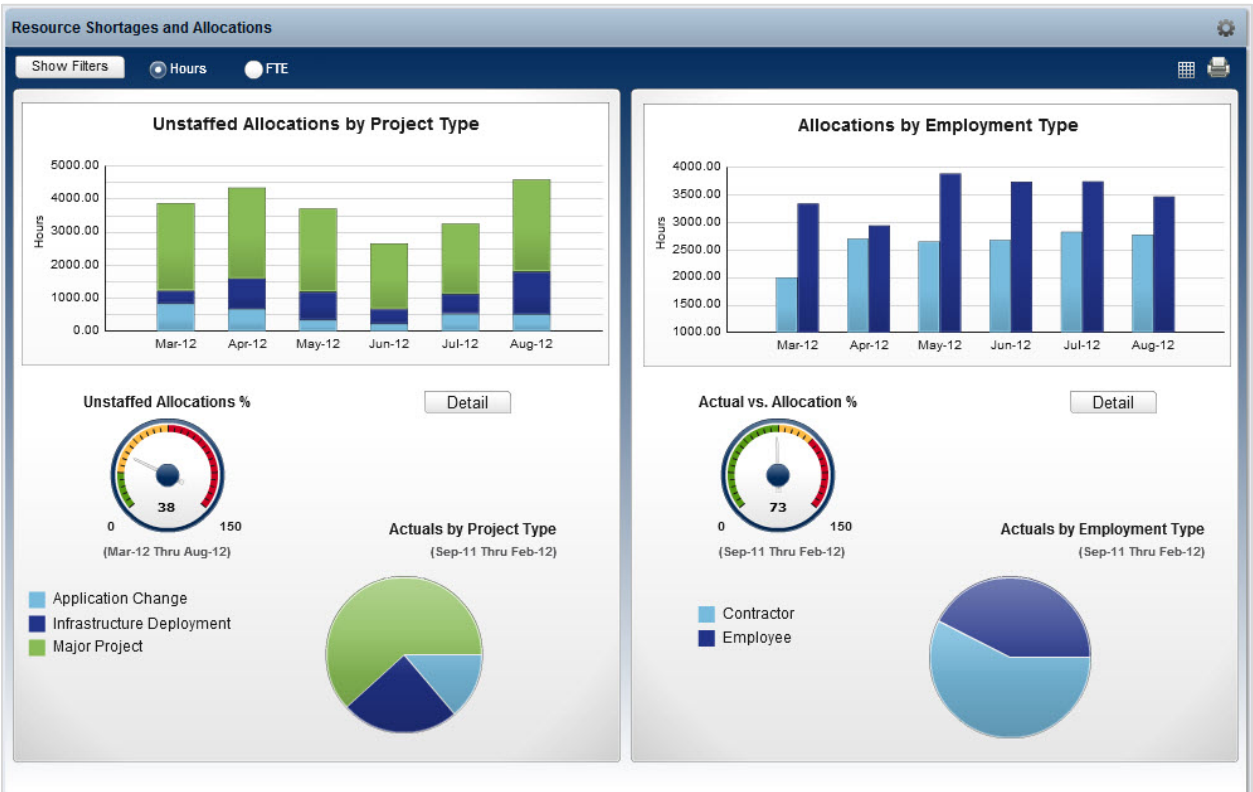
Green	On Schedule	<= 0
Yellow	Between 1 and 10 Days Late	> 0 and <= 10
Red	More Than 10 Days Late	> 10

Dashboard Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded	inv_projects.is_template = 0	
Closed and resolved issues, risks, and change requests are excluded	rim_risks_and_issues. status_code NOT IN ('CLOSED','RESOLVED')	

Resource Shortages and Allocations

The Resource Shortages and Allocations dashboard displays a side-by-side graphical view of unstaffed allocations, grouped by project type, and resource allocations, grouped by employment type. The dashboard gives visibility into resource shortages for unstaffed allocations and planned allocations of resources by employment type for the next six months, starting with the current month. The Resource Shortages and Allocations dashboard also displays pie charts of actual amounts by project type and by employment type. The amounts in this dashboard may be displayed as hours or FTEs.



Dashboard Prerequisites:

- Projects must be associated to a project OBS because OBS is a required dashboard filter.
- The charts in the dashboard are grouped by the project type field on the project and the employment type field on the resources, so in order for the groupings to be relevant, projects and resources should have these fields completed.
- Projects must have team members with allocation amounts to calculate resource allocations.
- Projects must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate resource actuals.
- The MONTHLYRESOURCEALLOCCURVE and MONTHLYRESOURCEACTCURVE time slices must be configured to cover the periods displayed in this dashboard or the dashboard will not display data for those periods. The allocation amounts are calculated based on the MONTHLYRESOURCEALLOCCURVE time slice and actual amounts are calculated based on the MONTHLYRESOURCEACTCURVE time slice.
- The time periods that display in the dashboard and the allocation amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data*

Administration-Time Slices). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Portlet Definition:

Name:	Resource Shortages and Allocations	
ID:	csp_prjUnstaffedAllocations	
Type:	Interactive	
Dashboard File (.SWF):	Resource_Shortages_Allocations.swf	
NSQL Query Providers:	Unstaffed Allocations	csp.prjAllocsUnstaffed
	Allocations by Employment Type	csp.prjAllocsStaffed
	Unstaffed and Allocations Labels	csp.prjAllocsStaffedLabels
	Project OBS Types	csp.cmnPrjOBSTypes
	Project OBS Levels	csp.cmnPrjOBSLevels
	Project OBS Units	csp.cmnPrjOBSUnits
	Project Types	csp.cmnPrjOBSTypes

Dashboard Filters:
The data displayed in the dashboard can be filtered by the following:

Filter	Type Style	Query Name Query ID	Required Default Value
Project OBS	Pull-down Single-select	Project OBS Types csp.cmnPrjOBSTypes	Yes
OBS Level	Pull-down Single-select	Project OBS Levels csp.cmnPrjOBSLevels	Yes
OBS Unit	Pull-down Single-select	Project OBS Units csp.cmnPrjOBSUnits	Yes
Project Type	Pull-down Single-select	Project Types csp.cmnPrjTypes	No All
Project Status	Pull-down Single-select		No All
Clarity User Internal ID p_user_id	Hidden		Yes Passed via Clarity

Dashboard Filter Values:
Project Type: Major Project, Application Change, Infrastructure Deployment.
Project Status: All, Approved, Unapproved

Dashboard Filter Explanations:

- The Project OBS filter allows you to control which projects are included in the dashboard calculations. When you select an OBS unit in this filter, the dashboard will include the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

Dashboard Components and Calculations:
The dashboard displays two column charts showing unstaffed allocations grouped by project type on the left side, and resource allocations grouped by employment type on the right side, for six months starting with the current month. The allocation amounts may be displayed as hours or FTEs.

The dashboard includes gauge components showing what percentage of allocations is unstaffed and what percentage of allocations has posted actuals. Amounts and percentages of actuals grouped by project type and by employment type are represented in two pie charts.

The gauge components will display as follows:

Unstaffed Allocations %

The gauge needle displays the percent of unstaffed allocations. Unstaffed projects are projects that have roles allocated to them as place holders for future resource allocations. It is calculated based on the amount of unstaffed allocations divided by the amount of allocations.

The Gauge color is determined as follows:

Green	Low	< 25
Yellow	Medium	>= 25 and < 75
Red	High	>= 75

Actuals vs. Allocation %

The gauge needle displays the percent of allocations with actuals posted thru timesheets, transaction entry, or imported into Clarity. It is calculated based on the amount of actuals divided by the amount of allocations.

The Gauge color is determined as follows:

Green	Low	< 75
Yellow	Medium	>= 75 and < 100
Red	High	>= 100

The charts view can be switched to the table view by clicking the Grid icon in the upper left corner of the dashboard, and switched back by clicking the Chart icon. The first table view displays, for each project type, the amounts of unstaffed allocations by month, for six months starting with the current month. The Detail button drills down to a detailed report described in this guide as the Unstaffed Allocations by Project Type report. The second table view displays, for each employment type, the allocation amounts by month, for six months starting with the current month. The Detail button drills down to a detailed report described in this guide as the Project Allocations by Employment Type report. When the Clarity Solution Pack add-in is first installed, the Unstaffed Allocations by Project Type and Project Allocations by Employment Type reports must be run once from the Reports and Jobs menu (*Home/Personal-Reports and Jobs*) before they are run by clicking on the Detail buttons in the dashboard. If the reports are not run once from the Reports and Jobs menu, then the following error message will display when a user runs the reports from the dashboard Detail buttons: “The database logon information for this report is either incomplete or incorrect”. Running the reports once from the menu sets the database login information and this must occur for the dashboard Detail buttons to work. After the reports run successfully one time, for one user, the dashboard Detail buttons will work for all users.

Dashboard Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Active projects are included.	Inv_investments.is_active = 1	Inactive projects are excluded.
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Topic	Database Statement	Additional Explanation
Roles only are included in the unstaffed allocations.	srm_resources.person_type = 0	Resources are excluded.
Resources only are included in the allocations by employment type.	srm_resources.person_type <> 0	Roles are excluded.
Labor and equipment roles or resources are included.	srm_resources.resource_type <= 1	Expense and material roles or resources are excluded.
The time periods that display in the dashboard and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this dashboard.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEALLOCCURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEACTCURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEAVAILCURVE'	Time slices with the names of MONTHLYRESOURCEALLOCCURVE, MONTHLYRESOURCEACTCURVE, and MONTHLYRESOURCEAVAILCURVE are required for this dashboard.

Crystal Reports

The project management reports provide visibility into the key performance indicators of status, schedule, alignment, and risk across projects in an organization. The reports also provide insight into schedule, cost, effort, risks, and issues in managing the projects. Several reports present status report information for monitoring project progress, while others offer analysis of staffing issues and comparisons of project plan performance compared to baseline.

The reports include:

KPIs by Project Type
Project Portfolio Summary
Project List
Project Planning Schedule
Project Schedule
Project Cost and Effort
Project Task Dependencies
Key Task and Milestone Status
Project Earned Value
Project Storyboard
Project Status Report List
Project Status Summary
Project Status Detail
Project Risk, Issue, and Change Summary
Project Risk Register
Project Issue Register
Project Change Request Register
Unstaffed Allocations by Project Type
Project Allocations by Employment Type
Investment Allocations and Assignments
Investment Assignments by Task
Investment Baseline vs. Plan by Task
Investment Time and Estimate Review

KPIs by Project Type

The KPIs by Project Type report lists projects, grouped by project type. It displays the key performance indicators of status, schedule, alignment, and risk along with resource allocation and actual hours from the inception of the project.

KPIs by Project Type

Project Name	Project Manager	Start Date	Finish Date	Status	Schedule	Alignment	Risk	Resource Allocations	Resource Actuals
Application Change									
CRM Enhancements	Reed, Henry	11/3/2011	3/5/2012	◆	✖	◆	⚠	2,280.00	1,496.00
Global Expense Application	McCarthy, John	1/2/2012	2/2/2012	✖	✖	◆	◆	90.00	35.00
Global Order Processing	Granger, Paula	5/8/2012	8/17/2012	✖	◆	◆	✖	3,064.00	0.00
HR Claims Enhancement	Sutherland, Joy	2/1/2012	5/22/2012	✖	◆	◆	⚠	1,600.00	0.00
Total								**7,034.00**	**1,531.00**
Infrastructure Deployment									
CRM Contact Center	Reed, Henry	10/3/2011	2/25/2012	⚠	⚠	⚠	◆	2,960.00	1,904.00
Financial Process Audit	Sutherland, Joy	2/1/2012	5/26/2012	⚠	⚠	✖	⚠	1,768.00	0.00
PCI Controls Remediation	Reed, Henry	2/1/2012	5/22/2012	⚠	◆	⚠	◆	1,160.00	0.00
Security Compliance	Sutherland, Joy	1/2/2012	2/2/2012	✖	✖	⚠	⚠	2,220.00	0.00
Total								**8,108.00**	**1,904.00**
Major Project									
Credit Card Processing	Martin, Paul	1/2/2012	2/3/2012	⚠	✖	◆	◆	800.00	32.00
eCommerce Portal	Martin, Paul	10/4/2011	10/8/2012	⚠	⚠	◆	◆	4,396.00	664.00
Financial Systems Integration	Tanner, Paul	3/13/2012	7/28/2012	✖	◆	◆	✖	1,728.00	0.00
HR Claims Automation	Granger, Paula	3/6/2012	12/3/2012	⚠	◆	◆	⚠	2,274.00	0.00
Online Customer Release	Sutherland, Joy	4/3/2012	8/3/2012	◆	✖	◆	⚠	2,184.00	0.00
Online Order Catalog	Martin, Paul	1/2/2012	2/24/2012	◆	✖	◆	✖	2,542.00	240.00
Online Order Entry	McCarthy, John	1/2/2012	4/19/2012	⚠	✖	⚠	✖	1,940.00	128.00
Order Management	Reed, Henry	9/5/2011	3/30/2012	⚠	⚠	◆	✖	2,052.95	0.00
Web Application Enhancement	Sutherland, Joy	1/2/2012	6/25/2012	◆	⚠	⚠	✖	4,384.00	0.00
Total								**22,300.95**	**1,064.00**
Grand Total								**37,442.95**	**4,499.00**

Report Prerequisites:

- The report is grouped by the project type field on the project so in order for the groupings to be relevant, the projects should have this field completed. If the project does not have a project type defined it will display on the report, but it will be in a section named Project Type Undefined.
- The status stoplight is based on the most recent project status report so at least one status report must be completed on the project for this indicator to calculate. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The business alignment and risk rating properties on the project must be completed to calculate the alignment and risk indicators.
- The project must have team members with allocation amounts to calculate resource allocations.
- The project must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate resource actuals.

Report Definition:

Name:	KPIs by Project Type
ID:	CSP_PRJ_KPIsByProjectType
Description:	KPIs by Project Type (CSP)
Executable Name:	/CSP/KPIs by Project Type

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

Report Fields and Calculations:
The report displays the project name, project manager, project start date, project finish date, status, schedule, alignment, risk, resource allocations, and resource actuals. Resource allocations and actuals include labor and equipment resources; expense and material resources are excluded.

The report is grouped by project type, which is an attribute on the project. The lookup associated to the project type attribute is a configurable lookup in Clarity. This means that lookup values may be added, modified, or deactivated for the purposes of managing projects in Clarity and grouping them in this report.

This report contains the following calculations:

Status

This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report. Each of these fields is ranked as on track with a value of 10, minor variance with a value of 20, or significant variance with a value of 30.

Status stoplight color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90
White	No overall status completed on the project status report	

Database view and column:
odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule

The schedule stoplight is the number of days the project is late and considers the following:

- Whether or not a baseline exists
- Project progress

If a baseline exists, then days late is calculated as project finish date minus baseline finish date. A positive number indicates that the project is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project finish date is the same as the baseline finish date, then the project is considered late if it is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

If there is no baseline, then days late is calculated if the project is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

Schedule stoplight color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 Days Late	> 0 and <= 10
Red	More Than 10 Days Late	> 10

Alignment

The alignment indicator is the business alignment field on the project. The business alignment field is calculated as an average of the alignment factors completed on the project. Each of the alignment factors is ranked as low with a value of 25, medium with a value of 50, high with a value of 75, or very high with a value of 100.

Alignment stoplight color is determined as follows:

Green	Good Alignment	>= 68
Yellow	Average Alignment	>= 34 and < 68
Red	Poor Alignment	< 34
White	No business alignment completed on the project	

Database view and column:
odf_project_v2.obj_alignment

Risk	The risk indicator is the risk field on the project. The risk field is calculated as the weighted average of the risk factors completed on the project. Each of the risk factors is ranked as low with a value of 0, medium with a value of 50, high with a value of 100.

Risk stoplight color is determined as follows:

Green	Low Risk	< 34
Yellow	Medium Risk	>= 34 and < 68
Red	High Risk	>= 68
White	No risk completed on the project	

Database view and column:

odf_project_v2.risk

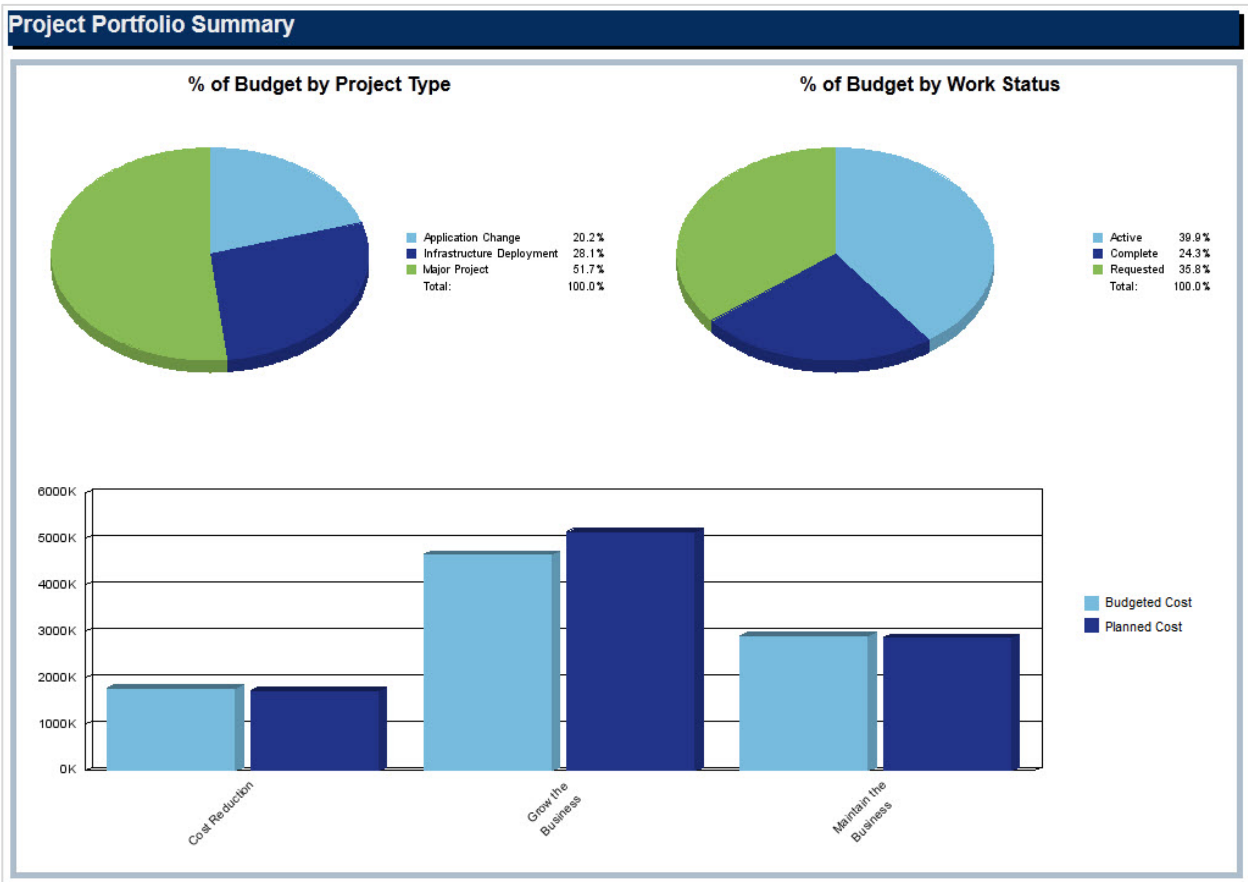
Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.

Project Portfolio Summary

The Project Portfolio Summary report includes three charts displaying the percentage of budget by project type, percentage of budget by work status, and a comparison of budgeted versus planned cost by grouping option. The report also includes a detail listing of projects with their status, alignment, risk, budget cost, planned cost, and variance. The comparison chart and detail listing have the following group by options: Portfolio Category, Goal, Project Type, Project Status, Business Owner, and OBS Level.



Report Page 1: Portfolio Summary Charts

Project Portfolio Summary

Project Name	Status	Work Status	Alignment	Risk	Budget Cost	Planned Cost	Variance	% Variance
Cost Reduction								
eCommerce Portal	Approved	Active			476,100.00	476,100.00	0.00	0.00
Online Order Performance Improvements	Approved	Requested			456,000.00	407,000.00	49,000.00	10.75
Security Compliance	Approved	Active			844,400.00	844,400.00	0.00	0.00
Total					**1,776,500.00**	**1,727,500.00**	**49,000.00**	**2.76**
Grow the Business								
CRM Contact Center Development	Approved	Complete			514,240.00	585,980.00	-71,740.00	-13.95
CRM Enhancements	Approved	Complete			358,400.00	482,930.00	-124,530.00	-34.75
ERP Integration	Approved	Active			250,000.00	275,000.00	-25,000.00	-10.00
Financial Systems Integration	Approved	Complete			300,000.00	305,000.00	-5,000.00	-1.67
Global Order Processing	Unapproved	Requested			434,000.00	451,080.00	-17,080.00	-3.94
Mobile Advertising	Approved	Active			378,400.00	378,400.00	0.00	0.00
Mobile Commerce	Approved	Requested			270,400.00	270,400.00	0.00	0.00
Mobile Security	Approved	Requested			884,900.00	934,900.00	-50,000.00	-5.65
Online Order Catalog	Approved	Active			189,650.00	239,650.00	-50,000.00	-26.36
Online Order Entry	Approved	Requested			600,000.00	734,000.00	-134,000.00	-22.33
Order Trending Analysis	Approved	Active			258,400.00	258,400.00	0.00	0.00
Web Application Enhancement	Unapproved	Requested			232,900.00	232,900.00	0.00	0.00
Total					**4,671,290.00**	**5,148,640.00**	**-477,350.00**	**-10.22**
Maintain the Business								
Client Services Application	Approved	Requested			214,800.00	214,800.00	0.00	0.00
Credit Card Processing Enhancement	Approved	Active			130,400.00	148,400.00	-18,000.00	-13.80
Financial Process Audit	Approved	Complete			389,040.00	389,040.00	0.00	0.00
Global Expense Application	Approved	Active			837,000.00	787,000.00	50,000.00	5.97
HR Claims Processing Enhancement	Unapproved	Requested			258,400.00	258,400.00	0.00	0.00
HR Online Benefits Security Upgrade	Approved	Active			374,380.00	374,380.00	0.00	0.00
XPL Translations	Approved	Complete			710,000.00	710,000.00	0.00	0.00
Total					**2,914,020.00**	**2,882,020.00**	**32,000.00**	**1.10**
Grand Total					**9,361,810.00**	**9,758,160.00**	**-396,350.00**	**-4.23**

Report Page 2: Portfolio Summary Detail

Report Prerequisites:

- The report pie charts are grouped by the project type and work status fields on the project so in order for the charts to be relevant, these fields must be completed. The column chart is grouped according to the Group By parameter, which is explained in the parameter section.
- The report displays projects that start or finish within the date range entered in the Portfolio Start Date and Portfolio Finish Date parameters. Specifically, the project start date must be the same as or before the date entered in the Portfolio Finish Date parameter. The project finish date must be the same as or after the date entered in the Portfolio Start Date parameter.
- The business alignment and risk rating properties on the project must be completed to calculate the alignment and risk indicators.
- The financial summary properties on the project must have budgeted cost and planned cost amounts entered to display the financial amounts and variances in the report. If the project has a detailed budget or cost plan created under the financial plans tab of the project, then the budgeted cost and planned cost amounts on the financial summary properties will be read only and set according to the amounts in the detailed financial plan. In this case, the approved budget amount or cost plan amount for the plan of record will display on the financial summary properties and in the report.

Report Definition:

Name:	Project Portfolio Summary
ID:	CSP_PRJ_PortfolioSummary
Description:	Project Portfolio Summary (CSP)
Executable Name:	/CSP/Project Portfolio Summary

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Portfolio Category 1 param_category1	Pull-down Single-select	Portfolio Category 1 OBJ_INVESTMENT_PFL_CATEGORY1	No
Portfolio Category 2 param_category2	Pull-down Single-select	Portfolio Category 2 OBJ_INVESTMENT_PFL_CATEGORY2	No
Portfolio Category 3 param_category3	Pull-down Single-select	Portfolio Category 3 OBJ_INVESTMENT_PFL_CATEGORY3	No
Portfolio Category 4 param_category4	Pull-down Single-select	Portfolio Category 4 OBJ_INVESTMENT_PFL_CATEGORY4	No
Goal param_goal	Pull-down Single-select	Investment Goal INVESTMENT_GOAL_TYPE	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Portfolio Start Date param_start_date	Relative Date		Yes Start of Current Year
Portfolio Finish Date param_end_date	Relative Date		Yes End of Current Year
Variance % Yellow Threshold param_y_thres	Text		No 0
Variance % Red Threshold param_r_thres	Text		No 0
Include Inactive Projects? param_i_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Group By param_group	Pull-down Single-select	Report (Categories, Goal, Project Type, Project Status, Business Owner, OBS Level) CSP_RPT_CMN_CAT_OBS_GROUP	Yes No Grouping
Show Graph? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Goal: Cost Avoidance, Cost Reduction, Grow the Business, Infrastructure Improvement, Maintain the Business
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Group By: No Grouping, Portfolio Category 1-4, Goal, Project Type, Project Status, Business Owner, OBS Level 1-10

Parameter Explanations:
- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Portfolio Category 1-4 parameters are associated to the Portfolio Category 1-4 lookups in Clarity. These lookups are configurable so lookup values may be added, modified, or deactivated.
- The Goal parameter is associated to the Investment Goal lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

- The Portfolio Start Date parameter determines which projects display in the report. The project finish date must be the same as or after the date entered in the Portfolio Start Date parameter for the project to display in the report.
- The Portfolio Finish Date parameter determines which projects display in the report. The project start date must be the same as or before the date entered in the Portfolio Finish Date parameter for the project to display in the report.
- The Variance % Yellow and Variance % Red Threshold parameters allow you to control when the background color changes to yellow and red, respectively, for the % Variance column in the report. The background color changes for both positive and negative variances. If the % Variance in the report is less than the Variance % Yellow Threshold, then there is no background color. If the % Variance is greater than or equal to the Variance % Yellow Threshold, then it will be yellow until it reaches the Variance % Red Threshold entered as a parameter. Amounts that are greater than or equal to the Variance % Red Threshold will be red. In the above screen capture, the Variance % Yellow Threshold parameter entered when running the report is 10% and the Variance % Red Threshold is 15%. Entering these parameter values means that the % Variance will turn yellow when it is greater than or equal a positive or negative 10% variance. It will turn red when it is greater than or equal to a positive or negative 15% variance.
- The report has a Group By parameter that allows you to control how the report is grouped. This parameter groups the budgeted and planned cost column chart. It also groups the projects in the body of the report. The following group options are available:

No Grouping	This option does not group the column chart or projects so you should select this value if you do not want to group the report.
Portfolio Category 1-4	This option groups the column chart and projects by portfolio category. The portfolio category fields are associated to lookups that do not include any values and should be configured to support your categorizations. The portfolio categories are configurable lookups so values may be added, modified, or deactivated.
Goal	This option groups the column chart and projects by goal. The values for goal are: Cost Avoidance, Cost Reduction, Grow the Business, Infrastructure Improvement, Maintain the Business. The goal is a configurable lookup so values may be added, modified, or deactivated.
Project Type	This option groups the column chart and projects by project type. The values for project type are: Major Project, Application Change, and Infrastructure Deployment. The project type is a configurable lookup so values may be added, modified, or deactivated.
Project Status	This option groups the column chart and projects by status. The values for project status are: Unapproved, Approved, On Hold, Rejected, Cancelled, and Resumed.
Business Owner	This option groups the column chart and projects by business owner.
OBS Level 1-10	This option groups the column chart and projects by OBS level and requires that you select a unit in the project OBS parameter in order to group by an OBS level. The project OBS parameter and grouping by an OBS level work in conjunction with one another. The project OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the projects attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report.

If you group by an OBS level that is lower in the hierarchy, then the report groups the projects by this level (e.g., OBS Level 4). If projects are associated to units above level 4 (e.g., projects are attached to levels 2 and 3), then the projects associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the project at the level by which you are grouping.

If you group by an OBS level but you do not select a unit in the project OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the project OBS parameter to determine which OBS to use for grouping.

- The Show Graph parameter controls whether the pie charts and column chart display in the report. If the parameter is checked, the charts will display on the first page of the report. If the parameter is not checked, the charts will not display.

Report Fields and Calculations:

If the report is grouped by project status, then the report displays the following columns: project name, business owner, work status, alignment, risk, budget cost, planned cost, variance, and % variance. If the report is grouped by any other option, then the report displays the following columns: project name, status, work status, alignment, risk, budget cost, planned cost, variance, and % variance. When the show graph parameter is checked, the report also includes two pie charts and a column chart. The pie charts display the percentage of budget cost, grouped by project type and work status. The column chart displays a comparison of budgeted cost to planned cost, aggregated by the group by parameter option selected when running the report.

This report contains the following calculations:

Alignment

The alignment indicator is the business alignment field on the project. The business alignment field is calculated as an average of the alignment factors completed on the project. Each of the alignment factors is ranked as low with a value of 25, medium with a value of 50, high with a value of 75, or very high with a value of 100.

Alignment stoplight color is determined as follows:

Green	Good Alignment	>= 68
Yellow	Average Alignment	>= 34 and < 68
Red	Poor Alignment	< 34
Gray	No business alignment completed on the project	

Database view and column:
odf_project_v2.obj_alignment

Risk

The risk indicator is the risk field on the project. The risk field is calculated as the weighted average of the risk factors completed on the project. Each of the risk factors is ranked as low with a value of 0, medium with a value of 50, high with a value of 100.

Risk stoplight color is determined as follows:

Green	Low Risk	< 34
Yellow	Medium Risk	>= 34 and < 68
Red	High Risk	>= 68
Gray	No risk completed on the project	

Database view and column:
odf_project_v2.risk

Variance	The variance field is the difference between budget cost and planned cost amounts. **Formula:** Budget Cost – Planned Cost
% Variance	The % variance field is the percentage of variance between budget cost and planned cost amounts. **% Variance background color is determined as follows:** Yellow — The % Variance is greater than or equal to the Variance % Yellow Threshold entered as a parameter. It will be yellow until it reaches the amount entered as the Variance % Red Threshold. The background color applies to both positive and negative variances. Red — The % Variance is greater than or equal to the Variance % Red Threshold entered as a parameter. The background color applies to both positive and negative variances. **Formula:** ((Budget Cost – Planned Cost) / Budget Cost) * 100

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	odf_project_v2.is_program = 0	
Templates are excluded.	odf_project_v2.is_template = 0	

Project List

The Project List report displays general information about the project such as manager, schedule dates, status, and business owner. The report may be grouped by several different options including: Portfolio Category, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, and OBS Level. The columns that display in the report change based on the grouping option selected.

Project List

Project Name	Project Manager	Start	Finish	Status	Work Status	Stage	Business Owner
Application Change							
CRM Enhancements	Reed, Henry	11/3/2011	12/31/2012	Approved	Complete	Closing	Roberts, Beth
Global Expense Application	Granger, Paula	1/2/2012	12/29/2012	Approved	Active	Building	Quinn, Randy
Global Order Processing	Tanner, Paul	1/1/2012	1/31/2013	Unapproved	Requested	Planning	Roberts, Beth
HR Claims Processing Enhancement	Sutherland, Joy	2/1/2012	9/29/2012	Unapproved	Requested	Planning	Tanner, Paul
Infrastructure Deployment							
CRM Contact Center Development	Reed, Henry	10/3/2011	3/5/2012	Approved	Complete	Closing	Roberts, Beth
Financial Process Audit	Sutherland, Joy	2/1/2012	5/26/2012	Approved	Complete	Closing	Roberts, Beth
Mobile Security	Granger, Paula	9/1/2011	9/1/2013	Approved	Requested	Planning	Roberts, Beth
Security Compliance	Tanner, Paul	1/2/2012	2/2/2012	Approved	Active	Building	Tanner, Paul
Security Enhancements	Tanner, Paul	1/1/2012	1/12/2013	Approved	Requested	Planning	Tanner, Paul
Major Project							
Client Services Application	Thompson, Peter	1/1/2012	12/31/2012	Approved	Requested	Planning	Quinn, Randy
Credit Card Processing Enhancement	Martin, Paul	1/2/2012	2/16/2013	Approved	Active	Building	Roberts, Beth
eCommerce Portal	Martin, Paul	10/4/2011	12/31/2012	Approved	Active	Building	Quinn, Randy
ERP Integration	Thompson, Peter	6/5/2012	9/29/2012	Approved	Active	Building	Roberts, Beth
Financial Systems Integration	Reed, Henry	3/13/2012	8/26/2012	Approved	Complete	Closing	Roberts, Beth
HR Online Benefits Security Upgrade	Granger, Paula	3/6/2012	12/3/2012	Approved	Active	Building	Tanner, Paul
Mobile Advertising	Thompson, Peter	12/12/2011	12/31/2012	Approved	Active	Building	Quinn, Randy
Mobile Commerce	Reed, Henry	4/3/2012	10/31/2012	Approved	Requested	Planning	Quinn, Randy
Online Order Catalog	Martin, Paul	1/2/2012	12/31/2012	Approved	Active	Building	Roberts, Beth
Online Order Entry	Granger, Paula	1/2/2012	12/31/2012	Approved	Requested	Planning	Quinn, Randy
Online Order Performance Improvements	Thompson, Peter	1/2/2012	3/30/2013	Approved	Requested	Planning	Roberts, Beth
Online to Offline Market	Tanner, Paul	9/5/2011	8/24/2012	Approved	Active	Building	Roberts, Beth
Order Trending Analysis	Tanner, Paul	2/1/2012	11/22/2012	Approved	Active	Building	Roberts, Beth
Web Application Enhancement	Sutherland, Joy	1/2/2012	3/30/2013	Unapproved	Requested	Planning	Roberts, Beth
XPL Translations	Tanner, Paul	1/1/2012	12/31/2012	Approved	Complete	Closing	Tanner, Paul

Report Example 1: Grouped by Project Type

Project List

Project Name	Start	Finish	Status	Work Status	Stage	Project Type	Business Owner
Granger, Paula							
Global Expense Application	1/2/2012	12/29/2012	Approved	Active	Building	Application Change	Quinn, Randy
HR Online Benefits Security Upgrade	3/6/2012	12/3/2012	Approved	Active	Building	Major Project	Tanner, Paul
Mobile Security	9/1/2011	9/1/2013	Approved	Requested	Planning	Infrastructure Deployment	Roberts, Beth
Online Order Entry	1/2/2012	12/31/2012	Approved	Requested	Planning	Major Project	Quinn, Randy
Martin, Paul							
Credit Card Processing Enhancement	1/2/2012	2/16/2013	Approved	Active	Building	Major Project	Roberts, Beth
eCommerce Portal	10/4/2011	12/31/2012	Approved	Active	Building	Major Project	Quinn, Randy
Online Order Catalog	1/2/2012	12/31/2012	Approved	Active	Building	Major Project	Roberts, Beth
Reed, Henry							
CRM Contact Center Development	10/3/2011	3/5/2012	Approved	Complete	Closing	Infrastructure Deployment	Roberts, Beth
CRM Enhancements	11/3/2011	12/31/2012	Approved	Complete	Closing	Application Change	Roberts, Beth
Financial Systems Integration	3/13/2012	8/26/2012	Approved	Complete	Closing	Major Project	Roberts, Beth
Mobile Commerce	4/3/2012	10/31/2012	Approved	Requested	Planning	Major Project	Quinn, Randy
Sutherland, Joy							
Financial Process Audit	2/1/2012	5/26/2012	Approved	Complete	Closing	Infrastructure Deployment	Roberts, Beth
HR Claims Processing Enhancement	2/1/2012	9/29/2012	Unapproved	Requested	Planning	Application Change	Tanner, Paul
Web Application Enhancement	1/2/2012	3/30/2013	Unapproved	Requested	Planning	Major Project	Roberts, Beth

Report Example 2: Grouped by Project Manager

Report Prerequisites:

- The project does not have any prerequisites to display in the report.
- The project properties must have fields such as project manager, work status, stage, project type, and business owner completed for them to display data in the report. The project name, start date, finish date, and status are required in Clarity so they will always display data.

Report Definition:

Name:	Project List
ID:	CSP_PRJ_ProjectList
Description:	Project List (CSP)
Executable Name:	/CSP/Project List

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Portfolio Category 1 param_category1	Pull-down Single-select	Portfolio Category 1 OBJ_INVESTMENT_PFL_CATEGORY1	No
Portfolio Category 2 param_category2	Pull-down Single-select	Portfolio Category 2 OBJ_INVESTMENT_PFL_CATEGORY2	No
Portfolio Category 3 param_category3	Pull-down Single-select	Portfolio Category 3 OBJ_INVESTMENT_PFL_CATEGORY3	No
Portfolio Category 4 param_category4	Pull-down Single-select	Portfolio Category 4 OBJ_INVESTMENT_PFL_CATEGORY4	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Include Inactive Projects? param_i_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Group By param_group	Pull-down Single-select	Report (Categories, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, OBS Level) CSP_RPT_CMN_CAT_OBS_MGR_GROUP	Yes No Grouping
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Group By: No Grouping, Portfolio Category 1-4, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, OBS Level 1-10

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Portfolio Category 1-4 parameters are associated to the Portfolio Category 1-4 lookups in Clarity. These lookups are configurable so lookup values may be added, modified, or deactivated.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group projects so you should select this value if you do not want to group the report.
Portfolio Category 1-4	This option groups the projects by portfolio category. The portfolio category fields are associated to lookups that do not include any values and should be configured to support your categorizations. The portfolio categories are configurable lookups so values may be added, modified, or deactivated.
Project Type	This option groups the projects by the project type. The values for project type are: Major Project, Application Change, and Infrastructure Deployment. The project type is a configurable lookup so values may be added, modified, or deactivated.
Project Status	This option groups the projects by project status. The values for project status are: Unapproved, Approved, On Hold, Rejected, Cancelled, and Resumed.
Work Status	This option groups the projects by work status. The values for work status are: Requested, Active, On Hold, Cancelled, and Complete. The work status is a configurable lookup so values may be added, modified, or deactivated.

Stage	This option groups the projects by stage. The stage is a configurable lookup so values may be added, modified, or deactivated. You can find the stage lookup by filtering on Lookup Name = 'Investment Type' or Source = 'Static Dependent List' (*Administration/Data Administration-Lookups*).
Project Manager	This option groups the projects by project manager.
Business Owner	This option groups the projects by business owner.
OBS Level 1-10	This option groups the projects by OBS level and requires that you select a unit in the project OBS parameter in order to group by an OBS level. The project OBS parameter and grouping by an OBS level work in conjunction with one another. The project OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the projects attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the projects by this level (e.g., OBS Level 4). If projects are associated to units above level 4 (e.g., projects are attached to levels 2 and 3), then the projects associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the project the level by which you are grouping. If you group by an OBS level but you do not select a unit in the project OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the project OBS parameter to determine which OBS to use for grouping.

Report Fields and Calculations:
If the report is not grouped or is grouped by portfolio category or OBS level, then the report displays the following columns: project name, project manager, start date, finish date, status, work status, stage, project type, and business owner. If the report is grouped by any other option, then the report displays the same columns excluding the column selected as the grouping option.

Report Security and Technical Details:
Security is determined by project view rights.

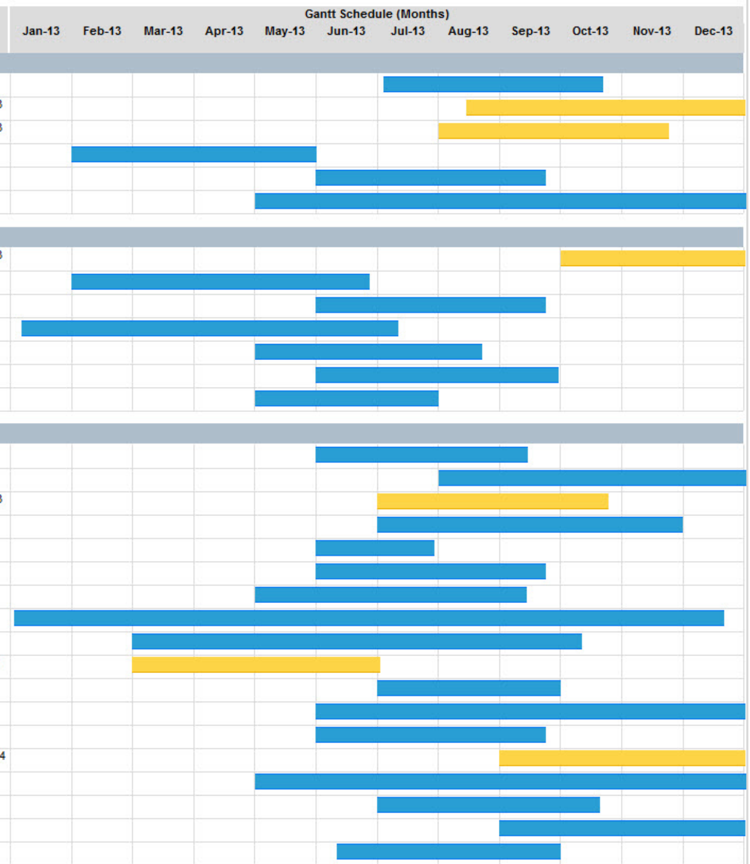
Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Project Planning Schedule

The Project Planning Schedule report lists projects and their Gantt schedule covering twelve time periods, which may be week, month, quarter, or year. The report may be run with or without a scenario applied and grouped by several different options including: Portfolio Category, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, and OBS Level. There is also an option when running the report to control the colors displayed in the Gantt schedule with portfolio category, project type, or work status.

Project Planning Schedule (Scenario: FY Funding Reduction)

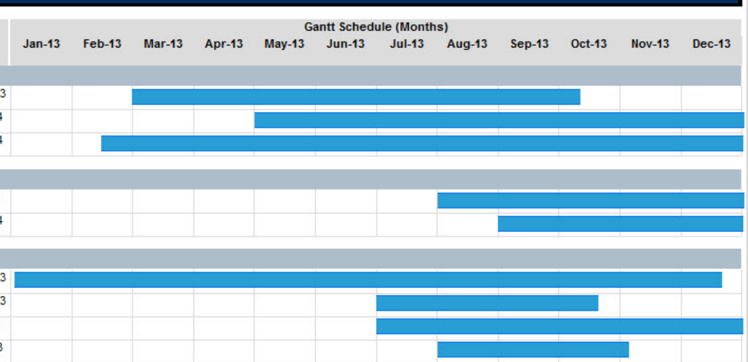
Project	Scenario Start	Original Start	Scenario Finish	Original Finish
Application Change				
Change Mgt for Internal Portal	7/4/2013		10/21/2013	
CRM Enhancements	8/15/2013	2/28/2013	1/13/2014	7/29/2013
Email SAN Storage Implementation	8/1/2013	6/1/2013	11/23/2013	9/23/2013
Global HR Application Maintenance	2/1/2013		5/31/2013	
HR Claims Processing Enhancement	6/1/2013		9/23/2013	
Mobile Time and Approvals	5/1/2013		3/14/2014	
Infrastructure Deployment				
Automated Security Enhancements	10/1/2013	6/1/2013	1/16/2014	9/16/2013
CRM Contact Center Development	2/1/2013		6/26/2013	
Financial Process Audit	6/1/2013		9/23/2013	
Mobile Security	1/7/2013		7/11/2013	
Online Order Performance Improvements	5/1/2013		8/22/2013	
PCI Controls Remediation	6/1/2013		9/29/2013	
Security Compliance	5/1/2013		7/31/2013	
Major Project				
4G Upgrade Readiness	6/1/2013		9/14/2013	
BYOD Management	8/1/2013		2/4/2014	
Client Services Datamart	7/1/2013	5/1/2013	10/24/2013	8/24/2013
Compliance Audit - Security	7/1/2013		11/30/2013	
Credit Card Processing Enhancement	6/1/2013		7/29/2013	
Credit Card Security Improvements	6/1/2013		9/23/2013	
Data Warehouse Performance Tuning	5/1/2013		9/13/2013	
eBusiness Mobile Network	1/3/2013		12/21/2013	
eCommerce Portal	3/1/2013		10/11/2013	
Executive Dashboard Visibility	3/1/2013	5/1/2013	7/2/2013	9/1/2013
Financial Workflow Development	7/1/2013		9/30/2013	
HR Online Benefits Security Upgrade	6/1/2013		1/30/2014	
Learning Portal Optimization	6/1/2013		9/23/2013	
Meeting Reservation Portal	9/1/2013	5/1/2013	3/2/2015	10/30/2014
Mobile Advertising	5/1/2013		5/16/2014	
Mobile Commerce	7/1/2013		10/20/2013	
Mobile Device Management (MDM) Deployment	9/1/2013		8/30/2014	
Mobile Identity Management Enhancements	6/11/2013		9/30/2013	



Report Example 1: Grouped by Project Type, with Scenario Applied

Project Planning Schedule

Project	Start	Finish
Active		
eCommerce Portal	3/1/2013	10/11/2013
Mobile Advertising	5/1/2013	5/16/2014
Office Upgrade	2/15/2013	2/14/2014
On Hold		
BYOD Management	8/1/2013	2/4/2014
Mobile Device Management (MDM) Deployment	9/1/2013	8/30/2014
Requested		
eBusiness Mobile Network	1/3/2013	12/21/2013
Mobile Commerce	7/1/2013	10/20/2013
MyLearning Mobile Pilot	7/1/2013	1/5/2014
Social Networking Security Upgrade	8/1/2013	11/4/2013



Report Example 2: Grouped by Work Status, with No Scenario Applied

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisite:
The project does not have any prerequisites to display in the report.

Report Definition:

Name:	Project Planning Schedule
ID:	CSP_PRJ_PlanningSchedule
Description:	Project Planning Schedule (CSP)
Executable Name:	/CSP/Project Planning Schedule

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Scenario param_scenario	Browse Single-select	Report (Scenarios) CSP_RPT_INV_SCENARIO	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Gantt Color param_color	Pull-down Single-select	Report (Categories, Project Type, Work Status) CSP_RPT_CMN_CAT_STATUS_COLOR	No
Gantt Start Date param_date	Relative Date		No Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month, Quarter, Year) CSP_RPT_CAL_PERIOD_TYPE	Yes Month
Only Include Projects Within Gantt Date Range? param_in_range	Checkbox		No Unchecked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Group By param_group	Pull-down Single-select	Report (Categories, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, OBS Level) CSP_RPT_CMN_CAT_OBS_MGR_GROUP	Yes No Grouping
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Gantt Color: Portfolio Category 1-4, Project Type, Work Status
Period Type: Week, Month, Quarter, Year
Group By: No Grouping, Portfolio Category 1-4, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, OBS Level 1-10

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Scenario parameter displays the scenarios to which you have security access. Scenarios may be created from the scenario widget in the upper right corner of the project properties or resource planning tabs (*Home/Resource Management-Resource Planning*). If a Scenario parameter is selected when running the report, then the Gantt schedule will be yellow for any projects with start or finish dates modified in the scenario and blue for the remaining projects.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The report has a Gantt Color parameter that allows you to determine how colors are displayed in the Gantt schedule. If no Gantt Color is selected, then the Gantt schedule is blue. If a Gantt Color parameter is selected when running the report, then the attribute selected determines the color of the Gantt schedule. The attribute must have a color display mapping defined (*Administration/Studio-Objects*) or the Gantt will be white. If a Gantt Color is selected, it takes precedence over the Scenario parameter and the Scenario parameter described above does not determine the Gantt color. The attributes available for the Gantt Color parameter are:

  Portfolio Category 1-4 The Gantt color is based on the display mappings of the Portfolio Category attributes. The Portfolio Category attributes are configurable attributes in the Investment object.

  Project Type The Gantt color is based on the display mappings of the Project Type attribute. The Project Type attribute is a configurable attribute in the Project object.

  Work Status The Gantt color is based on the display mappings of the Work Status attribute. The Work Status attribute is a configurable attribute in the Project object.

- The report has a Period Type parameter that allows you to change the display periods of the Gantt.

Week	The Gantt displays twelve weeks. Each week starts on the day of the week defined in the First Day of Work Week field in Clarity (*Administration/Project Management-Settings*).
Month	The Gantt displays twelve months.
Quarter	The Gantt displays twelve quarters.
Year	The Gantt displays twelve years.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group projects so you should select this value if you do not want to group the report.
Portfolio Category 1-4	This option groups the projects by portfolio category. The portfolio category fields are associated to lookups that do not include any values and should be configured to support your categorizations. The portfolio categories are configurable lookups so values may be added, modified, or deactivated.
Project Type	This option groups the projects by the project type. The values for project type are: Major Project, Application Change, and Infrastructure Deployment. The project type is a configurable lookup so values may be added, modified, or deactivated.
Project Status	This option groups the projects by project status. The values for project status are: Unapproved, Approved, On Hold, Rejected, Cancelled, and Resumed.
Work Status	This option groups the projects by work status. The values for work status are: Requested, Active, On Hold, Cancelled, and Complete. The work status is a configurable lookup so values may be added, modified, or deactivated.
Stage	This option groups the projects by stage. The stage is a configurable lookup so values may be added, modified, or deactivated. You can find the stage lookup by filtering on Lookup Name = 'Investment Type' or Source = 'Static Dependent List' (*Administration/Data Administration-Lookups*).
Project Manager	This option groups the projects by project manager.
Business Owner	This option groups the projects by business owner.
OBS Level 1-10	This option groups the projects by OBS level and requires that you select a unit in the project OBS parameter in order to group by an OBS level. The project OBS parameter and grouping by an OBS level work in conjunction with one another. The project OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the projects attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the projects by this level (e.g., OBS Level 4). If projects are associated to units above level 4 (e.g., projects are attached to levels 2 and 3), then the projects associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the project the level by which you are grouping.

If you group by an OBS level but you do not select a unit in the project OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the project OBS parameter to determine which OBS to use for grouping.

Report Fields and Calculations:

The report displays the project name, project start date, project finish date, and a twelve period Gantt schedule. If a scenario is selected when running the report, then the report displays the following columns: project name, scenario start date, original start date, scenario finish date, original finish date and a twelve period Gantt schedule. The scenario start and finish dates are the actual start and finish dates for projects not modified in the scenario and the 'what-if' start and finish dates for projects modified in the scenario. The original start and finish dates are the project dates before being modified via the scenario. Original dates only display if the dates have been modified in the scenario.

The Gantt schedule default color is blue. If a Scenario parameter is selected when running the report, then the Gantt schedule will be yellow for any projects with start or finish dates modified in the scenario and blue for the remaining projects. If a Gantt Color parameter is selected when running the report, then the attribute selected determines the color of the Gantt schedule. The attribute must have a color display mapping defined (*Administration/Studio-Objects*) or the Gantt will be white. If a Gantt Color is selected, it takes precedence over the Scenario parameter and the Scenario parameter does not determine the Gantt color.

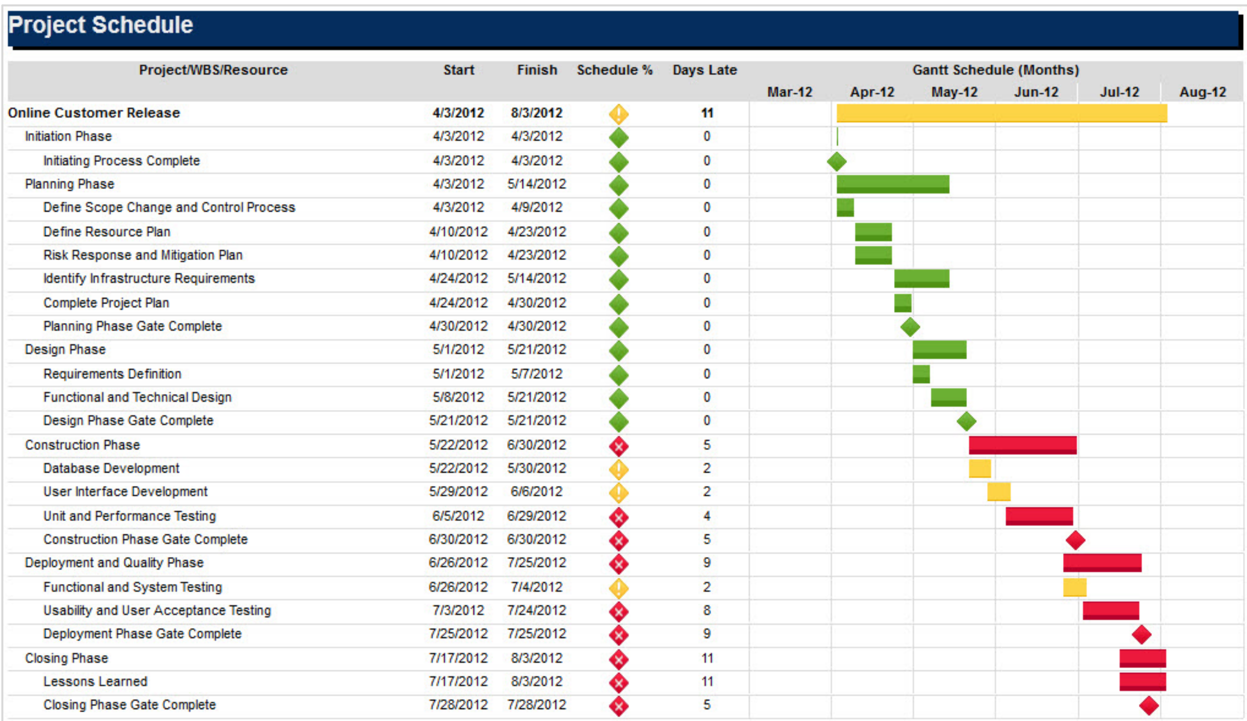
Report Security and Technical Details:

Security is determined by project view rights.

Topic	**Database Statement**	**Additional Explanation**
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Project Schedule

The Project Schedule report lists projects, with their work breakdown structure and resource assignments. If the project has subprojects, the subprojects also display. There is an option when running the report to control the level displayed in the report. The levels are: project, phase, task, or assignment. The below examples show two of those options. The report also includes a Gantt schedule covering six time periods, which may be week, month, quarter, or year.

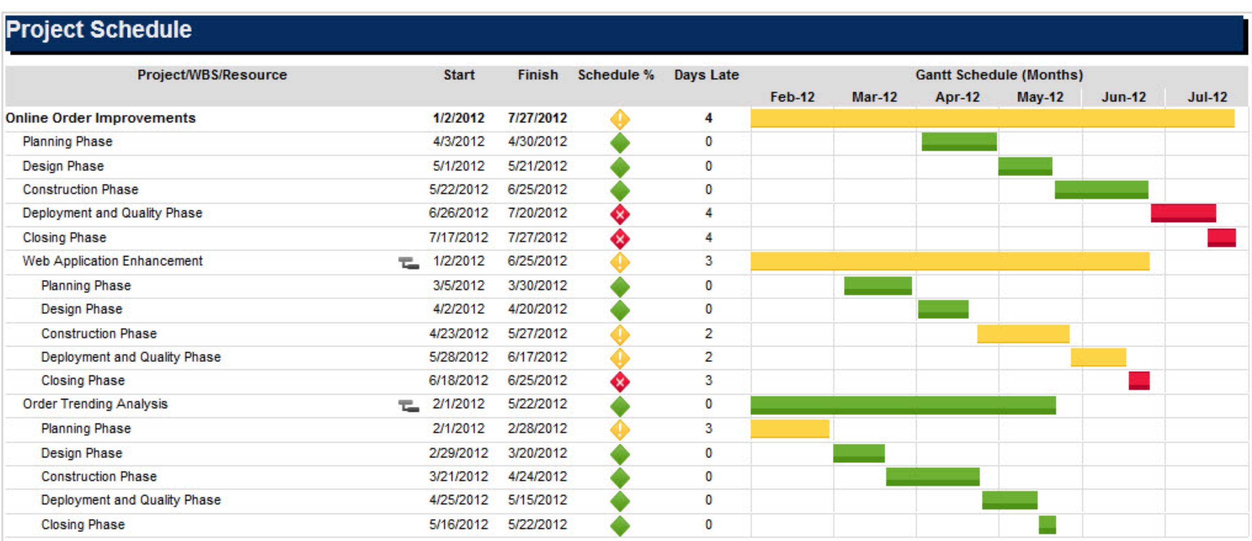


Project Schedule

Gantt Schedule (Months): Mar-12, Apr-12, May-12, Jun-12, Jul-12, Aug-12

Project/WBS/Resource	Start	Finish	Schedule %	Days Late
Online Customer Release	**4/3/2012**	**8/3/2012**		**11**
Initiation Phase	4/3/2012	4/3/2012		0
Initiating Process Complete	4/3/2012	4/3/2012		0
Planning Phase	4/3/2012	5/14/2012		0
Define Scope Change and Control Process	4/3/2012	4/9/2012		0
Define Resource Plan	4/10/2012	4/23/2012		0
Risk Response and Mitigation Plan	4/10/2012	4/23/2012		0
Identify Infrastructure Requirements	4/24/2012	5/14/2012		0
Complete Project Plan	4/24/2012	4/30/2012		0
Planning Phase Gate Complete	4/30/2012	4/30/2012		0
Design Phase	5/1/2012	5/21/2012		0
Requirements Definition	5/1/2012	5/7/2012		0
Functional and Technical Design	5/8/2012	5/21/2012		0
Design Phase Gate Complete	5/21/2012	5/21/2012		0
Construction Phase	5/22/2012	6/30/2012		5
Database Development	5/22/2012	5/30/2012		2
User Interface Development	5/29/2012	6/6/2012		2
Unit and Performance Testing	6/5/2012	6/29/2012		4
Construction Phase Gate Complete	6/30/2012	6/30/2012		5
Deployment and Quality Phase	6/26/2012	7/25/2012		9
Functional and System Testing	6/26/2012	7/4/2012		2
Usability and User Acceptance Testing	7/3/2012	7/24/2012		8
Deployment Phase Gate Complete	7/25/2012	7/25/2012		9
Closing Phase	7/17/2012	8/3/2012		11
Lessons Learned	7/17/2012	8/3/2012		11
Closing Phase Gate Complete	7/28/2012	7/28/2012		5

Report Example 1: Project Displayed at Task Level



Project Schedule

Gantt Schedule (Months): Feb-12, Mar-12, Apr-12, May-12, Jun-12, Jul-12

Project/WBS/Resource	Start	Finish	Schedule %	Days Late
Online Order Improvements	**1/2/2012**	**7/27/2012**		**4**
Planning Phase	4/3/2012	4/30/2012		0
Design Phase	5/1/2012	5/21/2012		0
Construction Phase	5/22/2012	6/25/2012		0
Deployment and Quality Phase	6/26/2012	7/20/2012		4
Closing Phase	7/17/2012	7/27/2012		4
Web Application Enhancement	1/2/2012	6/25/2012		3
Planning Phase	3/5/2012	3/30/2012		0
Design Phase	4/2/2012	4/20/2012		0
Construction Phase	4/23/2012	5/27/2012		2
Deployment and Quality Phase	5/28/2012	6/17/2012		2
Closing Phase	6/18/2012	6/25/2012		3
Order Trending Analysis	2/1/2012	5/22/2012		0
Planning Phase	2/1/2012	2/28/2012		3
Design Phase	2/29/2012	3/20/2012		0
Construction Phase	3/21/2012	4/24/2012		0
Deployment and Quality Phase	4/25/2012	5/15/2012		0
Closing Phase	5/16/2012	5/22/2012		0

Report Example 2: Master Project with Subprojects, Displayed at Phase Level

Report Prerequisite:
The project does not have any prerequisites to display in the report. In order for the WBS and resources to display in the report, the project must have tasks with resource assignments in the Gantt.

Report Definition:

Name:	Project Schedule
ID:	CSP_PRJ_ProjectSchedule
Description:	Project Schedule (CSP)
Executable Name:	/CSP/Project Schedule

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Detail Level param_level	Pull-down Single-select	Report (Project, Phase, Task, Assignment) CSP_RPT_PRJ_DETAIL_LEVEL	Yes Assignment
Gantt Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month, Quarter, Year) CSP_RPT_CAL_PERIOD_TYPE	Yes Month
Only Include Tasks Within Gantt Date Range? param_in_range	Checkbox		No Unchecked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete

Detail Level: Project, Phase, Task, Assignment
Period Type: Week, Month, Quarter, Year

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The report has a Detail Level parameter that allows you to control how much of the work breakdown structure you display in the report. The Detail Level parameter works as follows:

Project	Projects and subprojects display.
Phase	Projects, subprojects, and summary tasks at the top level of the work breakdown structure display. Summary tasks are tasks which have at least one child task or subproject in the work breakdown structure.
Task	Projects, subprojects, summary tasks, and detail tasks display. Summary tasks are tasks that have at least one child task or subproject in the work breakdown structure. Detail tasks are tasks that do not have any child tasks or subprojects.
Assignments	Projects, subprojects, summary tasks, detail tasks, and resource assignments on detail tasks display.

- The report has a Period Type parameter that allows you to change the display periods of the Gantt.

Week	The Gantt displays six weeks. Each week starts on the day of the week defined in the First Day of Work Week field in Clarity (*Administration/Project Management-Settings*).
Month	The Gantt displays six months.
Quarter	The Gantt displays six quarters.
Year	The Gantt displays six years.

Report Fields and Calculations:

The report displays the project name, work breakdown structure phase or task name, assigned resource name, project start date, project finish date, schedule % indicator, days late, and a six period Gantt schedule. The Gantt color is determined by the schedule % for the project, phases, and tasks. The Gantt color at the assignment level is gray because schedule % is not calculated at the assignment level.

If the project has a subproject, then the subproject will display in the report and is identified with a subproject icon to the right of the subproject name. The work breakdown structure and assigned resources of the subproject also display.

This report contains the following calculations:

Schedule %	**Project calculation:** Displays a stoplight indicating days late as a percentage of the project timeframe, which is finish date minus start date. The calculation takes into account the project progress and baseline (if a baseline exists). The color of the stoplight indicates if the project is on schedule or late. **Task calculation:** Displays a stoplight indicating days late as a percentage of the summary task or project timeframe, which is finish date minus start date. If the task has a parent task in the WBS, then the parent task timeframe is used in the calculation. If the task is at the top level of the WBS and does not have a parent task, then the project timeframe is used in the calculation.

The task calculation takes into account the task status and baseline (if a baseline exists). The color of the stoplight indicates if the task is on schedule or late.

Assignment calculation: There is no calculation for resource assignments so the schedule % stoplight does not display for resources.

Schedule % stoplight and Gantt bar color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 % Late	> 0 and <= 10
Red	More Than 10 % Late	> 10
Gray	Assignment level Gantt bar is gray	

Days Late

Days late displays the number of days late considering the following:

- Whether or not a baseline exists
- Project progress or task status

If a baseline exists, then days late is calculated as project or task finish date minus baseline finish date. A positive number indicates that the project or task is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project or task finish date is the same as the baseline finish date, then the project or task is considered late if it is not completed and it was due before today’s date. In this case, days late is calculated as today’s date minus project or task finish date.

If there is no baseline, then days late is calculated if the project or task is not completed and it was due before today’s date. In this case, days late is calculated as today’s date minus project or task finish date.

There is no calculation for resource assignments so the days late will not be populated.

Schedule stoplight color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 Days Late	> 0 and <= 10
Red	More Than 10 Days Late	> 10

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Project Cost and Effort

The Project Cost and Effort report lists projects, with their work breakdown structure and resource assignments. If the project has subprojects, the subprojects also display. There is an option when running the report to control the level displayed in the report. The levels are: project, phase, task, or assignment. The below examples show two of those options. The report displays baseline, actual, EAC, and projected cost and effort variance amounts.

Project Cost and Effort

Project/WBS/Resource	BAC Cost	Actual Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %	BAC	Actuals	EAC	Projected Effort Variance	Projected Effort Variance %
eCommerce Portal	**646,000.00**	**106,600.00**	**664,100.00**	**18,100.00**		**3,992.00**	**664.00**	**4,112.00**	**120.00**	
Planning Phase	77,200.00	77,200.00	77,200.00	0.00		468.00	468.00	468.00	0.00	
Define Scope Change Process	1,600.00	1,600.00	1,600.00	0.00		8.00	8.00	8.00	0.00	
Travel Expense	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Define Resource Plan	16,000.00	16,000.00	16,000.00	0.00		80.00	80.00	80.00	0.00	
Risk Response and Mitigation Plan	27,000.00	27,000.00	27,000.00	0.00		180.00	180.00	180.00	0.00	
Identify Storage Requirements	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Identify Infrastructure Requirements	6,600.00	6,600.00	6,600.00	0.00		40.00	40.00	40.00	0.00	
Complete Project Plan	26,000.00	26,000.00	26,000.00	0.00		160.00	160.00	160.00	0.00	
Planning Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Design Phase	362,500.00	29,400.00	374,300.00	11,800.00		2,114.00	196.00	2,194.00	80.00	
Requirements Definition	286,000.00	29,400.00	297,800.00	11,800.00		1,884.00	196.00	1,964.00	80.00	
Functional and Technical Design	36,500.00	0.00	36,500.00	0.00		230.00	0.00	230.00	0.00	
Hardware Acquisition	40,000.00	0.00	40,000.00	0.00		0.00	0.00	0.00	0.00	
Design Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Construction Phase	127,300.00	0.00	133,600.00	6,300.00		910.00	0.00	950.00	40.00	
Database Development	12,000.00	0.00	12,000.00	0.00		80.00	0.00	80.00	0.00	
User Interface Development	6,000.00	0.00	6,000.00	0.00		40.00	0.00	40.00	0.00	
Unit and Performance Testing	109,300.00	0.00	115,600.00	6,300.00		790.00	0.00	830.00	40.00	
Construction Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Deployment and Quality Phase	65,000.00	0.00	65,000.00	0.00		420.00	0.00	420.00	0.00	
Functional and System Testing	17,000.00	0.00	17,000.00	0.00		120.00	0.00	120.00	0.00	
Usability and User Acceptance Testing	14,000.00	0.00	14,000.00	0.00		80.00	0.00	80.00	0.00	
User Training Plan	8,400.00	0.00	8,400.00	0.00		60.00	0.00	60.00	0.00	
Train the Trainer Classes	13,600.00	0.00	13,600.00	0.00		80.00	0.00	80.00	0.00	
Trainer Certification and User Validation	12,000.00	0.00	12,000.00	0.00		80.00	0.00	80.00	0.00	
Deployment Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	
Closing Phase	14,000.00	0.00	14,000.00	0.00		80.00	0.00	80.00	0.00	
Lessons Learned	14,000.00	0.00	14,000.00	0.00		80.00	0.00	80.00	0.00	
Closing Phase Gate Complete	0.00	0.00	0.00	0.00		0.00	0.00	0.00	0.00	

Report Example 1: Project Displayed at Task Level

Project Cost and Effort

Project/WBS/Resource	BAC Cost	Actual Cost	EAC Cost	Projected Cost Variance	Projected Cost Variance %	BAC	Actuals	EAC	Projected Effort Variance	Projected Effort Variance %
Online Order Improvements	**258,400.00**	**0.00**	**258,400.00**	**0.00**		**1,600.00**	**0.00**	**1,600.00**	**0.00**	
Planning Phase	81,600.00	0.00	81,600.00	0.00		480.00	0.00	480.00	0.00	
Design Phase	57,600.00	0.00	57,600.00	0.00		360.00	0.00	360.00	0.00	
Construction Phase	65,400.00	0.00	65,400.00	0.00		440.00	0.00	440.00	0.00	
Deployment and Quality Phase	39,800.00	0.00	39,800.00	0.00		240.00	0.00	240.00	0.00	
Closing Phase	14,000.00	0.00	14,000.00	0.00		80.00	0.00	80.00	0.00	
Web Application Enhancement	232,800.00	0.00	236,480.00	3,680.00		1,440.00	0.00	1,480.00	40.00	
Planning Phase	75,600.00	0.00	75,600.00	0.00		440.00	0.00	440.00	0.00	
Design Phase	38,000.00	0.00	38,000.00	0.00		240.00	0.00	240.00	0.00	
Construction Phase	65,400.00	0.00	65,400.00	0.00		440.00	0.00	440.00	0.00	
Deployment and Quality Phase	39,800.00	0.00	45,800.00	6,000.00		240.00	0.00	280.00	40.00	
Closing Phase	14,000.00	0.00	11,680.00	-2,320.00		80.00	0.00	80.00	0.00	
Order Trending Analysis	258,400.00	0.00	258,400.00	0.00		1,600.00	0.00	1,600.00	0.00	
Planning Phase	81,600.00	0.00	81,600.00	0.00		480.00	0.00	480.00	0.00	
Design Phase	57,600.00	0.00	57,600.00	0.00		360.00	0.00	360.00	0.00	
Construction Phase	65,400.00	0.00	65,400.00	0.00		440.00	0.00	440.00	0.00	
Deployment and Quality Phase	39,800.00	0.00	39,800.00	0.00		240.00	0.00	240.00	0.00	
Closing Phase	14,000.00	0.00	14,000.00	0.00		80.00	0.00	80.00	0.00	

Report Example 2: Master Project with Subprojects, Displayed at Phase Level

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- The project does not have any prerequisites to display in the report. In order for the cost and effort amounts to display data in the report, the project must have at least one task and resource assignment.
- There must be a rate matrix created (*Administration/Finance-Manage Matrix*) and associated as a system default rate matrix (*Administration/Finance-Setup/Defaults/Project Transaction Entry Defaults*) or a project specific rate matrix for calculation of cost amounts.
- The project must have a baseline for BAC Cost, Projected Cost Variance, Projected Cost Variance %, BAC, Projected Effort Variance, and Projected Effort Variance % to display data in the report.
- The project, phase, and task level cost amounts are dependent upon running the *Update Cost Totals* job. This job is available in the Actions pull-down on the task list or baseline list. The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.
- The assignment level EAC cost, Projected Cost Variance, and Projected Cost Variance % are dependent upon the data mart rate table (nbi_proj_res_rates_and_costs) being populated to calculate the ETC cost portion of EAC cost. This table is populated by running the *Rate Matrix Extraction* job.

Report Definition:

Name:	Project Cost and Effort
ID:	CSP_PRJ_ProjectCostAndEffort
Description:	Project Cost and Effort (CSP)
Executable Name:	/CSP/Project Cost and Effort

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Detail Level param_detail	Pull-down Single-select	Report (Project, Phase, Task, Assignment) CSP_RPT_PRJ_DETAIL_LEVEL	Yes Assignment
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Detail Level: Project, Phase, Task, Assignment

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The report has a Detail Level parameter that allows you to control how much of the work breakdown structure you display in the report. The Detail Level parameter works as follows:

Project	Projects and subprojects display.
Phase	Projects, subprojects, and summary tasks at the top level of the work breakdown structure display. Summary tasks are tasks which have at least one child task or subproject in the work breakdown structure.
Task	Projects, subprojects, summary tasks, and detail tasks display. Summary tasks are tasks that have at least one child task or subproject in the work breakdown structure. Detail tasks are tasks that do not have any child tasks or subprojects.
Assignments	Projects, subprojects, summary tasks, detail tasks, and resource assignments on detail tasks display.

Report Fields and Calculations:
The report displays the project name, work breakdown structure phase or task name, assigned resource name, cost amounts and effort amounts. The cost and effort amounts include: BAC, actual, EAC, projected variance, and projected variance %. The cost amounts at the project, phase, task, and assignment level include labor and non-labor. The effort amounts at the project, phase, and task level include labor only. The effort amounts at the assignment level include labor and non-labor. This is consistent with how Clarity displays these amounts on the project, task and assignment properties.

If the project has a subproject, then the subproject will display in the report and is identified with a subproject icon to the right of the subproject name. The work breakdown structure and assigned resources of the subproject also display.

This report contains the following calculations:

Projected Cost Variance

The projected cost variance field is on the project and displays the variance between the EAC cost and baseline cost.

Formula:
((ETC Cost + Actual Cost (ACWP)) - BAC Cost)

Database view and column:
odf_project_v2. obj_cost_amt_var

Projected Cost Variance %

The projected cost variance % field is on the project and displays a stoplight indicating the projected cost variance as a percentage of BAC cost.

Projected Cost Variance % stoplight color is determined as follows:

Green	The EAC cost is less than or equal to the baseline.
Yellow	The EAC cost is between one and ten percent over baseline.
Red	The EAC cost is more than ten percent over baseline.
Gray	No baseline data exists.

Formula:
(((ETC Cost + Actual Cost (ACWP)) - BAC Cost) / BAC Cost) * 100

Database view and column:
odf_project_v2. obj_cost_pct_var

Projected Effort Variance

The projected effort variance field is on the project and displays the variance between the EAC effort and baseline effort.

Formula:
(EAC Effort – BAC Effort)

Database view and column:
odf_project_v2. obj_effort_amt_var

Projected Effort Variance %

The projected effort variance % field is on the project and displays a stoplight indicating the projected effort variance as a percentage of BAC effort.

Projected Effort Variance % stoplight color is determined as follows:

Green	The EAC effort is less than or equal to the baseline.
Yellow	The EAC effort is between one and ten percent over baseline.
Red	The EAC effort is more than ten percent over baseline.
Gray	No baseline data exists.

Formula:
((EAC Effort – BAC Effort) / BAC Effort) * 100

Database view and column:
odf_project_v2. obj_effort_var

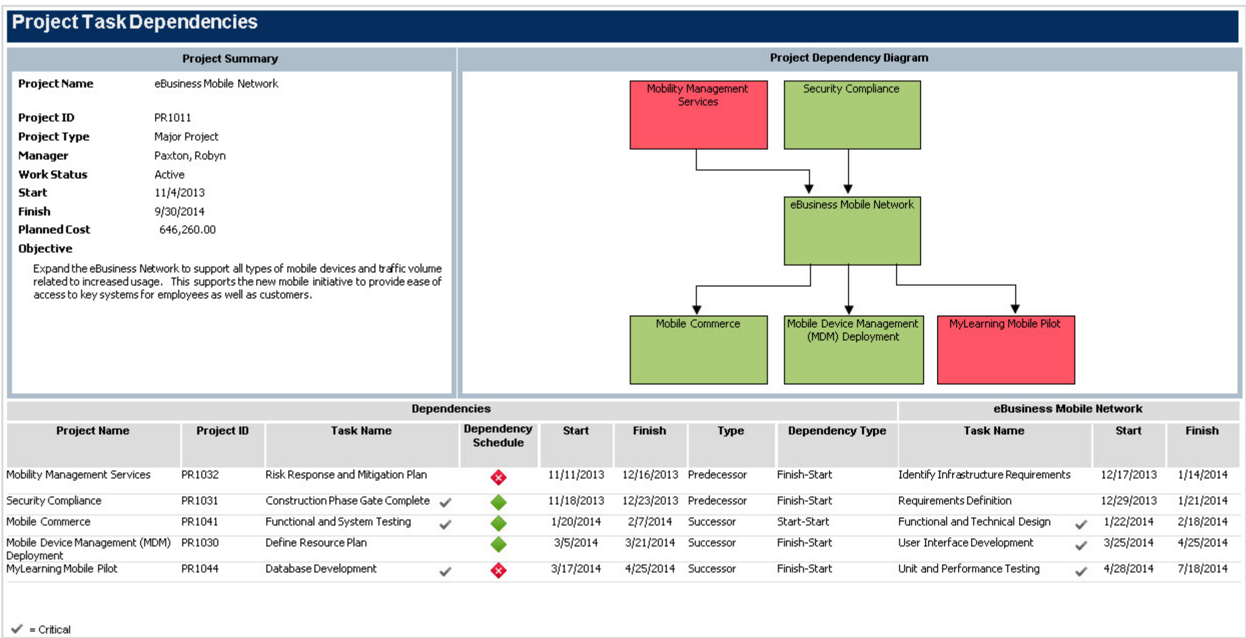
Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Topic	Database Statement	Additional Explanation
Project, phase, and task level cost amounts are dependent upon running the *Update Cost Totals* job, which is available in the Actions pull-down on the task list or baseline list on a project. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu.	The cost amounts in the project, task, and assignment ODF (Object Description Framework) views are updated when running the *Update Cost Totals* job or the *Update Earned Value Totals* job. The views referenced in the query for cost amounts are: odf_project_v2, odf_task_v2, and odf_assignment_v2.	The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.
The assignment level EAC cost, Projected Cost Variance, and Projected Cost Variance % are dependent upon the data mart rate table being populated.	nbi_proj_res_rates_and_costs.project_id = inv_investments.id AND nbi_proj_res_rates_and_costs.task_id = odf_task_v2.odf_pk AND nbi_proj_res_rates_and_costs.resource_id = odf_assignment_v2.odf_pk AND odf_assignment_v2.prFinish BETWEEN nbi_proj_res_rates_and_costs.from_date AND nbi_proj_res_rates_and_costs.to_date	This table is populated by running the *Rate Matrix Extraction* job.

Project Task Dependencies

The Project Task Dependencies report displays projects and their inter-project task dependency relationships. This gives you visibility between your project and dependent tasks in other projects. The report displays predecessor and successor dependencies as a diagram, as well as a detailed list. The diagram displays a maximum of five predecessor and five successor inter-project dependencies. The detailed list does not have this limit and shows all inter-project task dependencies. The report contains project summary and task information, including a dependency schedule stoplight and dependency type. It also includes a checkmark icon indicating that the task or dependent task is on the critical path.



Project Task Dependencies

Project Summary

Project Name	eBusiness Mobile Network
Project ID	PR1011
Project Type	Major Project
Manager	Paxton, Robyn
Work Status	Active
Start	11/4/2013
Finish	9/30/2014
Planned Cost	646,260.00
Objective	

Expand the eBusiness Network to support all types of mobile devices and traffic volume related to increased usage. This supports the new mobile initiative to provide ease of access to key systems for employees as well as customers.

Project Dependency Diagram

Dependencies								eBusiness Mobile Network		
Project Name	Project ID	Task Name	Dependency Schedule	Start	Finish	Type	Dependency Type	Task Name	Start	Finish
Mobility Management Services	PR1032	Risk Response and Mitigation Plan		11/11/2013	12/16/2013	Predecessor	Finish-Start	Identify Infrastructure Requirements	12/17/2013	1/14/2014
Security Compliance	PR1031	Construction Phase Gate Complete ✓		11/18/2013	12/23/2013	Predecessor	Finish-Start	Requirements Definition	12/29/2013	1/21/2014
Mobile Commerce	PR1041	Functional and System Testing ✓		1/20/2014	2/7/2014	Successor	Start-Start	Functional and Technical Design ✓	1/22/2014	2/18/2014
Mobile Device Management (MDM) Deployment	PR1030	Define Resource Plan		3/5/2014	3/21/2014	Successor	Finish-Start	User Interface Development ✓	3/25/2014	4/25/2014
MyLearning Mobile Pilot	PR1044	Database Development ✓		3/17/2014	4/25/2014	Successor	Finish-Start	Unit and Performance Testing ✓	4/28/2014	7/18/2014

✓ = Critical

Report Prerequisites:

- The project must have at least one task or milestone with a dependency to a task or milestone in another project to display in the report.
- For the project summary section, the project must have budgeted or planned cost entered on the financial summary of the project. If the project has a detailed budget or cost plan, then the approved budget amount or cost plan amount for the plan of record will display based on the financial plan type parameter selected when running the report.

