opentext™

Project and Portfolio Management Center

Software version: Content Pack 1.0

Vertica for PPM User's Guide

Document release date: May 2020

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Welcome to Vertica for PPM

Vertica for OpenText ™ Project and Portfolio Management Center (PPM) Content Pack 1.0 provides you with rich resource management data in a dimensional model schema of the Vertica data warehousing. You can connect your Business Intelligence solution to Vertica data warehouse to generate reports and dashboards in real time. This content pack also includes 13 Microsoft Excel templates, which enables you to generate Excel-based reports in PPM.

This guide provides information about how to generate reports on Resource Management with Vertica for PPM and descriptions of these 13 reports. You can extend this content pack to enable other PPM modules by referring to the *Vertica for PPM Reporting Customization Guide for Content Pack 1.0*.

For instructions on generating customized Excel reports, see *PPM9.50Excel Reports Cookbook*.

> **Note:** Vertica for PPM Content Pack 1.0 supports the Resource Management module only. You can extend this content pack to enable other PPM modules by referring to the *Vertica for PPM Reporting Customization Guide for Content Pack 1.0*.

Audience for this Document

This document is written for PPM users, particularly users who act as direct managers, resource managers, and project managers.

Vertica for PPM Content on marketplace

To access Vertica for PPM content on the Marketplace:

1. Go to the Operational Reports Content for Project and Portfolio Management page.

2. Download Vertica for PPM 1.0.

Use Excel Reports for Vertica for PPM

This section provides instructions on how to use the Microsoft Excel version of the reports that are supplied with Vertica for PPM from PPM.

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The OOTB Vertica for PPMExcel reports include:

- Top 10 Skills Requested Report
- Resource Location Distribution Report
- Demand vs Supply Report
- Resource Pools Allocation Report
- Resource Distribution Report
- Resource Assignment Report
- Resource Utilization Report
- Project Resource Leave Report
- Resource Leave Report
- Hot Positions Report
- Position Demand Trend and Prediction Report
- Resource Profile by Project Report
- Resource Profile by Resource Pool Report

Software Requirements

You should meet the following requirements to use Excel reports for Vertica for PPM:

- PPM 9.3x

  For instructions on installing PPM 9.30, see *Installation and Administration Guide*.

  For instructions on upgrading to PPM 9.30, see *Upgrade Guide*.

- Vertica for PPM Content Pack 1.0

  For information about installing Vertica for PPM Content Pack 1.0, see *Vertica for PPM Administrator Guide for Content Pack 1.0*.

- Microsoft Excel 2013

Configuring the PPM Server to Use the Excel Reports

To use the Excel reports for Vertica for PPM, add the following data resource and resource link into the `server.xml` file in the *<PPM_HOME>*`/server/`*<Instance Name>*`/conf/` folder.

Parameter Name	Description	Add
`GlobalNamingResources`	Defines the data source, user name, and password	`<Resource maxIdle="10" driverClassName="com.vertica.jdbc.Driver" type="javax.sql.DataSource" auth="Container" name="VerticaDS" url="`*<vertica_db_url>*`" username="`*<username>*`" password="`*<password>*`" maxActive="60" validationQuery="select 1 from dual" maxWait="180000" minEvictableIdleTimeMillis="3600000"/` **Note:** You need to replace `<vertica_db_url>`, `<username>`, and `<password>` with the Vertica database server address, user name, and password of the Vertica database account respectively.

`docBase="itg.war"`
 	
`docBase="dashboard.war"`
	Defines the resource link	`<ResourceLink type="javax.sql.DataSource" name="VerticaDS" global="VerticaDS"/>`

Note: You need to restart the PPM server after you made these changes.

Running Excel Reports

You can run Excel reports with Vertica for PPM as you run other PPM reports.

For information about how to run reports, see *PPM9.50Reports Guide and Reference*.

The following is a list of reports you can run with Vertica for PPM:

- "Top 10 Skills Requested Report" on the next page
- "Resource Location Distribution Report" on page 10
- "Demand vs Supply Report" on page 11
- "Resource Pools Allocation Report" on page 13
- "Resource Distribution Report" on page 14
- "Resource Assignment Report" on page 15
- "Resource Utilization Report" on page 19
- "Project Resource Leave Report" on page 22
- "Resource Leave Report" on page 23
- "Hot Positions Report" on page 24
- "Position Demand Trend and Prediction Report" on page 25
- "Resource Profile by Project Report" on page 26
- "Resource Profile by Resource Pool Report" on page 27
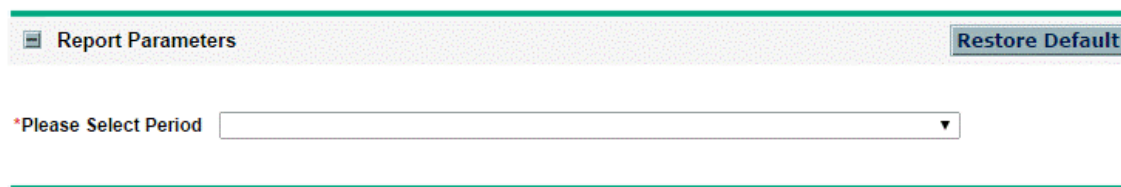
In Vertica for PPM Content Pack 1.0 supplies only Resource Management reports. However, you can extend this content pack to enable other PPM modules by referring to the *Vertica for PPM Reporting Customization Guide for Content Pack 1.0*.

For instructions on generating customized Excel reports, see *PPM9.50Excel Reports Cookbook*.

Top 10 Skills Requested Report

This report lists the 10 skills that are requested most frequently during a specified time period. This report includes the trend compared with the last period and the skill distribution patterns. It also shows the trend of the 10 skills requested in the past two years.

As a resource manager, you can leverage this report for hiring and training planning.

Parameter description

Parameter	Description
Period	The time interval for data displayed in the report. Select one of the following values: • This Year • This Quarter • This Month

The following are two sample reports.

