

# Using Work Analysis

---

## What Rolls Up Must Drill Down

Project Observatory uses an elaborate process to create consolidated workload information for individuals, groups and programs. Sometimes, however, you really need to figure out exactly where those workhours came from.

The work analyzer provides the ability to compute the net effort for any Project, Program, or Organization for a time period and decompose the total into the details of its contributing components.

The result of work analysis is a table listing actual and planned work by contributor. Supporting this is a graphic presentation showing the timeseries as well as one or more pie charts showing the distribution of the work.

In addition to simply decomposing the total effort, this process allows you to get results for specific skills that can help in doing resource planning.

**Note:** Because reservations and project commitments are updated on a different schedule than the consolidated program or organization reports, it sometimes happens that you will get different totals from work analysis than from the commitments table. This difference will fix itself when the report is next updated. Work analysis always provides the most recent data.

### The Details Button

Project, Programs, and all Organization entities display a "Details" button in the Commitments section. Pressing Details will initiate work analysis. Although this button is displayed in commitment and reservation reports, it is not active.

### *Notes Operation*

When a work analysis is done using a Notes client, the table of results is displayed and a button is provided to access the graphics. Another action button, labeled "More Details" will allow you to repeat the analysis on any of the selected results. This allows you to "drill down" the data tree. An Undo button will return to the previous layer of results.

## Web Operation

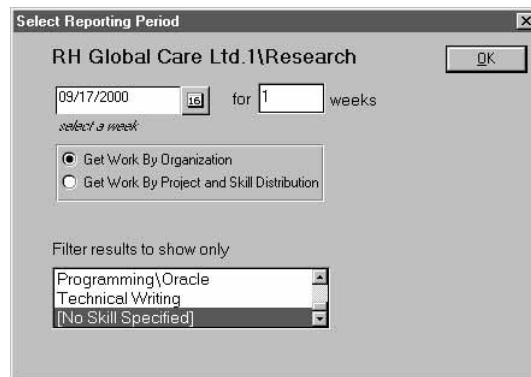
When a work analysis is done using a Web browser, the resulting page will contain the graphic browser preset to show a pie chart distribution of the work. Alternate displays can be selected in the usual manner.

## The Analysis Options Dialog

When analysis is requested, an Analysis Options dialog or page will appear.

Start by selecting a starting week and a number of weeks to define the time period. Since Observatory stores all work data on a week by week basis, there is no provision for more precise time selection. The current week will be selected by default.

When done from an Organization or Member report, this dialog will appear as follows:



This analysis can be constructed either by organization or by contributing project. If you are starting from a Member or an Organization with no children, then you will always get a project breakdown.

Starting from a department level, however, these will generate quite different results. The By Organization option will tabulate the work for each directly associated member (or sub-org). The By Project option will create a list of projects whose work is impacting the organization during the selected time period. It will also generate a pie chart showing the distribution of work by skill for this period.

### ***The Filter Results to Show Only Option.***

To use this option, you must also select "Get Work By Project"

This will allow you to select a skill (at the general or specific level) and return with an analysis showing only the work coded for that skill. The associated graphs will provide a time series bar chart for the work in that skill.

Work Plan Report - Lotus Notes

File Edit View Create Actions Text Window Help

Close Recalc Graphs More Details Undo

### WORK ANALYSIS REPORT

For: RH Global Care Ltd. \Research Health Inc. \Information Systems \San Jose Laboratory  
09/11/2000 - 09/17/2000

| Identification  | Actual Hours | Total Hours   | Percent       |
|---|--------------|---------------|---------------|
|   | <b>0.00</b>  | <b>169.68</b> | <b>100.0%</b> |
| 1 - San Jose Laboratory - Reservation (Service and Support) | 0.0          | 38.5          | 22.7%         |
| 2 - APLEGATE TOM  | 0.0          | 60.0          | 35.4%         |
| 3 - BAKER CARL  | 0.0          | 25.0          | 14.7%         |
| 4 - BARNES DEBBIE   | 0.0          | 40.0          | 23.6%         |
| 5 - BONNER GEORGE   | 0.0          | 0.7           | 0.4%          |
| 6 - DAVIDSON JAMES  | 0.0          | 0.5           | 0.3%          |
| 7 - JACOBS CAROL  | 0.0          | 4.4           | 2.6%          |
| 8 - TRACY ROSE  | 0.0          | 0.7           | 0.4%          |