Report Definition:

Name:	Project Task Dependencies
ID:	CSP_PRJ_TaskDependencies
Description:	Project Task Dependencies (CSP)
Executable Name:	/CSP/Project Task Dependencies

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Task Start From param_start_date	Relative Date		No
Task Start To param_end_date	Relative Date		No
Show Grid Detail? param_show_grid	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Financial Plan Type: Budget, Planned

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Financial Plan Type parameter allows you to select which type of financial plan cost amount to display in the project summary section of the report. You may run the report to display the budgeted or planned cost amount entered on the financial summary of the project. If the project has a detailed

budget or cost plan, then the approved budget amount or cost plan amount for the plan of record displays. The Financial Plan Type parameter works as follows:

Budget	The report displays budgeted cost. The above screen capture was run with the option of planned. If it were run with the option of budget, then it would display the word budgeted where it displays the word planned in the project summary section of the report.
Planned	The report displays planned cost. The above screen capture displays planned cost in the project summary section because this is the parameter value selected when running the report.

- The Task Start From and Task Start To parameters determine the start date of the tasks that display in the report. If dates are entered, the report will include tasks with start dates within the range of dates entered in the parameters. This allows you to control which inter-project dependencies display in the report. The diagram displays a maximum of five predecessor and five successor inter-project dependencies, but you can leverage the date parameters to determine which appear if you have more than five dependencies.
- The Show Grid Detail parameter controls whether the dependencies displayed in the diagram also display in a table below the diagram. The diagram displays a maximum of five predecessor and five successor inter-project dependencies. The detailed table does not have this limit and shows all inter-project task dependencies. If the parameter is checked, a table showing the dependencies will display below the diagram for each project. If the parameter is not checked, the table will not display.

Report Fields and Calculations:

The report displays the project name, project ID, project type, project manager, work status, start date, finish date, planned or budgeted cost, and objective in the project summary section. The report has a financial plan type parameter, allowing you to select whether to display the planned or budgeted cost.

The report displays only projects with inter-project task dependency relationships (i.e., dependencies to tasks or milestones in other projects). The report includes a diagram as a visual representation of these inter-project dependencies. The diagram uses rectangles to represent the main project and its dependent projects. The main project is at the center of the diagram. The predecessor projects are located above the main project; the successor projects are located below the main project. The dependency relationships are represented by lines connecting dependent projects to the main project, with the arrows pointing to the successor projects. The diagram displays a maximum of five predecessor and five successor projects. If there are more than five inter-project dependencies, the diagram will display the first five projects in alphabetical order. The other dependencies will display as part of the grid when you check the Show Grid Detail parameter. The report also has Task Start From/To parameters to control which inter-project dependencies display in the report.

When the Show Grid Detail parameter is checked the report includes a table that displays information about each project dependency associated to the main project. The project dependency information is displayed in the first eight columns and includes: dependent project name, dependent project ID, dependent task name, dependency schedule stoplight, dependent task start date, dependent task finish date, type (Predecessor, Successor), and dependency type (Finish-Finish, Finish-Start, Start-Finish, Start-Start). The main project information is displayed in the last three columns and includes: task name, task start date, and task finish date. The main project's name displays above these columns. The report also displays a checkmark icon, to the right of task name, indicating that the task or dependent task is critical.

This report contains the following calculations:

Dependency Schedule The dependency schedule stoplight is the number of days the task or milestone is late and considers the following:

- Whether or not a baseline exists
- Task or milestone status

If a baseline exists, then days late is calculated as task or milestone finish date minus baseline finish date. A positive number indicates that the task or milestone is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the task or milestone finish date is the same as the baseline finish date, then the task or milestone is considered late if it is not completed and it was due before today's date. In this case, days late is calculated as today's date minus task or milestone finish date.

If there is no baseline, then days late is calculated if the task or milestone is not completed and it was due before today's date. In this case, days late is calculated as today's date minus task or milestone finish date.

Dependency Schedule stoplight color is determined as follows:

Green	On Schedule	<= 0
Red	Late	> 0

Dependency Diagram

The dependency diagram uses rectangles to represent the main project and its dependent projects. The main project is in the center of the diagram. The predecessor projects are located above the main project; the successor projects are located below the main project. The color of the rectangle for the dependent projects is determined by the dependency schedule stoplight of their tasks or milestones. If a dependent project has at least one task or milestone with a red dependency schedule stoplight, then the rectangle in the diagram is red for that dependent project.

The color of the rectangle for the main project is based on the project's schedule, which is the number of days the main project is late, and considers the following:

- Whether or not a baseline exists
- Project progress

If a baseline exists, then days late is calculated as project finish date minus baseline finish date. A positive number indicates that the project is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project finish date is the same as the baseline finish date, then the project is considered late if it is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

If there is no baseline, then days late is calculated if the project is not completed and it was due before today's date. In this case, the number of days late is calculated as today's date minus project finish date.

Schedule color is determined as follows:

Green	On Schedule	<= 0
Red	Late	> 0

Report Security and Technical Details:

Security is determined by project view rights.

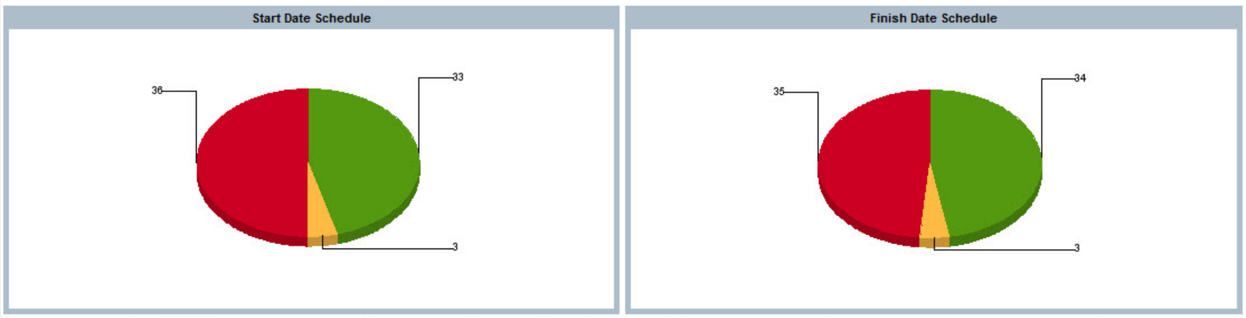
Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Key Task and Milestone Status

The Key Task and Milestone Status report displays the task or milestone status, percent complete and schedule percent indicators, by project. The report may also be grouped by project manager. There is an option, when running the report, to control the work breakdown structure (WBS) levels displayed in the report. The levels include: full WBS, key tasks and milestones, milestones only, or phases only. The start date schedule and finish date schedule pie charts display the number of tasks and milestones with each schedule percent indicator color.

Key Task and Milestone Status

Martin, Paul



Project / WBS	Type	Status	% Complete	Baselined?	Start Date	Start Days Late	Start Schedule %	Finish Date	Finish Days Late	Finish Schedule %
HR Claims Processing Enhancement										
Change Review Process	Phase	Started	90		6/3/2013	0		6/21/2013	18	
Test	Phase	Started	30		6/24/2013	0		7/5/2013	4	
Deployment	Phase	Not Started	0		7/8/2013	1		7/25/2013	0	
Mobile Security										
Plan Infrastructure Change	Phase	Not Started	0	✓	8/5/2013	0		8/16/2013	0	
Asset Mapping & Configuration	Phase	Not Started	0	✓	8/26/2013	0		9/13/2013	0	
Deployment	Phase	Not Started	0	✓	9/16/2013	0		9/20/2013	0	
Online Order Catalog										
Construction Phase Gate Complete	Milestone	Not Started	0	✓	7/4/2013	5		7/4/2013	5	
Deployment and Quality Phase	Phase	Not Started	0	✓	7/8/2013	3		7/12/2013	1	
Deployment Phase Gate Complete	Milestone	Not Started	0	✓	7/12/2013	1		7/12/2013	1	
Closing Phase	Phase	Not Started	0	✓	7/17/2013	5		7/17/2013	5	
Closing Phase Gate Complete	Milestone	Not Started	0	✓	7/17/2013	5		7/17/2013	5	
Social Networking Security Upgrade										
Initiation Phase	Phase	Not Started	0	✓	8/1/2013	0		8/1/2013	0	
Initiating Process Complete	Milestone	Not Started	0	✓	8/1/2013	0		8/1/2013	0	
Planning Phase	Phase	Not Started	0	✓	8/1/2013	0		8/20/2013	1	
Planning Phase Gate Complete	Milestone	Not Started	0	✓	8/20/2013	1		8/20/2013	1	

Report Prerequisite:
The project must have at least one task or milestone to display in the report.

Report Definition:

Name:	Key Task and Milestone Status
ID:	CSP_PRJ_KeyTaskMilestoneStatus
Description:	Key Task and Milestone Status (CSP)
Executable Name:	/CSP/Key Task and Milestone Status

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
WBS Type param_wbs	Pull-down Single-select	WBS Type RPT_WBSTYPE	Yes Key Tasks and Milestones
Show Late Tasks Only? param_late	Checkbox		No Unchecked
Include Completed Tasks? param_completed	Checkbox		No Unchecked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (Project Manager) CSP_RPT_PRJ_MGR_GROUP	Yes Project Manager
Show Graphs? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
WBS Type: Full WBS, Key Tasks and Milestones, Milestones Only, Phases Only
Group By: No Grouping, Project Manager

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.

- The report has a WBS Type parameter that allows you to control how much of the work breakdown structure you display in the report. The WBS Type parameter works as follows:

Full WBS	Summary tasks, detail tasks, and milestones display. Summary tasks are tasks that have at least one child task in the work breakdown structure. Detail tasks are tasks that do not have any child tasks. Milestones are WBS elements that have the milestone field checked and zero duration, the start and finish dates are the same.
Key Tasks and Milestones	Key tasks and milestones display. Summary tasks, detail tasks and milestones must have the key task field checked in order to display in the report.
Milestones Only	Milestones only display. Milestones are WBS elements that have the milestone field checked and zero duration, the start and finish dates are the same.
Phases Only	Summary tasks at the top level of the work breakdown structure display. Summary tasks are tasks which have at least one child task in the work breakdown structure.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group projects so you should select this value if you do not want to group the report.
Project Manager	This option groups the projects by project manager.

- The Show Late Tasks Only parameter allows you to control which tasks and milestones display in the report. If the parameter is checked, the report includes only tasks and milestones that are scheduled to finish late. The finish schedule percent indicator for these tasks and milestones is yellow or red.
- There is an Include Completed Tasks parameter that allows you to control which tasks and milestones display in the report. If the parameter is checked, the report includes tasks and milestones with all statuses, including 'Completed'. If the parameter is not checked, then it only includes tasks and milestones with a status of 'Not Started' and 'Started'.
- The Show Graphs parameter controls whether the start and finish date schedule charts display on the report. If the parameter is checked, when no grouping option is selected the charts will display on the first page of the report. If the parameter is checked and the report is grouped by project manager, the charts will display at the top of each project manager section in the report. If the parameter is not checked, the charts will not display.

Report Fields and Calculations:

The report displays the project name, task or milestone name, type (phase, task, milestone), task or milestone status, % complete, baselined (checkmark if the task or milestone has a baseline), start date, start days late, start schedule % indicator, finish date, finish days late, and finish schedule % indicator. When the show graphs parameter is checked, the report also includes two pie charts. The two pie charts show the start and finish date schedule percent indicator distribution, according to the group by option selected when running the report. The amounts in the charts are a summary of all tasks and milestones meeting the parameter criteria of the report.

This report contains the following calculations:

Start/Finish Days Late

Days late displays the number of days late considering the following:

- Whether or not a baseline exists
- Task or milestone status

If a baseline exists, then days late is calculated as task or milestone start/finish date minus baseline start/finish date. A positive number indicates that the task or milestone is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the task or milestone start/finish date is the same as the baseline start/finish date, then the task or milestone is considered late if it is not completed and it was due before today’s date. In this case, days late is calculated as today’s date minus task or milestone start/finish date.

If there is no baseline, then days late is calculated if the task or milestone is not completed and it was due before today’s date. In this case, days late is calculated as today’s date minus task or milestone start/finish date.

Start/Finish Schedule %

Displays a stoplight indicating days late as a percentage of the summary task or project timeframe, which is finish date minus start date. If the task or milestone has a parent task in the WBS, then the parent task timeframe is used in the calculation. If the task or milestone is at the top level of the WBS and does not have a parent task, then the project timeframe is used in the calculation.

The task or milestone calculation takes into account the task or milestone status and baseline (if a baseline exists). The color of the stoplight indicates if the task or milestone is on schedule or late.

Schedule % stoplight is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 % Late	> 0 and <= 10
Red	More Than 10 % Late	> 10

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
The tasks and milestones that display in the report are based on the WBS Type parameter as follows: **Full WBS**: All tasks and milestones display. **Key Tasks and Milestones**: Tasks and milestones with the key task field checked display. **Milestones Only**: WBS elements with the milestone field checked display. **Phase Only**: Summary tasks at the top level of the WBS display.	({?param_wbs} = 4880 OR ({?param_wbs} = 4877 AND odf_task_v2.prWBSLevel = 1 AND odf_task_v2.prIsTask = 0 AND odf_task_v2.prIsMilestone = 0) OR ({?param_wbs} = 4878 AND odf_task_v2.prIsMilestone = 1) OR ({?param_wbs} = 4879 AND odf_task_v2.prIsKey = 1))	The WBS Type parameter is based on the WBS Type lookup that includes the following values: Full WBS (ID=4880), Key Tasks and Milestones (ID=4879), Milestones Only (ID=4878), Phases Only (ID=4877).
Not Started and Started tasks and milestones only are included, unless the Include Completed Tasks parameter is checked.	({?param_completed} = 1 OR (t.prStatus <> 2 AND {?param_completed} = 0))	Completed tasks and milestones are excluded by default. Completed tasks and milestones are included if the Include Completed Tasks parameter is checked.

Project Earned Value

The Project Earned Value report displays the earned value information of a project by period and in total, allowing you to measure the project performance and progress. The report includes general project information, current performance values, indexes, and cost estimates. The charts include an S-Curve, comparing planned value, actual cost and earned value amounts by period; and an Indexes Curve, comparing target, CPI, and SPI values by period. There is also a report option to display the chart amounts by period in a table format.

Project Earned Value: eBusiness Network

Project Information

Project Manager	Martin, Paul	Start Date	1/1/2012
Project ID	PR1052	Finish Date	12/31/2012
Status	Approved	Baseline Start	1/1/2012
Progress	Started	Baseline Finish	12/31/2012

Current Performance

As Of Date	8/31/2012
Planned Value	85,500.00
Actual Cost	91,200.00
Earned Value	78,126.00

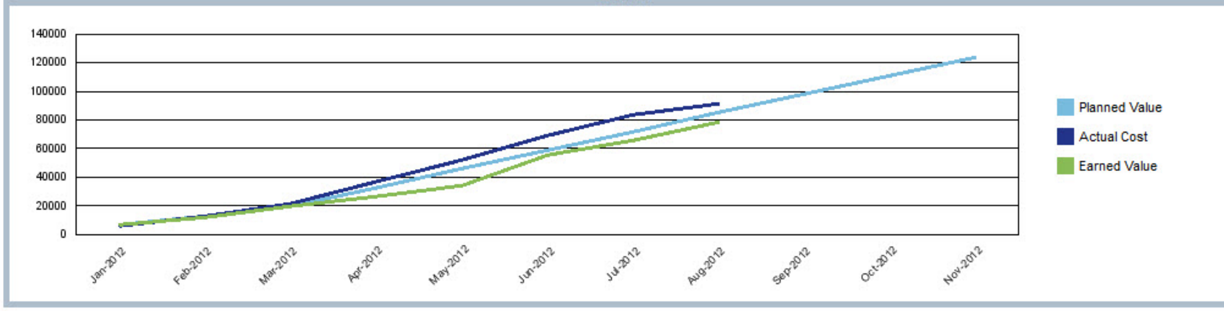
Indexes

CPI	0.86
SPI	0.91
CV	-13,074.00
SV	-7,374.00

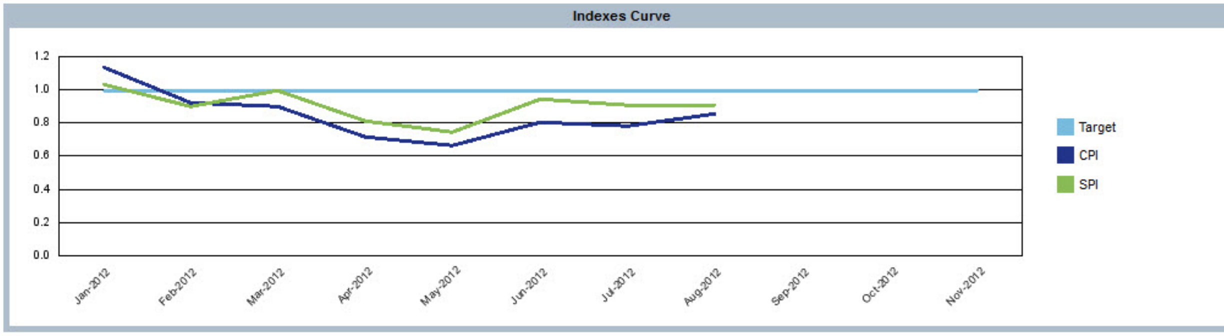
Cost Estimates

BAC	124,500.00
ETC	43,200.00
EAC	134,400.00
VAC	9,900.00

S-Curve



Indexes Curve



Report Page 1: Earned Value Curves

Project Earned Value: eBusiness Network

Period	Planned Value	Actual Cost	Earned Value	CV	SV	CPI	SPI	Target
Jan-2012	6,600.00	6,000.00	6,825.00	825.00	225.00	1.14	1.03	1.00
Feb-2012	12,900.00	12,600.00	11,700.00	-900.00	-1,200.00	0.93	0.91	1.00
Mar-2012	19,500.00	21,600.00	19,500.00	-2,100.00	0.00	0.90	1.00	1.00
Apr-2012	32,100.00	36,600.00	26,100.00	-10,500.00	-6,000.00	0.71	0.81	1.00
May-2012	45,900.00	51,600.00	34,020.00	-17,580.00	-11,880.00	0.66	0.74	1.00
Jun-2012	58,500.00	68,700.00	55,332.00	-13,368.00	-3,168.00	0.81	0.95	1.00
Jul-2012	71,700.00	83,700.00	65,550.00	-18,150.00	-6,150.00	0.78	0.91	1.00
Aug-2012	85,500.00	91,200.00	78,126.00	-13,074.00	-7,374.00	0.86	0.91	1.00
Sep-2012	97,500.00			0.00	-97,500.00			1.00
Oct-2012	111,300.00			0.00	-111,300.00			1.00
Nov-2012	124,500.00			0.00	-124,500.00			1.00

Report Page 2: Earned Value Detail Table

Report Prerequisites:

- There must be at least one earned value reporting period created (*Administration/Earned Value Management-Period Definitions*). The earned value reporting period must have a status of active. The report supports earned value reporting periods set up with a scale of weekly, monthly, quarterly, or annually. The periods displayed in the report depend on the earned value reporting period associated with the project.
- The project must have an earned value reporting period associated for the project to display in the report. It must also have an earned value calculation method selected for earned value to calculate for the project. Both of these fields are in the earned value section of the settings properties on the project. Clarity also has an earned value calculation method field on the task; it is not on the properties by default, so you must configure the properties and add it if you want to manage the calculation method differently for tasks versus the method defined on the project. If a task has a calculation method defined, then it is used to calculate earned value of the task. If the task does not have a calculation method defined, then the task will use the calculation method of a parent task. If a parent task does not have a calculation method defined, then the project's calculation method is used for all calculations. Note: The calculation methods are described in the below 'Report Fields and Calculations' section. Calculation of earned value always uses the current revision of the baseline.
- The project must have a baseline for the following to display or calculate: baseline start date, baseline finish date, planned value, earned value, CPI, SPI, CV, SV, BAC, and VAC.
- There must be a rate matrix created (*Administration/Finance-Manage Matrix*) and associated as a system default rate matrix (*Administration/Finance-Setup/Defaults/Project Transaction Entry Defaults*) or a project specific rate matrix for calculation of cost amounts.
- The project must have team members assigned to tasks with estimates to calculate metrics included in the report. It must also have assignments to post actuals to the project.
- The project must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate actual cost.
- If the earned value calculation method on the project is a percent complete method, then the project must have % complete entered on the tasks in the work breakdown structure. There is a % complete calculation field in the general section of the settings properties on the project. If this field is set to manual, then the % complete must be manually updated in the work breakdown structure. If this field is set to effort or duration, then the % complete is calculated by running the *Update % Complete* job. Note: The *Update % Complete* job is automatically run when running the *Update Earned Value History* or *Update Earned Value Total*s job so it is not necessary to run it separately if you are running one of these jobs, which are described in the next items.
- The project per period cost and index amounts in the line charts and table are dependent upon running the *Update Earned Value History* job. This job calculates earned value metrics for a project or group of projects, based on parameters selected, and creates earned value snapshots of the data by time period. This data is based on the earned value reporting period set on the project and earned value calculation method set on the project, or tasks. The *Update Earned Value History* invokes and also runs the *Update % Complete* job so it is not necessary to run this job separately. The *Update % Complete* job updates the % complete values whenever you change project or task data that affects the percent complete calculation. This job only updates the % complete values if the % Complete Calculation field is set to effort or duration. This is a field in the general section of the settings properties on the project.

- The project total cost amounts in the current performance, indexes and cost estimates report sections are dependent upon running the *Update Cost Totals* job or the *Update Earned Value Totals* job. The *Update Cost Totals* job is available in the Actions pull-down on the task list or baseline list. The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.

Report Definition:

Name:	Project Earned Value
ID:	CSP_PRJ_EarnedValue
Description:	Project Earned Value (CSP)
Executable Name:	/CSP/Project Earned Value

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Start Date param_start_date	Relative Date		No
End Date param_end_date	Relative Date		No
Show Period Earned Value Numbers? param_show_detail	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:

There are no parameter lookup values for this report.

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date and End Date parameters control which periods display in the charts and detail table. These parameters must be completed for data to display in the charts or detail table. The amounts in the current performance, indexes, and cost estimates sections of the report are project level amounts and do not change based on the date parameters selected.
- The Show Period Earned Value Numbers parameter controls whether the amounts by period displayed in the charts also display in a table below the charts. If the parameter is checked, a table showing earned value amounts by period will display below the charts for each project. If the parameter is not checked, the table will not display.

Report Fields and Calculations:

The report displays the project name, project manager, project ID, status, progress, start date, finish date, baseline start date, baseline finish date in the project information section. The current performance section includes: as of date and the system-calculated amounts of planned value, actual cost, and earned value. The indexes section includes: CPI, SPI, CV, and SV. The cost estimates section includes: BAC, ETC, EAC, and VAC. These amounts can be viewed in Clarity on the schedule & performance properties of the project.

The report includes two line charts used to visualize the trend in project performance over the reporting periods. The S-Curve chart displays planned value, actual cost, and earned value amounts over the earned value reporting periods. The Indexes Curve chart displays CPI and SPI, compared to the Target index, over the same earned value reporting periods.

When the Show Period Earned Value Numbers parameter is checked the report includes a table that displays the planned value, actual cost, earned value, CV, SV, CPI, SPI and target indexes for each earned value reporting period.

This report contains the following calculations:

Planned Value	This is the system-calculated value of budgeted cost of work scheduled (BCWS) or the budgeted amount you can spend on the project in a given time. It is the sum of the BAC through a point in time. This point in time is the project as of date set on the schedule & performance properties of the project. If there is no as of date, then the calculation uses the current date (i.e., today). This calculation requires a baseline.
Actual Cost	This is the system-calculated value of actual cost of worked performed (ACWP) and is based on posted actuals. It is the sum of the actuals on the project through a point in time. This point in time is the project as of date set on the schedule & performance properties of the project. If there is no as of date, then the calculation uses the current date (i.e., today). If you have future posted actuals, they will not be included in this calculation unless you set the as of date to a date that is the same as or after the last date of posted actuals.
Earned Value	This is the system-calculated value of budgeted cost of work performed (BCWP) and represents the amount of budgeted cost (BAC) completed based on performance. Performance is measured using the EV Calculation Method selected on the project. This calculation requires a baseline. The EV calculation method is set in the earned value section of the settings properties on the project. If you want to manage this at the task level, you can add the EV calculation method field to the task properties and select a

value on the task instead of using the value set on the project. The EV calculation methods are as follows:

Percent Complete:
This method is calculated by Clarity. At the project level, Earned Value is the sum of Earned Value for all level one tasks. At the task level, Earned Value = BAC * %Complete. Note: Percent Complete is the default method if you do not change it.

0/100:
This method is calculated by Clarity.
If % Complete = 100, then the Earned Value = BAC; else, Earned Value = 0.
The % complete field is on the schedule & performance project properties.

50/50:
This method is calculated by Clarity.
If %Complete = 100, then Earned Value = BAC.
If %Complete > 0 but < 100 then Earned Value = BAC / 2.
If %Complete = 0, then BCWP = 0.
The % complete field is on the schedule & performance project properties.

Level of Effort (LOE):
This method is calculated by Clarity. Earned Value = Planned Value.

Weighted Milestones:
This method is not calculated by Clarity. You must use the Earned Value (BCWP) Override field in the earned value section of the settings properties on the project to manually enter Earned Value. If you are managing the EV calculation method at the task level, you can also add the (BCWP) Override field to the task and enter it at the task level.

Milestone Percent Complete (PC):
This method is not calculated by Clarity. You must use the Earned Value (BCWP) Override field in the earned value section of the settings properties on the project to manually enter Earned Value. If you are managing the EV calculation method at the task level, you can also add the (BCWP) Override field to the task and enter it at the task level.

Apportioned Effort (AE):
This method is not calculated by Clarity. You must use the Earned Value (BCWP) Override field in the earned value section of the settings properties on the project to manually enter Earned Value. If you are managing the EV calculation method at the task level, you can also add the (BCWP) Override field to the task and enter it at the task level.

CPI

This is the system-calculated value of cost performance index (CPI) and is the ration of work performed to money spent. A value greater than or equal to one indicates a favorable condition at or under budget. A value of less than one indicates an unfavorable condition of over budget. This calculation requires a baseline.

Formula:
Earned Value / Actual Cost (or BCWP / ACWP)

SPI

This is the system-calculated value of schedule performance index (SPI) and is the ratio of work performed to work scheduled. A value greater than or equal to one indicates a favorable condition of work ahead of or on schedule. A value of less than one indicates an unfavorable condition of work behind schedule. This calculation requires a baseline.

	Formula: Earned Value / Planned Value (or BCWP / BCWS)
CV	This is the system-calculated value of cost variance (CV) and is the amount of what has been accomplished versus what has been spent. This calculation requires a baseline. **Formula:** Earned Value - Actual Cost (or BCWP - ACWP)
SV	This is the system-calculated value of schedule variance (SV) and is amount of work performed versus what is scheduled to date. This calculation requires a baseline. **Formula:** Earned Value - Planned Value (or BCWP - BCWS)
BAC	This is the system-calculated value of baseline at completion, which is the baseline cost at the time of the current baseline revision. It is the sum of all the assignment level actual cost values for the project and the ETC cost, at the time the baseline is recorded. It also includes future posted actual costs. This calculation requires a baseline.
ETC	This is the system-calculated value of the estimate cost to complete the project. ETC cost is the total of the remaining labor and non-labor cost to complete the project.
EAC	This is the system-calculated value of estimate at completion and is the cost of total effort. **Formula:** Actual Cost + ETC (or ACWP + ETC)
VAC	This is the difference between the estimate at completion (EAC) and the baseline at completion (BAC). This calculation requires a baseline. **Formula:** EAC – BAC

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	

Project Storyboard

The Project Storyboard report shows key aspects of a project organized in separate frames. Each frame in the report displays project information such as project dates, project objective, the amount and cost of resources planned and actual, key accomplishments, upcoming activities, current issues and risks, and the project progress towards goals. This report can be used to analyze the project earned value and track work performance to account for cost and schedule variances.

Project Storyboard: eCommerce Portal

Project Manager	Martin, Paul	**Status Report Date**	2/3/2012
Project Type	Major Project	**Status**	Approved
Stage	Building	**Progress**	Started

Project Dates

	Start	Finish
Plan	10/4/2011	10/8/2012
Baseline	10/4/2011	10/6/2012
Days Late	0	2

Status Report Indicators

- Overall
- Schedule
- Scope
- Cost and Effort

Labor Hours

Baseline	3,992.00
Actuals	664.00
Estimate To Complete	3,448.00
Estimate At Completion	4,112.00
EAC to Baseline Variance	120.00
Remaining Allocation	3,612.00
Allocation to ETC Variance	164.00

Financial Performance

Planned Benefit	750,000.00
Planned Cost	646,000.00
Actual Cost	106,600.00
Estimate At Completion	664,100.00
EAC to Planned Variance	18,100.00
Planned ROI	14.82
Planned Breakeven	7/31/2012

Project Objective

Development of a new portal for all Online Client Services

Key Accomplishments

Key Accomplishments for this week:

- Resource issues resolved
- User acceptance test plan approved

Status Report Update

There are some scope and schedule concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. Resource issues are all resolved and

Upcoming Activities

The following reviews are scheduled for next week:
- User acceptance test results
- Change Requests
- Monthly Project Review

Issues by Priority **Risks by Priority**

Current Issues More Issues...

Issue	Priority	Status	Target	Owner
Requirements are unclear		Open	2/23/2012	Morris, Tom
System architecture is non-compliant		Work in Progress	1/21/2012	Morris, Tom
Accept all possible popular pay methods		Open	2/15/2012	Hayes, Todd

Current Risks More Risks...

Risk	Probability	Impact	Priority	Status	Target	Owner
Resource Availability				Open	2/29/2012	Thompson, Peter
Sponsorship Risk				Open	2/3/2012	Granger, Paula

Earned Value Analysis by Phase Full Project Plan...

Phase	Start	Finish	Status	% Complete	Planned Value	Earned Value	Actual Cost	CV	SV	CPI	SPI
Planning Phase	10/4/2011	12/12/2011	Completed	100	77,200.00	77,200.00	77,200.00	0.00	0.00	1.00	1.00
Design Phase	12/12/2011	3/26/2012	Started	75	290,745.32	271,875.00	29,400.00	242,475.00	-18,870.32	9.25	0.94
Construction Phase	3/26/2012	7/19/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		
Deployment and Quality Phase	7/20/2012	9/22/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		
Closing Phase	9/24/2012	10/8/2012	Not Started	0	0.00	0.00	0.00	0.00	0.00		

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- The status report indicators, status report update, key accomplishments, and upcoming activities are based on the most recent project status report so at least one status report must be completed on the project for the indicators to calculate and the information to display. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- For the labor hours section, the project must have team members assigned to tasks with estimates.
- For the financial performance section, the project must have budget or planned cost and benefit amounts entered on the financial summary of the project. If the project has a detailed budget or cost plan, then the approved budget amount or cost plan amount for the plan of record will display based on the financial plan type parameter selected when running the report.

- The project must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate actual hours and actual cost.
- For the current issues and current risks sections, there must be issues and risks entered on the project. The report sorts issues and risks by priority, so the highest priority ones are displayed. Then, the report sorts them by their target resolution date in ascending order.
- The project must have a baseline for baseline start and finish dates, baseline labor hours, EAC to baseline variance, and earned value amounts to display data in the report.
- The earned value amounts are dependent upon running the *Update Cost Totals* or the *Update Earned Value Totals* jobs. The *Update Cost Totals* job is available in the Actions pull-down on the task list or baseline list. The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.

Report Definition:

Name:	Project Storyboard
ID:	CSP_PRJ_ProjectStoryboard
Description:	Project Storyboard (CSP)
Executable Name:	/CSP/Project Storyboard

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Phase Start Date param_date	Relative Date		No Start of Current Month
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Financial Plan Type: Budget, Planned

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Phase Start Date parameter allows you to control the project phases that display in the report. Phases beginning on or after the start date entered are displayed in the report.
- The Financial Plan Type parameter allows you to change the values displayed for the financial performance in the report. When you select financial plan type of budget, the report will display budgeted benefit, budgeted cost, EAC to budgeted variance, budgeted ROI, and budgeted breakeven. When you select financial plan type of planned, the report will display planned benefit, planned cost, EAC to planned variance, planned ROI and planned breakeven.

Budget	The report displays budget values for the financial performance.
Planned	The report displays planned values for the financial performance.

Report Fields and Calculations:
The report displays the project name, project manager, project type, stage, status report date, status, progress, start date, finish date, baseline start date, baseline finish date, days late, project objective, cost amounts and effort amounts. The effort amounts, in hours, include: baseline, actuals, ETC, EAC, EAC to baseline variance, remaining allocation, and allocation to ETC variance. The cost amounts include: planned benefit, planned cost, actual cost, EAC, EAC to planned variance, planned ROI and planned breakeven. Planned cost amounts can be switched to budgeted cost amounts by selecting the Budget option available in the Financial Plan Type report parameter.

The report displays the status report update, key accomplishments and upcoming activities from the latest project status report as well as the overall, schedule, scope, cost and effort indicators of the status report indicators. The status report indicators trending arrows show the results of the current status report compared to the results of the previous status report. If there is no previous status report or if there is no variance, the indicator will display a rightwards arrow.

The report also displays information about issues and risks. The issue and risk priority distribution is represented in two pie charts. The issue information includes: the issue subject, priority, status, target date and owner; the risk information includes: the risk subject, probability, impact, priority, status, target date and owner information. There are two links available. From the issue and risk lists it is possible to go to the project issues list page by clicking the “More Issues…” link and to the risks list page by clicking the “More Risks…” link.

The Earned Value Analysis by Phase frame lists earned value amounts by project phase including phase name, start, finish, status, % complete, and the system-calculated values of planned value, earned value, actual cost, CV, SV, CPI and SPI. This is consistent with how Clarity displays these amounts on the task properties. By default, phases beginning on or after the start date of the current month are listed. It can be modified by selecting a start date in the Phase Start Date report parameter. From this frame it is possible to go to the project plan by clicking the “Full Project Plan…”.
This report contains the following calculations:

Days Late

Days late displays the number of days late considering the following:

- Whether or not a baseline exists
- Project progress or task status

If a baseline exists, then days late is calculated as project or task finish date minus baseline finish date. A positive number indicates that the project or task is late according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the project or task finish date is the same as the baseline finish date, then the project or task is considered late if it is not completed and it was due before today’s date. In this case, days late is calculated as today’s date minus project or task finish date.

If there is no baseline, then days late is calculated if the project or task is not completed and it was due before today’s date. In this case, days late is calculated as today’s date minus project or task finish date. There is no calculation for resource assignments so the days late will not be populated.

Overall

This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report.

The stoplight color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

The trending arrow is determined as follows:

Upwards	Overall Status better than the previous Overall Status
Rightwards	No variance
Downwards	Overall Status worse than the previous Overall Status

Database view and column:

odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule

This is the schedule status field from the project status report. The schedule status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Schedule Status is better than the previous Schedule Status
Rightwards	No variance
Downwards	Schedule Status is worse than the previous Schedule Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_schedule_status

Scope

This is the scope status field from the project status report. The scope status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Scope Status is better than the previous Scope Status
Rightwards	No variance
Downwards	Scope Status is worse than the previous Scope Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_scope_status

Cost and Effort

This is the cost and effort status field from the project status report. The cost and effort status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Cost and Effort Status is better than the previous Cost and Effort Status
Rightwards	No variance
Downwards	Cost and Effort Status is worse than the previous Cost and Effort Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_cost_eft_status

Planned Value

This is the system-calculated value of budgeted cost of work scheduled (BCWS) or the budgeted amount you can spend on the project in a given time. It is the sum of the BAC through a point in time. This point in time is the project as of date set on the schedule & performance properties of the project. If there is no as of date, then the calculation uses the current date (i.e., today). This calculation requires a baseline.

Earned Value

This is the system-calculated value of budgeted cost of work performed (BCWP) and represents the amount of budgeted cost (BAC) completed based on performance. Performance is measured using the EV Calculation Method selected on the project. This calculation requires a baseline.

The EV calculation method is set in the earned value section of the settings properties on the project. If you want to manage this at the task level, you can add the EV calculation method field to the task properties and select a value on the task instead of using the value set on the project. The EV calculation methods are as follows:

Percent Complete:
This method is calculated by Clarity. At the project level, Earned Value is the sum of Earned Value for all level one tasks. At the task level, Earned Value = BAC * %Complete. Note: Percent Complete is the default method if you do not change it.

0/100:
This method is calculated by Clarity.
If % Complete = 100, then the Earned Value = BAC; else, Earned Value = 0.
The % complete field is on the schedule & performance project properties.

50/50:
This method is calculated by Clarity.
If %Complete = 100, then Earned Value = BAC.
If %Complete > 0 but < 100 then Earned Value = BAC / 2.
If %Complete = 0, then BCWP = 0.
The % complete field is on the schedule & performance project properties.

Level of Effort (LOE):
This method is calculated by Clarity. Earned Value = Planned Value.

Weighted Milestones:
This method is not calculated by Clarity. You must use the Earned Value (BCWP) Override field in the earned value section of the settings properties on the project to manually enter Earned Value. If you are managing the EV calculation method at the task level, you can also add the (BCWP) Override field to the task and enter it at the task level.

Milestone Percent Complete (PC):
This method is not calculated by Clarity. You must use the Earned Value (BCWP) Override field in the earned value section of the settings properties on the project to manually enter Earned Value. If you are managing the EV calculation method at the task level, you can also add the (BCWP) Override field to the task and enter it at the task level.

Apportioned Effort (AE):
This method is not calculated by Clarity. You must use the Earned Value (BCWP) Override field in the earned value section of the settings properties on the project to manually enter Earned Value. If you are managing the EV calculation method at the task level, you can also add the (BCWP) Override field to the task and enter it at the task level.

Actual Cost

This is the system-calculated value of actual cost of worked performed (ACWP) and is based on posted actuals. It is the sum of the actuals on the project through a point in time. This point in time is the project as of date set on the schedule & performance properties of the project. If there is no as of date, then the calculation uses the current date (i.e., today). If you have future posted actuals, they will not be included in this calculation unless you set the as of date to a date that is the same as or after the last date of posted actuals.

CV

This is the system-calculated value of cost variance (CV) and is the amount of what has been accomplished versus what has been spent. This calculation requires a baseline.

Formula:
Earned Value - Actual Cost (or BCWP - ACWP)

SV

This is the system-calculated value of schedule variance (SV) and is amount of work performed versus what is scheduled to date. This calculation requires a baseline.

Formula:
Earned Value - Planned Value (or BCWP - BCWS)

CPI

This is the system-calculated value of cost performance index (CPI) and is the ration of work performed to money spent. A value greater than or equal to one indicates a favorable condition at or under budget. A value of less than one indicates an unfavorable condition of over budget. This calculation requires a baseline.

Formula:
Earned Value / Actual Cost (or BCWP / ACWP)

SPI

This is the system-calculated value of schedule performance index (SPI) and is the ratio of work performed to work scheduled. A value greater than or equal to one indicates a favorable condition of work ahead of or on schedule. A value of less than one indicates an unfavorable condition of work behind schedule. This calculation requires a baseline.

Formula:
Earned Value / Planned Value (or BCWP / BCWS)

Report Security and Technical Details:
Security is determined by project view rights.

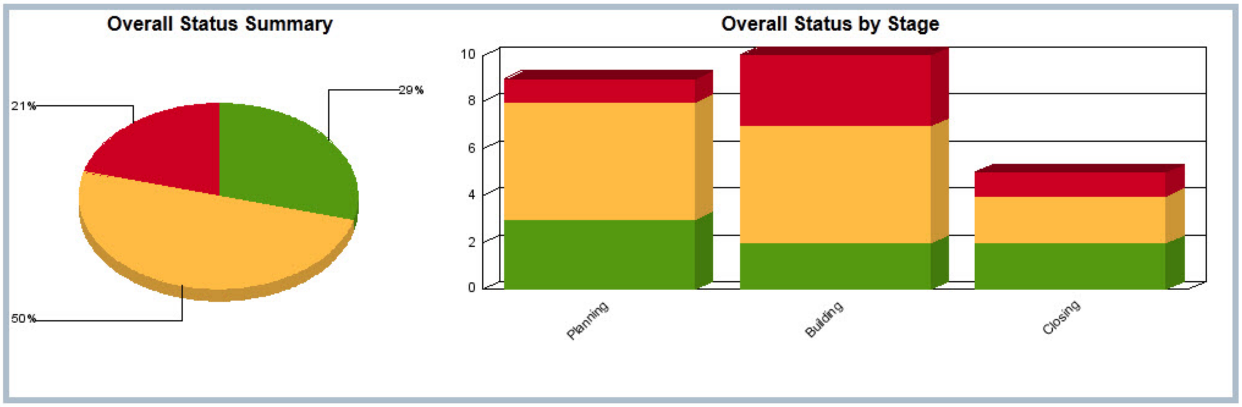
Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Phases are included.	odf_task_v2.prwbslevel = 1 AND odf_task_v2.pristask = 0	Tasks are excluded.

Topic	Database Statement	Additional Explanation
The earned value amounts are dependent upon running the *Update Cost Totals* job, which is available in the Actions pull-down on the task list or baseline list on a project. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu.	The cost amounts in the task ODF (Object Description Framework) view are updated when running the *Update Cost Totals* job or the *Update Earned Value Totals* job. The odf_task_v2 view is referenced in the query for earned value cost amounts.	The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.

Project Status Report List

The Project Status Report List report displays schedule dates, work status, and status report indicators across projects. The report may be grouped by several different options including: Portfolio Category, Overall Status, Project Type, Stage, Project Manager, Business Owner, and OBS Level. The columns that display in the report change based on the grouping option selected. The overall status summary pie chart displays the percentage of projects with each overall status color. The column chart displays the number of projects for each overall status color and is grouped by the option selected when running the report.

Project Status Report List



Project Name	Project Manager	Start	Finish	Work Status	Report Date	Status Reporting	Overall Status	Schedule	Scope	Cost and Effort
Planning										
Client Services Application	Thompson, Peter	1/1/2012	12/31/2012	Requested	8/31/2012	Required				
Global Order Processing	Tanner, Paul	1/1/2012	1/31/2013	Requested	8/31/2012	Required				
HR Claims Processing Enhancement	Sutherland, Joy	2/1/2012	9/29/2012	Requested	8/31/2012	Required				
Mobile Commerce	Reed, Henry	4/3/2012	1/18/2013	Requested	8/24/2012	Optional				
Mobile Security	Granger, Paula	9/1/2011	9/1/2013	Requested	8/24/2012	Optional				
Online Order Entry	Granger, Paula	1/2/2012	12/31/2012	Requested	8/24/2012	Optional				
Online Order Performance Improvements	Thompson, Peter	1/2/2012	3/30/2013	Requested	8/24/2012	Optional				
Online to Offline Market	Tanner, Paul	1/1/2012	1/12/2013	Requested	8/31/2012	Required				
Web Application Enhancement	Sutherland, Joy	1/2/2012	3/30/2013	Requested	8/31/2012	Required				
Building										
Credit Card Processing Enhancement	Martin, Paul	1/2/2012	2/16/2013	Active	8/31/2012	Required				
eCommerce Portal	Martin, Paul	10/4/2011	12/31/2012	Active	8/31/2012	Required				
ERP Integration	Thompson, Peter	6/5/2012	9/29/2012	Active	8/31/2012	Required				
Global Expense Application	Granger, Paula	1/2/2012	12/31/2012	Active	8/31/2012	Required				

Report Prerequisites:

- The project does not have any prerequisites to display in the report.
- The project properties must have fields such as project manager, work status, stage, and status reporting completed for them to display data in the report. The project name, start date, and finish date are required in Clarity so they will always display data.
- The status report date and the stoplight indicators are based on the most recent project status report so at least one status report must be completed on the project for these fields to display data. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent. The status report indicators will display gray stoplights if the project does not have a status report meeting these conditions.

Report Definition:

Name: Project Status Report List
ID: CSP_PRJ_StatusReportList
Description: Project Status Report List (CSP)
Executable Name: /CSP/Project Status Report List

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Portfolio Category 1 param_category1	Pull-down Single-select	Portfolio Category 1 OBJ_INVESTMENT_PFL_CATEGORY1	No
Portfolio Category 2 param_category2	Pull-down Single-select	Portfolio Category 2 OBJ_INVESTMENT_PFL_CATEGORY2	No
Portfolio Category 3 param_category3	Pull-down Single-select	Portfolio Category 3 OBJ_INVESTMENT_PFL_CATEGORY3	No
Portfolio Category 4 param_category4	Pull-down Single-select	Portfolio Category 4 OBJ_INVESTMENT_PFL_CATEGORY4	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Overall Status param_overall_status	Pull-down Multiple-select	Report (Red, Yellow, Green, Gray) CSP_RPT_CMN_COLOR_RYGG_ENUM	Yes Red, Yellow, Green, Gray
Status Reporting param_rpt_status	Pull-down Multiple-select	Status Reporting OBJ_PROJECT_STATUS_REPORTING	Yes Required
Include Programs? param_incl_program	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Group By param_group	Pull-down Single-select	Report (Categories, Project Type, Project Status, Work Status, Stage, Project Manager, Business Owner, OBS Level) CSP_RPT_CMN_CAT_OBS_MGR_GROUP	Yes No Grouping
Show Graph? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Overall Status: Red, Yellow, Green, Gray
Status Reporting: Not Required, Optional, Required
Group By: No Grouping, Portfolio Category 1-4, Overall Status, Project Type, Stage, Project Manager, Business Owner, OBS Level 1-10

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Portfolio Category 1-4 parameters are associated to the Portfolio Category 1-4 lookups in Clarity. These lookups are configurable so lookup values may be added, modified, or deactivated.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group the column chart or projects so you should select this value if you do not want to group the report.
Portfolio Category 1-4	This option groups the column chart and projects by portfolio category. The portfolio category fields are associated to lookups that do not include any values and should be configured to support your categorizations. The portfolio categories are configurable lookups so values may be added, modified, or deactivated.
Overall Status	This option groups the column chart and projects by the overall status color of the most recent status report.

Project Type	This option groups the column chart and projects by the project type. The values for project type are: Major Project, Application Change, and Infrastructure Deployment. The project type is a configurable lookup so values may be added, modified, or deactivated.
Stage	This option groups the column chart and projects by stage. The stage is a configurable lookup so values may be added, modified, or deactivated. You can find the stage lookup by filtering on Lookup Name = 'Investment Type' or Source = 'Static Dependent List' (*Administration/Data Administration-Lookups*).
Project Manager	This option groups the column chart and projects by project manager.
Business Owner	This option groups the column chart and projects by business owner.
OBS Level 1-10	This option groups the column chart and projects by OBS level and requires that you select a unit in the project OBS parameter in order to group by an OBS level. The project OBS parameter and grouping by an OBS level work in conjunction with one another. The project OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the projects attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the projects by this level (e.g., OBS Level 4). If projects are associated to units above level 4 (e.g., projects are attached to levels 2 and 3), then the projects associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the project the level by which you are grouping. If you group by an OBS level but you do not select a unit in the project OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the project OBS parameter to determine which OBS to use for grouping.

- The Include Programs parameter controls whether program status reports display. If the parameter is checked, the report will display program status reports. If the parameter is not checked, the program status reports will not display.
- The Show Graph parameter controls whether the Overall Status charts display on the report. If the parameter is checked, the charts will display at the top of the report. If the parameter is not checked, the charts will not display.

Report Fields and Calculations:
If the report is grouped by stage, then the report displays the following columns: project name, project manager, start date, finish date, work status, report date, status reporting, and status report indicators. If the report is grouped by project manager, then the report displays the following columns: project name, project manager, start date, finish date, work status, stage, report date, status reporting, and status report indicators. If the report is grouped by any other option, then the report displays the following columns: project name, project manager, start date, finish date, stage, report date, status reporting, and status report indicators. When the show graph parameter is checked, the report also includes a pie chart and a column chart. The overall status summary pie chart displays the percentage of projects, grouped by the overall status color of their most recent status report. The column chart displays the number of projects for each overall status color and is grouped by the option selected when running the report.

This report contains the following calculations from the most recent status report. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent status report.

Overall

This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report.

The stoplight color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90
Gray	No status report exists with a report status of final, or no value selected for report status	

Database view and column:
odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule

This is the schedule status field from the project status report. The schedule status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30
Gray	No status report exists with a report status of final, or no value selected for report status	

Database view and column:
odf_cop_prj_statusrpt_v2.cop_schedule_status

Scope

This is the scope status field from the project status report. The scope status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30
Gray	No status report exists with a report status of final, or no value selected for report status	

Database view and column:
odf_cop_prj_statusrpt_v2.cop_scope_status

Cost and Effort

This is the cost and effort status field from the project status report. The cost and effort status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30
Gray	No status report exists with a report status of final, or no value selected for report status	

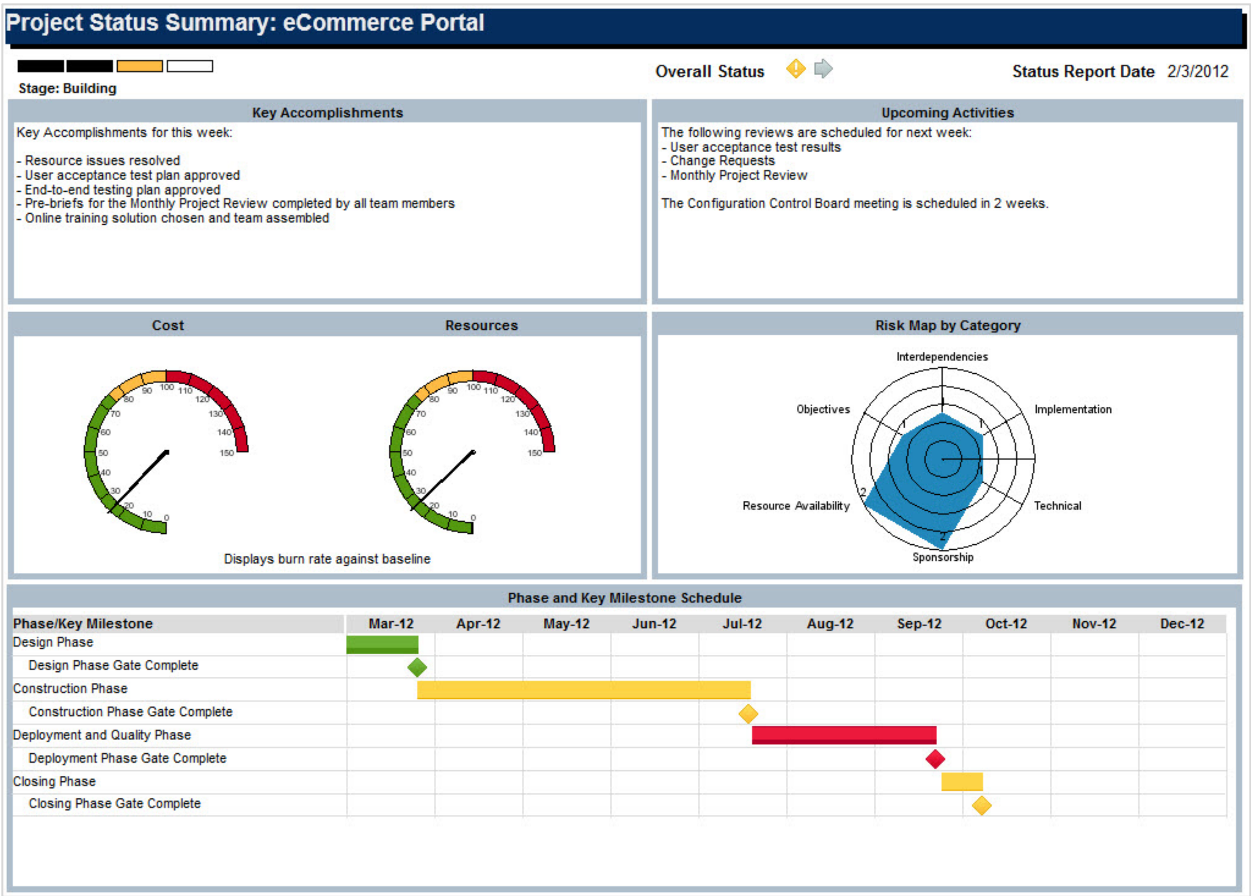
Database view and column:
odf_cop_prj_statusrpt_v2.cop_cost_eft_status

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Project Status Summary

The Project Status Summary report displays summary information about a project, including current stage, overall status, key accomplishments, upcoming activities, the cost and amount of resources consumed, mapped risks indicating categories with high number of risks, and a high level Gantt chart displaying information about the project phases and key milestones.



Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- The Overall Status, Status Report Date, Key Accomplishments and Upcoming Activities are based on the most recent project status report so at least one status report must be completed on the project for the indicators to calculate and the information in the frames be displayed. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The project must have a baseline for Cost and Resource to display data in the report.
- The baseline cost, for the cost gauge, is calculated based on the time slices with the name DAILYCURRENTBASEPROJCOST and MONTHLYCURRENTBASEPROJCOST (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the project period or the report will not display data. The daily slice is only used to calculate the baseline cost for the current month and the monthly slice is used to calculate baseline cost for prior months so they should be set up accordingly.

- The baseline resource assignment, for the resource gauge, is calculated based on the time slices with the name DAILYCURRENTBASEPROJUSAGE and MONTHLYCURRENTBASEPROJUSAGE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the project period or the report will not display data. The daily slice is only used to calculate the baseline assignment for the current month and the monthly slice is used to calculate the baseline assignment for prior months so they should be set up accordingly.

Report Definition:

Name:	Project Status Summary
ID:	CSP_PRJ_ProjectStatusSummary
Description:	Project Status Summary (CSP)
Executable Name:	/CSP/Project Status Summary

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Gantt Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month, Quarter, Year) CSP_RPT_CAL_PERIOD_TYPE	Yes Month
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Period Type: Week, Month, Quarter, Year

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Gantt Start Date parameter allows you to control the project phases and key milestones that display in the report. Phases and key milestones beginning on or after the start date entered are displayed in the report.
- The report has a Period Type parameter that allows you to change the display periods of the Gantt.

Week	The Gantt displays ten weeks. Each week starts on Monday.
Month	The Gantt displays ten months.
Quarter	The Gantt displays ten quarters.
Year	The Gantt displays ten years.

Report Fields and Calculations:

The report displays overall status, status report date, key accomplishments, and upcoming activities from the latest project status report. The trending arrow shows the current overall status compared to the overall status of a previous status report. If there is no previous status report or if there is no variance, the indicator will display a rightwards arrow.

The report includes two gauge showing cost and resource allocation burning rates against baseline. The cost amounts are calculated based on actual costs against baseline costs to date. The resource allocation amounts are calculated based on posted actuals against baseline efforts to date. The report also includes a radar chart displaying number of risks by risk category.

The report displays the work breakdown structure phase or milestone name, and a ten period Gantt schedule. The Gantt color is determined by the schedule %.

This report contains the following calculations:

Overall Status

This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report.

The stoplight color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

The trending arrow is determined as follows:

Upwards	Overall Status better than the previous Overall Status
Rightwards	No variance
Downwards	Overall Status worse than the previous Overall Status

Database view and column:

odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule %

Task calculation: Displays a stoplight indicating days late as a percentage of the summary task or project timeframe, which is finish date minus start date. If the task has a parent task in the WBS, then the parent task timeframe is used in the calculation. If the task is at the top level of the WBS and does not have a parent task, then the project timeframe is used in the calculation. The task calculation takes into account the task status and baseline (if a baseline exists). The color of the stoplight indicates if the task is on schedule or late.

Schedule % stoplight and Gantt bar color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 % Late	> 0 and <= 10
Red	More Than 10 % Late	> 10
Gray	Assignment level Gantt bar is gray	

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Phases and milestones are included.	((prtask.prwbslevel = 1 AND prtask.pristask = 0) OR (prtask.prismilestone = 1 AND prtask.priskey = 1))	Tasks are excluded.
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'DAILYCURRENTBASEPROJCOST' AND prj_blb_slicerequests.request_name = 'MONTHLYCURRENTBASEPROJCOST' AND prj_blb_slicerequests.request_name = 'DAILYCURRENTBASEPROJUSAGE' AND prj_blb_slicerequests.request_name = 'MONTHLYCURRENTBASEPROJUSAGE'	Time slices with the names of DAILYCURRENTBASEPROJCOST, MONTHLYCURRENTBASEPROJCOST, DAILYCURRENTBASEPROJUSAGE, and MONTHLYCURRENTBASEPROJUSAGE are required for this report.

Project Status Detail

The Project Status Detail report displays detailed information about the project team allocations, key milestones, risks, issues and change requests, including the most relevant project indicators.

Project Status Detail: eCommerce Portal

Project ID	PR1002	**Status Report Date**	2/3/2012
Project Manager	Martin, Paul	**Previous Report Date**	12/3/2011
Project Type	Major Project	**Status**	Approved
Goal	Cost Reduction	**Progress**	Started

Project Objective

Development of a new portal for all Online Client Services

Status Report Update

There are some scope and schedule concerns. The customer steering committee is making some new recommendations at the 11th hour. Some of these recommendations are excellent suggestions and worth reviewing. If we decide to implement some of these additional suggestions, that will alter the scope of this project and will require additional funding and executive support. Resource issues are all resolved and development is proceeding, but schedule is impacted. Before we make any commitments on delivery dates, we need to get the resource managers involved to check for availability of the key people needed to make this happen in a timely fashion.

Stage	Building
Finish Date	10/8/2012
Baseline Finish Date	10/6/2012
Days Late	2
	(Hours)
Baseline	3,992.00
Actuals	664.00
Estimate To Complete	3,448.00
Estimate At Completion	4,112.00
Projected Effort Variance	120.00
Projected Effort Variance %	

Status Report Indicators

- Overall
- Schedule
- Scope
- Cost and Effort

Project Indicators

- Schedule to Baseline
- Alignment
- Risk
- Issue
- Change

Project Team

Resource Name	Project Role	Start	Baseline Start	Finish	Baseline Finish	Booking Status	Request Status	Allocation Hours	Actual Hours	ETC Hours
Kelley, Art	Architect	10/4/2011	10/20/2011	10/8/2012	8/15/2012	Soft	New	572.00	60.00	250.00
Morris, Tom	Architect	10/4/2011	10/20/2011	10/8/2012	8/29/2012	Soft	New	360.00	140.00	360.00
Goldman, Mark	Business Analyst	10/4/2011	10/20/2011	10/8/2012	10/5/2012	Soft	New	708.00	140.00	364.00
Hill, Wayne	Developer	10/4/2011	12/12/2011	10/8/2012	8/29/2012	Soft	New	644.00	156.00	604.00
Patel, Sanjay	Developer	10/4/2011	1/16/2012	10/8/2012	7/17/2012	Soft	New	496.00	0.00	320.00
Stoneburg, Sam	Network Engineer	10/4/2011	11/14/2011	10/8/2012	8/22/2012	Soft	New	714.00	40.00	440.00
Martin, Paul	Project Manager	10/4/2011	10/4/2011	10/8/2012	10/5/2012	Soft	New	358.00	128.00	150.00
Storage Architect	Storage Architect	10/4/2011	10/4/2011	10/8/2012	8/22/2012	Soft	New	128.00	0.00	120.00
Turner, Bruce	Test Engineer	10/4/2011	1/16/2012	10/8/2012	8/15/2012	Soft	New	1,046.00	0.00	840.00

Key Milestones

Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule
Planning Phase Gate Complete	LM.001.100	Completed	12/12/2011	12/12/2011	0.00	
Design Phase Gate Complete	LM.002.100	Not Started	3/26/2012	3/26/2012	0.00	

Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule
Construction Phase Gate Complete	LM.003.100	Not Started	7/19/2012	7/17/2012	2.00	
Deployment Phase Gate Complete	LM.004.100	Not Started	9/22/2012	9/8/2012	14.00	
Closing Phase Gate Complete	LM.005.020	Not Started	10/8/2012	10/6/2012	2.00	

Risks

Name	ID	Description	Priority	Probability	Impact	Status	Response Type	Target Resolution
Sponsorship Risk	RS1014	Sponsors are difficult to engage for design and approval issues.	Medium	Low	Medium	Open	Watch	2/3/2012
Resource Availability	RS2000	There are limited resources who can complete this work. Any slippage impacts project finish date.	High	High	Medium	Open	Watch	2/29/2012

Issues

Name	ID	Description	Priority	Status	Target Resolution
Accept all possible popular pay methods	IS0006	System needs to accept all possible popular pay methods.	Medium	Open	2/15/2012
Integration with secure payment gateways for better payment processing	IS0005	Portal needs to Integrate with secure payment gateways for better payment processing.	Low	Open	2/19/2012
Requirements are unclear	IS1005	Customer has not defined requirements in enough detail to fully understand the scope.	High	Open	2/23/2012
Critical resource is unavailable	IS1007	Critical resource is unavailable for the initial design - this will cause estimating issues.	Low	Open	2/25/2012
System architecture is non-compliant	IS1006	Current funding and availability issues cause us to use a non-compliant architectural stack.	Medium	Work in Progress	3/24/2012

Change Requests

Name	ID	Description	Priority	Status	Expected Close
Additional Sales Analytics	CH1004	Add metrics for customer loan application demographics	Low	Open	3/17/2012

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- The status report indicators, status report update, key accomplishments and upcoming activities are based on the most recent project status report so at least one status report must be completed on the project for the indicators to calculate and the information in the frames be displayed. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The project must have a team, milestones, risks, issues and change requests for those report sections to display data. Milestones must have the key task field checked in order to display in the report.
- The project must have team members assigned to tasks with estimates to calculate labor hours.
- The project must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate actuals and actual cost.
- The project must have a baseline for baseline (hours or cost), projected effort variance, projected effort variance %, projected cost variance, and projected cost variance % to display data in the report.
- The project cost amounts are dependent upon running the *Update Cost Totals* job. This job is available in the Actions pull-down on the task list or baseline list. The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.

Report Definition:

Name:	Project Status Detail
ID:	CSP_PRJ_ProjectStatusDetail
Description:	Project Status Detail (CSP)
Executable Name:	/CSP/Project Status Detail

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Amount Type param_amt_type	Pull-down Single-select	Report (Cost, Hours) CSP_RPT_CMN_AMOUNT_TYPE	Yes Hours
Risk, Issue, and CR Priority param_priority	Pull-down Multiple-select	Risk/Issue Priority RIM_PRIORITY	Yes Low, Medium, and High
Risk, Issue, and CR Status param_rim_status	Pull-down Multiple-select	Risk/Issue Status RIM_STATUS	Yes Open, Work in Progress, and Resolved
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Amount Type: Cost, Hours
Risk, Issue, and CR Priority: Low, Medium, High
Risk, Issue, and CR Status: Open, Work in Progress, Resolved, Closed

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Amount Type parameter allows you to determine if the report displays amounts as cost or hours. When you select cost as the amount type, the report displays a section heading of (Cost) and displays the amounts as cost. When you select hours as the cost amount type, the report displays a section heading of (Hours) and displays amounts in hours.

  Cost The report displays a (Cost) heading and the baseline, actual, ETC, EAC, and projected variance amounts are represented as cost.

  Hours The report displays an (Hours) heading and the baseline, actual, ETC, EAC, and projected variance amounts are represented in hours.

Report Fields and Calculations:

The report displays the project name, project ID, project manager, project type, goal, status, progress, project objective, stage, finish date, baseline finish date, days late, cost or effort amounts, and project indicators. The project indicators include: schedule to baseline, alignment, risk, issue, and change.

If the amount type parameter is set to cost, then the report displays the following columns: baseline, actuals, ETC, EAC, projected cost variance, and projected cost variance %. If the amount type parameter is set to hours, then the report displays the following columns: baseline, actuals, ETC, EAC, projected effort variance, and projected effort variance %.

The report displays the status report date and status report update from the latest project status report as well as the following status report indicators: overall, schedule, scope, and cost and effort. The previous report date is from the prior project status report, based on report date. The status report indicator trending arrows compare the current status report to the prior status report. An upward pointing arrow indicates the status has improved, a downward pointing arrow indicates the status has gotten worse, and a right pointing arrow indicates that there no change in status or there is no prior status report for comparison.

The project team information displayed in the report includes: resource name, project role, start, baseline start, finish, baseline finish, booking status, request status, allocation hours, actual hours, and ETC hours.

The key milestones information displayed in the report includes: project milestone name, ID, status, finish, baseline finish, days late, and schedule.

The report also displays detailed information about risks, issues, and change requests. The risk information includes: risk name, ID, description, priority, probability, impact, status, response type, and target resolution. The issue information includes: issue name, ID, description, priority, status, and target resolution. The change request information includes: change request name, ID, description, priority, status, and expected close.

This report contains the following calculations:

Overall

This is the overall status field from the project status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report.

The stoplight color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

The trending arrow is determined as follows:

Upwards	Overall Status better than the previous Overall Status
Rightwards	No variance
Downwards	Overall Status worse than the previous Overall Status

Database view and column:

odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule	This is the schedule status field from the project status report. The schedule status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Schedule Status is better than the previous Schedule Status
Rightwards	No variance
Downwards	Schedule Status is worse than the previous Schedule Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_schedule_status

Scope	This is the scope status field from the project status report. The scope status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Scope Status is better than the previous Scope Status
Rightwards	No variance
Downwards	Scope Status is worse than the previous Scope Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_scope_status

Cost and Effort	This is the cost and effort status field from the project status report. The cost and effort status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Cost and Effort Status is better than the previous Cost and Effort Status
Rightwards	No variance
Downwards	Cost and Effort Status is worse than the previous Cost and Effort Status

Database view and column:
odf_cop_prj_statusrpt_v2.cop_cost_eft_status

Alignment	Displays a stoplight based on the project business alignment, which is the average of the scores for each factor selected on the business alignment project properties. A higher value indicates better alignment.

The stoplight color is determined as follows:

Red	Poor Alignment	< 34
Yellow	Average Alignment	>= 34 and < 67
Green	Good Alignment	>= 68

Database view and column:
odf_project_v2.obj_alignment

Risk	Displays a stoplight based on the project risk score, which is the combined risk level for the project based on all the selections made in the risk factors section of the risk rating project properties. A lower value indicates lower risk.

The stoplight color is determined as follows:

Green	Low Risk	< 34
Yellow	Medium Risk	>= 34 and < 68
Red	High Risk	>= 68

Database view and column:
odf_project_v2. risk

Issue

Displays a stoplight based on the highest project issue priority.

The stoplight color is determined as follows:

Green	All issues that exist on the project are low priority.
Yellow	At least one medium priority issue and no high priority issue exist on the project.
Red	At least one high priority issue exists on the project.

Database view and column:
cop_inv_rim_stoplights_v.issue_sl

Change

Displays a stoplight based on the highest project change request priority.

The stoplight color is determined as follows:

Green	All change requests that exist on the project are low priority.
Yellow	At least one medium priority change request and no high priority change request exist on the project.
Red	At least one high priority change request exists on the project.

Database view and column:
cop_inv_rim_stoplights_v.change_sl

Projected Cost Variance

The projected cost variance field is on the project and displays the variance between the EAC cost and baseline cost.

Formula:
((ETC Cost + Actual Cost (ACWP)) - BAC Cost)

Database view and column:
odf_project_v2. obj_cost_amt_var

Projected Cost Variance %

The projected cost variance % field is on the project and displays a stoplight indicating the projected cost variance as a percentage of BAC cost.

Projected Cost Variance % stoplight color is determined as follows:

Green	The EAC cost is less than or equal to the baseline.
Yellow	The EAC cost is between one and ten percent over baseline.
Red	The EAC cost is more than ten percent over baseline.
White	No baseline data exists.

Formula:
(((ETC Cost + Actual Cost (ACWP)) - BAC Cost) / BAC Cost) * 100

Database view and column:
odf_project_v2. obj_cost_pct_var

Projected Effort Variance	The projected effort variance field is on the project and displays the variance between the EAC effort and baseline effort. **Formula:** (EAC Effort – BAC Effort) **Database view and column:** odf_project_v2. obj_effort_amt_var
Projected Effort Variance %	The projected effort variance % field is on the project and displays a stoplight indicating the projected effort variance as a percentage of BAC effort. **Projected Effort Variance % stoplight color is determined as follows:** Green The EAC effort is less than or equal to the baseline. Yellow The EAC effort is between one and ten percent over baseline. Red The EAC effort is more than ten percent over baseline. White No baseline data exists. **Formula:** ((EAC Effort – BAC Effort) / BAC Effort) * 100 **Database view and column:** odf_project_v2. obj_effort_var
Days Late	Days late displays the number of days late considering the following: • Whether or not a baseline exists • Project progress or task status If a baseline exists, then days late is calculated as project or task finish date minus baseline finish date. A positive number indicates that the project or task is late according to the baseline. A negative number indicates that it is early according to the baseline. If a baseline exists and the project or task finish date is the same as the baseline finish date, then the project or task is considered late if it is not completed and it was due before today's date. In this case, days late is calculated as today's date minus project or task finish date. If there is no baseline, then days late is calculated if the project or task is not completed and it was due before today's date. In this case, days late is calculated as today's date minus project or task finish date. There is no calculation for resource assignments so the days late will not be populated. **Schedule stoplight color is determined as follows:** Green On Schedule <= 0 Yellow Between 1 and 10 Days Late > 0 and <= 10 Red More Than 10 Days Late > 10

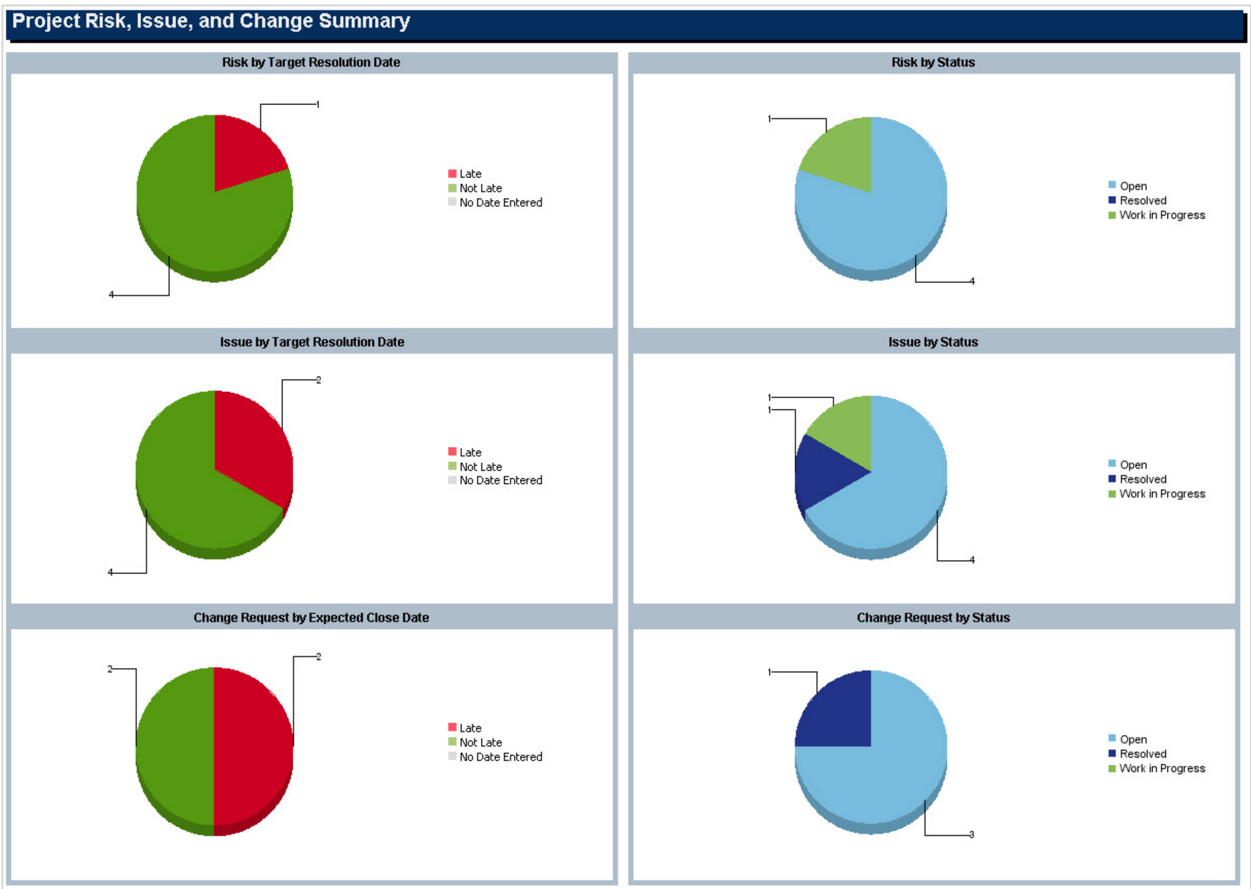
Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Labor roles are included.	srm_resources.resource_type = 0	Equipment, expense and material roles are excluded.

Topic	Database Statement	Additional Explanation
Milestones are included.	prtask.prismilestone = 1 AND prtask.priskey = 1	Tasks are excluded.
Project cost amounts are dependent upon running the *Update Cost Totals* job, which is available in the Actions pull-down on the task list or baseline list on a project. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu.	The cost amounts in the project ODF (Object Description Framework) view are updated when running the *Update Cost Totals* job or the *Update Earned Value Totals* job. The odf_project_v2 view is referenced in the query for cost amounts.	The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.

Project Risk, Issue, and Change Summary

The Project Risk, Issue, and Change Summary report includes two sets of pie charts. The first set displays the number of risk and issues by target resolution date and the number of change requests by expected close date. The second set displays the number of risks, issues and change requests by status. The report also includes a detail listing of risks, issues, and change requests with the following information: name, ID, priority, status, category, owner, created date, and target resolution or expected close date. The report detail may be grouped by project or not grouped.



Report Page 1: Project Risk, Issue, and Change Summary Charts

Project Risk, Issue, and Change Summary

Risks

Risk	Risk ID	Calculated Risk	Priority	Status	Category	Owner	Created Date	Target Resolution
CRM Enhancements (PR1029)								
Enhancements could affect integration points	RS1056	4		Work in Progress	Interdependencies	Turner, Bruce	7/3/2013	12/19/2013
New enhancements require additional licenses	RS1057	6		Open	Funding	Turner, Bruce	7/3/2013	10/30/2013
eCommerce Portal (PR1002)								
Sponsorship Risk	RS1014	4		Open	Sponsorship	Hayes, Todd	8/13/2013	8/26/2013
Online Order Performance Improvements (PR1006)								
Java vs .NET performance	RS1072	1		Open	Technical	Murphy, Carolyn	7/11/2013	8/8/2013
Can switching technology increase performance?	RS1030	1		Open	Technical	Murphy, Carolyn	7/8/2013	8/18/2013

Issues

Issue	Issue ID	Priority	Status	Category	Owner	Created Date	Target Resolution
CRM Enhancements (PR1029)							
Java scripts running on forms are causing performance issues	IS0001		Work in Progress	Technical	Turner, Bruce	7/3/2013	10/30/2013
The email router configuration manager cannot retrieve user information	IS0002		Resolved	Supportability	Turner, Bruce	7/3/2013	11/15/2013
eCommerce Portal (PR1002)							
Requirements are unclear	IS1005		Open	Sponsorship	Murphy, Carolyn	7/3/2013	12/27/2013
System Architecture is non-compliant	IS1006		Open	Technical	Murphy, Carolyn	7/3/2013	1/17/2014
Online Order Performance Improvements (PR1006)							
Database version upgrade	IS1041		Open	Technical	Murphy, Carolyn	7/3/2013	8/28/2013
Tests were done, but not matched hardware	IS1088		Open	Technical	Murphy, Carolyn	7/3/2013	9/15/2013

Change Requests

Change Request	Change Request ID	Priority	Status	Category	Owner	Created Date	Expected Close
eCommerce Portal (PR1002)							
Additional Resources	CH1015		Open	Resource Availability	McCarthy, John	12/10/2013	12/27/2013
Requirements are unclear - additional time needed	CH1017		Open	Sponsorship	Murphy, Carolyn	12/10/2013	12/31/2013
Additional Sales Analytics	CH1004		Open	Objectives	McCarthy, John	7/3/2013	10/15/2013
Online Order Performance Improvements (PR1006)							
Phase Extension Requested	CH1010		Resolved	Interdependencies	McCarthy, John	7/3/2013	11/4/2013

Report Page 2: Project Risk, Issue, and Change Summary Detail

Report Prerequisites:

- The project must have at least one risk in order for the project to display in the risk section of the report.
- The project must have at least one issue in order for the project to display in the issue section of the report.
- The project must have at least one change request in order for the project to display in the change request section of the report.
- Risks, issues and change requests must have the target resolution or expected close date completed for them to be classified as late or not late in the pie graphs. If these dates are not completed, they will be included in the 'No Date Entered' category.

Report Definition:

Name:	Project Risk, Issue, and Change Summary
ID:	CSP_PRJ_RiskIssueChangeSummary
Description:	Project Risk, Issue, and Change Summary (CSP)
Executable Name:	/CSP/Project Risk, Issue, and Change Summary

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_prj_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Risk, Issue, and CR Priority param_priority	Pull-down Multiple-select	Risk/Issue Priority RIM_PRIORITY	Yes Low, Medium, and High
Risk, Issue, and CR Status param_rim_status	Pull-down Multiple-select	Risk/Issue Status RIM_STATUS	Yes Open, Work in Progress, and Resolved
Show Risks? param_show_risks	Checkbox		No Checked
Show Issues? param_show_issues	Checkbox		No Checked
Show Change Requests? param_show_crs	Checkbox		No Checked
Include Programs? param_incl_program	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Sort By param_order	Pull-down Single-select	Report (ID, Created Date, Target Resolution Date) CSP_RPT_PRJ_RISK_ISSUE_SORT	Yes Created Date
Group By param_group	Pull-down Single-select	Report (Project) CSP_RPT_CMN_PROJECT_GROUP	Yes Project

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Risk, Issue, and CR Priority: Low, Medium, High
Risk, Issue, and CR Status: Open, Work in Progress, Resolved, Closed
Sort By: ID, Created Date, Target Resolution or Expected Close Date
Group By: No Grouping, Project

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The following parameters allow you to control whether the corresponding section displays in the report: Show Risks, Show Issues, and Show Change Requests.
- The report has an Include Programs parameter to include programs. If the parameter is checked, then program risks, issues, and change requests will be included in the report. If the parameter is not checked, then program risks, issues, and change requests are not included in the report.
- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

  ID This option sorts the report by the risk, issue or change request ID in ascending order.

