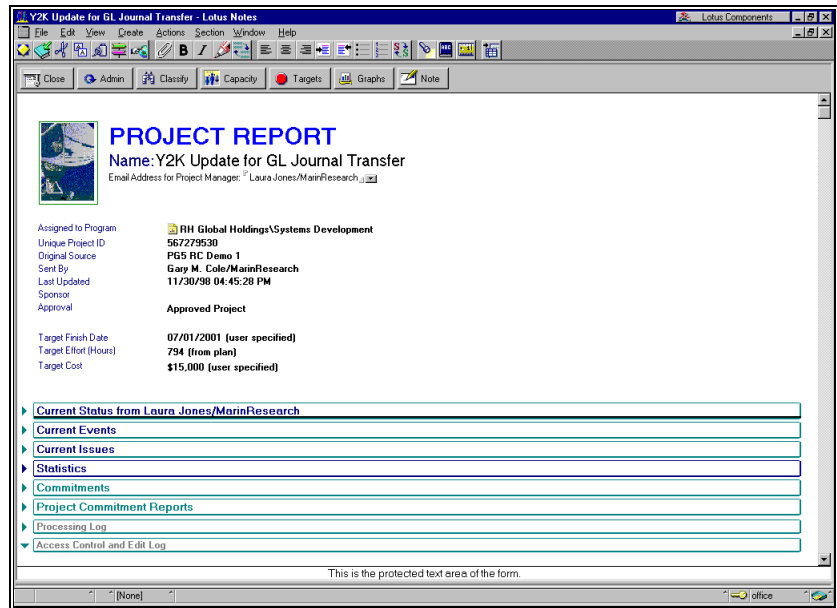


Using a Project Report

The Project Report

The project report is divided into several sections: Heading, Description, Current Status, Documents and Reports, Current Events, Current Issues, Statistics, Commitments, Project Commitment Reports, Processing Log and Access Control.



Heading

Project Name

The Project name is provided by the source. It does not have to be unique in the observatory, but it is more convenient if it is unique.

Email address for project manager

This field may be provide by the source or may be entered by editing the report. This name is used to send automatic messages (like the "your report is overdue" reminder) or user created messages (from the *Note* button)

(Update from Project Source :Yes/No)

This setting is used to override the email address that was part of the project report. If set to yes, then each new project abstract can revise the email address, if set to No, then the email address provided in future project abstracts will be ignored and the one which is currently set will be retained. You use this to after correcting the email address so that it does not change in the future.

Links to Presentations and Briefings.

The line directly below the project manager name will contain links to any Animations recorded for this project and a link that will initiate a Project Briefing. Note, animations require a Real(tm) Player and Project Briefings operate through your web browser.

Program Assignment

This displays a doclink to the program report and the name of that report.

Unique Project ID

This is a number that is assigned by the software that prepares the first project abstract for the project. It must be unique in the observatory. This number is used as a key to access all project related documents.

Project Source

This is the identification of the source of the project. If the project comes from a Project Gateway Repository, this will be the title of the Repository Database. If it comes from an Observatory Reporter database, this will be the identification name defined for that database.

Sent By

This is the "from" address found in the most recent project abstract received by the observatory for this project.

Last Updated Date

This is the "Reporttime" of the last report received about this project. This time is specified by the source to identify the timeliness of the information. This is not the date that the abstract was received.

Sponsor

This is the name of the "sponsor" specified for this project by the source.

Approval

This specifies that the project is in one of the following possible states:

Proposed -project information is provided for review. All work is considered to be proposed.

Approved Until Date - Work prior to specified date is committed, afterwards is considered proposed.

Approved - All work is considered to be committed.

On Hold After - Same as Approved Until.

Canceled - No more planned work.

Finished - No more planned work.

Work that is proposed can be distinguished from committed work on the work graphs.

Target Finish Date: This displays three things. First is the target finish date. Second, in parentheses, is the way in which the target was given which can either be "from plan" or "user specified." Third is the relationship between the project finish date and the target which is displayed in square brackets.

Target Effort (Hours): The first value is the target, the second identifies the way in which the target was specified, and the third is the comparison between the estimated effort at completion and the target.