Top 10 requested skills

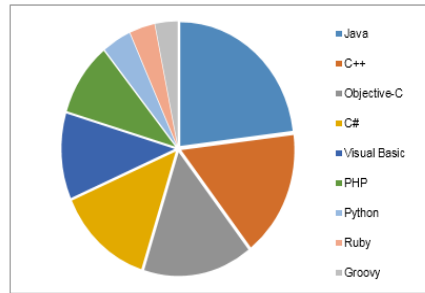| Date Range:	This Month

Skill Request Time = The moment when the request was sent
Percentage = Requested hours of a skill/ Total requested hours for all skills

Skill	Requested (%)	Rank (current period)	Rank (last period)	Trend
C	19.82%	1	1	⇨
Java	18.48%	2	2	⇨
C++	13.14%	3	4	⬆
Objective-C	12.42%	4	3	⬇
C#	10.88%	5	5	⇨
Visual Basic	8.93%	6	6	⇨
PHP	7.60%	7	7	⇨
Python	3.29%	8	8	⇨
Ruby	2.87%	9	10	⬆
Groovy	2.57%	10	9	⬇

Top Skills Trend

Date Range:	2014-01-01 to 2014-09-30	Period Type:	Monthly

Skill Request Time = The moment when the request was sent
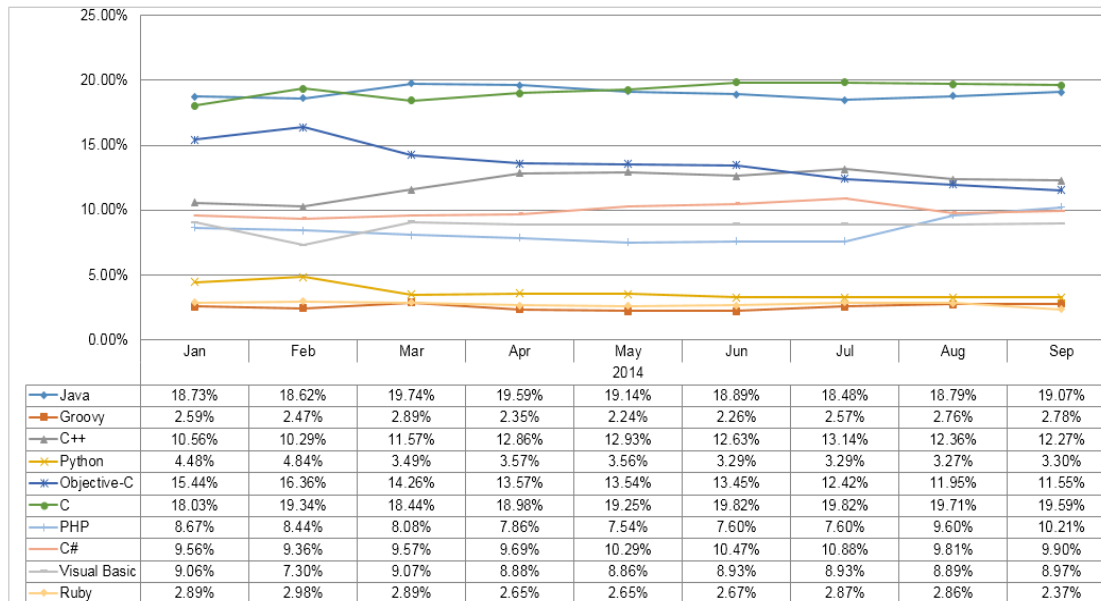Percentage = Requested hours of a skill/ Total requested hours for all skills

	Jan	Feb	Mar	Apr	May 2014	Jun	Jul	Aug	Sep
Java	18.73%	18.62%	19.74%	19.59%	19.14%	18.89%	18.48%	18.79%	19.07%
Groovy	2.59%	2.47%	2.89%	2.35%	2.24%	2.26%	2.57%	2.76%	2.78%
C++	10.56%	10.29%	11.57%	12.86%	12.93%	12.63%	13.14%	12.36%	12.27%
Python	4.48%	4.84%	3.49%	3.57%	3.56%	3.29%	3.29%	3.27%	3.30%
Objective-C	15.44%	16.36%	14.26%	13.57%	13.54%	13.45%	12.42%	11.95%	11.55%
C	18.03%	19.34%	18.44%	18.98%	19.25%	19.82%	19.82%	19.71%	19.59%
PHP	8.67%	8.44%	8.08%	7.86%	7.54%	7.60%	7.60%	9.60%	10.21%
C#	9.56%	9.36%	9.57%	9.69%	10.29%	10.47%	10.88%	9.81%	9.90%
Visual Basic	9.06%	7.30%	9.07%	8.88%	8.86%	8.93%	8.93%	8.89%	8.97%
Ruby	2.89%	2.98%	2.89%	2.65%	2.65%	2.67%	2.87%	2.86%	2.37%

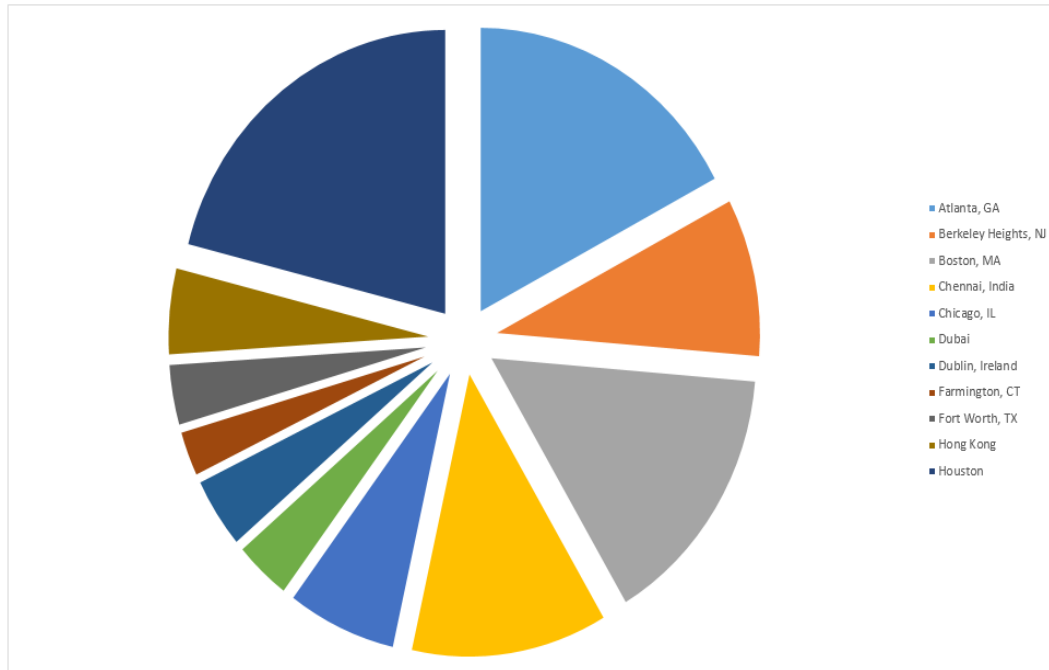# Resource Location Distribution Report

This report shows how the resources are distributed geographically.

