Using Organization and Commitment Reports

Overview

Managing a collection of resources is done using Organization Reports, which summarize supply, demand, status, and skill data at the department level, with Member Reports, which focus on a single person, and with Project Commitment Reports which track how a particular resource is involved with a particular project.

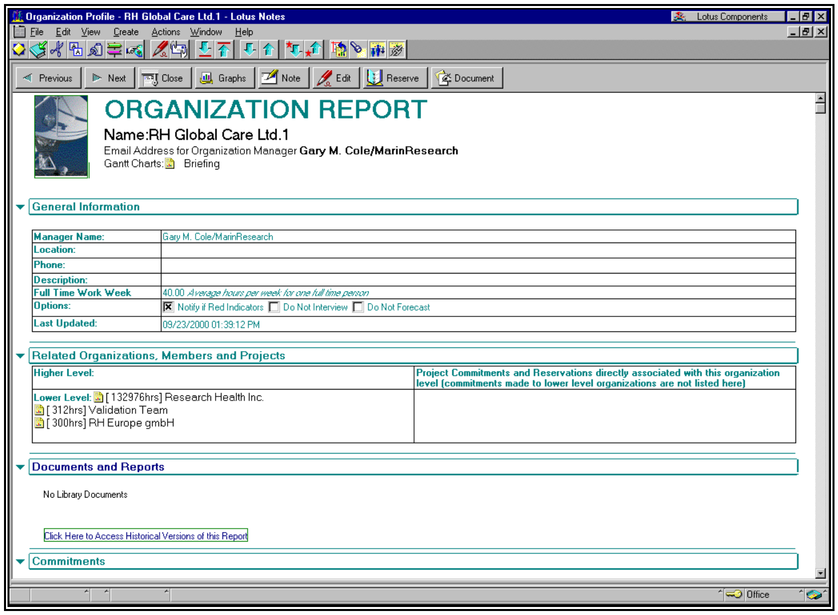
Organization and Member reports must be created by the administrator (although the process can be automated when used with a Project Gateway Repository). Project Commitments are created as part of the project reporting process and associated with specific Members or Organizations by the administrator.

Like the Project and Program reports discussed in prior chapters, these reports contain both current and historical information for trend analysis as well as library documentation support.

They are also supported by the briefing facility which provides an easy way to walkthrough the status of any member or group.

Organization and Member Reports

These two reports are identical in layout. They consist of a Heading followed by collapsible sections labeled General Information, Related Organizations, Members & Projects, Documents and Reports, Commitments, Statistics, Capabilities and Access Control sections.



Heading

Organization Name: The name a program is displayed in its full hierarchical form.

Note that the name of an organization consists of its given name attached to its parent's name. In the dashboard views, the last part of the name is shown with indenting to reflect the relationships. In the report itself, the full name is always used.

Email address: This address will be used to send messages. Messages are generated when dashboard targets are exceeded, when forecasts are issued, when reservations are made, and for other reasons. The person named here should be the person who wants to receive these notifications. They will also be given edit rights to the document. We call this the "Manager" since that will usually be the case, but another Manager name field is provided within the General Information section in case someone else needs to be identified with this organization.

Presentation and Briefing Links:

If Gantt Charts or Animations have been created, then links to these will appear followed by a link to initiate a Organization or Member Briefing.

The second table in the general information section provides a place to record background information about the organization or member.

General Information

Manager Name - This may be different from that used in the email address.

Location - This is a place to define the locale of the organization team. It is specified by selecting a named location from the locations list defined by the administrator.

Phone - Enter phone and pager numbers for organization

Description - Enter an explanation of the organization and its objectives, leadership structure, etc.

Full Time Work Week - This is the "standard week" for this organization. This is used when defining capacity. Typical value would be 40 hours.

You should use the Capacity action to set the proper availability as a function of time.

Notification -

Check the ***Red Indicators*** option to have the observatory send an email when any of the color indicators transition to red or worse as a result of recalculation.

Check the ***Do not Interview*** option to prevent the observatory from sending a capabilities interview.

Check the ***Do not Forecast*** option to prevent the observatory from forecasting this organization.

