



Project and Portfolio Management Center

Software Version: Content Pack 5.1

Operational Reporting User Guide

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Chapter 1: Introduction

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

This document provides details about how to use the Excel version of the reports that PPM supplies with Operational Reporting.

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

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

Chapter 2: Using Excel Reports for Operational Reporting

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

The PPM-supplied Excel reports include:

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

Software Requirements

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

- PPM version 9.12 or later
- Operational Reporting Content Pack 4.0 or later

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

- Microsoft Excel® 2007-2013

Configuring to Use Excel Reports on PPM

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

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

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

Administration Guide.


Running Excel Reports


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


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


Demand VS Capacity Report


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


 Report Parameters
[Restore Default](#)


***Begin Period:** 


***Primary Grouping:** 


***Time Unit:** 


Region: 

Resource Category: 

***End Period:** 

***Time Granularity:** 

Resource Pool: 

Role: 

Prompt	Description
* Value Required	
*Primary Grouping	Determines how data are categorized in the report. Select one of the following values: <ul style="list-style-type: none"> • Region • Resource Pool • Role
*Begin Period	Determines the first time period for which data are displayed in the report. Select a value from the Available Periods list.
*End Period	Determines the last time period for which data are displayed in the report. Select a value from the Available Periods list.

Prompt * Value Required	Description
*Time Granularity	Determines the time interval for data displayed in the report. Select one of the following values: <ul style="list-style-type: none"> • Year displays time periods as yyyy • Half Year displays time periods as h1 or h2/yyyy • Quarter displays time periods as quarter/yyyy • Month displays time periods as mm/yyyy • Week displays time periods as mm/dd/yyyy <div style="background-color: #f0f0f0; padding: 5px; margin-top: 10px;"> <p>Note: If you specify a long report period and Week as the time granularity, and you export the generated report data to Microsoft Excel, the data in the resulting Excel file may be truncated as a result of formatting limitations. You can only work around this by exporting the Web intelligence document to a text file, and then opening that file in Excel. File formatting is lost in this case.</p> </div>
*Time Unit	Determines the time unit (FTE, person days, or hours) to use to display capacity and demand data in the report. Select one of the following values: <ul style="list-style-type: none"> • FTE • Person Days • Hours
Resource Pool	Determines which resource pools are represented in the report. From the Resource Pool Name list, select one or more resource pools names.
Region	Determines the region for which data are displayed in the report. Select a value from the Region list.
Role	Determines the roles represented in the report. Select one or more values from the Role Name list.
Resource Category	InfoView lists all of the resource categories defined for resources in PPM. From the Resource Category list, select one or more resource categories to include in the report.

Project Status List Report

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

Report Parameters
[Restore Default](#)

***Primary Grouping:** ▾

Project Name:

Overall Health:

Project Manager:

Region Name:

Request Type:

Project Type:

Business Unit:

Project Class:

Project Status:

Program Name:

Prompt	Description
* Required	
*Primary Grouping	Primary grouping for project information in the report results Selections include: <ul style="list-style-type: none"> Region Projects Class Project Type Business Unit Program
Project Name	Name of the PPM project
Overall Health	Weighted average of the health indicators for scheduling, cost and earned value health, and issue health for a project
Region Name	Name of the region with which the project is associated
Request Type	Project control request type associated with the project. This can be a project issue, risk, or scope change.
Project Type	Entity that determines the business rules used to manage a project. Project types include policies for different aspects of managing the project, including: <ul style="list-style-type: none"> What types of actuals are collected Whether built-in project costing or HP Time Management is used for the project Whether the project includes a work plan
Business Unit	Business unit responsible for the project

Prompt	Description
* Required	
Project Class	Indicates the class to which the project belongs. For example, projects that belong to the Core (Keep the Lights On) project class serve to maintain existing business applications and services.
Project Status	Status of the project in its assigned process
Program Name	Name of the program with which the project is associated
Project Manager	Name of the manager assigned to the project

Financial Summary Report

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

Report Parameters
[Restore Default](#)

***Begin Period:**

***End Period:**

***Multiply Factor:**

***Report Currency:**

Business Objective Name:

Business Unit:

Financial Summary Name:

Financial Summary Type:

Region Name:

Prompt	Description
* Required	
*Begin Period	From the list of all fiscal periods configured for PPM, select the starting period for data to include in the report.
*End Period	From the list of all fiscal periods configured for PPM, select the end period for data to include in the report.
*Multiply Factor	From the listed factors, select one of the following: <ul style="list-style-type: none"> • 1 • 1,000 • 1,000,000

Prompt * Required	Description
*Primary Group By	Determines the primary grouping for data in the report. Select one of the following values: <ul style="list-style-type: none"> • Region • Financial Summary Type • Business Unit • Business Objective
*Report Currency	From the list, select one of the following to determine base the currency associated with financial summary on the default currency for PPM Center (base) or the local currency. <ul style="list-style-type: none"> • Base • Local
*Secondary Group By	Determines the secondary grouping category for data in the report. Select one of the following values: <ul style="list-style-type: none"> • Expense Type • Labor Type
*Time Granularity	Determines the time interval for data displayed in the report. Select one of the following values: <ul style="list-style-type: none"> • Year displays time periods as yyyy • Half Year displays time periods as h1 or h2/yyyy • Quarter displays time periods as quarter/yyyy • Month displays time periods as mm/yyyy • Week displays time periods as mm/dd/yyyy
Business Objective Name	To specify business objectives to include in the report, select the names from the list of business objectives in Financial Management.
Business Unit	To specify business units to include in the report, select the names from the list of business units configured for Financial Management.
Financial Summary Name	To specify financial summaries to include in the report, select the names from the list of financial summaries in Financial Management.

Prompt * Required	Description
Financial Summary Type	To specify financial summary types to include in the report, select one or more of the following from the list of financial summary types: <ul style="list-style-type: none"> • Project • Proposal • Asset • Org_Unit • Program
Region Name	To specify regions to include in the report, select the names from the list of regions configured in PPM.

Time Sheet Compliance Report

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

Report Parameters
Restore Default

*Period Range Beginning Date

*Period Range Ending Date

Time Sheet Line Status(es)

Time Sheet Status(es)

*Tolerance for Approval (days)

*Tolerance for Submission (days)

*Top Org Unit

Request Type Name(s)

Project Name(s)

Location Code(s)

Resource Category

Department(s)

Company(s)

Charge Code Name(s)


Prompt * Value Required	Description
*Period Range Beginning Date	Determines the start date of the date interval for data displayed in the report. If the end date of a period falls between the period range beginning and end dates, then data for that the period are included in the report.

Prompt * Value Required	Description
*Period Range Ending Date	Determines the end date of the date interval for data displayed in the report. If the end date of a period falls between the period range beginning and ending dates, then data for that the period are included in the report.
*Time Sheet Line Status(es)	Determines whether the report displays data for all time sheet lines, regardless of line status, or only for time sheet lines that have a specific status. Select one of the following values: <ul style="list-style-type: none"> • * (default) • Unsubmitted • Submitted • Approved • Rejected • Frozen • Closed
*Time Sheet Status(es)	Determines whether the report displays data for all time sheets, regardless of line status, or only for time sheets that have a specific status. Select one of the following values: <ul style="list-style-type: none"> • * (default) • Unsubmitted • Pending Approval • In Rework • Approved • Frozen • Closed • Missing <p>Note: Although "Missing" is not a valid status for PPM time sheets, in operational reports, it represents time sheets that have no assigned status.</p>

Prompt * Value Required	Description
* Tolerance for Approval (days)	Number of days after the period end date after which the time sheet cannot be approved as compliant.
* Tolerance for Submission (days)	Number of days after the period end date after which the time sheet cannot be submitted as compliant.
* Top Org Unit	Filter report data based on a selected organizational unit. The report returns all of the data that fall below the organizational unit in the hierarchy.
Request Type Name(s)	(Optional) Filters report data based on one or more selected request types.
Project Name(s)	(Optional) Filters report data based on one or more selected projects.
Location Code(s)	(Optional) Filter report data based on one or more selected locations.
Resource Category(s)	(Optional) Filter report data based on one or more selected resource categories.
Department(s)	(Optional) Filter report data based on one or more selected departments.
Company(s)	(Optional) Filter report data based on one or more selected companies.
Charge Code(s)	(Optional) Filter report data based on a selected charge code.

ETL Job History Report


This report displays detailed ETL history information


 Report Parameters


Restore Default

Enter value(s) for Batch Id:

Enter value(s) for Etl Name:

Enter Job Start Date: 

Enter Job End Date: 

Enter value(s) for Status: 

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

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