As a resource manager, you can leverage this report to understand and optimize all resource's geographical distributions.

You do not need to specify any parameter for this report.

The following is a sample report.

Resources Location Distribution

Demand vs Supply Report

This report shows the resource demand and supply information for a specified resource pool. This report contains a breakdown of over-allocated, on-bench, unmet, soft-booked, and committed resources.

With this report, as a resource manager, you can easily understand the status of the resource utilization and the gap from the upcoming demands.

Parameter description

Parameter	Description
Begin Period	The first time period for which data is displayed in the report. Select a value from the **Available Periods** list.
End Period	The last time period for which data is displayed in the report. Select a value from the **Available Periods** list.
Period Type	The time interval for data displayed in the report. Select one of the following values: • Year • Half Year • Quarter • Month • Week
Resource pool	Determines which resource pools are represented in the report. From the **Resource Pool Name** list, select one resource pool name.

The following is a sample report.

Resource Pool Demand vs Supply

Date Range: 2014-01-01 to 2014-02-09   Period Type: Weekly

Committed = Committed Hours
Pool Capacity = Total hours of named and unnamed resources

	12/29/2013	1/5/2014	1/12/2014	1/19/2014	1/26/2014	2/2/2014	2/9/2014
Over Allocated	0	0	17	32	65	26	32
Bench	78	28	0	0	0	0	0
Unmet	-30	-20	-10	-40	0	-20	0
Softbooked	62	120	101	72	143	78	92
Committed	220	212	276	320	282	308	300
Total Capacity	360	360	360	360	360	360	360
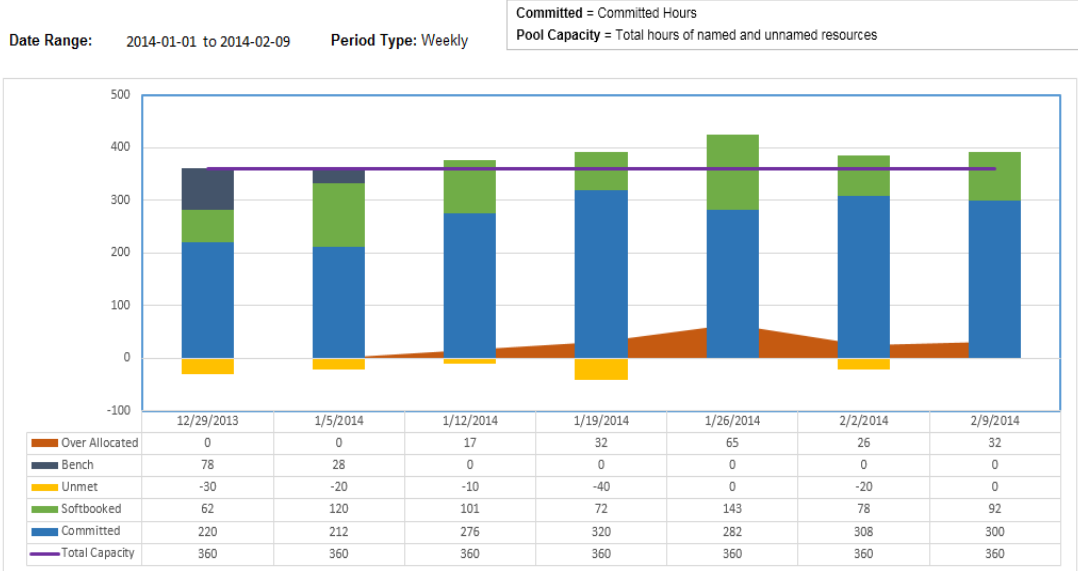
Resource Pools Allocation Report

This report shows how all resource pools are being utilized through both percentage and person hours.

As a portfolio manager, you can leverage this report to understand the overall resource pools allocation status and to plan for resource distributions at a strategic level.

Parameter description

Parameter	Description
Begin Period	The first time period for which data is displayed in the report. Select a value from the **Available Periods** list.
End Period	The last time period for which data is displayed in the report. Select a value from the **Available Periods** list.

The following are two sample reports.

Resource Allocation By Pools (Percentage)