  Created Date This option sorts the report by the create date in descending order.

  Target Resolution or Expected Close Date

  This option sorts the report by the target resolution or expected close date in ascending order.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

  No Grouping This option does not group risks, issues and change requests so you should select this value if you do not want to group the report.

  Project This option groups the risks, issues and change requests by the project.

Report Fields and Calculations:

The report has three parameters which determine the pie charts that display on the first page and the sections that display in the detail listing. If the show risks parameter is checked, the report displays two pie charts on the first page showing the risk distribution by target resolution date and status. The report also displays a listing of individual risks with the following information: project name, project ID, risk name, risk ID, calculated risk, priority stoplight, status, category, owner, created date, and target resolution date. If the report is grouped by project, then the project name and ID display as a group heading instead of columns.

If the show issues parameter is checked, the report displays two pie charts on the first page showing the issue distribution by target resolution date and status. The report also displays a listing of individual issues with the following information: project name, project ID, issue name, issue ID, priority stoplight, status, category, owner, created date, and target resolution date. If the report is grouped by project, then the project name and ID display as a group heading instead of columns.

If the show change requests parameter is checked, the report displays two pie charts on the first page showing the charge request distribution by expected close date and status. The report also displays a listing of individual change requests with the following information: project name, project ID, change request name, change request ID, priority stoplight, status, category, owner, created date, and expected close date. If the report is grouped by project, then the project name and ID display as a group heading instead of columns.

This report contains the following calculations:

Priority

The priority field is based on the priority of the risk, issue, or change request and includes the following values for rating priority: low, medium, and high.

The stoplight color is determined as follows:

Green	Low
Yellow	Medium
Red	High

Calculated Risk

Calculated risk is a score based on risk probability and impact, which have the following levels: low (1), medium (2), and high (3).

Formula:

Probability * Impact

Calculated risk background color is determined as follows:

Red	The calculated risk is greater than the system-level risk threshold.
White	The calculated risk is equal to or less than the system-level risk threshold.

The system-level risk threshold is defined in Clarity Administration (*Administration/Project Management-Risk Settings*).

Database view and column:

odf_risk_v2.calculated_risk
odf_risk_v2.is_above_threshold

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Project Risk Register

The Project Risk Register report displays comprehensive information for each project risk. The risk register also provides the option to display items associated to the risk such as notes, action items, tasks, and other risks and issues. The report may be grouped by project or not grouped.

Project Risk Register

Risk ID	Created Date	Risk Name	Target Resolution	Impact Date	Probability	Response Type	Category	Status
Owner		Description	Resolution		Impact	Calculated Risk	Priority	Originating ID
Online Order Performance Improvements								
RS1072	7/11/2013	Java vs. .NET performance	8/8/2013	8/22/2013	Low	Watch	Technical	Open
Murphy, Carolyn		If the purpose to switching technologies is to increase speed, have we done, or are there benchmarks we can read?			Low	1	Low	
RS1030	7/8/2013	Can switching technology increase performance?	8/18/2013	9/11/2013	Low	Watch	Technical	Open
Murphy, Carolyn		We are not 100% sure that switching the underlying technology can fix the performance problem.			Low	1	Low	
eCommerce Portal								
RS1014	8/13/2013	Sponsorship Risk	8/26/2013	8/30/2013	Medium	Watch	Sponsorship	Open
Hayes, Todd		Sponsors are difficult to engage for design and approval issues.			Medium	4	Medium	

Notes

Date Entered	Subject	Description	Entered By
8/19/2013	Sponsor Process Review	This risk has multiple associated actions. The team is unsure if the Sponsorship risk is due to incorrect Sponsorship lists, lack of visibility on the part of the Sponsors or the overall process. All will be reviewed to minimize this risk.	Morris, Tom

Associated Action Items

Due Date	Subject	Description	Assigned To	Status
8/14/2013	Project Sponsor List	Verify proper Sponsors are identified for each project	Martin, Paul Morris, Tom	In Progress Open
8/9/2013	Sponsor Notifications	Review the current processes for notifying the Sponsors of required actions. If process is in order, ensure the Sponsors are receiving the notifications.	Martin, Paul	Open

Associated Tasks

Task ID	Task Name	Start	Finish	% Complete	Status
LM.000.100	Initiating Process Complete	5/1/2013	5/1/2013	100	Completed
LM.002.010	Requirements Definition	7/9/2013	8/15/2013	50	Started
LM.002.020	Functional and Technical Design	8/19/2013	8/30/2013	0	Started

Report Prerequisites:

- The project must have at least one risk in order for the project to display in the report.
- The risk properties must have fields such as description, category, probability, impact, response type, resolution, target resolution, impact date, and originating ID completed for them to display data in the report. The risk name, risk ID, priority, status, and owner are required in Clarity so they will always display data.

Report Definition:

Name:	Project Risk Register
ID:	CSP_PRJ_RiskRegister
Description:	Project Risk Register (CSP)
Executable Name:	/CSP/Project Risk Register

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_prj_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Risk Priority param_priority	Pull-down Multiple-select	Risk/Issue Priority RIM_PRIORITY	Yes Low, Medium, and High
Risk Status param_rim_status	Pull-down Multiple-select	Risk/Issue Status RIM_STATUS	Yes Open, Work in Progress, and Resolved
Show Notes? param_show_notes	Checkbox		No Checked
Show Associated Action Items? param_show_items	Checkbox		No Checked
Shows Associated Tasks? param_show_tasks	Checkbox		No Checked
Show Associated Risks and Issues? param_show_risk	Checkbox		No Checked
Include Programs? param_incl_program	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Sort By param_order	Pull-down Single-select	Report (ID, Created Date, Target Resolution Date) CSP_RPT_PRJ_RISK_ISSUE_SORT	Yes Created Date
Group By param_group	Pull-down Single-select	Report (Project) CSP_RPT_CMN_PROJECT_GROUP	Yes Project

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Risk Priority: Low, Medium, High
Risk Status: Open, Work in Progress, Resolved, Closed
Sort By: ID, Created Date, Target Resolution Date
Group By: No Grouping, Project

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Show Notes parameter controls whether notes associated to risks are included in the report. If the parameter is checked, then notes will display at the bottom of each risk section in the report. If the parameter is not checked, notes will not display.
- The Show Associated Action Items parameter controls whether action items associated to risks are included in the report. If the parameter is checked, then action items will display at the bottom of each risk section in the report. If the parameter is not checked, action items will not display.
- The Show Associated Tasks parameter controls whether tasks associated to risks are included in the report. If the parameter is checked, then tasks will display at the bottom of each risk section in the report. If the parameter is not checked, tasks will not display.
- The Show Associated Risks and Issues parameter controls whether risks or issues associated to risks within the project are included in the report. If the parameter is checked, then risks or issues will display at the bottom of each risk section in the report. If the parameter is not checked, risks or issues will not display. Note: Risks and issues may be associated via the multi-select browse fields on the risk properties.
- The report has an Include Programs parameter to include programs. If the parameter is checked, then program risks will be included in the report. If the parameter is not checked, then program risks are not included in the report.
- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

ID	This option sorts the report by the risk ID in ascending order.
Created Date	This option sorts the report by the create date in descending order.
Target Resolution Date	This option sorts the report by the target resolution date in ascending order.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group risks so you should select this value if you do not want to group the report.
Project	This option groups the risks by the project.

Report Fields and Calculations:
The report displays the risk ID, created date, risk name, target resolution date, impact date, probability, response type, category, status, project name, owner, description, resolution, impact, calculated risk, priority, and originating ID. If the report is grouped by project, then the project name displays as a group heading instead of a column.

If the show notes parameter is checked, then the report displays the following columns for the risks that have notes: date entered, subject, description, and entered by. They are sorted by date entered, in descending order.

If the show associated action items parameter is checked, then the report displays the following columns for the risks that have action items associated to them: due date, subject, description, assigned to, and status. They are sorted by due date, in descending order.

If the show associated tasks parameter is checked, then the report displays the following columns for the risks that have tasks associated to them: task ID, task name, start, finish, % complete, and status. They are sorted by task ID, in ascending order. If there is no task ID, they are sorted by WBS sequence in ascending order.

If the show associated risks and issues parameter is checked, then the report displays the following columns for the risks that have other risks or issues associated to them: risk or issue ID, name, description, type (risk or issue), and status. They are sorted by risk or issue ID, in ascending order.

This report contains the following calculations:

Calculated Risk

Calculated risk is a score based on risk probability and impact, which have the following levels: low (1), medium (2), and high (3).

Formula:
Probability * Impact

Calculated risk background color is determined as follows:

Red	The calculated risk is greater than the system-level risk threshold.
White	The calculated risk is equal to or less than the system-level risk threshold.

The system-level risk threshold is defined in Clarity Administration (*Administration/Project Management-Risk Settings*).

Database view and column:
odf_risk_v2.calculated_risk
odf_risk_v2.is_above_threshold

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Project Issue Register

The Project Issue Register report displays comprehensive information for each project issue. The issue register also provides the option to display items associated to the issue such as notes, action items, and tasks. The report may be grouped by project or not grouped.

Project Issue Register

Issue ID	Created Date	Issue Name	Target Resolution	Impact Date	Category	Status
Owner		Description	Resolution		Priority	Originating ID
Online Order Performance Improvements						
IS1041	7/3/2013	Database version upgrade	8/28/2013	9/10/2013	Technical	Open
Murphy, Carolyn		To achieve the desired performance improvement results we need to upgrade the database to the current version.			High	
IS1088	8/2/2013	Tests were done, but not matched hardware	9/16/2013	9/23/2013	Technical	Open
Murphy, Carolyn		Benchmarking the performance increase must be done with a similar system to what we have in production to have any meaning.			Low	
eCommerce Portal						
IS1005	8/5/2013	Requirements are unclear	8/27/2013	9/6/2013	Sponsorship	Open
Murphy, Carolyn		Customer has not defined requirements in enough detail to fully understand the scope.			High	

Notes

Date Entered	Subject	Description	Entered By
8/10/2013	Gathering Customer Requirements	It appears that this issue might be specific to one Business Unit - the team is researching. Consider a process review that involves all Business Units.	Morris, Tom

Associated Action Items

Due Date	Subject	Description	Assigned To	Status
8/12/2013	Requirements Review Process	Verify that the proper requirements review process is being followed throughout all Business Units.	Goldman, Mark	Open

Associated Tasks

Task ID	Task Name	Start	Finish	% Complete	Status
LM.001.035	Identify Storage Requirements	7/29/2013	8/12/2013	50	Started
LM.001.040	Identify Infrastructure Requirements	8/12/2013	8/26/2013	30	Started

Issue ID	Created Date	Issue Name	Target Resolution	Impact Date	Category	Status
IS1006	9/2/2013	System Architecture is non-compliant	9/17/2014	9/30/2013	Technical	Open
Murphy, Carolyn		Current funding and availability issues cause us to use a non-compliant architectural stack.			High	

Notes

Date Entered	Subject	Description	Entered By
9/6/2013	Funding cycle	There might be a disconnect in the funding cycle process that results in this situation.	Martin, Paul

Associated Action Items

Due Date	Subject	Description	Assigned To	Status
9/13/2013	Review funding cycle with Executive team	Review the funding cycle with the Executive team to determine if a revision to the process can alleviate the issue. Based on the outcome, determine additional actions required.	Turner, Bruce	Open

Report Prerequisites:

- The project must have at least one issue in order for the project to display in the report.
- The issue properties must have fields such as description, category, resolution, target resolution, impact date, and originating ID completed for them to display data in the report. The issue name, issue ID, priority, status, and owner are required in Clarity so they will always display data.

Report Definition:

Name: Project Issue Register
ID: CSP_PRJ_IssueRegister
Description: Project Issue Register (CSP)
Executable Name: /CSP/Project Issue Register

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_prj_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Issue Priority param_priority	Pull-down Multiple-select	Risk/Issue Priority RIM_PRIORITY	Yes Low, Medium, and High
Issue Status param_rim_status	Pull-down Multiple-select	Risk/Issue Status RIM_STATUS	Yes Open, Work in Progress, and Resolved
Show Notes? param_show_notes	Checkbox		No Checked
Show Associated Action Items? param_show_items	Checkbox		No Checked
Show Associated Tasks? param_show_tasks	Checkbox		No Checked
Include Programs? param_incl_program	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Sort By param_order	Pull-down Single-select	Report (ID, Created Date, Target Resolution Date) CSP_RPT_PRJ_RISK_ISSUE_SORT	Yes Created Date
Group By param_group	Pull-down Single-select	Report (Project) CSP_RPT_CMN_PROJECT_GROUP	Yes Project

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Issue Priority: Low, Medium, High
Issue Status: Open, Work in Progress, Resolved, Closed
Sort By: ID, Created Date, Target Resolution Date
Group By: No Grouping, Project

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Show Notes parameter controls whether notes associated to issues are included in the report. If the parameter is checked, then notes will display at the bottom of each issue section in the report. If the parameter is not checked, notes will not display.
- The Show Associated Action Items parameter controls whether action items associated to issues are included in the report. If the parameter is checked, then action items will display at the bottom of each issue section in the report. If the parameter is not checked, action items will not display.
- The Show Associated Tasks parameter controls whether tasks associated to issues are included in the report. If the parameter is checked, then tasks will display at the bottom of each issue section in the report. If the parameter is not checked, tasks will not display.
- The report has an Include Programs parameter to include programs. If the parameter is checked, then program issues will be included in the report. If the parameter is not checked, then program issues are not included in the report.
- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

ID	This option sorts the report by the issue ID in ascending order.
Created Date	This option sorts the report by the create date in descending order.
Target Resolution Date	This option sorts the report by the target resolution date in ascending order.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group issues so you should select this value if you do not want to group the report.
Project	This option groups the issues by the project.

Report Fields and Calculations:

The report displays the issue ID, created date, issue name, target resolution date, impact date, category, status, project name, owner, description, resolution, priority, and originating ID. If the report is grouped by project, then the project name displays as a group heading instead of a column.

If the show notes parameter is checked, then the report displays the following columns for the issues that have notes: date entered, subject, description, and entered by. They are sorted by date entered, in descending order.

If the show associated action items parameter is checked, then the report displays the following columns for the issues that have action items associated to them: due date, subject, description, assigned to, and status. They are sorted by due date, in descending order.

If the show associated tasks parameter is checked, then the report displays the following columns for the issues that have tasks associated to them: task ID, task name, start, finish, % complete, and status. They are sorted by task ID, in ascending order. If there is no task ID, they are sorted by WBS sequence in ascending order.

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Project Change Request Register

The Project Change Request Register report displays comprehensive information for each project change request. The change request register also provides the option to display associated notes. The report may be grouped by project or not grouped.

Project Change Request Register

Change Request ID	Created Date	Change Request Name	Change in Cost	Change in Schedule	Change in Resources	Category	Status
Owner		**Description**	**Expected Close**	**Approved By**	**Approved Date**	**Priority**	**Originating ID**
Online Order Performance Improvements							
CH1010	8/2/2013	Phase Extension Requested	50,000.00	32	250	Interdependencies	Resolved
McCarthy, John		Extension needed for construction phase due to delay in equipment delivery.	9/30/2013	Thompson, Peter	8/29/2013	Medium	
	Notes						
	Date Entered	**Subject**	**Description**			**Entered By**	
	8/14/2013	Equipment delivery delay	This is the second delay by this vendor. Consider contacting other project leaders to determine if this is a systemic issue or only on this project.			Morris, Tom	
eCommerce Portal							
CH1015	9/16/2013	Additional Resources	20,000.00	3	2	Resource Availability	Open
McCarthy, John		Additional resources are needed for reporting requirements until we can get more Analytics reports.	10/31/2013			Medium	
	Notes						
	Date Entered	**Subject**	**Description**			**Entered By**	
	9/18/2013	Analytics	There appear to be many reporting and analytics requests. Discuss this at the next PMO meeting to determine if this is across all projects.			Martin, Paul	
CH1017	9/19/2013	Requirements are unclear - additional time needed		14		Sponsorship	Open
Murphy, Carolyn		Customer has not defined requirements in enough detail to fully understand the scope. Additional time is needed for requirements gathering.	10/31/2013			Low	IS1005
	Notes						
	Date Entered	**Subject**	**Description**			**Entered By**	
	9/20/2013	Requirements process review	PMO must discuss the Requirements gathering process - there is a gap in determining customer requirements.			Martin, Paul	
CH1004	9/23/2013	Additional Sales Analytics	10,000.00	10	4	Objectives	Open
McCarthy, John		Add metrics for customer loan application demographics	11/30/2013			Low	
	Notes						
	Date Entered	**Subject**	**Description**			**Entered By**	
	9/24/2013	Review all Analytics requests	The request for additional Analytics is appearing for multiple projects. Review all Analytics requests together to determine if there is one solution for all.			Morris, Tom	

Report Prerequisites:

- The project must have at least one change request in order for the project to display in the report.
- The change request properties must have fields such as description, change in cost, change in schedule, change in resources, category, expected close date, approved by, approved date, and originating ID completed for them to display data in the report. The change request name, change request ID, priority, status, and owner are required in Clarity so they will always display data.

Report Definition:

Name:	Project Change Request Register
ID:	CSP_PRJ_ChangeRequestRegister
Description:	Project Change Request Register (CSP)
Executable Name:	/CSP/Project Change Request Register

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Business Owner param_bus_owner	Browse Multiple-select	Project Stakeholder OBJ_PROJECT_STAKEHOLDER	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_prj_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Change Request Priority param_priority	Pull-down Multiple-select	Risk/Issue Priority RIM_PRIORITY	Yes Low, Medium, and High
Change Request Status param_rim_status	Pull-down Multiple-select	Risk/Issue Status RIM_STATUS	Yes Open, Work in Progress, and Resolved
Show Notes? param_show_notes	Checkbox		No Checked
Include Programs? param_incl_program	Checkbox		No Checked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Sort By param_order	Pull-down Single-select	Report (ID, Created Date, Target Resolution Date) CSP_RPT_PRJ_RISK_ISSUE_SORT	Yes Created Date
Group By param_group	Pull-down Single-select	Report (Project) CSP_RPT_CMN_PROJECT_GROUP	Yes Project
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Change Request Priority: Low, Medium, High

Change Request Status: Open, Work in Progress, Resolved, Closed
Sort By: ID, Created Date, Expected Close Date
Group By: No Grouping, Project

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Show Notes parameter controls whether notes associated to change requests are included in the report. If the parameter is checked, then notes will display at the bottom of each change request section in the report. If the parameter is not checked, notes will not display.
- The report has an Include Programs parameter to include programs. If the parameter is checked, then program change requests will be included in the report. If the parameter is not checked, then program change requests are not included in the report.
- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

ID	This option sorts the report by the change request ID in ascending order.
Created Date	This option sorts the report by the create date in descending order.
Expected Close Date	This option sorts the report by the expected close date in ascending order.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group change requests so you should select this value if you do not want to group the report.
Project	This option groups the change requests by the project.

Report Fields and Calculations:
The report displays the change request ID, created date, change request name, change in cost, change in schedule, change in resources, category, status, project name, owner, description, expected close date, approved by, approved date, priority, and originating ID. If the report is grouped by project, then the project name displays as a group heading instead of a column.

If the show notes parameter is checked, then the report displays the following columns for the change requests that have notes: date entered, subject, description, and entered by. They are sorted by date entered, in descending order.

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Unstaffed Allocations by Project Type

The Unstaffed Allocations by Project Type report displays unstaffed projects, grouped by project type. Unstaffed projects are projects that have roles allocated to them as place holders for future resource allocations. This report displays unstaffed allocations for six months starting with the current month. It also has totals by month and role for each project, with totals by month for each project type. The allocation amounts may be displayed as hours or FTEs.

Unstaffed Allocations by Project Type (Hours)

Project Name	Project Manager	Resource Role	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Total
Application Change									
Project Name	**Project Manager**	**Resource Role**	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**	**Total**
Global Order Processing	Granger, Paula	Architect	0.00	0.00	48.00	160.00	160.00	0.00	368.00
		Business Analyst	0.00	0.00	32.00	96.00	16.00	64.00	208.00
		Project Manager	0.00	0.00	80.00	0.00	0.00	32.00	112.00
		Total	**0.00**	**0.00**	**160.00**	**256.00**	**176.00**	**96.00**	**688.00**
		Application Change Total	**0.00**	**0.00**	**160.00**	**256.00**	**176.00**	**96.00**	**688.00**
Major Project									
Project Name	**Project Manager**	**Resource Role**	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**	**Total**
Online Customer Release	Sutherland, Joy	Architect	0.00	160.00	80.00	0.00	48.00	24.00	312.00
		Business Analyst	0.00	120.00	40.00	0.00	168.00	24.00	352.00
		Developer	0.00	0.00	184.00	136.00	48.00	24.00	392.00
		Network Engineer	0.00	40.00	40.00	152.00	56.00	24.00	312.00
		Project Manager	0.00	160.00	0.00	0.00	168.00	24.00	352.00
		Storage Architect	0.00	40.00	120.00	0.00	48.00	24.00	232.00
		Test Engineer	0.00	0.00	0.00	152.00	56.00	24.00	232.00
		Total	**0.00**	**520.00**	**464.00**	**440.00**	**592.00**	**168.00**	**2,184.00**
Online Order Improvements	Thompson, Peter	Architect	176.00	128.00	40.00	0.00	32.00	0.00	376.00
		Business Analyst	176.00	128.00	40.00	0.00	152.00	0.00	496.00
		Developer	176.00	8.00	184.00	136.00	32.00	0.00	536.00
		Network Engineer	176.00	48.00	40.00	152.00	40.00	0.00	456.00
		Project Manager	176.00	168.00	0.00	0.00	152.00	0.00	496.00
		Storage Architect	176.00	48.00	120.00	0.00	32.00	0.00	376.00
		Test Engineer	176.00	8.00	0.00	152.00	40.00	0.00	376.00
		Total	**1,232.00**	**536.00**	**424.00**	**440.00**	**480.00**	**0.00**	**3,112.00**
		Major Project Total	**1,232.00**	**1,056.00**	**888.00**	**880.00**	**1,072.00**	**168.00**	**5,296.00**
		Grand Total	**1,232.00**	**1,056.00**	**1,048.00**	**1,136.00**	**1,248.00**	**264.00**	**5,984.00**

Report Prerequisites:

- The project must have at least one role on the project team in order for the project to display in the report. Resource assignments are not required.
- The allocation amounts are calculated based on the time slice with the name MONTHLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The time periods that display in the report and the allocation amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name: Unstaffed Allocations by Project Type
ID: CSP_PRJ_UnstaffedAllocPrjType
Description: Unstaffed Allocations by Project Type (CSP)
Executable Name: /CSP/Unstaffed Allocations by Project Type

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:

Project Type: Major Project, Application Change, Infrastructure Deployment.
Project Status: All, Approved, Unapproved
Unit Type: FTE, Hours

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

Report Fields and Calculations:

The report displays the project name, project manager, role allocated to the project, and the allocation amounts by month and in total. Labor and equipment roles are included in the report; expense and material roles are excluded.

The report is grouped by project type, which is an attribute on the project. The lookup associated to the project type attribute is a configurable lookup in Clarity. This means that lookup values may be added, modified, or deactivated for the purposes of managing projects in Clarity and grouping them in this report.

Report Security and Technical Details:

Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Roles only are included.	srm_resources.person_type = 0	Resources are excluded.
Labor and equipment roles are included.	srm_resources.resource_type <= 1	Expense and material roles are excluded.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEALLOCCURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEAVAILCURVE'	Time slices with the names of MONTHLYRESOURCEALLOCCURVE and MONTHLYRESOURCEAVAILCURVE are required for this report.

Project Allocations by Employment Type

The Project Allocations by Employment Type report displays project allocations, grouped by employment type. This report displays allocations for six months starting with the current month. It has allocations by month and in total for each project and employment type. The allocation amounts may be displayed as hours or FTEs.

Project Allocations by Employment Type (Hours)

Project Name	Project ID	Project Manager	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Total
Contractor									
Client Services Application	PR1005	Thompson, Peter	352.00	336.00	368.00	336.00	352.00	368.00	2,112.00
eCommerce Portal	PR1002	Martin, Paul	204.00	0.00	0.00	0.00	0.00	86.00	290.00
Global Expense Application	PR1025	McCarthy, John	176.00	168.00	184.00	168.00	176.00	184.00	1,056.00
Global Order Processing	PR1034	Tanner, Paul	532.00	568.00	176.00	256.00	304.00	88.00	1,924.00
Online Order Catalog	PR1008	Martin, Paul	176.00	168.00	184.00	168.00	176.00	184.00	1,056.00
Online Order Entry	PR1007	McCarthy, John	190.00	136.00	274.00	258.00	266.00	234.00	1,358.00
Online Orders	PR1006	Thompson, Peter	160.00	48.00	248.00	206.00	240.00	216.00	1,118.00
Online System Enhancements	PR1038	Granger, Paula	238.00	792.00	612.00	722.00	760.00	918.00	4,042.00
Order Management	PR1010	Tanner, Paul	88.00	40.00	16.00	36.00	36.00	180.00	396.00
Web Application Enhancement	PR1004	Sutherland, Joy	128.00	248.00	304.00	56.00	72.00	38.00	846.00
Total			**2,244.00**	**2,504.00**	**2,366.00**	**2,206.00**	**2,382.00**	**2,496.00**	**14,198.00**
Employee									
Client Services Application	PR1005	Thompson, Peter	1,056.00	1,008.00	1,104.00	1,008.00	1,056.00	1,104.00	6,336.00
eCommerce Portal	PR1002	Martin, Paul	236.00	278.00	414.00	378.00	328.00	206.00	1,840.00
Global Expense Application	PR1025	McCarthy, John	440.00	420.00	460.00	420.00	440.00	460.00	2,640.00
Global Order Processing	PR1034	Tanner, Paul	380.00	400.00	440.00	336.00	352.00	216.00	2,124.00
Online Order Catalog	PR1008	Martin, Paul	1,056.00	1,008.00	1,104.00	1,008.00	1,056.00	1,104.00	6,336.00
Online Order Entry	PR1007	McCarthy, John	350.00	292.00	488.00	456.00	472.00	408.00	2,466.00
Online Orders	PR1006	Thompson, Peter	296.00	240.00	128.00	152.00	128.00	128.00	1,072.00
Online System Enhancements	PR1038	Granger, Paula	204.00	288.00	204.00	304.00	480.00	476.00	1,956.00
Web Application Enhancement	PR1004	Sutherland, Joy	360.00	40.00	184.00	272.00	144.00	76.00	1,076.00
Total			**4,378.00**	**3,974.00**	**4,526.00**	**4,334.00**	**4,456.00**	**4,178.00**	**25,846.00**
Grand Total			**6,622.00**	**6,478.00**	**6,892.00**	**6,540.00**	**6,838.00**	**6,674.00**	**40,044.00**

Report Prerequisites:

- The project must have at least one resource on the project team in order for the project to display in the report. Resource assignments are not required.
- The allocation amounts are calculated based on the time slice with the name MONTHLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The time periods that display in the report and the allocation amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Project Allocations by Employment Type
ID:	CSP_PRJ_AllocByEmpType
Description:	Project Allocations by Employment Type (CSP)
Executable Name:	/CSP/Project Allocations by Employment Type

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Project param_investment	Browse Multiple-select	Project browse SCH_BROWSE_PROJECT	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Unit Type: FTE, Hours

Parameter Explanations:

- The Project OBS parameter allows you to control which projects display in the report. When you select an OBS unit in this parameter, the report will display the projects attached to the OBS unit you select and the projects attached to any OBS units that are descendent units of the OBS unit you select.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

Report Fields and Calculations:
The report displays the project name, project ID, project manager, and allocation amounts by month and in total. Labor and equipment resources are included in the report; expense and material resources are excluded.

The report is grouped by employment type, which is an attribute on the resource. The lookup associated to the employment type attribute is a configurable system lookup in Clarity. This means that lookup values may be added or modified for the purposes of managing resources in Clarity and grouping them in this report.

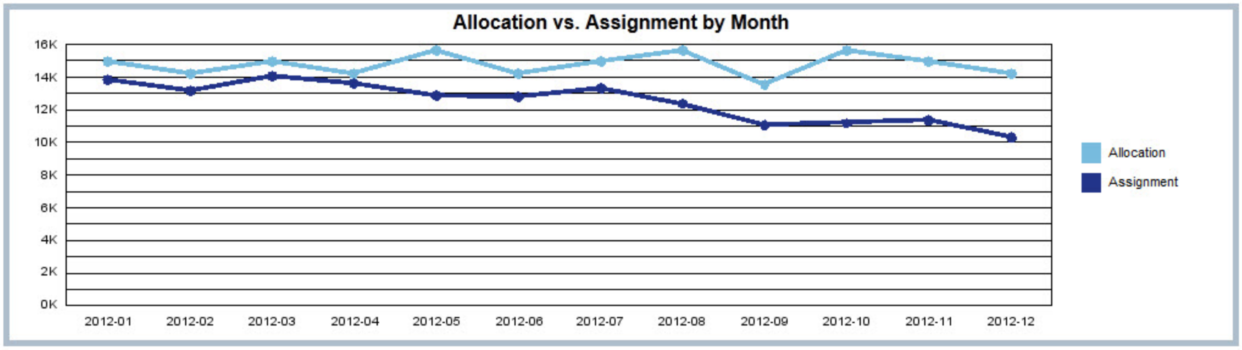
Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEALLOCCURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEAVAILCURVE'	Time slices with the names of MONTHLYRESOURCEALLOCCURVE and MONTHLYRESOURCEAVAILCURVE are required for this report.

Investment Allocations and Assignments

The Investment Allocations and Assignments report displays team member allocation, task assignment, and variance amounts by investment across time periods. The chart shows allocation versus assignment amounts by period. The report may also be run to show allocations only or assignments only. This report displays amounts by week or month, and in total, for each team member and investment. The amounts may be displayed as hours or FTEs.

Investment Allocations and Assignments



		Amounts by Month (Hours)												
Investment		Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Automated Security Enhancements														
Berry, Jason	Allocation	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Assignment	176.00	168.00	176.00	168.00	184.00	168.00	176.00	144.00	200.00	184.00	176.00	168.00	2,088.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	40.00	-40.00	0.00	0.00	0.00	0.00
Coleman, Joyce	Allocation	88.00	84.00	88.00	84.00	92.00	84.00	88.00	92.00	80.00	92.00	88.00	84.00	1,044.00
	Assignment	88.00	84.00	88.00	84.00	92.00	84.00	88.00	92.00	80.00	92.00	88.00	84.00	1,044.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gillian, Erin	Allocation	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Assignment	176.00	168.00	176.00	168.00	184.00	160.00	160.00	144.00	136.00	160.00	144.00	128.00	1,904.00
	Variance	0.00	0.00	0.00	0.00	0.00	8.00	16.00	40.00	24.00	24.00	32.00	40.00	184.00
Total	**Allocation**	**440.00**	**420.00**	**440.00**	**420.00**	**460.00**	**420.00**	**440.00**	**460.00**	**400.00**	**460.00**	**440.00**	**420.00**	**5,220.00**
	Assignment	**440.00**	**420.00**	**440.00**	**420.00**	**460.00**	**412.00**	**424.00**	**380.00**	**416.00**	**436.00**	**408.00**	**380.00**	**5,036.00**
	Variance	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**8.00**	**16.00**	**80.00**	**-16.00**	**24.00**	**32.00**	**40.00**	**184.00**
eBusiness Network														
Amos, Cheryl	Allocation	132.00	126.00	132.00	126.00	138.00	126.00	132.00	138.00	120.00	138.00	132.00	126.00	1,566.00
	Assignment	132.00	126.00	132.00	126.00	138.00	126.00	132.00	176.00	112.00	138.00	132.00	126.00	1,596.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-38.00	8.00	0.00	0.00	0.00	-30.00
Evans, Sean	Allocation	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Assignment	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Report Prerequisites:

- The investment must have at least one resource or role on the investment team in order for the investment and team member allocations to display in the report.
- The investment must have at least one resource or role assigned to a task in order for the investment assignments to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The allocation amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The assignment amounts are calculated based on the time slices with the name MONTHLYRESOURCEACTCURVE and WEEKLYRESOURCEACTCURVE; and MONTHLYRESOURCEESTCURVE and WEEKLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Investment Allocations and Assignments
ID:	CSP_INV_AllocationAssignment
Description:	Investment Allocations and Assignments (CSP)
Executable Name:	/CSP/Investment Allocations and Assignments

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Type of Hours param_hours_type	Pull-down Single-select	Report (Allocated and Assigned, Allocated, Assigned) CSP_RPT_RES_ALLOC_ASSIGN	Yes Allocated and Assigned
Include Unstaffed Roles? param_include_roles	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Show Graph? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Type of Hours: Allocated and Assigned, Allocated, Assigned

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display in the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report. The following options are available:

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- The Type of Hours parameter allows you to determine which amounts display in the report. The following options are available:

Allocated and Assigned	The report displays allocation, assignment, and variance amounts in the body of the report. It displays allocation and assignment amounts in the line chart.
Allocated	The report displays allocation amounts in the body of the report and the line chart.
Assigned	The report displays assignment amounts in the body of the report and the line chart.

- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report. If the parameter is checked, then roles will be included in the report. If the parameter is not checked, then roles are not included in the report.
- The Show Graph parameter controls whether the Allocation vs. Assignment by Period chart displays on the report. If the parameter is checked, the chart will display at the top of the report. If the parameter is not checked, the chart will not display.

Report Fields and Calculations:

The report displays the resource or role name with allocation, assignment, and variance amounts by period and in total, grouped by investment. The report also includes a line chart showing allocation versus assignments, in hours or FTEs, by month or week. Labor and equipment resources or roles are included in the report; expense and material resources or roles are excluded.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

This report contains the following calculation:

Variance

The variance field is the difference between the allocation and assignment amounts.

Variance background color is determined as follows:

Red — The assignment amount exceeds the allocation amount.

Formula:

Allocation - Assignment

Report Security and Technical Details:

Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Resources only are included, unless the Include Unstaffed Roles parameter is checked.	({?param_include_roles} = 1 OR ({?param_include_roles} = 0 AND r.person_type <> 0))	Roles are excluded by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources and roles are included.	srm_resources.resource_type <= 1	Expense and material resources and roles are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END (prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 5 ELSE 55557 END OR prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END)	MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEESTCURVE (ID=5), WEEKLYRESOURCEESTCURVE (ID=55557), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Investment Assignments by Task

The Investment Assignments by Task report displays actual and estimate effort amounts for resource task assignments, by investment. The report displays amounts by resource task assignment, and in total, for each investment. The report also displays task status and % complete information, as well as assignment start and finish dates.

Investment Assignments by Task

Task	Status	% Complete	Assignment						
			Resource	Role	Start	Finish	Actuals	ETC	EAC
Mobile Commerce									
Database Development	Not Started	0.00	Lewis, Dana	Developer	9/3/2012	9/28/2012	0.00	39.00	39.00
User Interface Development	Not Started	0.00	Lewis, Dana	Developer	9/3/2012	12/31/2012	0.00	269.00	269.00
Unit and Performance Testing	Not Started	0.00	Turner, Bruce	Test Engineer	12/31/2012	1/11/2013	0.00	80.00	80.00
Total							**0.00**	**388.00**	**388.00**
Online Order Catalog									
Database Development	Completed	100.00	Childers, Valerie	Architect	1/2/2012	1/6/2012	80.00	0.00	80.00
Database Development	Completed	100.00	Murphy, Carolyn	Developer	2/13/2012	2/17/2012	40.00	0.00	40.00
Data Conversion	Started	75.00	Lewis, Nicole	Test Engineer	1/2/2012	2/20/2012	200.00	30.00	230.00
Data Conversion	Started	75.00	Patel, Sanjay	Developer	1/2/2012	2/20/2012	120.00	40.00	160.00
Data Conversion	Started	75.00	Walker, Terry	Storage Architect	1/2/2012	2/20/2012	224.00	120.00	344.00
Functional and System Testing	Started	20.00	Roberts, Beth	Test Engineer	2/20/2012	3/2/2012	0.00	40.00	40.00
Functional and System Testing	Started	20.00	Stewart, Diane	Storage Architect	2/20/2012	3/2/2012	16.00	24.00	40.00
Total							**680.00**	**254.00**	**934.00**
Online Order Entry									
Identify Infrastructure Requirements	Started	50.00	McCarthy, John	Project Manager	1/2/2012	2/20/2012	160.00	20.00	180.00
Identify Infrastructure Requirements	Started	50.00	Parker, Ashley	Business Analyst	1/2/2012	2/20/2012	80.00	100.00	180.00
Identify Infrastructure Requirements	Started	50.00	Sampson, Mike	Test Engineer	1/3/2012	2/27/2012	64.00	116.00	180.00
Identify Infrastructure Requirements	Started	50.00	Stoneburg, Sam	Network Engineer	1/3/2012	2/20/2012	64.00	96.00	160.00
Functional and Technical Design	Started	25.00	McCarthy, John	Project Manager	2/13/2012	2/29/2012	0.00	80.00	80.00
Functional and Technical Design	Started	25.00	Parker, Ashley	Business Analyst	2/13/2012	2/17/2012	40.00	0.00	40.00
Functional and Technical Design	Started	25.00	Sampson, Mike	Test Engineer	2/13/2012	2/29/2012	0.00	40.00	40.00
User Interface Design	Started	10.00	McCarthy, John	Project Manager	2/13/2012	3/16/2012	40.00	150.00	190.00
User Interface Design	Started	10.00	Parker, Ashley	Business Analyst	2/13/2012	3/16/2012	0.00	200.00	200.00
User Interface Design	Started	10.00	Stoneburg, Sam	Network Engineer	3/1/2012	3/14/2012	0.00	40.00	40.00
Portal Development	Not Started	0.00	Childers, Valerie	Architect	4/9/2012	6/5/2012	0.00	320.00	320.00
Portal Development	Not Started	0.00	Murphy, Carolyn	Developer	4/9/2012	6/5/2012	0.00	320.00	320.00
Knowledge Transfer	Not Started	0.00	Childers, Valerie	Architect	6/6/2012	6/15/2012	0.00	40.00	40.00
Knowledge Transfer	Not Started	0.00	Parker, Ashley	Business Analyst	6/6/2012	6/15/2012	0.00	40.00	40.00
Online Training Development	Not Started	0.00	McCarthy, John	Project Manager	6/18/2012	7/6/2012	0.00	120.00	120.00
Online Training Development	Not Started	0.00	Parker, Ashley	Business Analyst	6/18/2012	7/6/2012	0.00	120.00	120.00
Total							**448.00**	**1,802.00**	**2,250.00**
Grand Total							**1,128.00**	**2,444.00**	**3,572.00**

Report Prerequisites:

- The investment must have at least one resource or role assigned to a task in order for the investment and task to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

Report Definition:

Name: Investment Assignments by Task
ID: CSP_INV_AssignmentsbyTask
Description: Investment Assignments by Task (CSP)
Executable Name: /CSP/Investment Assignments by Task

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Task Start Date param_date	Relative Date		No
Include Completed Tasks? param_closed_tasks	Checkbox		No Unchecked
Include Unstaffed Roles? param_include_roles	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Task Start Date parameter determines the start date of the tasks that display in the report. If a date is entered, the report will include tasks with date equals to or greater than the date entered. If no date is entered, the report will include all tasks.
- There is an Include Completed Tasks parameter that allows you to control which tasks display in the report. If the parameter is checked, the report includes tasks with all statuses, including 'Completed'. If the parameter is not checked, then it only includes tasks with a status of 'Not Started' and 'Started'.
- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report. If the parameter is checked, then roles will be included in the report. If the parameter is not checked, then roles are not included in the report.

Report Fields and Calculations:
The report displays the task name, status, % complete, resource or role name, assignment role, assignment start date, assignment finish date, actuals, ETC, and EAC amounts by task and in total for each investment. If the assignment role is blank, then the team role displays. If the team role is blank, then the resource’s primary role displays. Labor and equipment resources or roles are included in the report; expense and material resources or roles are excluded.

This report contains the following calculation:

EAC	The EAC field is the sum of the ETC and actual amounts. **Formula:** ETC + Actuals

Report Security and Technical Details:
Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
Not Started and Started tasks only are included, unless the Include Completed Tasks parameter is checked.	({?param_closed_tasks} = 1 OR ({?param_closed_tasks} = 0 AND t.prStatus <> 2))	Completed tasks are excluded by default. Completed tasks are included if the Include Completed Tasks parameter is checked.
Resources only are included, unless the Include Unstaffed Roles parameter is checked.	({?param_include_roles} = 1 OR ({?param_include_roles} = 0 AND r.person_type <> 0))	Roles are excluded by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources or roles are included.	srm_resources.resource_type <= 1	Expense and material resources or roles are excluded.

Investment Baseline vs. Plan by Task

The Investment Baseline vs. Plan by Task report displays baseline and plan amounts for resources and roles assigned to the investment. This report displays baseline, actual, ETC, EAC, and variance amounts for twelve months, starting with the month selected in the start date report parameter. It has amounts by month and in total for each investment and assignment. The amounts may be displayed as hours or FTEs.

Investment Baseline vs. Plan by Task (Hours)

Online Order Entry

Phase/Task/Resource		Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Planning Phase														
Identify Infrastructure Requirements														
Parker, Ashley	Baseline	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Actual	80.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	80.00
	ETC	100.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	100.00
	EAC	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Sampson, Mike	Baseline	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Actual	64.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	64.00
	ETC	0.00	116.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	116.00
	EAC	64.00	116.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Variance	-116.00	116.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Design Phase														
Functional and Technical Design														
Sampson, Mike	Baseline	32.00	148.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	ETC	0.00	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	EAC	0.00	180.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	180.00
	Variance	-32.00	32.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Construction Phase														
Database Development														
Sampson, Mike	Baseline	0.00	0.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
	Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	ETC	0.00	0.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
	EAC	0.00	0.00	190.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	190.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total	**Baseline**	**392.00**	**148.00**	**190.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**730.00**
	Actual	**144.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**144.00**
	ETC	**100.00**	**296.00**	**190.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**586.00**
	EAC	**244.00**	**296.00**	**190.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**730.00**
	Variance	**-148.00**	**148.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**

Report Prerequisites:

- The investment must have at least one resource or role assigned to a task in order for the investment to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The phase and task grouping in the report is dependent upon the report WBS index table, which is populated by running the *Update Business Objects Report Tables* job with the update WBS index option checked. This job must be run after the phases and tasks are defined for the project or the report will display a message that there are no results that match your criteria.
- The baseline amounts are calculated based on the current baseline revision and the time slice with the name MONTHLYRESOURCEBASECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The actual amounts are calculated based on the time slice with the name MONTHLYRESOURCEACTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The ETC amounts are calculated based on the time slice with the name MONTHLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Investment Baseline vs. Plan by Task
ID:	CSP_INV_BaseVsPlanByTask
Description:	Investment Baseline vs. Plan by Task (CSP)
Executable Name:	/CSP/Investment Baseline vs Plan by Task

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Start Date param_from_date	Relative Date		Yes Start of Current Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
New Page per Investment? param_new_page	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Unit Type: FTE, Hours

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date parameter allows you to control the months that display in the report. The start date entered determines the first month displayed in the report, with the other eleven months following sequentially after the first month.
- The New Page per Investment parameter starts each investment at the top of a new page in the report if it is checked. This allows you to control the report format so that each investment starts on a new page.

Report Fields and Calculations:
The report displays the phase name, task name, resource or role name, and the assignment amounts of baseline, actual, ETC, EAC, and variance by month and in total. The assignment amounts include labor resources or roles; equipment, expense and material resources or roles are excluded.

This report contains the following calculations:

EAC

The EAC field is the sum of the ETC and actual amounts.

Formula:
ETC + Actual

Variance

The variance field is the difference between the EAC and baseline amounts. If no baseline exists, the baseline amounts will be set to 0 and the variance will be calculated as if the baseline amounts are 0.

Variance background color is determined as follows:
Red The EAC amount exceeds the baseline amount.

Formula:
EAC - Baseline

Report Security and Technical Details:
Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
Phase to which the task belongs is determined by the report WBS table.	rpt_wbsindex.phase_id = prTask.prid	This table is populated by running the *Update Business Objects Report Tables* job with the update WBS index option checked.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEBASECURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEACTCURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEESTCURVE' AND prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEAVAILCURVE'	Time slices with the names of MONTHLYRESOURCEBASECURVE, MONTHLYRESOURCEACTCURVE, MONTHLYRESOURCEESTCURVE, and MONTHLYRESOURCEAVAILCURVE are required for this report.

Investment Time and Estimate Review

The Investment Time and Estimate Review report displays actual and estimate amounts for resources assignments, grouped by investment or resource. This report displays plan actuals, plan ETC, pending actuals, and pending ETC giving visibility into actuals and recommended changes in ETCs on tasks. It also shows hours worked by date for the time periods selected when running the report.

Investment Time and Estimate Review

CRM Contact Center Development

Task Name	Resource Name	Resource Manager	Assignments		Pending		Change in ETC	Timesheet Status	Date Worked	Hours Worked
			Actuals	ETC	Actuals	ETC				
Functional and System Testing	Granger, Paula	Miller, Rosie	168.00	72.00	0.00	0.00	0.00	Posted	12/12/2011	8.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
	Johnson, Eric	Kumar, Arun	168.00	72.00	0.00	0.00	0.00	Posted	12/12/2011	8.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
	Walker, Terry	Miller, Rosie	168.00	72.00	0.00	0.00	0.00	Posted	12/12/2011	8.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
		Total	**504.00**	**216.00**	**0.00**	**0.00**	**0.00**			**120.00**

eCommerce Portal

Task Name	Resource Name	Resource Manager	Assignments		Pending		Change in ETC	Timesheet Status	Date Worked	Hours Worked
			Actuals	ETC	Actuals	ETC				
Functional Design	Goldman, Mark	Kumar, Arun	80.00	0.00	0.00	0.00	0.00	Posted	12/12/2011	4.00
User Interface	Hill, Wayne	Miller, Rosie	156.00	334.00	0.00	0.00	0.00	Posted	12/12/2011	4.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
	Morris, Tom	Miller, Rosie	40.00	320.00	40.00	296.00	16.00	Posted	12/12/2011	4.00
								Posted	12/13/2011	8.00
								Posted	12/14/2011	8.00
								Posted	12/15/2011	8.00
								Posted	12/16/2011	8.00
		Total	**276.00**	**654.00**	**40.00**	**296.00**	**16.00**			**76.00**
		Grand Total	**780.00**	**870.00**	**40.00**	**296.00**	**16.00**			**196.00**

Report Prerequisites:

- There must be at least one timesheet for the time period and timesheet status selected when running the report or the report will display a message that there are no results that match your criteria.
- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment and for it to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

  In a timesheet, resources may also assign themselves to tasks if they are a team member on the project and the 'Prevent Unassigned Timesheet Tasks' field is unchecked on the project. This field is in the time and staff section of the settings properties on the project. They may also create unplanned tasks in a timesheet if they are a team member on the project and have the appropriate permissions (Project – Edit Project Plan).

- The hours worked amounts are calculated based on the time slice with the name DAILYRESOURCETIMECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the dates worked displayed in this report or the report will not display data for those dates.

Report Definition:

Name:	Investment Time and Estimate Review
ID:	CSP_INV_TimeAndEstimate
Description:	Investment Time and Estimate Review (CSP)
Executable Name:	/CSP/Investment Time and Estimate Review

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Time Period param_from_period	Browse Multiple-select	Report (Time Periods) CSP_RPT_TME_PERIOD	Yes
Timesheet Status param_status	Pull-down Multiple-select	Timesheet Status TIMESHEET_STATUS	Yes Open, Submitted, Returned, Approved, and Posted
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Group By param_group	Pull-down Single-select	Report (Investments, Resources) CSP_RPT_CMN_INV_RES_GROUP	Yes Investments
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Time Period: Current Time Period, Next Time Period, Previous Time Period, List of Time Periods
Timesheet Status: Open, Submitted, Returned, Approved, Posted, Adjusted
Group By: Investments, Resources

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Time Period parameter allows you to determine which dates worked display on the report. You must select at least one time period when running the report.
- The Timesheet Status parameter works in conjunction with the time period parameter. The report will only display the dates worked for the time period and timesheet status you select when running the report. One of the values in the timesheet status parameter is 'Adjusted' and this status requires some additional explanation. An adjusted timesheet is a timesheet which has been posted in Clarity but then changes are made to the timesheet and it is re-posted. As a general rule, it doesn't make sense to display adjusted timesheets in reports because these timesheets have been replaced with more recently posted timesheets. While the status of 'Adjusted' is available as an option to allow visibility into adjusted timesheets, it should not normally be selected when running the report.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

Investments	This option groups the report by investment and displays the following columns as the first three columns in the report: task name, resource name and resource manager.
Resources	This option groups the report by resource and displays the following columns as the first two columns in the report: investment name and task name.

Report Fields and Calculations:
If the report is grouped investment, then the report displays the following columns: task name, resource name, resource manager, actuals, ETC, pending actuals, pending ETC, change in ETC, timesheet status, date worked, and hours worked. If the report is grouped resource, then the report displays the following columns: investment name, task name, actuals, ETC, pending actuals, pending ETC, change in ETC, timesheet status, date worked, and hours worked. The amounts are displayed in hours and include labor resources only.

The assignment actuals are the actuals to date posted to the task. The assignment ETC is the current plan ETC for the task. The pending actuals are the total actuals entered in timesheets that are not posted to the project. The pending ETC is the pending ETC entered via a timesheet or on the task. The timesheet status, date worked, and hours worked columns display based on the time period and timesheet status parameters selected when running the report. This gives you visibility into daily time records for the time periods and status you choose.

This report contains the following calculations:

Change in ETC

The change in ETC field is the variance between the pending ETC and current plan ETC, less pending actuals.

Formula:
(Pending ETC - (Assignment ETC – Pending Actuals))

Variance background color is as follows:

Green — The recommended Change in ETC is negative, indicating the ETC should be decreased for the task.

Red — The recommended Change in ETC is positive, indicating the ETC should be increased for the task.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
A time slice is required for this report.	prj_blb_slicerequests.request_name = 'DAILYRESOURCETIMECURVE'	A time slice with the name of DAILYRESOURCETIMECURVE is required for this report.

Chapter 3: Resource Management

This section contains the following topic:

Crystal Reports

The resource management reports provide visibility into the capacity and demand of resources across the resource pool of your organization. The reports display capacity and demand by OBS, role, resource, and investment for summary and detail level analysis. They provide the ability to identify over allocated and under allocated resources, as well as overall resource availability. They also present a view of resource plan amounts across investments, compared to baseline amounts for those investments.

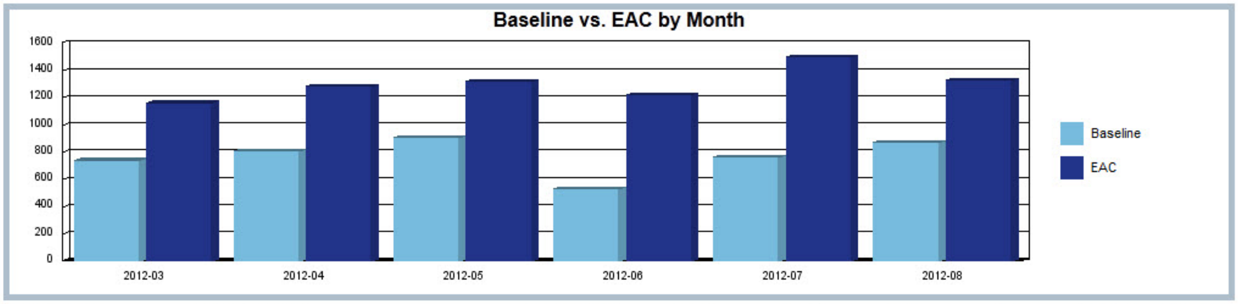
The reports include:

Resource Baseline vs. Plan by Employment Type

The Resource Baseline vs. Plan by Employment Type report displays baseline, actual, estimate, and variance amounts by resource across investments. The report is grouped by employment type (e.g., employee, contractor) to give you visibility into the variances for each type. The chart shows baseline versus estimate at completion by month. The amounts may be displayed as hours or FTEs.

Resource Baseline vs. Plan by Employment Type (Hours)

Contractor



Resource Name	Investment Name	Investment ID	Baseline	Actual	ETC	EAC	Variance	% Variance
Evans, Sean	Online System Enhancements	PR1038	320.00	0.00	320.00	320.00	0.00	0.00
Evans, Sean	Web Application Enhancement	PR1004	160.00	0.00	160.00	160.00	0.00	0.00
Goldman, Mark	Online System Enhancements	PR1038	320.00	0.00	320.00	320.00	0.00	0.00
Goldman, Mark	PCI Controls Remediation	PR1003	120.00	0.00	120.00	120.00	0.00	0.00
Goldman, Mark	eCommerce Portal	PR1002	56.00	0.00	153.60	153.60	97.60	174.29
Guptka, Rakesh	Online System Enhancements	PR1038	160.00	0.00	160.00	160.00	0.00	0.00
Guptka, Rakesh	Web Application Enhancement	PR1004	160.00	0.00	160.00	160.00	0.00	0.00
Kelley, Art	Client Services Application	PR1005	32.00	0.00	32.00	32.00	0.00	0.00
Kelley, Art	Online System Enhancements	PR1038	560.00	0.00	560.00	560.00	0.00	0.00
Kelley, Art	eCommerce Portal	PR1002	46.00	0.00	118.00	118.00	72.00	156.52
Khan, Sanjay	Online System Enhancements	PR1038	160.00	0.00	160.00	160.00	0.00	0.00
Krishna, Sai	Global Order Processing	PR1034	0.00	0.00	312.00	312.00	312.00	0.00
Krishna, Sai	Online System Enhancements	PR1038	320.00	0.00	320.00	320.00	0.00	0.00
Murphy, Carolyn	CRM Enhancements	PR1029	0.00	0.00	208.00	208.00	208.00	0.00
Murphy, Carolyn	Client Services Application	PR1005	0.00	0.00	200.00	200.00	200.00	0.00
Murphy, Carolyn	Email SAN Storage Implementation	PR1022	0.00	0.00	600.00	600.00	600.00	0.00
Murphy, Carolyn	Global Order Processing	PR1034	0.00	0.00	144.00	144.00	144.00	0.00
Murphy, Carolyn	Online Order Entry	PR1007	0.00	0.00	400.00	400.00	400.00	0.00
Murphy, Carolyn	Online Orders	PR1006	0.00	0.00	152.00	152.00	152.00	0.00
Murphy, Carolyn	Order Management	PR1010	0.00	0.00	176.00	176.00	176.00	0.00

Report Prerequisites:

- The resource must have the employment type field completed on the resource. This is a required field in Clarity.
- The resource must be assigned to at least one investment during the reporting period selected to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The baseline amounts are calculated based on the current baseline revision and the time slice with the name MONTHLYRESOURCEBASECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The actual amounts are calculated based on the time slice with the name MONTHLYRESOURCEACTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The ETC amounts are calculated based on the time slice with the name MONTHLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Resource Baseline vs. Plan by Employment Type
ID:	CSP_RES_BaseVsPlanByEmpType
Description:	Resource Baseline vs. Plan by Employment Type (CSP)
Executable Name:	/CSP/Resource Baseline vs Plan by Employment Type

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Start Date param_from_date	Relative Date		Yes Start of Current Quarter
End Date param_to_date	Relative Date		Yes End of Next Quarter
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Completed Tasks Only? param_t_status	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Show Graph? param_show_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Unit Type: FTE, Hours

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date and End Date parameters allow you to control the months that display in the report. The start date entered determines the first month of data included in the baseline, actual, ETC, EAC, and variance values as well as the first month displayed in the chart. The end date determines the month thru which data is included in the report and it is the last month displayed in the chart.
- The Completed Tasks Only parameter allows you to control which tasks display in the report. If the parameter is checked, the report includes only tasks with a status of 'Completed'. If the parameter is not checked, then it includes all tasks regardless of status.
- The Show Graph parameter controls whether the Baseline vs. EAC by Month chart displays on the report. If the parameter is checked, the chart will display at the top of each employment type section in the report. If the parameter is not checked, the chart will not display.

Report Fields and Calculations:
The report displays the resource name, investment name, investment ID, baseline, actual, ETC, EAC, variance, and % variance across investments. When the show graph parameter is checked, the report also includes a column chart showing baseline versus estimate at completion, in hours or FTEs, by month. Labor is included in the report; equipment, expense and material resources are excluded.

The report is grouped by employment type, which is an attribute on the resource. The lookup associated to the employment type attribute is a configurable system lookup in Clarity. This means that lookup values may be added or modified for the purposes of managing resources in Clarity and grouping them in this report.

The amounts are calculated for a range of periods determined by the start date and end date report parameters.

This report contains the following calculations:

EAC	The EAC field is the sum of the ETC and actual amounts. **Formula:** ETC + Actual

Variance	The variance field is the difference between EAC and baseline amounts. If no baseline exists, the baseline amounts will be set to 0 and the variance will be calculated as if the baseline amounts are 0. **Variance background color is determined as follows:** Red — The EAC amount exceeds the baseline amount. **Formula:** EAC - Baseline
% Variance	The % variance field is the percentage of variance between EAC and baseline amounts. If no baseline exists, the baseline amounts will be set to 0 and the variance will be calculated as if the baseline amounts are 0. **% Variance background color is determined as follows:** Red — The EAC amount exceeds the baseline amount. **Formula:** ((EAC – Baseline) / Baseline) * 100

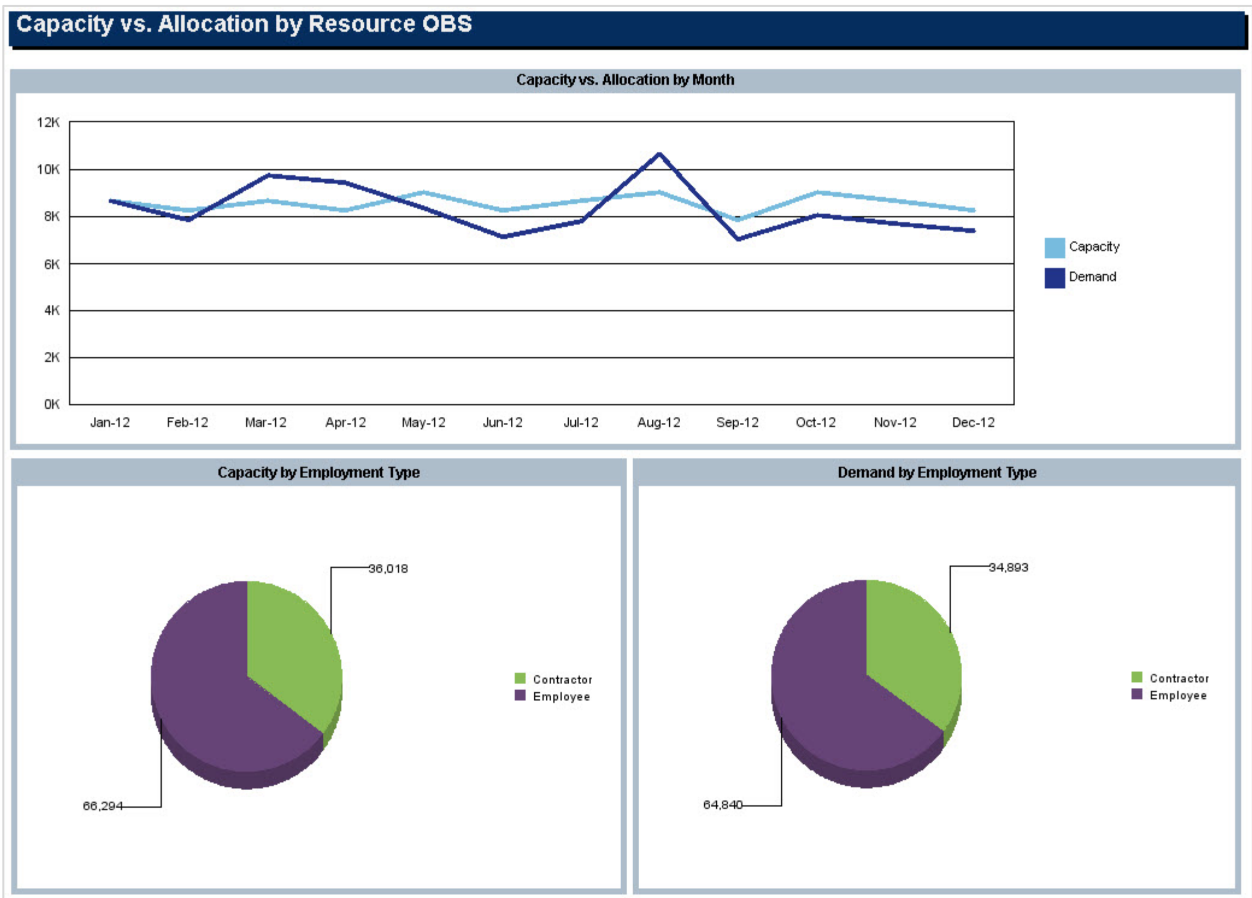
Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
All tasks are included, unless the Completed Tasks Only parameter is checked.	(t.prStatus = CASE WHEN {?param_t_status} = 1 THEN 2 ELSE t.prStatus END)	All tasks, regardless of status, are included by default. If the Completed Tasks Only parameter is checked, then only tasks with a status of 'Completed' are included in the report.
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEBASECURVE') prj_blb_slicerequests.request_name IN ('MONTHLYRESOURCEACTCURVE', 'MONTHLYRESOURCEESTCURVE')	Time slices with the names of MONTHLYRESOURCEBASECURVE, MONTHLYRESOURCEACTCURVE, and MONTHLYRESOURCEESTCURVE are required for this report.

Capacity vs. Allocation by OBS

The Capacity vs. Allocation by OBS report includes three charts displaying capacity versus demand by period, capacity by employment type, and demand by employment type. The report also includes a detail listing of resource capacity and demand across investments. The report may be grouped by any OBS level, providing visibility into resources at any level of the organization. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

This report allows you to drill down to the Allocation by Resource OBS and Investment subreport, by clicking on an investment name, to see more information about the investment resource allocations.



Report Page 1: Capacity vs. Allocation Summary Charts

Capacity vs. Allocation by Resource OBS

Investment	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Development													
	Allocation by Month (Hours)												
Capacity	6,336.00	6,048.00	6,336.00	6,048.00	6,624.00	6,048.00	6,336.00	6,624.00	5,760.00	6,624.00	6,336.00	6,048.00	75,168.00
Demand	6,356.00	6,068.00	6,528.00	6,122.00	6,238.00	5,848.00	5,634.00	6,764.00	6,044.00	6,748.00	6,437.00	6,129.00	74,916.00
Client Services Application	1,232.00	1,176.00	1,232.00	1,176.00	1,288.00	1,176.00	1,232.00	1,288.00	1,120.00	1,288.00	1,232.00	1,176.00	14,616.00
eCommerce Portal	792.00	838.00	308.00	278.00	414.00	378.00	328.00	206.00	180.00	24.00	0.00	0.00	3,746.00
Global Expense Application	440.00	420.00	440.00	420.00	460.00	420.00	440.00	460.00	400.00	460.00	440.00	400.00	5,200.00
Global Order Processing	0.00	0.00	456.00	464.00	496.00	336.00	352.00	552.00	680.00	776.00	744.00	712.00	5,568.00
Online Order Catalog	1,136.00	1,088.00	1,136.00	1,088.00	1,184.00	1,088.00	1,136.00	1,184.00	1,000.00	1,144.00	1,096.00	1,048.00	13,328.00
Online Order Entry	1,952.00	1,906.00	1,880.00	1,936.00	1,378.00	1,346.00	962.00	1,711.00	496.00	570.00	545.00	520.00	15,202.00
Online Orders	588.00	472.00	456.00	288.00	376.00	358.00	368.00	603.00	1,296.00	1,490.00	1,425.00	1,360.00	9,080.00
Online System Enhancements	0.00	0.00	204.00	432.00	306.00	418.00	600.00	646.00	40.00	40.00	40.00	40.00	2,766.00
Web Application Enhancement	216.00	168.00	416.00	40.00	336.00	328.00	216.00	114.00	832.00	956.00	915.00	873.00	5,410.00
Remaining Capacity	-20.00	-20.00	-192.00	-74.00	386.00	200.00	702.00	-140.00	-284.00	-124.00	-101.00	-81.00	252.00
Shared Services													
	Allocation by Month (Hours)												
Capacity	2,288.00	2,184.00	2,288.00	2,184.00	2,392.00	2,184.00	2,288.00	2,392.00	2,080.00	2,392.00	2,288.00	2,184.00	27,144.00
Demand	2,268.00	2,084.00	2,282.00	2,292.00	2,134.00	1,888.00	1,892.00	2,852.00	1,720.00	1,880.00	1,824.00	1,704.00	24,820.00
Client Services Application	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
eCommerce Portal	352.00	594.00	204.00	0.00	0.00	0.00	0.00	86.00	20.00	24.00	0.00	0.00	1,280.00
Global Expense Application	82.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	160.00	1,978.00
Global Order Processing	0.00	0.00	456.00	504.00	120.00	256.00	304.00	328.00	480.00	552.00	528.00	504.00	4,032.00
Online Order Entry	1,016.00	722.00	960.00	556.00	984.00	568.00	476.00	1,182.00	160.00	184.00	176.00	168.00	7,152.00
Online System Enhancements	114.00	0.00	238.00	648.00	510.00	608.00	640.00	748.00	260.00	200.00	240.00	200.00	4,406.00
Web Application Enhancement	528.00	440.00	72.00	248.00	152.00	120.00	120.00	140.00	480.00	552.00	528.00	504.00	3,884.00
Remaining Capacity	20.00	100.00	6.00	-108.00	258.00	296.00	396.00	-460.00	360.00	512.00	464.00	480.00	2,324.00
Grand Total													
Capacity	**8,624.00**	**8,232.00**	**8,624.00**	**8,232.00**	**9,016.00**	**8,232.00**	**8,624.00**	**9,016.00**	**7,840.00**	**9,016.00**	**8,624.00**	**8,232.00**	**102,312.00**
Demand	**8,624.00**	**8,152.00**	**8,810.00**	**8,414.00**	**8,372.00**	**7,736.00**	**7,526.00**	**9,616.00**	**7,764.00**	**8,628.00**	**8,261.00**	**7,833.00**	**99,736.00**
Remaining Capacity	**0.00**	**80.00**	**-186.00**	**-182.00**	**644.00**	**496.00**	**1,098.00**	**-600.00**	**76.00**	**388.00**	**363.00**	**399.00**	**2,576.00**

Report Page 2: Capacity vs. Allocation Detail by Investment

Allocation by Resource OBS and Investment Subreport

The Allocation by Resource OBS and Investment subreport displays resource allocation amounts for each resource allocated to the investment. The OBS displayed at the top of the report is the resource OBS of the resources allocated to the investment. The subreport displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Allocation by Resource OBS and Investment

Resource	Investment Role	Booking	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Development															
			Allocation by Month (Hours)												
eCommerce Portal															
Hill, Wayne	Developer	Soft	204.00	180.00	176.00	44.00	0.00	0.00	0.00	0.00	40.00	0.00	0.00	0.00	644.00
Martin, Paul	Project Manager	Soft	168.00	84.00	8.00	0.00	0.00	0.00	0.00	54.00	20.00	24.00	0.00	0.00	358.00
Morris, Tom	Architect	Soft	124.00	180.00	16.00	0.00	0.00	0.00	0.00	0.00	40.00	0.00	0.00	0.00	360.00
Patel, Sanjay	Developer	Soft	88.00	84.00	8.00	84.00	92.00	84.00	56.00	0.00	0.00	0.00	0.00	0.00	496.00
Stoneburg, Sam	Network Engineer	Soft	136.00	168.00	16.00	44.00	92.00	84.00	86.00	48.00	40.00	0.00	0.00	0.00	714.00
Storage Architect	Storage Architect	Soft	0.00	16.00	72.00	0.00	0.00	0.00	0.00	0.00	40.00	0.00	0.00	0.00	128.00
Turner, Bruce	Test Engineer	Soft	72.00	126.00	12.00	106.00	230.00	210.00	186.00	104.00	0.00	0.00	0.00	0.00	1,046.00
Total			**792.00**	**838.00**	**308.00**	**278.00**	**414.00**	**378.00**	**328.00**	**206.00**	**180.00**	**24.00**	**0.00**	**0.00**	**3,746.00**

Report Prerequisites:

- Resource capacity amounts display if the resource has availability defined and meets the parameter criteria.
- Resource demand allocation amounts display if the resource is allocated to at least one investment. Resource assignments are not required.

- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.
- The OBS level group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of resources to an OBS unit because the association of resources to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added resources to an OBS unit, removed resources from an OBS unit, or moved resources from one OBS unit to another.

Report Definition:

Name:	Capacity vs. Allocation by OBS
ID:	CSP_RES_CapVsAllocByOBS
Description:	Capacity vs. Allocation by OBS (CSP)
Executable Name:	/CSP/Capacity vs Allocation by OBS

Report Parameters:

Parameter Label **Bind Parameter Code**	**Type** **Style**	**Lookup Name** **Lookup ID**	**Required** **Default Value**
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	Yes
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Include Unstaffed Roles? param_unstaffed	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (OBS Level) CSP_RPT_CMN_OBS_GROUP	Yes OBS Level 1
Show Graph? param_show_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Investment Status: All, Approved, Unapproved
Period Type: Week, Month
Unit Type: FTE, Hours

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources include in the report. When you select an OBS unit in this parameter, the report will include the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS. For the allocation demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.
- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report demand allocation amounts. If the parameter is checked, then unstaffed roles are included in the report. If the parameter is not checked, then unstaffed roles are not included in the report.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

OBS Level 1-10	This option requires that you select a unit in the resource OBS parameter in order to group by an OBS level. The resource OBS parameter and grouping by an OBS level work in conjunction with one another. The resource OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the resources attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the resources by this level (e.g. OBS Level 4). If resources are associated to units above level 4 (e.g., resources are attached to levels 2 and 3), then the resources associated to units higher in the hierarchy will display

in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the resource at the level by which you are grouping.

If you group by an OBS level but you do not select a unit in the resource OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the resource OBS parameter to determine which OBS to use for grouping.

- The Show Graph parameter controls whether the line chart and pie charts display in the report. If the parameter is checked, the charts will display on the first page of the report. If the parameter is not checked, the charts will not display.

Report Fields and Calculations:

The report displays the capacity and demand amounts by period and in total, grouped by OBS unit. The report also displays demand amounts by investment. Labor and equipment resources are included in the report; expense and material resources are excluded.

The capacity amounts include the capacity for resources that have an OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. The allocation demand amounts include allocations for team staff members that have a staff OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. If the staff OBS unit is not completed for the team members, then it uses the OBS of the resource for demand.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report. The remaining capacity field on the report has a red background if the value is a negative number, no background if the value is zero, and a green background if the value is a positive number.

When the show graph parameter is checked, the report also includes a line chart and two pie charts. The line chart displays capacity versus allocation demand by period. The pie charts display capacity by employment type and allocation demand by employment type.

Subreport Fields and Calculations:

The subreport displays the resource OBS unit of the resources allocated to the investment and the investment name from the main report. It also lists the resource name, investment role, booking status, and allocation amounts by period and in total. Labor and equipment resources are included in the subreport; expense and material resources are excluded.

The allocation amounts are calculated the same as the main report and include allocations for team staff members that have a staff OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. If the staff OBS unit is not completed for the team members, then it uses the OBS of the resource for demand. The start date and period type displayed in the subreport are determined the same as in the main report.

Report Security and Technical Details:

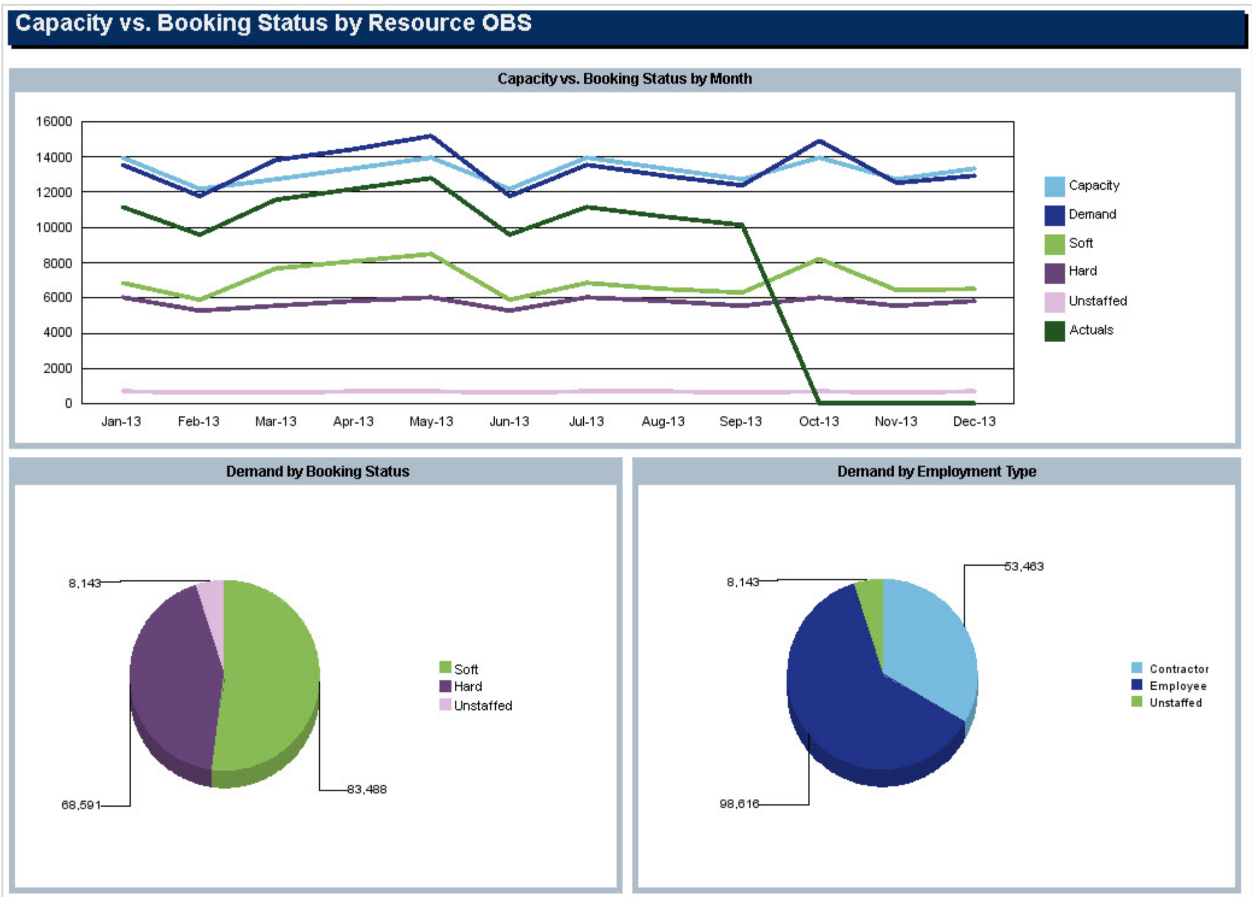
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Topic	Database Statement	Additional Explanation
Resources only are included in demand allocation amounts, unless the Include Unstaffed Roles parameter is checked.	({?param_unstaffed} = 1 OR ({?param_unstaffed} = 0 AND r.person_type <> 0))	Roles are excluded from demand allocation amounts by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.
The OBS unit name, displayed when the report is grouped by an OBS level, is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND prj_obs_associations.table_name = 'SRM_RESOURCES'	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), and WEEKLYRESOURCEALLOCCURVE (ID=55558) are required for this report.

Capacity vs. Booking Status by OBS

The Capacity vs. Booking Status by OBS report includes three charts. The line chart displays capacity versus demand, with demand distributed by booking status, and actuals by period. The pie charts display demand by booking status and demand by employment type. The report also includes a detail listing of resource capacity and demand at the booking status level across investments. The report may be grouped by any OBS level, providing visibility into resources at any level of the organization. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.