Last Updated - This is the time the data in this report was calculated. No project updates since this time have been included. This is normally within the past 24 hours.

Related Organizations Members and Projects

The upper left part of this table contains links to the parent organization. The lower left side provides links to the sub-organizations and members. The right side lists the project commitments assigned directly to this organization. The links to Project Commitments exist because the observatory administrator has instructed the system to attach these particular commitments to this particular organization.

It is always possible that the administrator could have made a mistake in the assignment process, so you should look at these links to ensure that they really belong to this organization or member. The links to project commitments show the resource names used by the project leaders (or source repositories) so don't be surprised to see a commitment for "bill" attached to an Organization Member named William!

Documents and Reports

This section contains several items.

Library Documents

There 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 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 report as it existed at a prior point in time.

Commitments

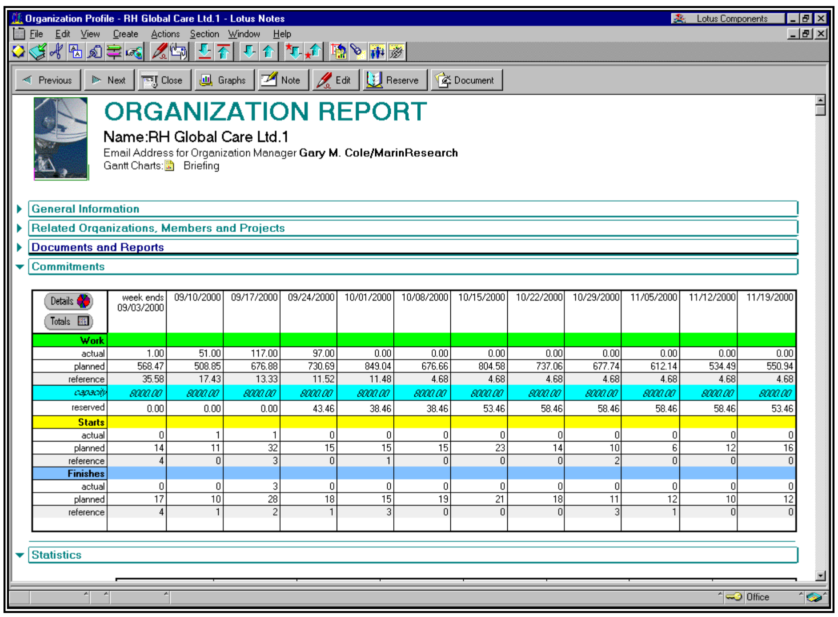
The commitments table appears in all reports. It contains two buttons labeled Details and Totals and three sections separated by color bars labeled Work, Starts, and Finishes

Details: The details button will display "Analysis Period Selector" form and then produce a **Work Analysis Report** showing exactly what resource commitments and reservation make up the work in the specified time period. Essentially this allows you to drill down to the source of the work for period of weeks. You can also select the work details for a specific skill.

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.

The commitments table shown here is in the same format as that shown in all other reports. The values shown for capacity are set for this particular organization. The other values shown are the total of all project commitments and suborganizations.

The commitments table contains three sections separated by color bars. Only those rows with non-zero values are displayed. The 12 columns across the top show weeks. 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 available in graphs.



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

Work

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

planned - This is the total of planned, reserved 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 staff hours for each week.   It is set in the observatory using the ***Capacity*** button on the report form

reserved - This is the workload associated with reservations on this organization, it's sub-organization and members as of the date when the report was last updated. Newer reservations will be found whenever an availability analysis is done. Note that reserved work amount is incorporated into the planned work value.