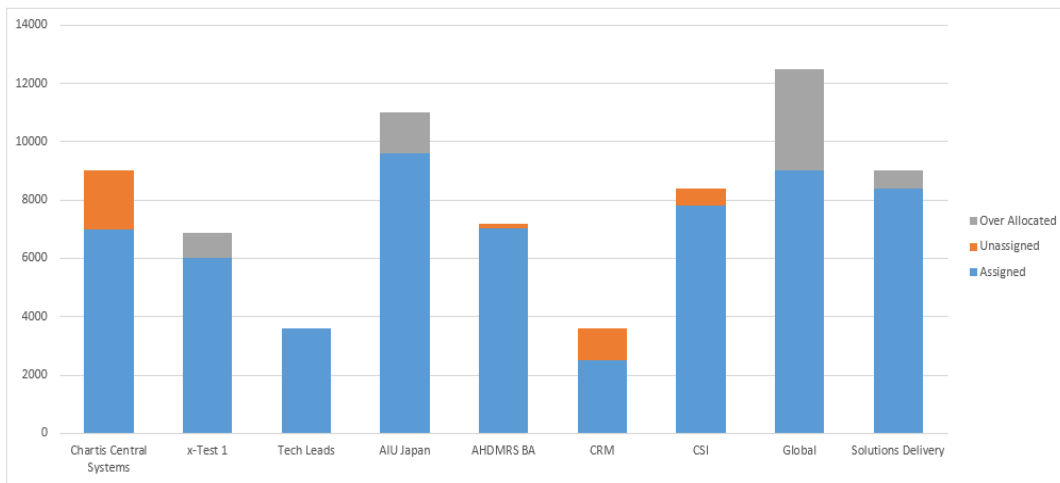Date Range: 2014-01-01 to 2014-2-9

Assigned = Assigned Hours/Total Available Hours
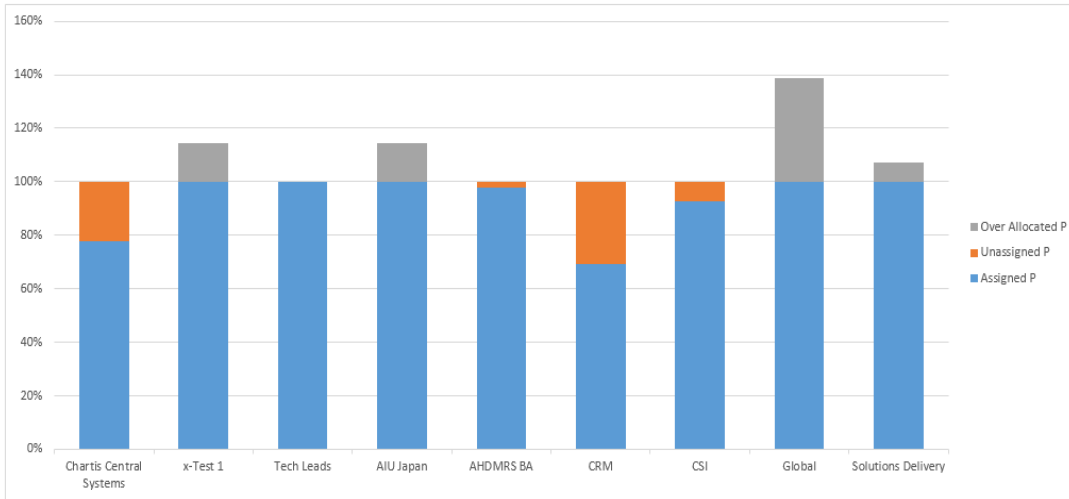
Resource Allocation By Pools (Hours)

Date Range: 2014-01-01 to 2014-2-9

Assigned = Assigned Hours

Resource Distribution Report

This report shows an overview of resource demand distribution on investment directions.

As a portfolio manager, you can leverage this report to understand whether daily execution is fully aligned with the company's strategies defined and tracked in PPM.

You do not need to specify any parameters for this report.

The following is a sample report.

Resource Distribution

Percentage = Total allocated hours for a business objective/ Total allocated hours for all business objective
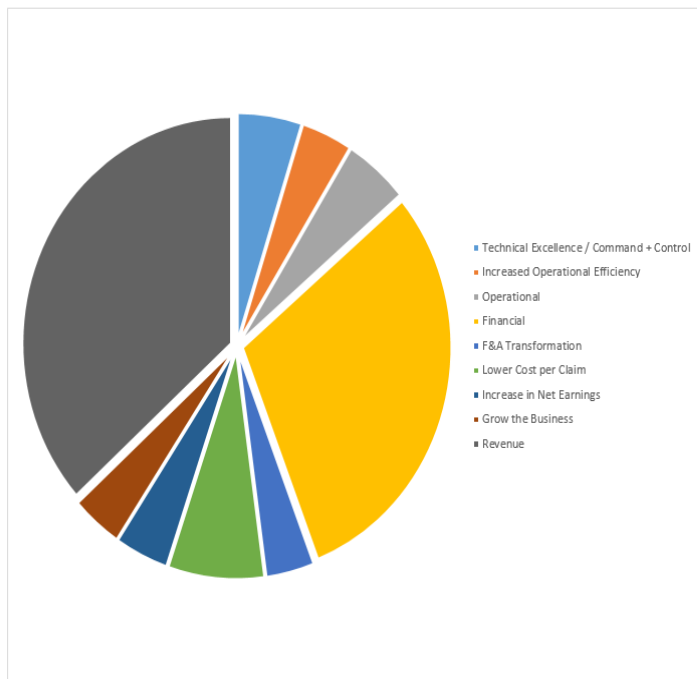
1

Resource Assignment Report

This report shows an overall picture of the resource pool. This report includes the resource assignment details (such as allocated, unassigned, or assigned) in a specified time period.

With this report, as a resource manager, you can also see a person's assignment.
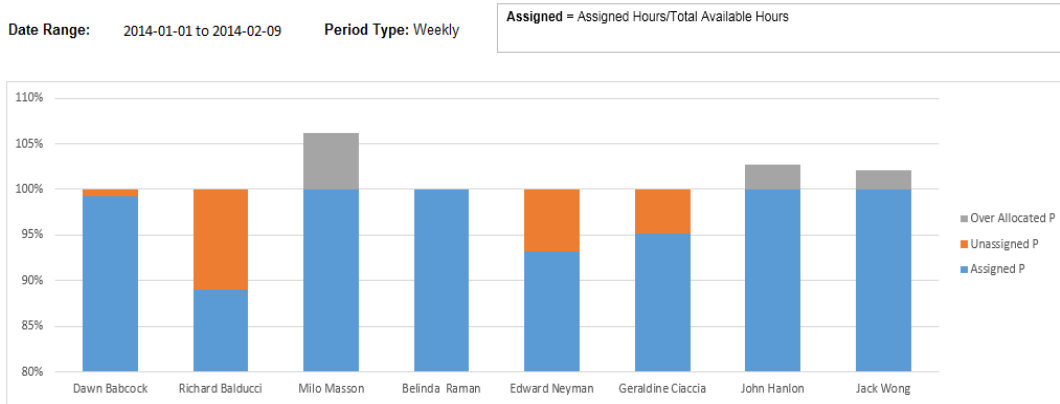
Parameter description

Parameter	Description
Begin Period	The first time period for which data is displayed in the report. Select a value from the **Available Periods** list.
End Period	The last time period for which data is displayed in the report. Select a value from the **Available Periods** list.
Period Type	The time interval for data displayed in the report. Select one of the following values: • Year • Half Year • Quarter • Month • Week
Resource pool	Determines which resource pools are represented in the report. From the **Resource Pool Name** list, select one resource pool name.

The following are some sample reports.