Report Page 1: Capacity vs. Booking Status Summary Charts

Capacity vs. Booking Status by Resource OBS

	Allocation by Month (Hours)												
Investment	**Jan-13**	**Feb-13**	**Mar-13**	**Apr-13**	**May-13**	**Jun-13**	**Jul-13**	**Aug-13**	**Sep-13**	**Oct-13**	**Nov-13**	**Dec-13**	**Total**
Development													
Capacity	12,328.00	10,720.00	11,256.00	11,792.00	12,328.00	10,720.00	12,328.00	11,792.00	11,256.00	12,328.00	11,256.00	11,792.00	139,896.00
Demand	12,318.80	10,639.20	12,511.80	13,103.20	13,782.52	10,639.20	12,318.80	11,703.12	11,247.60	13,659.24	11,247.60	11,703.12	144,874.20
eCommerce Portal													
Hard	2,465.60	2,144.00	2,251.20	2,358.40	2,465.60	2,144.00	2,465.60	2,358.40	2,251.20	2,465.60	2,251.20	2,358.40	27,979.20
Soft	3,477.60	2,916.80	4,439.40	4,608.56	4,941.32	2,916.80	3,477.60	3,208.48	3,175.20	4,778.48	3,175.20	3,208.48	44,323.92
Unstaffed	441.60	384.00	403.20	422.40	441.60	384.00	441.60	422.40	403.20	441.60	403.20	422.40	5,011.20
Actuals	4,823.00	4,076.00	5,688.00	5,928.00	6,372.00	4,076.00	4,824.00	4,504.00	4,386.00	0.00	0.00	0.00	44,677.00
Web Application Enhancement													
Hard	3,082.00	2,680.00	2,814.00	2,948.00	3,082.00	2,680.00	3,082.00	2,948.00	2,814.00	3,082.00	2,814.00	2,948.00	34,974.00
Soft	2,686.40	2,370.40	2,452.80	2,607.44	2,686.40	2,370.40	2,686.40	2,607.44	2,452.80	2,725.96	2,452.80	2,607.44	30,706.68
Unstaffed	165.60	144.00	151.20	158.40	165.60	144.00	165.60	158.40	151.20	165.60	151.20	158.40	1,879.20
Actuals	4,740.00	4,122.00	4,310.00	4,554.00	4,734.00	4,128.00	4,752.00	4,588.00	4,298.00	0.00	0.00	0.00	40,226.00
Remaining Capacity	9.20	80.80	-1,255.80	-1,311.20	-1,454.52	80.80	9.20	88.88	8.40	-1,331.24	8.40	88.88	-4,978.20
Shared Services													
Capacity	1,656.00	1,440.00	1,512.00	1,584.00	1,656.00	1,440.00	1,656.00	1,584.00	1,512.00	1,656.00	1,512.00	1,584.00	18,792.00
Demand	1,297.20	1,132.80	1,320.48	1,399.20	1,468.32	1,132.80	1,297.20	1,246.08	1,184.40	1,302.72	1,320.48	1,246.08	15,347.76
Web Application Enhancement													
Hard	496.80	432.00	453.60	475.20	496.80	432.00	496.80	475.20	453.60	496.80	453.60	475.20	5,637.60
Soft	690.00	604.80	766.08	818.40	861.12	604.80	690.00	665.28	630.00	695.52	766.08	665.28	8,457.36
Unstaffed	110.40	96.00	100.80	105.60	110.40	96.00	110.40	105.60	100.80	110.40	100.80	105.60	1,252.80
Actuals	1,566.00	1,348.00	1,548.00	1,656.00	1,738.00	1,348.00	1,566.00	1,502.00	1,412.00	0.00	0.00	0.00	13,684.00
Remaining Capacity	358.80	307.20	191.52	184.80	187.68	307.20	358.80	337.92	327.60	353.28	191.52	337.92	3,444.24
Grand Total													
Capacity	**13,984.00**	**12,160.00**	**12,768.00**	**13,376.00**	**13,984.00**	**12,160.00**	**13,984.00**	**13,376.00**	**12,768.00**	**13,984.00**	**12,768.00**	**13,376.00**	**158,688.00**
Demand	**13,616.00**	**11,772.00**	**13,832.28**	**14,502.40**	**15,250.84**	**11,772.00**	**13,616.00**	**12,949.20**	**12,432.00**	**14,961.96**	**12,568.08**	**12,949.20**	**160,221.96**
Hard	**6,044.40**	**5,256.00**	**5,518.80**	**5,781.60**	**6,044.40**	**5,256.00**	**6,044.40**	**5,781.60**	**5,518.80**	**6,044.40**	**5,518.80**	**5,781.60**	**68,590.80**
Soft	**6,854.00**	**5,892.00**	**7,658.28**	**8,034.40**	**8,488.84**	**5,892.00**	**6,854.00**	**6,481.20**	**6,258.00**	**8,199.96**	**6,394.08**	**6,481.20**	**83,487.96**
Unstaffed	**717.60**	**624.00**	**655.20**	**686.40**	**717.60**	**624.00**	**717.60**	**686.40**	**655.20**	**717.60**	**655.20**	**686.40**	**8,143.20**
Actuals	**11,129.00**	**9,546.00**	**11,546.00**	**12,138.00**	**12,844.00**	**9,552.00**	**11,142.00**	**10,594.00**	**10,096.00**	**0.00**	**0.00**	**0.00**	**98,587.00**
Remaining Capacity	**368.00**	**388.00**	**-1,064.28**	**-1,126.40**	**-1,266.84**	**388.00**	**368.00**	**426.80**	**336.00**	**-977.96**	**199.92**	**426.80**	**-1,533.96**

Report Page 2: Capacity vs. Booking Status Detail by Investment

Report Prerequisites:

- Resource capacity amounts display if the resource has availability defined and meets the parameter criteria.
- Resource demand allocation amounts display if the resource is allocated to at least one investment. Resource assignments are not required.
- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The total demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The hard allocation amounts are calculated based on the time slices with the name MONTHLYRESOURCEHARDALLOC and WEEKLYRESOURCEHARDALLOC (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The soft allocation amounts are calculated as the difference between the total allocation demand amounts and hard allocation amounts. There are no soft allocation slice requests.

- The actual amounts are calculated based on the time slices with the name MONTHLYRESOURCEACTCURVE and WEEKLYRESOURCEACTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.
- The OBS level group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of resources to an OBS unit because the association of resources to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added resources to an OBS unit, removed resources from an OBS unit, or moved resources from one OBS unit to another.

Report Definition:

Name:	Capacity vs. Booking Status by OBS
ID:	CSP_RES_CapVsBookingByOBS
Description:	Capacity vs. Booking Status by OBS (CSP)
Executable Name:	/CSP/Capacity vs Booking Status by OBS

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	Yes
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Show Investments? param_show_investment	Checkbox		No Checked
Include Unstaffed Roles? param_unstaffed	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (OBS Level) CSP_RPT_CMN_OBS_GROUP	Yes OBS Level 1
Show Graphs? param_show_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Status: All, Approved, Unapproved
Employment Type: Contractor, Employee
Investment Status: All, Approved, Unapproved
Period Type: Week, Month
Unit Type: FTE, Hours

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources include in the report. When you select an OBS unit in this parameter, the report will include the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS. For the allocation demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.
- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- There is a Show Investments? parameter that allows you to preclude individual investments from displaying in the report. If the parameter is checked, then investments will display in the report to provide investment level detail of demand. If the parameter is not checked, then investments will not display in the report. In this case, the report will display resource capacity, demand, and remaining capacity amounts without the investment level detail.
- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report demand allocation amounts. If the parameter is checked, then unstaffed roles are included in the report. If the parameter is not checked, then unstaffed roles are not included in the report.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

OBS Level 1-10	This option requires that you select a unit in the resource OBS parameter in order to group by an OBS level. The resource OBS parameter and grouping by an OBS level work in conjunction with one another. The resource OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the resources attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the resources by this level (e.g. OBS Level 4). If resources are associated to units above level 4 (e.g., resources are attached to levels 2 and 3), then the resources associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates

that there is no OBS unit defined for the resource at the level by which you are grouping.

If you group by an OBS level but you do not select a unit in the resource OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the resource OBS parameter to determine which OBS to use for grouping.

- The Show Graph parameter controls whether the line chart and pie charts display in the report. If the parameter is checked, the charts will display on the first page of the report. If the parameter is not checked, the charts will not display.

Report Fields and Calculations:
The report displays the capacity and demand amounts by period and in total, grouped by OBS unit. The report also displays demand amounts by investment if the show investments parameter is checked. Labor and equipment resources are included in the report; expense and material resources are excluded.

The capacity amounts include the capacity for resources that have an OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. The allocation demand amounts include allocations for team staff members that have a staff OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. If the staff OBS unit is not completed for the team members, then it uses the OBS of the resource for demand.

The demand amounts are separated into hard and soft allocations. The actual hours posted also display. When the show investments parameter is checked, the report displays hard allocations, soft allocations, and actuals by investment name.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report. The remaining capacity field on the report has a red background if the value is a negative number, no background if the value is zero, and a green background if the value is a positive number.

When the show graph parameter is checked, the report also includes a line chart and two pie charts. The line chart displays capacity versus demand, with demand distributed by booking status, and actuals by period. The pie charts display demand by booking status and demand by employment type.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
Resources only are included in demand allocation amounts, unless the Include Unstaffed Roles parameter is checked.	({?param_unstaffed} = 1 OR ({?param_unstaffed} = 0 AND r.person_type <> 0))	Roles are excluded from demand allocation amounts by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.

Topic	Database Statement	Additional Explanation
The OBS unit name, displayed when the report is grouped by an OBS level, is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND prj_obs_associations.table_name = 'SRM_RESOURCES'	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 60004 ELSE 306 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEHARDALLOC (ID=60004), WEEKLYRESOURCEHARDALLOC (ID=306), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Capacity vs. Demand by Role

The Capacity vs. Demand by Role report displays capacity and demand at the role level across investments. The report gives you visibility into the capacity, demand, and remaining capacity by role. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Capacity vs. Demand by Role

		Allocation by Month (Hours)												
Role		Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Architect	Capacity	528.00	504.00	528.00	504.00	552.00	504.00	528.00	552.00	480.00	552.00	528.00	504.00	6,264.00
	Demand	576.00	632.00	624.00	460.00	556.00	504.00	504.00	588.00	720.00	828.00	792.00	752.00	7,536.00
	Remaining	-48.00	-128.00	-96.00	44.00	-4.00	0.00	24.00	-36.00	-240.00	-276.00	-264.00	-248.00	-1,272.00
Business Analyst	Capacity	1,760.00	1,680.00	1,760.00	1,680.00	1,840.00	1,680.00	1,760.00	1,840.00	1,600.00	1,840.00	1,760.00	1,680.00	20,880.00
	Demand	2,296.00	2,372.00	2,492.00	2,472.00	1,730.00	1,836.00	1,584.00	2,347.00	1,100.00	1,260.00	1,184.00	1,128.00	21,801.00
	Remaining	-536.00	-692.00	-732.00	-792.00	110.00	-156.00	176.00	-507.00	500.00	580.00	576.00	552.00	-921.00
DBA	Capacity	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Demand	256.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,168.00
	Remaining	-80.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-80.00
Developer	Capacity	1,232.00	1,176.00	1,232.00	1,176.00	1,288.00	1,176.00	1,232.00	1,288.00	1,120.00	1,288.00	1,232.00	1,176.00	14,616.00
	Demand	1,012.00	1,128.00	1,180.00	944.00	1,038.00	932.00	1,018.00	1,107.00	1,184.00	1,308.00	1,253.00	1,193.00	13,297.00
	Remaining	220.00	48.00	52.00	232.00	250.00	244.00	214.00	181.00	-64.00	-20.00	-21.00	-17.00	1,319.00
Network Engineer	Capacity	704.00	672.00	704.00	672.00	736.00	672.00	704.00	736.00	640.00	736.00	704.00	672.00	8,352.00
	Demand	844.00	760.00	686.00	544.00	990.00	794.00	822.00	862.00	760.00	828.00	792.00	752.00	9,434.00
	Remaining	-140.00	-88.00	18.00	128.00	-254.00	-122.00	-118.00	-126.00	-120.00	-92.00	-88.00	-80.00	-1,082.00
Project Manager	Capacity	1,232.00	1,176.00	1,232.00	1,176.00	1,288.00	1,176.00	1,232.00	1,288.00	1,120.00	1,288.00	1,232.00	1,176.00	14,616.00
	Demand	728.00	400.00	610.00	676.00	542.00	644.00	592.00	782.00	820.00	944.00	880.00	840.00	8,458.00
	Remaining	504.00	776.00	622.00	500.00	746.00	532.00	640.00	506.00	300.00	344.00	352.00	336.00	6,158.00
Storage Architect	Capacity	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Demand	408.00	480.00	424.00	336.00	368.00	336.00	352.00	400.00	520.00	552.00	528.00	504.00	5,208.00
	Remaining	-232.00	-312.00	-248.00	-168.00	-184.00	-168.00	-176.00	-216.00	-360.00	-368.00	-352.00	-336.00	-3,120.00
Test Engineer	Capacity	528.00	504.00	528.00	504.00	552.00	504.00	528.00	552.00	480.00	552.00	528.00	504.00	6,264.00
	Demand	632.00	626.00	692.00	606.00	922.00	718.00	706.00	764.00	920.00	1,052.00	1,008.00	960.00	9,606.00
	Remaining	-104.00	-122.00	-164.00	-102.00	-370.00	-214.00	-178.00	-212.00	-440.00	-500.00	-480.00	-456.00	-3,342.00
Grand Total	**Capacity**	**6,336.00**	**6,048.00**	**6,336.00**	**6,048.00**	**6,624.00**	**6,048.00**	**6,336.00**	**6,624.00**	**5,760.00**	**6,624.00**	**6,336.00**	**6,048.00**	**75,168.00**
	Demand	**6,752.00**	**6,566.00**	**6,884.00**	**6,206.00**	**6,330.00**	**5,932.00**	**5,754.00**	**7,034.00**	**6,184.00**	**6,956.00**	**6,613.00**	**6,297.00**	**77,508.00**
	Remaining	**-416.00**	**-518.00**	**-548.00**	**-158.00**	**294.00**	**116.00**	**582.00**	**-410.00**	**-424.00**	**-332.00**	**-277.00**	**-249.00**	**-2,340.00**

Report Prerequisites:

- Role capacity amounts display if a resource has the role set as their primary role. The resource must also have availability defined and meet the parameter criteria.
- Role demand allocation amounts display if a resource has the role set as their primary role. The resource must also be allocated to at least one investment and the report must display type of hours as allocations. Resource demand assignment amounts display if a resource has the role set as their primary role. The resource must also be assigned to at least one task on an investment and the report must display type of hours as assignments.
- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- When the report displays type of hours as allocations, the demand amounts are calculated based on the time slices with the names of MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- When the report displays type of hours as assignments, the demand amounts are calculated based on the time slices with the names of MONTHLYRESOURCEACTCURVE, WEEKLYRESOURCEACTCURVE, MONTHLYRESOURCEESTCURVE, and WEEKLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Capacity vs. Demand by Role
ID:	CSP_RES_CapVsDemandByRole
Description:	Capacity vs. Demand by Role (CSP)
Executable Name:	/CSP/Capacity vs Demand by Role

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Type of Hours param_hours_type	Pull-down Single-select	Type Of Hours RPT_HOURS_TYPE	Yes Allocated
Show Roles With No Capacity? param_incl_no_cap	Checkbox		No Unchecked
Include Unstaffed Roles? param_incl_unstaffed	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Type of Hours: Allocated, Assigned
Investment Status: All, Approved, Unapproved

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources to include in the report. When you select an OBS unit in this parameter, the report will include the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS.
For the allocation or assignment demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.

- The Investment OBS parameter allows you to control which investments are included in the report demand amounts. When you select an OBS unit in this parameter, the report will include the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report. The following options are available:

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- The Type of Hours parameter allows you to change the display amounts. The following options are available:

Allocated	The report displays allocation amounts.
Assigned	The report displays assignment amounts.

- There is a Show Roles With No Capacity parameter that allows you to include roles that have zero capacity in the report. If the parameter is checked, then roles with zero capacity will be included in the report. If the parameter is not checked, then roles with zero capacity are not included in the report. Roles capacity is determined by the capacity of the resources that have the role as a primary role. If the resources associated to a primary role have no capacity, then the role has no capacity.
- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report demand allocation amounts. If the parameter is checked, then unstaffed roles are included in the report. If the parameter is not checked, then unstaffed roles are not included in the report.

Report Fields and Calculations:

The report displays the role name, capacity, demand and remaining amounts by period and in total. Labor and equipment resources and roles are included in the report; expense and material resources and roles are excluded.

The capacity amounts include the capacity for resources that have an OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. The capacity amounts are grouped by the resource primary role. The allocation or assignment demand amounts include team staff members that have a staff OBS unit the same as or a descendant of the resource OBS unit selected in the parameter. If the staff OBS unit is not completed for the team members, then it uses the OBS of the resource for demand. The demand amounts are grouped by the investment role and if it is not completed, then they are grouped by the resource primary role.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The remaining capacity field on the report has a red background if the value is a negative number, no background if the value is zero, and a green background if the value is a positive number.

Report Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded	inv_projects.is_template = 0	
Labor and equipment roles and resources are included in report amounts.	srm_resources.resource_type <= 1	Expense and material roles and resources are excluded in report amounts.
Resources only are included in demand allocation amounts, unless the Include Unstaffed Roles parameter is checked.	({?param_incl_unstaffed} = 1 OR r.person_type <> 0)	Roles are excluded from demand allocation amounts by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END (prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 5 ELSE 55557 END OR prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END)	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEESTCURVE (ID=5), WEEKLYRESOURCEESTCURVE (ID=55557), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Capacity vs. Demand by Resource

The Capacity vs. Demand by Resource report displays resource capacity and demand at the resource level across investments. The report gives you visibility into the capacity, demand, and remaining capacity by resource. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Capacity vs. Demand by Resource

	Allocation by Month (Hours)												
Resource / Investment	**Jan-12**	**Feb-12**	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**	**Sep-12**	**Oct-12**	**Nov-12**	**Dec-12**	**Total**
Childers, Valerie	**Primary Role: Architect**												
Capacity	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Demand	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	200.00	194.00	196.00	178.00	2,168.00
Online Order Catalog	40.00	64.00	88.00	120.00	120.00	92.00	112.00	88.00	120.00	120.00	108.00	98.00	1,170.00
Online Orders	136.00	104.00	88.00	48.00	64.00	76.00	64.00	96.00	80.00	74.00	88.00	80.00	998.00
Remaining Capacity	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	-10.00	-20.00	-10.00	-80.00
Evans, Sean	**Primary Role: Developer**												
Capacity	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Demand	176.00	168.00	176.00	168.00	184.00	168.00	256.00	184.00	160.00	184.00	176.00	168.00	2,168.00
Online System Enhancements	0.00	64.00	68.00	108.00	32.00	114.00	112.00	136.00	40.00	40.00	40.00	40.00	794.00
Vacation Time	0.00	0.00	0.00	0.00	0.00	0.00	80.00	0.00	0.00	0.00	0.00	0.00	80.00
Web Application Enhancement	176.00	104.00	108.00	60.00	152.00	54.00	64.00	48.00	120.00	144.00	136.00	128.00	1,294.00
Remaining Capacity	0.00	0.00	0.00	0.00	0.00	0.00	-80.00	0.00	0.00	0.00	0.00	0.00	-80.00
Goldman, Mark	**Primary Role: Business Analyst**												
Capacity	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Demand	176.00	168.00	176.00	168.00	184.00	168.00	160.00	192.00	60.00	64.00	40.00	40.00	1,596.00
eCommerce Portal	62.00	88.00	116.00	0.00	0.00	0.00	0.00	54.00	20.00	24.00	0.00	0.00	364.00
Online System Enhancements	114.00	80.00	60.00	168.00	184.00	168.00	160.00	138.00	40.00	40.00	40.00	40.00	1,232.00
Remaining Capacity	0.00	0.00	0.00	0.00	0.00	0.00	16.00	-8.00	100.00	120.00	136.00	128.00	492.00
Granger, Paula	**Primary Role: Project Manager**												
Capacity	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Demand	176.00	168.00	176.00	168.00	174.00	152.00	160.00	184.00	160.00	184.00	176.00	168.00	2,046.00
Global Order Processing	0.00	0.00	76.00	64.00	72.00	0.00	0.00	80.00	160.00	184.00	176.00	168.00	980.00
Online System Enhancements	176.00	168.00	100.00	104.00	102.00	152.00	160.00	104.00	0.00	0.00	0.00	0.00	1,066.00
Remaining Capacity	0.00	0.00	0.00	0.00	10.00	16.00	16.00	0.00	0.00	0.00	0.00	0.00	42.00
Grand Total													
Capacity	**704.00**	**672.00**	**704.00**	**672.00**	**736.00**	**672.00**	**704.00**	**736.00**	**640.00**	**736.00**	**704.00**	**672.00**	**8,352.00**
Demand	**704.00**	**672.00**	**704.00**	**672.00**	**726.00**	**656.00**	**752.00**	**744.00**	**580.00**	**626.00**	**588.00**	**554.00**	**7,978.00**
Remaining Capacity	**0.00**	**0.00**	**0.00**	**0.00**	**10.00**	**16.00**	**-48.00**	**-8.00**	**60.00**	**110.00**	**116.00**	**118.00**	**374.00**

Report Prerequisites:

- Resource capacity amounts display if the resource has availability defined and meets the parameter criteria.
- Resource demand allocation amounts display if the resource is allocated to at least one investment and the report displays type of hours as allocations. Resource demand assignment amounts display if the resource is assigned to at least one task on the investment and the report displays type of hours as assignments.
- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- When the report displays type of hours as allocations, the demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- When the report displays type of hours as assignments, the demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEACTCURVE and WEEKLYRESOURCEACTCURVE; and MONTHLYRESOURCEESTCURVE and WEEKLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Capacity vs. Demand by Resource
ID:	CSP_RES_CapVsDemandByResource
Description:	Capacity vs. Demand by Resource (CSP)
Executable Name:	/CSP/Capacity vs Demand by Resource

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Type of Hours param_hours_type	Pull-down Single-select	Type Of Hours RPT_HOURS_TYPE	Yes Allocated
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Show Investments? param_show_inv	Checkbox		No Checked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Type of Hours: Allocated, Assigned
Investment Status: All, Approved, Unapproved

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS.
  For the allocation or assignment demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.
- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.

- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report. The following options are available:

  Week The report displays twelve weeks.
  Month The report displays twelve months.

- The Type of Hours parameter allows you to change the display amounts. The following options are available:

  Allocated The report displays allocation amounts.
  Assigned The report displays assignment amounts.

- There is a Show Investments? parameter that allows you to preclude individual investments from displaying in the report. If the parameter is checked, then investments will display in the report to provide investment level detail of demand. If the parameter is not checked, then investments will not display in the report. In this case, the report will display resource capacity, demand, and remaining capacity amounts without the investment level detail.

Report Fields and Calculations:
The report displays the resource name, investment name, capacity, demand, and remaining amounts by period and in total, grouped by resource. Labor and equipment roles are included in the report; expense and material roles are excluded.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The remaining capacity field on the report has a red background if the value is a negative number, no background if the value is zero, and a green background if the value is a positive number.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Labor and equipment roles or resources are included.	srm_resources.resource_type <= 1	Expense and material roles or resources are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.

Topic	Database Statement	Additional Explanation
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END (prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 5 ELSE 55557 END OR prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END)	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEESTCURVE (ID=5), WEEKLYRESOURCEESTCURVE (ID=55557), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Over/Under Allocation by Role

The Over/Under Allocation by Role report displays resource remaining capacity amounts by role. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

This report allows you to drill down to the Allocation Detail by Role subreport, by clicking on a role name, to see more information about the capacity and demand of the resources having this primary role.

Over/Under Allocation by Role

	Remaining Capacity by Month (Hours)												
Role	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Total
Architect	0.00	0.00	0.00	0.00	48.00	-168.00	-152.00	-168.00	0.00	0.00	0.00	0.00	-440.00
Business Analyst	0.00	0.00	168.00	176.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	344.00
DBA	0.00	0.00	0.00	0.00	0.00	0.00	-46.00	-44.00	0.00	0.00	0.00	0.00	-90.00
Developer	0.00	0.00	0.00	0.00	0.00	-480.00	-552.00	-528.00	-504.00	-552.00	-504.00	-528.00	-3,648.00
Network Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	588.00	644.00	588.00	616.00	2,436.00
Project Manager	0.00	0.00	0.00	141.00	148.00	128.00	0.00	0.00	0.00	0.00	0.00	0.00	417.00
Storage Architect	0.00	0.00	0.00	0.00	0.00	0.00	-46.00	-44.00	0.00	0.00	0.00	0.00	-90.00
Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	736.00	672.00	704.00	2,112.00
Grand Total	**0.00**	**0.00**	**168.00**	**317.00**	**196.00**	**-520.00**	**-796.00**	**-784.00**	**84.00**	**828.00**	**756.00**	**792.00**	**1,041.00**

Allocation Detail by Role Subreport

The Allocation Detail by Role subreport displays resource capacity and demand for each investment to which the resource, having the primary role, is allocated. The subreport displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Allocation Detail by Role

Architect

	Allocation			Allocation by Month (Hours)												
Investment	Booking	Start	Finish	Jan-13	Feb-13	Mar-13	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Total
Coleman, Joyce																
Capacity				184.00	160.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	184.00	168.00	176.00	2,088.00
Demand				184.00	160.00	168.00	176.00	184.00	200.00	224.00	216.00	168.00	184.00	168.00	176.00	2,208.00
eCommerce Portal	Hard	3/1/2013	10/11/2013	0.00	0.00	60.00	26.00	56.00	0.00	0.00	0.00	10.00	34.00	0.00	0.00	186.00
Mobile Advertising	Hard	1/1/2013	5/16/2014	184.00	160.00	108.00	150.00	64.00	182.00	80.00	128.00	158.00	150.00	168.00	176.00	1,708.00
Online Order Improvements	Soft	5/1/2013	8/22/2013	0.00	0.00	0.00	0.00	64.00	18.00	144.00	88.00	0.00	0.00	0.00	0.00	314.00
Remaining				0.00	0.00	0.00	0.00	0.00	-40.00	-40.00	-40.00	0.00	0.00	0.00	0.00	-120.00
Hayes, Justin																
Capacity				184.00	160.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	184.00	168.00	176.00	2,088.00
Demand				184.00	160.00	168.00	176.00	128.00	200.00	216.00	216.00	168.00	184.00	168.00	176.00	2,144.00
Executive Dashboard Visibility	Hard	5/1/2013	9/1/2013	0.00	0.00	0.00	0.00	40.00	40.00	40.00	40.00	0.00	0.00	0.00	0.00	160.00
Mobile Commerce	Soft	7/1/2013	12/31/2013	0.00	0.00	0.00	0.00	0.00	0.00	104.00	176.00	168.00	184.00	168.00	176.00	976.00
Mobile Security	Hard	1/7/2013	7/11/2013	184.00	160.00	168.00	176.00	88.00	160.00	72.00	0.00	0.00	0.00	0.00	0.00	1,008.00
Remaining				0.00	0.00	0.00	0.00	56.00	-40.00	-32.00	-40.00	0.00	0.00	0.00	0.00	-56.00
Ramos, Adriana																
Capacity				184.00	160.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	184.00	168.00	176.00	2,088.00
Demand				184.00	160.00	168.00	176.00	192.00	248.00	264.00	264.00	168.00	184.00	168.00	176.00	2,352.00
eBusiness Mobile Network	Hard	1/3/2013	12/21/2013	184.00	160.00	168.00	176.00	128.00	128.00	184.00	176.00	80.00	140.00	80.00	80.00	1,684.00
Mobile Time and Approvals	Soft	5/1/2013	3/14/2014	0.00	0.00	0.00	0.00	64.00	120.00	80.00	88.00	88.00	44.00	88.00	96.00	668.00
Remaining				0.00	0.00	0.00	0.00	-8.00	-88.00	-80.00	-88.00	0.00	0.00	0.00	0.00	-264.00
Total				0.00	0.00	0.00	0.00	48.00	-168.00	-152.00	-168.00	0.00	0.00	0.00	0.00	-440.00

Report Prerequisites:

- The role must be over allocated or under allocated in at least one of the reporting periods to display on the report. Over allocated roles are roles that have investment allocation demand exceeding available capacity. Over allocated roles display negative remaining capacity on the report. Under allocated roles are roles that have investment allocation demand that is less than available capacity. Under allocated roles display positive remaining capacity on the report.
- In order to calculate remaining capacity, role capacity and demand allocation must be included in the report. Role capacity amounts are included if a resource has the role set as their primary role. The resource must also have availability defined and meet the parameter criteria. Role demand allocation amounts are included if a resource has the role set as their primary role. The resource must also be allocated to at least one investment and meet the parameter criteria. Resource assignments are not required.
- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Over/Under Allocation by Role
ID:	CSP_RES_OverUnderAllocByRole
Description:	Over/Under Allocation by Role (CSP)
Executable Name:	/CSP/Over Under Allocation by Role

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Over/Under Allocated param_over_under	Pull-down Single-select	Report (Over Allocated, Under Allocated) CSP_RPT_RES_OVER_UNDER	Yes Over and Under Allocated
Over Allocated Threshold % (0-100) param_o_threshold	Text		Yes 10
Under Allocated Threshold % (0-100) param_u_threshold	Text		Yes 30
Show Roles With No Capacity? param_incl_no_cap	Checkbox		No Unchecked
Include Unstaffed Roles? param_incl_unstaffed	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Investment Status: All, Approved, Unapproved
Over/Under Allocated: Over and Under Allocated, Over Allocated Only, Under Allocated Only

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources to include in the report. When you select an OBS unit in this parameter, the report will include the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS. For the allocation demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- The Over/Under Allocated parameter allows you to filter roles depending on their allocation state. The following options are available:

Over and Under Allocated	This option includes roles over or under allocated in at least one period displayed in the report. An over allocated role is one whose allocation exceeds available capacity. In other words, they have negative remaining capacity. An under allocated role is one whose allocation is less than available capacity. In other words, they have positive remaining capacity.
Over Allocated Only	This option includes roles over allocated in at least one period displayed in the report. An over allocated role is one whose allocation exceeds available capacity. In other words, they have negative remaining capacity.
Under Allocated Only	This option includes roles under allocated in at least one period displayed in the report. An under allocated role is one whose allocation is less than available capacity. In other words, they have negative remaining capacity.

- The Over Allocated Threshold % parameter allows you to control when the background color turns red for the remaining capacity columns in the report. Roles that are over allocated by a percentage greater than the over allocated threshold percentage parameter will be red in the report. In the above screen capture, the over allocated threshold % parameter entered when running the report is 10%. Entering a value of 10% means that the remaining capacity will turn red when the role is over allocated and the over allocation percentage is greater than 10%. This allows you to easily identify over allocated roles.
- The Under Allocated Threshold % parameter allows you to control when the background color turns green for the remaining capacity columns in the report. Roles that are under allocated by a percentage greater than the under allocated threshold percentage parameter will be green in the report. In the above screen capture, the under allocated threshold % parameter selected when running the report is 30%. Entering a value of 30% means that the remaining capacity will turn green when the role is under allocated and the under allocation percentage is greater than 30%. This allows you to easily identify under allocated roles.
- There is a Show Roles With No Capacity parameter that allows you to include roles that have zero capacity in the report. If the parameter is checked, then roles with zero capacity will be included in the report. If the parameter is not checked, then roles with zero capacity are not included in the report. Roles capacity is determined by the capacity of the resources that have the role as a primary role. If the resources associated to a primary role have no capacity, then the role has no capacity.
- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report demand allocation amounts. If the parameter is checked, then unstaffed roles are included in the report. If the parameter is not checked, then unstaffed roles are not included in the report.

Report Fields and Calculations:

The report displays the role name, and remaining capacity amounts by week or month and in total. Labor and equipment resources are included in the report; expense and material resources are excluded. The roles only display on the report if they are over or under allocated in at least one period displayed in the report. The roles that are not over or under allocated will not display.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The background color of the remaining capacity amounts on the report is based on the report threshold parameters. The remaining capacity field has a red background if the value is a negative number and the role is over allocated by a percentage greater than the over allocated threshold percentage entered in the over allocated threshold parameter. It has no background if the remaining capacity value is zero or it is within the bounds of the threshold parameters. The remaining capacity field has a green background if the value is a positive number and the role is under allocated by a percentage greater than the under allocated threshold percentage parameter.

Subreport Fields and Calculations:

The subreport lists resources that have the primary role drilled on from the main report and the investments to which the resources are allocated. It displays the investment name, booking status, allocation start date, allocation finish date, and capacity and allocation amounts by period and in total.

The capacity and allocation amounts are calculated the same as the main report. The start date and period type displayed in the subreport are also determined the same as in the main report.

The background color of the remaining capacity amounts on the subreport is based on the report threshold parameters. The remaining capacity field has a red background if the value is a negative number and the resource is over allocated by a percentage greater than the over allocated threshold percentage entered in the over allocated threshold parameter. It has no background if the remaining capacity value is zero or it is within the bounds of the threshold parameters. The remaining capacity field has a green background if the value is a positive number and the resource is under allocated by a percentage greater than the under allocated threshold percentage parameter.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded	inv_projects.is_template = 0	
Labor and equipment roles and resources are included.	srm_resources.resource_type <= 1	Expense and material roles and resources are excluded.
Resources only are included in demand allocation amounts, unless the Include Unstaffed Roles parameter is checked.	({?param_incl_unstaffed} = 1 OR srm_resources.person_type <> 0)	Roles are excluded from demand allocation amounts by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), and WEEKLYRESOURCEALLOCCURVE (ID=55558) are required for this report.

Over/Under Allocation by Resource

The Over/Under Allocation by Resource report displays resource remaining capacity amounts by resource. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

This report allows you to drill down to the Allocation Detail by Resource subreport, by clicking on a resource name, to see more information about the resource capacity and demand.

Over/Under Allocation by Resource

		Remaining Capacity by Month (Hours)												
Resource	**Primary Role**	**Jan-12**	**Feb-12**	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**	**Sep-12**	**Oct-12**	**Nov-12**	**Dec-12**	**Total**
Amos, Cheryl	Developer	0.00	0.00	0.00	0.00	0.00	-40.00	-60.00	-80.00	0.00	0.00	0.00	0.00	-180.00
Berry, Jason	Developer	0.00	0.00	0.00	0.00	0.00	0.00	-80.00	-40.00	0.00	0.00	0.00	0.00	-120.00
Childers, Valerie	Architect	0.00	0.00	0.00	0.00	-22.00	-24.00	32.00	-12.00	0.00	0.00	0.00	0.00	-26.00
Coleman, Joyce	Architect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-80.00	-40.00	-36.00	56.00	68.00	-32.00
Evans, Sean	Developer	0.00	0.00	0.00	0.00	0.00	-62.00	-40.00	0.00	0.00	0.00	0.00	0.00	-102.00
Gillian, Erin	Developer	-16.00	-8.00	0.00	0.00	0.00	0.00	0.00	-32.00	-40.00	-40.00	-60.00	-40.00	-236.00
Goldman, Mark	Business Analyst	0.00	0.00	0.00	0.00	0.00	0.00	16.00	-8.00	40.00	56.00	48.00	68.00	220.00
Guptka, Rakesh	Developer	0.00	0.00	160.00	8.00	82.00	-66.00	56.00	44.00	0.00	0.00	0.00	0.00	284.00
Hayes, Todd	Architect	0.00	0.00	0.00	0.00	0.00	0.00	104.00	114.00	-160.00	-184.00	-176.00	-168.00	-470.00
Hill, Wayne	Developer	0.00	-12.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	-36.00	0.00	0.00	-88.00
Johnson, Eric	Developer	0.00	0.00	0.00	0.00	0.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	1,216.00
Kelley, Art	Architect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-30.00	0.00	-32.00	-40.00	-20.00	-122.00
Krishna, Sai	Test Engineer	0.00	0.00	0.00	0.00	42.00	0.00	-50.00	-70.00	-80.00	-80.00	-90.00	-80.00	-408.00
Levert, Ed	Architect	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	-60.00	-50.00	-80.00	-230.00
Lewis, Nicole	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	-40.00	-40.00	-40.00	-160.00
Martin, Paul	Project Manager	8.00	0.00	0.00	48.00	120.00	92.00	112.00	34.00	0.00	24.00	0.00	0.00	438.00
McCarthy, John	Project Manager	0.00	20.00	-14.00	-12.00	64.00	68.00	56.00	24.00	0.00	0.00	0.00	0.00	206.00
Morris, Tom	Architect	52.00	-12.00	24.00	88.00	96.00	66.00	88.00	152.00	-40.00	-56.00	0.00	0.00	458.00
Newburg, Mary	Storage Architect	0.00	0.00	-56.00	-40.00	42.00	-34.00	-8.00	-40.00	-160.00	-184.00	-176.00	-168.00	-824.00
Olney, Pam	Business Analyst	0.00	0.00	24.00	0.00	0.00	0.00	0.00	0.00	120.00	140.00	130.00	88.00	502.00
Patel, Sanjay	Developer	48.00	0.00	-8.00	-84.00	-92.00	-84.00	-56.00	0.00	0.00	-136.00	-176.00	-168.00	-756.00
Smith, Kevin	Network Engineer	0.00	0.00	0.00	0.00	0.00	-68.00	-60.00	-60.00	0.00	0.00	0.00	0.00	-188.00
Stewart, Diane	Storage Architect	0.00	0.00	0.00	0.00	0.00	0.00	-40.00	-60.00	-50.00	0.00	0.00	0.00	-150.00
Stoneburg, Sam	Network Engineer	0.00	0.00	0.00	0.00	52.00	-84.00	-86.00	-48.00	0.00	0.00	0.00	0.00	-166.00
Turner, Bruce	Test Engineer	0.00	0.00	0.00	0.00	0.00	0.00	-10.00	-40.00	-60.00	-32.00	-98.00	-60.00	-300.00
Walker, Terry	Test Engineer	0.00	0.00	0.00	0.00	0.00	-8.00	0.00	0.00	-160.00	-184.00	-176.00	-168.00	-696.00
Grand Total		**92.00**	**-12.00**	**130.00**	**8.00**	**384.00**	**-76.00**	**150.00**	**-48.00**	**-590.00**	**-696.00**	**-672.00**	**-600.00**	**-1,930.00**

Allocation Detail by Resource Subreport

The Allocation Detail by Resource subreport displays resource capacity and demand for each investment to which the resource is allocated. The subreport displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Allocation Detail by Resource

Coleman, Joyce

	Allocation			Allocation by Month (Hours)												
Investment	**Booking**	**Start**	**Finish**	**Jan-12**	**Feb-12**	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**	**Sep-12**	**Oct-12**	**Nov-12**	**Dec-12**	**Total**
Capacity				**176.00**	**168.00**	**176.00**	**168.00**	**184.00**	**168.00**	**176.00**	**184.00**	**160.00**	**184.00**	**176.00**	**168.00**	**2,088.00**
Demand				**176.00**	**168.00**	**176.00**	**168.00**	**184.00**	**168.00**	**176.00**	**264.00**	**200.00**	**220.00**	**120.00**	**100.00**	**2,120.00**
Global Order Processing	Hard	1/1/2012	12/31/2012	88.00	84.00	88.00	84.00	92.00	126.00	132.00	138.00	120.00	140.00	80.00	80.00	1,252.00
Vacation Time	Hard	12/1/2011	12/31/2012	0.00	0.00	0.00	0.00	0.00	0.00	0.00	80.00	0.00	0.00	0.00	0.00	80.00
Web Application Enhancement	Soft	1/2/2012	12/31/2012	88.00	84.00	88.00	84.00	92.00	42.00	44.00	46.00	80.00	80.00	40.00	20.00	788.00
Remaining				**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**-80.00**	**-40.00**	**-36.00**	**56.00**	**68.00**	**-32.00**

Report Prerequisites:

- The resource must be over allocated or under allocated in at least one of the reporting periods to display on the report. Over allocated resources are resources that have investment allocation demand exceeding available capacity. Over allocated resources display negative remaining capacity on the report. Under allocated resources are resources that have investment allocation demand that is less than available capacity. Under allocated resources display positive remaining capacity on the report.
- In order to calculate remaining capacity, resource capacity and demand allocation must be included in the report. Resource capacity amounts are included if the resource has availability defined and meets the parameter criteria. Resource demand allocation amounts are included if the resource is allocated to at least one investment. Resource assignments are not required.
- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Over/Under Allocation by Resource
ID:	CSP_RES_OverUnderAllocation
Description:	Over/Under Allocation by Resource (CSP)
Executable Name:	/CSP/Over Under Allocation by Resource

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Over/Under Allocated param_over_under	Pull-down Single-select	Report (Over Allocated, Under Allocated) CSP_RPT_RES_OVER_UNDER	Yes Over and Under Allocated
Over Allocated Threshold % (0-100) param_o_threshold	Text		Yes 10
Under Allocated Threshold % (0-100) param_u_threshold	Text		Yes 30
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (Resource Manager, Booking Manager) CSP_RPT_RES_MGR_GROUP	Yes No Grouping
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Investment Status: All, Approved, Unapproved
Over/Under Allocated: Over and Under Allocated, Over Allocated Only, Under Allocated Only
Group By: No Grouping, Resource Manager, Booking Manager

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS. For the allocation demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- The Over/Under Allocated parameter allows you to filter resources depending on their allocation state. The following options are available:

Over and Under Allocated	This option includes resources over or under allocated in at least one period displayed in the report. An over allocated resource is one whose allocation exceeds available capacity. In other words, they have negative remaining capacity. An under allocated resource is one whose allocation is less than available capacity. In other words, they have positive remaining capacity.
Over Allocated Only	This option includes resources over allocated in at least one period displayed in the report. An over allocated resource is one whose allocation exceeds available capacity. In other words, they have negative remaining capacity.

Under Allocated Only	This option includes resources under allocated in at least one period displayed in the report. An under allocated resource is one whose allocation is less than available capacity. In other words, they have negative remaining capacity.

- The Over Allocated Threshold % parameter allows you to control when the background color turns red for the remaining capacity columns in the report. Resources that are over allocated by a percentage greater than the over allocated threshold percentage parameter will be red in the report. In the above screen capture, the over allocated threshold % parameter entered when running the report is 10%. Entering a value of 10% means that the remaining capacity will turn red when the resource is over allocated and the over allocation percentage is greater than 10%. This allows you to easily identify over allocated resources.
- The Under Allocated Threshold % parameter allows you to control when the background color turns green for the remaining capacity columns in the report. Resources that are under allocated by a percentage greater than the under allocated threshold percentage parameter will be green in the report. In the above screen capture, the under allocated threshold % parameter selected when running the report is 30%. Entering a value of 30% means that the remaining capacity will turn green when the resource is under allocated and the under allocation percentage is greater than 30%. This allows you to easily identify under allocated resources.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group the report so you should select this value if you do not want to do a grouping for one of the group by options.
Resource Manager	This option groups the report by resource manager.
Booking Manager	This option groups the report by the booking manager.

Report Fields and Calculations:

The report displays the resource name, primary role, and remaining capacity amounts by week or month and in total. Labor and equipment resources are included in the report; expense and material resources are excluded. The resources only display on the report if they are over or under allocated in at least one period displayed in the report. The resources that are not over or under allocated will not display.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The background color of the remaining capacity amounts on the report is based on the report threshold parameters. The remaining capacity field has a red background if the value is a negative number and the resource is over allocated by a percentage greater than the over allocated threshold percentage entered in the over allocated threshold parameter. It has no background if the remaining capacity value is zero or it is within the bounds of the threshold parameters. The remaining capacity field has a green background if the value is a positive number and the resource is under allocated by a percentage greater than the under allocated threshold percentage parameter.

Subreport Fields and Calculations:

The subreport lists the investments to which the resource is allocated and includes the investment name, booking status, allocation start date, allocation finish date, and capacity and allocation amounts by period and in total.

The capacity and allocation amounts are calculated the same as the main report. The start date and period type displayed in the subreport are also determined the same as in the main report.

The background color of the remaining capacity amounts on the subreport is based on the report threshold parameters. The remaining capacity field has a red background if the value is a negative number and the resource is over allocated by a percentage greater than the over allocated threshold percentage entered in the over allocated threshold parameter. It has no background if the remaining capacity value is zero or it is within the bounds of the threshold parameters. The remaining capacity field has a green background if the value is a positive number and the resource is under allocated by a percentage greater than the under allocated threshold percentage parameter.

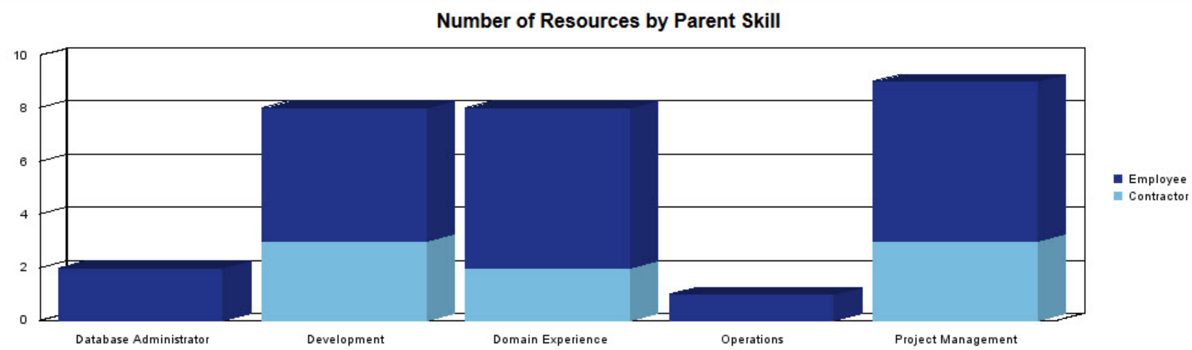
Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), and WEEKLYRESOURCEALLOCCURVE (ID=55558) are required for this report.

Resource Skills

The Resource Skills report displays the skills hierarchy, with the resources associated to skills at each level in the hierarchy. It includes the proficiency and interest rating of each resource skill. The report also includes a stacked column chart displaying the number of resources by parent skill and employment type.

Resource Skills



Resource	Primary Role	Resource Manager	Booking Manager	Employment Type	Proficiency	Interest
Database Administrator						
Gillian, Erin	Developer	Miller, Rosie	Miller, Rosie	Employee	10 - Expert	10 - High
Oracle						
Berry, Jason	Developer	Miller, Rosie	Miller, Rosie	Employee	10 - Expert	10 - High
Gillian, Erin	Developer	Miller, Rosie	Miller, Rosie	Employee	4 - Advanced	10 - High
SQL Server						
Berry, Jason	Developer	Miller, Rosie	Miller, Rosie	Employee	10 - Expert	10 - High
Gillian, Erin	Developer	Miller, Rosie	Miller, Rosie	Employee	3 - Beginner	10 - High
Development						
Berry, Jason	Developer	Miller, Rosie	Miller, Rosie	Employee	10 - Expert	10 - High
Gillian, Erin	Developer	Miller, Rosie	Miller, Rosie	Employee	10 - Expert	10 - High
Patel, Deepak	Developer	Kumar, Arun		Contractor	1 - Beginner	6 - Medium
Architectural Analytics						
Childers, Valerie	Architect	Miller, Rosie	Miller, Rosie	Employee	4 - Advanced	9 - High
Kingsley, Art	Architect	Kumar, Arun		Contractor	9 - Expert	8 - High
Levert, Ed	Architect	Kumar, Arun		Contractor	8 - Expert	4 - Medium
Patel, Deepak	Developer	Kumar, Arun		Contractor	5 - Advanced	6 - Medium
Data Modeling						
Childers, Valerie	Architect	Miller, Rosie	Miller, Rosie	Employee	7 - Advanced	7 - Medium
Kingsley, Art	Architect	Kumar, Arun		Contractor	9 - Expert	7 - Medium

Report Prerequisites:

- There must be at least one skill created (*Administration/Data Administration-Skills Hierarchy*) and the skill must be associated to at least one labor resource when running the report or the report will display a message that there are no results that match your criteria.
- The resource skills that display in the report depend on the report skills tables. These tables are populated by running the *Update Business Objects Report Tables* job with the update resource skills index option checked. The report skills tables store the relationships between resource skills and their parent skills. The job supports up to ten levels in the skills hierarchy and must be run when a skill is created, deleted, renamed, or modified in any way in the skills hierarchy (*Administration/Data Administration-Skills Hierarchy*). It does not have to be run after associating skills to resources.

Report Definition:

Name:	Resource Skills
ID:	CSP_RES_Skills
Description:	Resource Skills (CSP)
Executable Name:	/CSP/Resource Skills

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Skill param_skill	Browse Multiple-select	Browse Skills BROWSE_SKILLS	No
Interest (Greater Than or Equal To) param_interest	Pull-down Single-select	Resource Interest Level RSM_RESOURCE_INTLEV	Yes 1 - Low
Proficiency (Greater Than or Equal To) param_proficiency	Pull-down Single-select	Resource Proficiency Level RSM_RESOURCE_PROFLEV	Yes 1 - Beginner
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Sort By param_order	Pull-down Single-select	Report (Resource, Proficiency) CSP_RPT_RES_PROFICIENCY_SORT	Yes Resource
Show Graph? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Interest (Greater Than or Equal To): 1 - Low, 2 - Low, 3 - Low, 4 - Medium, 5 - Medium, 6 - Medium, 7 - Medium, 8 - High, 9 - High, 10 - High
Proficiency (Greater Than or Equal To): 1 - Beginner, 2 - Beginner, 3 - Beginner, 4 - Advanced, 5 - Advanced , 6 - Advanced , 7 - Advanced , 8 - Expert, 9 - Expert, 10 - Expert
Sort By: Resource, Proficiency

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Interest (Greater Than or Equal To) parameter allows you to control which resources display in the report, based on the interest level they have for a skill. Interest indicates how important this skill is to the resource. The three interest levels are Low, Advanced, and Expert, which can be further refined by identifying sublevels within the level. For example, a resource with an interest level of 3 - Low has more interest than one with a level of 1 - Low. The Interest (Greater Than or Equal To) parameter works as follows:

1 - Low	Resources with interest level greater than or equal to 1 - Low display in the report.
2 - Low	Resources with interest level in performing a skill greater than or equal to 2 - Low display in the report.
3 - Low	Resources with interest level in performing a skill greater than or equal to 3 - Low display in the report.
4 - Medium	Resources with interest level in performing a skill greater than or equal to 4 - Medium display in the report.
5 - Medium	Resources with interest level in performing a skill greater than or equal to 5 - Medium display in the report.
6 - Medium	Resources with interest level in performing a skill greater than or equal to 6 - Medium display in the report.
7 - Medium	Resources with interest level in performing a skill greater than or equal to 7 - Medium display in the report.
8 - High	Resources with interest level in performing a skill greater than or equal to 8 - High display in the report.
9 - High	Resources with interest level in performing a skill greater than or equal to 9 - High display in the report.
10 - High	Resources with interest level in performing a skill greater than or equal to 10 - High display in the report.

- The Proficiency (Greater Than or Equal To) parameter allows you to control which resources display in the report, based on the proficiency level they have for a skill. Proficiency indicates how well a resource performs the skill. The three proficiency levels are Beginner, Advanced, and Expert, which can be further refined by identifying sublevels within the level. For example, a resource with a proficiency level of 3 - Beginner has more expertise than one with a level of 1 – Beginner. The Proficiency (Greater Than or Equal To) parameter works as follows:

  1 - Beginner Resources with proficiency level in performing a skill greater than or equal to 1 - Beginner display in the report.

  2 - Beginner Resources with proficiency level in performing a skill greater than or equal to 2 - Beginner display in the report.

  3 - Beginner Resources with proficiency level in performing a skill greater than or equal to 3 - Beginner display in the report.

  4 - Advanced Resources with proficiency level in performing a skill greater than or equal to 4 - Advanced display in the report.

  5 - Advanced Resources with proficiency level in performing a skill greater than or equal to 5 - Advanced display in the report.

  6 - Advanced Resources with proficiency level in performing a skill greater than or equal to 6 - Advanced display in the report.

  7 - Advanced Resources with proficiency level in performing a skill greater than or equal to 7 - Advanced display in the report.

  8 - Expert Resources with proficiency level in performing a skill greater than or equal to 8 - Expert display in the report.

  9 - Expert Resources with proficiency level in performing a skill greater than or equal to 9 - Expert display in the report.

  10 - Expert Resources with proficiency level in performing a skill greater than or equal to 10 - Expert display in the report.

- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

  Resource This option sorts the report by the resource name, in ascending order, within each skill grouping.

  Proficiency This option sorts the report by the proficiency, in descending order, within each skill grouping.

- The Show Graph parameter controls whether the column chart displays in the report. If the parameter is checked, the chart will display on the first page of the report.

Report Fields and Calculations:

The report displays the resource name, primary role, resource manager, booking manager, employment type, skill proficiency, and skill interest. The report only displays labor resources because skills are only supported on labor resources. When the show graph parameter is checked, the report also includes a stacked column chart. The column chart displays the number of resources in the skills hierarchy. The columns are grouped by the top parent skills in the hierarchy. The chart also displays the split of the parent skills between employment types, providing visibility into the number of employees and contractors with each parent skill. The amounts in the chart are a summary of all the resources meeting the parameter criteria of the report.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
The resource skills that display in the report depend on the report skills tables.	INNER JOIN rpt_res_skills_flat ON rsm_skills.id = rpt_res_skills_flat.skill_id SELECT si.skill_id FROM rpt_res_skills_index si WHERE si.parent_skill_id IN {?param_skill}	The report skills tables are populated by running the *Update Business Objects Report Tables* job with the update resource skills index option checked. This job populates the resource skills tables (rpt_res_skills_index and rpt_res_skills_flat) that store relationships between resource skills and their parent skills. The job supports up to ten levels in the skills hierarchy and must be run when a skill is created, deleted, renamed, or modified in any way in the skills hierarchy (*Administration/Data Administration-Skills Hierarchy*). It does not have to be run after associating skills to resources.

Resource Skills and Remaining Capacity

The Resource Skills and Remaining Capacity report allows you to search for resources with remaining capacity and a particular skillset. The report displays resource remaining capacity amounts by resource. The report may be sorted by remaining capacity or resource and grouped by resource manager or booking manager. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

This report allows you to drill down to the Resource Skills and Remaining Capacity Detail subreport, by clicking on a resource name, to see more information about the resource capacity, demand and skills.

Resource Skills and Remaining Capacity

				Remaining Capacity by Month (Hours)									
Resource	Resource Manager	Booking Manager	Primary Role	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Total
Berry, Jason	Miller, Rosie	Miller, Rosie	Developer	56.00	84.00	60.00	24.00	96.00	88.00	144.00	128.00	136.00	816.00
Quinn, Randy	Miller, Rosie	Miller, Rosie	Network Engineer	0.00	100.00	80.00	104.00	96.00	88.00	104.00	128.00	96.00	796.00
Childers, Valerie	Miller, Rosie	Miller, Rosie	Architect	0.00	-44.50	64.00	-22.00	78.00	81.00	166.00	152.00	159.00	633.50
Roberts, Beth	Miller, Rosie	Miller, Rosie	Business Analyst	0.00	0.00	100.00	80.00	56.00	88.00	104.00	88.00	96.00	612.00
Levert, Ed	Kumar, Arun	Chasen, Nicole	Architect	0.00	0.00	8.00	28.00	22.00	55.00	68.00	55.00	62.00	298.00
Stoneburg, Sam	Miller, Rosie	Miller, Rosie	Network Engineer	0.00	0.00	84.00	42.00	-32.00	18.00	28.00	32.00	60.00	232.00
Sauer, Jason	Miller, Rosie	Miller, Rosie	Network Engineer	-17.00	-58.00	64.00	-50.00	-10.00	44.00	60.00	40.00	50.00	123.00
Walker, Terry	Miller, Rosie	Miller, Rosie	Test Engineer	-92.00	-50.00	0.00	-24.00	40.00	40.00	60.00	52.00	60.00	86.00
Hill, Wayne	Miller, Rosie	Miller, Rosie	Developer	0.00	-82.00	-84.00	-27.50	63.00	42.00	32.50	62.00	64.00	70.00
Gupta, Rakesh	Kumar, Arun	Chasen, Nicole	Developer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Patel, Deepak	Kumar, Arun	Chasen, Nicole	Developer	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Amos, Cheryl	Miller, Rosie	Miller, Rosie	Developer	30.00	13.00	-54.00	-130.00	28.00	28.00	29.00	28.00	27.00	-1.00
Kingsley, Art	Kumar, Arun	Chasen, Nicole	Architect	30.50	-98.00	128.00	13.50	-19.00	-88.00	16.00	-58.00	59.00	-16.00
Smith, Kevin	Miller, Rosie	Miller, Rosie	Network Engineer	0.00	80.00	0.00	16.00	0.00	0.00	-40.00	-40.00	-40.00	-24.00
Johnson, Eric	Kumar, Arun	Chasen, Nicole	Developer	-4.00	-120.00	0.00	14.00	16.00	18.00	15.00	13.00	16.00	-32.00
Sampson, Mike	Kumar, Arun	Chasen, Nicole	Test Engineer	22.00	-63.00	-21.00	-76.00	28.00	-30.00	-64.00	-26.00	116.00	-114.00
Lewis, Dana	Miller, Rosie	Miller, Rosie	Business Analyst	0.00	0.00	0.00	-6.00	-14.00	-12.00	-46.00	-20.00	-20.00	-118.00
Morris, Tom	Miller, Rosie	Miller, Rosie	Architect	0.00	0.00	0.00	0.00	0.00	-40.00	-40.00	-40.00	0.00	-120.00
Turner, Bruce	Miller, Rosie	Miller, Rosie	Test Engineer	0.00	0.00	160.00	-42.00	-80.00	-80.00	-20.00	-36.00	-28.00	-126.00
Newburg, Mary	Kumar, Arun	Chasen, Nicole	Storage Architect	0.00	0.00	-80.00	-40.00	-10.00	-20.00	-10.00	-10.00	-10.00	-180.00
Stewart, Diane	Miller, Rosie	Miller, Rosie	Storage Architect	0.00	0.00	-56.00	-80.00	0.00	0.00	-40.00	-40.00	-40.00	-256.00
Murphy, Carolyn	Miller, Rosie	Miller, Rosie	Developer	0.00	44.00	-80.00	-88.00	-40.00	-40.00	-32.00	-32.00	-24.00	-292.00

Resource Skills and Remaining Capacity Detail Subreport

The Resource Skills and Remaining Capacity Detail subreport displays resource capacity and demand for each investment to which the resource is allocated. It also displays all the skills associated to the resource, along with the proficiency and interest levels. The subreport displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Resource Skills and Remaining Capacity Detail

Berry, Jason

	Allocation			Allocation by Month (Hours)									
Investment	Booking	Start	Finish	Apr-13	May-13	Jun-13	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Total
Capacity				**176.00**	**184.00**	**160.00**	**184.00**	**176.00**	**168.00**	**184.00**	**168.00**	**176.00**	**1,576.00**
Demand				**120.00**	**100.00**	**100.00**	**160.00**	**80.00**	**80.00**	**40.00**	**40.00**	**40.00**	**760.00**
Automated Security Enhancements	Soft	1/1/2013	9/16/2013	40.00	40.00	40.00	20.00	40.00	40.00	0.00	0.00	0.00	220.00
CRM Enhancements	Soft	2/28/2013	7/29/2013	40.00	20.00	20.00	20.00	0.00	0.00	0.00	0.00	0.00	100.00
Vacation Time	Soft	1/1/2013	1/30/2014	0.00	0.00	0.00	80.00	0.00	0.00	0.00	0.00	0.00	80.00
Web Application Enhancement	Soft	1/1/2013	12/31/2013	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00	360.00
Remaining				**56.00**	**84.00**	**60.00**	**24.00**	**96.00**	**88.00**	**144.00**	**128.00**	**136.00**	**816.00**

Parent Skill	Skill	Description	Proficiency	Interest
	Development	Software development work experience	1 - Beginner	1 - Low
Database Administrator	Oracle	Working knowledge of the Oracle database and supporting tools	10 - Expert	10 - High
Database Administrator	SQL Server	Working knowledge of the SQL Server database and supporting tools	6 - Advanced	3 - Low
Development	HTML	HTML programming experience	9 - Expert	9 - High
Development	J2EE	J2EE programming experience	8 - Expert	8 - High
Development	WebUI	Web UI development experience	7 - Advanced	6 - Medium

Report Prerequisites:

- In order to calculate remaining capacity, resource capacity and demand allocation must be included in the report. Resource capacity amounts are included if the resource has availability defined and meets the parameter criteria. Resource demand allocation amounts are included if the resource is allocated to at least one investment. Resource assignments are not required.
- The capacity amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The demand amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.
- The report includes a skills parameter that allows you to search for resources with remaining capacity and a particular skillset. In order to leverage this capability, there must be skills created (*Administration/Data Administration-Skills Hierarchy*) and the skills must be associated to labor resources.

Report Definition:

Name:	Resource Skills and Remaining Capacity
ID:	CSP_RES_SkillsRemCapacity
Description:	Resource Skills and Remaining Capacity (CSP)
Executable Name:	/CSP/Resource Skills and Remaining Capacity

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Skill param_skill	Browse Multiple-select	Browse Skills BROWSE_SKILLS	No
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Over Allocated Threshold % (0-100) param_o_threshold	Text		Yes 10
Under Allocated Threshold % (0-100) param_u_threshold	Text		Yes 30
Show Under Allocated Only? param_under	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Sort By param_sort	Pull-down Single-select	Report (Remaining Capacity, Resource) CSP_RPT_RES_CAPACITY_SORT	Yes Remaining Capacity
Group By param_group	Pull-down Single-select	Report (Resource Manager, Booking Manager) CSP_RPT_RES_MGR_GROUP	Yes No Grouping

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Investment Status: All, Approved, Unapproved
Sort By: Resource, Remaining Capacity
Group By: No Grouping, Resource Manager, Booking Manager

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- For the capacity amounts, the resource OBS parameter filters resources based on their OBS. For the allocation demand amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources based on their OBS.
- The Skill parameter allows you to search for resources with remaining capacity and a particular skillset. If a resource has at least one skill selected in the parameter, then the resource will display in the report. However, the subreport displays all of the resource's skills regardless of the skills selected in the parameter. This allows you to search for a particular skillset, but get visibility into all of the resource's skills.
- The Start Date parameter determines the first time period that displays in the report. There are a total of nine periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays nine weeks.
Month	The report displays nine months.

- The Over Allocated Threshold % parameter allows you to control when the background color turns red for the remaining capacity columns in the report. Resources that are over allocated by a percentage greater than the over allocated threshold percentage parameter will be red in the report. In the above screen capture, the over allocated threshold % parameter entered when running the report is 10%. Entering a value of 10% means that the remaining capacity will turn red when the resource is over allocated and the over allocation percentage is greater than 10%. This allows you to easily identify over allocated resources.

- The Under Allocated Threshold % parameter allows you to control when the background color turns green for the remaining capacity columns in the report. Resources that are under allocated by a percentage greater than the under allocated threshold percentage parameter will be green in the report. In the above screen capture, the under allocated threshold % parameter selected when running the report is 30%. Entering a value of 30% means that the remaining capacity will turn green when the resource is under allocated and the under allocation percentage is greater than 30%. This allows you to easily identify under allocated resources.
- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

  Remaining Capacity This option sorts the report by the total remaining capacity in descending order.

  Resource This option sorts the report by the resource name in ascending order.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

  No Grouping This option does not group the report so you should select this value if you do not want to do a grouping for one of the group by options.

  Resource Manager This option groups the report by resource manager.
  Booking Manager This option groups the report by the booking manager.
- There is a Show Under Allocated Only parameter that allows you to only display resources that are under allocated in at least one period displayed in the report. If the parameter is checked, then only under allocated resources will be displayed in the report. If the parameter is not checked, then all resources meeting the parameter criteria are displayed in the report. An under allocated resource is one whose allocation is less than available capacity. In other words, they have negative remaining capacity.

Report Fields and Calculations:
If the report is not grouped, then the report displays the following columns: resource name, resource manager, booking manager, primary role, and remaining capacity amounts by week or month. If the report is grouped by resource manager, then the report displays the following columns: resource name, booking manager, primary role, and remaining capacity amounts by week or month. If the report is grouped by booking manager, then the report displays the following columns: resource name, resource manager, primary role, and remaining capacity amounts by week or month. Labor and equipment resources are included in the report; expense and material resources are excluded.

The report displays nine periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The background color of the remaining capacity amounts on the report is based on the report threshold parameters. The remaining capacity field has a red background if the value is a negative number and the resource is over allocated by a percentage greater than the over allocated threshold percentage entered in the over allocated threshold parameter. It has no background if the remaining capacity value is zero or it is within the bounds of the threshold parameters. The remaining capacity field has a green background if the value is a positive number and the resource is under allocated by a percentage greater than the under allocated threshold percentage parameter.

Subreport Fields and Calculations:
The subreport lists the investments to which the resource is allocated and includes the investment name, booking status, allocation start date, allocation finish date, and capacity and allocation amounts by period and in total. The capacity and allocation amounts are calculated the same as the main report. The start date and period type displayed in the subreport are also determined the same as in the main report.

The background color of the remaining capacity amounts on the subreport is based on the report threshold parameters. The remaining capacity field has a red background if the value is a negative number and the resource is over allocated by a percentage greater than the over allocated threshold percentage entered in the over allocated threshold parameter. It has no background if the remaining capacity value is zero or it is within the bounds of the threshold parameters. The remaining capacity field has a green background if the value is a positive number and the resource is under allocated by a percentage greater than the under allocated threshold percentage parameter.

The report also displays the parent skill, skill, description, proficiency, and interest of all skills associated to the resource. It does not limit the skills to include only those selected in the Skill parameter; the subreport always displays all of the resource's skills. The Skill parameter applies only to the main report.

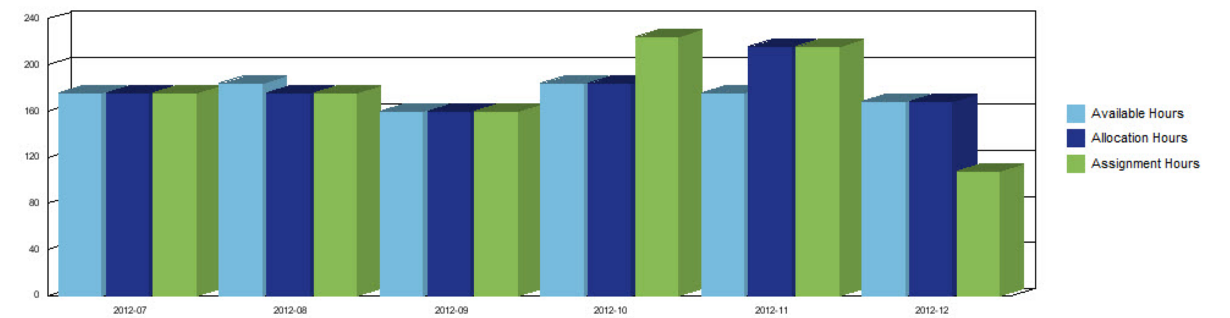
Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), and WEEKLYRESOURCEALLOCCURVE (ID=55558) are required for this report.

Resource Forecasted Utilization

The Resource Forecasted Utilization report displays availability, allocation, and assignment amounts by resource across time periods. The chart shows these amounts per period. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs. This report also allows you to drill down to the Resource Forecasted Utilization Detail subreport, by clicking on a period, to view amounts allocated to investments and assigned to tasks.

Resource Forecasted Utilization



Resource	Resource Manager	Primary Role	Employment Type	Month	Available Hours	Allocations			Assignments		
						Hours	Remaining	%	Hours	Remaining	%
Lewis, Dana	Miller, Rosie	Developer	Employee	Jul-2012	176.00	176.00	0.00	100.00	176.00	0.00	100.00
				Aug-2012	184.00	176.00	8.00	95.65	176.00	8.00	95.65
				Sep-2012	160.00	160.00	0.00	100.00	160.00	0.00	100.00
				Oct-2012	184.00	184.00	0.00	100.00	224.00	-40.00	121.74
				Nov-2012	176.00	216.00	-40.00	122.73	216.00	-40.00	122.73
				Dec-2012	168.00	168.00	0.00	100.00	108.00	60.00	64.29
				Total	**1,048.00**	**1,080.00**	**-32.00**	**103.05**	**1,060.00**	**-12.00**	**101.15**

Resource Forecasted Utilization Detail Subreport

The Resource Forecasted Utilization Detail subreport displays availability, allocation, and assignment amounts by investment and task, for a specific resource and time period. The amounts may be displayed as hours or FTEs.

Resource Forecasted Utilization Detail

Investment / Task	Charge Code	Available Hours	Allocations		Assignments	
			Hours	%	Hours	%
Lewis, Dana						
Month: Nov-2012		176.00				
Mobile Commerce	Capital		86.00	48.86	**86.00**	**48.86**
User Interface Development	Capital				86.00	48.86
Online Order Catalog	Expense		86.00	48.86	**86.00**	**48.86**
Web Portal Integration	Expense				86.00	48.86
PM Activities (Non-Project)	Expense		4.00	2.27	4.00	2.27
Vacation Time	Expense		40.00	22.73	40.00	22.73
Total		**176.00**	**216.00**	**122.73**	**216.00**	**122.73**

Report Prerequisites:

- Resource available amounts display if the resource has availability defined and meets the parameter criteria. Available amounts do not display for roles.
- Resource allocation amounts display if the resource or role is allocated to at least one investment team during the reporting period selected to display in the report.
- Resource assignment amounts display if the resource or role is assigned to at least one investment during the reporting period selected to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The availability amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- For allocations, the amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- For assignments, the amounts are calculated based on the time slices with the name MONTHLYRESOURCEACTCURVE and WEEKLYRESOURCEACTCURVE; and MONTHLYRESOURCEESTCURVE and WEEKLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Resource Forecasted Utilization
ID:	CSP_RES_ForecastedUtilization
Description:	Resource Forecasted Utilization (CSP)
Executable Name:	/CSP/Resource Forecasted Utilization

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Start Date param_start_date	Relative Date		Yes Start of Current Month
End Date param_end_date	Relative Date		Yes End of Current Year
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Include Unstaffed Roles? param_incl_role	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Show Graph? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Investment Status: All, Approved, Unapproved

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources or roles display in the report. When you select an OBS unit in this parameter, the report will display the resources or roles attached to the OBS unit you select and the resources or roles attached to any OBS units that are descendent units of the OBS unit you select.
- For the availability amounts, the resource OBS parameter filters resources based on their OBS. For the allocation and assignment amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources or roles based on their OBS.
- The Start Date and End Date parameters allow you to control the months or weeks that display in the report. The start date entered determines the first month or week of data included in the report as well as the first month or week displayed in the chart. The end date determines the month or week thru which data is included in the report and it is the last month or week displayed in the chart.
- The Period Type parameter allows you to change the type of time periods that display in the report. This parameter works in conjunction with the start date and end date parameters to determine the periods that display on the report.

Week	The report displays weeks.
Month	The report displays months.

- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report. If the parameter is checked, then roles will be included in the report. If the parameter is not checked, then roles are not included in the report.
- The Show Graph parameter controls whether the column chart displays in the report. If the parameter is checked, the chart will display at the top of each resource section in the report. If the parameter is not checked, the chart will not display.

Report Fields and Calculations:
The report displays the resource or role name, resource manager, primary role, employment type, period, available amount, allocation amount, allocation remaining amount, allocation %, assignment amount, assignment remaining amount, and assignment %. The amounts and percentages are displayed by period and in total. Labor and equipment resources or roles are included in the report; expense and material resources or roles are excluded.

The report displays periods starting with the period entered in the start date parameter and ending with the period entered in the end date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The allocation remaining and assignment remaining fields in the report have a red background if the value is a negative number and no background if the value is zero or a positive number.

This report contains the following calculations:

Allocation %	The allocation % field is the percentage of availability that is allocated to investments. **Formula:** (Allocation Amount / Available Amount) * 100
Assignment %	The assignment % field is the percentage of availability that is assigned to tasks. For non-project investments, the assignment % calculates to be the same as the allocation %. **Formula:** (Assignment Amount / Available Amount) * 100

Subreport Fields and Calculations:
The subreport is for one resource and time period and it displays the investment name, task name, charge code, available amount, allocation amount, allocation %, assignment amount, and assignment %. The assignment amount and % are in bold font at the investment level because they are calculated based on the tasks belonging to the investment. This report contains the following calculations:

Allocation %	The allocation % field is the percentage of availability that is allocated to investments. **Allocation % background color is determined as follows:** Red — The allocation amount exceeds the available amount. The allocation % exceeds 100%. **Formula:** (Allocation Amount / Available Amount) * 100
Assignment %	The assignment % field is the percentage of availability that is assigned to tasks. For non-project investments, the assignment % calculates to be the same as the allocation %. **Assignment % background color is determined as follows:** Red — The assignment amount exceeds the available amount. The assignment % exceeds 100%. **Formula:** (Assignment Amount / Available Amount) * 100

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included, unless the Include Unstaffed Roles parameter is checked.	({?param_incl_role} = 1 OR ({?param_incl_role} = 0 AND r.person_type <> 0))	Roles are excluded by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources or roles are included.	srm_resources.resource_type <= 1	Expense and material resources or roles are excluded.

Topic	Database Statement	Additional Explanation
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report rows is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END (prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 5 ELSE 55557 END OR prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END)	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEESTCURVE (ID=5), WEEKLYRESOURCEESTCURVE (ID=55557), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Resource Forecasted Utilization Detail

The Resource Forecasted Utilization Detail report displays availability, allocation, and assignment amounts by investment and task. It is grouped by resource and time period. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Resource Forecasted Utilization Detail

Investment / Task	Charge Code	Available Hours	Allocations		Assignments	
			Hours	%	Hours	%
Lewis, Dana						
Month: Sep-2012		160.00				
Mobile Commerce	Capital		78.00	48.75	**78.00**	**48.75**
Database Development	Capital				39.00	24.38
User Interface Development	Capital				39.00	24.38
Mobile Security	Capital		78.00	48.75	**78.00**	**48.75**
Encrypting Data at Rest	Capital				78.00	48.75
PM Activities (Non-Project)	Expense		4.00	2.50	4.00	2.50
Total		**160.00**	**160.00**	**100.00**	**160.00**	**100.00**
Month: Oct-2012		184.00				
Mobile Commerce	Capital		110.00	59.78	**150.00**	**81.52**
User Interface Development	Capital				80.00	43.48
Unit and Performance Testing	Capital				70.00	38.04
Mobile Security	Capital		70.00	38.04	**70.00**	**38.04**
Encrypting Data at Rest	Capital				70.00	38.04
PM Activities (Non-Project)	Expense		4.00	2.17	4.00	2.17
Total		**184.00**	**184.00**	**100.00**	**224.00**	**121.74**
Month: Nov-2012		176.00				
Mobile Commerce	Capital		86.00	48.86	**86.00**	**48.86**
User Interface Development	Capital				86.00	48.86
Online Order Catalog	Expense		86.00	48.86	**86.00**	**48.86**
Web Portal Integration	Expense				86.00	48.86
PM Activities (Non-Project)	Expense		4.00	2.27	4.00	2.27
Vacation Time	Expense		40.00	22.73	40.00	22.73
Total		**176.00**	**216.00**	**122.73**	**216.00**	**122.73**
Month: Dec-2012		168.00				
Mobile Commerce	Capital		64.00	38.10	**64.00**	**38.10**
User Interface Development	Capital				64.00	38.10
Online Order Catalog	Expense		100.00	59.52	**40.00**	**23.81**
Web Portal Integration	Expense				40.00	23.81
PM Activities (Non-Project)	Expense		4.00	2.38	4.00	2.38
Total		**168.00**	**168.00**	**100.00**	**108.00**	**64.29**
Grand Total		**688.00**	**728.00**	**105.81**	**708.00**	**102.91**

Report Prerequisites:

- Resource available amounts display if the resource has availability defined and meets the parameter criteria. Available amounts do not display for roles.
- Resource allocation amounts display if the resource or role is allocated to at least one investment team during the reporting period selected to display in the report.
- Resource assignment amounts display if the resource or role is assigned to at least one investment during the reporting period selected to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The availability amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- For allocations, the amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- For assignments, the amounts are calculated based on the time slices with the name MONTHLYRESOURCEACTCURVE and WEEKLYRESOURCEACTCURVE; and MONTHLYRESOURCEESTCURVE and WEEKLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Resource Forecasted Utilization Detail
ID:	CSP_RES_ForecastedUtilDetail
Description:	Resource Forecasted Utilization Detail (CSP)
Executable Name:	/CSP/Resource Forecasted Utilization Detail

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Start Date param_start_date	Relative Date		Yes Start of Current Month
End Date param_end_date	Relative Date		Yes End of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Show Tasks? param_summarize	Checkbox		No Checked
Include Unstaffed Roles? param_incl_role	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Investment Status: All, Approved, Unapproved

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources or roles display in the report. When you select an OBS unit in this parameter, the report will display the resources or roles attached to the OBS unit you select and the resources or roles attached to any OBS units that are descendent units of the OBS unit you select.
- For the availability amounts, the resource OBS parameter filters resources based on their OBS. For the allocation and assignment amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources or roles based on their OBS.
- The Start Date and End Date parameters allow you to control the months or weeks that display in the report. The start date entered determines the first month or week of data included in the report. The end date determines the month or week thru which data is included in the report.
- The Period Type parameter allows you to change the type of time periods that display in the report. This parameter works in conjunction with the start date and end date parameters to determine the periods that display on the report.

Week	The report displays weeks.
Month	The report displays months.

- The Show Tasks parameter controls whether tasks display under investments in the report. If the parameter is checked, the tasks with resource assignments will display for each investment. If the parameter is not checked, the tasks will not display.
- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report. If the parameter is checked, then roles will be included in the report. If the parameter is not checked, then roles are not included in the report.

Report Fields and Calculations:
The report is grouped by resource or role and time period and it displays the following columns: investment name, task name, charge code, available amount, allocation amount, allocation %, assignment amount, and assignment %. The assignment amount and % are in bold font at the investment level because they are calculated based on the tasks belonging to the investment. Labor and equipment resources or roles are included in the report; expense and material resources or roles are excluded.

The report displays periods starting with the period entered in the start date parameter and ending with the period entered in the end date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

The allocation % and assignment % fields in the report have a red background if the value is greater than 100% and no background if the value is less than or equal to 100 %.

This report contains the following calculations:

Allocation %	The allocation % field is the percentage of availability that is allocated to investments. **Allocation % background color is determined as follows:** Red — The allocation amount exceeds the available amount. The allocation % exceeds 100%. **Formula:** (Allocation Amount / Available Amount) * 100
Assignment %	The assignment % field is the percentage of availability that is assigned to tasks. For non-project investments, the assignment % calculates to be the same as the allocation %. **Assignment % background color is determined as follows:** Red — The assignment amount exceeds the available amount. The assignment % exceeds 100%. **Formula:** (Assignment Amount / Available Amount) * 100

Report Security and Technical Details:
Security is determined by resource view rights.

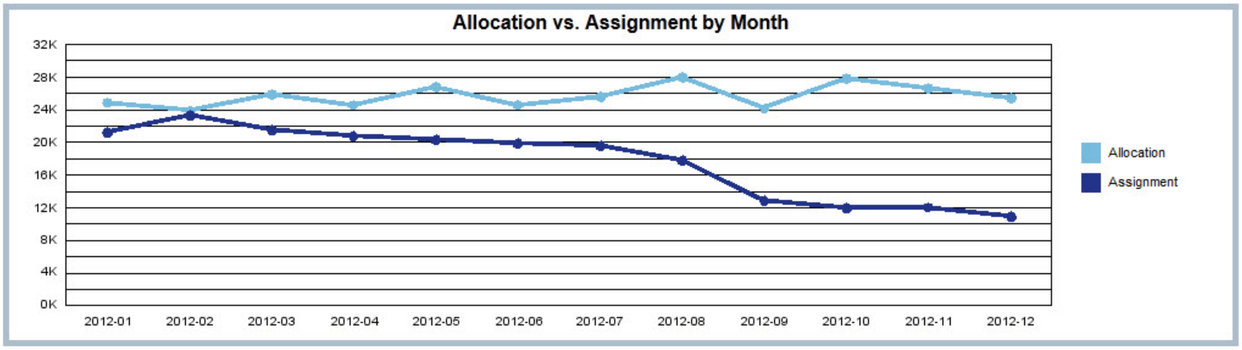
Topic	Database Statement	Additional Explanation
Resources only are included, unless the Include Unstaffed Roles parameter is checked.	({?param_incl_role} = 1 OR ({?param_incl_role} = 0 AND r.person_type <> 0))	Roles are excluded by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources or roles are included.	srm_resources.resource_type <= 1	Expense and material resources or roles are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.

Topic	Database Statement	Additional Explanation
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END (prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 5 ELSE 55557 END OR prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END)	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7), WEEKLYRESOURCEAVAILCURVE (ID=55559), MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEESTCURVE (ID=5), WEEKLYRESOURCEESTCURVE (ID=55557), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Resource Allocations and Assignments

The Resource Allocations and Assignments report displays investment allocation, assignment, and variance amounts by resource across time periods. The chart shows allocation versus assignment amounts by period. The report may also be run to show allocations only or assignments only. This report displays amounts by week or month, and in total, for each investment and resource. The amounts may be displayed as hours or FTEs.