Target Cost: The first value is the target, the second identifies the way in which the target was specified, and the third is the comparison between the estimated effort at completion and the target.

Targets are specified in one of two ways. They can be provided by the project source (Gateway, Reporter, or MSP) or they can be entered using the Target action. The words "from plan" indicate that the target was transmitted from the reporting system. The words "user specified" indicate that it was entered using the Target action and dialog box. Each of the three targets can be set by either method in any combination.

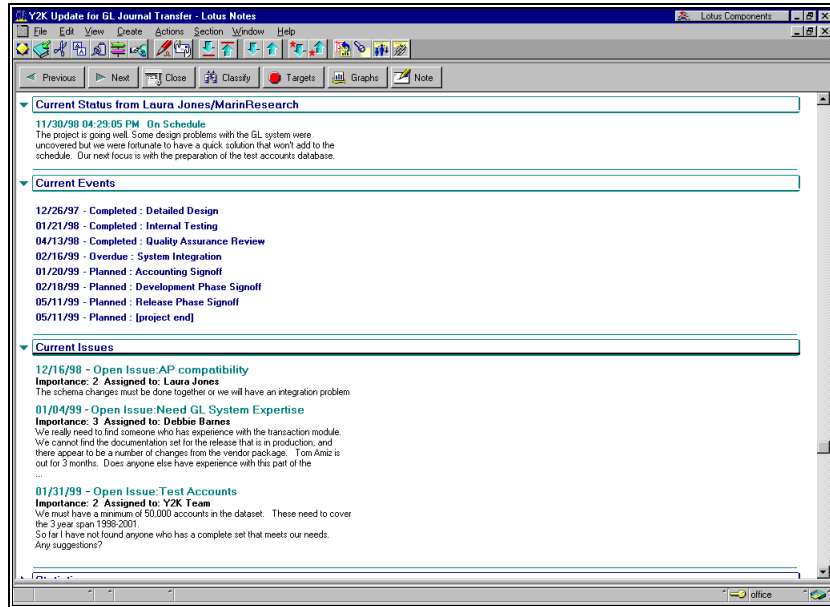
Description

The description shown here will be the one provided as part of the project reporting process. If the source was Gateway, then this will come from the description field on the Project Profile document. If the source was "Reporter" then this will come from the "Description" part of the report form. There is no method provided to transmit a description from the MS project link. If one is needed, a Library document should be created for this project.

Status Report

The status report is a written statement about the condition of the project.

It consists of a short summary phrase ("On schedule") and a longer body of text. The text body is usually condensed from the original. If the project is from a Project Gateway repository, then the status report will be created from the most recent "Project Status Report" on file in the Repository. Otherwise, it will be extracted from the project reporting document or a dialog presented to the project leader at the time the project abstract is prepared.



Documents and Reports

This section contains several items.

External Documents

First will be a list of URLs that link to external documents. If the source of the project is a Project Gateway repository, then there will be link to the Project Profile and a link to each Project Document recorded in the repository.

Library Documents

Next will be a list of all the Library documents associated with this project. These will have the word LIBRARY and a doclink icon if you are using a Notes client, or a hyperlink if using a web browser.

Click Here For Project Issues Report

Click Here for Project Milestone Report

These two reports are discussed in the Chapter entitled "Using Issues and Milestone Reports.

Click Here to Access Historical Versions of this Report

This will produce an index page listing the prior versions of this report in that are available. You can then click on any of them to see the project report as it existed at a prior point in time. This allows you to see information that cannot be graphed such as the status report, open issues, and description.

Current Events

At the top of this section is a line stating how many of the milestones are actually shown. All milestones can be seen by creating a Milestone report.

The Current Events section is a list of some of the milestones in the project. The system chooses up to ten that should be interesting to the reader. This selection process gives priority to those that are overdue and then picks others that would be of current interest.

Each event shows its date, status, and title. The date will be the planned start date for unstarted events, the planned finish date for inprocess events, or the actual finish date of completed events.

In addition to this section, the count of completed and total events is shown in the statistics section and on the dashboards. The trends of completed and total events are also displayed as graphs.