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

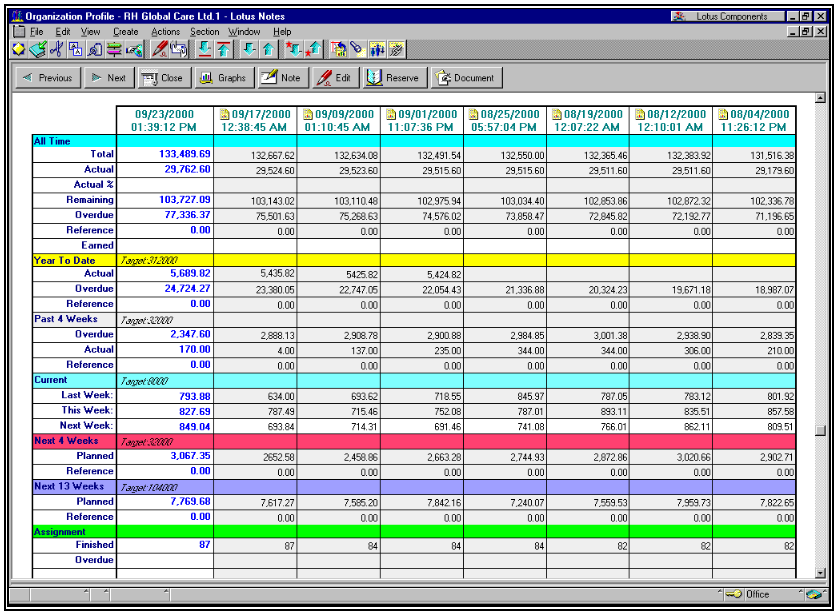
actual - This is a count of the assignments that were marked as finished for each week.

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.

Statistics

The statistics table shown for Organizations, Members and Project Commitments differs from that shown for Projects and Programs.



	09/23/2000 01:39:12 PM	09/17/2000 12:38:45 AM	09/09/2000 01:10:45 AM	09/01/2000 11:07:36 PM	08/25/2000 05:57:04 PM	08/19/2000 12:07:22 AM	08/12/2000 12:10:01 AM	08/04/2000 11:26:12 PM
All Time								
Total	133,489.69	132,667.62	132,634.08	132,491.54	132,550.00	132,365.46	132,383.92	131,516.38
Actual	29,762.60	29,524.60	29,523.60	29,515.60	29,515.60	29,511.60	29,511.60	29,179.60
Actual %								
Remaining	103,727.09	103,143.02	103,110.48	102,975.94	103,034.40	102,853.86	102,872.32	102,336.78
Overdue	77,336.37	75,501.63	75,268.63	74,576.02	73,858.47	72,845.82	72,192.77	71,196.65
Reference	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Earned								
Year To Date	Target:312000							
Actual	5,689.82	5,435.82	5425.82	5,424.82				
Overdue	24,724.27	23,380.05	22,747.05	22,054.43	21,336.88	20,324.23	19,671.18	18,987.07
Reference	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Past 4 Weeks	Target:32000							
Overdue	2,347.60	2,888.13	2,908.78	2,900.88	2,984.85	3,001.38	2,938.90	2,839.35
Actual	170.00	4.00	137.00	235.00	344.00	344.00	306.00	210.00
Reference	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Current	Target:8000							
Last Week:	793.88	634.00	693.62	718.55	845.97	787.05	783.12	801.92
This Week:	827.69	787.49	715.46	752.08	787.01	893.11	835.51	857.58
Next Week:	849.04	693.84	714.31	691.46	741.08	766.01	862.11	809.51
Next 4 Weeks	Target:32000							
Planned	3,067.35	2652.58	2,458.86	2,663.28	2,744.93	2,872.86	3,020.66	2,902.71
Reference	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Next 13 Weeks	Target:104000							
Planned	7,769.68	7,617.27	7,585.20	7,842.16	7,240.07	7,559.53	7,959.73	7,822.65
Reference	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Assignment								
Finished	87	87	84	84	84	82	82	82
Overdue								

All Time

Total - This is the sum of actual and planned/proposed hours. It is the "Expected Effort At Completion" for the project commitment, and the sum of such values for all commitments of an organization.

Actual and Actual % - This is the total of actual work hours reported since the beginning of the project commitment or of all the project commitments of an organization. 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 associated project commitments if they have baseline plans.

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.

Year To Date

Target - This is the capacity of the organization from the start of the current year to the current week. If capacity has not been specified, then this number will not appear.

Actual - This is the number of actual hours reported since the beginning of the current year.