Resource Allocations and Assignments



Investment		Amounts by Month (Hours)												
		Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12	Sep-12	Oct-12	Nov-12	Dec-12	Total
Berks, Paul														
Client Services Application	Allocation	44.00	42.00	44.00	42.00	46.00	42.00	44.00	46.00	40.00	46.00	44.00	42.00	522.00
	Assignment	44.00	40.00	44.00	42.00	46.00	42.00	44.00	46.00	40.00	0.00	0.00	0.00	388.00
	Variance	0.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	46.00	44.00	42.00	134.00
Global Expense Application	Allocation	44.00	42.00	44.00	42.00	46.00	42.00	44.00	46.00	40.00	46.00	44.00	42.00	522.00
	Assignment	44.00	42.00	44.00	42.00	46.00	58.00	44.00	46.00	40.00	46.00	44.00	42.00	538.00
	Variance	0.00	0.00	0.00	0.00	0.00	-16.00	0.00	0.00	0.00	0.00	0.00	0.00	-16.00
Mobile Security	Allocation	88.00	84.00	88.00	84.00	92.00	84.00	0.00	0.00	0.00	0.00	0.00	0.00	520.00
	Assignment	88.00	84.00	88.00	84.00	92.00	84.00	0.00	0.00	0.00	0.00	0.00	0.00	520.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Web Application Enhancement	Allocation	0.00	0.00	0.00	0.00	0.00	0.00	88.00	92.00	80.00	92.00	88.00	84.00	524.00
	Assignment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	88.00	92.00	80.00	92.00	88.00	84.00	524.00
Total	**Allocation**	**176.00**	**168.00**	**176.00**	**168.00**	**184.00**	**168.00**	**176.00**	**184.00**	**160.00**	**184.00**	**176.00**	**168.00**	**2,088.00**
	Assignment	**176.00**	**166.00**	**176.00**	**168.00**	**184.00**	**184.00**	**88.00**	**92.00**	**80.00**	**46.00**	**44.00**	**42.00**	**1,446.00**
	Variance	**0.00**	**2.00**	**0.00**	**0.00**	**0.00**	**-16.00**	**88.00**	**92.00**	**80.00**	**138.00**	**132.00**	**126.00**	**642.00**
Berry, Jason														
Automated Security Enhancements	Allocation	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
	Assignment	176.00	168.00	176.00	168.00	184.00	168.00	176.00	144.00	200.00	184.00	176.00	168.00	2,088.00
	Variance	0.00	0.00	0.00	0.00	0.00	0.00	0.00	40.00	-40.00	0.00	0.00	0.00	0.00

Report Prerequisites:

- The resource or role must be allocated to at least one investment team in order for the resource, investment, and team member allocations to display in the report.
- The resource or role must be assigned to at least one investment task in order for the investment assignments to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The allocation amounts are calculated based on the time slices with the name MONTHLYRESOURCEALLOCCURVE and WEEKLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The assignment amounts are calculated based on the time slices with the name MONTHLYRESOURCEACTCURVE and WEEKLYRESOURCEACTCURVE; and MONTHLYRESOURCEESTCURVE and WEEKLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.
- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Resource Allocations and Assignments
ID:	CSP_RES_AllocationAssignment
Description:	Resource Allocations and Assignments (CSP)
Executable Name:	/CSP/Resource Allocations and Assignments

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Type of Hours param_hours_type	Pull-down Single-select	Report (Allocated and Assigned, Allocated, Assigned) CSP_RPT_RES_ALLOC_ASSIGN	Yes Allocated and Assigned
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Include Unstaffed Roles? param_include_roles	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Show Graph? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Period Type: Week, Month
Unit Type: FTE, Hours
Type of Hours: Allocated and Assigned, Allocated, Assigned
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources or roles display in the report. When you select an OBS unit in this parameter, the report will display the resources or roles attached to the OBS unit you select and the resources or roles attached to any OBS units that are descendent units of the OBS unit you select.
- For the allocation and assignment amounts, the resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources or roles based on their OBS.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- The Type of Hours parameter allows you to determine which amounts display in the report. The following options are available:

Allocated and Assigned	The report displays allocation, assignment, and variance amounts in the body of the report. It displays allocation and assignment amounts in the line chart.
Allocated	The report displays allocation amounts in the body of the report and the line chart.
Assigned	The report displays assignment amounts in the body of the report and the line chart.

- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report. If the parameter is checked, then roles will be included in the report. If the parameter is not checked, then roles are not included in the report.
- The Show Graph parameter controls whether the Allocation vs. Assignment by Period chart displays on the report. If the parameter is checked, the chart will display at the top of the report. If the parameter is not checked, the chart will not display.

Report Fields and Calculations:

The report displays the investment name with allocation, assignment, and variance amounts by period and in total, grouped by resource or role. The report also includes a line chart showing allocation versus assignments, in hours or FTEs, by month or week. Labor and equipment resources or roles are included in the report; expense and material resources or roles are excluded.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

This report contains the following calculation:

Variance	The variance field is the difference between the allocation and assignment amounts. **Variance background color is determined as follows:** Red The assignment amount exceeds the allocation amount. **Formula:** Allocation - Assignment

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Resources only are included, unless the Include Unstaffed Roles parameter is checked.	({?param_include_roles} = 1 OR ({?param_include_roles} = 0 AND r.person_type <> 0))	Roles are excluded by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources and roles are included.	srm_resources.resource_type <= 1	Expense and material resources and roles are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 6 ELSE 55558 END (prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 5 ELSE 55557 END OR prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 4 ELSE 55556 END)	MONTHLYRESOURCEALLOCCURVE (ID=6), WEEKLYRESOURCEALLOCCURVE (ID=55558), MONTHLYRESOURCEESTCURVE (ID=5), WEEKLYRESOURCEESTCURVE (ID=55557), MONTHLYRESOURCEACTCURVE (ID=4), and WEEKLYRESOURCEACTCURVE (ID=55556) are required for this report.

Resource Assignments by Task

The Resource Assignments by Task report displays actual and estimate effort amounts for investment task assignments, by resource. The report displays amounts by investment task assignment, and in total, for each resource. The report also displays task status and % complete information, as well as assignment start and finish dates.

Resource Assignments by Task

Investment	Task	Status	% Complete	Assignment					
				Role	Start	Finish	Actuals	ETC	EAC
Childers, Valerie									
Online Order Catalog	Database Development	Completed	100.00	Architect	1/2/2012	1/6/2012	80.00	0.00	80.00
Online Order Entry	Portal Development	Not Started	0.00	Architect	4/9/2012	6/5/2012	0.00	320.00	320.00
Online Order Entry	Knowledge Transfer	Not Started	0.00	Architect	6/6/2012	6/15/2012	0.00	40.00	40.00
Total							**80.00**	**360.00**	**440.00**
Lewis, Dana									
Mobile Commerce	Database Development	Not Started	0.00	Developer	9/3/2012	9/28/2012	0.00	39.00	39.00
Mobile Commerce	User Interface Development	Not Started	0.00	Developer	9/3/2012	12/31/2012	0.00	269.00	269.00
Total							**0.00**	**308.00**	**308.00**
McCarthy, John									
Online Order Entry	Identify Infrastructure Requirements	Started	50.00	Project Manager	1/2/2012	2/20/2012	160.00	20.00	180.00
Online Order Entry	Functional and Technical Design	Started	25.00	Project Manager	2/13/2012	2/29/2012	0.00	80.00	80.00
Online Order Entry	User Interface Design	Started	10.00	Project Manager	2/13/2012	3/16/2012	40.00	150.00	190.00
Online Order Entry	Online Training Development	Not Started	0.00	Project Manager	6/18/2012	7/6/2012	0.00	120.00	120.00
Total							**200.00**	**370.00**	**570.00**
Murphy, Carolyn									
Online Order Catalog	Database Development	Completed	100.00	Developer	2/13/2012	2/17/2012	40.00	0.00	40.00
Online Order Entry	Portal Development	Not Started	0.00	Developer	4/9/2012	6/5/2012	0.00	320.00	320.00
Total							**40.00**	**320.00**	**360.00**
Parker, Ashley									
Online Order Entry	Identify Infrastructure Requirements	Started	50.00	Business Analyst	1/2/2012	2/20/2012	80.00	100.00	180.00
Online Order Entry	Functional and Technical Design	Started	25.00	Business Analyst	2/13/2012	2/17/2012	40.00	0.00	40.00
Online Order Entry	User Interface Design	Started	10.00	Business Analyst	2/13/2012	3/16/2012	0.00	200.00	200.00
Online Order Entry	Knowledge Transfer	Not Started	0.00	Business Analyst	6/6/2012	6/15/2012	0.00	40.00	40.00
Online Order Entry	Online Training Development	Not Started	0.00	Business Analyst	6/18/2012	7/6/2012	0.00	120.00	120.00
Total							**120.00**	**460.00**	**580.00**
Grand Total							**440.00**	**1,818.00**	**2,258.00**

Report Prerequisites:

- The resource or role must be assigned to at least one investment task in order for the resource to display in the report. For projects, the resource or role must be assigned to a task in the Gantt unless the project has an effort task with resources or roles automatically assigned. For investments other than the project, resources or roles added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

Report Definition:

Name:	Resource Assignments by Task
ID:	CSP_RES_AssignmentsByTask
Description:	Resource Assignments by Task (CSP)
Executable Name:	/CSP/Resource Assignments by Task

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Booking Status param_booking	Pull-down Single-select	Booking Status BOOKING_STATUS_LIST	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Task Start Date param_date	Relative Date		No
Include Completed Tasks? param_closed_tasks	Checkbox		No Unchecked
Include Unstaffed Roles? param_include_roles	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Booking Status: Hard, Mixed, Soft
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources or roles display in the report. When you select an OBS unit in this parameter, the report will display the resources or roles attached to the OBS unit you select and the resources or roles attached to any OBS units that are descendent units of the OBS unit you select.
- The resource OBS parameter filters investment team members based on their staff OBS. If the staff OBS is not completed for the team members, then it filters the resources or roles based on their OBS.
- The Task Start Date parameter determines the start date of the tasks that display in the report. If a date is entered, the report will include tasks with date equals to or greater than the date entered. If no date is entered, the report will include all tasks.
- There is an Include Completed Tasks parameter that allows you to control which tasks display in the report. If the parameter is checked, the report includes tasks with all statuses, including 'Completed'. If the parameter is not checked, then it only includes tasks with a status of 'Not Started' and 'Started'.
- There is an Include Unstaffed Roles parameter that allows you to include roles, which have not been staffed with resources, in the report. If the parameter is checked, then roles will be included in the report. If the parameter is not checked, then roles are not included in the report.

Report Fields and Calculations:
The report displays the investment name, task name, status, % complete, assignment role, assignment start date, assignment finish date, actuals, ETC, and EAC amounts by task and in total for each resource. If the assignment role is blank, then the team role displays. If the team role is blank, then the resource's primary role displays. Labor and equipment resources or roles are included in the report; expense and material resources or roles are excluded.

This report contains the following calculation:

EAC	The EAC field is the sum of the ETC and actual amounts. **Formula:** ETC + Actual

Report Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
Not Started and Started tasks only are included, unless the Include Completed Tasks parameter is checked.	({?param_closed_tasks} = 1 OR ({?param_closed_tasks} = 0 AND t.prStatus <> 2))	Completed tasks are excluded by default. Completed tasks are included if the Include Completed Tasks parameter is checked.
Resources only are included, unless the Include Unstaffed Roles parameter is checked.	({?param_include_roles} = 1 OR ({?param_include_roles} = 0 AND r.person_type <> 0))	Roles are excluded by default. Roles are included if the Include Unstaffed Roles parameter is checked.
Labor and equipment resources or roles are included.	srm_resources.resource_type <= 1	Expense and material resources or roles are excluded.

Resource Availability

The Resource Availability report displays available capacity amounts by resource. The report may be grouped by resource manager or primary role. The report displays amounts by week or month, and in total. The amounts may be displayed as hours or FTEs.

Resource Availability

		Availability by Month (Hours)												
Resource	**Resource Manager**	**Jan-12**	**Feb-12**	**Mar-12**	**Apr-12**	**May-12**	**Jun-12**	**Jul-12**	**Aug-12**	**Sep-12**	**Oct-12**	**Nov-12**	**Dec-12**	**Total**
Architect														
Childers, Valerie	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Coleman, Joyce	Miller, Rosie	176.00	168.00	176.00	88.00	184.00	168.00	96.00	184.00	160.00	184.00	176.00	168.00	1,928.00
Hayes, Todd	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	128.00	152.00	168.00	136.00	184.00	176.00	168.00	1,984.00
Levert, Ed	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Morris, Tom	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Total		**880.00**	**840.00**	**880.00**	**760.00**	**920.00**	**800.00**	**776.00**	**904.00**	**776.00**	**920.00**	**880.00**	**840.00**	**10,176.00**
Developer														
Amos, Cheryl	Miller, Rosie	176.00	168.00	96.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,008.00
Berry, Jason	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Evans, Sean	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Gillian, Erin	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	160.00	168.00	136.00	168.00	176.00	168.00	2,016.00
Guptka, Rakesh	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Hill, Wayne	Miller, Rosie	152.00	152.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,048.00
Johnson, Eric	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Murphy, Carolyn	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Patel, Sanjay	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Preston, Sarah	Lewis, Dana	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Total		**1,736.00**	**1,664.00**	**1,680.00**	**1,680.00**	**1,840.00**	**1,680.00**	**1,744.00**	**1,824.00**	**1,576.00**	**1,824.00**	**1,760.00**	**1,680.00**	**20,688.00**
Network Engineer														
Quinn, Randy	Miller, Rosie	176.00	168.00	96.00	128.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	1,968.00
Sauer, Jason	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Smith, Kevin	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Stoneburg, Sam	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Total		**704.00**	**672.00**	**624.00**	**632.00**	**736.00**	**672.00**	**704.00**	**736.00**	**640.00**	**736.00**	**704.00**	**672.00**	**8,232.00**
Test Engineer														
Krishna, Sai	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Lewis, Nicole	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	136.00	2,056.00
Sampson, Mike	Kumar, Arun	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	144.00	160.00	152.00	168.00	2,024.00
Turner, Bruce	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Walker, Terry	Miller, Rosie	176.00	168.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	2,088.00
Total		**880.00**	**840.00**	**880.00**	**840.00**	**920.00**	**840.00**	**880.00**	**920.00**	**784.00**	**896.00**	**856.00**	**808.00**	**10,344.00**
Grand Total		**4,200.00**	**4,016.00**	**4,064.00**	**3,912.00**	**4,416.00**	**3,992.00**	**4,104.00**	**4,384.00**	**3,776.00**	**4,376.00**	**4,200.00**	**4,000.00**	**49,440.00**

Report Prerequisites:

- Resource availability amounts display if the resource has availability defined and meets the parameter criteria. The availability amounts are determined by the resource calendar.
- The availability amounts are calculated based on the time slices with the name MONTHLYRESOURCEAVAILCURVE and WEEKLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). These time slices must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The report has a parameter that allows you to run the report by weekly periods. For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*) and (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week. For example, if you set the first day of the work week field to Sunday (*Administration/Project Management-Settings*), then the weekly time slices referenced by this report must also be set to start on Sunday.

- The time periods that display in the report and the availability amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Resource Availability
ID:	CSP_RES_ResourceAvailability
Description:	Resource Availability (CSP)
Executable Name:	/CSP/Resource Availability

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Booking Manager param_book_mgr	Browse Multiple-select	Active Resources LOOKUP_USER_ACTIVE_SEC	No
Resource Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Start Date param_date	Relative Date		Yes Start of Current Month
Period Type param_period	Pull-down Single-select	Report (Week, Month) CSP_RPT_CAL_PERIOD_W_M	Yes Month
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (Resource Manager, Primary Role) CSP_RPT_CMN_MGR_ROLE_GROUP	Yes No Grouping
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Period Type: Week, Month
Unit Type: FTE, Hours
Group By: No Grouping, Resource Manager, Primary Role

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date parameter determines the first time period that displays in the report. There are a total of twelve periods that display on the report, starting with the period in which the start date parameter entered falls. If a date other than the first day of a monthly or weekly period is entered, then the report will evaluate it to the start of the period to which the date entered belongs. For example, if you enter a start date of 01/15/2012, the report will display the first month starting on 01/01/2012. The same is true for weekly periods.
- The Period Type parameter allows you to change the type of time periods that display across the columns of the report. This parameter works in conjunction with the start date parameter to determine the periods that display on the report.

Week	The report displays twelve weeks.
Month	The report displays twelve months.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group the report so you should select this value if you do not want to do a grouping for one of the group by options.
Resource Manager	This option groups the report by resource manager.
Primary Role	This option groups the report by the resource primary role.

Report Fields and Calculations:
The report displays the resource name, primary role, and availability amounts by period and in total, when no grouping option is specified. When grouping by resource manager, the report displays the resource name, primary role, and availability amounts by period and in total. When grouping by primary role, the report displays the resource name, resource manager, and availability amounts by period and in total. Labor and equipment resources are included in the report; expense and material resources are excluded.

The report displays twelve periods, starting with the period entered in the start date parameter. If the period type parameter is month, then the first day of the month in which the start date entered falls is the first monthly period displayed in the report. If the period type parameter is week, then the first date of the week in which the start date entered falls is the first weekly period displayed in the report.

Report Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Labor and equipment resources are included.	srm_resources.resource_type <= 1	Expense and material resources are excluded.
Weekly periods are calculated based on the first day of the work week.	The CSP_CAL_STARTDATE_FCT database function returns the starting day of the week based on the period type and start date passed in. This function contains the following code: SELECT prweekstart + 1 INTO v_day FROM prsite WHERE 1=1;	For period type of week to display data, there are two places in Clarity that must have consistent start days of the week: (1) The start day of the week for the report column headings is retrieved from the First Day of Work Week field set in Clarity (*Administration/Project Management-Settings*). (2) The time slices referenced by the report must all start on the day that you set as the first day of the work week.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY' OR rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'WEEKLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.id = CASE WHEN '{?param_period}' = 'MONTH' THEN 7 ELSE 55559 END	Time slices with the names of MONTHLYRESOURCEAVAILCURVE (ID=7) and WEEKLYRESOURCEAVAILCURVE (ID=55559) are required for this report.

Chapter 4: Time Management

This section contains the following topic:

Crystal Reports

The time management reports provide visibility into timesheets entered by resources across the organization. They also provide insight into any timesheets that are missing for resources that should be entering time.

The reports include:

Resource Time Review by Manager

The Resource Time Review by Manager report displays timesheet entries for each resource, grouped by investment manager or resource manager. This report displays the hours entered on the timesheet by day and in total for each investment and time entry, as well as for each resource.

Resource Time Review by Manager

Period Ending	Status	Type	Investment	Description	Task Status	Input Type	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Kumar, Arun														
Evans, Sean														
12/11/2011	Posted	Task	CRM Enhancements	Database Development	Completed	Regular	8.00	8.00	8.00	0.00	0.00	0.00	0.00	24.00
12/11/2011	Posted	Other	Employee Benefits Application		Started	Regular	0.00	0.00	0.00	8.00	6.50	0.00	0.00	14.50
12/11/2011	Posted	Incident	Call Center Application	Error on Submit of Transaction		Regular	0.00	0.00	0.00	0.00	1.50	0.00	0.00	1.50
12/18/2011	Posted	Task	CRM Enhancements	Database Development	Completed	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
Total							**16.00**	**16.00**	**16.00**	**16.00**	**16.00**	**0.00**	**0.00**	**80.00**
Newburg, Mary														
12/11/2011	Posted	Task	Mobile Security	Functional Design	Started	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
12/18/2011	Posted	Task	Mobile Security	Functional Design	Started	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
Total							**16.00**	**16.00**	**16.00**	**16.00**	**16.00**	**0.00**	**0.00**	**80.00**
Sampson, Mike														
12/11/2011	Posted	Task	CRM Enhancements	Database Development	Completed	Regular	0.00	8.00	8.00	8.00	8.00	0.00	0.00	32.00
12/11/2011	Posted	Task	CRM Enhancements	Technical Design	Completed	Regular	8.00	0.00	0.00	0.00	0.00	0.00	0.00	8.00
12/18/2011	Posted	Task	CRM Enhancements	Database Development	Completed	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
Total							**16.00**	**16.00**	**16.00**	**16.00**	**16.00**	**0.00**	**0.00**	**80.00**
Kumar, Arun Total							**48.00**	**48.00**	**48.00**	**48.00**	**48.00**	**0.00**	**0.00**	**240.00**
Miller, Rosie														
Period Ending	**Status**	**Type**	**Investment**	**Description**	**Task Status**	**Input Type**	**Mon**	**Tue**	**Wed**	**Thu**	**Fri**	**Sat**	**Sun**	**Total**
Morris, Tom														
12/11/2011	Posted	Task	eCommerce Portal	Functional Design	Completed	Regular	4.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00
12/18/2011	Posted	Task	eCommerce Portal	User Interface	Started	Regular	4.00	8.00	8.00	8.00	8.00	0.00	0.00	36.00
Total							**8.00**	**8.00**	**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**40.00**
Walker, Terry														
12/11/2011	Posted	Task	CRM Contact Center	Functional and System Testing	Started	Regular	0.00	0.00	0.00	0.00	8.00	0.00	0.00	8.00
12/11/2011	Posted	Task	CRM Contact Center	Unit and Performance Testing	Completed	Regular	8.00	8.00	8.00	8.00	0.00	0.00	0.00	32.00
12/18/2011	Posted	Task	CRM Contact Center	Functional and System Testing	Started	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
Total							**16.00**	**16.00**	**16.00**	**16.00**	**16.00**	**0.00**	**0.00**	**80.00**
Miller, Rosie Total							**24.00**	**24.00**	**24.00**	**24.00**	**24.00**	**0.00**	**0.00**	**120.00**
Grand Total							**72.00**	**72.00**	**72.00**	**72.00**	**72.00**	**0.00**	**0.00**	**360.00**

Report Prerequisites:

- There must be at least one timesheet for the time period and timesheet status selected when running the report or the report will display a message that there are no results that match your criteria.
- There must be time reporting periods, with a scale of weekly, created (*Administration/Project Management-Time Reporting Periods*). The time reporting period must have a status of open in order to enter time in the period. The report supports time reporting periods set up with a scale of weekly and the weekly periods may start on any day of the week and they will be reflected correctly in the report column headings. The report does not support time reporting periods set up with any of the other following scales: annual, monthly, quarterly, semiannual, daily, biweekly. These other scale types will not display correctly in the report.
- The resource entering time must have the open for time entry field checked and the track mode set to 'Clarity' or 'Other' in order to enter time. The resource date of hire must be blank, prior to the time period, or within the time period for the resource to enter time for the period. The resource date of termination must be blank, after the time period, or within the time period for the resource to enter time for the period.
- The investment must have the open for time entry field checked and the track mode set to 'Clarity' in order to enter time against the investment. If the investment is a project, then the open for time entry field on the task must also be checked in order to enter time against the task.
- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment and for it to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

  In a timesheet, resources may also assign themselves to tasks if they are a team member on the project and the 'Prevent Unassigned Timesheet Tasks' field is unchecked on the project. This field is in the time and staff section of the settings properties on the project. They may also create unplanned tasks in a timesheet if they are a team member on the project and have the appropriate permissions (Project – Edit Project Plan).
- The timesheet hour amounts are calculated based on the time slice with the name DAILYRESOURCETIMECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the dates displayed in this report or the report will not display data for those dates.

Report Definition:

Name:	Resource Time Review by Manager
ID:	CSP_RES_ResTimeReviewByMgr
Description:	Resource Time Review by Manager (CSP)
Executable Name:	/CSP/Resource Time Review by Manager

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Time Period param_from_period	Browse Multiple-select	Report (Time Periods) CSP_RPT_TME_PERIOD	Yes
Timesheet Status param_status	Pull-down Multiple-select	Timesheet Status TIMESHEET_STATUS	Yes Open, Submitted, Returned, Approved, and Posted
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (Investment Manager, Resource Manager) CSP_RPT_CMN_MGR_GROUP	Yes Resource Manager
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Time Period: Current Time Period, Next Time Period, Previous Time Period, List of Time Periods
Timesheet Status: Open, Submitted, Returned, Approved, Posted, Adjusted
Group By: Investment Manager, Resource Manager

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Time Period parameter allows you to determine which time periods display on the report. You must select at least one time period when running the report.
- The Timesheet Status parameter works in conjunction with the time period parameter. The report will only display time periods with the timesheet status you select when running the report. One of the values in the timesheet status parameter is 'Adjusted' and this status requires some additional explanation. An adjusted timesheet is a timesheet which has been posted in Clarity but then changes are made to the timesheet and it is re-posted. As a general rule, it does not make sense to display adjusted timesheets in reports because these timesheets have been replaced with more recently posted timesheets. While the status of 'Adjusted' is available as an option to allow visibility into adjusted timesheets, it should not normally be selected when running the report.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

Investment Manager	This option groups the report by investment manager.
Resource Manager	This option groups the report by resource manager.

Report Fields and Calculations:

The report displays the timesheet period ending, timesheet status, type of time entry, investment, description, task status, input type code, and the timesheet amounts by day and in total. The report includes labor resources only and the timesheet amounts are in hours. The report is formatted to display seven days in the time period; therefore, only weekly time periods are supported for this report. If your weekly time periods start on a day other than Monday, the report adjusts the column headings accordingly. For example, your weekly periods my start on Sunday and in this case the report columns will display Sunday thru Saturday instead of Monday through Sunday as displayed in the above screen capture.

Report Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
A time slice is required for this report.	prj_blb_slicerequests.request_name = 'DAILYRESOURCETIMECURVE'	A time slice with the name of DAILYRESOURCETIMECURVE is required for this report.

Resource Time Summary and Detail

The Resource Time Summary and Detail report displays timesheet hours and notes for each resource and time period. The report may be grouped by resource manager, time period, or any OBS level.

This report allows you to drill down to the Timesheet Detail subreport, by clicking on a resource name, to see more information about the resource hours. If a resource name is in blue font, you may click on it to drill to the subreport. If a resource name is in black font, then the resource does not have any time entries for the period and no drill down is available.

Resource Time Summary and Detail

Development

Resource Name	Time Period		Status	Adjustment	Hours	Note Category	Notes
	Start	End					
Amos, Cheryl	12/5/2011	12/11/2011	Open		40.00	Time Request	More time is needed than what was previously estimated
Amos, Cheryl	12/12/2011	12/18/2011	Open		0.00		
Hill, Wayne	12/5/2011	12/11/2011	Open		44.00	Time Request	Completed Mark's tasks in addition to my own so extra time needed
Hill, Wayne	12/12/2011	12/18/2011	Posted		36.00		
Patel, Sanjay	12/5/2011	12/11/2011	Returned		40.00		
Patel, Sanjay	12/12/2011	12/18/2011	Open		0.00		
Stoneburg, Sam	12/5/2011	12/11/2011	Open		40.00	Reports	Executive report design is more complex than originally anticipated
Stoneburg, Sam	12/12/2011	12/18/2011	Open		40.00	Reports	Executive report design is complete, but estimates need increased for developing and testing
Walker, Terry	12/5/2011	12/11/2011	Posted		40.00		
Walker, Terry	12/12/2011	12/18/2011	Posted		40.00		
Total					**320.00**		

Shared Services

Resource Name	Time Period		Status	Adjustment	Hours	Note Category	Notes
	Start	End					
Evans, Sean	12/5/2011	12/11/2011	Posted		40.00		
Evans, Sean	12/12/2011	12/18/2011	Posted		40.00		
Goldman, Mark	12/5/2011	12/11/2011	Posted		40.00		
Goldman, Mark	12/12/2011	12/18/2011	Posted		4.00		
Kelley, Art	12/5/2011	12/11/2011	Posted		40.00		
Kelley, Art	12/12/2011	12/18/2011	Posted		24.00		
Newburg, Mary	12/5/2011	12/11/2011	Posted		40.00		
Newburg, Mary	12/12/2011	12/18/2011	Posted		40.00		
Total					**268.00**		
Grand Total					**588.00**		

Report Example: Grouped by Organizational Breakdown Structure (OBS)

Timesheet Detail Subreport

The Timesheet Detail subreport displays timesheet entries for a resource and time period. The timesheet entries include tasks, other time, incidents and indirect time. The subreport shows the timesheet hours by day and in total, along with any notes related to the time entry.

Timesheet Detail

Amos, Cheryl

Time Period: 12/5/2011 - 12/11/2011

Investment	Description	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total	Note Category	Notes
Tasks											
CRM Contact Center	User Interface Development	8.00	8.00	0.00	0.00	0.00	0.00	0.00	16.00		
Online Order Improvements	Functional and Technical Design	0.00	0.00	8.00	8.00	2.50	0.00	0.00	18.50	Estimate Increase	Executive report design is taking longer than expected
Other Time											
Administration		0.00	0.00	0.00	0.00	2.00	0.00	0.00	2.00	Meeting	All Hands Meeting
PM Activities (Non-Project)		0.00	0.00	0.00	0.00	2.00	0.00	0.00	2.00	PMO	PMO process review
Incidents											
Altus Online Order Application	Security Error Message	0.00	0.00	0.00	0.00	1.50	0.00	0.00	1.50		
Total		**8.00**	**8.00**	**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**40.00**		

Report Prerequisites:

- The report displays resources that are set up to enter time in Clarity. If the resource does not have a timesheet in Clarity for the time period and timesheet status selected when running the report, then the resource will display in the report with a timesheet status of 'Open' with zero hours. It is not necessary to have at least one timesheet for the resource to display in the report.
- The resource is considered set up for time entry if the following conditions are met on the resource: the open for time entry field is checked; the track mode set to 'Clarity' or 'Other'; the date of hire is blank, prior to the time period, or within the time period; and the date of termination is blank, after the time period, or within the time period.
- There must be time reporting periods, with a scale of weekly, created (*Administration/Project Management-Time Reporting Periods*) for the Timesheet Detail subreport. The time reporting period must have a status of open in order to enter time in the period. The Timesheet Detail subreport supports time reporting periods set up with a scale of weekly and the weekly periods may start on any day of the week and they will be reflected correctly in the subreport column headings. The subreport does not support time reporting periods set up with any of the other following scales: annual, monthly, quarterly, semiannual, daily, and biweekly. These other scale types will not display correctly in the subreport.
- The investment must have the open for time entry field checked and the track mode set to 'Clarity' in order to enter time against the investment. If the investment is a project, then the open for time entry field on the task must also be checked in order to enter time against the task.
- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment and for it to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

  In a timesheet, resources may also assign themselves to tasks if they are a team member on the project and the 'Prevent Unassigned Timesheet Tasks' field is unchecked on the project. This field is in the time and staff section of the settings properties on the project. They may also create unplanned tasks in a timesheet if they are a team member on the project and have the appropriate permissions (Project – Edit Project Plan).
- The timesheet hour amounts in the Timesheet Detail subreport are calculated based on the time slice with the name DAILYRESOURCETIMECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the dates displayed in this subreport or the subreport will not display data for those dates.
- The OBS level group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of resources to an OBS unit because the association of resources to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added resources to an OBS unit, removed resources from an OBS unit, or moved resources from one OBS unit to another.

Report Definition:

Name:	Resource Time Summary and Detail
ID:	CSP_RES_TimeSummaryAndDetail
Description:	Resource Time Summary and Detail (CSP)
Executable Name:	/CSP/Resource Time Summary and Detail

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Time Period param_from_period	Browse Multiple-select	Report (Time Periods) CSP_RPT_TME_PERIOD	Yes
Timesheet Status param_status	Pull-down Multiple-select	Timesheet Status TIMESHEET_STATUS	Yes Open, Submitted, Returned, Approved, and Posted
Include Zero Hour Timesheets? param_incl_zero	Checkbox		No Checked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (Resource Manager, Time Period, OBS Level) CSP_RPT_CMN_MGR_TME_OBS_GROUP	Yes Resource Manager
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Time Period: Current Time Period, Next Time Period, Previous Time Period, List of Time Periods
Timesheet Status: Open, Submitted, Returned, Approved, Posted, Adjusted
Group By: Resource Manager, Time Period, OBS Level 1-10

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.

- The Time Period parameter allows you to determine which time periods display on the report. You must select at least one time period when running the report.
- The Timesheet Status parameter works in conjunction with the time period parameter. The report will only display time periods with the timesheet status you select when running the report. One of the values in the timesheet status parameter is 'Adjusted' and this status requires some additional explanation. An adjusted timesheet is a timesheet which has been posted in Clarity but then changes are made to the timesheet and it is re-posted. As a general rule, it does not make sense to display adjusted timesheets in reports because these timesheets have been replaced with more recently posted timesheets. While the status of 'Adjusted' is available as an option to allow visibility into adjusted timesheets, it should not normally be selected when running the report.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

  Resource Manager This option groups the report by resource manager and displays the following columns as the first three columns in the report: resource name, time period start and time period end.

  Time Period This option groups the report by time reporting period and displays the following columns as the first two columns in the report: resource name and resource manager.

  OBS Level 1-10 This option groups the report by OBS level and displays the following columns as the first three columns in the report: resource name, time period start and time period end. This grouping option requires that you select a unit in the resource OBS parameter in order to group by an OBS level. The resource OBS parameter and grouping by an OBS level work in conjunction with one another. The resource OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the resources attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report.

  If you group by an OBS level that is lower in the hierarchy, then the report groups the resources by this level (e.g., OBS Level 4). If resources are associated to units above level 4 (e.g., resources are attached to levels 2 and 3), then the resources associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the resource at the level by which you are grouping.

  If you group by an OBS level but you do not select a unit in the resource OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the resource OBS parameter to determine which OBS to use for grouping.

Report Fields and Calculations:

If the report is grouped by resource manager or OBS level, then the report displays the following columns: resource name, time period start, time period end, timesheet status, adjustment, hours, note category, and notes. If the report is grouped by time period, then the report displays the following columns: resource name, resource manager, timesheet status, adjustment, hours, note category, and notes. The amounts are displayed in hours and include labor resources only.

The adjustment column displays a checkmark icon if the timesheet for the period is an adjustment timesheet for a previously posted timesheet. The hours for the resource are the total hours entered on the resource’s timesheet for the time period. The note category and notes columns are the notes entered on the timesheet. If there is more than one note on the timesheet, then the other notes appear as additional rows on the report for the resource and time period.

Subreport Fields and Calculations:
The subreport is grouped by resource and time period and it displays the following columns: investment, description, hours entered for each time entry by day and in total, note category, and notes. If there is more than one note on the time entry, then the other notes appear as additional rows on the subreport for the time entry. The subreport is formatted to display seven days in the time period; therefore, only weekly time periods are supported for this subreport. If your weekly time periods start on a day other than Monday, the subreport adjusts the column headings accordingly. For example, your weekly periods my start on Sunday and in this case the subreport columns will display Sunday thru Saturday instead of Monday through Sunday as displayed in the above screen capture.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	prj_resources.prIsRole = 0	Roles are excluded.
Resources must track their time thru Clarity or Other in order to be included in the report.	prj_resources.prIsOpen = 1 AND prj_resources.prTrackMode IN (1, 2)	Resources must have Open for Time Entry checked and Track Mode = 'Clarity' or 'Other' in order to be included in the report.
Resources must employed during the time period selected in the parameter to be included in the report	NVL(srm_resources.date_of_hire, TO_DATE('01/01/1900', 'MM/DD/YYYY')) < prTimePeriod.prFinish -1 AND NVL(srm_resources.date_of_termination, TO_DATE('12/31/2100', 'MM/DD/YYYY')) > prTimePeriod.prStart	Resources must have a hire date less than the report time period finish date or no hire date. They must also have a date of termination greater than the report time period start date or no date of termination.
The OBS unit name, displayed when the report is grouped by an OBS level, is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND prj_obs_associations.table_name = 'SRM_RESOURCES'	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.
A time slice is required for the subreport.	prj_blb_slicerequests.request_name = 'DAILYRESOURCETIMECURVE'	A time slice with the name of DAILYRESOURCETIMECURVE is required for the subreport.

Time Compliance

The Time Compliance report displays the timesheet compliance % by OBS unit. The report also displays the number of timesheets by status and in total, for each OBS unit. It displays the number of timesheets that are open, submitted, returned, approved, and posted for each OBS unit.

This report allows you to drill down to the Time Compliance Detail subreport, by clicking on an OBS unit name, to view the timesheet status by resource in the OBS.

Time Compliance

OBS Unit Name	Compliance %	Number of Timesheets	Number of Timesheets by Status				
			Open	Submitted	Returned	Approved	Posted
All Groups	87.76	490	2	3	1	0	43
External	75.00	12	2	1	0	0	9
Offshore Development	80.00	5	1	0	0	0	4
Onshore Development	71.43	7	1	1	0	0	5
Internal	91.89	37	0	2	1	0	34
Development	94.74	19	0	0	1	0	18
Operations	100.00	10	0	0	0	0	10
Shared Services	75.00	8	0	2	0	0	6

Time Compliance Detail Subreport

The Time Compliance Detail subreport displays the timesheet status by resource, including email address, employment type, and resource manager. It shows all of the resources in the OBS that you selected when drilling from the main report.

Time Compliance Detail

Resource Name	Email Address	Period Ending	Status	Employment Type	Resource Manager
External					
Offshore Development					
Gupta, Rakesh	rakeshGupta@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Khan, Sanjay	sanjayKhan@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Krishna, Sai	saiKrishna@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Kumar, Arun	arunKumar@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Patel, Deepak	deepakPatel@mailserver.com	2/19/2013	Open	Contractor	Kumar, Arun
Onshore Development					
Goldman, Mark	markGoldman@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Johnson, Eric	ericJohnson@mailserver.com	2/19/2013	Submitted	Contractor	Kumar, Arun
Kelley, Art	artKelley@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Levert, Ed	edLevert@mailserver.com	2/19/2013	Open	Contractor	Kumar, Arun
Newburg, Mary	maryNewburg@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Sampson, Mike	mikeSampson@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun
Tendulkar, Sachin	sachinTendulkar@mailserver.com	2/19/2013	Posted	Contractor	Kumar, Arun

Report Prerequisites:

- The report displays resources that are set up to enter time in Clarity. If the resource does not have a timesheet in Clarity for the time period selected when running the report, then the resource will display in the report with a timesheet status of 'Open'. It is not necessary to have at least one timesheet for the resource to display in the report.
- The resource is considered set up for time entry if the following conditions are met on the resource: the open for time entry field is checked; the track mode set to 'Clarity' or 'Other'; the date of hire is blank, prior to the time period, or within the time period; and the date of termination is blank, after the time period, or within the time period.
- There must be time reporting periods created (*Administration/Project Management-Time Reporting Periods*). The time reporting period must have a status of open in order to enter time in the period.
- The investment must have the open for time entry field checked and the track mode set to 'Clarity' in order to enter time against the investment. If the investment is a project, then the open for time entry field on the task must also be checked in order to enter time against the task.
- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

  In a timesheet, resources may also assign themselves to tasks if they are a team member on the project and the 'Prevent Unassigned Timesheet Tasks' field is unchecked on the project. This field is in the time and staff section of the settings properties on the project. They may also create unplanned tasks in a timesheet if they are a team member on the project and have the appropriate permissions (Project – Edit Project Plan).
- The Number of OBS Levels group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of resources to an OBS unit because the association of resources to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added resources to an OBS unit, removed resources from an OBS unit, or moved resources from one OBS unit to another.

Report Definition:

Name:	Time Compliance
ID:	CSP_TME_Compliance
Description:	Time Compliance (CSP)
Executable Name:	/CSP/ Time Compliance

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No Contractor, Employee
Time Period param_period	Browse Multiple-select	Report (Time Periods) CSP_RPT_TME_PERIOD	Yes
Compliance % Yellow Threshold param_y_thres	Text		Yes 90
Compliance % Red Threshold param_r_thres	Text		Yes 75
Number of OBS Levels param_levels	Pull-down Single-select	Report (Number of OBS Levels 1 - 4) CSP_RPT_CMN_OBS_4LEVEL_ENUM	Yes 2
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Time Period: Current Time Period, Next Time Period, Previous Time Period, List of Time Periods
Number of OBS Levels: 1, 2, 3, 4

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Time Period parameter allows you to determine which time periods display on the report. You must select at least one time period when running the report.
- The Compliance % Yellow and Compliance % Red Threshold parameters allow you to control when the background color changes to yellow and red, respectively, for the Compliance % column in the report. If the Compliance % in the report is greater than the Compliance % Yellow Threshold, then there is no background color. If the Compliance % is less than the Compliance % Yellow Threshold, then it will be yellow until it falls below the Compliance % Red Threshold entered as a parameter. Amounts that are less than the Compliance % Red Threshold will be red. In the above screen capture, the Compliance % Yellow Threshold parameter entered when running the report is 90% and the Compliance % Red Threshold is 75%. Entering these values means that the Compliance % will turn yellow when it is less than 90% and turn red when it is less than 75%.

- The report has a Number of OBS Levels parameter that allows you to control which levels of the organizational breakdown structure you display in the report to calculate compliance for those levels. This parameter works in conjunction with the Resource OBS parameter. The Number of OBS Levels parameter works as follows:

1	The report displays one OBS level, the level selected in the Resource OBS parameter. It rolls up the compliance % calculation and number of timesheets to include all resources associated to OBS units below the OBS unit displayed in the report.
2	The report displays two OBS levels, starting from the level selected in the Resource OBS parameter. It rolls up the compliance % calculation and number of timesheets, at each level, to include all resources associated to OBS units below the OBS units displayed in the report.
3	The report displays three OBS levels, starting from the level selected in the Resource OBS parameter. It rolls up the compliance % calculation and number of timesheets, at each level, to include all resources associated to OBS units below the OBS units displayed in the report.
4	The report displays four OBS levels, starting from the level selected in the Resource OBS parameter. It rolls up the compliance % calculation and number of timesheets, at each level, to include all resources associated to OBS units below the OBS units displayed in the report.

Report Fields and Calculations:
The report displays the following columns: OBS unit name, compliance %, number of timesheets, and number of timesheets by status including: open, submitted, returned, approved, and posted. The report is grouped by OBS level. This report contains the following calculation:

Compliance %

The compliance % field is the percentage of timesheets posted versus those to be entered for the time periods included in the report.

Compliance % background color is determined as follows:

Yellow	The Compliance % is less than the Compliance % Yellow Threshold entered as a parameter. It will be yellow until it falls below the Compliance % Red Threshold entered as a parameter.
Red	The Compliance % is less than the Compliance % Red Threshold entered as a parameter.

Formula:
(Number of Posted Timesheets / Total Number of Timesheets) * 100

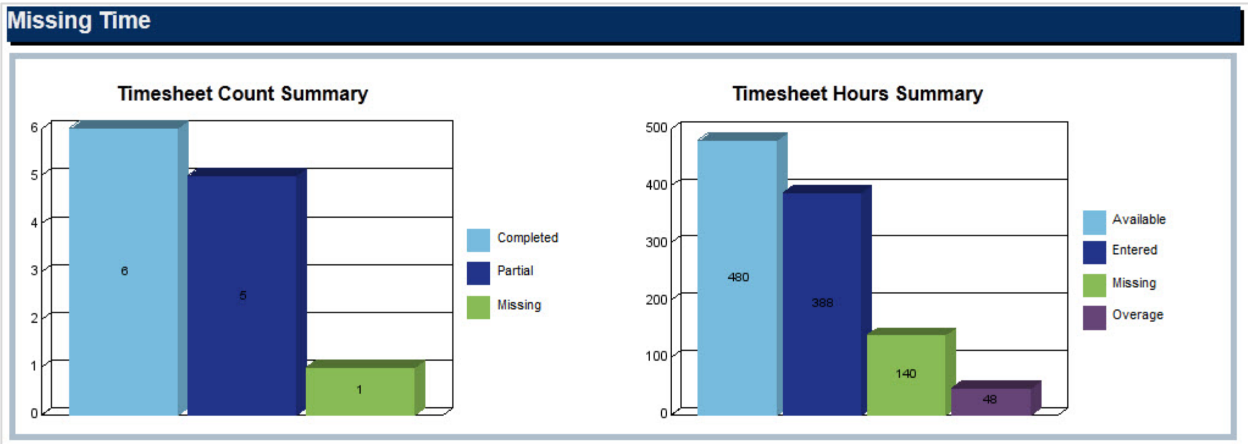
Subreport Fields and Calculations:
The subreport is grouped by OBS level selected in the main report and it displays the following columns: resource name, email address, time period ending, timesheet status, employment type, and resource manager.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	prj_resources.prIsRole = 0	Roles are excluded.
Resources must track their time thru Clarity or Other in order to be included in the report.	prj_resources.prIsOpen = 1 AND prj_resources.prTrackMode IN (1, 2)	Resources must have Open for Time Entry checked and Track Mode = 'Clarity' or 'Other' in order to be included in the report.
Resources must be employed during the time period selected in the parameter to be included in the report	NVL(srm_resources.date_of_hire, TO_DATE('01/01/1900', 'MM/DD/YYYY')) < prTimePeriod.prFinish -1 AND NVL(srm_resources.date_of_termination, TO_DATE('12/31/2100', 'MM/DD/YYYY')) > prTimePeriod.prStart	Resources must have a hire date less than the report time period finish date or no hire date. They must also have a date of termination greater than the report time period start date or no date of termination.
The OBS unit name displayed in the report is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND prj_obs_associations.table_name = 'SRM_RESOURCES'	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.

Missing Time

The Missing Time report displays resource available hours, timesheet hours entered, and timesheet hours missing by resource and time period. The report may be grouped by resource manager or OBS level. The report also has an option to calculate missing time based on timesheet status or resource availability. The charts include a summary of timesheets across the periods included in the report. The Timesheet Count Summary displays the number of timesheets that are completed, partially completed, or missing for the time periods. The Timesheet Hours Summary displays the number of hours grouped by resource availability, timesheets entered, timesheets missing, and overage.



Resource Name	Employment Type	Primary Role	Available	Entered	Missing	Status	Email Address
Development							
Time Period: 11/28/2011 - 12/4/2011							
Hayes, Todd	Employee	Architect	40.00	0.00	40.00	Open	toddHayes@mailserver.com
Morris, Tom	Employee	Architect	40.00	36.00	4.00	Posted	tomMorris@mailserver.com
Murphy, Carolyn	Contractor	Developer	40.00	16.00	24.00	Open	carolynMurphy@mailserver.com
Turner, Bruce	Employee	Test Engineer	40.00	8.00	32.00	Open	bruceTurner@mailserver.com
Total			**160.00**	**60.00**	**100.00**		
Development Total			**160.00**	**60.00**	**100.00**		
Shared Services							
Time Period: 11/28/2011 - 12/4/2011							
Johnson, Eric	Contractor	Developer	40.00	32.00	8.00	Open	ericJohnson@mailserver.com
Kelley, Art	Contractor	Architect	40.00	8.00	32.00	Open	artKatect@mailserver.com
Total			**80.00**	**40.00**	**40.00**		
Shared Services Total			**80.00**	**40.00**	**40.00**		
Grand Total			**240.00**	**100.00**	**140.00**		

Report Prerequisites:

- The report displays resources that are set up to enter time in Clarity. If the resource does not have a timesheet in Clarity for the time period and timesheet status selected when running the report, then the resource will display in the report with a timesheet status of 'Open' with zero hours. It is not necessary to have at least one timesheet for the resource to display in the report.
- The resource is considered set up for time entry if the following conditions are met on the resource: the open for time entry field is checked; the track mode set to 'Clarity' or 'Other'; the date of hire is blank, prior to the time period, or within the time period; and the date of termination is blank, after the time period, or within the time period.
- There must be time reporting periods created (*Administration/Project Management-Time Reporting Periods*). The time reporting period must have a status of open in order to enter time in the period.
- The investment must have the open for time entry field checked and the track mode set to 'Clarity' in order to enter time against the investment. If the investment is a project, then the open for time entry field on the task must also be checked in order to enter time against the task.

- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment and for it to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

  In a timesheet, resources may also assign themselves to tasks if they are a team member on the project and the 'Prevent Unassigned Timesheet Tasks' field is unchecked on the project. This field is in the time and staff section of the settings properties on the project. They may also create unplanned tasks in a timesheet if they are a team member on the project and have the appropriate permissions (Project – Edit Project Plan).
- The resource available hours are calculated based on the time slice with the name DAILYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the dates displayed in this report or the report will not display data for those dates.
- The OBS level group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of resources to an OBS unit because the association of resources to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added resources to an OBS unit, removed resources from an OBS unit, or moved resources from one OBS unit to another.

Report Definition:

Name:	Missing Time
ID:	CSP_TME_MissingTime
Description:	Missing Time (CSP)
Executable Name:	/CSP/Missing Time

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Primary Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Time Period param_time_period	Browse Multiple-select	Report (Time Periods) CSP_RPT_TME_PERIOD	Yes
Timesheet Status param_status	Pull-down Multiple-select	Timesheet Status TIMESHEET_STATUS	Yes Open, Submitted, Returned, Approved, and Posted
Calculate Missing Time Based on Timesheet Status? param_avail_chk	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Show Timesheet Summary Graph? param_graph	Checkbox		No Checked
Group By param_group	Pull-down Single-select	Report (Resource Manager, OBS Level) CSP_RPT_CMN_MGR_OBS_GROUP	Yes Resource Manager
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Time Period: Current Time Period, Next Time Period, Previous Time Period, List of Time Periods
Timesheet Status: Open, Submitted, Returned, Approved, Posted, Adjusted
Group By: Resource Manager, OBS Level 1-10

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Time Period parameter allows you to determine which time periods display on the report. You must select at least one time period when running the report.
- The Timesheet Status parameter works in conjunction with the time period parameter. The report will only display time periods with the timesheet status you select when running the report. One of the values in the timesheet status parameter is 'Adjusted' and this status requires some additional explanation. An adjusted timesheet is a timesheet which has been posted in Clarity but then changes are made to the timesheet and it is re-posted. As a general rule, it does not make sense to display adjusted timesheets in reports because these timesheets have been replaced with more recently posted timesheets. While the status of 'Adjusted' is available as an option to allow visibility into adjusted timesheets, it should not normally be selected when running the report.

- The Calculate Missing Time Based on Timesheet Status parameter determines how missing time is calculated in the report. This allows you to determine if you want to calculate missing time based on timesheet status or resource time entered being less than availability.

  When this parameter is checked, the timesheet statuses selected in the timesheet status parameter determine missing time and the available hours are not used to determine missing timesheets. For example, if you select timesheet statuses of open and submitted, then only timesheets with a status of open and submitted are considered missing time in the report. Timesheets with a status of returned, approved, posted or adjusted are not considered missing.

  When this parameter is not checked, the report compares the hours entered on a timesheet to the resource's available hours to determine missing time. For example, if a resource enters 32 hours on a timesheet, but is available for 40 hours in the time period, then 8 hours are considered missing time.
- The Show Timesheet Summary Graph parameter controls whether the Timesheet Count Summary and Timesheet Hours Summary charts display on the report. If the parameter is checked, the charts will display on the top of the first page of the report. If the parameter is not checked, the charts will not display.
- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

  Resource Manager This option groups the report by resource manager.

  OBS Level 1-10 This option groups the report by OBS level and requires that you also select a unit in the resource OBS parameter. The resource OBS parameter and grouping by an OBS level work in conjunction with one another. The resource OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the resources attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report.

  If you group by an OBS level that is lower in the hierarchy, then the report groups the resources by this level (e.g., OBS Level 4). If resources are associated to units above level 4 (e.g., resources are attached to levels 2 and 3), then the resources associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the resource at the level by which you are grouping.

  If you group by an OBS level but you do not select a unit in the resource OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the resource OBS parameter to determine which OBS to use for grouping.

Report Fields and Calculations:

The report includes only resources with missing time and displays the following columns: resource name, employment type, primary role, available hours, entered hours, missing hours, timesheet status and email address. The report may be grouped by resource manager or OBS level.

The report has two charts: Timesheet Count Summary and Timesheet Hours Summary. The charts include all resources meeting the parameter criteria, not only resources with missing time. This gives you visibility into all of the timesheets for the periods selected when running the report. Therefore, the charts do not tie to the numbers represented in the body of the report. The amounts in the charts are summary numbers for all resources who should be entering time in the time periods of the report.

The Timesheet Count Summary chart displays timesheet counts for the categories of Completed, Partial, and Missing. A completed timesheet is a timesheet where the hours entered on the timesheet are greater than or equal to the resource available hours for the time period. A partial timesheet is a timesheet where the hours entered on the timesheet are less than the resource available hours for the time period. A missing timesheet means that the timesheet has zero hours entered for the time period or a timesheet has not be created for the time period. If a resource meets the following criteria and does not have a timesheet entered for the time period, then the resource is included in the report as having missing time: open for time entry, track mode of Clarity, either no date of hire or a date of hire less than the period end date, and either no termination date or a termination date greater than the period start date.

The Timesheet Hours Summary chart displays hours grouped by the categories of Available, Entered, Missing, and Overage. Available hours are the sum of available hours for the resources meeting the parameter criteria. Entered hours are the sum of the hours entered on their timesheets. Missing hours is the sum of available hours per time period minus hours entered on each timesheet. Overage hours are the sum of hours entered on each timesheet that are greater than the available hours per time period.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	prj_resources.prIsRole = 0	Roles are excluded.
Resources must track their time thru Clarity or Other in order to be included in the report.	prj_resources.prIsOpen = 1 AND prj_resources.prTrackMode IN (1, 2)	Resources must have Open for Time Entry checked and Track Mode = 'Clarity' or 'Other' in order to be included in the report.
Resources must employed during the time period selected in the parameter to be included in the report	NVL(srm_resources.date_of_hire, TO_DATE('01/01/1900', 'MM/DD/YYYY')) < prTimePeriod.prFinish -1 AND NVL(srm_resources.date_of_termination, TO_DATE('12/31/2100', 'MM/DD/YYYY')) > prTimePeriod.prStart	Resources must have a hire date less than the report time period finish date or no hire date. They must also have a date of termination greater than the report time period start date or no date of termination.
The OBS unit name, displayed when the report is grouped by an OBS level, is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND prj_obs_associations.table_name = 'SRM_RESOURCES'	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.
A time slice is required for the report.	prj_blb_slicerequests.id = 1	A time slice with the name of DAILYRESOURCEAVAILCURVE is required for the report.

Chapter 5: Financial Management

This section contains the following topic:

Crystal Reports

The financial management reports provide visibility into financial plans and actual cost of investments across the organization. The reports include capital, expense, budget, and forecast analysis. One financial report also provides visibility into financial transactions, by resource and day, across investments.

The reports include:

Financial Capitalization by Investment

The Financial Capitalization by Investment report displays capital and operating amounts for each investment. These amounts include: budget or planned, actual, remaining cost, and percent spent. The report offers the ability to group by up to three options, which may be any combination of the following: Investment Manager, Business Owner, Investment Type, Project Type, and OBS Level. This report also allows you to drill down to the Financial Capitalization Detail subreport, by clicking on an investment name, to view amounts by fiscal month.

Financial Capitalization (USD)

Investment	Start Date	Finish Date	Planned	Capital Planned	Capital Actual	Capital Planned Remaining	Capital % Spent	Operating Planned	Operating Actual	Operating Planned Remaining	Operating % Spent
Quinn, Randy											
Client Services Application	2/4/2013	8/30/2013	214,800.00	119,200.00	0.00	119,200.00	0.00	95,600.00	0.00	95,600.00	0.00
eCommerce Portal	10/8/2012	10/11/2013	368,300.00	342,300.00	6,000.00	336,300.00	1.75	26,000.00	0.00	26,000.00	0.00
Global Expense Application	11/1/2012	8/1/2013	837,000.00	525,000.00	0.00	525,000.00	0.00	312,000.00	5,250.00	306,750.00	1.68
Online Customer Release	4/1/2013	8/2/2013	270,400.00	0.00	0.00	0.00	0.00	270,400.00	0.00	270,400.00	0.00
Online Order Entry	1/2/2013	8/23/2013	734,000.00	680,000.00	0.00	680,000.00	0.00	54,000.00	62,880.00	-8,880.00	116.44
Online Orders	12/10/2012	8/23/2013	378,400.00	232,800.00	12,000.00	220,800.00	5.15	145,600.00	59,714.30	85,885.70	41.01
Quinn, Randy Total			**2,802,900.00**	**1,899,300.00**	**18,000.00**	**1,881,300.00**	**0.95**	**903,600.00**	**127,844.30**	**775,755.70**	**14.15**
Roberts, Beth											
Credit Card Processing	1/2/2013	8/1/2013	130,400.00	130,400.00	5,600.00	124,800.00	4.29	0.00	0.00	0.00	0.00
CRM Contact Center	10/1/2012	8/1/2013	70,000.00	18,000.00	19,200.00	-1,200.00	106.67	52,000.00	18,000.00	34,000.00	34.62
CRM Enhancements	11/5/2012	8/23/2013	76,300.00	57,600.00	6,000.00	51,600.00	10.42	18,700.00	19,200.00	-500.00	102.67
Global Order Processing	3/4/2013	8/16/2013	451,080.00	0.00	0.00	0.00	0.00	451,080.00	0.00	451,080.00	0.00
Online Order Catalog	12/1/2012	1/31/2014	239,650.00	239,650.00	68,720.00	170,930.00	28.68	0.00	0.00	0.00	0.00
Online Order Improvements	1/2/2013	9/6/2013	308,000.00	185,000.00	0.00	185,000.00	0.00	123,000.00	0.00	123,000.00	0.00
Online System Enhancements	9/3/2012	8/30/2013	1,115,160.00	835,000.00	0.00	835,000.00	0.00	280,160.00	324,160.00	-44,000.00	115.71
Order Management	9/10/2012	8/23/2013	183,300.00	183,300.00	0.00	183,300.00	0.00	0.00	0.00	0.00	0.00
Order Trending Analysis	1/2/2013	5/24/2013	258,400.00	162,800.00	0.00	162,800.00	0.00	95,600.00	0.00	95,600.00	0.00
Web Application Enhancement	1/2/2013	9/6/2013	232,900.00	143,300.00	0.00	143,300.00	0.00	89,600.00	0.00	89,600.00	0.00
Roberts, Beth Total			**3,065,190.00**	**1,955,050.00**	**99,520.00**	**1,855,530.00**	**5.09**	**1,110,140.00**	**361,360.00**	**748,780.00**	**32.55**
Tanner, Paul											
HR Claims Automation	3/4/2013	12/6/2013	374,380.00	0.00	0.00	0.00	0.00	374,380.00	0.00	374,380.00	0.00
HR Claims Enhancement	2/4/2013	5/24/2013	258,400.00	162,800.00	0.00	162,800.00	0.00	95,600.00	0.00	95,600.00	0.00
PCI Controls Remediation	2/4/2013	8/23/2013	194,000.00	98,400.00	6,000.00	92,400.00	6.10	95,600.00	12,000.00	83,600.00	12.55
Security Compliance	1/2/2013	2/8/2013	844,400.00	844,400.00	0.00	844,400.00	0.00	0.00	0.00	0.00	0.00
Security Enhancements	4/3/2013	12/27/2013	418,400.00	162,800.00	0.00	162,800.00	0.00	255,600.00	0.00	255,600.00	0.00
XPL Translations	3/4/2013	6/21/2013	710,000.00	418,800.00	0.00	418,800.00	0.00	291,200.00	0.00	291,200.00	0.00
Tanner, Paul Total			**2,799,580.00**	**1,687,200.00**	**6,000.00**	**1,681,200.00**	**0.36**	**1,112,380.00**	**12,000.00**	**1,100,380.00**	**1.08**
Grand Total			**8,667,670.00**	**5,541,550.00**	**123,520.00**	**5,418,030.00**	**2.23**	**3,126,120.00**	**501,204.30**	**2,624,915.70**	**16.03**

Report Example 1: Grouped by Business Owner

The below report example is grouped by two, of the possible three, grouping options. It is grouped first by OBS Level and second by Business Owner. The grouping options are fairly flexible, allowing you to summarize the data and subtotal it by a variety of grouping attributes including: Investment Manager, Business Owner, Investment Type, Project Type, and OBS Level. These grouping options may be applied in any order so, for example, you may group first by OBS Level, second by Investment Type, and third by Investment Manager. Alternatively, you may group first by Investment Type, second by Investment Manager, and third by OBS Level. You may also group by one attribute or three attributes, offering a wide range of grouping and subtotaling options.

Financial Capitalization (USD)

Investment	Start Date	Finish Date	Planned	Capital Planned	Capital Actual	Capital Planned Remaining	Capital % Spent	Operating Planned	Operating Actual	Operating Planned Remaining	Operating % Spent
Application Management											
Quinn, Randy											
Client Services Application	2/4/2013	8/30/2013	214,800.00	119,200.00	0.00	119,200.00	0.00	95,600.00	0.00	95,600.00	0.00
Global Expense Application	11/1/2012	8/1/2013	837,000.00	525,000.00	0.00	525,000.00	0.00	312,000.00	5,250.00	306,750.00	1.68
Quinn, Randy Total			**1,051,800.00**	**644,200.00**	**0.00**	**644,200.00**	**0.00**	**407,600.00**	**5,250.00**	**402,350.00**	**1.29**
Application Management Total			**1,051,800.00**	**644,200.00**	**0.00**	**644,200.00**	**0.00**	**407,600.00**	**5,250.00**	**402,350.00**	**1.29**
Internal Initiatives											
Tanner, Paul											
HR Claims Automation	3/4/2013	12/6/2013	374,380.00	0.00	0.00	0.00	0.00	374,380.00	0.00	374,380.00	0.00
HR Claims Enhancement	2/4/2013	5/24/2013	258,400.00	162,800.00	0.00	162,800.00	0.00	95,600.00	0.00	95,600.00	0.00
Tanner, Paul Total			**632,780.00**	**162,800.00**	**0.00**	**162,800.00**	**0.00**	**469,980.00**	**0.00**	**469,980.00**	**0.00**
Internal Initiatives Total			**632,780.00**	**162,800.00**	**0.00**	**162,800.00**	**0.00**	**469,980.00**	**0.00**	**469,980.00**	**0.00**
Online Order Management											
Quinn, Randy											
eCommerce Portal	10/8/2012	10/11/2013	368,300.00	342,300.00	6,000.00	336,300.00	1.75	26,000.00	0.00	26,000.00	0.00
Online Customer Release	4/1/2013	8/2/2013	270,400.00	0.00	0.00	0.00	0.00	270,400.00	0.00	270,400.00	0.00
Online Order Entry	1/2/2013	8/23/2013	734,000.00	680,000.00	0.00	680,000.00	0.00	54,000.00	62,880.00	-8,880.00	116.44
Online Orders	12/10/2012	8/23/2013	378,400.00	232,800.00	12,000.00	220,800.00	5.15	145,600.00	59,714.30	85,885.70	41.01
Quinn, Randy Total			**1,751,100.00**	**1,255,100.00**	**18,000.00**	**1,237,100.00**	**1.43**	**496,000.00**	**122,594.30**	**373,405.70**	**24.72**
Roberts, Beth											
Credit Card Processing	1/2/2013	8/1/2013	130,400.00	130,400.00	5,600.00	124,800.00	4.29	0.00	0.00	0.00	0.00
CRM Contact Center	10/1/2012	8/1/2013	70,000.00	18,000.00	19,200.00	-1,200.00	106.67	52,000.00	18,000.00	34,000.00	34.62
CRM Enhancements	11/5/2012	8/23/2013	76,300.00	57,600.00	6,000.00	51,600.00	10.42	18,700.00	19,200.00	-500.00	102.67
Online Order Catalog	12/1/2012	1/31/2014	239,650.00	239,650.00	68,720.00	170,930.00	28.68	0.00	0.00	0.00	0.00
Online Order Improvements	1/2/2013	9/6/2013	308,000.00	185,000.00	0.00	185,000.00	0.00	123,000.00	0.00	123,000.00	0.00
Online System Enhancements	9/3/2012	8/30/2013	1,115,160.00	835,000.00	0.00	835,000.00	0.00	280,160.00	324,160.00	-44,000.00	115.71
Web Application Enhancement	1/2/2013	9/6/2013	232,900.00	143,300.00	0.00	143,300.00	0.00	89,600.00	0.00	89,600.00	0.00
Roberts, Beth Total			**2,172,410.00**	**1,608,950.00**	**99,520.00**	**1,509,430.00**	**6.19**	**563,460.00**	**361,360.00**	**202,100.00**	**64.13**
Online Order Management Total			**3,923,510.00**	**2,864,050.00**	**117,520.00**	**2,746,530.00**	**4.10**	**1,059,460.00**	**483,954.30**	**575,505.70**	**45.68**
Grand Total			**5,608,090.00**	**3,671,050.00**	**117,520.00**	**3,553,530.00**	**3.20**	**1,937,040.00**	**489,204.30**	**1,447,835.70**	**25.26**

Report Example 2: Grouped by Organizational Breakdown Structure (OBS) and Business Owner

Financial Capitalization Detail Subreport

The Financial Capitalization Detail subreport displays the budget or planned, actual and remaining amounts by fiscal month and in total for the fiscal year. The amounts are grouped by cost type (capital, operating) and transaction type (equipment, expenses, labor, and material). If there are labor actual amounts for the period, then the amounts are listed by resource name in the Actual Detail section of the subreport that follows the Labor section. If there are no labor actual amounts for the periods in the subreport, then the Actual Detail section does not display.

Financial Capitalization Detail (USD)

Online Order Entry

Transaction Type	2013-01	2013-02	2013-03	2013-04	2013-05	2013-06	2013-07	2013-08	2013-09	2013-10	2013-11	2013-12	Total
Capital													
Planned	**10,000.00**	**10,000.00**	**40,000.00**	**40,000.00**	**30,000.00**	**50,000.00**	**50,000.00**	**50,000.00**	**100,000.00**	**100,000.00**	**100,000.00**	**100,000.00**	**680,000.00**
Actual	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Remaining	**10,000.00**	**10,000.00**	**40,000.00**	**40,000.00**	**30,000.00**	**50,000.00**	**50,000.00**	**50,000.00**	**100,000.00**	**100,000.00**	**100,000.00**	**100,000.00**	**680,000.00**
Equipment													
Planned	0.00	0.00	10,000.00	10,000.00	10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30,000.00
Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Remaining	0.00	0.00	10,000.00	10,000.00	10,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	30,000.00
Labor													
Planned	10,000.00	10,000.00	30,000.00	30,000.00	20,000.00	50,000.00	50,000.00	50,000.00	100,000.00	100,000.00	100,000.00	100,000.00	650,000.00
Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Remaining	10,000.00	10,000.00	30,000.00	30,000.00	20,000.00	50,000.00	50,000.00	50,000.00	100,000.00	100,000.00	100,000.00	100,000.00	650,000.00
Operating													
Planned	**50,000.00**	**2,000.00**	**2,000.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**54,000.00**
Actual	**62,880.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**62,880.00**
Remaining	**-12,880.00**	**2,000.00**	**2,000.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**-8,880.00**
Labor													
Planned	50,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	50,000.00
Actual	62,880.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	62,880.00
Remaining	-12,880.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	-12,880.00
Actual Detail													
McCarthy, John	32,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	32,000.00
Parker, Ashley	12,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	12,000.00
Sampson, Mike	8,320.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	8,320.00
Stoneburg, Sam	10,560.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	10,560.00
Total	**62,880.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**	**62,880.00**
Material													
Planned	0.00	2,000.00	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,000.00
Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Remaining	0.00	2,000.00	2,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4,000.00

Report Prerequisites:

- The investment must have at least one financial plan for the investment to display in the report. The report has a financial plan type parameter with the values of budget or planned so you may run the report for budget or cost plan amounts. If the financial plan type parameter is budget, then the investment must have at least one approved budget for the investment to display in the report. If the financial plan type parameter is planned, then the investment must have at least one cost plan for the investment to display in the report.
- The financial plan must have cost type selected as a grouping attribute and financial plan detail rows must exist for the capital and operating cost types. This report only includes financial plans that have cost type as a grouping attribute so if the financial plan does not group by cost type, then it will not display in the report.

- The investment must have a department OBS unit associated to it in order to create a cost plan on the investment. For a department OBS to be available to associate to an investment, you must first set up a department OBS and a location OBS (*Administration/Organization and Access-OBS*) and associate them to the investment objects (e.g., Application, Project, etc.) on which you will create financial plans. Next, you must create an entity (*Administration/Finance-Setup/Entities*) and associate the department OBS and location OBS to the entity. On the entity, you must create fiscal time periods (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) for the period types (monthly, 13 periods, quarterly, annually) that you want to reference in creating financial plans. If you don't intend to plan by annual fiscal periods, you must still create them because the report requires them as explained in the next bullet item.
- There must be fiscal time periods, with a period type of annually, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) that cover the periods for which you have investment financial plans in Clarity. For example, if you have investments with monthly or quarterly budgets or cost plans for 2012 and 2013, then you must have annual fiscal periods created for 2012 and 2013 even though you aren't creating budgets or cost plans by these annual periods. The report uses these annual periods to convert the budget and cost plan amounts entered so they may be reported by fiscal year, independent of how they are entered in the financial plans.
- There must be fiscal time periods, with a period type of monthly or 13 periods, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*). The Financial Capitalization Detail subreport displays amounts by fiscal period type of monthly or 13 periods, whichever you have set up in your system. If your financial plans are entered by period types of monthly or 13 periods, then the amounts will display in those periods in the report as they do in the financial plan. If your financial plans are entered by period types of quarterly or annually, then the amounts will display in the first month of the quarter or first month of the year, respectively. The quarter and annual amounts entered in the financial plan are not spread evenly across months in the report; they are included in the first month corresponding to the quarter or year in which the amounts are entered.
- The OBS level group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of investments to an OBS unit because the association of investments to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added investments to an OBS unit, removed investments from an OBS unit, or moved investments from one OBS unit to another.

Report Definition:

Name:	Financial Capitalization by Investment
ID:	CSP_FIN_CapitalizationByInv
Description:	Financial Capitalization by Investment (CSP)
Executable Name:	/CSP/Financial Capitalization

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Fiscal Year param_year	Browse Multiple-select	Report (Fiscal Years) CSP_RPT_FIN_FISCAL_YEAR	Yes
Report Currency param_curr	Pull-down Single-select	Report (Currencies) CSP_RPT_FIN_CURRENCY	No
% Spent Threshold param_spent_thres	Text		Yes 10
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Group By 1 param_group1	Pull-down Single-select	Report (Investment Manager, Business Owner, Types, OBS Level) CSP_RPT_FIN_REVIEW_GROUP	Yes No Grouping
Group By 2 param_group2	Pull-down Single-select	Report (Investment Manager, Business Owner, Types, OBS Level) CSP_RPT_FIN_REVIEW_GROUP	Yes No Grouping
Group By 3 param_group3	Pull-down Single-select	Report (Investment Manager, Business Owner, Types, OBS Level) CSP_RPT_FIN_REVIEW_GROUP	Yes No Grouping
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved
Financial Plan Type: Budget, Planned
Group By 1, 2 and 3: No Grouping, Investment Manager, Business Owner, Investment Type, Project Type, OBS Level 1-10

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Financial Plan Type parameter allows you to select which type of financial plan to include in the report. You may run the report to display budget amounts from the budget or planned amounts from the cost plan. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

Budget	The budget amounts in the report are based on the current approved budget. The above screen captures were run with the option of planned. If they were run with the option of budget, then they would display the word budget where they display the word planned in the main report column headings and subreport row labels.
Planned	The planned amounts in the report are based on the current cost plan of record. The above screen captures display the amounts as planned because this is the parameter value selected when running the report.

- The Fiscal Year parameter allows you to control which costs, from the financial plans and actual transactions, are included in the report. When you select a fiscal year, the budget or planned amounts are restricted to only display the amounts within the fiscal year you select. The same applies to actual amounts. You may view costs for one or several fiscal years, regardless of whether the financial plans are entered by period types of monthly, 13 periods, quarterly, or annually.
- The Report Currency parameter allows you to convert the amounts in the report to one currency for reporting purposes. If you select a currency in the parameter, then the amounts in the report will be converted into that currency per the exchange rates set up in Clarity, if the report currency is different from the investment currency. If you do not select a currency in the parameter, then the report displays amounts in the entity's home currency of the department associated to the investment.

  In order to use this Report Currency parameter to convert currencies, you must have multi-currency enabled in your installation of Clarity (*Administration/Finance-Setup/Defaults*). In the Currency section, there is a System field that must be set to Multi Currency. In addition to multi-currency being enabled, you must also activate the currencies you want to use in Clarity (*Administration/Finance-Setup/Currency*). Lastly, you must set up Foreign Exchange rates in Clarity (*Administration/Finance-Setup/Foreign Exchange Rates*). The report uses exchange rates with an Exchange Rate Type of 'Average' so you must set up exchange rates of this type.
- The % Spent Threshold parameter allows you to control when the background color changes from yellow to red for the % spent columns in the report. If the % spent in the report is less or equal to 100%, then the background color will be green. If the % spent is greater than 100%, then it will be yellow until it reaches the % spent threshold entered as a parameter. Amounts that are greater than the threshold will be red. In the above screen captures, the % spent threshold parameter entered when running the report is 10%. Entering a value of 10% means that the % spent will turn red when it is greater than 110%. You should enter 10% as the threshold, not 110%.

- The report has Group By 1, 2, and 3 parameters that allow you to control how the report is grouped. You may group the report by up to three options, which may be any combination of the following grouping options:

No Grouping	This option does not group the report so you should select this value if you do not want to do a grouping for one of the group by options.
Investment Manager	This option groups the report by investment manager.
Business Owner	This option groups the report by business owner.
Investment Type	This option groups the report by investment type. The values for investment type are: Application, Asset, Idea, Other Work, Product, Project, and Service.
Project Type	This option groups the report by project type. The values for project type are: Major Project, Application Change, and Infrastructure Deployment. The project type is a configurable lookup so values may be added, modified, or deactivated.
OBS Level 1-10	This option groups the report by OBS level and requires that you select a unit in the investment OBS parameter in order to group by an OBS level. The investment OBS parameter and grouping by an OBS level work in conjunction with one another. The investment OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the investments attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the investments by this level (e.g., OBS Level 4). If investments are associated to units above level 4 (e.g., investments are attached to levels 2 and 3), then the investments associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the investment at the level by which you are grouping. If you group by an OBS level but you do not select a unit in the investment OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the investment OBS parameter to determine which OBS to use for grouping.

Report Fields and Calculations:
The report displays the investment name, investment start date, and investment finish date. If the financial plan type parameter is set to budget, then the report displays the following columns: budget, capital budget, capital actual, capital budget remaining, capital % spent, operating budget, operating actual, operating budget remaining, and operating % spent. For budgets, the report only includes the current approved budget amounts.

If the financial plan type parameter is set to planned, then the report displays the following columns: planned, capital planned, capital actual, capital planned remaining, capital % spent, operating planned, operating actual, operating planned remaining, and operating % spent. For planned, the report only includes the current plan of record cost plan amounts.

If the report currency parameter is not selected, then the report will display all investments in their home currency. This is the entity's home currency of the department associated to the investment. In this case, an extra currency column displays in the report to the right of the investment name to give visibility into the currency of the investment because the investments may be in different currencies. If the report currency parameter is set to a currency, then all of the investments in the report will be converted from their home currency to the report currency, if the two are different, so you may view all investments in the same currency. In this case, the currency is displayed in parentheses in the report title instead of as a column in the report because all of the investments are in the same report currency. In order to use the report currency parameter for converting amounts, your Clarity installation must have multi-currency enabled. Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.

This report contains the following calculations, which are all subject to the fiscal year parameter:

Budget or Planned	This is the approved budget or planned cost for the cost plan of record.
Capital Budget or Planned	Budget or Planned Cost where the Cost Type ID is 'CAPITAL'
Capital Actual	Actual Cost where the Cost Type ID is 'CAPITAL'
Capital Budget or Planned Remaining	Capital Budget or Planned – Capital Actual
Capital % Spent	(Capital Actual / Capital Budget or Planned) x 100 **Capital % Spent background color is determined as follows:** Green — The % Spent is less than or equal to 100%. Yellow — The % Spent is greater than 100% and it exceeds 100% by a value that is less than or equal to the % Spent threshold entered as a parameter. Red — The % Spent is greater than 100% and it exceeds 100% by a value that is greater than the % Spent threshold entered as a parameter.
Operating Budget or Planned	Budget or Planned Cost where the Cost Type ID is 'OPERATING'
Operating Actual	Actual Cost where the Cost Type ID is 'OPERATING'
Operating Budget or Planned Remaining	Operating Budget or Planned – Operating Actual
Operating % Spent	(Operating Actual / Operating Budget or Planned) x 100 **Operating % Spent background color is determined as follows:** Green — The % Spent is less than or equal to 100%. Yellow — The % Spent is greater than 100% and it exceeds 100% by a value that is less than or equal to the % Spent threshold entered as a parameter. Red — The % Spent is greater than 100% and it exceeds 100% by a value that is greater than the % Spent threshold entered as a parameter.

Subreport Fields and Calculations:

The subreport is for one investment and it displays budget or planned, actual and remaining cost amounts grouped by cost type and transaction type. The financial plan type parameter determines if the subreport displays budget or planned, same as with the main report. If there are labor actual costs in at least one period, the subreport displays an actual detail section that shows the actual labor cost amounts by resource. The subreport shows all cost amounts by fiscal period type of monthly or 13 periods, depending upon the fiscal period type you have set up for the investment's entity. It also displays a total for the fiscal year. If the report is run for more than one fiscal year, then there is a page break in the subreport for each fiscal year so each fiscal year begins on a new page.

The remaining amounts have a green background color if they are positive numbers or zero because this means that budget or planned exceeds actual. The remaining amounts have a background color of red if they are negative numbers because this means that actuals exceed budget or planned.

Report Security and Technical Details:

Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
This report requires cost types with IDs of 'CAPITAL' and 'OPERATING'.	cmn_lookups.lookup_code = 'CAPITAL' OR cmn_lookups.lookup_code = 'OPERATING'	Cost types of Capital and Operating are automatically created with the installation of Clarity; it is not necessary to create these manually. Financial plans must be grouped by cost type in order for amounts to display in this report.
The current approved budget or cost plan of record is the only financial plan included.	fin_plans.is_plan_of_record = 1	The plan of record for the cost plan is the one designated as plan of record. The plan of record for the budget is current approved budget.
Budget and cost plans are included.	fin_plans.sub_plan_type = 0	Benefit plans are excluded (fin_plans.sub_plan_type = 1). The financial plans table has cost plan, budget, and benefit plan records.
Actual financial transaction cost amounts only include transactions processed and posted.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.
Actual financial transaction cost amounts are in the currency that is the entity's home currency of the department associated to the investment.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to an investment, the investment home currency is determined by the entity's home currency for the department.