Current Issues

Issues are project problems that must be resolved. Up to 10 issues are displayed for each project and a maximum of 25 are actually stored. Those which are overdue are given priority in this list.

Each issue has a green title line which shows the due date, status, and title of the issue. Below the title is an optional line that shows the importance of the issue on a 1 to 5 scale (1 is most important) and name of the person, if available, to which the issue is assigned. Below this is a short abstract of the body of the issue, limited to 4 lines.

In addition to this section, the count of overdue and open issues is shown in the statistics section and on the dashboards. The trends of overdue and open issues are also displayed as graphs.

The list of issues is updated by each new project abstract. You can see issues in the past history of the project using the Historical Project Reports.

Note that this section shows only those issues reported from the project source. You may also create Library documents in the "Problem" format to document other problems.

All recorded issues are displayed when an Issues Report is produced.

Statistics

	05/12/99 PM	12/06/20 AM	11/30/98 PM	11/30/98 PM	11/05/98 PM	10/29/98 PM	10/05/98 PM	12/30/98 AM
Schedule								
Latest Finish	05/11/99	05/11/99	05/11/99	05/11/99	05/11/99	05/11/99	05/11/99	05/11/99
Work Hours								
Total	803.00	803.00	803.00	803.00	803.00	803.00	803.00	803.00
Actual	370.00	370.00	370.00	370.00	370.00	370.00	370.00	370.00
Actual %	46.08%							
Remaining	433.00	433.00	433.00	433.00	433.00	433.00	433.00	433.00
Overdue	1.00	9.00	9.00	9.00	9.00	9.00	9.00	9.00
Reference	840.00	840.00	840.00	840.00	840.00	840.00	840.00	840.00
Earned	376.48	376.48	376.48	376.48	376.48	376.48	376.48	376.48
Current Hrs								
13wk Plan	117.10	117.10	117.10	109.10	72.73	72.73	72.73	72.73
4wk Actual	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Assignments								
Total	19	19	19	19	19	19	19	19
Finished	10	10	10	10	10	10	10	10
% Done	53%							
In Progress	2							
Overdue	1	1	1	1	1	1	1	1
Key Events								
Total	8							
Finished	3	3	3	3	3	3	3	3
Outputs Expected	6	6	6	6	6	6	6	6
Outputs Delivered	1	1	1	1	1	1	1	1
Cost								
Total								
Actual	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Reference	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

This large table displays current and historical values for a variety of numerical measures of the project (or program) under study. It contains 8 data columns. At the top of each column is the time at which this data was prepared and a doclink to the Historical Report from that time. For a project, this will be the time project abstract was prepared. For a program, this is the time the program data was last recomputed.

The first column shows the current values for each parameter. Each column to the right shows the data from a prior time period. If you don't see anything to the right of the current period, it is because the system has not yet created any history for this project or program. Generally you will see one column for each week into the past, although the time interval may be different at your site.

The statistics table is divided by color bars into sections: Schedule, Workhours, Current Hours, Assignments, Key Events and Costs

Schedule

This shows the latest finish date of any activity in the project or the latest finish of any project in the program.

Work Hours

Total - This is the sum of actual and planned/proposed hours. It is the "Expected Effort At Completion" for the project, and the sum of such values for all projects in a program.

Actual & Actual% - This is the total of actual work hours reported since the beginning of the project. Note, this number should rise over time. The actual % is the ratio of actual to total hours.

Remaining - This is the number of planned or proposed hours included in the total.

Overdue - This the number of planned or proposed hours assigned to weeks prior to the current (calendar) week. Rising numbers here indicate either that the schedule is out of date or the work is not being done.

Reference - This is the number of hours in the baseline plan of the project if the project has a baseline plan.

Earned - This is the number of hours associated with activities in the baseline plan that have been completed. Systems that do not plan at the task level will not report earned hours.

Current Hours

13wk Plan - This is the total number of project work hours planned for the next 13 weeks. It is a moving total that will be updated weekly.

4 wk Act - This is the total number of actual project work hours reported in the previous 4 weeks. It will be updated weekly.

Assignments

An assignment is one resource on one task. This data will be zero if the project is not planned at the task level.

Total - The count of assignments in the project.