Overdue - This is the number of work hours still scheduled to be done since the start of the current year up to but not including the current week.

Reference - This is the number of work hours planned to for the period starting at the beginning of the current year through the current week.

Past 4 Weeks

Target - This is the capacity of the organization for the 4 weeks preceding the current week. If capacity has not been specified, then this number will not appear.

Overdue - This is the number of work hours still scheduled to be done in the 4 week period prior to the current week.

Actual - This is the number of actual work hours reported in the 4 week period prior to the current week.

Reference - This is the number of work hours planned reported in the 4 week period prior to the current week.

Current

Target - This is the capacity of the organization for the current week. If capacity has not been specified, then this number will not appear.

Last Week - This is the total number of planned and actual work hours in the week prior to the current week.

This Week - This is the total number of planned and actual work hours in the current week.

Next Week - This is the total number of planned work hours for the week following the current week.

Next 4 Weeks

Target - This is the sum of the capacity of the organization for the next four weeks not including the current week. If capacity has not been specified, then this number will not appear.

Planned - This is the sum of the planned work hours for the next four weeks.

Reference - This is the sum of the baseline work hours for the next four weeks.

Next 13 Weeks

Target - This is the sum of the capacity of the organization for the next thirteen weeks not including the current week. If capacity has not been specified, then this number will not appear.

Planned - This is the sum of the planned work hours for the next thirteen weeks.

Reference - This is the sum of the baseline work hours for the next thirteen weeks.

Assignments

Finished - This is the total number of assignments that have been finished by this organization or project commitments.

Overdue - This is the total number of assignments that are scheduled in the past for this project commitment or organization.

Capabilities

This section lists those specific capabilities associated with this organization. This information is normally derived by the Capabilities Interview process.

Last Interview Date

The first line will show the date of the most recent interview. This is followed by two lists of capability names.

Capabilities List

The first is list of capabilities. When edited, the entire list will be shown, when viewed for reading by a web client, only the selected items will appear. This list is used both in the availability search and skills analysis process.

This list is updated in three ways. One, you can manually edit it. Two, whenever the manager completes a Capabilities Interview questionnaire, the results will be used to update this list. Three, whenever a commitment is made that is associated with a skill, then the system will infer the skill onto the assigned Member or Organization. Commitments are usually skill assigned by the Project Interview process.

Capabilities Requested List

The second list is of the capabilities that this person has requested the opportunity to acquire. This is used in the availability search process to help find appropriate candidates when training can be provided. This list can be manually entered, but is normally maintained using the results of the Capability Interview questionnaire. This contents of this list is not affected by the commitments of the organization.

Note: All of the capability names are members of the list of custom capabilities defined by the administrator. Until this list is created, no capabilities can exist in any Organization or Member Report.

[Click Here for Skills Analysis]

This will create as Skills Analysis Report for this organization. See the chapter of that name.

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 list 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. Named users can be individuals, groups or roles. If the email address is a valid user id, then that person will be a named user and will have edit access rights.

Organization Report Actions

Actions available to all users

***Note* -** The Note button will display a form allowing you to compose a short note to the organization manager (or member). The subject line of this note will reference the organization report.

***Graphs* -** The user may display the organization information using the Java based applet by pressing the Graphs button. This will open a dialog box. Several seconds will be required to display the first chart.

***Document* -** The Document button will create a new Library document associated with this organization or member. See the chapter on Library documents for more details. Common uses of this are to maintain weekly status reports and organization charters.

***Reserve* -** This allows the user to create a reservation for this person or group.

The Reserve dialog also provides a related feature called **Check Availability**. Check Availability will return with the amount of time that is remains available in a specific period as well as a detailed list of existing commitments for that time. See the discussion on Reservations below.

Actions available to users with edit access to the report

Capacity

The capacity action allows you to specify the staffing level available at each point in time.

Identification

The identification action is used to change the name of the organization or its position in the hierarchy. This should only be used with the consent of the observatory administrator. This function is discussed in the Administration Guide.

Resource Reservations

A Reservation is a special kind of future commitment that can be made against and Organization or Member.