Assignment by Resources (Percentage)

Date Range: 2014-01-01 to 2014-02-09   **Period Type:** Weekly   **Assigned** = Assigned Hours/Total Available Hours

Assignment by Resources (Hours)

Date Range: 2014-01-01 to 2014-02-09   **Period Type:** Weekly   **Assigned** = Assigned Hours
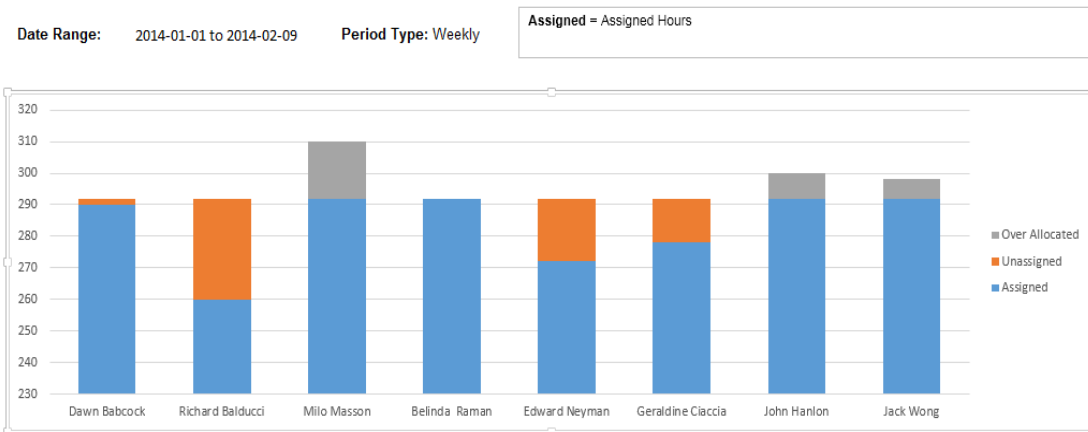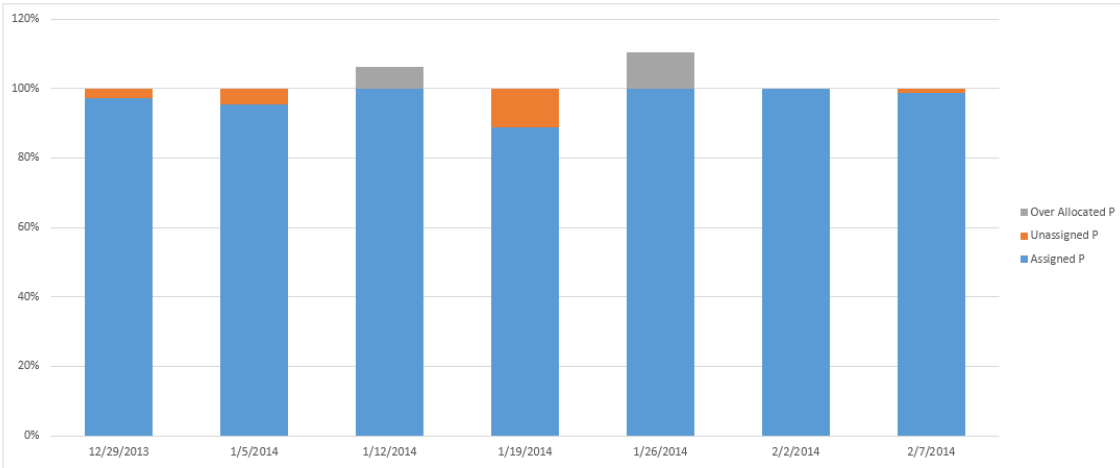
Assignment by Periods (Percentage)

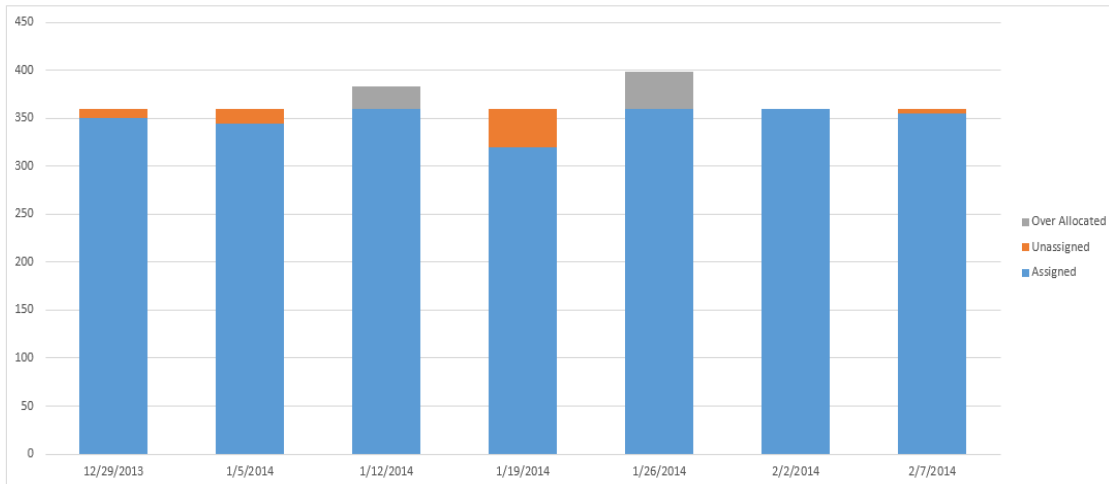**Date Range:** 2014-01-01 to 2014-02-09   **Period Type:** Weekly

Assigned = Assigned Hours/Total Available Hours

Assignment by Periods (Hours)

Date Range: 2014-01-01 to 2014-02-09   **Period Type:** Weekly

Assigned = Assigned Hours

Row Labels	Column Labels ▾						
	2014						
⟟ 1/12/2014	1/19/2014	1/26/2014	1/5/2014	12/29/2013	2/2/2014	2/7/2014
Dawn Babcock							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	38	30	32	31	41	36
Available Capacity	0	0	6	4	5	0	0
Richard Balducci							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	36	36	32	32	38	36
Available Capacity	0	0	0	4	4	0	0
Milo Masson							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	36	36	36	36	36	36
Available Capacity	0	0	0	0	0	0	0
Belinda Raman							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	38	38	32	32	38	36
Available Capacity	0	0	0	4	4	0	0
Edward Neyman							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	36	36	36	36	36	36
Available Capacity	0	0	0	0	0	0	0
Geraldine Ciaccia							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	36	36	36	34	36	36
Available Capacity	0	0	0	0	2	0	0
John Hanlon							
Total Capacity	36	36	36	36	36	36	36
Total Assignments	36	36	36	36	36	36	36
Available Capacity	0	0	0	0	0	0	0
Jack Wong							

Resource Utilization Report

This report summarizes the resource utilization information for a specified project. The resources utilization rate is calculated by dividing actual hours by allocated hours.