Finished and %Done - The number of assignments marked complete and the corresponding percentage of the total. Comparing %Done with Act% and Earned hours can provide confidence when assessing status.

In Progress - The number of assignments that are currently under way (started but not finished.)

Overdue - The number of assignments that should have been started by now, but are not started. Indicates out of date plans, or a late project.

Key Events (Schedule Milestones)

Total - The number of key events planned in the project.

Finished - The number already completed.

Outputs Expected - An output is a general term for a work product, project document, or deliverable being produced as part of the project. This is the total count of such work products.

Outputs Delivered - The number of these that have been produced to date.

Costs

All costs displayed here are the numbers provided in the project abstracts (or total thereof). The user is advised against interpreting these numbers without an understanding of the basis on which they have been derived.

Total - This is the total projected cost at completion for the project or for all projects reporting costs in the program.

Actual - This is the actual cost to date for the project or for all projects reporting actual costs in the program.

Reference - This is the baseline cost.

Commitments

The commitments table appears in all reports. It contains two buttons labeled Details and Totals and three sections separated by color bars labeled Work, Starts, and Finishes

Details: The details button will display "Analysis Period Selector" form and then produce a report showing exactly what resource commitments make up the work in the specified time period. Essentially this allows you to drill down to the source of the work. See the Work Analysis chapter.

Totals: This button will allow you to see the Commitments table for any time period. When you press it, the system displays a new page showing the current commitments. On this page are Past and Future buttons which allow you to scroll back or forward in time.

There are three sets of rows: Work, Starts, Finishes. Many projects will not report starts and finishes, so these sections may be empty.

Only those rows with non-zero values are displayed. The 12 columns show weeks across the top. The display will always show the current week in column 4. So you will be shown the prior three weeks and upcoming 8 weeks. All the data in the commitment table is also available in graphs.

Work

actual - This is the total of actual work hours reported for the selected week.

planned - This is the total of planned and proposed hours reported for the selected week.

reference - This is the total of baseline hours reported for the week.

capacity - This is the intended available of resource hours for each week. It is set using the *Capacity* button on the report form.

Starts

actual - This is a count of the assignments that were marked as started for each week.

planned - This a count of the number of assignments that are planned to start each week.

reference - This is a count of the number of assignments that were planned to start each week in the baseline project plan.

Finishes

actual - This is a count of the assignments that were marked as finished for each week.

planned - This a count of the number of assignments that are planned to finish each week.

reference - This is a count of the number of assignments that were planned to finish each week in the baseline project plan.

Project commitments

This shows one line for each resource commitment on the project. The doclink opens the Project Commitment Report document showing the details of that commitment.

Process Log

This section contains notes created during the processing of the project report. It is intended for the system administrator.

Access Control and Edit Log

At the bottom of the form are the security settings.

Readers - This may be "everyone" or only those allowed to modify the document.

Editors - This will always include the administrator, analysts, and agents (those are specified by role), and anyone designated as a named user.

Named users are selected from the address book or can be manually entered, these can be individuals, groups or roles. The person identified by the email address at the top of the form will be treated as a named user if the email address is a valid user id, otherwise the manager's user id should be entered in this field.

Project Report Actions

Actions available to all users:

Graphs - The user may display the project information using the Java applet by pressing the Graphs button (Notes 4.6.1, Netscape 4.5, IE 4.01 or later.) This will open a dialog box. Several seconds will be required to display the first chart.

Note - The Note button will display a form allowing you to compose a short note to the project manager. The subject line of this note will reference the project report.

Phd - The Phd button will create a Project History Diagram as described later in this chapter.

Document - The Document button will create a new Library document associated with this project. See the chapter on Library documents for more details.

Actions available to users with edit access:

You may setting the email address for this project. By providing this address you are enabling some of the automatic reminders.

Setting Targets

Each project has three targets: FinishDate, Effort, and Cost. The first two of these affect the dashboard views. These can be specified by the source and can be overridden by the observatory user. By default, the source setting are in effect.