Topic	Database Statement	Additional Explanation
Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.	FIN_CONVERT_CURRENCY_FCT(NVL(bgt.budget_amt,0),'AVERAGE',SYSDATE,i.currency_code,NVL('{?param_curr}',i.currency_code)) bgt.budget_amt = SUM(ROUND(odf_ssl_cst_dtl_cost.slice * (odf_ssl_cst_dtl_cost.finish_date - odf_ssl_cst_dtl_cost.start_date),2))	The Foreign Exchange rates (*Administration/Finance-Setup/Foreign Exchange Rates*) must be set up with an Exchange Rate Type of 'Average' because this is the type the report references.
The OBS unit name, displayed when the report is grouped by an OBS level, is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND (prj_obs_associations.table_name = 'SRM_PROJECTS' OR prj_obs_associations.table_name LIKE 'INV%')	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.
The Financial Plan insta-slice table is referenced for the budget and planned amounts because the amounts are displayed by fiscal period.	prj_blb_slicerequests.request_name = 'costplandetail::cost::segment' AND prj_blb_slicerequests.id = odf_ssl_cst_dtl_cost.slice_request_id AND odf_ssl_cst_dtl_cost.prj_object_id = fin_cost_plan_details.id	Financial plan data is stored in the insta-slice tables so this table must be queried for amounts if reporting by period. The main report displays amounts based on the fiscal year parameter selected. The subreport displays amounts by month or 13 period fiscal period type, based on the fiscal year parameter selected.

Financial Forecast Review by Investment

The Financial Forecast Review by Investment report displays budget or planned, actual, and forecast cost amounts with variances for each investment. The report offers the ability to group by up to three options, which may be any combination of the following: Investment Manager, Business Owner, Investment Type, Project Type, and OBS Level. This report also allows you to drill down to the Financial Forecast Detail Review subreport, by clicking on an investment name, to view amounts by financial plan grouping attributes.

Financial Forecast Review by Investment (USD)

Investment	Start Date	Finish Date	Budget	Actual To Date	Budget Remaining	% Spent	Forecast (Calculated)	Forecast Remaining	Budget to Forecast Variance	% of Budget
Quinn, Randy										
Client Services Application	2/1/2012	8/31/2012	214,800.00	0.00	214,800.00	0.00	128,400.00	128,400.00	86,400.00	59.78
eCommerce Portal	10/4/2011	10/8/2012	368,300.00	6,000.00	362,300.00	1.63	299,300.00	293,300.00	69,000.00	81.27
Global Expense Application	1/2/2012	12/29/2012	837,000.00	5,250.00	831,750.00	0.63	690,650.00	685,400.00	146,350.00	82.51
Online Customer Release	4/3/2012	8/3/2012	270,400.00	0.00	270,400.00	0.00	270,400.00	270,400.00	0.00	100.00
Online Order Entry	1/2/2012	8/26/2012	600,000.00	62,880.00	537,120.00	10.48	724,880.00	662,000.00	-124,880.00	120.81
Online Orders	12/12/2011	8/27/2012	378,400.00	89,714.30	288,685.70	23.71	318,114.30	228,400.00	60,285.70	84.07
Quinn, Randy Total			**2,668,900.00**	**163,844.30**	**2,505,055.70**	**6.14**	**2,431,744.30**	**2,267,900.00**	**237,155.70**	**91.11**
Roberts, Beth										
Credit Card Processing	1/2/2012	3/5/2012	130,400.00	5,600.00	124,800.00	4.29	5,600.00	0.00	124,800.00	4.29
CRM Contact Center	10/3/2011	2/27/2012	105,760.00	45,200.00	60,560.00	42.74	45,200.00	0.00	60,560.00	42.74
CRM Enhancements	11/3/2011	8/26/2012	143,840.00	25,200.00	118,640.00	17.52	25,200.00	0.00	118,640.00	17.52
Global Order Processing	3/6/2012	8/17/2012	434,000.00	0.00	434,000.00	0.00	451,080.00	451,080.00	-17,080.00	103.94
Online Order Catalog	1/2/2012	3/5/2012	189,650.00	68,720.00	120,930.00	36.24	68,720.00	0.00	120,930.00	36.24
Online Order Improvements	1/2/2012	9/2/2012	324,000.00	0.00	324,000.00	0.00	357,500.00	357,500.00	-33,500.00	110.34
Online System Enhancements	9/1/2011	8/31/2013	1,065,160.00	324,160.00	741,000.00	30.43	1,159,160.00	835,000.00	-94,000.00	108.82
Order Management	9/5/2011	8/24/2012	183,300.00	0.00	183,300.00	0.00	183,300.00	183,300.00	0.00	100.00
Order Trending Analysis	2/1/2012	5/22/2012	258,400.00	0.00	258,400.00	0.00	164,160.00	164,160.00	94,240.00	63.53
Web Application Enhancement	1/2/2012	9/2/2012	232,900.00	0.00	232,900.00	0.00	232,900.00	232,900.00	0.00	100.00
Roberts, Beth Total			**3,067,410.00**	**468,880.00**	**2,598,530.00**	**15.29**	**2,692,820.00**	**2,223,940.00**	**374,590.00**	**87.79**
Tanner, Paul										
HR Claims Automation	3/6/2012	12/3/2012	374,380.00	0.00	374,380.00	0.00	374,380.00	374,380.00	0.00	100.00
HR Claims Enhancement	2/1/2012	5/22/2012	258,400.00	0.00	258,400.00	0.00	164,160.00	164,160.00	94,240.00	63.53
PCI Controls Remediation	2/1/2012	8/25/2012	660,160.00	33,600.00	626,560.00	5.09	596,560.00	562,960.00	63,600.00	90.37
Security Compliance	1/2/2012	2/2/2012	844,400.00	0.00	844,400.00	0.00	500,000.00	500,000.00	344,400.00	59.21
Security Enhancements	4/3/2012	12/23/2012	418,400.00	0.00	418,400.00	0.00	418,400.00	418,400.00	0.00	100.00
XPL Translations	3/5/2012	6/22/2012	710,000.00	0.00	710,000.00	0.00	628,400.00	628,400.00	81,600.00	88.51
Tanner, Paul Total			**3,265,740.00**	**33,600.00**	**3,232,140.00**	**1.03**	**2,681,900.00**	**2,648,300.00**	**583,840.00**	**82.12**
Grand Total			**9,002,050.00**	**666,324.30**	**8,335,725.70**	**7.40**	**7,806,464.30**	**7,140,140.00**	**1,195,585.70**	**86.72**

Report Example 1: Grouped by Business Owner

The below report example is grouped by two, of the possible three, grouping options. It is grouped first by OBS Level and second by Business Owner. The grouping options are fairly flexible, allowing you to summarize the data and subtotal it by a variety of grouping attributes including: Investment Manager, Business Owner, Investment Type, Project Type, and OBS Level. These grouping options may be applied in any order so, for example, you may group first by OBS Level, second by Investment Type, and third by Investment Manager. Alternatively, you may group first by Investment Type, second by Investment Manager, and third by OBS Level. You may also group by one attribute or three attributes, offering a wide range of grouping and subtotaling options.

Financial Forecast Review by Investment (USD)

Investment	Start Date	Finish Date	Budget	Actual To Date	Budget Remaining	% Spent	Forecast (Calculated)	Forecast Remaining	Budget to Forecast Variance	% of Budget
Application Management										
Quinn, Randy										
Client Services Application	2/1/2012	8/31/2012	214,800.00	0.00	214,800.00	0.00	128,400.00	128,400.00	86,400.00	59.78
Global Expense Application	1/2/2012	12/29/2012	837,000.00	5,250.00	831,750.00	0.63	690,650.00	685,400.00	146,350.00	82.51
Quinn, Randy Total			**1,051,800.00**	**5,250.00**	**1,046,550.00**	**0.50**	**819,050.00**	**813,800.00**	**232,750.00**	**77.87**
Application Management Total			**1,051,800.00**	**5,250.00**	**1,046,550.00**	**0.50**	**819,050.00**	**813,800.00**	**232,750.00**	**77.87**
Internal Initiatives										
Tanner, Paul										
HR Claims Automation	3/6/2012	12/3/2012	374,380.00	0.00	374,380.00	0.00	374,380.00	374,380.00	0.00	100.00
HR Claims Enhancement	2/1/2012	5/22/2012	258,400.00	0.00	258,400.00	0.00	164,160.00	164,160.00	94,240.00	63.53
Tanner, Paul Total			**632,780.00**	**0.00**	**632,780.00**	**0.00**	**538,540.00**	**538,540.00**	**94,240.00**	**85.11**
Internal Initiatives Total			**632,780.00**	**0.00**	**632,780.00**	**0.00**	**538,540.00**	**538,540.00**	**94,240.00**	**85.11**
Online Order Management										
Quinn, Randy										
eCommerce Portal	10/4/2011	10/8/2012	368,300.00	6,000.00	362,300.00	1.63	299,300.00	293,300.00	69,000.00	81.27
Online Customer Release	4/3/2012	8/3/2012	270,400.00	0.00	270,400.00	0.00	270,400.00	270,400.00	0.00	100.00
Online Order Entry	1/2/2012	8/26/2012	600,000.00	62,880.00	537,120.00	10.48	724,880.00	662,000.00	-124,880.00	120.81
Online Orders	12/12/2011	8/27/2012	378,400.00	89,714.30	288,685.70	23.71	318,114.30	228,400.00	60,285.70	84.07
Quinn, Randy Total			**1,617,100.00**	**158,594.30**	**1,458,505.70**	**9.81**	**1,612,694.30**	**1,454,100.00**	**4,405.70**	**99.73**
Roberts, Beth										
Credit Card Processing	1/2/2012	3/5/2012	130,400.00	5,600.00	124,800.00	4.29	5,600.00	0.00	124,800.00	4.29
CRM Contact Center	10/3/2011	2/27/2012	105,760.00	45,200.00	60,560.00	42.74	45,200.00	0.00	60,560.00	42.74
CRM Enhancements	11/3/2011	8/26/2012	143,840.00	25,200.00	118,640.00	17.52	25,200.00	0.00	118,640.00	17.52
Online Order Catalog	1/2/2012	3/5/2012	189,650.00	68,720.00	120,930.00	36.24	68,720.00	0.00	120,930.00	36.24
Online Order Improvements	1/2/2012	9/2/2012	324,000.00	0.00	324,000.00	0.00	357,500.00	357,500.00	-33,500.00	110.34
Online System Enhancements	9/1/2011	8/31/2013	1,065,160.00	324,160.00	741,000.00	30.43	1,159,160.00	835,000.00	-94,000.00	108.82
Web Application Enhancement	1/2/2012	9/2/2012	232,900.00	0.00	232,900.00	0.00	232,900.00	232,900.00	0.00	100.00
Roberts, Beth Total			**2,191,710.00**	**468,880.00**	**1,722,830.00**	**21.39**	**1,894,280.00**	**1,425,400.00**	**297,430.00**	**86.43**
Online Order Management Total			**3,808,810.00**	**627,474.30**	**3,181,335.70**	**16.47**	**3,506,974.30**	**2,879,500.00**	**301,835.70**	**92.08**
Grand Total			**5,493,390.00**	**632,724.30**	**4,860,665.70**	**11.52**	**4,864,564.30**	**4,231,840.00**	**628,825.70**	**88.55**

Report Example 2: Grouped by Organizational Breakdown Structure (OBS) and Business Owner

Financial Forecast Detail Review Subreport

The Financial Forecast Detail Review subreport displays the budget or planned, actual and remaining amounts grouped by up to two financial plan grouping attributes. The report has parameters for you to select the financial plan group by attributes when you run the report and you may select any of the attributes supported as financial plan grouping attributes.

Financial Forecast Detail Review (USD)

Online Order Improvements

Cost Type/Transaction Class	Budget	Actual To Date	Budget Remaining	% Spent	Forecast (Calculated)	Forecast Remaining	Budget to Forecast Variance	% of Budget
Capital								
Internal Labor	125,000.00	0.00	125,000.00	0.00	150,000.00	150,000.00	-25,000.00	120.00
License Cost	60,000.00	0.00	60,000.00	0.00	75,000.00	75,000.00	-15,000.00	125.00
Total	**185,000.00**	**0.00**	**185,000.00**	**0.00**	**225,000.00**	**225,000.00**	**-40,000.00**	**121.62**
Operating								
External Labor	40,000.00	0.00	40,000.00	0.00	45,000.00	45,000.00	-5,000.00	112.50
Internal Labor	51,000.00	0.00	51,000.00	0.00	52,000.00	52,000.00	-1,000.00	101.96
Lease Costs	10,000.00	0.00	10,000.00	0.00	7,500.00	7,500.00	2,500.00	75.00
Material	6,000.00	0.00	6,000.00	0.00	4,000.00	4,000.00	2,000.00	66.67
Travel	32,000.00	0.00	32,000.00	0.00	24,000.00	24,000.00	8,000.00	75.00
Total	**139,000.00**	**0.00**	**139,000.00**	**0.00**	**132,500.00**	**132,500.00**	**6,500.00**	**95.32**
Grand Total	**324,000.00**	**0.00**	**324,000.00**	**0.00**	**357,500.00**	**357,500.00**	**-33,500.00**	**110.34**

Report Example 1: Financial Plan Grouped by Cost Type and Transaction Class

Financial Forecast Detail Review (USD)

Online Order Improvements

Cost Type/Role	Budget	Actual To Date	Budget Remaining	% Spent	Forecast (Calculated)	Forecast Remaining	Budget to Forecast Variance	% of Budget
Capital								
Architect	40,000.00	0.00	40,000.00	0.00	75,000.00	75,000.00	-35,000.00	187.50
Developer	65,000.00	0.00	65,000.00	0.00	60,000.00	60,000.00	5,000.00	92.31
Material	60,000.00	0.00	60,000.00	0.00	75,000.00	75,000.00	-15,000.00	125.00
Storage Architect	20,000.00	0.00	20,000.00	0.00	15,000.00	15,000.00	5,000.00	75.00
Total	**185,000.00**	**0.00**	**185,000.00**	**0.00**	**225,000.00**	**225,000.00**	**-40,000.00**	**121.62**
Operating								
Business Analyst	16,000.00	0.00	16,000.00	0.00	12,000.00	12,000.00	4,000.00	75.00
Equipment	10,000.00	0.00	10,000.00	0.00	7,500.00	7,500.00	2,500.00	75.00
Material	6,000.00	0.00	6,000.00	0.00	4,000.00	4,000.00	2,000.00	66.67
Project Manager	35,000.00	0.00	35,000.00	0.00	40,000.00	40,000.00	-5,000.00	114.29
Test Engineer	40,000.00	0.00	40,000.00	0.00	45,000.00	45,000.00	-5,000.00	112.50
Travel Expenses	32,000.00	0.00	32,000.00	0.00	24,000.00	24,000.00	8,000.00	75.00
Total	**139,000.00**	**0.00**	**139,000.00**	**0.00**	**132,500.00**	**132,500.00**	**6,500.00**	**95.32**
Grand Total	**324,000.00**	**0.00**	**324,000.00**	**0.00**	**357,500.00**	**357,500.00**	**-33,500.00**	**110.34**

Report Example 2: Financial Plan Grouped by Cost Type and Role

Report Prerequisites:

- The investment must have at least one financial plan for the investment to display in the report. The report has a financial plan type parameter with the values of budget or planned so you may run the report for budget or cost plan amounts. If the financial plan type parameter is budget, then the investment must have at least one approved budget for the investment to display in the report. If the financial plan type parameter is planned, then the investment must have at least one cost plan for the investment to display in the report.
- The investment must have a department OBS unit associated to it in order to create a cost plan on the investment. For a department OBS to be available to associate to an investment, you must first set up a department OBS and a location OBS (*Administration/Organization and Access-OBS*) and associate them to the investment objects (e.g., Application, Project, etc.) on which you will create financial plans. Next, you must create an entity (*Administration/Finance-Setup/Entities*) and associate the department OBS and location OBS to the entity. On the entity, you must create fiscal time periods (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) for the period types (monthly, 13 periods, quarterly, annually) that you want to reference in creating financial plans. If you don't intend to plan by annual fiscal periods, you must still create them because the report requires them as explained in the next bullet item.
- There must be fiscal time periods, with a period type of annually, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) that cover the periods for which you have investment financial plans in Clarity. For example, if you have investments with monthly or quarterly budgets or cost plans for 2012 and 2013, then you must have annual fiscal periods created for 2012 and 2013 even though you aren't creating budgets or cost plans by these annual periods. The report uses these annual periods to convert the budget and cost plan amounts entered so they may be reported by fiscal year, independent of how they are entered in the financial plans.
- There must be fiscal time periods, with a period type of monthly or 13 periods, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*). There is an as of date parameter that is evaluated to the end of the fiscal period in which it falls, by comparing it to fiscal periods with a type of monthly or 13 periods, whichever you have set up in your system. If you do not have fiscal periods with a type of monthly or 13 periods, then the report will not be able to evaluate the as of date parameter to a fiscal period to calculate actuals to date and forecast (calculated).
- The OBS level group by options are dependent upon the data mart OBS table (nbi_dim_obs) being populated with the OBS unit names for each OBS level. This table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or by running the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified. For example, you need to run one of these jobs if an OBS unit is moved from one level in the OBS to another level.

  One of these jobs does not need to be run if you have modified associations of investments to an OBS unit because the association of investments to the OBS is not dependent upon the data mart OBS table. For example, you do not need to run one of these jobs if you added investments to an OBS unit, removed investments from an OBS unit, or moved investments from one OBS unit to another.

Report Definition:

Name:	Financial Forecast Review by Investment
ID:	CSP_FIN_ForecastReviewByInv
Description:	Financial Forecast Review by Investment (CSP)
Executable Name:	/CSP/Financial Forecast Review

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Fiscal Year param_year	Browse Multiple-select	Report (Fiscal Years) CSP_RPT_FIN_FISCAL_YEAR	Yes
As of Date param_as_of	Relative Date		Yes End of Previous Month
Report Currency param_curr	Pull-down Single-select	Report (Currencies) CSP_RPT_FIN_CURRENCY	No
% Spent Threshold param_spent_thres	Text		Yes 10
% of Plan Type Threshold param_bgt_thres	Text		Yes 10
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Group By 1 param_group1	Pull-down Single-select	Report (Investment Manager, Business Owner, Types, OBS Level) CSP_RPT_FIN_REVIEW_GROUP	Yes No Grouping
Group By 2 param_group2	Pull-down Single-select	Report (Investment Manager, Business Owner, Types, OBS Level) CSP_RPT_FIN_REVIEW_GROUP	Yes No Grouping
Group By 3 param_group3	Pull-down Single-select	Report (Investment Manager, Business Owner, Types, OBS Level) CSP_RPT_FIN_REVIEW_GROUP	Yes No Grouping
Financial Plan Group By 1 param_f_grp	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	Yes

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Financial Plan Group By 2 param_f_subgrp	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	No
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved
Financial Plan Type: Budget, Planned
Group By 1, 2 and 3: No Grouping, Investment Manager, Business Owner, Investment Type, Project Type, OBS Level 1-10
Financial Plan Group By 1 and 2: Charge Code, Cost Type, Department, Input Type Code, Location, Resource, Resource Class, Role, Transaction Class, User Value 1, User Value 2

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Financial Plan Type parameter allows you to select which type of financial plan to include in the report. You may run the report to display budget amounts from the budget or planned amounts from the cost plan. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

  Budget — The budget amounts in the report are based on the current approved budget. The above screen captures display the amounts as budget because this is the parameter value selected when running the report.

  Planned — The planned amounts in the report are based on the current cost plan of record. The above screen captures were run with the option of budget. If they were run with the option of planned, then they would display the word planned where they display the word budget in the report and subreport column headings.
- The Fiscal Year parameter allows you to control which costs, from the financial plans and actual transactions, are included in the report. When you select a fiscal year, the budget or planned amounts are restricted to only display the amounts within the fiscal year you select. The same applies to actual amounts. You may view costs for one or several fiscal years, regardless of whether the financial plans are entered by period types of monthly, 13 periods, quarterly, or annually.
- The As of Date parameter allows you to enter the fiscal period finish date that will be used to calculate the actual to date and forecast (calculated) cost amounts in the report. You should enter a date that is the end of a fiscal period in this parameter. If you enter a date that is not the finish date of a fiscal period, then the report will determine which fiscal period the date you enter resides and it will use the finish date of that fiscal period for the report calculations. The report looks at fiscal periods with a period type of monthly or 13 periods when it determines the finish date this way.

- The Report Currency parameter allows you to convert the amounts in the report to one currency for reporting purposes. If you select a currency in the parameter, then the amounts in the report will be converted into that currency per the exchange rates set up in Clarity, if the report currency is different from the investment currency. If you do not select a currency in the parameter, then the report displays amounts in the entity's home currency of the department associated to the investment.

  In order to use this Report Currency parameter to convert currencies, you must have multi-currency enabled in your installation of Clarity (*Administration/Finance-Setup/Defaults*). In the Currency section, there is a System field that must be set to Multi Currency. In addition to multi-currency being enabled, you must also activate the currencies you want to use in Clarity (*Administration/Finance-Setup/Currency*). Lastly, you must set up Foreign Exchange rates in Clarity (*Administration/Finance-Setup/Foreign Exchange Rates*). The report uses exchange rates with an Exchange Rate Type of 'Average' so you must set up exchange rates of this type.
- The % Spent Threshold parameter allows you to control when the background color changes from yellow to red for the % spent column in the report. If the % spent in the report is less or equal to 100%, then the background color will be green. If the % spent is greater than 100%, then it will be yellow until it reaches the % spent threshold entered as a parameter. Amounts that are greater than the threshold will be red. In the above screen captures, the % spent threshold parameter entered when running the report is 10%. Entering a value of 10% means that the % spent will turn red when it is greater than 110%. You should enter 10% as the threshold, not 110%.
- The % of Plan Type Threshold parameter allows you to control when the background color changes from yellow to red for the % of budget or planned column in the report. If the % of budget or planned in the report is less or equal to 100%, then the background color will be green. If the % of budget or planned is greater than 100%, then it will be yellow until it reaches the % of plan type threshold entered as a parameter. Amounts that are greater than the threshold will be red. In the above screen captures, the % of plan type threshold parameter entered when running the report is 10%. Entering a value of 10% means that the % of budget or planned will turn red when it is greater than 110%. You should enter 10% as the threshold, not 110%.
- The report has Group By 1, 2, and 3 parameters that allow you to control how the report is grouped. You may group the report by up to three options, which may be any combination of the following grouping options:

No Grouping	This option does not group the report so you should select this value if you do not want to do a grouping for one of the group by options.
Investment Manager	This option groups the report by investment manager.
Business Owner	This option groups the report by business owner.
Investment Type	This option groups the report by investment type. The values for investment type are: Application, Asset, Idea, Other Work, Product, Project, and Service.
Project Type	This option groups the report by project type. The values for project type are: Major Project, Application Change, and Infrastructure Deployment. The Project Type is a configurable lookup so values may be added, modified, or deactivated.

OBS Level 1-10	This option groups the report by OBS level and requires that you select a unit in the investment OBS parameter in order to group by an OBS level. The investment OBS parameter and grouping by an OBS level work in conjunction with one another. The investment OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the investments attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the investments by this level (e.g., OBS Level 4). If investments are associated to units above level 4 (e.g., investments are attached to levels 2 and 3), then the investments associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the investment at the level by which you are grouping. If you group by an OBS level but you do not select a unit in the investment OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the investment OBS parameter to determine which OBS to use for grouping.

- The report has Financial Plan Group By 1 and Financial Plan Group By 2 parameters that allow you to control how the subreport is grouped. You may group the subreport by up to two options, which may be any combination of the following grouping options:

Charge Code	This option groups the subreport by charge code.
Cost Type	This option groups the subreport by cost type.
Department	This option groups the subreport by department.
Input Type Code	This option groups the subreport by input type code.
Location	This option groups the subreport by location.
Resource	This option groups the subreport by resource.
Resource Class	This option groups the subreport by resource class.
Role	This option groups the subreport by role.
Transaction Class	This option groups the subreport by transaction class.
User Value 1	This option groups the subreport by user value 1.
User Value 2	This option groups the subreport by user value 2.

Report Fields and Calculations:

The report displays the investment name, investment start date, and investment finish date. If the financial plan type parameter is set to budget, then the report displays the following columns: budget, actual to date, budget remaining, % spent, forecast (calculated), forecast remaining, budget to forecast variance, and % of budget. For budgets, the report only includes the current approved budget amounts.

If the financial plan type parameter is set to planned, then the report displays the following columns: planned, actual to date, planned remaining, % spent, forecast (calculated), forecast remaining, planned to forecast variance, and % of planned. For planned, the report only includes the current plan of record cost plan amounts.

If the report currency parameter is not selected, then the report will display all investments in their home currency. This is the entity's home currency of the department associated to the investment. In this case, an extra currency column displays in the report to the right of the investment name to give visibility into the currency of the investment because the investments may be in different currencies. If the report currency parameter is set to a currency, then all of the investments in the report will be converted from their home currency to the report currency, if the two are different, so you may view all investments in the same currency. In this case, the currency is displayed in parentheses in the report title instead of as a column in the report because all of the investments are in the same report currency. In order to use the report currency parameter for converting amounts, your Clarity installation must have multi-currency enabled. Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.

This report contains the following calculations, which are all subject to the fiscal year parameter:

Budget or Planned

This is the approved budget or planned cost for the cost plan of record.

Actual To Date

This is the actual cost in fiscal periods prior to the date entered in the as of date parameter. For example, if as of date parameter is 05/31/2012, then the actual to date is the actual cost thru the fiscal period ending 05/31/2012.

Budget or Planned Remaining

Budget or Planned – Actual To Date

% Spent

(Actual To Date / Budget or Planned) x 100

% Spent background color is determined as follows:

Green	The % Spent is less than or equal to 100%.
Yellow	The % Spent is greater than 100% and it exceeds 100% by a value that is less than or equal to the % Spent threshold entered as a parameter.
Red	The % Spent is greater than 100% and it exceeds 100% by a value that is greater than the % Spent threshold entered as a parameter.

Forecast (Calculated)

Actual To Date + Forecast Remaining

Forecast Remaining

This is the planned cost in the cost plan of record after the date entered in the as of date parameter. For example, if the as of date parameter is 05/31/2012, then forecast remaining is planned cost in fiscal periods after the fiscal period ending 05/31/2012.

Budget or Planned to Forecast Variance

Budget or Planned – Forecast (Calculated)

% of Budget or Planned

(Forecast (Calculated) / Budget or Planned) x 100

% of Budget or Planned background color is as follows:

Green	The % of Budget or Planned is less than or equal to 100%.
Yellow	The % of Budget or Planned is greater than 100% and it exceeds 100% by a value that is less than or equal to the % of Plan Type threshold entered as a parameter.
Red	The % of Budget or Planned is greater than 100% and it exceeds 100% by a value that is greater than the % of Plan Type threshold entered as a parameter.

Subreport Fields and Calculations:
The subreport is for one investment and it displays the same columns, with the same calculations, as the main report with a few exceptions. The first exception is that the subreport does not display the investment start and finish dates. The other exception is that the first column of the subreport is determined by the values selected in the financial plan group by 1 and financial plan group by 2 parameters. The above screen captures show two examples of running the subreport with different financial plan group by options.

Report Security and Technical Details:
Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
The current approved budget or cost plan of record is the only financial plan included.	fin_plans.is_plan_of_record = 1	The plan of record for the cost plan is the one designated as plan of record. The plan of record for the budget is current approved budget.
Budget and cost plans are included.	fin_plans.sub_plan_type = 0	Benefit plans are excluded (fin_plans.sub_plan_type = 1). The financial plans table has cost plan, budget, and benefit plan records.
Actual financial transaction cost amounts only include transactions processed and posted.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.
Actual financial transaction cost amounts are in the currency that is the entity's home currency of the department associated to the investment.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to an investment, the investment home currency is determined by the entity's home currency for the department.
Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.	FIN_CONVERT_CURRENCY_FCT(NVL(SUM(ROUND(odf_ssl_cst_dtl_cost.slice * (odf_ssl_cst_dtl_cost.finish_date - odf_ssl_cst_dtl_cost.start_date),2)) 'AVERAGE',SYSDATE,i.currency_code,NVL('{ ?param_curr}',i.currency_code))	The Foreign Exchange rates (*Administration/Finance-Setup/Foreign Exchange Rates*) must be set up with an Exchange Rate Type of 'Average' because this is the type the report references.

Topic	Database Statement	Additional Explanation
The OBS unit name, displayed when the report is grouped by an OBS level, is determined by the data mart OBS table.	prj_obs_associations.unit_id = nbi_dim_obs.obs_unit_id AND (prj_obs_associations.table_name = 'SRM_PROJECTS' OR prj_obs_associations.table_name LIKE 'INV%')	The data mart OBS table is populated by running the *Update Business Objects Report Tables* job with the update OBS option checked or the *Datamart Extraction* job. One of these jobs must be run when an OBS unit is created, deleted, renamed, or any of the OBS unit relationships are modified.
The Financial Plan insta-slice table is referenced for the budget and planned amounts because these amounts are calculated based on the fiscal year parameter.	prj_blb_slicerequests.request_name = 'costplandetail::cost::segment' AND prj_blb_slicerequests.id = odf_ssl_cst_dtl_cost.slice_request_id AND odf_ssl_cst_dtl_cost.prj_object_id = fin_cost_plan_details.id	Financial plan data is stored in the insta-slice tables so this table must be queried for amounts if the report has a fiscal period parameter. The main report and subreport display amounts based on the fiscal year parameter selected.

Financial Forecast Review by Plan Grouping

The Financial Forecast Review by Plan Grouping report displays budget or planned, actual, and forecast cost amounts with variances for each investment, grouped by up to two financial plan grouping attributes. The report has parameters for you to select the financial plan group by attributes when you run the report and you may select any of the attributes supported as financial plan grouping attributes.

Financial Forecast Review by Plan Grouping (USD)

Investment	Start Date	Finish Date	Budget	Actual To Date	Budget Remaining	% Spent	Forecast (Calculated)	Forecast Remaining	Budget to Forecast Variance	% of Budget
Capital										
External Labor										
eBusiness Network	12/1/2012	12/31/2013	949,820.00	149,754.00	800,066.00	15.77	1,139,784.00	990,030.00	-189,964.00	120.00
Global Expense Application	11/1/2012	3/29/2014	605,220.00	28,500.00	576,720.00	4.71	633,720.00	605,220.00	-28,500.00	104.71
Mobile Commerce	12/1/2012	1/19/2014	905,000.00	0.00	905,000.00	0.00	905,000.00	905,000.00	0.00	100.00
Online Order Catalog	12/1/2012	1/31/2014	2,138,500.00	140,300.00	1,998,200.00	6.56	2,307,300.00	2,167,000.00	-168,800.00	107.89
External Labor Total			**4,598,540.00**	**318,554.00**	**4,279,986.00**	**6.93**	**4,985,804.00**	**4,667,250.00**	**-387,264.00**	**108.42**
Internal Labor										
eBusiness Network	12/1/2012	12/31/2013	1,022,500.00	42,250.00	980,250.00	4.13	1,086,200.00	1,043,950.00	-63,700.00	106.23
Global Expense Application	11/1/2012	3/29/2014	1,795,700.00	0.00	1,795,700.00	0.00	1,795,700.00	1,795,700.00	0.00	100.00
Mobile Commerce	12/1/2012	1/19/2014	1,502,000.00	180,240.00	1,321,760.00	12.00	1,682,240.00	1,502,000.00	-180,240.00	112.00
Online Order Catalog	12/1/2012	1/31/2014	6,522,400.00	0.00	6,522,400.00	0.00	6,522,400.00	6,522,400.00	0.00	100.00
Internal Labor Total			**10,842,600.00**	**222,490.00**	**10,620,110.00**	**2.05**	**11,086,540.00**	**10,864,050.00**	**-243,940.00**	**102.25**
Software										
Global Expense Application	11/1/2012	3/29/2014	33,550.00	1,700.00	31,850.00	5.07	35,250.00	33,550.00	-1,700.00	105.07
Online Order Catalog	12/1/2012	1/31/2014	145,800.00	4,375.00	141,425.00	3.00	150,175.00	145,800.00	-4,375.00	103.00
Software Total			**179,350.00**	**6,075.00**	**173,275.00**	**3.39**	**185,425.00**	**179,350.00**	**-6,075.00**	**103.39**
Capital Total			**15,620,490.00**	**547,119.00**	**15,073,371.00**	**3.50**	**16,257,769.00**	**15,710,650.00**	**-637,279.00**	**104.08**
Operating										
Internal Labor										
eBusiness Network	12/1/2012	12/31/2013	170,000.00	18,700.00	151,300.00	11.00	188,700.00	170,000.00	-18,700.00	111.00
Global Expense Application	11/1/2012	3/29/2014	1,339,500.00	43,185.00	1,296,315.00	3.22	1,382,685.00	1,339,500.00	-43,185.00	103.22
Mobile Commerce	12/1/2012	1/19/2014	370,000.00	0.00	370,000.00	0.00	370,000.00	370,000.00	0.00	100.00
Online Order Catalog	12/1/2012	1/31/2014	1,222,500.00	56,000.00	1,166,500.00	4.58	1,294,000.00	1,238,000.00	-71,500.00	105.85
Internal Labor Total			**3,102,000.00**	**117,885.00**	**2,984,115.00**	**3.80**	**3,235,385.00**	**3,117,500.00**	**-133,385.00**	**104.30**
Maintenance										
Global Expense Application	11/1/2012	3/29/2014	90,000.00	0.00	90,000.00	0.00	90,000.00	90,000.00	0.00	100.00
Maintenance Total			**90,000.00**	**0.00**	**90,000.00**	**0.00**	**90,000.00**	**90,000.00**	**0.00**	**100.00**
Operating Total			**3,192,000.00**	**117,885.00**	**3,074,115.00**	**3.69**	**3,325,385.00**	**3,207,500.00**	**-133,385.00**	**104.18**
Grand Total			**18,812,490.00**	**665,004.00**	**18,147,486.00**	**3.53**	**19,583,154.00**	**18,918,150.00**	**-770,664.00**	**104.10**

Report Prerequisites:

- The investment must have at least one financial plan for the investment to display in the report. The report has a financial plan type parameter with the values of budget or planned so you may run the report for budget or cost plan amounts. If the financial plan type parameter is budget, then the investment must have at least one approved budget for the investment to display in the report. If the financial plan type parameter is planned, then the investment must have at least one cost plan for the investment to display in the report.
- The investment must have a department OBS unit associated to it in order to create a cost plan on the investment. For a department OBS to be available to associate to an investment, you must first set up a department OBS and a location OBS (*Administration/Organization and Access-OBS*) and associate them to the investment objects (e.g., Application, Project, etc.) on which you will create financial plans. Next, you must create an entity (*Administration/Finance-Setup/Entities*) and associate the department OBS and location OBS to the entity. On the entity, you must create fiscal time periods (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) for the period types (monthly, 13 periods, quarterly, annually) that you want to reference in creating financial plans. If you don't intend to plan by annual fiscal periods, you must still create them because the report requires them as explained in the next bullet item.
- There must be fiscal time periods, with a period type of annually, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) that cover the periods for which you have investment financial plans in Clarity. For example, if you have investments with monthly or quarterly budgets or cost plans for 2012 and 2013, then you must have annual fiscal periods created for 2012 and 2013 even though you aren't creating budgets or cost plans by these annual periods. The report uses these annual periods to convert the budget and cost plan amounts entered so they may be reported by fiscal year, independent of how they are entered in the financial plans.
- There must be fiscal time periods, with a period type of monthly or 13 periods, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*). There is an as of date parameter that is evaluated to the end of the fiscal period in which it falls, by comparing it to fiscal periods with a type of monthly or 13 periods, whichever you have set up in your system. If you do not have fiscal periods with a type of monthly or 13 periods, then the report will not be able to evaluate the as of date parameter to a fiscal period to calculate actuals to date and forecast (calculated).

Report Definition:

Name:	Financial Forecast Review by Plan Grouping
ID:	CSP_FIN_ForecastRevByPlanGroup
Description:	Financial Forecast Review by Plan Grouping (CSP)
Executable Name:	/CSP/Financial Forecast Review by Plan Grouping

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Fiscal Year param_year	Browse Multiple-select	Report (Fiscal Years) CSP_RPT_FIN_FISCAL_YEAR	Yes
As of Date param_as_of	Relative Date		Yes End of Previous Month
Report Currency param_curr	Pull-down Single-select	Report (Currencies) CSP_RPT_FIN_CURRENCY	No
% Spent Threshold param_spent_thres	Text		Yes 10
% of Plan Type Threshold param_bgt_thres	Text		Yes 10
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Financial Plan Group By 1 param_f_grp	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	Yes
Financial Plan Group By 2 param_f_subgrp	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	No
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved
Financial Plan Type: Budget, Planned
Financial Plan Group By 1 and 2: Charge Code, Cost Type, Department, Input Type Code, Location, Resource, Resource Class, Role, Transaction Class, User Value 1, User Value 2

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Financial Plan Type parameter allows you to select which type of financial plan to include in the report. You may run the report to display budget amounts from the budget or planned amounts from the cost plan. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

Budget	The budget amounts in the report are based on the current approved budget. The above screen capture displays the amounts as budget because this is the parameter value selected when running the report.
Planned	The planned amounts in the report are based on the current cost plan of record. The above screen capture was run with the option of budget. If it were run with the option of planned, then it would display the word planned where it displays the word budget in the report column headings.

- The Fiscal Year parameter allows you to control which costs, from the financial plans and actual transactions, are included in the report. When you select a fiscal year, the budget or planned amounts are restricted to only display the amounts within the fiscal year you select. The same applies to actual amounts. You may view costs for one or several fiscal years, regardless of whether the financial plans are entered by period types of monthly, 13 periods, quarterly, or annually.
- The As of Date parameter allows you to enter the fiscal period finish date that will be used to calculate the actual to date and forecast (calculated) cost amounts in the report. You should enter a date that is the end of a fiscal period in this parameter. If you enter a date that is not the finish date of a fiscal period, then the report will determine which fiscal period the date you enter resides and it will use the finish date of that fiscal period for the report calculations. The report looks at fiscal periods with a period type of monthly or 13 periods when it determines the finish date this way.
- The Report Currency parameter allows you to convert the amounts in the report to one currency for reporting purposes. If you select a currency in the parameter, then the amounts in the report will be converted into that currency per the exchange rates set up in Clarity, if the report currency is different from the investment currency. If you do not select a currency in the parameter, then the report displays amounts in the entity's home currency of the department associated to the investment.

  In order to use this Report Currency parameter to convert currencies, you must have multi-currency enabled in your installation of Clarity (*Administration/Finance-Setup/Defaults*). In the Currency section, there is a System field that must be set to Multi Currency. In addition to multi-currency being enabled, you must also activate the currencies you want to use in Clarity (*Administration/Finance-Setup/Currency*). Lastly, you must set up Foreign Exchange rates in Clarity (*Administration/Finance-Setup/Foreign Exchange Rates*). The report uses exchange rates with an Exchange Rate Type of 'Average' so you must set up exchange rates of this type.
- The % Spent Threshold parameter allows you to control when the background color changes from yellow to red for the % spent column in the report. If the % spent in the report is less or equal to 100%, then the background color will be green. If the % spent is greater than 100%, then it will be yellow until it reaches the % spent threshold entered as a parameter. Amounts that are greater than the threshold will be red. In the above screen capture, the % spent threshold parameter entered when running the report is 10%. Entering a value of 10% means that the % spent will turn red when it is greater than 110%. You should enter 10% as the threshold, not 110%.

- The % of Plan Type Threshold parameter allows you to control when the background color changes from yellow to red for the % of budget or planned column in the report. If the % of budget or planned in the report is less or equal to 100%, then the background color will be green. If the % of budget or planned is greater than 100%, then it will be yellow until it reaches the % of plan type threshold entered as a parameter. Amounts that are greater than the threshold will be red. In the above screen capture, the % of plan type threshold parameter entered when running the report is 10%. Entering a value of 10% means that the % of budget or planned will turn red when it is greater than 110%. You should enter 10% as the threshold, not 110%.
- The report has Financial Plan Group By 1 and Financial Plan Group By 2 parameters that allow you to control how the report is grouped. You may group the report by up to two options, which may be any combination of the following grouping options:

Charge Code	This option groups the report by charge code.
Cost Type	This option groups the report by cost type.
Department	This option groups the report by department.
Input Type Code	This option groups the report by input type code.
Location	This option groups the report by location.
Resource	This option groups the report by resource.
Resource Class	This option groups the report by resource class.
Role	This option groups the report by role.
Transaction Class	This option groups the report by transaction class.
User Value 1	This option groups the report by user value 1.
User Value 2	This option groups the report by user value 2.

Report Fields and Calculations:
The report displays the investment name, investment start date, and investment finish date. If the financial plan type parameter is set to budget, then the report displays the following columns: budget, actual to date, budget remaining, % spent, forecast (calculated), forecast remaining, budget to forecast variance, and % of budget. For budgets, the report only includes the current approved budget amounts.

If the financial plan type parameter is set to planned, then the report displays the following columns: planned, actual to date, planned remaining, % spent, forecast (calculated), forecast remaining, planned to forecast variance, and % of planned. For planned, the report only includes the current plan of record cost plan amounts.

If the report currency parameter is not selected, then the report will display all investments in their home currency. This is the entity's home currency of the department associated to the investment. In this case, an extra currency column displays in the report to the right of the investment name to give visibility into the currency of the investment because the investments may be in different currencies. If the report currency parameter is set to a currency, then all of the investments in the report will be converted from their home currency to the report currency, if the two are different, so you may view all investments in the same currency. In this case, the currency is displayed in parentheses in the report title instead of as a column in the report because all of the investments are in the same report currency. In order to use the report currency parameter for converting amounts, your Clarity installation must have multi-currency enabled. Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.

This report contains the following calculations, which are all subject to the fiscal year parameter:

Budget or Planned	This is the approved budget or planned cost for the cost plan of record.
Actual To Date	This is the actual cost in fiscal periods prior to the date entered in the as of date parameter. For example, if as of date parameter is 05/31/2012, then the actual to date is the actual cost thru the fiscal period ending 05/31/2012.
Budget or Planned Remaining	Budget or Planned – Actual To Date
% Spent	(Actual To Date / Budget or Planned) x 100 **% Spent background color is determined as follows:** Green: The % Spent is less than or equal to 100%. Yellow: The % Spent is greater than 100% and it exceeds 100% by a value that is less than or equal to the % Spent threshold entered as a parameter. Red: The % Spent is greater than 100% and it exceeds 100% by a value that is greater than the % Spent threshold entered as a parameter.
Forecast (Calculated)	Actual To Date + Forecast Remaining
Forecast Remaining	This is the planned cost in the cost plan of record after the date entered in the as of date parameter. For example, if the as of date parameter is 05/31/2012, then forecast remaining is planned cost in fiscal periods after the fiscal period ending 05/31/2012.
Budget or Planned to Forecast Variance	Budget or Planned – Forecast (Calculated)
% of Budget or Planned	(Forecast (Calculated) / Budget or Planned) x 100 **% of Budget or Planned background color is as follows:** Green: The % of Budget or Planned is less than or equal to 100%. Yellow: The % of Budget or Planned is greater than 100% and it exceeds 100% by a value that is less than or equal to the % of Plan Type threshold entered as a parameter. Red: The % of Budget or Planned is greater than 100% and it exceeds 100% by a value that is greater than the % of Plan Type threshold entered as a parameter.

Report Security and Technical Details:
Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
The current approved budget or cost plan of record is the only financial plan included.	fin_plans.is_plan_of_record = 1	The plan of record for the cost plan is the one designated as plan of record. The plan of record for the budget is current approved budget.
Budget and cost plans are included.	fin_plans.sub_plan_type = 0	Benefit plans are excluded (fin_plans.sub_plan_type = 1). The financial plans table has cost plan, budget, and benefit plan records.
Actual financial transaction cost amounts only include transactions processed and posted.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.
Actual financial transaction cost amounts are in the currency that is the entity's home currency of the department associated to the investment.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to an investment, the investment home currency is determined by the entity's home currency for the department.
Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.	FIN_CONVERT_CURRENCY_FCT(NVL(SUM(ROUND(odf_ssl_cst_dtl_cost.slice * (odf_ssl_cst_dtl_cost.finish_date - odf_ssl_cst_dtl_cost.start_date),2)) 'AVERAGE',SYSDATE,i.currency_code,NVL('{ ?param_curr}',i.currency_code))	The Foreign Exchange rates (*Administration/Finance-Setup/Foreign Exchange Rates*) must be set up with an Exchange Rate Type of 'Average' because this is the type the report references.
The Financial Plan insta-slice table is referenced for the budget and planned amounts because these amounts are calculated based on the fiscal year parameter.	prj_blb_slicerequests.request_name = 'costplandetail::cost::segment' AND prj_blb_slicerequests.id = odf_ssl_cst_dtl_cost.slice_request_id AND odf_ssl_cst_dtl_cost.prj_object_id = fin_cost_plan_details.id	Financial plan data is stored in the insta-slice tables so this table must be queried for amounts if the report has a fiscal period parameter. The main report and subreport display amounts based on the fiscal year parameter selected.

Financial Budget vs. Forecast by Period

The Financial Budget vs. Forecast by Period report displays budget or planned cost, compared to forecast cost, with variances for each period and in total. The report offers the ability to group by up to two financial plan grouping attributes, which may be any combination of the following: Charge Code, Cost Type, Department, Input Type Code, Location, Resource, Resource Class, Role, Transaction Class, User Value 1, and User Value 2.

This report also allows you to drill down to the Financial Budget vs. Forecast by Investment subreport, by clicking on the lowest level financial plan grouping attribute, to view amounts by investment.

Financial Budget vs. Forecast by Period (USD)

Cost Type / Trans Class	2013-01	2013-02	2013-03	2013-04	2013-05	2013-06	2013-07	2013-08	2013-09	2013-10	2013-11	2013-12	Total
Capital													
Budget	**1,358,600**	**1,302,300**	**1,345,200**	**1,390,800**	**1,444,310**	**1,402,300**	**1,400,750**	**1,358,630**	**1,213,100**	**1,131,000**	**1,150,700**	**1,122,800**	**15,620,490**
Forecast	**1,358,600**	**1,302,300**	**1,345,200**	**1,390,800**	**1,444,310**	**1,402,300**	**1,439,940**	**1,392,150**	**1,230,550**	**1,131,000**	**1,150,700**	**1,122,800**	**15,710,650**
Variance	**0**	**0**	**0**	**0**	**0**	**0**	**-39,190**	**-33,520**	**-17,450**	**0**	**0**	**0**	**-90,160**
External Labor													
Budget	325,000	365,800	353,500	400,000	441,660	462,550	509,000	449,930	393,700	295,800	306,100	295,500	4,598,540
Forecast	325,000	365,800	353,500	400,000	441,660	462,550	535,690	474,500	411,150	295,800	306,100	295,500	4,667,250
Variance	0	0	0	0	0	0	-26,690	-24,570	-17,450	0	0	0	-68,710
Internal Labor													
Budget	1,020,600	920,000	977,200	976,000	987,000	923,250	875,800	894,700	805,000	820,000	830,000	813,050	10,842,600
Forecast	1,020,600	920,000	977,200	976,000	987,000	923,250	888,300	903,650	805,000	820,000	830,000	813,050	10,864,050
Variance	0	0	0	0	0	0	-12,500	-8,950	0	0	0	0	-21,450
Software													
Budget	13,000	16,500	14,500	14,800	15,650	16,500	15,950	14,000	14,400	15,200	14,600	14,250	179,350
Forecast	13,000	16,500	14,500	14,800	15,650	16,500	15,950	14,000	14,400	15,200	14,600	14,250	179,350
Variance	0	0	0	0	0	0	0	0	0	0	0	0	0
Operating													
Budget	**290,000**	**295,000**	**310,500**	**310,000**	**289,500**	**265,850**	**247,000**	**250,400**	**243,750**	**225,000**	**180,000**	**195,000**	**3,102,000**
Forecast	**290,000**	**295,000**	**326,000**	**310,000**	**289,500**	**265,850**	**247,000**	**250,400**	**243,750**	**225,000**	**180,000**	**195,000**	**3,117,500**
Variance	**0**	**0**	**-15,500**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**-15,500**
Internal Labor													
Budget	290,000	295,000	310,500	310,000	289,500	265,850	247,000	250,400	243,750	225,000	180,000	195,000	3,102,000
Forecast	290,000	295,000	326,000	310,000	289,500	265,850	247,000	250,400	243,750	225,000	180,000	195,000	3,117,500
Variance	0	0	-15,500	0	0	0	0	0	0	0	0	0	-15,500
Grand Total													
Budget	**1,648,600**	**1,597,300**	**1,655,700**	**1,700,800**	**1,733,810**	**1,668,150**	**1,647,750**	**1,609,030**	**1,456,850**	**1,356,000**	**1,330,700**	**1,317,800**	**18,722,490**
Forecast	**1,648,600**	**1,597,300**	**1,671,200**	**1,700,800**	**1,733,810**	**1,668,150**	**1,686,940**	**1,642,550**	**1,474,300**	**1,356,000**	**1,330,700**	**1,317,800**	**18,828,150**
Variance	**0**	**0**	**-15,500**	**0**	**0**	**0**	**-39,190**	**-33,520**	**-17,450**	**0**	**0**	**0**	**-105,660**

Financial Budget vs. Forecast by Investment Subreport

The Financial Budget vs. Forecast by Investment subreport displays budget or planned cost, compared to forecast cost, with variances for each period and in total. It shows the amounts for each investment that make up the financial plan grouping that you selected when drilling from the main report.

Financial Budget vs. Forecast by Investment (USD)

Capital

Investment	2013-01	2013-02	2013-03	2013-04	2013-05	2013-06	2013-07	2013-08	2013-09	2013-10	2013-11	2013-12	Total
External Labor													
Budget	**325,000**	**365,800**	**353,500**	**400,000**	**441,660**	**462,550**	**509,000**	**449,930**	**393,700**	**295,800**	**306,100**	**295,500**	**4,598,540**
Forecast	**325,000**	**365,800**	**353,500**	**400,000**	**441,660**	**462,550**	**535,690**	**474,500**	**411,150**	**295,800**	**306,100**	**295,500**	**4,667,250**
Variance	**0**	**0**	**0**	**0**	**0**	**0**	**-26,690**	**-24,570**	**-17,450**	**0**	**0**	**0**	**-68,710**
eBusiness Network													
Budget	85,000	95,800	78,500	110,000	105,780	74,000	78,560	65,880	68,000	45,800	55,500	87,000	949,820
Forecast	85,000	95,800	78,500	110,000	105,780	74,000	90,250	76,950	85,450	45,800	55,500	87,000	990,030
Variance	0	0	0	0	0	0	-11,690	-11,070	-17,450	0	0	0	-40,210
Global Expense Application													
Budget	40,000	50,000	50,000	65,000	65,880	68,550	70,440	45,550	40,700	35,000	35,600	38,500	605,220
Forecast	40,000	50,000	50,000	65,000	65,880	68,550	70,440	45,550	40,700	35,000	35,600	38,500	605,220
Variance	0	0	0	0	0	0	0	0	0	0	0	0	0
Mobile Commerce													
Budget	75,000	70,000	80,000	90,000	90,000	90,000	85,000	70,000	60,000	75,000	80,000	40,000	905,000
Forecast	75,000	70,000	80,000	90,000	90,000	90,000	85,000	70,000	60,000	75,000	80,000	40,000	905,000
Variance	0	0	0	0	0	0	0	0	0	0	0	0	0
Online Order Catalog													
Budget	125,000	150,000	145,000	135,000	180,000	230,000	275,000	268,500	225,000	140,000	135,000	130,000	2,138,500
Forecast	125,000	150,000	145,000	135,000	180,000	230,000	290,000	282,000	225,000	140,000	135,000	130,000	2,167,000
Variance	0	0	0	0	0	0	-15,000	-13,500	0	0	0	0	-28,500

Report Prerequisites:

- The investment must have at least one financial plan for the investment to display in the report. The report has a financial plan type parameter with the values of budget or planned so you may run the report for budget or cost plan amounts. If the financial plan type parameter is budget, then the investment must have at least one approved budget for the investment to display in the report. If the financial plan type parameter is planned, then the investment must have at least one cost plan for the investment to display in the report.
- The investment must have a department OBS unit associated to it in order to create a cost plan on the investment. For a department OBS to be available to associate to an investment, you must first set up a department OBS and a location OBS (*Administration/Organization and Access-OBS*) and associate them to the investment objects (e.g., Application, Project, etc.) on which you will create financial plans. Next, you must create an entity (*Administration/Finance-Setup/Entities*) and associate the department OBS and location OBS to the entity. On the entity, you must create fiscal time periods (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) for the period types (monthly, 13 periods, quarterly, annually) that you want to reference in creating financial plans. If you don't intend to plan by annual fiscal periods, you must still create them because the report requires them as explained in the next bullet item.
- There must be fiscal time periods, with a period type of annually, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) that cover the periods for which you have investment financial plans in Clarity. For example, if you have investments with monthly or quarterly budgets or cost plans for 2012 and 2013, then you must have annual fiscal periods created for 2012 and 2013 even though you aren't creating budgets or cost plans by these annual periods. The report uses these annual periods to convert the budget and cost plan amounts entered so they may be reported by fiscal year, independent of how they are entered in the financial plans.

- There must be fiscal time periods, with a period type of monthly or 13 periods, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*). There is an as of date parameter that is evaluated to the end of the fiscal period in which it falls, by comparing it to fiscal periods with a type of monthly or 13 periods, whichever you have set up in your system. If you do not have fiscal periods with a type of monthly or 13 periods, then the report will not be able to evaluate the as of date parameter to a fiscal period to calculate actuals to date and forecast (calculated).

Report Definition:

Name:	Financial Budget vs. Forecast by Period
ID:	CSP_FIN_BudgetForecastByPeriod
Description:	Financial Budget vs. Forecast by Period (CSP)
Executable Name:	/CSP/Financial Budget vs Forecast by Period

Report Parameters:

Parameter Label **Bind Parameter Code**	**Type** **Style**	**Lookup Name** **Lookup ID**	**Required** **Default Value**
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Investment Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Budget
Entity param_entity	Pull-down Single-select	Entity Browse SCH_BROWSE_ENTITY	Yes
Fiscal Year param_year	Browse Multiple-select	Report (Fiscal Years) CSP_RPT_FIN_FISCAL_YEAR	Yes
Period Type param_period_type	Pull-down Single-select	Period Type PERIOD_TYPE	Yes Monthly
As of Date param_as_of	Relative Date		Yes End of Previous Month
Report Currency param_curr	Pull-down Single-select	Report (Currencies) CSP_RPT_FIN_CURRENCY	Yes USD
Include Inactive Investments? param_i_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Financial Plan Group By 1 param_group1	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	Yes
Financial Plan Group By 2 param_group2	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	No
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Investment Status: All, Approved, Unapproved
Financial Plan Type: Budget, Planned
Period Type: 13 Periods, Weekly, Semi Monthly, Month, Quarterly, Annually
Financial Plan Group By 1 and 2: Charge Code, Cost Type, Department, Input Type Code, Location, Resource, Resource Class, Role, Transaction Class, User Value 1, User Value 2

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Financial Plan Type parameter allows you to select which type of financial plan to include in the report. You may run the report to display budget amounts from the budget or planned amounts from the cost plan. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

  Budget — The budget amounts in the report are based on the current approved budget. The above screen capture displays the amounts as budget because this is the parameter value selected when running the report.

  Planned — The planned amounts in the report are based on the current cost plan of record. The above screen capture was run with the option of budget. If it were run with the option of planned, then it would display the word planned where it displays the word budget in the report title and row labels.
- The Entity parameter is required because the report displays amounts by fiscal period. In Clarity, fiscal periods are defined for each entity. In order to report across consistent fiscal periods, all investments in the report must belong to the same entity. The entity is determined via the department associated to the investment.
- The Fiscal Year parameter allows you to control which costs, from the financial plans and actual transactions, are included in the report. When you select a fiscal year, the budget or planned amounts are restricted to only display the amounts within the fiscal year you select. The same applies to actual amounts. You may view costs for one or several fiscal years, regardless of whether the financial plans are entered by period types of monthly, 13 periods, quarterly, or annually.

- The Period Type parameter allows you to change the type of fiscal period that displays across the columns of the report. The following options are available:

13 Periods	The report displays amounts by the 13 period fiscal period type.
Weekly	The report displays amounts by the weekly fiscal period type.
Semi Monthly	The report displays amounts by the semi-monthly fiscal period type.
Monthly	The report displays amounts by the monthly fiscal period type.
Quarterly	The report displays amounts by the quarterly fiscal period type.
Annually	The report displays amounts by the annually fiscal period type.

- The As of Date parameter allows you to enter the fiscal period finish date that will be used to calculate the forecast cost amounts in the report. You should enter a date that is the end of a fiscal period in this parameter. If you enter a date that is not the finish date of a fiscal period, then the report will determine which fiscal period the date you enter resides and it will use the finish date of that fiscal period for the report calculations. The report looks at fiscal periods with a period type of monthly or 13 periods when it determines the finish date this way.
- The Report Currency parameter allows you to convert the amounts in the report to one currency for reporting purposes. If you do not use multi-currency then all your investments will be in the same currency and you will only have one currency to select in the report currency parameter. In this case, the report displays amounts in the entity's home currency of the department associated to the investment.

  If you use multi-currency, then you will have the option to select any currency you have active in Clarity as the report currency. When you select a currency in the parameter, the amounts in the report will be converted into that currency per the exchange rates set up in Clarity, if the report currency is different from the investment currency. In order to use this Report Currency parameter to convert currencies, you must have multi-currency enabled in your installation of Clarity (*Administration/Finance-Setup/Defaults*). In the Currency section, there is a System field that must be set to Multi Currency. In addition to multi-currency being enabled, you must also activate the currencies you want to use in Clarity (*Administration/Finance-Setup/Currency*). Lastly, you must set up Foreign Exchange rates in Clarity (*Administration/Finance-Setup/Foreign Exchange Rates*). The report uses exchange rates with an Exchange Rate Type of 'Average' so you must set up exchange rates of this type.
- The report has Financial Plan Group By 1 and Financial Plan Group By 2 parameters that allow you to control how the report is grouped. You may group the report by up to two options, which may be any combination of the following grouping options:

Charge Code	This option groups the report by charge code.
Cost Type	This option groups the report by cost type.
Department	This option groups the report by department.
Input Type Code	This option groups the report by input type code.
Location	This option groups the report by location.
Resource	This option groups the report by resource.
Resource Class	This option groups the report by resource class.
Role	This option groups the report by role.
Transaction Class	This option groups the report by transaction class.
User Value 1	This option groups the report by user value 1.
User Value 2	This option groups the report by user value 2.

Report Fields and Calculations:
The first column of the report is determined by the values selected in the financial plan group by 1 and financial plan group by 2 parameters. The report displays budget or planned and forecast cost amounts with variances. If the financial plan type parameter is set to budget, then the report displays budget cost, forecast cost, and variance. For budgets, the report only includes the current approved budget amounts. If the financial plan type parameter is set to planned, then the report displays planned cost, forecast cost, and variance. For planned, the report only includes the current plan of record cost plan amounts.

The report displays up to twelve period columns, and a total column, for all fiscal period types except the 13 period type. The report displays up to thirteen period columns, and total column, if the period type parameter is 13 periods. You have the option to run the report for multiple fiscal years, which may result in the number of periods exceeding these limits. In this case, the report will display the additional fiscal periods on multiple pages.

This report contains the following calculations, which are all subject to the fiscal year parameter:

Budget or Planned This is the approved budget or planned cost for the cost plan of record.

Forecast Actual To Date + Forecast Remaining

Actual To Date is the actual cost in fiscal periods prior to the date entered in the as of date parameter. For example, if as of date parameter is 05/31/2012, then the actual to date is the actual cost thru the fiscal period ending 05/31/2012.

Forecast Remaining is the planned cost in the cost plan of record after the date entered in the as of date parameter. For example, if the as of date parameter is 05/31/2012, then forecast remaining is planned cost in fiscal periods after the fiscal period ending 05/31/2012.

Variance Budget or Planned – Forecast

Variance background color is as follows:
Red The Forecast exceeds Budget or Planned, which means the variance is a negative number.

Subreport Fields and Calculations:
The subreport displays the budget or planned, forecast, and variance amounts by investment for the financial plan grouping that you selected when drilling from the main report. It displays the same columns, with the same calculations and background color, as the main report.

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
The current approved budget or cost plan of record is the only financial plan included.	fin_plans.is_plan_of_record = 1	The plan of record for the cost plan is the one designated as plan of record. The plan of record for the budget is current approved budget.
Budget and cost plans are included.	fin_plans.sub_plan_type = 0	Benefit plans are excluded (fin_plans.sub_plan_type = 1). The financial plans table has cost plan, budget, and benefit plan records.

Topic	Database Statement	Additional Explanation
Actual financial transaction cost amounts only include transactions processed and posted.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.
Actual financial transaction cost amounts are in the currency that is the entity's home currency of the department associated to the investment.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to an investment, the investment home currency is determined by the entity's home currency for the department.
Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.	FIN_CONVERT_CURRENCY_FCT(NVL(SUM(ROUND(odf_ssl_cst_dtl_cost.slice * (odf_ssl_cst_dtl_cost.finish_date - odf_ssl_cst_dtl_cost.start_date),2)) 'AVERAGE',SYSDATE,i.currency_code,NVL('{ ?param_curr}',i.currency_code))	The Foreign Exchange rates (*Administration/Finance-Setup/Foreign Exchange Rates*) must be set up with an Exchange Rate Type of 'Average' because this is the type the report references.
The Financial Plan insta-slice table is referenced for the budget and planned amounts because these amounts are calculated based on the fiscal year parameter.	prj_blb_slicerequests.request_name = 'costplandetail::cost::segment' AND prj_blb_slicerequests.id = odf_ssl_cst_dtl_cost.slice_request_id AND odf_ssl_cst_dtl_cost.prj_object_id = fin_cost_plan_details.id	Financial plan data is stored in the insta-slice tables so this table must be queried for amounts if the report has a fiscal period parameter. The main report and subreport display amounts based on the fiscal year parameter selected.

Investment Transaction Inquiry

The Investment Transaction Inquiry report displays actual quantity and cost, by resource and day, for each investment. The report and pie charts may be grouped by a variety of options, making it a very dynamic report.

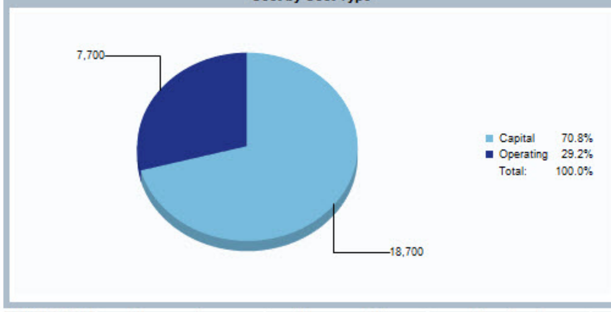
Investment Transaction Inquiry: eCommerce Portal (USD)

Investment ID	PR1002	**Investment Manager**	Martin, Paul
Start Date	10/4/2012	**Financial Status**	Open
Finish Date	12/31/2013	**Company Name**	CA

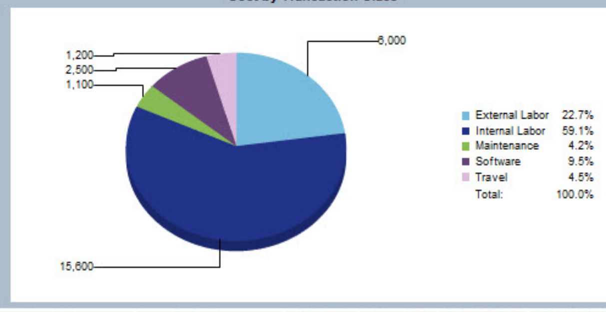
Objective

Development of a new portal for all Online Client Services

Cost by Cost Type



Cost by Transaction Class



Transaction Date	Resource Name	Resource Role	Department	Location	Task Name	Posted Date	Quantity	Actual Cost Rate	Total Cost
Capital									
External Labor									
12/12/2012	Morris, Tom	Architect	Shared Services	New York	User Interface	1/10/2013	4.00	150.00	600.00
12/13/2012	Morris, Tom	Architect	Shared Services	New York	User Interface	1/10/2013	8.00	150.00	1,200.00
12/14/2012	Morris, Tom	Architect	Shared Services	New York	User Interface	1/10/2013	8.00	150.00	1,200.00
12/15/2012	Morris, Tom	Architect	Shared Services	New York	User Interface	1/10/2013	8.00	150.00	1,200.00
12/16/2012	Morris, Tom	Architect	Shared Services	New York	User Interface	1/10/2013	8.00	150.00	1,200.00
12/19/2012	Morris, Tom	Architect	Shared Services	New York	User Interface	1/10/2013	4.00	150.00	600.00
External Labor Total							**40.00**		**6,000.00**
Internal Labor									
12/12/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	4.00	150.00	600.00
12/13/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/14/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/15/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/16/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/19/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/20/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/21/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
12/22/2012	Hill, Wayne	Developer	Development	Chicago	User Interface	1/10/2013	8.00	150.00	1,200.00
Internal Labor Total							**68.00**		**10,200.00**
Software									
12/9/2012	License	Material	Development	Chicago	Enterprise Software	1/10/2013	1.00	1,000.00	1,000.00
12/16/2012	License	Material	Development	Chicago	Enterprise Software	1/10/2013	1.00	1,500.00	1,500.00
Software Total							**2.00**		**2,500.00**
Capital Total									**18,700.00**
Operating									
Internal Labor									
12/6/2012	Goldman, Mark	Business Analyst	Business Operations	New York	Functional Design	1/10/2013	8.00	150.00	1,200.00
12/7/2012	Goldman, Mark	Business Analyst	Business Operations	New York	Functional Design	1/10/2013	8.00	150.00	1,200.00
12/8/2012	Goldman, Mark	Business Analyst	Business Operations	New York	Functional Design	1/10/2013	8.00	150.00	1,200.00
12/9/2012	Goldman, Mark	Business Analyst	Business Operations	New York	Functional Design	1/10/2013	8.00	150.00	1,200.00
12/12/2012	Goldman, Mark	Business Analyst	Business Operations	New York	Functional Design	1/10/2013	4.00	150.00	600.00
Internal Labor Total							**36.00**		**5,400.00**
Maintenance									
12/20/2012	Maintenance	Material	Development	Chicago	Enterprise Software	1/10/2013	1.00	1,100.00	1,100.00
Maintenance Total							**1.00**		**1,100.00**
Travel									
12/12/2012	Travel	Travel Expenses	Business Operations	New York	Functional Design	1/10/2013	1.00	1,200.00	1,200.00
Travel Total							**1.00**		**1,200.00**
Operating Total									**7,700.00**

Labor				Non-Labor		Total	
Chargeable Hours	104.00	**Chargeable Cost**	15,600.00	**Chargeable Cost**	0.00	**Chargeable Cost**	15,600.00
Non-Chargeable Hours	40.00	**Non-Chargeable Cost**	6,000.00	**Non-Chargeable Cost**	4,800.00	**Non-Chargeable Cost**	10,800.00
Total Hours	144.00	**Total Cost**	21,600.00	**Total Cost**	4,800.00	**Total Cost**	26,400.00

Report Prerequisites:

- The investment must have the financial fields populated in order to post transactions to financials for the investment. These fields are in the financial section of the settings properties on the project and include financial status, type, billing currency, department, location, and charge code. Alternatively, the resource may select a charge code in the timesheet if the timesheet is configured to display this field. The financial status field must be set to open in order to post financial transactions. If the financial status is hold or closed, Clarity will not post transactions for the investment.
- The resource must have the financially active field checked and the financial fields populated in order to post transactions to financials. These fields are in the financial properties of the resource and include financial department, financial location, transaction class, and resource class. The resource must also have the input type field completed in the time tracking section of the settings properties on the resource. Alternatively, the resource may select an input type code in the timesheet if the timesheet is configured to display this field.
- The investment and resource must have a department OBS unit associated to them in order to process financial transactions. For a department OBS to be available to associate to an investment and resource, you must first set up a department OBS and a location OBS (*Administration/Organization and Access-OBS*) and associate them to the investment objects (e.g., Application, Project, etc.) and resource object for which you will enter transactions. Next, you must create an entity (*Administration/Finance-Setup/Entities*) and associate the department OBS and location OBS to the entity. The entity determines the home currency of the investment when you associate the department to the investment.
- There must be a rate matrix created (*Administration/Finance-Manage Matrix*) and associated as a system default rate matrix (*Administration/Finance-Setup/Defaults/Project Transaction Entry Defaults*) or an investment specific rate matrix for calculation of cost amounts. The matrix is required in order to calculate cost, if posting timesheets as financial transactions. The matrix is optional if entering transactions thru transaction entry or importing from an external system. In those cases, the cost rate may be entered or imported with the transaction.
- Financial transactions can be initiated from timesheets, transaction entry, or imported from external systems.
- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- There must be charge codes created (*Administration/Project Management-Charge Codes*) and associated to the investment in order to post timesheets as financial transactions. For projects, the transaction charge code is determined in the following order, whichever it finds first: based on the task charge code; then, based on a parent task charge code by walking up the work breakdown structure; and lastly, based on the project charge code. For non-project investments, the transaction charge code is determined by the charge code entered on the investment. If the transaction is entered thru transaction entry or imported from an external system, the charge code can be entered or imported with the transaction.
- There must be transaction classes created (*Administration/Finance/Setup-Transaction Classes*) and associated to the resource in order to post timesheets as financial transactions. If the transaction is entered thru transaction entry or imported from an external system, the transaction class can be entered or imported with the transaction.
- There must be resource classes created (*Administration/Finance/Setup-Resource Classes*) and associated to the resource in order to post timesheets as financial transactions. If the transaction is entered thru transaction entry or imported from an external system, the resource class can be entered or imported with the transaction.

- There must be input type codes created (*Administration/Project Management-Input Type Codes*) and associated to the resource in order to post timesheets as financial transactions. If the transaction is entered thru transaction entry or imported from an external system, the input type code can be entered or imported with the transaction. Note: The input type code is not on the financial properties of the resource; it is in the time tracking section of the settings properties on the resource.

Report Definition:

Name: Investment Transaction Inquiry
ID: CSP_FIN_InvTransactionInquiry
Description: Investment Transaction Inquiry (CSP)
Executable Name: /CSP/Investment Transaction Inquiry

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Start Date param_start_date	Relative Date		Yes
End Date param_end_date	Relative Date		Yes
Transaction Status param_trans_stat	Pull-down Single-select	Transaction Status RPT_TRANSACTION_STATUS	No
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Graph 1 Group By param_graph1	Pull-down Single-select	Report (Financial Plan Grouping Attributes Except Resource, Transaction Type) CSP_RPT_FIN_ATTRIBUTES2_GROUP	Yes Charge Code
Graph 2 Group By param_graph2	Pull-down Single-select	Report (Financial Plan Grouping Attributes Except Resource, Transaction Type) CSP_RPT_FIN_ATTRIBUTES2_GROUP	Yes Transaction Class
Transaction Group By 1 param_group1	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	No Transaction Type
Transaction Group By 2 param_group2	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Report Column 1 param_column1	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	Yes Resource
Report Column 2 param_column2	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	Yes Resource Role
Report Column 3 param_column3	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	Yes Task
Report Column 4 param_column4	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	Yes Charge Code
Report Column 5 param_column5	Pull-down Single-select	Report (Financial Plan Grouping Attributes, Task, Transaction Type) CSP_RPT_FIN_ATTRIBUTES1_GROUP	Yes Transaction Class
Show Graphs? param_show_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Transaction Status: Posted, Unposted
Graph 1 and 2 Group By: Charge Code, Cost Type, Department, Input Type, Location, Resource Class, Resource Role, Transaction Class, Transaction Type, User Value 1, User Value 2
Transaction Group By 1 and 2: Charge Code, Cost Type, Department, Input Type, Location, Resource, Resource Class, Resource Role, Task, Transaction Class, Transaction Type, User Value 1, User Value 2
Report Column 1-5: Charge Code, Cost Type, Department, Input Type, Location, Resource, Resource Class, Resource Role, Task, Transaction Class, Transaction Type, User Value 1, User Value 2

Parameter Explanations:

- The Investment OBS parameter allows you to control which investments display in the report. When you select an OBS unit in this parameter, the report will display the investments attached to the OBS unit you select and the investments attached to any OBS units that are descendent units of the OBS unit you select.
- The Start Date and End Date parameters determine which transaction dates are included in the report.
- The Transaction Entry Number parameter is a text field which allows you to display only transactions related to a specific transaction entry number. The text field is case sensitive so you must capitalize letters in the parameter if they are capitalized in the entry number. The parameter supports a wildcard character (*) being entered at the end of the string; the report displays all matching records that meet the criteria entered preceding the wildcard character.

- The Transaction Status parameter allows you to select which transactions to include in the report and works as follows:

Posted	This option includes financial transactions that have been posted via the Post to WIP (*Home/Financial Management-Post to WIP*).
Unposted	This option includes timesheets and transactions imported from external systems that have been posted to financials for processing via the Post Transactions to Financials job (*Home/Personal-Reports and Jobs*) or entered in transaction entry, but are not yet posted via the Post to WIP (*Home/Financial Management-Post to WIP*).

- The report has Graph 1 Group By and Graph 2 Group By parameters that allow you to control how each chart in the report is grouped. You may group each chart by the following grouping options:

Charge Code	This option groups the chart by charge code.
Cost Type	This option groups the chart by cost type.
Department	This option groups the chart by department.
Input Type	This option groups the chart by input type code.
Location	This option groups the chart by location.
Resource Class	This option groups the chart by resource class.
Resource Role	This option groups the chart by resource role.
Transaction Class	This option groups the chart by transaction class.
Transaction Type	This option groups the chart by transaction type.
User Value 1	This option groups the chart by user value 1.
User Value 2	This option groups the chart by user value 2.

- The report has Transaction Group By 1 and Transaction Group By 2 parameters that allow you to control how the body of the report is grouped. You may group the report by up to two options, which may be any combination of the following grouping options:

Charge Code	This option groups the body of the report by charge code.
Cost Type	This option groups the body of the report by cost type.
Department	This option groups the body of the report by department.
Input Type	This option groups the body of the report by input type code.
Location	This option groups the body of the report by location.
Resource	This option groups the body of the report by resource.
Resource Class	This option groups the body of the report by resource class.
Resource Role	This option groups the body of the report by resource role.
Task	This option groups the body of the report by task.
Transaction Class	This option groups the body of the report by transaction class.
Transaction Type	This option groups the body of the report by transaction type.
User Value 1	This option groups the body of the report by user value 1.
User Value 2	This option groups the body of the report by user value 2.

- The report has Report Column 1-5 parameters that allow you to control the columns that display in the report. You may select up to five columns to display in the report and control the order in which they display. Report column 1 displays first and report column 5 displays last. The report column options are as follows:

Charge Code	The charge code column displays in the report.
Cost Type	The cost type column displays in the report.
Department	The department column displays in the report.
Input Type	The input type code column displays in the report.
Location	The location column displays in the report.
Resource	The resource column displays in the report.
Resource Class	The resource class column displays in the report.
Resource Role	The resource role column displays in the report.
Task	The task column displays in the report.
Transaction Class	The transaction class column displays in the report.
Transaction Type	The transaction type column displays in the report.
User Value 1	The user value 1 column displays in the report.
User Value 2	The user value 2 column displays in the report.

- The Show Graph parameter controls whether the cost charts display on the report. If the parameter is checked, the charts will display at the top of each investment transaction section in the report. If the parameter is not checked, the charts will not display.

Report Fields and Calculations:

The report has two pie charts showing the cost distribution according to the graph group by options selected when running the report. The amounts in the charts are a summary of all transactions meeting the parameter criteria of the report.

The report displays the investment name, investment ID, start date, finish date, investment manager, financial status, company name, and objective at the top of the report. The body of the report displays the following investment transaction information: transaction date, report columns 1 thru 5 selected via the parameters, posted date, quantity, actual cost rate, and total cost. The report adjusts the column headings and content according to the values selected in the Report Column 1-5 parameters, which may be any combination of the following: charge code, cost type, department, input type, location, resource, resource class, resource role, task, transaction class, transaction type, user value 1 and user value 2. In the above screen capture, resource name, resource role, department, location, and task were the columns selected when running the report.

The transactions may be grouped by up to two options in the report body, which may be any combination of the following: charge code, cost type, department, input type, location, resource, resource class, resource role, task, transaction class, transaction type, user value 1, and user value 2.

At the bottom of each investment section in the report, there is a summary for labor, non-labor, and total amounts of all transactions included in the report for the investment. The labor amounts include chargeable hours, non-chargeable hours, total hours, chargeable cost, non-chargeable cost, and total cost. The non-labor and total amounts include chargeable cost, non-chargeable cost, and total cost. The chargeable amounts represent transactions that were processed with the chargeable option checked. The chargeable option may be checked if the transaction is entered thru transaction entry or imported from an external system. If the transaction originates with a timesheet, then the chargeable option defaults from the input type code associated to the resource. The input type code has a chargeable option that you select when setting it up in administration.

Report Security and Technical Details:
Security is determined by investment view rights.

Topic	Database Statement	Additional Explanation
Actual financial transaction cost amounts only include transactions processed and posted.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.
Actual financial transaction cost amounts are in the currency that is the entity's home currency of the department associated to the investment.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to an investment, the investment home currency is determined by the entity's home currency for the department.

Chapter 6: Program Management

This section contains the following topic:

Crystal Reports

The program management reports provide visibility into program status, financial performance, key milestones, risks, issues and change requests. The reports also provide insight into budget, planned and forecast costs by fiscal period. The reports include program and subproject information.

The reports include:

Program Status Detail

The Program Status Detail report displays the latest status report update and indicators for the program. It also has sections for financial performance, key milestones, team allocations, risks, issues and change requests for the program and its projects. The report is very flexible; it allows you to control which sections appear and to choose if each section includes the program only, its projects only, or both the program and its projects.

Program Status Detail: Mobile Technology Program

Program ID	PG1000	**Status Report Date**	7/12/2013
Manager	Granger, Paula	**Previous Report Date**	6/28/2013
Status	Approved	**Finish Date**	12/31/2013

Status Report Indicators

Overall		Schedule	
Scope		Cost and Effort	

Program Objective

Address the customer requirement for a new system to manage content, as well as a transaction engine, for online purchases via mobile devices. Ensure capability of enterprise-wide data exchange and verify that standards are in place to incorporate the new system across the organization. Facilitate the roll-out of commerce applications and services that will be accessible from mobile devices. Manage and support the mobile devices deployed across mobile operators and service providers.

Status Report Update

Several changes have occurred since the last status report. All major changes have been submitted via change requests. The main items for this status report are as follows:
- The scope issues reported earlier have been resolved and incorporated into the project objective
- There are additional schedule impacts anticipated if additional external resources are not secured
- Change requests have been submitted for additional resources and equipment. An update will be provided at the next program review.