Reservations define a timerange, effort level, and a purpose. They are used to primarily to pre-allocate resources to upcoming projects, but have other uses as well such as preallocating resources for maintenance obligations and blocking off time for professional gatherings or extended travel. (Note that adjusting capacity is also a practical tool for vacation blocking)

Reservations go though a five phase lifecyle:

Creation

Approval

Integration

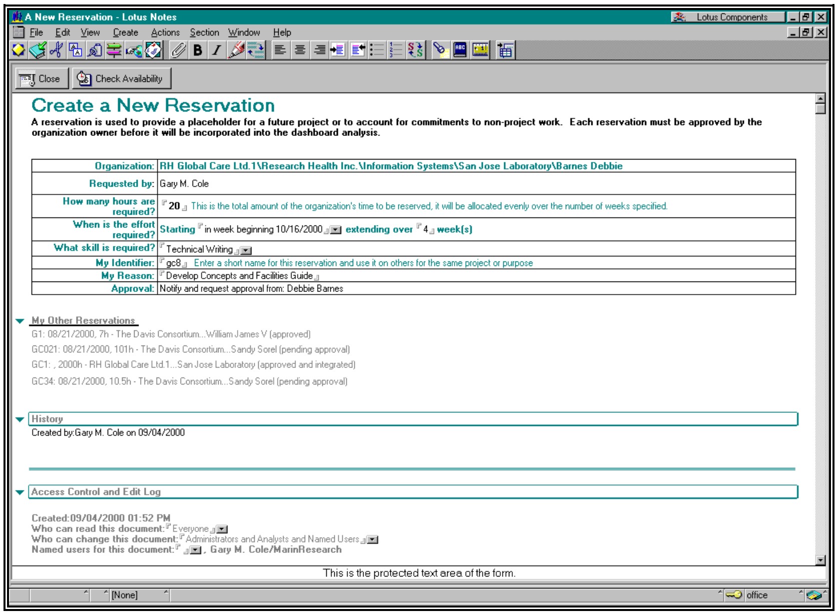
Evaporation

Expiration or Cancellation

Creating a Reservation

A reservation is created using the Reserve action from the Organization Report, or the Reserve button on the Availability Search Form, or one of the **RESERVE** links on a Web Availability Search Results page.

This will display the Create a New Reservation Form.



Create a New Reservation, Notes Client.

Organization: This is preloaded with the name of the organization which is being reserved.

Requested by: This is preloaded with the name of the user making the request.

How many hours are required: This the total time being reserved, for planning purposes it is assumed to be equally divided over the specified weeks.

When it the effort required? This will be the week when the time should be made available. Only dates into the future are allowed.

extending over [...]weeks. This is the number of weeks over which the total work will spread.

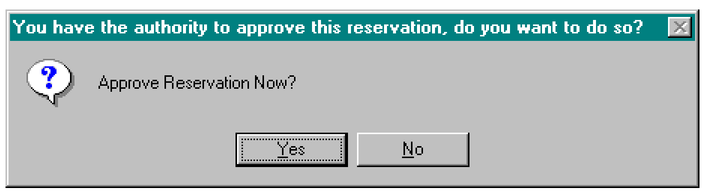
What skill is required? This will allow you to select a skill for this reservation to help the approver understand the kind of work to be done. This will also code the reserved work so that it is properly classified for other analysis. This information is particularly important for large requests extending over long periods where resource reallocation may be anticipated.

My Identifier. This is a place for a simple alphanumeric code that you should create to mark this request. If you are making several reservations for a single project, then use the same code for each so that the can be listed together in the analysis views.

My Reason: This is the place where you explain why this is needed to the approver. This text will become the description of the reservation.

Approval: All request must be approved, but, depending on who you are, you may have the power to approve. Normally the reservation requires the approval of the manager of the organization.

Notes Client: If you can approve, then, when you close the reservation, you will be presented with a dialog box giving you the opportunity to do so.



Web Client: If you can approve, then the option to do so will be in the droplist in the Approval section as [Self Approve]. This will be in addition to the option "Request Approval from....".