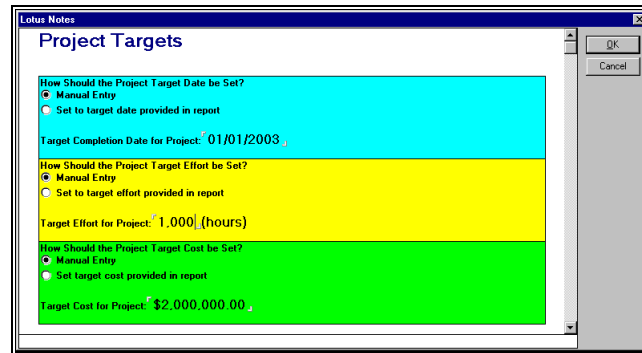
To set targets, Press the Targets button.

In Notes, the Targets dialog box will be displayed. Press OK when done.

In a browser, a Targets form is displayed. Press Submit when done.

Each of the three targets may be in the automatic (project defined) or manual (user defined) state. If you select user defined, then you must enter the target date or value.

Here is an example where manual values have been specified.



The targets that you set are used by the dashboard views and various agents.

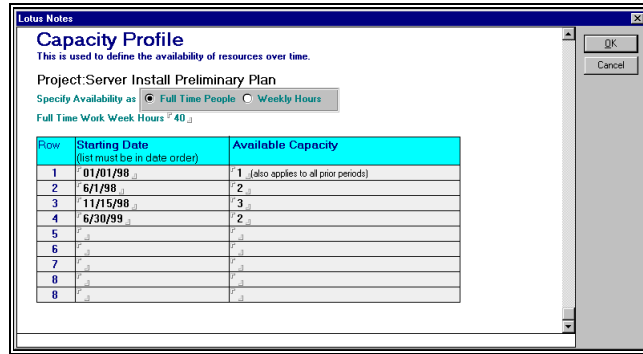
Setting Capacity

Each project may have a capacity defined.

To set capacity, press the Capacity button.

In Notes, the Capacity dialog box will be displayed. Press OK when done.

In a browser, a Capacity form is displayed. Press Submit when done.



The first field designates that capacity will be specified either in hours or in full time equivalent staff.

The second field defines the number of hours in a full time work week. This would usually be 40,37.5 etc.

In the table you enter a starting date on the left, and the number of people or hour on the right. This allows you to define anticipated changes in staffing into the future.

Note: Dates must be entered in sequence.

Both dates and values must be entered for each row if either is entered.

The first entry in the table specifies the value for all time prior to the first date, as well as for the time following the first date. The last entry specifies staffing for all future time.

Therefore, if you simply enter 1/1/98 and 1, you will be telling the system that you have a constant capacity of one person.

If the first and last entries specify a staffing level of 0, then staffing will be assumed to be zero except within the periods defined in the table.

Capacity is really optional for projects and programs, but it does allow the system to recognize overcommitted situations and to produce graphs showing workload vs. capacity.

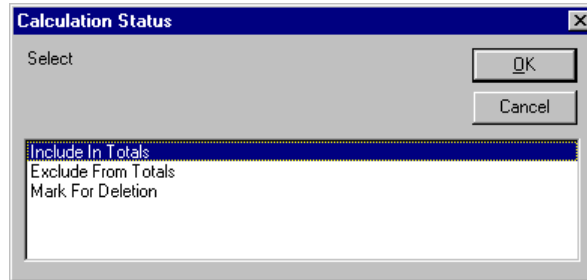
Classify

The classify function is used to categorize projects. See the section on Portfolio management for instructions.

Admin

The Admin function appears on Project Reports. Selecting this function displays the Calculation Status dialog box.

It supports three functions - Include, Exclude, and Mark For Deletion.



When you select "Hide" the project will be removed from the Program and Program w/ Projects dashboard, but will continue to be shown in the Projects by Name and by Manager views (and other places).

More important, the project's contributions will be excluded from the program totals the next time the program is recalculated. This can be used to temporarily remove a project whose report may contain obvious errors (reporting 10,000,000 hours rather than 10,000 for example) from the totals until it can be corrected by the project leader.

When you select "Remove" you are marking the project for deletion from the observatory. The actual deletion will be done by the administrator using the Admin\Delete Marked Reports function.

Note: Removing a project removes its project report, project commitment reports and all historical reports associated with it.