*Result of a By Organization Analysis*

Work Plan Report - Lotus Notes

File Edit View Create Actions Text Window Help

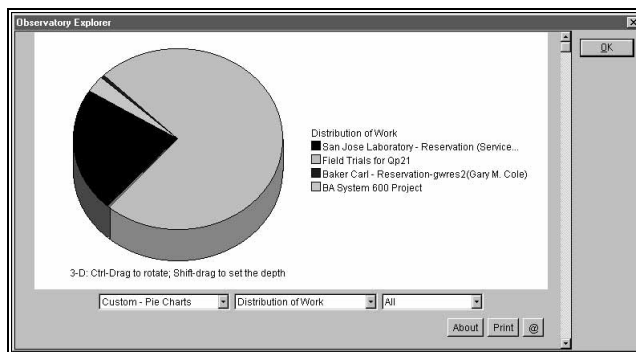
Close Recalc Graphs More Details Undo

### WORK ANALYSIS REPORT

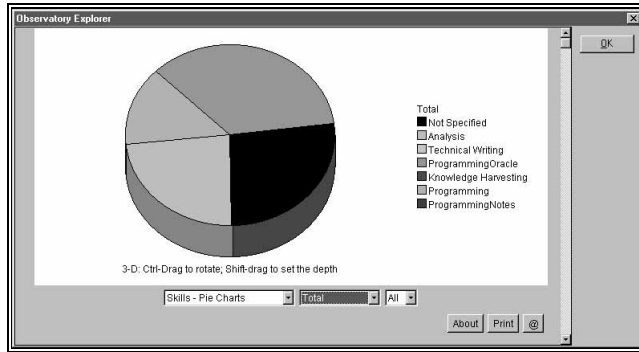
For: RH Global Care Ltd. \Research Health Inc. \Information Systems \San Jose Laboratory  
09/11/2000 - 09/17/2000

| Identification  | Actual Hours | Total Hours   | Percent       |
|---|--------------|---------------|---------------|
|   | <b>0.00</b>  | <b>169.68</b> | <b>100.0%</b> |
| 1 - San Jose Laboratory - Reservation (Service and Support) | 0.0          | 38.5          | 22.7%         |
| 2 - Field Trials for Op21                                   | 0.0          | 124.0         | 73.1%         |
| 3 - Baker Carl - Reservation-gwres2(Gary M. Cole)           | 0.0          | 1.0           | 0.6%          |
| 4 - BA System 600 Project                                   | 0.0          | 5.7           | 3.4%          |
| 5 - System 14 Redesign                                      | 0.0          | 0.5           | 0.3%          |

*Result of a By Project Analysis*



*Distribution by Project*



*Distribution By Skills*

## Project/Program Work Analysis

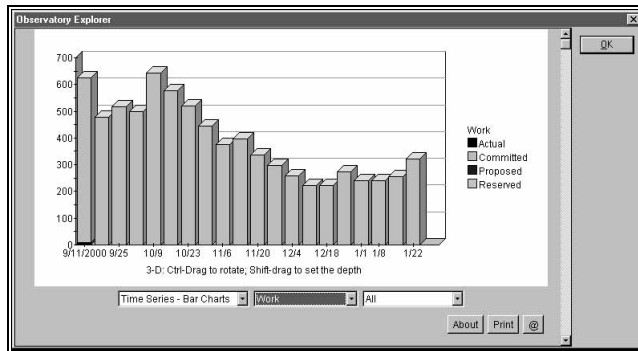
When done from a project or program, this dialog will appear as follows.

## Program Analysis

If you are evaluating a program, then the first option will produce a breakdown showing the subprogram level (if any) and any directly associated projects.

| Identification           | Actual Hours | Total Hours     | Percent       |
|--------------------------|--------------|-----------------|---------------|
|                          | <b>10.00</b> | <b>7,751.88</b> | <b>100.0%</b> |
| 1 - CLINICAL TRIALS      | 8.0          | 680.9           | 8.5%          |
| 2 - PHASE I TRIALS       | 0.0          | 2227.1          | 28.7%         |
| 3 - SAN PAULO LABORATORY | 2.0          | 2956.7          | 38.1%         |
| 4 - SYSTEMS DEVELOPMENT  | 0.0          | 1907.2          | 24.6%         |

*Results of a By SubProgram Analysis*



*Graph showing 20 week work load plan for this program*

If you choose the middle option, the subprograms will be ignored and all contributing projects will be listed. This will not provide skill information, however.

The third option is used to add skill and organization distribution to the results. In order to do this, the analysis has to access all the commitments of every project. This takes much longer to do, so it should be chosen only if you actually are interested these additional details.

### **Project Level Analysis**

All three options produce the same result, a distribution of the project work over the time period by the assigned resources. The pie charts will show this distribution, the skills distribution, and the distribution by the assigned organizational unit (note, the second deepest level organizational unit is used for this purpose since the lowest level is often the individual resource)

The third option should be used, however, if you want to filter the results to show only one skill.

## Portfolio Work Analysis

The preceding have been concerned with analyzing data that was compiled into one of the standing observatory reports.

Portfolio Work Analysis is used to analyze a group of projects selected by common criteria from the database as a whole. For example, you could choose all the projects assigned to a particular manager, or all of the projects done at a particular location.