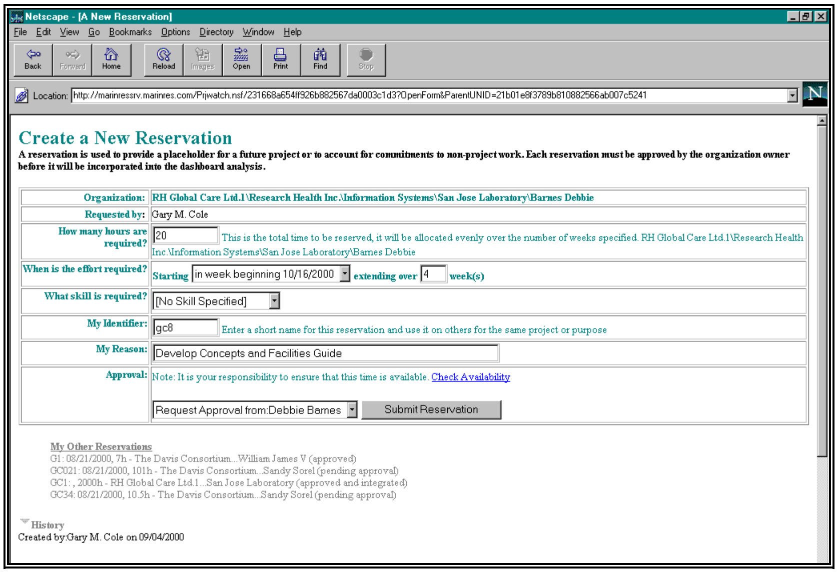
Check Availability: This action, which appears as an action button on the Notes form and as a hyperlink in the approval block of the web form, will allow you to verify that the requested time is actually available. When this is done from a Notes client, a dialog box will appear showing the capacity, usage and available hours with a list of concurrent commitments for the time period that is specified in the form. When this is done from the web, the "Check Availability" form will be displayed. It will show today's date. You must select the time period and effort and them press submit. It will return with a page listing the available time and details of the usage.

My Other Reservations

This table will list other reservations made under your User ID. This is convenient when making a group of reservations because you can see the others.

History

This section will compile a log of actions made during the life of this reservation.



Creating a New Reservation, Browser.

Approving a Reservation

A new reservation that is not approved by the requester is called a Pending Reservation.

When a Pending Reservation is created, an email is sent to the manager of the organization (using the email address found in the Organization Report header.) This email contains a link to the reservation.

The person receiving the email is expected to use the link to open the Pending Reservation form and review the request. On this form appear Approval Cancel, and Delete actions.

Approve will mark the reservation as approved and the system will proceed to integration. Cancel will mark the reservation as canceled and nothing further will be done. Delete will remove the reservation.

When you cancel a reservation, you are prompted to provide a reason which will be logged as part of the reservation history.

If a Pending reservation is not approved or canceled it will continue as pending. Pending reservations will show up during availability searches as work for the resource, but will not be shown in the commitments tables.

Integration

After a resource is approved, it will be marked as an Approved Reservation" and will integrated into the Organization Report during the next recalculation.

As an integrated reservation, it will show in the Commitments, Statistics and in the Related... section. It's workplan will contribute to the planned workload and hence the dashboard status. It will be used in the forecasting process and may trigger the issuance of a demand forecast.

Integration is done when the Organization Report is updated. In most cases this will occur overnight. So a Reservation which is approved today will appear in the dashboard data tomorrow. When integration is complete the reservation will be marked as Approved and Integrated.

Locating Reservations

All reservations are listed in two views provided on the Analysis navigator.

Reservations by Requester

Reservations by Organization

In addition, all of the integrated reservations will be listed in the right hand side of the Related Organizations, Members & Commitments section of the Organization Report.

Reservations will also be listed in all Work Analysis reports.

Associating Projects with Approved Reservations

When one or more projects is attached to a reservation, the reservation will be reduced on a week by week basis by the amount of work planned for the sum of the attached projects in the same weeks. If the project work is greater in a particular week than the original reservation, the effect will be to reduce the reservation to zero for that week. If the projects plan less work than the reservation, then the reservation will be reduced to an amount which makes up the difference.