Financial Performance

Program / Project	Start	Finish	Financial Cost			Performance Cost				
			Planned	Actual	Remaining	As Of Date	BAC	Actual (ACWP)	EAC	Projected Variance
Mobile Technology Program	**1/1/2013**	**12/31/2013**	**930,000.00**	**0.00**	**930,000.00**	**7/19/2013**	**770,775.00**	**236,487.00**	**811,575.00**	**40,800.00**
Mobile Commerce	1/1/2013	12/31/2013	477,055.00	126,487.00	350,568.00	7/19/2013	414,255.00	126,487.00	427,055.00	12,800.00
Mobile Security	2/1/2013	12/31/2013	356,650.00	110,000.00	246,650.00	7/19/2013	356,520.00	110,000.00	384,520.00	28,000.00
Project Total			**833,705.00**	**236,487.00**	**597,218.00**					
Variance			**96,295.00**	**-236,487.00**	**332,782.00**					

Key Milestones

Name	ID	Status	Finish	Baseline Finish	Days Late	Schedule
Mobile Technology Program						
Design and Construction Phase Gate Complete	LM.003.100	Started	6/28/2013		22	
Deployment and Quality Phase Gate Complete	LM.004.100	Not Started	10/31/2013		0	
Mobile Commerce						
Design and Construction Phase Gate Complete	LM.003.100	Completed	6/21/2013	5/31/2013	21	
Deployment and Quality Phase Gate Complete	LM.004.100	Started	10/11/2013	10/4/2013	7	
Mobile Security						
Design and Construction Phase Gate Complete	LM.003.100	Completed	6/14/2013	6/14/2013	0	
Deployment and Quality Phase Gate Complete	LM.004.100	Started	10/25/2013	10/25/2013	0	

Report Page 1: Program Objective, Status Report Indicators, Financial Performance, and Key Milestones

Program Status Detail: Mobile Technology Program

Team

Role	Start	Finish	% Complete	Allocation	Baseline	Actuals	ETC	EAC	Projected Variance
Architect	1/1/2013	12/31/2013	24	1,225.20	760.00	200.00	640.00	840.00	-80.00
Business Analyst	1/1/2013	12/31/2013	26	598.80	540.00	140.00	400.00	540.00	0.00
Developer	1/1/2013	12/31/2013	5	1,768.80	1,460.00	78.70	1,561.30	1,640.00	-180.00
Network Engineer	1/1/2013	12/31/2013	24	912.00	878.20	208.20	670.00	878.20	0.00
Project Manager	1/1/2013	12/31/2013	62	313.20	208.10	128.10	80.00	208.10	0.00
Total			**18**	**4,818.00**	**3,846.30**	**755.00**	**3,351.30**	**4,106.30**	**-260.00**

Risks

Name	ID	Description	Priority	Probability	Impact	Status	Response Type	Target Resolution
Mobile Technology Program								
Insufficient capacity may impede proper sizing of teams to meet milestones	RS1073	Capacity planning must be assessed to ensure proper sizing of the teams and system resources.		Medium	High	Open	Watch	8/12/2013
Mobile Commerce								
Interfaces to other systems	RS1014	Interfaces to other systems could be beyond the expertise of our staff.		Low	Medium	Open	Watch	8/2/2013
Mobile Security								
Sponsorship risk	RS1013	Sponsorship needs to be well defined in order to get quick approval on all purchases and decisions.		Medium	Medium	Work in Progress	Mitigate	7/26/2013

Issues

Name	ID	Description	Priority	Status	Target Resolution
Mobile Commerce					
Accept popular payment methods	IS0006	Portal needs to accept all popular online payment methods.		Open	7/25/2013

Change Requests

Name	ID	Description	Priority	Status	Expected Close
Mobile Commerce					
Additional sales analytics	CH1004	System must include metrics for customer demographics.		Open	8/30/2013

Report Page 2: Program Team, Risks, Issues, and Change Requests

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- The status report indicators and status report update are based on the most recent program status report so at least one status report must be completed on the program for the indicators to calculate and the information in the frames be displayed. The status report with the greatest report date and a report status of final, or no value selected for report status, is considered the most recent.
- The program and its projects must have planned cost or budgeted cost amounts entered in the financial summary properties to display the planned or budget and remaining amounts under the financial cost heading in the financial performance section. If the program and its projects have detailed cost plans or budget plans created under the financial plans tab, then the planned cost and budgeted cost amounts on the financial summary properties will be read only and set according to the amounts in the detailed financial plan. In this case, the cost plan amount for the plan of record or approved budget amount will display on the financial summary properties and in the report.
- The program and its projects must have milestones, risks, issues and change requests for those report sections to display data. Milestones must have the key task field checked in order to display in the report.
- The projects in the program must have team members allocated to them for the team section to display data in the report. Team members cannot be allocated to programs so the team members displaying in this report roll up from the project teams.

- The projects in the program must have team members assigned to tasks with estimates to calculate the ETC and EAC hours that display in the team section.
- The projects in the program must have actual hours posted thru timesheets, transaction entry, or imported into Clarity to calculate actuals in the team section, actual cost under the financial cost heading in the financial performance section, and actual (ACWP) cost under the performance cost heading in the financial performance section.
- The projects in the program must have baselines for baseline hours and the projected variance to display in the team section. They must also have baselines for BAC and the projected variance to display under the performance cost heading in the financial performance section.
- The project cost amounts under the performance cost heading in the financial performance section are dependent upon running the *Update Cost Totals* job. This job is available in the Actions pull-down on the task list or baseline list. The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.
- The amounts in the financial performance and team sections of the report are dependent upon the projects in the program having hierarchy allocation percentages that are greater than 0%. If the allocation percentage is set to 0% on a project, then the amounts in the report will be 0. The allocation percentage is set on the hierarchy tab of the program or project. If setting from the project, you must navigate to the 'parents' submenu under the hierarchy tab.
- There are several sections in the report that are dependent upon running the *Update Business Objects Report Tables* job with the update investment hierarchy option checked. If this job is not run, the projects in the program and their data will not display in the following sections: financial performance, key milestones, team, risks, issues, and change requests. Note: The hierarchy allocation percentages on the projects must be set to values greater than 0% before running this job.

Report Definition:

Name:	Program Status Detail
ID:	CSP_PRG_ProgramStatusDetail
Description:	Program Status Detail (CSP)
Executable Name:	/CSP/Program Status Detail

Report Parameters:

Parameter Label **Bind Parameter Code**	**Type** **Style**	**Lookup Name** **Lookup ID**	**Required** **Default Value**
Program OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Program Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Program param_investment	Browse Multiple-select	Portlet Programs COP.PORTLET_PROGRAMS	No
Program Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Project Status param_prj_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Program Financial Plan Type param_prg_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Project Financial Plan Type param_prj_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Rollup Project Financials to Program? param_rollup	Checkbox		No Unchecked
Show Financials? param_show_projects	Pull-down Single-select	Report (Program and Project, Program Only, Project Only) CSP_RPT_PRG_DISPLAY	Yes Program and Project
Show Milestones? param_show_miles	Pull-down Single-select	Report (Program and Project, Program Only, Project Only) CSP_RPT_PRG_DISPLAY	Yes Program and Project
Show Team? param_show_team	Pull-down Single-select	Report (Summarize by Role, Display Project Teams) CSP_RPT_PRG_TEAM_DISPLAY	Yes Summarize by Role
Show Risks? param_show_risks	Pull-down Single-select	Report (Program and Project, Program Only, Project Only) CSP_RPT_PRG_DISPLAY	Yes Program and Project
Show Issues? param_show_issues	Pull-down Single-select	Report (Program and Project, Program Only, Project Only) CSP_RPT_PRG_DISPLAY	Yes Program and Project
Show Change Requests? param_show_crs	Pull-down Single-select	Report (Program and Project, Program Only, Project Only) CSP_RPT_PRG_DISPLAY	Yes Program and Project
Risk, Issue, and CR Priority param_priority	Pull-down Multiple-select	Risk/Issue Priority RIM_PRIORITY	Yes Low, Medium, and High
Risk, Issue, and CR Status param_rim_status	Pull-down Multiple-select	Risk/Issue Status RIM_STATUS	Yes Open, Work in Progress, Resolved, and Closed
Include Inactive Programs? param_prg_active	Checkbox		No Unchecked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Program Status: All, Approved, Unapproved
Project Status: All, Approved, Unapproved
Program Financial Plan Type: Budget, Planned
Project Financial Plan Type: Budget, Planned
Show Financials?: Program and Project, Program Only, Project Only, Do Not Display
Show Milestones?: Program and Project, Program Only, Project Only, Do Not Display
Show Team?: Summarize by Role, Display Project Teams
Show Risks?: Program and Project, Program Only, Project Only, Do Not Display
Show Issues?: Program and Project, Program Only, Project Only, Do Not Display
Show Change Requests?: Program and Project, Program Only, Project Only, Do Not Display
Risk, Issue, and CR Priority: Low, Medium, High
Risk, Issue, and CR Status: Open, Work in Progress, Resolved, Closed

Parameter Explanations:

- The Program OBS parameter allows you to control which programs display in the report. When you select an OBS unit in this parameter, the report will display the programs attached to the OBS unit you select and the programs attached to any OBS units that are descendent units of the OBS unit you select.
- The Program Financial Plan Type parameter allows you to select which type of financial cost to include in the report: budget or planned cost. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

  Budget The budget cost in the report is the budgeted cost from the program financial summary properties. This field is populated from the approved budget plan, if there is a detailed budget plan on the program.

  Planned The planned cost in the report is the planned cost from the program financial summary properties. This field is populated from the cost plan that is the plan of record, if there is a detailed cost plan on the program.
- The Project Financial Plan Type parameter allows you to select which type of financial cost to include in the report: budget or planned cost. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

  Budget The budget cost in the report is the budgeted cost from the project financial summary properties. This field is populated from the approved budget plan, if there is a detailed budget plan on the project.

  Planned The planned cost in the report is the planned cost from the project financial summary properties. This field is populated from the cost plan that is the plan of record, if there is a detailed cost plan on the project.
- The Rollup Project Financials to Program parameter allows you to control how the amounts under the financial cost heading in the financial performance section of the report are calculated. If the rollup parameter is checked, then the program amounts represent the aggregate of the program and

project amounts. If the rollup parameter is not checked, then the program amounts represent only the program values and do not include any project amounts. In this case, the report presents an extra row for the Project Total, which is the sum of the project financial cost amounts. There is also an extra row for Variance, which is the difference between the program and the project financial cost amounts. This allows you to compare the program budget/planned amounts to the aggregate of the project budget/planned amounts. Note: The amounts under the performance cost heading in the financial performance section are always rolled up regardless of whether this parameter is checked or not.

- The following parameters have the same options and work similarly so they are being described together: Show Financials, Show Milestones, Show Risks, Show Issues, and Show Change Requests. These parameters allow you to control whether the corresponding section displays in the report and, if the section displays, whether program and/or project information is presented. Each of these parameters work independently from one another and they each have the following options:

  Program and Project The report displays both programs and projects in the section. The program is always displayed first in the list, with the projects following in alphabetical order.

  Program Only The report displays programs only in the section. The program name is displayed in the financial performance section, but none of the other sections display the program name because all information is from the program (no projects are displayed).

  Project Only The report displays projects only in the section. The project names are displayed and they are listed in alphabetical order.

  Do Not Display The report does not display the section. This allows you to hide sections of the report that are not relevant to your program management.

- The Show Team parameter allows you to control whether the team section displays in the report and, if it displays, whether the project team information is summarized by role or presented in detail. The parameter has the following options:

  Summarize by Role The team section of the report aggregates the team allocations from the projects and presents them by role. This is similar to the team tab on the program as it also summarizes team data by role.

  Display Project Teams The team section of the report displays the team allocations in detail for each project. The project names are displayed in alphabetical order and all of their team allocations are also listed, instead of being aggregated by role.

Report Fields and Calculations:

The report displays the program name, program ID, program manager, status, program objective, and finish date. The report includes the status report date and status report update from the most recent program status report as well as the following status report indicators: overall, schedule, scope, and cost and effort. The previous report date is from the prior program status report, based on report date. The status report indicator trending arrows compare the current status report to the prior status report. An upward pointing arrow indicates the status has improved, a downward pointing arrow indicates the status has gotten worse, and a right pointing arrow indicates that there is no change in status or there is no prior status report for comparison.

When the Financial Performance section displays in the report, it includes: program or project name, start date, finish date, financial cost amounts and performance cost amounts. The financial cost amounts include: planned cost or budget, actual cost, and remaining cost. The report has a program financial plan type parameter, allowing you to select whether to display the program planned or budget cost. It also has a project financial plan type parameter, allowing you to select whether to display the project planned or budget cost. There is an additional option when running the report to roll up the amounts from the project to the program or to compare the program amounts to the aggregate of the projects. If the Rollup Project Financials to Program parameter is not checked, then the program amounts represent only the program values and do not include any project amounts. In this case, the report presents an extra row for the Project Total, which is the sum of the project financial cost amounts. There is also an extra row for Variance, which is the difference between the program and the project financial cost amounts. The performance cost amounts include: as of date, BAC, Actual (ACWP), EAC, and projected cost variance. All of these fields, including as of date, are on the schedule & performance properties of the program or project.

When the Key Milestones section displays in the report, it includes: program or project milestone name, milestone ID, status, finish date, baseline finish date, days late, and schedule stoplight.

When the Team section displays in the report and you select summarize by role as the show team option, the report includes: role name, start date, finish date, % complete, allocation, baseline, actuals, ETC, EAC, and projected effort variance. When you select display project teams as the show team option, the report includes: resource name, project role, start date, finish date, % complete, allocation, baseline, actuals, ETC, EAC, and projected effort variance. The amounts are in hours.

When the Risks section displays in the report, it includes: risk name, risk ID, description, priority stoplight, probability, impact, status, response type, and target resolution date.

When the Issues section displays in the report, it includes: issue name, issue ID, description, priority stoplight, status, and target resolution date.

When the Change Requests section displays in the report, it includes: change request name, change request ID, description, priority, status, and expected close date.

This report contains the following calculations:

Overall

This is the overall status field from the program status report. The overall status is a calculated field in Clarity that is the sum of the schedule status, scope status, and cost and effort status fields on the status report.

The stoplight color is determined as follows:

Green	On Track	< 40
Yellow	Minor Variance	>= 40 and < 90
Red	Significant Variance	>= 90

The trending arrow is determined as follows:

Upwards	Overall Status better than the previous Overall Status
Rightwards	No variance
Downwards	Overall Status worse than the previous Overall Status

Database view and column:

odf_cop_prj_statusrpt_v2.cop_overall_status

Schedule

This is the schedule status field from the program status report. The schedule status is determined by the selection of the On Track, Minor Variance or Significant Variance status option.

The stoplight color is determined as follows:

Green	On Track	10
Yellow	Minor Variance	20
Red	Significant Variance	30

The trending arrow is determined as follows:

Upwards	Schedule Status is better than the previous Schedule Status
Rightwards	No variance
Downwards	Schedule Status is worse than the previous Schedule Status

Database view and column:

odf_cop_prj_statusrpt_v2.cop_schedule_status

Scope	This is the scope status field from the program status report. The scope status is determined by the selection of the On Track, Minor Variance or Significant Variance status option. **The stoplight color is determined as follows:** Green — On Track — 10 Yellow — Minor Variance — 20 Red — Significant Variance — 30 **The trending arrow is determined as follows:** Upwards — Scope Status is better than the previous Scope Status Rightwards — No variance Downwards — Scope Status is worse than the previous Scope Status **Database view and column:** odf_cop_prj_statusrpt_v2.cop_scope_status
Cost and Effort	This is the cost and effort status field from the program status report. The cost and effort status is determined by the selection of the On Track, Minor Variance or Significant Variance status option. **The stoplight color is determined as follows:** Green — On Track — 10 Yellow — Minor Variance — 20 Red — Significant Variance — 30 **The trending arrow is determined as follows:** Upwards — Cost and Effort Status is better than the previous Cost and Effort Status Rightwards — No variance Downwards — Cost and Effort Status is worse than the previous Cost and Effort Status **Database view and column:** odf_cop_prj_statusrpt_v2.cop_cost_eft_status
Remaining	The remaining field in the financial performance section of the report displays the difference between planned or budget cost and actual cost, multiplied by the hierarchy allocation percentage. The report displays planned or budget cost based on the financial type parameters selected when running the report. **Formula:** (Planned or Budget Cost – Actual Cost) * Hierarchy Allocation Percentage
Projected Variance	The projected variance field in the financial performance section of the report is the projected cost variance and displays the variance between the EAC cost and baseline cost, multiplied by the hierarchy allocation percentage. **Formula:** (EAC Cost – BAC Cost) * Hierarchy Allocation Percentage
Days Late	Days late in the key milestones section displays the number of days late considering the following: • Whether or not a baseline exists • Milestone status If a baseline exists, then days late is calculated as milestone finish date minus baseline finish date. A positive number indicates that the milestone is late

according to the baseline. A negative number indicates that it is early according to the baseline.

If a baseline exists and the milestone finish date is the same as the baseline finish date, then the milestone is considered late if it is not completed and it was due before today's date. In this case, days late is calculated as today's date minus milestone finish date.

If there is no baseline, then days late is calculated if the milestone is not completed and it was due before today's date. In this case, days late is calculated as today's date minus milestone finish date.

Schedule stoplight color is determined as follows:

Green	On Schedule	<= 0
Yellow	Between 1 and 10 Days Late	> 0 and <= 10
Red	More Than 10 Days Late	> 10

Projected Variance

The projected variance field in the team section of the report is the projected effort variance and displays the variance between the EAC and baseline effort, multiplied by the hierarchy allocation percentage.

Formula:
(EAC - Baseline) * Hierarchy Allocation Percentage

Priority

The priority field is in the risks, issues, and change requests sections. It is based on the priority of the risk, issue, or change request and includes the following values for rating priority: low, medium, and high.

The stoplight color is determined as follows:

Green	Low
Yellow	Medium
Red	High

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
Labor resources and roles are included.	srm_resources.resource_type = 0	Equipment, expense and material resources and roles are excluded.
Key milestones are included. Milestones must have the key task field checked in order to display in the report.	prtask.prismilestone = 1 AND prtask.priskey = 1	Tasks are excluded.
Actual cost under the financial cost heading in the financial performance section is based on financial transaction cost amounts. It only includes transactions processed and posted to WIP.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.

Topic	Database Statement	Additional Explanation
Actual cost under the financial cost heading in the financial performance section is based on financial transaction cost amounts. These amounts are in the currency that is the entity's home currency of the department associated to the investment.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to an investment, the investment home currency is determined by the entity's home currency for the department.
Project cost amounts under the performance cost heading in the financial performance section are dependent upon running the *Update Cost Totals* job, which is available in the Actions pull-down on the task list or baseline list on a project. If you want to update costs across several projects instead of updating costs for only one project, you should run the *Update Earned Value Totals* job from the Reports and Jobs menu.	The cost amounts in the project ODF (Object Description Framework) view are updated when running the *Update Cost Totals* job or the *Update Earned Value Totals* job. The odf_project_v2 view is referenced in the query for cost amounts.	The *Update Cost Totals* job runs the following: Runtime extraction of rates (calculates rates based on the matrix but does not populate the data mart rate table), *Update % Complete* job, and *Update Earned Value Totals* job. The *Update Earned Value Totals* job from the menu is the same as the *Update Cost Totals* job in the Actions pull-down, except it updates all the projects meeting the parameter criteria when run instead of updating only one project.
Projects displaying in the program and the hierarchy allocation percentages are determined by the report investment hierarchy table. The *Update Business Objects Report Tables* job must be run to populate this table for projects to appear in the report and for amounts in the financial performance and team sections to be calculated. Before running this job, the projects must have hierarchy allocation percentages that are greater than 0% or the amounts in the report will be 0.	FROM inv_investments mi INNER JOIN rpt_inv_hierarchy h ON mi.id = h.parent_id INNER JOIN odf_project_v2 ci ON h.child_id = ci.odf_pk	This table is populated by running the *Update Business Objects Report Tables* job with the update investment hierarchy option checked.

Program Budget vs. Forecast by Period

The Program Budget vs. Forecast by Period report displays budget or planned cost, compared to forecast cost, with variances for each period and in total. The report supports four different program financial planning structures/methods: rolling up project financials to the program, program level budgeting with program and project level forecasts, program level budgeting with project level forecasts, and program and project level budgets and forecasts. The report offers the ability to group by up to two financial plan grouping attributes, which may be any combination of the following: Charge Code, Cost Type, Department, Input Type Code, Location, Resource, Resource Class, Role, Transaction Class, User Value 1, and User Value 2.

This report also allows you to drill down to the Program Budget vs. Forecast by Period Detail subreport, by clicking on the program or projects link, to view amounts for the program and/or projects in the program.

Program Budget vs. Forecast by Period (USD)

Online Web Portal Program

Cost Type / Transaction Class		2013-01	2013-02	2013-03	2013-04	2013-05	2013-06	2013-07	2013-08	2013-09	2013-10	2013-11	2013-12	Total
Capital														
External Labor														
Program	Budget	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	60,000	720,000
Projects	Forecast	60,000	60,000	60,000	80,000	85,000	75,000	60,000	60,000	60,000	60,000	60,000	60,000	790,000
Variance	Variance	0	0	0	-20,000	-25,000	-15,000	0	0	0	0	0	0	-60,000
Internal Labor														
Program	Budget	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	50,000	600,000
Projects	Forecast	50,000	50,000	50,000	50,000	64,000	57,000	50,000	50,000	50,000	50,000	50,000	50,000	628,000
Variance	Variance	0	0	0	0	-14,000	-7,000	0	0	0	0	0	0	-21,000
Software														
Program	Budget	5,000	40,000	5,000	5,000	0	0	0	0	0	0	0	0	55,000
Projects	Forecast	5,000	40,000	5,000	5,000	0	0	0	0	0	0	0	0	55,000
Variance	Variance	0	0	0	0	0	0	0	0	0	0	0	0	0
Operating														
External Labor														
Program	Budget	30,000	30,000	30,000	30,000	20,000	20,000	20,000	30,000	30,000	30,000	30,000	30,000	330,000
Projects	Forecast	30,000	30,000	30,000	30,000	20,000	20,000	20,000	25,000	25,000	25,000	20,000	20,000	295,000
Variance	Variance	0	0	0	0	0	0	0	5,000	5,000	5,000	10,000	10,000	35,000
Internal Labor														
Program	Budget	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	480,000
Projects	Forecast	40,000	40,000	35,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	40,000	475,000
Variance	Variance	0	0	5,000	0	0	0	0	0	0	0	0	0	5,000
Travel														
Program	Budget	10,000	10,000	5,000	0	0	0	5,000	5,000	0	0	0	0	35,000
Projects	Forecast	10,000	10,000	5,000	0	0	0	5,000	5,000	0	0	0	0	35,000
Variance	Variance	0	0	0	0	0	0	0	0	0	0	0	0	0

Report Example: Financial Structure of Program Budget and Project Forecast

Program Planned vs. Forecast by Period Detail Subreport

The Program Planned vs. Forecast by Period Detail subreport displays amounts, depending upon which financial structure is selected when running the report, for each period and in total. It shows amounts separately for the program and/or its projects to give you visibility into the amounts that contribute to the main report aggregates.

Program Budget vs. Forecast by Period Detail (USD)

Online Web Portal Program

Cost Type / Transaction Class	2013-01	2013-02	2013-03	2013-04	2013-05	2013-06	2013-07	2013-08	2013-09	2013-10	2013-11	2013-12	Total
Capital													
External Labor													
Online Order Catalog													
Forecast	0	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	25,000	275,000
Online Order Entry													
Forecast	0	0	10,000	30,000	35,000	25,000	20,000	20,000	20,000	20,000	20,000	20,000	220,000
eCommerce Portal													
Forecast	60,000	35,000	25,000	25,000	25,000	25,000	15,000	15,000	15,000	15,000	15,000	15,000	285,000

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- The program or one of its projects must have at least one financial plan for the program to display in the report. The report has a financial plan type parameter with the values of budget or planned so you may run the report for budget or cost plan amounts. If the financial plan type parameter is budget, then the program or one of its projects must have at least one approved budget to display in the report. If the financial plan type parameter is planned, then the program or one of its projects must have at least one cost plan to display in the report.
- The program or one of its projects must have a department OBS unit associated to it in order to create a cost plan on the program or project. For a department OBS to be available to associate to a program or project, you must first set up a department OBS and a location OBS (*Administration/Organization and Access-OBS*) and associate them to the project object. Next, you must create an entity (*Administration/Finance-Setup/Entities*) and associate the department OBS and location OBS to the entity. On the entity, you must create fiscal time periods (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) for the period types (monthly, 13 periods, quarterly, annually) that you want to reference in creating financial plans. If you don't intend to plan by annual fiscal periods, you must still create them because the report requires them as explained in the next bullet item.
- There must be fiscal time periods, with a period type of annually, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*) that cover the periods for which you have program and project financial plans in Clarity. For example, if you have programs or projects with monthly or quarterly budgets or cost plans for 2012 and 2013, then you must have annual fiscal periods created for 2012 and 2013 even though you aren't creating budgets or cost plans by these annual periods. The report uses these annual periods to convert the budget and cost plan amounts entered so they may be reported by fiscal year, independent of how they are entered in the financial plans.
- There must be fiscal time periods, with a period type of monthly or 13 periods, created (*Administration/Finance-Setup/Entities-Fiscal Time Periods Tab*). There is an as of date parameter that is evaluated to the end of the fiscal period in which it falls, by comparing it to fiscal periods with a type of monthly or 13 periods, whichever you have set up in your system. If you do not have fiscal periods with a type of monthly or 13 periods, then the report will not be able to evaluate the as of date parameter to a fiscal period to calculate actuals to date and forecast (calculated).
- The project amounts in the report are dependent upon the projects in the program having hierarchy allocation percentages that are greater than 0%. If the allocation percentage is set to 0% on a project, then the amounts in the report will be 0. The allocation percentage is set on the hierarchy tab of the program or project. If setting from the project, you must navigate to the 'parents' submenu under the hierarchy tab.
- The report is dependent upon running the *Update Business Objects Report Tables* job with the update investment hierarchy option checked. If this job is not run, the program and its projects will not display. Note: The hierarchy allocation percentages on the projects must be set to values greater than 0% before running this job.

Report Definition:

Name:	Program Budget vs. Forecast by Period
ID:	CSP_PRG_BudgetForecastByPeriod
Description:	Program Budget vs. Forecast by Period (CSP)
Executable Name:	/CSP/Program Budget vs Forecast By Period

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Program OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Program Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Program param_program	Browse Multiple-select	Portlet Programs COP.PORTLET_PROGRAMS	No
Program Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Project Status param_prj_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Financial Structure param_fin_struct	Pull-down Single-select	Report (Program Financial Structure) CSP_RPT_PRG_FIN_STRUCTURE	Yes Program Budget and Project Forecast
Entity param_entity	Pull-down Single-select	Entity Browse SCH_BROWSE_ENTITY	Yes
Fiscal Year param_year	Browse Multiple-select	Report (Fiscal Years) CSP_RPT_FIN_FISCAL_YEAR	Yes
Period Type param_period_type	Pull-down Single-select	Period Type PERIOD_TYPE	Yes Monthly
As of Date param_as_of	Relative Date		No End of Previous Month
Report Currency param_curr	Pull-down Single-select	Report (Currencies) CSP_RPT_FIN_CURRENCY	Yes
Include Inactive Programs? param_prg_active	Checkbox		No Unchecked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Financial Plan Group By 1 param_group1	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	Yes
Financial Plan Group By 2 param_group2	Pull-down Single-select	LOOKUP_FIN_GROUPING_ATTRIBUTES LOOKUP_FIN_GROUPING_ATTRIBUTES	No
Language param_language	Hidden		Yes Passed via Clarity

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Program Status: All, Approved, Unapproved
Project Status: All, Approved, Unapproved
Financial Plan Type: Budget, Planned
Financial Structure: Rollup Project Financials to Program, Program Budget and Program/Project Forecast, Program Budget and Project Forecast, Program/Project Budget and Forecast
Period Type: 13 Periods, Weekly, Semi Monthly, Monthly, Quarterly, Annually
Financial Plan Group By 1 and 2: Charge Code, Cost Type, Department, Input Type Code, Location, Resource, Resource Class, Role, Transaction Class, User Value 1, User Value 2

Parameter Explanations:

- The Program OBS parameter allows you to control which programs display in the report. When you select an OBS unit in this parameter, the report will display the programs attached to the OBS unit you select and the programs attached to any OBS units that are descendent units of the OBS unit you select.
- The Financial Plan Type parameter allows you to select which type of financial plan to include in the report. You may run the report to display budget amounts from the budget or planned amounts from the cost plan. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

Budget	The budget amounts in the report are based on the current approved budget. The above screen capture displays the amounts as budget because this is the parameter value selected when running the report.
Planned	The planned amounts in the report are based on the current cost plan of record. The above screen capture was run with the option of budget. If it were run with the option of planned, then it would display the word planned where it displays the word budget in the report title and row labels.

- The Financial Structure parameter allows you to control how budget or planned and forecast amounts are aggregated and displayed in the report. The following options are available:

  Rollup Project Financials to Program
  With this financial structure option, budgets and forecasts are maintained on projects and rolled up to the program. If budgets and forecasts are also maintained on the program, those amounts are included as well.

Program Budget and Program/Project Forecast
With this financial structure option, budgets and forecasts are maintained on programs; forecasts are maintained on projects.

Program Budget and Project Forecast
With this financial structure option, budgets are maintained on programs; forecasts are maintained on projects. Note: The above screen capture was run with the financial structure parameter set to this option.

Program/Project Budget and Forecast
With this financial structure option, budgets and forecasts are maintained on both programs and projects.

- The Entity parameter is required because the report displays amounts by fiscal period. In Clarity, fiscal periods are defined for each entity. In order to report across consistent fiscal periods, all programs and projects in the report must belong to the same entity. The entity is determined via the department associated to the program or project.
- The Fiscal Year parameter allows you to control which costs, from the financial plans and actual transactions, are included in the report. When you select a fiscal year, the budget or planned amounts are restricted to only display the amounts within the fiscal year you select. The same applies to actual amounts. You may view costs for one or several fiscal years, regardless of whether the financial plans are entered by period types of monthly, 13 periods, quarterly, or annually.
- The Period Type parameter allows you to change the type of fiscal period that displays across the columns of the report. The following options are available:

13 Periods	The report displays amounts by the 13 period fiscal period type.
Weekly	The report displays amounts by the weekly fiscal period type.
Semi Monthly	The report displays amounts by the semi-monthly fiscal period type.
Monthly	The report displays amounts by the monthly fiscal period type.
Quarterly	The report displays amounts by the quarterly fiscal period type.
Annually	The report displays amounts by the annually fiscal period type.

- The As of Date parameter allows you to enter the fiscal period finish date that will be used to calculate the forecast cost amounts in the report. You should enter a date that is the end of a fiscal period in this parameter. If you enter a date that is not the finish date of a fiscal period, then the report will determine which fiscal period the date you enter resides and it will use the finish date of that fiscal period for the report calculations. The report looks at fiscal periods with a period type of monthly or 13 periods when it determines the finish date this way.
- The Report Currency parameter allows you to convert the amounts in the report to one currency for reporting purposes. If you do not use multi-currency then all your programs and projects will be in the same currency and you will only have one currency to select in the report currency parameter. In this case, the report displays amounts in the entity's home currency of the department associated to the program or project.

  If you use multi-currency, then you will have the option to select any currency you have active in Clarity as the report currency. When you select a currency in the parameter, the amounts in the report will be converted into that currency per the exchange rates set up in Clarity, if the report currency is different from the program or project currency. In order to use this Report Currency parameter to convert currencies, you must have multi-currency enabled in your installation of Clarity (*Administration/Finance-Setup/Defaults*). In the Currency section, there is a System field that must be set to Multi Currency. In addition to multi-currency being enabled, you must also activate the currencies you want to use in Clarity (*Administration/Finance-Setup/Currency*). Lastly, you must set up Foreign Exchange rates in Clarity (*Administration/Finance-Setup/Foreign Exchange Rates*). The report uses exchange rates with an Exchange Rate Type of 'Average' so you must set up exchange rates of this type.

- The report has Financial Plan Group By 1 and Financial Plan Group By 2 parameters that allow you to control how the report is grouped. You may group the report by up to two options, which may be any combination of the following grouping options:

Charge Code	This option groups the report by charge code.
Cost Type	This option groups the report by cost type.
Department	This option groups the report by department.
Input Type Code	This option groups the report by input type code.
Location	This option groups the report by location.
Resource	This option groups the report by resource.
Resource Class	This option groups the report by resource class.
Role	This option groups the report by role.
Transaction Class	This option groups the report by transaction class.
User Value 1	This option groups the report by user value 1.
User Value 2	This option groups the report by user value 2.

Report Fields and Calculations:

The first column of the report is determined by the values selected in the financial plan group by 1 and financial plan group by 2 parameters. The report displays budget or planned and forecast cost amounts with variances. If the financial plan type parameter is set to budget, then the report displays budget cost, forecast cost, and variance. For budgets, the report only includes the current approved budget amounts. If the financial plan type parameter is set to planned, then the report displays planned cost, forecast cost, and variance. For planned, the report only includes the current plan of record cost plan amounts.

The report displays up to twelve period columns, and a total column, for all fiscal period types except the 13 period type. The report displays up to thirteen period columns, and total column, if the period type parameter is 13 periods. You have the option to run the report for multiple fiscal years, which may result in the number of periods exceeding these limits. In this case, the report will display the additional fiscal periods on multiple pages.

This report contains the following calculations, which are all subject to the fiscal year parameter:

Budget or Planned

This is the approved budget or planned cost for the cost plan of record, multiplied by the hierarchy allocation percentage for child projects.

Forecast

Actual To Date + Forecast Remaining, multiplied by the hierarchy allocation percentage for child projects.

Actual To Date is the actual cost in fiscal periods prior to the date entered in the as of date parameter. For example, if as of date parameter is 05/31/2012, then the actual to date is the actual cost thru the fiscal period ending 05/31/2012.

Forecast Remaining is the planned cost in the cost plan of record after the date entered in the as of date parameter. For example, if the as of date parameter is 05/31/2012, then forecast remaining is planned cost in fiscal periods after the fiscal period ending 05/31/2012.

Variance

Budget or Planned – Forecast, multiplied by the hierarchy allocation percentage for child projects.

Variance background color is as follows:

Red	The Forecast exceeds Budget or Planned, which means the variance is a negative number.

The report also displays different sections and rows depending upon the value selected in the financial structure parameter when running the report as follows:

- **Rollup Project Financials to Program**
  The report displays a program section with budget or planned, forecast, and variance. These program amounts are the aggregate of the program and its projects; this is similar to how the hierarchy tab in the program totals data.

  The report also includes 'Program' links that allow you to drill down to the subreport. The subreport displays budget or planned, forecast, and variance amounts separately for the program and its projects to give you visibility into the amounts that contribute to the program aggregates in the main report.

- **Program Budget and Program/Project Forecast**
  The report displays a program section with budget or planned, forecast, and variance amounts; a projects section with forecast amounts for projects in the program; and a variance section with the total of budget or planned, forecast, and variance amounts from the program and projects sections. The variance section displays the program and project amounts in aggregate.

  The report also includes 'Projects' links that allow you to drill down to the subreport. The subreport displays forecast amounts separately for the projects in the program to give you visibility into the amounts that contribute to the project forecast aggregates in the main report.

- **Program Budget and Project Forecast**
  The report displays a program row with budget or planned amounts; a projects row with forecast amounts for projects in the program; and a variance row with the difference between the program and project amounts.

  The report also includes 'Projects' links that allow you to drill down to the subreport. The subreport displays forecast amounts separately for the projects in the program to give you visibility into the amounts that contribute to the project forecast aggregates in the main report.

  Note: The above screen capture was run with the financial structure parameter set to this option.

- **Program/Project Budget and Forecast**
  The report displays a program section with budget or planned, forecast, and variance amounts; a projects section with budget or planned, forecast, and variance amounts for projects in the program; and a variance section with budget or planned remaining, program budget or planned, forecast, and variance amounts. These amounts in the variance section are calculated as follows:

Budget or Planned Remaining	This is the difference between the program budget or planned amount and the projects budget or planned amount.
Program Budget or Planned	This is the same as the budget or planned amount in the program section. It is displayed in the variance section because it is used in another calculation in the section.
Forecast	This is the sum of the forecast amounts in the program and projects sections.
Variance	This is the difference between the program budget or planned and forecast amounts in the variance section.

  The report also includes 'Projects' links that allow you to drill down to the subreport. The subreport displays budget or planned, forecast, and variance amounts separately for the projects in the program to give you visibility into the amounts that contribute to the project aggregates in the main report.

Subreport Fields and Calculations:

The amounts that display in the subreport are dependent upon the financial structure selected when running the report. This is explained in the report fields and calculations section above. The subreport displays the same columns, with the same calculations and background color, as the main report.

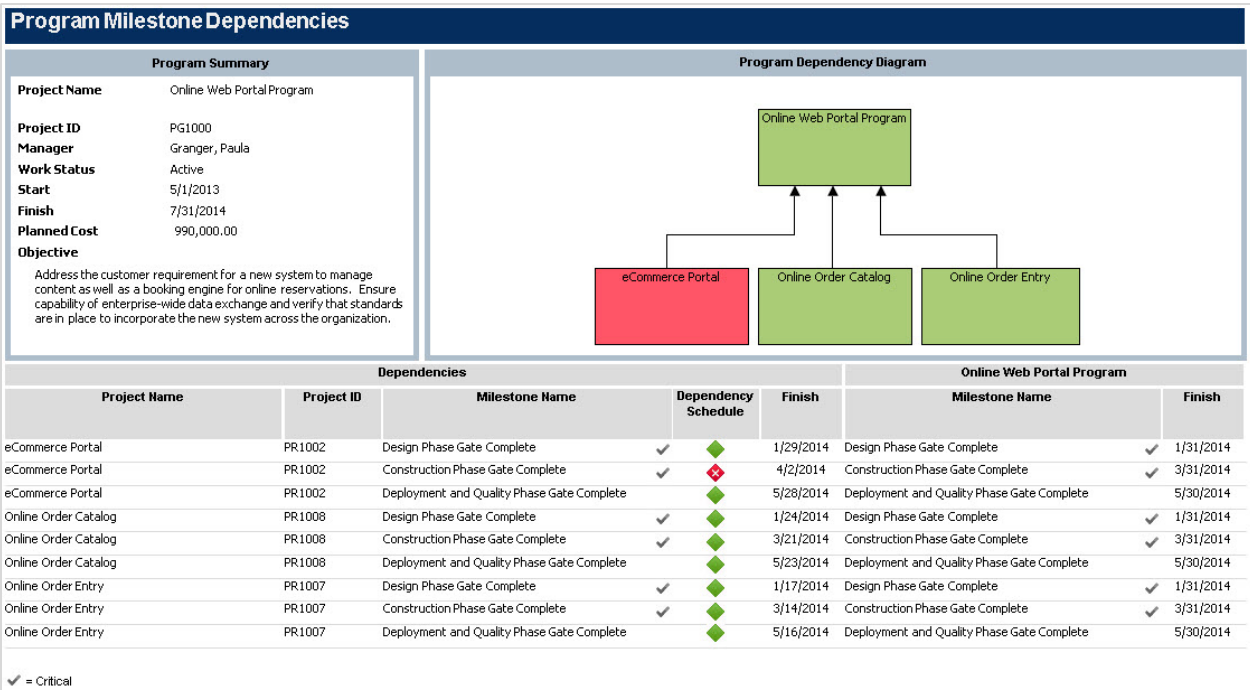
Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	
The current approved budget or cost plan of record is the only financial plan included.	fin_plans.is_plan_of_record = 1	The plan of record for the cost plan is the one designated as plan of record. The plan of record for the budget is current approved budget.
Budget and cost plans are included.	fin_plans.sub_plan_type = 0	Benefit plans are excluded (fin_plans.sub_plan_type = 1). The financial plans table has cost plan, budget, and benefit plan records.
Actual financial transaction cost amounts only include transactions processed and posted.	ppa_wip.status = 0	Financial transactions with a status of 0 are the final posted transactions. Any other status is a transaction that is adjusted, reversed or updated and those transactions are excluded.
Actual financial transaction cost amounts are in the currency that is the entity's home currency of the department associated to the project.	ppa_wip_values.currency_type = 'HOME'	Each entity has a department OBS associated to it. Each entity also has a home currency set on the entity. When a department is associated to a project, the project home currency is determined by the entity's home currency for the department.
Currency conversions are calculated based on the foreign exchange rates set up with a type of average. They are also based on the current date so the exchange rate effective date must be the same or earlier than the current date. With these conditions met, the exchange rate effective date closest to the current date is the exchange rate that is used for the conversions.	FIN_CONVERT_CURRENCY_FCT(NVL(SUM(ROUND(odf_ssl_cst_dtl_cost.slice * (odf_ssl_cst_dtl_cost.finish_date - odf_ssl_cst_dtl_cost.start_date),2)) 'AVERAGE',SYSDATE,i.currency_code,NVL('{ ?param_curr}',i.currency_code))	The Foreign Exchange rates (*Administration/Finance-Setup/Foreign Exchange Rates*) must be set up with an Exchange Rate Type of 'Average' because this is the type the report references.
The Financial Plan insta-slice table is referenced for the budget and planned amounts because these amounts are calculated based on the fiscal year parameter.	prj_blb_slicerequests.request_name = 'costplandetail::cost::segment' AND prj_blb_slicerequests.id = odf_ssl_cst_dtl_cost.slice_request_id AND odf_ssl_cst_dtl_cost.prj_object_id = fin_cost_plan_details.id	Financial plan data is stored in the insta-slice tables so this table must be queried for amounts if the report has a fiscal period parameter. The main report and subreport display amounts based on the fiscal year parameter selected.

Topic	Database Statement	Additional Explanation
Programs and projects displaying in the report and the hierarchy allocation percentages are determined by the report investment hierarchy table. The *Update Business Objects Report Tables* job must be run to populate this table for programs and projects to appear in the report and for project amounts to be calculated. Before running this job, the projects must have hierarchy allocation percentages that are greater than 0% or the project amounts in the report will be 0.	FROM inv_projects mp INNER JOIN rpt_inv_hierarchy h ON mp.prid = h.parent_id INNER JOIN inv_projects cp ON h.child_id = cp.prid	This table is populated by running the *Update Business Objects Report Tables* job with the update investment hierarchy option checked.

Program Milestone Dependencies

The Program Milestone Dependencies report displays programs and their inter-project predecessor milestone dependencies. This gives you visibility between your program milestones and predecessor dependent milestones in other projects. The report displays dependencies as a diagram, as well as a detailed list. The diagram displays a maximum of five predecessor dependencies to your program. The detailed list does not have this limit and shows all predecessor dependencies. The report contains program summary and milestone information, including a dependency schedule stoplight and finish dates. It also includes a checkmark icon indicating that the milestone or dependent milestone is on the critical path.



Program Milestone Dependencies

Program Summary

Project Name	Online Web Portal Program
Project ID	PG1000
Manager	Granger, Paula
Work Status	Active
Start	5/1/2013
Finish	7/31/2014
Planned Cost	990,000.00
Objective	

Address the customer requirement for a new system to manage content as well as a booking engine for online reservations. Ensure capability of enterprise-wide data exchange and verify that standards are in place to incorporate the new system across the organization.

Program Dependency Diagram

Dependencies						Online Web Portal Program		
Project Name	**Project ID**	**Milestone Name**		**Dependency Schedule**	**Finish**	**Milestone Name**		**Finish**
eCommerce Portal	PR1002	Design Phase Gate Complete	✓		1/29/2014	Design Phase Gate Complete	✓	1/31/2014
eCommerce Portal	PR1002	Construction Phase Gate Complete	✓		4/2/2014	Construction Phase Gate Complete	✓	3/31/2014
eCommerce Portal	PR1002	Deployment and Quality Phase Gate Complete			5/28/2014	Deployment and Quality Phase Gate Complete		5/30/2014
Online Order Catalog	PR1008	Design Phase Gate Complete	✓		1/24/2014	Design Phase Gate Complete	✓	1/31/2014
Online Order Catalog	PR1008	Construction Phase Gate Complete	✓		3/21/2014	Construction Phase Gate Complete	✓	3/31/2014
Online Order Catalog	PR1008	Deployment and Quality Phase Gate Complete			5/23/2014	Deployment and Quality Phase Gate Complete		5/30/2014
Online Order Entry	PR1007	Design Phase Gate Complete	✓		1/17/2014	Design Phase Gate Complete	✓	1/31/2014
Online Order Entry	PR1007	Construction Phase Gate Complete	✓		3/14/2014	Construction Phase Gate Complete	✓	3/31/2014
Online Order Entry	PR1007	Deployment and Quality Phase Gate Complete			5/16/2014	Deployment and Quality Phase Gate Complete		5/30/2014

✓ = Critical

Report Prerequisites:

- The program must have at least one milestone with a dependency to a milestone in a separate project to display in the report.
- For the program summary section, the program must have budgeted or planned cost entered on the financial summary of the program. If the program has a detailed budget or cost plan, then the approved budget amount or cost plan amount for the plan of record will display based on the financial plan type parameter selected when running the report.

Report Definition:

Name:	Program Milestone Dependencies
ID:	CSP_PRG_MilestoneDependencies
Description:	Program Milestone Dependencies (CSP)
Executable Name:	/CSP/Program Milestone Dependencies

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Program OBS param_i_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Program Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Program param_investment	Browse Multiple-select	Portlet Programs COP.PORTLET_PROGRAMS	No
Program Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Work Status param_work_status	Pull-down Multiple-select	Report (Work Statuses) CSP_RPT_INV_WORK_STATUS	No
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	Yes Planned
Milestone From param_start_date	Relative Date		No
Milestone To param_end_date	Relative Date		No
Show Grid Detail? param_show_grid	Checkbox		No Checked
Include Inactive Programs? param_prg_active	Checkbox		No Unchecked
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Program Status: All, Approved, Unapproved
Work Status: Requested, Active, On Hold, Cancelled, Complete
Financial Plan Type: Budget, Planned

Parameter Explanations:

- The Program OBS parameter allows you to control which programs display in the report. When you select an OBS unit in this parameter, the report will display the programs attached to the OBS unit you select and the programs attached to any OBS units that are descendent units of the OBS unit you select.

- The Work Status parameter is associated to the Work Status lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.
- The Financial Plan Type parameter allows you to select which type of financial plan cost amount to display in the program summary section of the report. You may run the report to display the budgeted or planned cost amount entered on the financial summary of the program. If the program has a detailed budget or cost plan, then the approved budget amount or cost plan amount for the plan of record displays. The Financial Plan Type parameter works as follows:

Budget	The report displays budgeted cost. The above screen capture was run with the option of planned. If it were run with the option of budget, then it would display the word budgeted where it displays the word planned in the program summary section of the report.
Planned	The report displays planned cost. The above screen capture displays planned cost in the program summary section because this is the parameter value selected when running the report.

- The Milestone From and Milestone To parameters determine the finish date of the milestones that display in the report. If dates are entered, the report will include milestones with finish dates within the range of dates entered in the parameters. This allows you to control which inter-project dependencies display in the report. The diagram displays a maximum of five predecessor dependencies, but you can leverage the date parameters to determine which appear if you have more than five dependencies.
- The Show Grid Detail parameter controls whether the dependencies displayed in the diagram also display in a table below the diagram. The diagram displays a maximum of five predecessor dependencies. The detailed table does not have this limit and shows all inter-project dependencies. If the parameter is checked, a table showing the dependencies will display below the diagram for each program. If the parameter is not checked, the table will not display.

Report Fields and Calculations:

The report displays the program name, program ID, program manager, work status, start date, finish date, planned or budgeted cost, and objective in the program summary section. The report has a financial plan type parameter, allowing you to select whether to display the planned or budgeted cost.

The report displays only programs with inter-project predecessor milestone dependency relationships. The report includes a diagram as a visual representation of these inter-project dependencies. The diagram uses rectangles to represent the program and its dependent projects. The program is at the top of the diagram; the predecessor projects are located below the program. The dependency relationships are represented by lines connecting dependent projects to the program, with the arrows pointing from the predecessor projects to the successor program. The diagram displays a maximum of five predecessor projects. If there are more than five inter-project dependencies, the diagram will display the first five projects in alphabetical order. The other dependencies will display as part of the grid when you check the Show Grid Detail parameter. The report also has Milestone From/To parameters to control which inter-project dependencies display in the report.

When the Show Grid Detail parameter is checked the report includes a table that displays information about each project dependency associated to the program. The project dependency information is displayed in the first five columns and includes: dependent project name, dependent project ID, dependent milestone name, dependency schedule stoplight, and dependent milestone finish date. The program information is displayed in the last two columns and includes: milestone name and milestone finish date. The program's name displays above these columns. The report also displays a checkmark icon, to the right of milestone name, indicating that the program milestone or dependent milestone is critical.

This report contains the following calculations:

Dependency Schedule	The dependency schedule stoplight is the number of days the milestone is late and considers the following: • Whether or not a baseline exists • Milestone status If a baseline exists, then days late is calculated as milestone finish date minus baseline finish date. A positive number indicates that the milestone is late according to the baseline. A negative number indicates that it is early according to the baseline. If a baseline exists and the milestone finish date is the same as the baseline finish date, then the milestone is considered late if it is not completed and it was due before today's date. In this case, days late is calculated as today's date minus milestone finish date. If there is no baseline, then days late is calculated if the milestone is not completed and it was due before today's date. In this case, days late is calculated as today's date minus milestone finish date. **Dependency Schedule stoplight color is determined as follows:** Green On Schedule <= 0 Red Late > 0
Dependency Diagram	The dependency diagram uses rectangles to represent the program and its dependent projects. The program is at the top of the diagram; the predecessor projects are located below the program. The color of the rectangle for the dependent projects is determined by the dependency schedule stoplight of their milestones. If a dependent project has at least one milestone with a red dependency schedule stoplight, then the rectangle in the diagram is red for that dependent project. The color of the rectangle for the program is based on the program's schedule, which is the number of days the program is late, and considers program progress as follows: Days late is calculated if the program is not completed and it was due before today's date. The number of days late is calculated as today's date minus program finish date. **Schedule color is determined as follows:** Green On Schedule <= 0 Red Late > 0

Report Security and Technical Details:
Security is determined by project view rights.

Topic	Database Statement	Additional Explanation
Templates are excluded.	inv_projects.is_template = 0	

Chapter 7: Portfolio Management

This section contains the following topic:

Crystal Reports

The portfolio management reports provide visibility into waterline and rank information of investments in a portfolio. The reports also provide information about portfolio distributed target, investment budget, and investment planned amounts, indicating the differences between portfolios and portfolio plans.

The reports include:

Portfolio Plan Comparison

The Portfolio Plan Comparison report is grouped by portfolio and displays distributed target and above waterline investment cost and role amounts. The report provides visibility into portfolio amounts, allowing a comparison of up to three portfolio plans. The change amount and change percentage for each plan, compared to portfolio, are presented.

Portfolio Plan Comparison

Business Technologies

	Portfolio	Goal Alignment and Required			Cost Reduction			High ROI / Low Risk		
Description	**Amount**	**Amount**	**Change**	**%**	**Amount**	**Change**	**%**	**Amount**	**Change**	**%**
Distributed Target Totals										
Total Cost	2,220,000.00	2,220,000.00	0.00	0	1,776,000.00	-444,000.00	-20	2,220,000.00	0.00	0
Capital Cost	720,000.00	720,000.00	0.00	0	576,000.00	-144,000.00	-20	720,000.00	0.00	0
Operating Cost	1,500,000.00	1,500,000.00	0.00	0	1,200,000.00	-300,000.00	-20	1,500,000.00	0.00	0
Benefit	6,000,000.00	6,000,000.00	0.00	0	4,800,000.00	-1,200,000.00	-20	6,000,000.00	0.00	0
Role: Overall Total	15,000.00	15,000.00	0.00	0	12,000.00	-3,000.00	-20	15,000.00	0.00	0
Role: Architect	1,200.00	1,200.00	0.00	0	960.00	-240.00	-20	1,200.00	0.00	0
Role: Business Analyst	2,400.00	2,400.00	0.00	0	1,920.00	-480.00	-20	2,400.00	0.00	0
Role: Developer	4,800.00	4,800.00	0.00	0	3,840.00	-960.00	-20	4,800.00	0.00	0
Role: Project Manager	4,800.00	4,800.00	0.00	0	3,840.00	-960.00	-20	4,800.00	0.00	0
Role: Test Engineer	1,200.00	1,200.00	0.00	0	960.00	-240.00	-20	1,200.00	0.00	0
Role: Total	14,400.00	14,400.00	0.00	0	11,520.00	-2,880.00	-20	14,400.00	0.00	0
Role: Variance	600.00	600.00	0.00	0	480.00	-120.00	-20	600.00	0.00	0
Above Waterline Investment Totals										
Planned Cost	2,105,000.00	2,161,650.00	56,650.00	3	1,690,800.00	-414,200.00	-20	2,149,760.00	44,760.00	2
Planned Capital Cost	1,586,200.00	1,621,850.00	35,650.00	2	1,306,400.00	-279,800.00	-18	1,374,600.00	-211,600.00	-13
Planned Operating Cost	518,800.00	539,800.00	21,000.00	4	384,400.00	-134,400.00	-26	775,160.00	256,360.00	49
Planned Benefit	3,675,000.00	3,335,000.00	-340,000.00	-9	3,075,000.00	-600,000.00	-16	4,200,000.00	525,000.00	14
Role: Architect	1,694.00	1,718.00	24.00	1	1,432.00	-262.00	-15	1,862.00	168.00	10
Role: Business Analyst	1,056.00	1,456.00	400.00	38	840.00	-216.00	-20	1,632.00	576.00	55
Role: Developer	3,756.00	3,732.00	-24.00	-1	3,168.00	-588.00	-16	3,220.00	-536.00	-14
Role: Project Manager	2,152.00	2,192.00	40.00	2	1,944.00	-208.00	-10	2,248.00	96.00	4
Role: Test Engineer	1,942.00	2,206.00	264.00	14	1,652.00	-290.00	-15	1,698.00	-244.00	-13
Role: Other Roles	4,584.00	4,784.00	200.00	4	1,528.00	-3,056.00	-67	5,104.00	520.00	11
Role: Total	15,184.00	16,088.00	904.00	6	10,564.00	-4,620.00	-30	15,764.00	580.00	4
Above Waterline Investment Metrics										
Planned NPV	1,512,962.00	1,860,870.00	347,908.00	23	1,338,511.00	-174,451.00	-12	2,469,439.00	956,477.00	63
Planned Cost per Role	138.63	134.36	-4.27	-3	160.05	21.42	15	136.37	-2.26	-2
Planned Benefit per Role	242.03	207.30	-34.73	-14	291.08	49.05	20	266.43	24.40	10
Planned Profit per Role	103.40	72.93	-30.47	-29	131.03	27.63	27	130.06	26.66	26
Above Waterline Investment Counts										
All Investments	7	7	0	0	6	-1	-14	8	1	14
Project	7	7	0	0	6	-1	-14	8	1	14

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- There must be at least one portfolio created (*Home/Portfolio Management -Portfolios*) when running the report or the report will display a message that there are no results that match your criteria.
- There must be at least one portfolio plan created in order to compare a plan against the actual portfolio otherwise the report will display portfolio amounts only.
- The report has a parameter that allows you to compare the portfolio to the portfolio plan of record. The portfolio must have at least one portfolio plan marked as plan of record in order for the Compare Portfolio to Plan of Record parameter to work.
- There must be distributed target amounts entered in the targets tab of the portfolio for the report to display distributed target amounts.
- There must be at least one portfolio investment that is above the waterline on the waterlines tab of the portfolio for the report to display amounts in the following sections: Above Waterline Investment Totals, Above Waterline Investment Metrics, and Above Waterline Investment Counts.
- The portfolio contents must be defined and the portfolio must be synchronized for the report to display investment data. The portfolio investment data is synchronized by running the *Synchronize portfolio investments* job. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included.

  This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, their data will display in the report. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.
- The actual investments must have data in order for the portfolio sync to copy the data from the actual investments to the portfolio investments. They must have planned cost or budgeted cost and benefit amounts entered in the financial summary properties to sync these amounts to the portfolio and display in the above the waterline investment sections of the report. If the investments have detailed cost plans or budget plans, and benefit plans, created under the financial plans tab, then the planned or budgeted cost and benefit amounts on the financial summary properties will be read only and set according to the amounts in the detailed financial plans. In this case, the cost plan amount for the plan of record or approved budget amount, with associated benefits, will display on the financial summary properties and in the report. Note: These investment cost and benefit amounts may be manually entered or modified for plans in a portfolio.
- The investments must have at least one resource or role on the investment team in order for the team member allocation demand amounts to sync to the portfolio and display in the above the waterline investment sections of the report. Note: These investment role allocation demand amounts may be manually entered or modified for plans in a portfolio.
- This report is also accessible from the *Compare* button on the plans tab in a portfolio (*Home/Portfolio Management -Portfolios*). The *Compare* button displays reports that meet the following conditions: (1) The report definition is associated to the 'Portfolio Plans Compare' category on the associated categories tab of the report definition (*Administration/Data Administration-Reports and Jobs*) and

(2) The report definition has a portfolio plan browse parameter with the bind parameter code of 'param_plan'.

There must be at least one portfolio plan created in order to run the report from the *Compare* button because it requires that you select which plans to include in the report. The report supports comparing up to three plans. You may select any number of plans, up to three plans. If you select more than three plans, the report will display the plan that is marked as the plan of record and the two most recently created plans that are not the plan of record. If there is no plan of record, the report displays the three most recently created plans.

Report Definition:

Name:	Portfolio Plan Comparison
ID:	CSP_PFM_PortPlanComparison
Description:	Portfolio Plan Comparison (CSP)
Executable Name:	/CSP/Portfolio Plan Comparison

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Portfolio OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Portfolio Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Portfolio Stakeholder param_stakeholder	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Portfolio param_portfolio	Browse Multiple-select	Active Portfolio browse PFM_BROWSE_ACTIVE_PORTFOLIOS	No
Compare Portfolio to Plan of Record? param_plan_of_rec	Checkbox		No Unchecked
Portfolio Plan param_plan	Browse Multiple-select	Report (Portfolio Plans) CSP_RPT_PFM_PLAN	No
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	No Planned
Include Inactive Portfolios? param_p_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:

Financial Plan Type: Budget, Planned

Parameter Explanations:

- The Portfolio OBS parameter allows you to control which portfolios display in the report. When you select an OBS unit in this parameter, the report will display the portfolios attached to the OBS unit you select and the portfolios attached to any OBS units that are descendent units of the OBS unit you select.
- The Compare Portfolio to Plan of Record parameter compares each portfolio to the portfolio plan marked as the Plan of Record, if there is one. This allows you to run the report comparing portfolio amounts to plan of record amounts, without having to browse and select specific plans for the comparison.
- The Portfolio Plan parameter allows you to select specific portfolio plans to display in the report. The report supports comparing up to three plans for each portfolio. If you select more than three plans for one portfolio, the report displays the plan that is marked as the plan of record and the two most recently created plans. If there is no plan of record, the report displays the three most recently created plans of the plans you selected. The parameter uses the same logic if you do not select any plans in the parameter; it displays plan of record first and then the most recent plans.
- The Financial Plan Type parameter allows you to select which type of financial cost and benefit to include in the report: budgeted or planned. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

Budget	The budgeted cost and benefit amounts in the report are from the investment financial summary properties. These fields are populated from the approved budget plan, if there is a detailed budget plan on the investment, and its associated benefit plan.
Planned	The planned cost and benefit amounts in the report are from the investment financial summary properties. These fields are populated from the cost plan that is the plan of record, if there is a detailed cost plan on the investment, and its associated benefit plan.

Report Fields and Calculations:

The report is grouped by portfolio and displays the following four sections for each portfolio: distributed target totals, above waterline investment totals, above waterline investment metrics, and above waterline investment counts. Each section displays the following columns: description of the line item, portfolio amounts, and portfolio plan amounts. The portfolio plan amounts are followed by change amount and % columns, which indicate if the plan amount is an increase or decrease to the portfolio amount. The report supports comparing up to three plans. You may select any number of plans, up to three plans. If you select more than three plans, the report will display the plan that is marked as the plan of record and the two most recently created plans that are not the plan of record. If there is no plan of record, the report displays the three most recently created plans. From left to right in the report, the plans are displayed in this order: plan of record (if it exists) and then any other plans sorted in descending order of most recent to oldest.

The distributed target totals section includes the following line items: total cost, capital cost, operating cost, benefit, role overall total, listing of each individual role included in the portfolio targets, role total, and role variance. The above waterline investment totals section includes the following line items: planned cost, planned capital cost, planned operating cost, planned benefit, listing of each individual role included in the portfolio targets, 'Other Roles' line item for additional investment roles not included in the targets, and role total. The above waterline investment metrics section includes the following line items: planned NPV, planned cost per role, planned benefit per role, and planned profit per role. The above waterline investment counts section includes the following line items: all investments and each investment type included in the portfolio.

The amounts that display in the report are amounts that fall within the portfolio planning horizon, which is the time window between the portfolio start and finish dates. For portfolio plan amounts, the portfolio planning horizon is the time window between the portfolio plan start and finish dates. For investment amounts, the report has the option to display planned or budgeted amounts depending upon the financial plan type parameter selected. The investment amounts shown in the report represent amounts from investments that are above the waterline in the portfolio. Investments are considered above the waterline if they are ranked, via ranking rules or manual ranking, above the waterline. The waterline placement is determined by the primary constraint or it may be manually set. While the primary constraint determines where the waterline appears in the list, the ranking determines which investments appear above or below the waterline. You may rank investments by manually dragging and dropping investments above and below the waterline, editing the rank number, or defining and running ranking rules.

This report contains the following calculations:

Change

The change amount field is the variance between the portfolio plan and portfolio amounts to determine if the plan amount is an increase or decrease to the portfolio amount.

Formula:
Portfolio Plan – Portfolio

%

The change % is the variance between the portfolio plan and portfolio amounts, displayed as a percentage of the portfolio amount.

Formula:
((Portfolio Plan – Portfolio) / Portfolio) * 100

Distributed Target Total Section

Role: Total

This is the sum of the individual roles included in the portfolio targets.

Role: Variance

This is the difference between the role overall total and role total amounts.

Formula:
Role: Overall Total – Role: Total

Above Waterline Investment Totals Section

Role: Other Roles

This is the sum of the allocation amounts for any roles on investments in the portfolio that are not individually added to the portfolio targets.

Role: Total

This is the sum of the individual roles included in the portfolio targets and the other roles line item described above.

Above Waterline Investment Metrics Section

Planned Cost per Role

This is the planned cost amount divided by the role total amount.

Formula:
Planned Cost / Role: Total

Planned Benefit per Role

This is the planned benefit amount divided by the role total amount.

Formula:
Planned Benefit / Role: Total

Planned Profit per Role

This is the planned benefit amount minus the planned cost amount, divided by the role total amount.

Formula:
(Planned Benefit - Planned Cost) / Role: Total

Report Security and Technical Details:
Security is determined by portfolio view rights.

Topic	Additional Explanation
Time slices are not required for this report.	The report shows amounts based on portfolio CLOB data and does not require any time slice requests. Portfolio CLOBs store the portfolio time phased data.
Portfolio planning and analysis occurs within the portfolio planning horizon, which is the time window between the portfolio start and finish dates. For portfolio plans, the portfolio planning horizon is the time window between the portfolio plan start and finish dates.	The amounts that display in the report are amounts within the portfolio planning horizon. Any distributed target or investment amounts outside this time window are not included in the report. This aligns with the amounts displayed in portfolios, which are also subject to the planning horizon.
The investment data included in a portfolio depends on the *Synchronize portfolio investments job*. The portfolio must be synchronized for investment data to display in the report. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included.	This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, their data will display in the report. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.
Investments are considered above the waterline if they are ranked, via ranking rules or manual ranking, above the waterline. The waterline placement is determined by the primary constraint or it may be manually set. While the primary constraint determines where the waterline appears in the list, the ranking determines which investments appear above or below the waterline.	When you first access the Waterlines view, investment ranking is based on the following criteria: approval status and finish date. Approved investments are ranked higher than unapproved investments and appear at the top of the list. Next, investments are sorted by their finish dates. Investments with earlier finish dates are ranked higher than investments with later finish dates. You may re-rank investments by manually dragging and dropping investments above and below the waterline, editing the rank number, or defining and running ranking rules.

Portfolio Plan Changes

The Portfolio Plan Changes report is grouped by portfolio and displays investments that have key attributes modified in portfolio plans. These attributes include budgeted or planned cost and benefit, role demand, and schedule dates. The report provides visibility into investment level changes in portfolio plans. It compares the portfolio amounts to portfolio plan amounts, using highlighting and arrow indicators to identify changes, for up to three plans. Within each portfolio, the report may also be grouped by investment manager.

Portfolio Plan Changes

Business Technologies

Investment / Attribute	Portfolio	Goal Alignment and Required	Cost Reduction	High ROI / Low Risk
Berks, Paul				
Automated Security Enhancements				
Planned Cost	264,400.00	364,400.00 ↑	264,400.00	264,400.00
Planned Capital Cost	167,200.00	167,200.00	167,200.00	167,200.00
Planned Operating Cost	97,200.00	197,200.00 ↑	97,200.00	97,200.00
Planned Benefit	900,000.00	1,000,000.00 ↑	900,000.00	900,000.00
Planned NPV	627,488.00	627,500.00 ↑	627,488.00	627,488.00
Planned ROI %	239.52	173.50 ↓	239.52	239.52
Planned Payback(Months)	1.00	1.00	1.00	1.00
Planned Breakeven	5/31/2013	5/31/2013	5/31/2013	5/31/2013
Role: Architect	184.00	184.00	184.00	184.00
Role: Business Analyst	312.00	312.00	312.00	312.00
Role: Developer	304.00	304.00	304.00	304.00
Role: Project Manager	312.00	312.00	312.00	312.00
Role: Test Engineer	152.00	152.00	152.00	152.00
Role: Other Roles	440.00	440.00	440.00	440.00
Role: Total	1,704.00	1,704.00	1,704.00	1,704.00
Start Date	5/1/2013	5/1/2013	5/1/2013	5/1/2013
Finish Date	8/16/2013	8/16/2013	8/16/2013	8/16/2013
Approved				
Required				
Order Trending Analysis				
Planned Cost	264,400.00	152,240.00 ↓	264,400.00	264,400.00
Planned Capital Cost	167,200.00	69,440.00 ↓	167,200.00	167,200.00
Planned Operating Cost	97,200.00	82,800.00 ↓	97,200.00	97,200.00
Planned Benefit	800,000.00	200,000.00 ↓	800,000.00	800,000.00
Planned NPV	524,427.00	524,300.00 ↓	524,427.00	524,427.00
Planned ROI %	200.18	200.10 ↓	200.18	200.18
Planned Payback(Months)	2.00	2.00	2.00	2.00
Planned Breakeven	5/31/2013	5/31/2013	5/31/2013	5/31/2013
Role: Architect	160.00	160.00	160.00	160.00
Role: Business Analyst	280.00	160.00 ↓	280.00	280.00
Role: Developer	336.00	200.00 ↓	336.00	336.00
Role: Project Manager	280.00	160.00 ↓	280.00	280.00
Role: Test Engineer	152.00	0.00 ↓	152.00	152.00
Role: Other Roles	392.00	240.00 ↓	392.00	392.00
Role: Total	1,600.00	920.00 ↓	1,600.00	1,600.00

Important! This report runs numerous queries to retrieve the data necessary to populate the report. You should avoid running this report without parameters and should try to limit the results to reasonable amounts of data. If you do not do this, then you may experience performance issues.

Report Prerequisites:

- There must be at least one portfolio created (*Home/Portfolio Management -Portfolios*) when running the report or the report will display a message that there are no results that match your criteria.
- There must be at least one portfolio plan created. There must also be at least one investment that has one of the key report attributes modified in the plan. The report displays only investments that have been changed in a plan; it does not list all investments in the portfolio.
- The report has a parameter that allows you to compare the portfolio to the portfolio plan of record. The portfolio must have at least one portfolio plan marked as plan of record in order for the Compare Portfolio to Plan of Record parameter to work.

- The portfolio contents must be defined and the portfolio must be synchronized for the report to display investment data. The portfolio investment data is synchronized by running the *Synchronize portfolio investments* job. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included.

  This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, their data will display in the report. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.
- The actual investments must have data in order for the portfolio sync to copy the data from the actual investments to the portfolio investments. They must have planned cost or budgeted cost and benefit amounts entered in the financial summary properties to sync these amounts to the portfolio and display in the report. If the investments have detailed cost plans or budget plans, and benefit plans, created under the financial plans tab, then the planned or budgeted cost and benefit amounts on the financial summary properties will be read only and set according to the amounts in the detailed financial plans. In this case, the cost plan amount for the plan of record or approved budget amount, with associated benefits, will display on the financial summary properties and in the report. Note: These investment cost and benefit amounts may be manually entered or modified for plans in a portfolio.
- The investments must have at least one resource or role on the investment team in order for the team member allocation demand amounts to sync to the portfolio and display in the report. Note: These investment role allocation demand amounts may be manually entered or modified for plans in a portfolio.
- This report is also accessible from the *Compare* button on the plans tab in a portfolio (*Home/Portfolio Management -Portfolios*). The *Compare* button displays reports that meet the following conditions: (1) The report definition is associated to the 'Portfolio Plans Compare' category on the associated categories tab of the report definition (*Administration/Data Administration-Reports and Jobs*) and (2) The report definition has a portfolio plan browse parameter with the bind parameter code of 'param_plan'.

  There must be at least one portfolio plan created in order to run the report from the *Compare* button because it requires that you select which plans to include in the report. The report supports comparing up to three plans. You may select any number of plans, up to three plans. If you select more than three plans, the report will display the plan that is marked as the plan of record and the two most recently created plans that are not the plan of record. If there is no plan of record, the report displays the three most recently created plans.

Report Definition:

Name:	Portfolio Plan Changes
ID:	CSP_PFM_PortPlanChanges
Description:	Portfolio Plan Changes (CSP)
Executable Name:	/CSP/Portfolio Plan Changes

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Portfolio OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Portfolio Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Portfolio Stakeholder param_stakeholder	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Portfolio param_portfolio	Browse Multiple-select	Active Portfolio browse PFM_BROWSE_ACTIVE_PORTFOLIOS	No
Compare Portfolio to Plan of Record? param_plan_of_rec	Checkbox		No Unchecked
Show Above Waterline Only? param_waterline	Checkbox		No Checked
Portfolio Plan param_plan	Browse Multiple-select	Report (Portfolio Plans) CSP_RPT_PFM_PLAN	No
Financial Plan Type param_plan_type	Pull-down Single-select	Report (Budget, Planned) CSP_RPT_FIN_PLAN_TYPE	No Planned
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Include Inactive Portfolios? param_p_active	Checkbox		No Unchecked
Group By param_group	Pull-down Single-select	Report (Investment Manager) CSP_RPT_INV_MGR_GROUP	No Investment Manager
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Financial Plan Type: Budget, Planned
Group By: No Grouping, Investment Manager

Parameter Explanations:

- The Portfolio OBS parameter allows you to control which portfolios display in the report. When you select an OBS unit in this parameter, the report will display the portfolios attached to the OBS unit you select and the portfolios attached to any OBS units that are descendent units of the OBS unit you select.

- The Compare Portfolio to Plan of Record parameter compares each portfolio to the portfolio plan marked as the Plan of Record, if there is one. This allows you to run the report comparing portfolio amounts to plan of record amounts, without having to browse and select specific plans for the comparison.
- The Show Above Waterline Only parameter allows you to control which investments display in the report. If the parameter is checked, the report includes only investments that are above the waterline in the portfolio. If the parameter is not checked, then it includes all investments above and below the waterline.
- The Portfolio Plan parameter allows you to select specific portfolio plans to display in the report. The report supports comparing up to three plans for each portfolio. If you select more than three plans for one portfolio, the report displays the plan that is marked as the plan of record and the two most recently created plans. If there is no plan of record, the report displays the three most recently created plans of the plans you selected. The parameter uses the same logic if you do not select any plans in the parameter; it displays plan of record first and then the most recent plans.
- The Financial Plan Type parameter allows you to select which type of financial cost and benefit to include in the report: budgeted or planned. This option is available because sometimes cost plans are implemented without budgets so this parameter gives you the flexibility to select which plan type to show in the report. The Financial Plan Type parameter works as follows:

  Budget — The budgeted cost and benefit amounts in the report are from the investment financial summary properties. These fields are populated from the approved budget plan, if there is a detailed budget plan on the investment, and its associated benefit plan.

  Planned — The planned cost and benefit amounts in the report are from the investment financial summary properties. These fields are populated from the cost plan that is the plan of record, if there is a detailed cost plan on the investment, and its associated benefit plan.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

  No Grouping — This option does not group the report so you should select this value if you do not want to do a grouping.

  Investment Manager — This option groups the report by investment manager.

Report Fields and Calculations:

The report is grouped by portfolio and investment within each portfolio. It displays the following columns: investment or attribute name, portfolio value, and portfolio plan values. The report displays only portfolios with investments that have been changed in a plan. It lists only investments with report attributes modified in at least one plan; it does not list all investments in the portfolio. The report also offers an option to group the investments by the investment manager. The report supports comparing up to three plans. You may select any number of plans, up to three plans. If you select more than three plans, the report will display the plan that is marked as the plan of record and the two most recently created plans that are not the plan of record. If there is no plan of record, the report displays the three most recently created plans. From left to right in the report, the plans are displayed in this order: plan of record (if it exists) and then any other plans sorted in descending order of most recent to oldest.

The investment key attributes included in the report are the following: planned cost, planned capital cost, planned operating cost, planned benefit, planned NPV, planned ROI %, planned payback (months), planned breakeven, listing of each individual role included in the portfolio targets, 'Other Roles' line item for additional investment roles not included in the targets, role total, start date, finish date, approved, and required. The report displays a checkmark for the investments in the portfolio that are approved or required.

The amounts that display in the report are amounts that fall within the portfolio planning horizon, which is the time window between the portfolio start and finish dates. For portfolio plan amounts, the portfolio planning horizon is the time window between the portfolio plan start and finish dates. The report also has the option to display planned or budgeted amounts depending upon the financial plan type parameter selected.

The investment attribute changes in portfolio plans are highlighted and the direction of change is represented with arrow indicators. The attribute value has a gray background if the value in the portfolio plan is different from the portfolio and no background if they are the same. The change arrows compare the portfolio attribute value to the portfolio plan attribute value. An upward pointing arrow indicates the value has increased in the plan; a downward pointing arrow indicates the value has decreased in the plan.

Report Security and Technical Details:
Security is determined by portfolio view rights.

Topic	Additional Explanation
Time slices are not required for this report.	The report shows amounts based on portfolio CLOB data and does not require any time slice requests. Portfolio CLOBs store the portfolio time phased data.
Portfolio planning and analysis occurs within the portfolio planning horizon, which is the time window between the portfolio start and finish dates. For portfolio plans, the portfolio planning horizon is the time window between the portfolio plan start and finish dates.	The amounts that display in the report are amounts within the portfolio planning horizon. Any investment amounts outside this time window are not included in the report. This aligns with the amounts displayed in portfolios, which are also subject to the planning horizon.
The investment data included in a portfolio depends on the *Synchronize portfolio investments job*. The portfolio must be synchronized for investment data to display in the report. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included.	This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, their data will display in the report. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.
Investments are considered above the waterline if they are ranked, via ranking rules or manual ranking, above the waterline. The waterline placement is determined by the primary constraint or it may be manually set. While the primary constraint determines where the waterline appears in the list, the ranking determines which investments appear above or below the waterline.	When you first access the Waterlines view, investment ranking is based on the following criteria: approval status and finish date. Approved investments are ranked higher than unapproved investments and appear at the top of the list. Next, investments are sorted by their finish dates. Investments with earlier finish dates are ranked higher than investments with later finish dates. You may re-rank investments by manually dragging and dropping investments above and below the waterline, editing the rank number, or defining and running ranking rules.

Portfolio Plan Changes - Waterline and Rank

The Portfolio Plan Changes - Waterline and Rank report is grouped by portfolio and displays the above waterline indicator and rank number for investments in each portfolio. The report provides visibility into investment level waterline and rank changes in portfolio plans. It compares the waterline and rank information between the portfolio and portfolio plans, using highlighting to identify changes, for up to three plans.

Portfolio Plan Changes - Waterline and Rank

Business Technologies

	Portfolio		Goal Alignment and Required		Cost Reduction		High ROI / Low Risk	
Investment / Attribute	Above Waterline	Rank	Above Waterline	Rank	Above Waterline	Rank	Above Waterline	Rank
CRM Contact Center Development	✓	1.00	✓	5.00	✓	1.00	✓	8.00
CRM Enhancements	✓	2.00	✓	6.00	✓	2.00		10.00
Order Management Release 2	✓	3.00		12.00	✓	3.00		14.00
Online Order Performance Improvements	✓	4.00		11.00	✓	4.00	✓	4.00
Client Services Datamart	✓	5.00		13.00	✓	5.00		11.00
Financial Process Audit	✓	6.00		15.00	✓	6.00		12.00
eCommerce Portal	✓	7.00	✓	2.00		7.00	✓	7.00
Credit Card Processing Enhancement		9.00		14.00		9.00	✓	5.00
Online Order Catalog		10.00	✓	7.00		10.00		13.00
Order Trending Analysis		12.00		9.00		12.00	✓	2.00
4G Upgrade Readiness		13.00		16.00		13.00	✓	6.00
Automated Security Enhancements		14.00	✓	3.00		14.00	✓	1.00
Credit Card Security Improvements		15.00	✓	4.00		15.00		15.00
Learning Portal Optimization		16.00	✓	1.00		16.00	✓	3.00

Report Prerequisites:

- There must be at least one portfolio created (*Home/Portfolio Management -Portfolios*) when running the report or the report will display a message that there are no results that match your criteria.
- There must be at least one portfolio plan created in order to compare a plan against the actual portfolio otherwise the report will display portfolio amounts only.
- The report has a parameter that allows you to compare the portfolio to the portfolio plan of record. The portfolio must have at least one portfolio plan marked as plan of record in order for the Compare Portfolio to Plan of Record parameter to work.
- The portfolio contents must be defined and the portfolio must be synchronized for the report to display investment data. The portfolio investment data is synchronized by running the *Synchronize portfolio investments* job. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included.

  This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, their data will display in the report. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.
- This report is also accessible from the *Compare* button on the plans tab in a portfolio (*Home/Portfolio Management -Portfolios*). The *Compare* button displays reports that meet the following conditions: (1) The report definition is associated to the 'Portfolio Plans Compare' category on the associated categories tab of the report definition (*Administration/Data Administration-Reports and Jobs*) and

(2) The report definition has a portfolio plan browse parameter with the bind parameter code of 'param_plan'.

There must be at least one portfolio plan created in order to run the report from the *Compare* button because it requires that you select which plans to include in the report. The report supports comparing up to three plans. You may select any number of plans, up to three plans. If you select more than three plans, the report will display the plan that is marked as the plan of record and the two most recently created plans that are not the plan of record. If there is no plan of record, the report displays the three most recently created plans.