As a resource manager, you can leverage this report to understand if the resources assigned to the project are well utilized and adjust resources within the project and between projects.

This report contains utilization information during a time period and utilization information for individual resources.

Parameter description

| Parameter	Description
Begin Period	The first time period for which data is displayed in the report. Select a value from the **Available Periods** list.
End Period	The last time period for which data is displayed in the report. Select a value from the **Available Periods** list.
Period	The time interval for data displayed in the report. Select one of the following values: • Year • Half Year • Quarter • Month • Week
Project Name	Select the project name from the **Project Name** list.

The following are some sample reports.

Resource Utilization by Resources (percent)

Project: Wireless Intrusion Prevention (WIP) Implementation

Date Range: 2014-01-01 to 2014-02-09
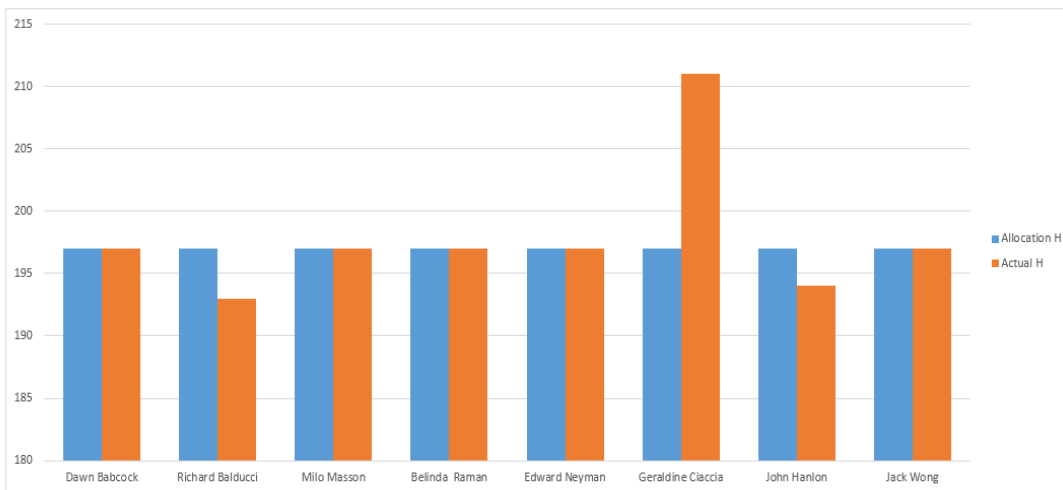
Actual = Actual Hours/Total Assigned Hours
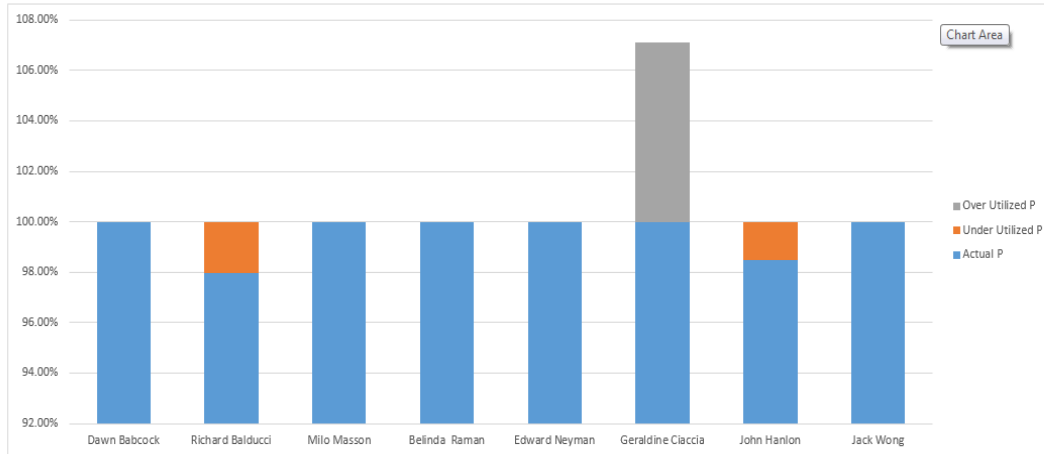
Resource Utilization by Resources (hours)

Project: Wireless Intrusion Prevention (WIP) Implementation

Date Range: 2014-01-01 to 2014-02-09

Allocation = Assigned Hours
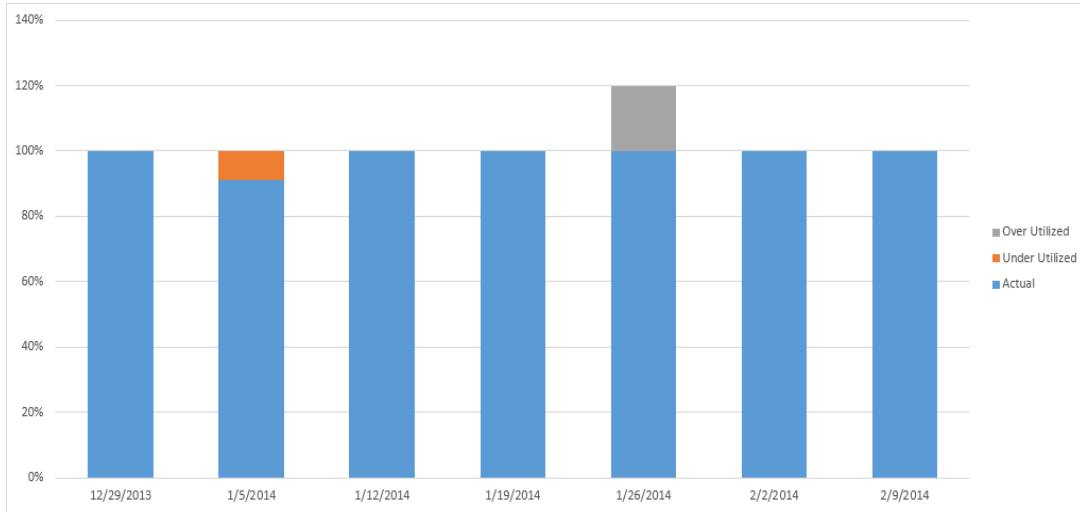**Actual** = Actual Hours

Resource Utilization by Periods

Project: Wireless Intrusion Prevention (WIP) Implementation

Date Range: 2014-01-01 to 2014-02-09   Period Type: Weekly

Actual = Actual Hours/Total Assigned Hours

Project Resource Leave Report

This report shows the resources leave status for a specified project in a given period.