### Initiating Portfolio Work Analysis

Start from the Portfolio Analysis Navigator and click on the icon labeled Portfolio Work Plan.

If you are using a Notes Client, the following dialog will appear:

Select Chart Options

PORTFOLIO WORK ANALYSIS OPTIONS

Use Ctrl-Click to make multiple selections. Click for single selection. If nothing is selected then all projects are included

Project must be in Program: [ ]

Project must be assigned to Manager: [ ]

Project must be at Location: [ ]

Project must be in Scenario: [ ]

Project status must be: [ ]

Filter results to show only: [No Skill Specified]

REPORTING PERIOD

Starting From: 09/17/2000 for 1 weeks

Get Skill and Organization Distribution

<SIZE=3>

Notes project selection dialog

If you are using a Web Browser the following page will appear.

PORTFOLIO WORK ANALYSIS OPTIONS

Use Ctrl-Click to make multiple selections. Click for single selection. If nothing is selected then all projects are included

Project must be in Program: Intent Productions Movies  
Intent Productions Movies(Content Management)

Project must be assigned to Manager: blanuis  
Debbie Barnes

Project must be at Location: CANADA  
CANADA(PEI)

Project must be in Scenario: I.Full Funding  
II.Continuity

Project status must be: Approved  
ApprovedUntil

Filter results to show only: [No Skill Specified]

REPORTING PERIOD

Starting From: Sep 23 2000 for 1 weeks

Get Skill and Organization Distribution

Submit

Web project selection dialog

## Portfolio Selection Options

*Projects must be in Program (select up to 4)*

A list is provided showing all of the programs. You can select from 1 to 4 of these as search criteria. Note, if you select a high level program, then it makes no sense to also select a subprogram of that program because its projects will already meet the higher level condition.

***Projects must be assigned to Manager (select up to 4)***

A list is provides showing all of the Project manager names used in the database. You may select from 1 to 4.

***Projects must be at Location (select up to 4)***

A list is provided showing all defined locations (from the customization list) Note: This may include locations that have no projects assigned. Select from 1 to 4. Only projects at these locations will be included.

***Projects must be in Scenario (select up to 4)***

A list of the standard Scenarios is provided. Check those to be included.

***Project status must be (select any)***

A list of the standard project approval types is provided, check those to be included. If none are checked, then status will not be a selection criteria.

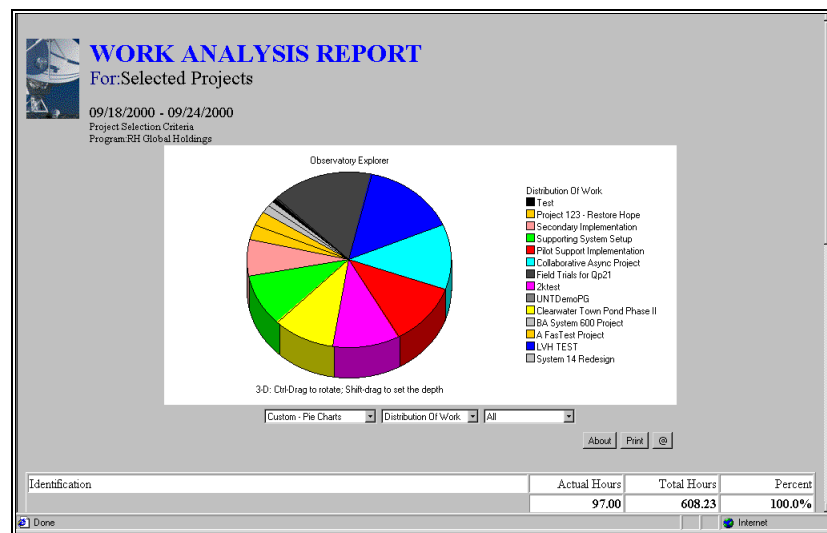
***Filter Results to show only (select one from list)***

This allows you to limit the results to work of a specific skill.

***Get Skill and Organizational breakdown checkbox***

You must select this option if skill filtering is desired.

**Results of Portfolio Analysis**



*Result of Portfolio Work Analysis shown in a Web Browser. Table of contributors begins at the bottom of the page.*

The system will return a table showing the work breakdown. If you are using a browser, graphs will appear at the top of the page. If you are

using a Notes client, the graphs will appear only when an action button is pressed.

Web results are hyperlinked to the underlying report and with links entitled "More Details" These links will restart the work analysis to decompose this entity.

Note that project commitments and reservations cannot be further decomposed.

### **Performance Considerations**

If none of the first 4 selection options are selected, the system will evaluate all projects in the database. This can take quite a while.

If the Get Skill option is checked, then all the commitments of each project have to be accessed. This is not necessary unless you are interested in the skill or organization details.