Report Definition:

Name:	Portfolio Plan Changes - Waterline and Rank
ID:	CSP_PFM_PortPlanChgWaterline
Description:	Portfolio Plan Changes - Waterline and Rank (CSP)
Executable Name:	/CSP/Portfolio Plan Changes - Waterline and Rank

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Portfolio OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Portfolio Manager param_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Portfolio Stakeholder param_stakeholder	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No
Portfolio param_portfolio	Browse Multiple-select	Active Portfolio browse PFM_BROWSE_ACTIVE_PORTFOLIOS	No
Compare Portfolio to Plan of Record? param_plan_of_rec	Checkbox		No Unchecked
Show Above Waterline Only? param_waterline	Checkbox		No Checked
Portfolio Plan param_plan	Browse Multiple-select	Report (Portfolio Plans) CSP_RPT_PFM_PLAN	No
Include Inactive Portfolios? param_p_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
There are no parameter lookup values for this report.

Parameter Explanations:

- The Portfolio OBS parameter allows you to control which portfolios display in the report. When you select an OBS unit in this parameter, the report will display the portfolios attached to the OBS unit you select and the portfolios attached to any OBS units that are descendent units of the OBS unit you select.
- The Compare Portfolio to Plan of Record parameter compares each portfolio to the portfolio plan marked as the Plan of Record, if there is one. This allows you to run the report comparing the portfolio to the plan of record, without having to browse and select specific plans for the comparison.
- The Show Above Waterline Only parameter allows you to control which investments display in the report. If the parameter is checked, the report includes only investments that are above the waterline in the portfolio. If the parameter is not checked, then it includes all investments above and below the waterline.
- The Portfolio Plan parameter allows you to select specific portfolio plans to display in the report. The report supports comparing up to three plans for each portfolio. If you select more than three plans for one portfolio, the report displays the plan that is marked as the plan of record and the two most recently created plans. If there is no plan of record, the report displays the three most recently created plans of the plans you selected. The parameter uses the same logic if you do not select any plans in the parameter; it displays plan of record first and then the most recent plans.

Report Fields and Calculations:

The report is grouped by portfolio and displays the following columns: investment name, above waterline and rank for the portfolio, and above waterline and rank for portfolio plans. The report displays a checkmark for the investments in the portfolio that are above the waterline. The report includes all investments in the portfolio that have a rank. If an investment is not ranked (NR in the waterlines tab in the portfolio), then it does not display in the report. The report supports comparing up to three plans. You may select any number of plans, up to three plans. If you select more than three plans, the report will display the plan that is marked as the plan of record and the two most recently created plans that are not the plan of record. If there is no plan of record, the report displays the three most recently created plans. From left to right in the report, the plans are displayed in this order: plan of record (if it exists) and then any other plans sorted in descending order of most recent to oldest.

The investment waterline and rank changes in portfolio plans are highlighted with a gray background. The above waterline and rank columns have a gray background if the portfolio plan is different from the portfolio. If the plan is the same as the portfolio, there is no background color.

Investments are considered above the waterline if they are ranked, via ranking rules or manual ranking, above the waterline. The waterline placement is determined by the primary constraint or it may be manually set. While the primary constraint determines where the waterline appears in the list, the ranking determines which investments appear above or below the waterline. You may rank investments by manually dragging and dropping investments above and below the waterline, editing the rank number, or defining and running ranking rules.

Report Security and Technical Details:

Security is determined by portfolio view rights.

Topic	Additional Explanation
The investment data included in a portfolio depends on the *Synchronize portfolio investments job*. The portfolio must be synchronized for investment data to display in the report. This job provides a snapshot of the investment data included in a portfolio and portfolio plans. It copies data from the actual investment tables to the portfolio investment tables. The information that is copied depends on the attributes registered on the Portfolio Investment object Attribute Registry tab (*Administration/Studio-Objects*). By default, the required portfolio investment attributes are included.	This job can be run manually or scheduled from a portfolio and Reports and Jobs (*Home/Personal-Reports and Jobs*). Only one portfolio can be selected at a time when running the job. You may run this job to sync the portfolio investments by clicking on the Sync Schedule 'Manual' link on the portfolio properties. This link opens the portfolio sync properties page, which has the option to schedule the sync (weekly or monthly recurrence) or manually sync. If manual recurrence is selected and you click the 'Sync Now' button, the portfolio will immediately sync. The same 'Sync Now' button is also available on the Contents Editor and Targets tabs of the portfolio. Once the portfolio investments are synchronized, their data will display in the report. The portfolio investment data reflects the snapshot of investment data as of the Last Sync Date. The Last Sync Date displays under the Sync Schedule field on the portfolio properties.
Investments are considered above the waterline if they are ranked, via ranking rules or manual ranking, above the waterline. The waterline placement is determined by the primary constraint or it may be manually set. While the primary constraint determines where the waterline appears in the list, the ranking determines which investments appear above or below the waterline.	When you first access the Waterlines view, investment ranking is based on the following criteria: approval status and finish date. Approved investments are ranked higher than unapproved investments and appear at the top of the list. Next, investments are sorted by their finish dates. Investments with earlier finish dates are ranked higher than investments with later finish dates. You may re-rank investments by manually dragging and dropping investments above and below the waterline, editing the rank number, or defining and running ranking rules.

Chapter 8: Vendor Management

This section contains the following topics:

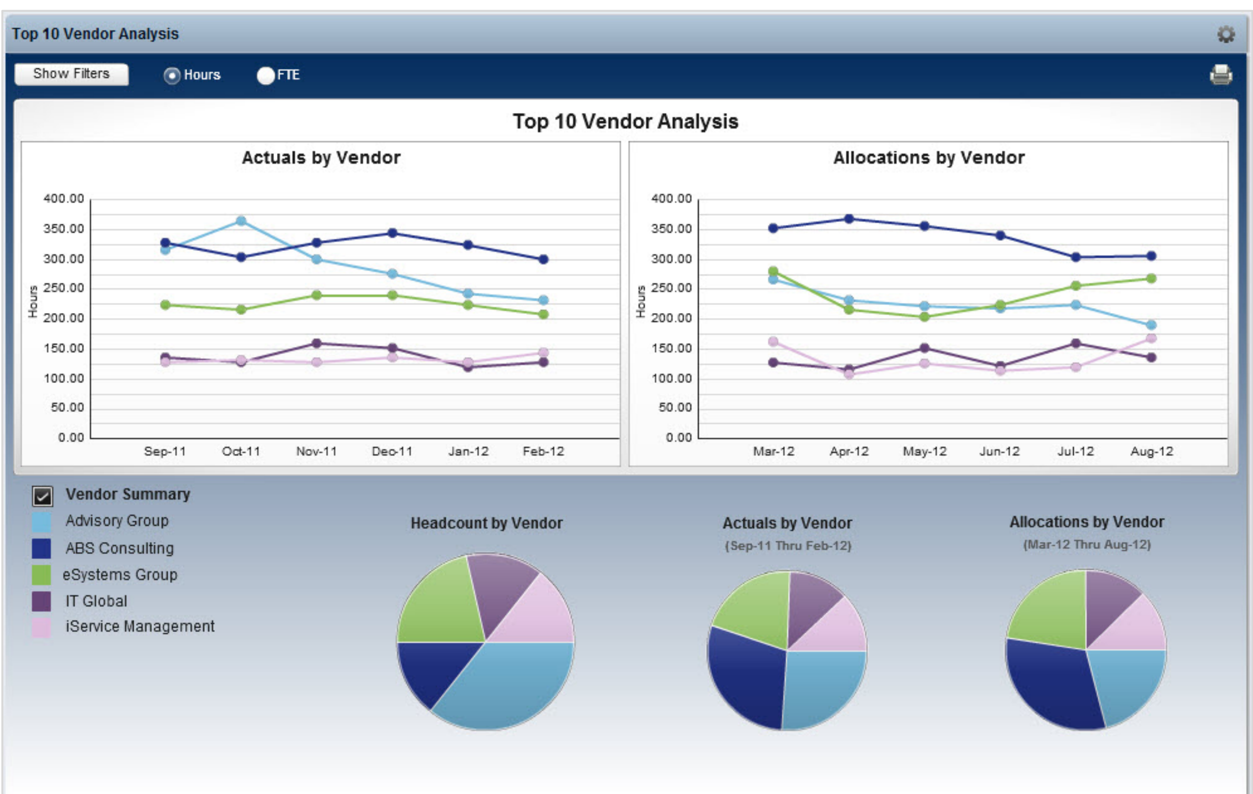
Xcelsius Dashboard

The vendor management dashboard provides visibility into vendor headcount, actuals and allocation amounts across the resource pool of your organization.

The dashboard includes:

Top 10 Vendor Analysis

The Top 10 Vendor Analysis dashboard displays the ten vendors with the highest resource allocation amounts on projects. The dashboard presents a side-by-side graphical view of vendor actuals for the past six months and vendor allocations for the next six months. The dashboard also provides visibility into vendor headcount, actuals, and allocations displayed as pie charts. The amounts in this dashboard may be displayed as hours or FTEs.



The Vendor Summary view can be switched to a more detailed view by unchecking the Vendor Summary option and checking the names of individual vendors. For example, the below dashboard is displaying the three vendors selected by checking the boxes beside their names: Advisory Group, ABS Consulting, and eSystems Group.

Dashboard Prerequisites:

- The charts in the dashboard are grouped by vendor so you must have vendor resources created in Clarity. A vendor resource is defined as a resource with the external field checked and a vendor associated to it in the resource financial properties.
- Vendors must be created in Clarity (*Administration/Finance/Setup-Vendors*) before associating them to external resources.
- The resource must be assigned to at least one investment for actuals to display in the dashboard. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The resource must be on at least one investment team for allocations to display in the dashboard.
- The actual amounts are calculated based on the time slice with the name MONTHLYRESOURCEACTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this dashboard or the dashboard will not display data for those periods.
- The allocation amounts are calculated based on the time slice with the name MONTHLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this dashboard or the dashboard will not display data for those periods.
- The time periods that display in the dashboard and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar

periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Portlet Definition:

Name:	Top 10 Vendor Analysis	
ID:	csp_resTop10Vendors	
Type:	Interactive	
Dashboard File (.SWF):	Top_10_Vendor_Analysis.swf	
NSQL Query Providers:	Top 10 Vendors	csp.resTop10Vendors
	Top 10 Vendors Labels	csp.resTop10VendorsLabels
	Resource OBS Types	csp.cmnResOBSTypes
	Resource OBS Levels	csp.cmnResOBSLevels
	Resource OBS Units	csp.cmnResOBSUnits
	Project Types	csp.cmnPrjTypes

Dashboard Filters:
The data displayed in the dashboard can be filtered by the following:

Filter	Type Style	Query Name Query ID	Required Default Value
Resource OBS	Pull-down Single-select	Resource OBS Types csp.cmnResOBSTypes	Yes
OBS Level	Pull-down Single-select	Resource OBS Levels csp.cmnResOBSLevels	Yes
OBS Unit	Pull-down Single-select	Resource OBS Units csp.cmnResOBSUnits	Yes
Project Type	Pull-down Single-select	Project Types csp.cmnPrjTypes	No All
Status	Pull-down Single-select		No All
Clarity User Internal ID p_user_id	Hidden		Yes Passed via Clarity

Dashboard Filter Values:
Project Status: All, Approved, Unapproved

Dashboard Filter Explanations:
The Resource OBS filter allows you to control which resources include in the dashboard. When you select an OBS unit in this filter, the dashboard will include the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.

Dashboard Components and Calculations:

The dashboard displays two line charts showing actuals posted for the last six months on the left side, and vendor allocations planned for the next six months, starting with the current month, on the right side. The dashboard also includes three pie charts showing the headcount, actual, and allocation distribution by vendor. The amounts may be displayed as hours or FTEs. External labor is included in the dashboard; equipment, expense and material resources are excluded. The dashboard is grouped by vendor, which is an attribute on the resource financial properties.

The dashboard can be switched from a line chart of the top ten vendors to a column chart of select vendors by unchecking the Vendor Summary option. When the Vendor Summary option is unchecked, the column charts can be filtered by vendors allowing comparisons among vendors. The Detail button drills down to a detailed report described in this guide as the Vendor Actuals and Allocations by Resource report. When the Clarity Solution Pack add-in is first installed, the Vendor Actuals and Allocations by Resource report must be run once from the Reports and Jobs menu (*Home/Personal-Reports and Jobs*) before it is run by clicking on the Detail button in the dashboard. If the report is not run once from the Reports and Jobs menu, then the following error message will display when a user runs the report from the dashboard Detail button: “The database logon information for this report is either incomplete or incorrect”. Running the report once from the menu sets the database login information and this must occur for the dashboard Detail button to work. After the report runs successfully one time, for one user, the dashboard Detail button will work for all users.

Dashboard Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
External resources only are included.	srm_resources.is_external = 1	
Resources associated to vendors only are included.	pac_mnt_resources.vendor_code IS NOT NULL	
The time periods that display in the dashboard and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this dashboard.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEACTCURVE' prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEALLOCCURVE'	Time slices with the names of MONTHLYRESOURCEACTCURVE and MONTHLYRESOURCEALLOCCURVE are required for this dashboard.

Crystal Reports

The vendor management reports provide visibility into the actuals and allocations of vendor resources across the resource pool of your organization. The reports provide insight into the time entered by vendor resources across investments. They also present a view of vendor resource plan amounts across investments, compared to baseline amounts for those investments.

The reports include:

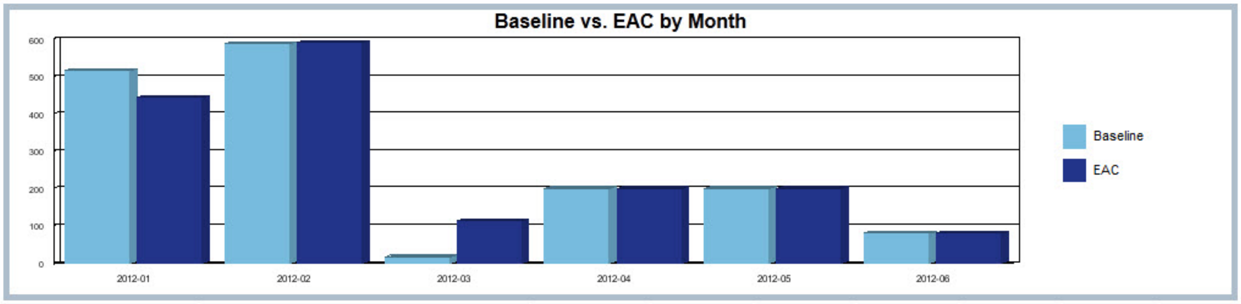
Vendor Baseline vs. Plan by Resource
Vendor Actuals and Allocations by Resource
Vendor Time Review by Resource

Vendor Baseline vs. Plan by Resource

The Vendor Baseline vs. Plan by Resource report displays baseline, actual, estimate, and variance amounts by resource across investments. The report is grouped by vendor to give you visibility into the variances for each vendor. The chart shows baseline versus estimate at completion by month. The amounts may be displayed as hours or FTEs.

Vendor Baseline vs. Plan by Resource (Hours)

Advisory Group



Resource Name	Investment Name	Investment ID	Baseline	Actual	ETC	EAC	Variance	% Variance
Goldman, Mark	Online System Enhancements	PR1038	236.00	192.00	44.00	236.00	0.00	0.00
Goldman, Mark	PCI Controls Remediation	PR1003	240.00	0.00	240.00	240.00	0.00	0.00
Goldman, Mark	eCommerce Portal	PR1002	280.00	0.00	284.00	284.00	4.00	1.43
Guptka, Rakesh	Online System Enhancements	PR1038	368.00	208.00	160.00	368.00	0.00	0.00
Guptka, Rakesh	Web Application Enhancement	PR1004	160.00	0.00	160.00	160.00	0.00	0.00
Johnson, Eric	CRM Contact Center	PR1028	112.00	40.00	96.00	136.00	24.00	21.43
Johnson, Eric	Global Expense Application	PR1025	84.00	35.00	49.00	84.00	0.00	0.00
Levert, Ed	CRM Contact Center	PR1028	120.00	0.00	120.00	120.00	0.00	0.00
Total			**1,600.00**	**475.00**	**1,153.00**	**1,628.00**	**28.00**	**1.75**
Grand Total			**3,556.00**	**1,099.00**	**2,485.00**	**3,584.00**	**28.00**	**0.79**

Report Prerequisites:

- The resource must be a vendor resource to be included in the report. A vendor resource is defined as a resource with the external field checked and a vendor associated to it in the resource financial properties.
- Vendors must be created in Clarity (*Administration/Finance/Setup-Vendors*) before associating them to external resources.
- The resource must be assigned to at least one investment during the reporting period selected to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.
- The baseline amount is calculated based on the current baseline revision and the time slice with the name MONTHLYRESOURCEBASECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The actual amount is calculated based on the time slice with the name MONTHLYRESOURCEACTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The ETC amount is calculated based on the time slice with the name MONTHLYRESOURCEESTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Vendor Baseline vs. Plan by Resource
ID:	CSP_RES_VendorBaseVsPlan
Description:	Vendor Baseline vs. Plan by Resource (CSP)
Executable Name:	/CSP/Vendor Baseline vs Plan by Resource

Report Parameters:

Parameter Label **Bind Parameter Code**	**Type** **Style**	**Lookup Name** **Lookup ID**	**Required** **Default Value**
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Vendor param_vendor	Browse Multiple-select	Browse for Vendors FIN_VENDORS	No
Resource param_resource	Browse Multiple-select	Report (External Resources) CSP_RPT_RES_EXTERNAL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Start Date param_from_date	Relative Date		Yes Start of Current Quarter
End Date param_to_date	Relative Date		Yes End of Next Quarter
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Completed Tasks Only? param_t_status	Checkbox		No Unchecked
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Show Graph? param_show_graph	Checkbox		No Checked

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Unit Type: FTE, Hours

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Vendor parameter displays the vendors created in Clarity (*Administration/Finance/Setup-Vendors*).
- The Resource parameter displays external resources, which are resources with the external field checked.
- The Start Date and End Date parameters allow you to control the months that display in the report. The start date entered determines the first month of data included in the baseline, actual, ETC, EAC, and variance values as well as the first month displayed in the chart. The end date determines the month thru which data is included in the report and it is the last month displayed in the chart.
- The Completed Tasks Only parameter allows you to control which tasks display in the report. If the parameter is checked, the report includes only tasks with a status of 'Completed'. If the parameter is not checked, then it includes all tasks regardless of status.
- The Show Graph parameter controls whether the Baseline vs. EAC by Month chart displays on the report. If the parameter is checked, the chart will display at the top of each vendor section in the report. If the parameter is not checked, the chart will not display.

Report Fields and Calculations:
The report displays the resource name, investment name, investment ID, baseline, actual, ETC, EAC, variance, and % variance across investments. When the show graph parameter is checked, the report also includes a column chart showing baseline versus estimate at completion, in hours or FTEs, by month. External labor resources are included in the report; equipment, expense and material resources are excluded. The report is grouped by vendor, which is an attribute on the resource financial properties.

The amounts are calculated for a range of periods determined by the start date and end date report parameters.

This report contains the following calculations:

EAC	The EAC field is the sum of the ETC and actual amounts. **Formula:** ETC + Actual

Variance

The variance field is the difference between EAC and baseline amounts. If no baseline exists, the baseline amounts will be set to 0 and the variance will be calculated as if the baseline amounts are 0.

Variance background color is determined as follows:

Red The EAC amount exceeds the baseline amount.

Formula:

EAC - Baseline

% Variance

The % variance field is the percentage of variance between EAC and baseline amounts. If no baseline exists, the baseline amounts will be set to 0 and the variance will be calculated as if the baseline amounts are 0.

% Variance background color is determined as follows:

Red The EAC amount exceeds the baseline amount.

Formula:

((EAC – Baseline) / Baseline) * 100

Report Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
External resources only are included.	srm_resources.is_external = 1	External resources have the external field checked.
Resources associated to vendors only are included.	pac_mnt_resources.vendor_code IS NOT NULL	Vendors must be created (*Administration/Finance/Setup-Vendors*) and then associated to the resource in resource financial properties.
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEBASECURVE') prj_blb_slicerequests.request_name IN ('MONTHLYRESOURCEACTCURVE', 'MONTHLYRESOURCEESTCURVE')	Time slices with the names of MONTHLYRESOURCEBASECURVE, MONTHLYRESOURCEACTCURVE, and MONTHLYRESOURCEESTCURVE are required for this report.

Vendor Actuals and Allocations by Resource

The Vendor Actuals and Allocations by Resource report displays resource actuals and allocations across projects, grouped by vendor. This report displays actuals for the past six months and allocations for the next six months, starting with the current month. It has amounts by month and in total. The amounts may be displayed as hours or FTEs.

Vendor Actuals and Allocations by Resource (Hours)

Resource Name	Project Name	Sep-11	Oct-11	Nov-11	Dec-11	Jan-12	Feb-12	Mar-12	Apr-12	May-12	Jun-12	Jul-12	Aug-12
ABS Consulting													
		Actuals						Allocations					
Newburg, Mary	Online System Enhancements	176.00	156.00	176.00	176.00	168.00	136.00	0.00	144.00	102.00	114.00	120.00	136.00
Smith, Kevin	Online Orders	0.00	0.00	0.00	0.00	0.00	0.00	160.00	48.00	184.00	168.00	176.00	184.00
Smith, Kevin	Online System Enhancements	152.00	148.00	152.00	168.00	156.00	164.00	0.00	144.00	102.00	114.00	120.00	170.00
Total		**328.00**	**304.00**	**328.00**	**344.00**	**324.00**	**300.00**	**160.00**	**336.00**	**388.00**	**396.00**	**416.00**	**490.00**
Advisory Group													
		Actuals						Allocations					
Goldman, Mark	eCommerce Portal	0.00	60.00	20.00	60.00	0.00	0.00	116.00	0.00	0.00	0.00	0.00	54.00
Goldman, Mark	Online System Enhancements	160.00	0.00	0.00	0.00	96.00	96.00	0.00	72.00	0.00	0.00	160.00	136.00
Guptka, Rakesh	Online System Enhancements	156.00	0.00	80.00	40.00	72.00	136.00	0.00	0.00	102.00	114.00	0.00	0.00
Johnson, Eric	CRM Contact Center	0.00	152.00	104.00	128.00	40.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Johnson, Eric	Global Expense Application	0.00	0.00	0.00	0.00	35.00	0.00	176.00	168.00	184.00	168.00	176.00	184.00
Levert, Ed	CRM Contact Center	0.00	152.00	96.00	48.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total		**316.00**	**364.00**	**300.00**	**276.00**	**243.00**	**232.00**	**292.00**	**240.00**	**286.00**	**282.00**	**336.00**	**374.00**
eSystems Group													
		Actuals						Allocations					
Krishna, Sai	Online System Enhancements	96.00	64.00	40.00	24.00	40.00	64.00	0.00	72.00	102.00	152.00	0.00	102.00
Sampson, Mike	Online System Enhancements	72.00	96.00	24.00	48.00	40.00	96.00	0.00	72.00	0.00	0.00	80.00	102.00
Total		**168.00**	**160.00**	**64.00**	**72.00**	**80.00**	**160.00**	**0.00**	**144.00**	**102.00**	**152.00**	**80.00**	**204.00**
Grand Total		**812.00**	**828.00**	**692.00**	**692.00**	**647.00**	**692.00**	**452.00**	**720.00**	**776.00**	**830.00**	**832.00**	**1,068.00**

Report Prerequisites:

- The resource must be a vendor resource to be included in the report. A vendor resource is defined as a resource with the external field checked and a vendor associated to it in the resource financial properties.
- Vendors must be created in Clarity (*Administration/Finance/Setup-Vendors*) before associating them to external resources.
- The resource must be assigned to at least one project during the reporting period selected to display in the report. The resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. Note: Effort task is a task with the Task ID of '~rmw'.
- The actual amounts are calculated based on the time slice with the name MONTHLYRESOURCEACTCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.
- The allocation amounts are calculated based on the time slice with the name MONTHLYRESOURCEALLOCCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not display data for those periods.

- The time periods that display in the report and all of the amounts being converted to FTE depend on the report calendar table. This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates calendar periods and calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the periods displayed in this report or the report will not calculate FTE data for those periods.

Report Definition:

Name:	Vendor Actuals and Allocations by Resource
ID:	CSP_RES_VendorActAndAllocs
Description:	Vendor Actuals and Allocations by Resource (CSP)
Executable Name:	/CSP/Vendor Actuals and Allocations by Resource

Report Parameters:

Parameter Label **Bind Parameter Code**	**Type** **Style**	**Lookup Name** **Lookup ID**	**Required** **Default Value**
Resource OBS param_obs_unit	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Vendor param_vendor	Browse Multiple-select	Browse for Vendors FIN_VENDORS	No
Resource param_resource	Browse Multiple-select	Report (External Resources) CSP_RPT_RES_EXTERNAL	No
Project Type param_p_type	Pull-down Single-select	Idea and Project Type OBJ_IDEA_PROJECT_TYPE	No
Project Status param_status	Pull-down Single-select	Report (Investment Statuses) CSP_RPT_INV_STATUS	Yes All
Unit Type param_unit_type	Pull-down Single-select	Report (FTE, Hours) CSP_RPT_RES_UNIT_TYPE	Yes Hours
Include Inactive Projects? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Project Type: Major Project, Application Change, Infrastructure Deployment
Project Status: All, Approved, Unapproved
Unit Type: FTE, Hours

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Vendor parameter displays the vendors created in Clarity (*Administration/Finance/Setup-Vendors*).
- The Resource parameter displays external resources, which are resources with the external field checked.
- The Project Type parameter is associated to the Idea and Project Type lookup in Clarity. This lookup is configurable so lookup values may be added, modified, or deactivated.

Report Fields and Calculations:
The report displays the resource name, project name, posted actual amounts for the past six months, and planned allocation amounts for the next six months, starting with the current month. External labor resources are included in the report; equipment, expense and material resources are excluded. The report is grouped by vendor, which is an attribute on the resource financial properties.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Programs are excluded.	inv_projects.is_program = 0	
Templates are excluded.	inv_projects.is_template = 0	
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
External resources only are included.	srm_resources.is_external = 1	External resources have the external field checked.
Resources associated to vendors only are included.	pac_mnt_resources.vendor_code IS NOT NULL	Vendors must be created (*Administration/Finance/Setup-Vendors*) and then associated to the resource in resource financial properties.
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
The time periods that display in the report and the FTE calculations are based on the report calendar table.	rpt_calendar.start_date = prj_blb_slices.slice_date AND rpt_calendar.period_type = 'MONTHLY'	This table is populated by running the *Update Business Objects Report Tables* job with the update reporting calendar option checked. This job populates the periods in the calendar table. It also calculates FTE amounts based on the availability of the resource with Resource ID of 'admin' and the time slice with the name MONTHLYRESOURCEAVAILCURVE.

Topic	Database Statement	Additional Explanation
Time slices are required for this report.	prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEACTCURVE' prj_blb_slicerequests.request_name = 'MONTHLYRESOURCEALLOCCURVE'	Time slices with the names of MONTHLYRESOURCEACTCURVE and MONTHLYRESOURCEALLOCCURVE are required for this report.

Vendor Time Review by Resource

The Vendor Time Review by Resource report displays timesheet entries for each resource, grouped by vendor. This report displays the hours entered on the timesheet by day and in total for each investment and time entry, as well as for each resource.

Vendor Time Review by Resource

ABS Consulting

Period Ending	Status	Type	Investment	Description	Task Status	Input Type	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Newburg, Mary														
12/11/2011	Posted	Task	Online System Enhancements	Functional/Technical Design	Started	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
12/18/2011	Posted	Task	Online System Enhancements	Functional/Technical Design	Started	Regular	8.00	8.00	0.00	0.00	0.00	0.00	0.00	16.00
12/18/2011	Posted	Other	Global Expense Application		Started	Regular	0.00	0.00	8.00	8.00	6.00	0.00	0.00	22.00
12/18/2011	Posted	Incident	Employee Benefits Application	Processing Error		Regular	0.00	0.00	0.00	0.00	2.00	0.00	0.00	2.00
Total							**16.00**	**16.00**	**16.00**	**16.00**	**16.00**	**0.00**	**0.00**	**80.00**
Smith, Kevin														
12/11/2011	Posted	Task	Online System Enhancements	Functional/Technical Design	Started	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
12/18/2011	Posted	Task	Online System Enhancements	Functional/Technical Design	Started	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
Total							**16.00**	**16.00**	**16.00**	**16.00**	**16.00**	**0.00**	**0.00**	**80.00**
ABS Consulting Total							**32.00**	**32.00**	**32.00**	**32.00**	**32.00**	**0.00**	**0.00**	**160.00**

Advisory Group

Period Ending	Status	Type	Investment	Description	Task Status	Input Type	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Goldman, Mark														
12/11/2011	Posted	Task	eCommerce Portal	User Interface Development	Completed	Regular	8.00	8.00	8.00	8.00	8.00	0.00	0.00	40.00
12/18/2011	Posted	Task	eCommerce Portal	User Interface Development	Completed	Regular	4.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00
Total							**12.00**	**8.00**	**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**44.00**
Levert, Ed														
12/11/2011	Posted	Task	CRM Contact Center	Unit and Performance Testing	Completed	Regular	8.00	8.00	8.00	8.00	0.00	0.00	0.00	32.00
Total							**8.00**	**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**0.00**	**32.00**
Advisory Group Total							**20.00**	**16.00**	**16.00**	**16.00**	**8.00**	**0.00**	**0.00**	**76.00**

eSystems Group

Period Ending	Status	Type	Investment	Description	Task Status	Input Type	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Krishna, Sai														
12/18/2011	Posted	Task	Online System Enhancements	Functional/Technical Design	Started	Regular	8.00	8.00	8.00	0.00	0.00	0.00	0.00	24.00
Total							**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**0.00**	**0.00**	**24.00**
eSystems Group Total							**8.00**	**8.00**	**8.00**	**0.00**	**0.00**	**0.00**	**0.00**	**24.00**
Grand Total							**60.00**	**56.00**	**56.00**	**48.00**	**40.00**	**0.00**	**0.00**	**260.00**

Report Prerequisites:

- There must be at least one timesheet for the time period and timesheet status selected when running the report or the report will display a message that there are no results that match your criteria.
- There must be time reporting periods, with a scale of weekly, created (*Administration/Project Management-Time Reporting Periods*). The time reporting period must have a status of open in order to enter time in the period. The report supports time reporting periods set up with a scale of weekly and the weekly periods may start on any day of the week and they will be reflected correctly in the report column headings. The report does not support time reporting periods set up with any of the other following scales: annual, monthly, quarterly, semiannual, daily, and biweekly. These other scale types will not display correctly in the report.
- The resource must be a vendor resource to be included in the report. A vendor resource is defined as a resource with the external field checked and a vendor associated to it in the resource financial properties.
- Vendors must be created in Clarity (*Administration/Finance/Setup-Vendors*) before associating them to external resources.

- The resource entering time must have the open for time entry field checked and the track mode set to 'Clarity' or 'Other' in order to enter time. The resource date of hire must be blank, prior to the time period, or within the time period for the resource to enter time for the period. The resource date of termination must be blank, after the time period, or within the time period for the resource to enter time for the period.
- The investment must have the open for time entry field checked and the track mode set to 'Clarity' in order to enter time against the investment. If the investment is a project, then the open for time entry field on the task must also be checked in order to enter time against the task.
- The investment must have at least one resource assigned to a task in order for the resource to enter time against the investment and for it to display in the report. For projects, the resource must be assigned to a task in the Gantt unless the project has an effort task with resources automatically assigned. For investments other than the project, resources added to the team are automatically assigned to an effort task for the investment. Note: Effort task is a task with the Task ID of '~rmw'.

  In a timesheet, resources may also assign themselves to tasks if they are a team member on the project and the 'Prevent Unassigned Timesheet Tasks' field is unchecked on the project. This field is in the time and staff section of the settings properties on the project. They may also create unplanned tasks in a timesheet if they are a team member on the project and have the appropriate permissions (Project – Edit Project Plan).
- The timesheet hour amounts are calculated based on the time slice with the name DAILYRESOURCETIMECURVE (*Administration/Data Administration-Time Slices*). This time slice must be configured to cover the dates displayed in this report or the report will not display data for those dates.

Report Definition:

Name:	Vendor Time Review by Resource
ID:	CSP_RES_VendorTimeReview
Description:	Vendor Time Review by Resource (CSP)
Executable Name:	/CSP/Vendor Time Review by Resource

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_r_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Vendor param_vendor	Browse Multiple-select	Browse for Vendors FIN_VENDORS	No
Resource param_resource	Browse Multiple-select	Report (External Resources) CSP_RPT_RES_EXTERNAL	No
Investment Type param_inv_type	Pull-down Single-select	Report (Investment Types) CSP_RPT_INV_TYPE	Yes All
Investment Manager param_i_manager	Browse Multiple-select	Browse Resource BROWSE_PROJMGR	No

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Investment param_investment	Browse Multiple-select	Investment browse INV_BROWSE_INVESTMENT	No
Time Period param_from_period	Browse Multiple-select	Report (Time Periods) CSP_RPT_TME_PERIOD	Yes
Timesheet Status param_status	Pull-down Multiple-select	Timesheet Status TIMESHEET_STATUS	Yes Open, Submitted, Returned, Approved, and Posted
Include Inactive Investments? param_i_active	Checkbox		No Unchecked
Include Inactive Resources? param_r_active	Checkbox		No Unchecked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Investment Type: All, Application, Asset, Idea, Other Work, Product, Project, Service
Time Period: Current Time Period, Next Time Period, Previous Time Period, List of Time Periods
Timesheet Status: Open, Submitted, Returned, Approved, Posted, Adjusted

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Vendor parameter displays the vendors created in Clarity (*Administration/Finance/Setup-Vendors*).
- The Resource parameter displays external resources, which are resources with the external field checked.
- The Time Period parameter allows you to determine which time periods display on the report. You must select at least one time period when running the report.
- The Timesheet Status parameter works in conjunction with the time period parameter. The report will only display time periods with the timesheet status you select when running the report. One of the values in the timesheet status parameter is 'Adjusted' and this status requires some additional explanation. An adjusted timesheet is a timesheet which has been posted in Clarity but then changes are made to the timesheet and it is re-posted. As a general rule, it does not make sense to display adjusted timesheets in reports because these timesheets have been replaced with more recently posted timesheets. While the status of 'Adjusted' is available as an option to allow visibility into adjusted timesheets, it should not normally be selected when running the report.

Report Fields and Calculations:
The report displays the timesheet period ending, timesheet status, type of time entry, investment, description, task status, input type code, and the timesheet amounts by day and in total. The report includes external labor resources only and the timesheet amounts are in hours. The report is grouped by vendor, which is an attribute on the resource financial properties.

The report is formatted to display seven days in the time period; therefore, only weekly time periods are supported for this report. If your weekly time periods start on a day other than Monday, the report adjusts the column headings accordingly. For example, your weekly periods my start on Sunday and in this case the report columns will display Sunday thru Saturday instead of Monday through Sunday as displayed in the above screen capture.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
External resources only are included.	srm_resources.is_external = 1	External resources have the external field checked.
Resources associated to vendors only are included.	pac_mnt_resources.vendor_code IS NOT NULL	Vendors must be created (*Administration/Finance/Setup-Vendors*) and then associated to the resource in resource financial properties.
Labor resources are included.	srm_resources.resource_type = 0	Equipment, expense and material resources are excluded.
A time slice is required for this report.	prj_blb_slicerequests.request_name = 'DAILYRESOURCETIMECURVE'	A time slice with the name of DAILYRESOURCETIMECURVE is required for this report.

Chapter 9: User Administration

This section contains the following topic:

Crystal Reports

The user administration reports provide visibility into license distribution, user activity, and access rights. The reports display the number of users by license type and last login date. They also present a detailed listing of access rights granted to users.

The reports include:

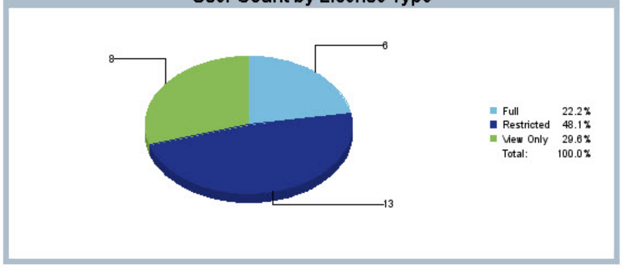
User License and Activity

The User License and Activity report displays the license type and usage frequency of each resource. It also shows general resource information. The report may be grouped by several different options including: No Grouping, Resource Manager, Primary Role, Employment Type, License Type, Usage Frequency, and OBS Level. The columns that display in the report change based on the grouping option selected. The user count by license type pie chart displays the number and percentage of users, grouped by license type. The user count by last login date pie chart displays the number and percentage of users, grouped by usage frequency.

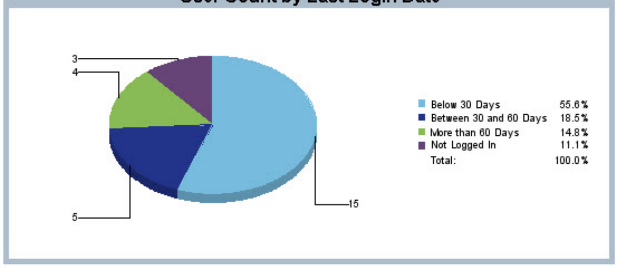
This report allows you to drill down to the User License Detail subreport, by clicking on a resource name, to see the resource's access rights that contribute to each license type.

User License and Activity

User Count by License Type



User Count by Last Login Date



Resource	Resource ID	User Name	Resource Manager	Primary Role	Employment Type	Usage Frequency	Last Login Date
Full							
Reed, Henry	henryReed	hreed	Miller, Rosie	Project Manager	Employee	Not Logged In	
Newburg, Mary	maryNewburg	mnewburg	Kumar, Arun	Storage Architect	Contractor	Between 30 and 60 Days	11/6/2013
McCarthy, John	johnMcCarthy	jmccarthy	Miller, Rosie	Project Manager	Employee	Between 30 and 60 Days	11/16/2013
Perez, Carlos	carlosPerez	cperez	Miller, Rosie	Project Manager	Employee	Below 30 Days	11/22/2013
Riviera, Alex	alexRiviera	ariviera	Miller, Rosie	Project Manager	Employee	Below 30 Days	11/26/2013
Miller, Veronica	veronicaMiller	vmiller	Miller, Rosie	Storage Architect	Employee	Below 30 Days	12/4/2013
Restricted							
Gillian, Erin	erinGillian	egillian	Miller, Rosie	Developer	Employee	Not Logged In	
Ives, Blair	blairIves	bives	Miller, Rosie	DBA	Contractor	Not Logged In	
Evans, Sean	seanEvans	sevans	Kumar, Arun	Developer	Contractor	More than 60 Days	8/24/2013
Hayes, Todd	toddHayes	thayes	Miller, Rosie	Business Analyst	Employee	More than 60 Days	9/19/2013
Levert, Ed	edLevert	elevert	Kumar, Arun	Architect	Contractor	More than 60 Days	10/11/2013
Childers, Valerie	valerieChilders	vchilders	Miller, Rosie	Architect	Employee	Between 30 and 60 Days	10/29/2013
Hill, Wayne	wayneHill	whill	Miller, Rosie	Developer	Employee	Between 30 and 60 Days	11/3/2013
Stoneburg, Sam	samStoneburg	sstoneburg	Miller, Rosie	Network Engineer	Employee	Below 30 Days	11/26/2013
Evans, Nick	nickEvans	nevans	Miller, Rosie	Business Analyst	Employee	Below 30 Days	11/29/2013
Berry, Jason	jasonBerry	jberry	Miller, Rosie	Developer	Employee	Below 30 Days	12/2/2013
Goldman, Mark	markGoldman	mgoldman	Kumar, Arun	Business Analyst	Contractor	Below 30 Days	12/3/2013
Amos, Cheryl	cherylAmos	camos	Miller, Rosie	Developer	Employee	Below 30 Days	12/5/2013
Turner, Bruce	bruceTurner	bturner	Miller, Rosie	Test Engineer	Employee	Below 30 Days	12/8/2013
View Only							
Parker, Ashley	ashleyParker	aparker	Miller, Rosie	Business Analyst	Employee	More than 60 Days	9/22/2013
Stewart, Diane	dianeStewart	dstewart	Miller, Rosie	Storage Architect	Employee	Between 30 and 60 Days	11/1/2013

User License Detail Subreport

The User License Detail subreport displays all of the access rights granted to a resource. The access rights may be granted directly to the resource, through a group, or via a resource OBS. The access rights granted include global, instance and OBS unit rights. The report also displays participant rights which are granted through the project.

User License Detail

Reed, Henry

Access Right	Access Right Type	Access Right To OBS Unit	Granted Through Type	Granted Through	Access Right Description
Full					
Project - Edit	OBS Unit	Organizational:Business Technologies	Group	Project Manager	Allows user to edit all parts of a project except for Document Management, Calendar, Action Items, Discussions and Custom Defined Fields.
Project - Manager (Auto)	Instance		Resource	Reed, Henry	The user who enables a project for management is automatically granted this right. In other words, the user becomes the Project Manager for the project. It allows user to view and edit the general and management properties of the project.
Project - Modify Baseline All	Global		Group	Project Manager	Allows a resource to baseline all project. The right also allows a resource to view the general project properties and processes.
Resource - Hard Book - All	Global		Group	Project Manager	Allows user to Soft or Hard book all resources to an investment that the user has been granted view management rights.
Status Report - Create	Global		Group	Project Manager	Allows resource to create Status Report objects. This includes the page navigation right.
Status Report - Edit All	Global		Group	Project Manager	Allows resource to edit all Status Report objects. This includes the page navigation right.
Restricted					
Project - Participant (Auto)	Instance		Project	Participant - Resource	A user assigned to a project as a project participant will automatically be assigned this right. The right allows the user access to Action Items, Project Calendar, Document Manager and Discussions.
Project - Risk, Issue, Change Request - Delete - All	Global		Group	Project Manager	Allows user to delete all risks, issues, and change requests on projects for which they have access to.
Project - Risk, Issue, Change Request - Edit - All	Global		Group	Project Manager	Allows user to create and edit all risks, issues, and change requests for a project instance.
Report - Run	Instance		Group	Project Manager	Allows user to run a specific report. The right also allows editing of the scheduled report properties and viewing of the output of the report. This right is dependent on Reports - Access being granted.
Resource - Enter Time	Instance		Resource	Reed, Henry	Allows user to complete and submit timesheets for a resource.
View Only					
Account Settings - Navigate	Global		Group	Project Manager	Allows Access to the Account Settings page
Organizer - Access	Global		Group	Project Manager	Allows Access to the Organizer page, and to the actions and notifications portlets
Page - View	Instance		Group	Project Manager	Allows viewing of a general page in the application, for instance pages (such as Portfolio pages) this right is not used.
Portlet - View	Instance		Group	Project Manager	Allows user to view a portlet in the application.
Project - View	OBS Unit	Organizational:Mobile Initiatives	OBS Unit	Resource Pool:Operations	Allows user to view the general, management, financial and opportunity properties, custom defined fields, roster, tasks, processes and sub-projects for the project.
Projects - Navigate	Global		Group	Project Manager	Allows resource to access the Project List pages and to the My Projects portlet.

Report Prerequisites:

- The user must have a status of 'Active' to display in the report. Users with a status of 'Inactive' or 'Lock' do not display in the report even if the active flag on the resource is checked.
- Global access rights display in the subreport if the user is granted at least one Global access right directly, through a group, or through a resource OBS unit used for access rights.
- Instance access rights display in the subreport if the user is granted at least one Instance access right directly, through a group, or through a resource OBS unit used for access rights.
- OBS Unit access rights display in the subreport if the user is granted at least one OBS Unit access right directly, through a group, or through a resource OBS unit used for access rights.

Report Definition:

Name:	User License and Activity
ID:	CSP_USR_LicenseActivity
Description:	User License and Activity (CSP)
Executable Name:	/CSP/User License and Activity

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Primary Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
License Type param_license	Pull-down Multiple-select	Report (Full, Restricted, View Only) CSP_RPT_USR_LICENSE_TYPE	Yes Full, Restricted, View Only
Usage Frequency param_frequency	Pull-down Multiple-select	Report (Usage Frequency) CSP_RPT_USR_USAGE_FREQUENCY	Yes Below 30 Days, Between 30 and 60 Days, More than 60 Days, Not Logged In
Sort By param_sort	Pull-down Single-select	Report (Last Login Date, Resource) CSP_RPT_USR_LOGIN_RES_SORT	Yes Last Login Date
Group By param_group	Pull-down Single-select	Report (Resource Manager, Primary Role, Employment Type, License Type, Usage Frequency, OBS Level) CSP_RPT_USR_MGR_OBS_TYPE_GROUP	Yes License Type
Show Graphs? param_graph	Checkbox		No Checked
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
License Type: Full, Restricted, View Only
Usage Frequency: Below 30 Days, Between 30 and 60 Days, More than 60 Days, Not Logged In
Sort By: Last Login Date, Resource
Group By: No Grouping, Resource Manager, Primary Role, Employment Type, License Type, Usage Frequency, OBS Level 1-10

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The License Type parameter allows you to select which type of license to include in the report. The following options are available:

Full	The report displays resources having the full license type based on the access rights granted via the resource, group or resource OBS unit.
Restricted	The report displays resources having the restricted license type based on the access rights granted via the resource, group or resource OBS unit.
View Only	The report displays resources having the view only license type based on the access rights granted via the resource, group or resource OBS unit.

- The Usage Frequency parameter allows you to select the users to include in the report, based on the frequency they log into Clarity. The following options are available:

Below 30 Days	The report displays resources who have used their license during the last 30 days, based on the last login date.
Between 30 and 60 Days	The report displays resources who have not used their license for more than 30 days, but have accessed the system during the last 60 days, based on the last login date.
More than 60 Days	The report displays resources who have not used their license for more than 60 days, based on the last login date.
Not Logged In	The report displays resources that have never used their license, based on the last login date.

- The report has a Sort By parameter that allows you to control how the report is sorted. The following sort options are available:

Last Login Date	This option sorts the report by the last login date, in descending order, within the report grouping. The users who have not logged into Clarity will sort to the top because they do not have a last login date.
Resource	This option sorts the report by the resource name, in ascending order, within the report grouping.

- The report has a Group By parameter that allows you to control how the report is grouped. The following group options are available:

No Grouping	This option does not group the report so you should select this value if you do not want to do a grouping for one of the group by options.
Resource Manager	This option groups the report by resource manager.
Primary Role	This option groups the report by the resource primary role.
Employment Type	This option groups the report by the employment type. The values for employment type are: Contractor and Employee.
License Type	This option groups the report by license type. The values for license type are: Full, Restricted, and View Only.
Usage Frequency	This option groups the report by usage frequency. The values for usage frequency are: Below 30 Days, Between 30 and 60 Days, More than 60 Days, Not Logged In.

OBS Level 1-10	This option requires that you select a unit in the resource OBS parameter in order to group by an OBS level. The resource OBS parameter and grouping by an OBS level work in conjunction with one another. The resource OBS parameter determines which OBS you group by when you select a group by level. You may group by any OBS level from 1 to 10, which is the maximum number of levels for an OBS supported in Clarity. OBS level 1 is the top level in the hierarchy and OBS level 10 is bottom level in the hierarchy. When you group by an OBS level, the resources attached to OBS units at the level you select and any units below the level you select are rolled up to the group by level of the report. If you group by an OBS level that is lower in the hierarchy, then the report groups the resources by this level (e.g. OBS Level 4). If resources are associated to units above level 4 (e.g., resources are attached to levels 2 and 3), then the resources associated to units higher in the hierarchy will display in the report in an Undefined grouping. The Undefined grouping indicates that there is no OBS unit defined for the resource at the level by which you are grouping. If you group by an OBS level but you do not select a unit in the resource OBS parameter, then the report will return results; however, it will not group by an OBS level because it relies on the resource OBS parameter to determine which OBS to use for grouping.

- The Show Graphs parameter controls whether the user count by license type and the user count by last login date pie charts display on the report. If the parameter is checked, the charts will display on the first page of the report.

Report Fields and Calculations:
If the report is not grouped, then the report displays the following columns: resource name, resource ID, user name, resource manager, primary role, employment type, license type, usage frequency, and last login date. If the report is grouped, then the report displays the same columns excluding the column selected as the grouping option. When the show graph parameter is checked, the report also displays two pie charts. The user count by license type pie chart displays the number and percentage of users, grouped by license type. The user count by last login date pie chart displays the number and percentage of users, grouped by usage frequency. The usage frequency categories are: below 30 days, between 30 and 60 days, more than 60 days, and not logged in.

The report displays license types based on the current Clarity license model which includes: Full, Restricted, and View Only. The license types in the report are based on a lookup that gets created when installing the Clarity Solution Pack. This lookup has three values: Full, Restricted, and View Only. All CA Clarity PPM access rights are associated with a license type value. License types determine the level of license associated with users. Access rights determine the license type assigned to each user. If users have access rights for multiple license types, these users are assigned the highest license type.

Subreport Fields and Calculations:
The subreport is for one resource and it displays all of the access rights granted to the resource. The columns include: access right name, access right type, access right to OBS unit, granted through type, granted through, and access right description. If the main report is grouped by license type, then the subreport displaying access rights will also be grouped by license type.

This subreport contains the following columns:

Access Right To OBS Unit
This column displays data if the Access Right Type is 'OBS Unit'. In this case, the column displays the OBS Type and Unit to which the user has access for the access right.

Granted Through Type
This column displays how the access right is granted. The options include:

Resource – The access right is assigned directly to the user.

Group – The access right is assigned to a group and the resource belongs to the group.

OBS Unit – The access right is assigned to a resource OBS unit and, depending on the OBS association mode; the resource is associated to the unit, an ancestor unit, or a descendent unit. The resource OBS must have the option set that it is 'Used for Access Rights' (*Administration/Organization and Access/OBS*). If this option is checked, then the OBS units display an 'Access Rights for this Unit' tab where you may assign rights to the OBS unit. Any resources belonging to the unit will receive these rights, depending upon the OBS association mode.

Granted Through
This column displays the specific resource, group, or OBS unit through which the access right is granted.

Granted Trough Type	**Granted Through**
Resource	The resource name displays.
Group	The group name displays.
OBS Unit	The OBS type and unit name display.

Report Security and Technical Details:
Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Users with a status of 'Active' are included.	cmn_sec_users.user_status_id = 200	Users with a status of 'Inactive' or 'Lock' are excluded.
The report displays license types based on the current Clarity license model which includes: Full, Restricted, and View Only. The license types in the report are based on a lookup that gets created when installing the Clarity Solution Pack. This lookup has three values: Full, Restricted, and View Only.	(CASE WHEN cmn_lic_users_v.licence_priority = 11 THEN 3 WHEN cmn_lic_users_v.licence_priority = 12 THEN 2 WHEN cmn_lic_users_v.licence_priority = 13 THEN 1 END)	The View Only (3) license type in the report corresponds to the View Only license type in Clarity (ID=11). The Restricted (2) license type in the report corresponds to the Restricted license type in Clarity (ID=12). The Full (1) license type in the report corresponds to the Full license type in Clarity (ID=13).

User Access Rights

The User Access Rights report displays all of the access rights granted to a resource. The access rights may be granted directly to the resource, through a group, or via a resource OBS. The access rights granted include global, instance and OBS unit rights. The report also displays participant rights which are granted through the project.

This report allows you to drill down to the User Access Rights Detail subreport, by clicking on an instance level right, to view the instances to which the user has access. This drill down option is only available if the report is grouped by resource and it is only available for instance level rights, which include participant rights.

User Access Rights

Access Right	Access Right To OBS Unit	Granted Through Type	Granted Through	Access Right Description
Sutherland, Joy				
Global				
Account Settings - Navigate		Group	Project Manager	Allows Access to the Account Settings page
Application - Navigate		Resource	Sutherland, Joy	Allows user to navigate to Application pages. User will need additional rights to view individual Applications.
Projects - Navigate		Group	Project Manager	Allows resource to access the Project List pages and to the My Projects portlet.
Reports - Access		Group	Project Manager	Allows user access to the reports pages. This right is dependent on either the Reports - Run - All right or the user being granted instance level rights such as Report - Run, Report - View Output or Report - Edit Properties.
Instance				
Portlet - View		Group	Project Manager	Allows user to view a portlet in the application.
Project - Manager (Auto)		Resource	Sutherland, Joy	The user who enables a project for management is automatically granted this right. In other words, the user becomes the Project Manager for the project. It allows user to view and edit the general and management properties of the project.
Project - Participant (Auto)		Project	Participant - Resource	A user assigned to a project as a project participant will automatically be assigned this right. The right allows the user access to Action Items, Project Calendar, Document Manager and Discussions.
Report - Run		Group	Project Manager	Allows user to run a specific report. The right also allows editing of the scheduled report properties and viewing of the output of the report. This right is dependent on Reports - Access being granted.
Resource - Enter Time		Resource	Sutherland, Joy	Allows user to complete and submit timesheets for a resource.
Resource - Self (Auto)		Resource	Sutherland, Joy	Rights automatically granted to a resource when created. Includes Resource - Edit Ideas.
User Favorites Menu - Edit		Resource	Sutherland, Joy	Allows user to view and edit a favorites menu.
OBS Unit				
Application - Edit	Organizational: Application Management	Resource	Sutherland, Joy	Allows user to edit a specific Application. Includes Application - View and the ability to delete the Application, but does not include the Application - Navigate right.
Project - Edit	Organizational:Business Technologies	Group	Project Manager	Allows user to edit all parts of a project except for Document Management, Calendar, Action Items, Discussions and Custom Defined Fields.
Project - View	Organizational:Social Networking	OBS Unit	Resource Pool:Development	Allows user to view the general, management, financial and opportunity properties, custom defined fields, roster, tasks, processes and sub-projects for the project.

Report Example 1: Grouped by Resource, Instance Rights Drill Down to Subreport

User Access Rights

Resource	Primary Role	Resource Manager	Access Right Type	Access Right To OBS Unit	Granted Through Type	Granted Through
Project - Create						
Allows user to create a new project specifying general project properties. Includes Project - Create from Template right.						
Olney, Pam	Project Manager	Miller, Rosie	Global		Group	Project Creator
Thompson, Peter	Project Manager	Miller, Rosie	Global		Group	Project Creator
Project - Edit						
Allows user to edit all parts of a project except for Document Management, Calendar, Action Items, Discussions and Custom Defined Fields.						
Martin, Paul	Project Manager	Miller, Rosie	OBS Unit	Organizational: Mobile Initiatives	Resource	Martin, Paul
Reed, Henry	Project Manager	Miller, Rosie	OBS Unit	Organizational:Business Technologies	Group	Project Manager
Sutherland, Joy	Project Manager	Miller, Rosie	OBS Unit	Organizational:Business Technologies	Group	Project Manager
Project - Manager (Auto)						
The user who enables a project for management is automatically granted this right. In other words, the user becomes the Project Manager for the project. It allows user to view and edit the general and management properties of the project.						
Berks, Paul	Project Manager	Kumar, Arun	Instance		Resource	Berks, Paul
Granger, Paula	Project Manager	Miller, Rosie	Instance		Resource	Granger, Paula
Martin, Paul	Project Manager	Miller, Rosie	Instance		Resource	Martin, Paul
McCarthy, John	Project Manager	Kumar, Arun	Instance		Resource	McCarthy, John
Paxton, Robyn	Project Manager	Miller, Rosie	Instance		Resource	Paxton, Robyn
Reed, Henry	Project Manager	Miller, Rosie	Instance		Resource	Reed, Henry
Riviera, Alex	Project Manager	Miller, Rosie	Instance		Resource	Riviera, Alex
Sutherland, Joy	Project Manager	Miller, Rosie	Instance		Resource	Sutherland, Joy
Tanner, Paul	Project Manager	Miller, Rosie	Instance		Resource	Tanner, Paul
Project - View						
Allows user to view the general, management, financial and opportunity properties, custom defined fields, roster, tasks, processes and sub-projects for the project.						
Amos, Cheryl	Developer	Miller, Rosie	OBS Unit	Organizational:Social Networking	OBS Unit	Resource Pool:Development
Bauer, Joyce	Network Engineer	Miller, Rosie	OBS Unit	Organizational:Mobile Initiatives	OBS Unit	Resource Pool:Operations
Berks, Paul	Project Manager	Kumar, Arun	OBS Unit	Organizational:Social Networking	OBS Unit	Resource Pool:Development
Berry, Jason	Developer	Miller, Rosie	OBS Unit	Organizational:Mobile Initiatives	OBS Unit	Resource Pool:Operations
Chasen, Nicole	Business Analyst	Miller, Rosie	OBS Unit	Organizational:Mobile Initiatives	OBS Unit	Resource Pool:Operations
Evans, Nick	Business Analyst	Miller, Rosie	OBS Unit	Organizational:Mobile Initiatives	OBS Unit	Resource Pool:Operations
Garcia, Alex	Network Engineer	Miller, Rosie	OBS Unit	Organizational:Mobile Initiatives	OBS Unit	Resource Pool:Operations
Gaurand, Alicia	Test Engineer	Miller, Rosie	OBS Unit	Organizational:Social Networking	OBS Unit	Resource Pool:Development

Report Example 2: Grouped by Access Right, No Drill Down to Subreport

User Access Rights Detail Subreport

The User Access Rights Detail subreport displays the instances (e.g., portlet, project, portfolio, etc.) to which a resource has access for one instance level right. It includes the following columns: instance name, instance ID, and description.

User Access Rights Detail

Portlet - View

Instance Name	Instance ID	Description
Current Issues	cop.currentIssues	Pie Chart: Current Issues displays issues, within the days outlook, grouped by priority across projects
Current Issues Listing	cop.currentIssuesListingLinkable	Current Issues Listing displays details about issues, within the days outlook, indicating whether the target resolution date of an issue is on track
Milestones	cop.prt.upcomingMilestones	Milestones provides a list of project milestones and schedule indicators within the days outlook
My Projects	projmgr.homeHotList	Favorite projects
Project Manager Cost and Effort Dashboard	cop.projectManagerCostDashboard	Project Manager Cost and Effort Dashboard displays project cost and effort performance amounts and variances
Project Manager Schedule Dashboard	cop.projectManagerScheduleDashboard	Project Manager Schedule Dashboard displays project schedule performance and a Gantt
Schedule Performance	cop.prt.schedulePerformance	Column Chart: Schedule Performance displays the number of late tasks categorized as critical late, past due or scheduled late within the days outlook
Schedule Performance Details	cop.schedulePerformanceLinkable	Schedule Performance Details displays a list of the critical late, past due, or schedule late tasks within the days outlook
Staffing	cop.prt.staffing	Bar Chart: Staffing displays projects that contain unstaffed project roles within the days outlook
Staffing Details	cop.staffingLinkable	Staffing Details shows a list of unstaffed project roles for a selected project within the days outlook

Subreport Example 1: Drill-Down on 'Portlet – View' Access Right

User Access Rights Detail

Project - Participant (Auto)

Instance Name	Instance ID	Description
Meeting Reservation Portal	PR1033	Create a portal enabling meeting reservations from any device. Provide custom templates for all current world-wide room configurations to allow easy entry.
Mobile Advertising	PR1039	Determine mobile, permission based advertising optimized with minimum disruption to ensure acceptance by customers.
Mobile Commerce	PR1041	Initial rollout of commerce applications and services that will be accessible from mobile devices.
Mobile Security	PR1043	Develop new interfaces that combine dialog, explanation and learning technologies to ensure users have adequate control over the behavior of the applications they interact with while conducting financial transactions.
MyLearning Mobile Pilot	PR1044	Web environment for context-aware mobile devices allowing individuals to access their corporate learning plans and additional informaiton contained on the education site and set up a personalized mobile-enabled site.
Social Networking Security Upgrade	PR1035	Using results from the studies of social networking spam, deploy the defenses necessary to ensure security procedures are met across the enterprise.

Subreport Example 2: Drill-Down on 'Project – Participant (Auto)' Access Right

Report Prerequisites:

- The user must have a status of 'Active' to display in the report. Users with a status of 'Inactive' or 'Lock' do not display in the report even if the active flag on the resource is checked.
- Global access rights display if the user is granted at least one Global access right directly, through a group, or through a resource OBS unit used for access rights.
- Instance access rights display if the user is granted at least one Instance access right directly, through a group, or through a resource OBS unit used for access rights.
- OBS Unit access rights display if the user is granted at least one OBS Unit access right directly, through a group, or through a resource OBS unit used for access rights.

Report Definition:

Name:	User Access Rights
ID:	CSP_USR_AccessRights
Description:	User Access Rights (CSP)
Executable Name:	/CSP/User Access Rights

Report Parameters:

Parameter Label Bind Parameter Code	Type Style	Lookup Name Lookup ID	Required Default Value
Resource OBS param_r_obs	Browse Single-select	OBS Filter Browse OBS_BROWSE_FLT_ALL	No
Resource Manager param_manager	Browse Multiple-select	Active and locked Clarity Resources LOOKUP_SEC_RESMGR	No
Primary Role param_role	Browse Multiple-select	Role browse SCH_BROWSE_ROLE	No
Resource param_resource	Browse Multiple-select	Resource browse SCH_BROWSE_RESOURCE	No
Employment Type param_emp_type	Pull-down Multiple-select	Resource Type SRM_RESOURCE_TYPE	No
Access Right Type param_right_type	Pull-down Multiple-select	Report (Global, Instance, OBS Unit) CSP_RPT_USR_RIGHT_TYPE	Yes Global, Instance, OBS Unit
Access Right param_right	Browse Multiple-select	Report (Access Rights) CSP_RPT_USR_RIGHT	No
Group By 1 param_group	Pull-down Single-select	Report (Access Right, Resource) CSP_RPT_USR_RIGHT_RES_GROUP	Yes Resource
Group By 2 param_group2	Pull-down Single-select	Report (Access Right Type) CSP_RPT_USR_RIGHT_TYPE_GROUP	Yes Access Right Type
Language param_language	Hidden		Yes Passed via Clarity
User ID param_user_id	Hidden		Yes Passed via Clarity

Parameter Lookup Values:
Employment Type: Contractor, Employee
Access Right Type: Global, Instance, OBS Unit
Group By 1: Access Right, Resource
Group By 2: No Grouping, Access Right Type

Parameter Explanations:

- The Resource OBS parameter allows you to control which resources display in the report. When you select an OBS unit in this parameter, the report will display the resources attached to the OBS unit you select and the resources attached to any OBS units that are descendent units of the OBS unit you select.
- The Access Right Type parameter allows you to select which type of access right to include in the report. The following options are available:

  Global The report displays global access rights granted via the resource, group or resource OBS unit.

  Instance The report displays instance access rights granted via the resource, group or resource OBS unit.

  OBS Unit The report displays OBS unit access rights granted via the resource, group or resource OBS unit.

- The report has a Group By 1 parameter that allows you to control how the report is grouped. The following group options are available:

  Access Right This option groups the body of the report by access right name and description. It allows you to display a list of all resources with a particular right. If you group the report by access right, there is no drill down to the subreport.

  Resource This option groups the body of the report by resource. If you group the report by resource, there is a drill down to the subreport.

- The report has a Group By 2 parameter that allows you to control how the report is sub-grouped. The following sub-group options are available:

  No Grouping This option does not group the report so you should select this value if you do not want to do a sub-grouping.

  Access Right Type This option does a sub-grouping by access right type. The access right type sub-groupings include: global, instance, and OBS unit.

Report Fields and Calculations:

If the report is grouped by resource, then the report displays the following columns: access right name, access right type, access right to OBS unit, granted through type, granted through, and access right description. The access right type does not display as a column if the report is sub-grouped by this option. If the report is grouped by resource, the instance level rights drill down to the User Access Rights Detail subreport displaying the instance names to which the user has access.

If the report is grouped by access right, then the report displays the following columns: resource name, primary role, resource manager, access right type, access right to OBS unit, granted through type, and granted through. The access right type does not display as a column if the report is sub-grouped by this option. The grouping displays the access right name and description. If the report is grouped by access right, the report does not drill down to the subreport.

This report contains the following columns:

Access Right To OBS Unit This column displays data if the Access Right Type is 'OBS Unit'. In this case, the column displays the OBS Type and Unit to which the user has access for the access right.

Granted Through Type

This column displays how the access right is granted. The options include:

Resource – The access right is assigned directly to the user.

Group – The access right is assigned to a group and the resource belongs to the group.

OBS Unit – The access right is assigned to a resource OBS unit and, depending on the OBS association mode; the resource is associated to the unit, an ancestor unit, or a descendent unit. The resource OBS must have the option set that it is 'Used for Access Rights' (*Administration/Organization and Access/OBS*). If this option is checked, then the OBS units display an 'Access Rights for this Unit' tab where you may assign rights to the OBS unit. Any resources belonging to the unit will receive these rights, depending upon the OBS association mode.

Granted Through

This column displays the specific resource, group, or OBS unit through which the access right is granted.

Granted Trough Type	Granted Through
Resource	The resource name displays.
Group	The group name displays.
OBS Unit	The OBS type and unit name display.

Subreport Fields and Calculations:

The subreport is for one instance level right and resource. It displays the instances (e.g., portlet, project, portfolio, etc.) to which a resource has access for the instance level right. It includes the following columns: instance name, instance ID, and description.

Report Security and Technical Details:

Security is determined by resource view rights.

Topic	Database Statement	Additional Explanation
Resources only are included.	srm_resources.person_type <> 0	Roles are excluded.
Users with a status of 'Active' are included.	cmn_sec_users.user_status_id = 200	Users with a status of 'Inactive' or 'Lock' are excluded.

Chapter 10: Access Groups

This section contains the following topics:

About Access Groups

The following access groups are included with the PMO Accelerator add-in and have global and instance level access rights associated to them. The Solution Pack updates these groups to include access rights related to Xcelsius dashboards and Crystal reports installed with the Solution Pack add-in. When you add resources to these groups as members, the resources automatically inherit the rights of the group. The groups are meant to be implemented in a matrix fashion, which means that a resource will probably be associated to more than one group in order to obtain all the rights the resource should have.

For more information about the PMO access groups, see the *PMO Accelerator Product Guide*. For more information about groups, see the *Administration Guide*.

PMO Executive Viewer

Members of the PMO Executive Viewer group view all project properties, status reports, schedules, and resource allocations; run project and resource capacity reports.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Page - View)	Project Management	PPM Dashboards
		KPIs by Project Type
		Top 50 Project Watchlist
		Project Status
		Resource Shortages and Allocations
Instance (Portlet - View)	Project Management	KPIs by Project Type
		Top 50 Project Watchlist
		Project Status
		Resource Shortages and Allocations
Instance (Report – Run)	Project Management	KPIs by Project Type
		Project Portfolio Summary
		Project List
		Project Status Report List
		Project Status Summary
		Project Status Detail
		Project Risk, Issue, and Change Summary
		Project Risk Register
		Project Issue Register
		Project Change Request Register
		Unstaffed Allocations by Project Type
		Project Allocations by Employment Type
		Investment Allocations and Assignments
	Resource Management	Capacity vs. Allocation by OBS
		Capacity vs. Booking Status by OBS
		Capacity vs. Demand by Role
		Capacity vs. Demand by Resource
		Over/Under Allocation by Role
		Over/Under Allocation by Resource
		Resource Skills
		Resource Skills and Remaining Capacity
		Resource Forecasted Utilization
		Resource Forecasted Utilization Detail
		Resource Allocations and Assignments

Type	Area	Access Right
		Resource Availability
	Time Management	Resource Time Review by Manager Resource Time Summary and Detail Time Compliance Missing Time

PMO Executive Viewer Extended

Members of the PMO Executive Viewer Extended group view all project properties, status reports, schedules, resource allocations, baselines and financials; run project, resource capacity and financial reports.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Page - View)	Project Management	PPM Dashboards KPIs by Project Type Top 50 Project Watchlist Project Status Resource Shortages and Allocations
Instance (Portlet - View)	Project Management	KPIs by Project Type Top 50 Project Watchlist Project Status Resource Shortages and Allocations
Instance (Report – Run)	Project Management	KPIs by Project Type Project Portfolio Summary Project List Project Planning Schedule Project Schedule Project Cost and Effort Project Task Dependencies Key Task and Milestone Status Project Earned Value Project Storyboard Project Status Report List Project Status Summary Project Status Detail Project Risk, Issue, and Change Summary Project Risk Register Project Issue Register

Type	Area	Access Right
		Project Change Request Register Unstaffed Allocations by Project Type Project Allocations by Employment Type Investment Allocations and Assignments Investment Assignments by Task Investment Baseline vs. Plan by Task Investment Time and Estimate Review
	Resource Management	Resource Baseline vs. Plan by Employment Type Capacity vs. Allocation by OBS Capacity vs. Booking Status by OBS Capacity vs. Demand by Role Capacity vs. Demand by Resource Over/Under Allocation by Role Over/Under Allocation by Resource Resource Skills Resource Skills and Remaining Capacity Resource Forecasted Utilization Resource Forecasted Utilization Detail Resource Allocations and Assignments Resource Assignments by Task Resource Availability
	Time Management	Resource Time Review by Manager Resource Time Summary and Detail Time Compliance Missing Time
	Financial Management	Financial Capitalization by Investment Financial Forecast Review by Investment Financial Forecast Review by Plan Grouping Financial Budget vs. Forecast by Period Investment Transaction Inquiry

PMO Financial Administrator

Members of the PMO Financial Administrator group manage functionality related to project financial plans, including the ability to create and edit any financial plan and approve budgets; create and edit financial transactions against any project.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Project Management	Project Portfolio Summary
		Project List
	Financial Management	Financial Capitalization by Investment
		Financial Forecast Review by Investment
		Financial Forecast Review by Plan Grouping
		Financial Budget vs. Forecast by Period
		Investment Transaction Inquiry

PMO Investment Viewer Extended

Members of the PMO Investment Viewer Extended group view properties, resource allocations, and financial plans of all investment types.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Page - View)	Project Management	PPM Dashboards
		KPIs by Project Type
		Top 50 Project Watchlist
		Project Status
		Resource Shortages and Allocations
Instance (Portlet - View)	Project Management	KPIs by Project Type
		Top 50 Project Watchlist
		Project Status
		Resource Shortages and Allocations
Instance (Report – Run)	Project Management	KPIs by Project Type
		Project Portfolio Summary
		Project List
		Project Planning Schedule
		Project Schedule
		Project Cost and Effort

Type	Area	Access Right
		Project Task Dependencies
		Key Task and Milestone Status
		Project Earned Value
		Project Storyboard
		Project Status Report List
		Project Status Summary
		Project Status Detail
		Project Risk, Issue, and Change Summary
		Project Risk Register
		Project Issue Register
		Project Change Request Register
		Unstaffed Allocations by Project Type
		Project Allocations by Employment Type
		Investment Allocations and Assignments
		Investment Assignments by Task
		Investment Baseline vs. Plan by Task
		Investment Time and Estimate Review
	Resource Management	Resource Baseline vs. Plan by Employment Type
		Capacity vs. Allocation by OBS
		Capacity vs. Booking Status by OBS
		Capacity vs. Demand by Role
		Capacity vs. Demand by Resource
		Over/Under Allocation by Role
		Over/Under Allocation by Resource
		Resource Skills
		Resource Skills and Remaining Capacity
		Resource Forecasted Utilization
		Resource Forecasted Utilization Detail
		Resource Allocations and Assignments
		Resource Assignments by Task
		Resource Availability
	Time Management	Resource Time Review by Manager
		Resource Time Summary and Detail
		Time Compliance
		Missing Time
	Financial Management	Financial Capitalization by Investment
		Financial Forecast Review by Investment
		Financial Forecast Review by Plan Grouping
		Financial Budget vs. Forecast by Period
		Investment Transaction Inquiry

PMO Portfolio Manager

Members of the PMO Portfolio Manager group manage portfolios across investments.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Portfolio Management	Portfolio Plan Comparison
		Portfolio Plan Changes
		Portfolio Plan Changes – Waterline and Rank

PMO Program Manager

Members of the PMO Program Manager group manage programs containing several projects.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Program Management	Program Status Detail
		Program Budget vs. Forecast by Period
	Project Management	Project Risk, Issue, and Change Summary
		Project Risk Register
		Project Issue Register
		Project Change Request Register

PMO Project Manager

Members of the PMO Project Manager group manage project properties, status reports, schedules, and resource allocations.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Page - View)	Project Management	PPM Dashboards
		KPIs by Project Type
		Top 50 Project Watchlist
		Project Status
Instance (Portlet - View)	Project Management	KPIs by Project Type
		Top 50 Project Watchlist
		Project Status

Type	Area	Access Right
Instance (Report – Run)	Project Management	KPIs by Project Type
		Project Portfolio Summary
		Project List
		Project Status Report List
		Project Status Summary
		Project Status Detail
		Project Risk, Issue, and Change Summary
		Project Risk Register
		Project Issue Register
		Project Change Request Register
		Unstaffed Allocations by Project Type
		Project Allocations by Employment Type
		Investment Allocations and Assignments
	Resource Management	Capacity vs. Allocation by OBS
		Capacity vs. Booking Status by OBS
		Capacity vs. Demand by Role
		Capacity vs. Demand by Resource
		Over/Under Allocation by Role
		Over/Under Allocation by Resource
		Resource Forecasted Utilization
		Resource Forecasted Utilization Detail
		Resource Allocations and Assignments
		Resource Availability
	Time Management	Resource Time Review by Manager
		Resource Time Summary and Detail
		Time Compliance
		Missing Time

PMO Project Manager Extended

Members of the PMO Project Manager Extended group manage project properties, status reports, schedules, resource allocations, tasks, baselines, and financial plans.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Page - View)	Project Management	PPM Dashboards KPIs by Project Type Top 50 Project Watchlist Project Status Resource Shortages and Allocations
Instance (Portlet - View)	Project Management	KPIs by Project Type Top 50 Project Watchlist Project Status Resource Shortages and Allocations
Instance (Report – Run)	Project Management	KPIs by Project Type Project Portfolio Summary Project List Project Planning Schedule Project Schedule Project Cost and Effort Project Task Dependencies Key Task and Milestone Status Project Earned Value Project Storyboard Project Status Report List Project Status Summary Project Status Detail Project Risk, Issue, and Change Summary Project Risk Register Project Issue Register Project Change Request Register Unstaffed Allocations by Project Type Project Allocations by Employment Type Investment Allocations and Assignments Investment Assignments by Task Investment Baseline vs. Plan by Task Investment Time and Estimate Review

Type	Area	Access Right
	Resource Management	Resource Baseline vs. Plan by Employment Type Capacity vs. Allocation by OBS Capacity vs. Booking Status by OBS Capacity vs. Demand by Role Capacity vs. Demand by Resource Over/Under Allocation by Role Over/Under Allocation by Resource Resource Skills Resource Skills and Remaining Capacity Resource Forecasted Utilization Resource Forecasted Utilization Detail Resource Allocations and Assignments Resource Assignments by Task Resource Availability
	Time Management	Resource Time Review by Manager Resource Time Summary and Detail Time Compliance Missing Time
	Financial Management	Financial Capitalization by Investment Financial Forecast Review by Investment Financial Forecast Review by Plan Grouping Financial Budget vs. Forecast by Period Investment Transaction Inquiry

PMO Project Viewer

Members of the PMO Project Viewer group view all projects and project related portlets and reports.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Project Management	Project Portfolio Summary
		Project List
		Project Status Report List
		Project Status Summary
		Project Status Detail
		Project Risk, Issue, and Change Summary
		Project Risk Register
		Project Issue Register
		Project Change Request Register

PMO Resource Administrator

Members of the PMO Resource Administrator group create new resources or roles and edit the properties for any resource; view all projects and adjust resource allocations across projects.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Resource Management	Capacity vs. Allocation by OBS
		Capacity vs. Booking Status by OBS
		Capacity vs. Demand by Role
		Capacity vs. Demand by Resource
		Over/Under Allocation by Role
		Over/Under Allocation by Resource
		Resource Skills
		Resource Skills and Remaining Capacity
		Resource Forecasted Utilization
		Resource Forecasted Utilization Detail
		Resource Allocations and Assignments
		Resource Availability
	Time Management	Resource Time Review by Manager
		Resource Time Summary and Detail
		Time Compliance
		Missing Time

PMO Resource Manager

Members of the PMO Resource Manager group manage the schedules of direct reports, adjust their allocations on projects, and view all projects.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Project Management	Project Portfolio Summary
		Project List
		Unstaffed Allocations by Project Type
		Project Allocations by Employment Type
		Investment Allocations and Assignments
	Resource Management	Capacity vs. Allocation by OBS
		Capacity vs. Booking Status by OBS
		Capacity vs. Demand by Role
		Capacity vs. Demand by Resource
		Over/Under Allocation by Role
		Over/Under Allocation by Resource
		Resource Forecasted Utilization
		Resource Forecasted Utilization Detail
		Resource Allocations and Assignments
		Resource Availability
	Time Management	Resource Time Review by Manager
		Resource Time Summary and Detail
		Time Compliance
		Missing Time

PMO Resource Manager Extended

Members of the PMO Resource Manager Extended group manage the schedules of direct reports, adjust their allocations on projects and skills, access requisitions, and view all projects.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Project Management	Project Portfolio Summary
		Project List
		Unstaffed Allocations by Project Type
		Project Allocations by Employment Type
		Investment Allocations and Assignments

Type	Area	Access Right
	Resource Management	Capacity vs. Allocation by OBS Capacity vs. Booking Status by OBS Capacity vs. Demand by Role Capacity vs. Demand by Resource Over/Under Allocation by Role Over/Under Allocation by Resource Resource Skills Resource Skills and Remaining Capacity Resource Forecasted Utilization Resource Forecasted Utilization Detail Resource Allocations and Assignments Resource Availability
	Time Management	Resource Time Review by Manager Resource Time Summary and Detail Time Compliance Missing Time

PMO Timesheet Administrator

Members of the PMO Timesheet Administrator group manage timesheet approval; submit and approve all timesheets.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Report – Run)	Time Management	Resource Time Review by Manager Resource Time Summary and Detail Time Compliance Missing Time

PMO Vendor Management

Members of the PMO Vendor Management group access vendor related reports and views.

The following are the access rights included with this group.

Type	Area	Access Right
Instance (Page - View)	Project Management	PPM Dashboards KPIs by Project Type
	Vendor Management	Top 10 Vendor Analysis **Note:** PPM Dashboards and KPIs by Project Type granted above for the Project Management dashboards are required for the Vendor Management dashboard.
Instance (Portlet - View)	Vendor Management	Top 10 Vendor Analysis
Instance (Report – Run)	Vendor Management	Vendor Baseline vs. Plan by Resource Vendor Actuals and Allocations by Resource Vendor Time Review by Resource