As a project manager, you can leverage this report to understand the resource availability, which can help you plan project schedules more effectively.

Parameter description

Parameter	Description
Begin Period	The first time period for which data is displayed in the report. Select a value from the **Available Periods** list.

Parameter description, continued

Parameter	Description
End Period	The last time period for which data is displayed in the report. Select a value from the **Available Periods** list.
Resource pool	Determines which resource pools are represented in the report. From the **Resource Pool Name** list, select one resource pool name.

The following is a sample report.

Resource Leave Report

This report shows the resources leave status for a specified resource pool in a given period.

If you are a resource manager, this report can give you a big picture of the resource availability in the resource pool you are managing.

Parameter description

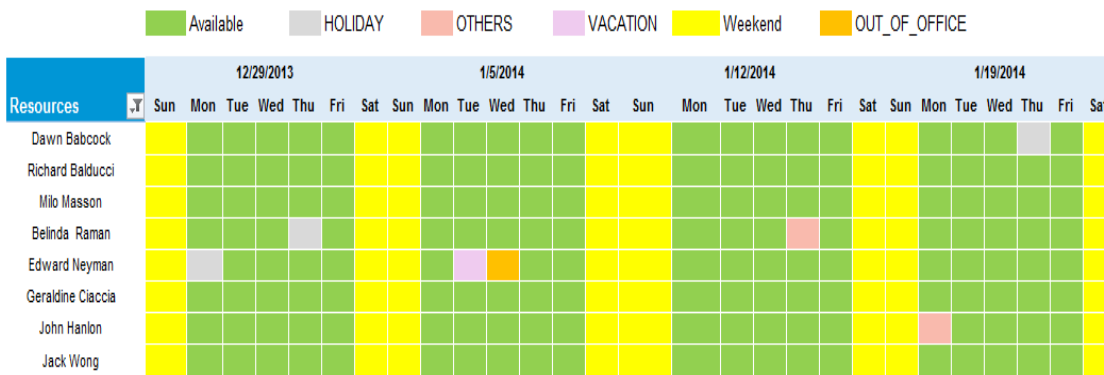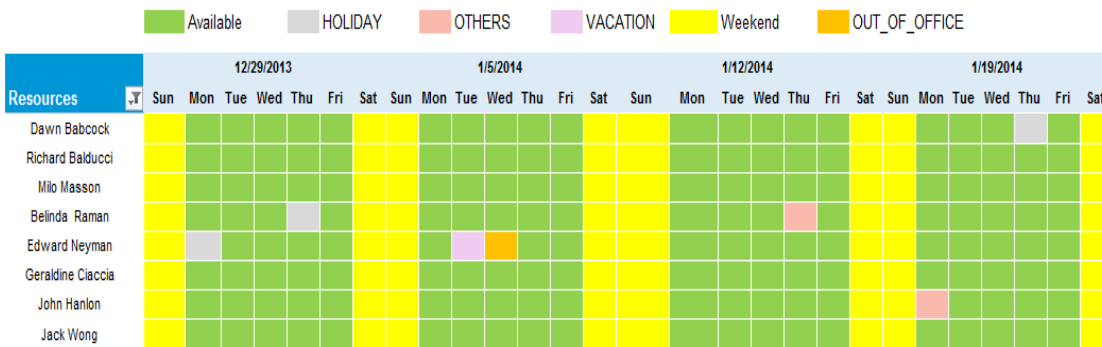| Parameter	Description
Begin Period	The first time period for which data is displayed in the report. Select a value from the **Available Periods** list.
End Period	The last time period for which data is displayed in the report. Select a value from the **Available Periods** list.
Resource pool	Determines which resource pools are represented in the report. From the **Resource Pool Name** list, select one resource pool name.

The following is a sample report.

Hot Positions Report

This report shows the overall picture of positions requested in the past two years. It shows how recently positions were requested, frequency, and volume in a person hour.

As a resource manager, you can leverage this report to understand which positions are most popular among the customers so that you can hire and train resources more effectively.

You do not need to specify any parameter for this report.

The following is a sample report.
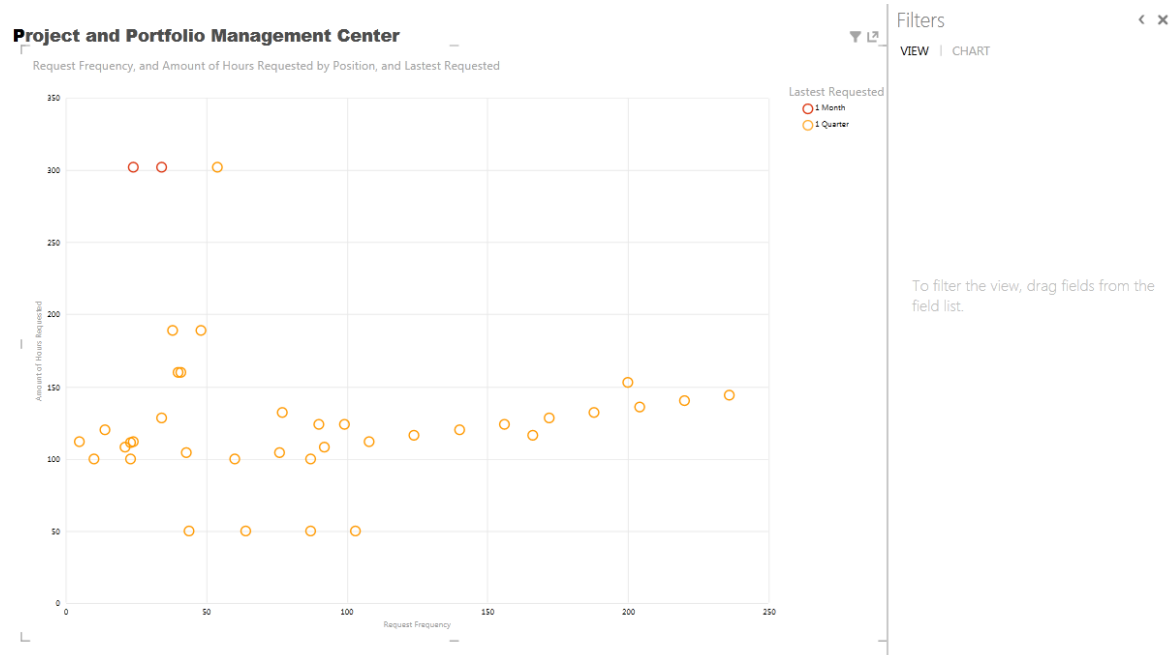
Position Demand Trend and Prediction Report

This report shows the demand of a specified position in the past two years and also predicts the demand in the near future.

As a resource manager, you can leverage this report to hire and train resources more effectively to meet future demands.

This report provides a reasonable predication only when the historical data is complete enough.

Parameter description

Parameter	Description
Position	Select the position that you want to know the trend.

The following is a sample report.

Position Demand Trend and Prediction

Position: Java Developer
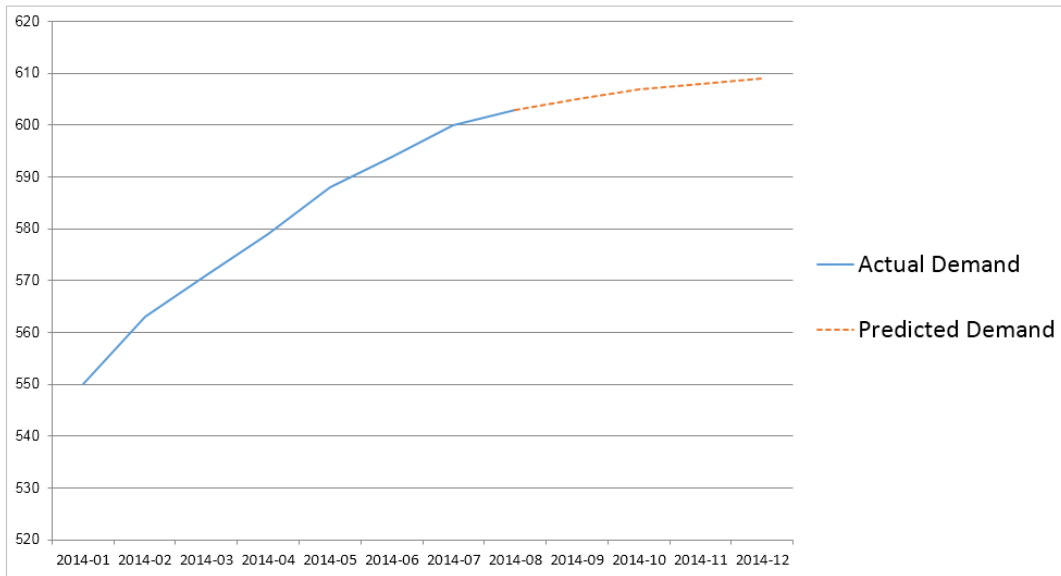
Resource Profile by Project Report

This report shows resources profiles for a specified resource pool, which includes resources roles, skills, hot skills, and location information. It also includes how many projects a resource has participated in and how many years he/she has been working for the project.

As a resource manager, you can leverage this report to quickly view all resource information for the resources you manage.

Parameter description

Parameter	Description
Project Name	Select a project name from the **Project Name** list.

The following is a sample report.

Resource Profile

Project: Wireless Intrusion Prevention (WIP) Implementation

Participation Duration = is the date when a resource joins a project or a resource pool, depend on if the user wants to generate the report for a project or a resource pool

Name	Role	Skills	Hot Skills	Location	Participation Duration	Participated Projects
Dawn Babcock	Developer	Java,Ruby	Java	London	10	20
Richard Balducc	Developer	Java,Ruby	Ruby	New Zealand	13	26
Milo Masson	BI	PL/SQL	PL/SQL	Bei Jing	10	18
Belinda Raman	DBA	Oracle,PL/SQL	Oracle	London	8	16
Edward Neyman	DBA	Oracle	Oracle	Paris	14	24
Geraldine Ciaccia	DBA	Hadoop,Pig	Hadoop	Seattle	12	14
John Hanlon	Developer	C++,C	C++	San Francisco	8	16
Jack Wong	Developer	Object-C,Swift	Object-C	New York	10	18

Resource Profile by Resource Pool Report

This report shows the resource profiles for a specified project, which includes resources roles, skills, hot skills, and location information. This report also includes how many projects a resource has participated in and how many years the resource has been in this resource pool.

As a project manager, you can leverage this report to quickly understand the resource information in your project, which can help you effectively manage the project.

Report Parameters   Restore Default

Resource Pool [   ]

Parameter description

Parameter	Description
Resource pool	Determines which resource pools are represented in the report. From the **Resource Pool Name** list, select the resource pool name.

The following is a sample report.

Resource Profile

Resource Pool: Global

Participation Duration = is the date when a resource joins a project or a resource pool, depend on if the user wants to generate the report for a project or a resource pool

Name	Role	Skills	Hot Skills	Location	Participation Duration	Participated Projects
Dawn Babcock	Developer	Java,Ruby	Java	London	10	20
Richard Balducc	Developer	Java,Ruby	Ruby	New Zealand	13	26
Milo Masson	BI	PL/SQL	PL/SQL	Bei Jing	10	18
Belinda Raman	DBA	Oracle,PL/SQL	Oracle	London	8	16
Edward Neyman	DBA	Oracle	Oracle	Paris	14	24
Geraldine Ciaccia	DBA	Hadoop,Pig	Hadoop	Seattle	12	14
John Hanlon	Developer	C++,C	C++	San Francisco	8	16
Jack Wong	Developer	Object-C,Swift	Object-C	New York	10	18