This adjustment process is redone once each week. This allows a reservation to co-exist with the project(s) that it was created for.

Example: You reserve 10 hours/week for the next six months for maintenance work. Various projects would fall into that category but the individual projects would be only a few weeks in length. By associating the projects with the reservation you avoid double counting the labor, and maintain a demand for the resource into the future to anticipate projects not yet defined.

To associate a project:

The **AssociateAProject** action on the Reservation form will display a picklist of projects, or a project selection transaction form. Once projects have been attached, a **RemoveProjectAssociations** action will appear to allow you to remove them.

Note: Do not delete projects which are attached to reservations. If you do, an error will show on the reservation indicating that the project is not found.

Evaporation

All reserved time is future time, you cannot reserve time in the past.

As the time period of the reservation passes, the remaining effort on the reservation will decrease. This process is called Evaporation and a message appears within the Reservation showing the amount of time removed.

The reservation is updated at the beginning of each week. At the same time, the project adjustments are computed so that the reservation contains the right amount of remaining workhours.

Expiration

When the last week of the reserved time period has passed, then system automatically expires the reservation. At this time it sends an email to the original requester telling them that the reservation has expired and deletes the reservation from the database. The system does not retain any record of expired reservations except for Historical Organization Reports which will contain the names of the integrated ones at the time they were saved.

Reservation Recap

A reservation is created to identify a future need for a resource. The reservation will be approved and integrated into the Organization work plan. When projects are created, they can be attached to the reservation to consume some or all of its reserved effort. As time passes, the work will evaporate. The reservation will eventually expire if it is not canceled first.

Project Commitment Reports

Project Commitment Reports are logically associated with a particular project and are assigned to an organization. They do not support briefings (although they are used when preparing briefings of the associated entities). You can, however, generate an animation for a commitment. While you can set the work capacity for a commitment (to reflect a budgetary constraint for example), in most cases capacity will not be defined here, but will be set in the associated member or organization.

The report contains a Heading, Documents and Reports, Commitments, Statistics, and Access Control sections.

Heading

Resource Name - This is the resource name used by the project leader who provides the information. This may be different from the name used for the same person or group in the observatory for several reasons.

One reason is simply that of different spelling. Project plans are built for the team using them so they often abbreviate names.

Another reason is that resources will be reported for individuals, but aggregated to departments in the observatory, so the resource names may not directly correspond to an Organization or Member Report title.

The resource name includes the names of any hierarchy defined at the source of the project report. If you are getting the reports from Project Gateway Repositories, you will see the Repository organization structure as part of the resource name.

Project ID - This is the numeric identifier used for this project.

Link - This is a doclink with the name of the project.

Approval - This is the current state of the project.

- **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.

Current Organizational Assignment

This displays a doclink to the organization or member in which the data in this commitment report has been incorporated. This link is created during recalculation.

Needs Review

This checkbox is used by the administrator to designate commitments that may need to be assigned or reassigned.

Skill Or Role Assignment

This shows the skill or role code associated with this commitment. It can be set by the skills action button on the report form. But the normal way that this is set is using a Project Interview questionnaire. This allows the project leader to conveniently set the most appropriate skill for all of the resources used on that project in one place, rather than having to edit multiple commitment reports.

Documents and Reports

The displays a list of library documents and provides access to the list of historical reports for this commitment (if any are maintained).

Commitments

The commitments table is in the same format as that used for Organization Reports. Note that the details button is disabled because a commitment report is the lowest level of work information and all that can be displayed is available using the Graphs action.

Statistics

The statistics table is in the same format as that used in Organization Reports.

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 list will always include the administrator, analysts, and agents (those are specified by role), the person who is set as the manager, and anyone designated as a named user.

Named users are selected from the address book or can be manually entered. Named users can be individuals, groups or roles.

Project Commitment Actions

Actions available to all users

***Graphs* -** The user may display the organization information using the Java based browser by pressing the Graphs button. 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 organization manager (or member). The subject line of this note will reference the organization report.

Actions available to users with edit access to the report

Capacity

The capacity action allows you to specify the person-hours or staffing level available at each point in time. If you specify capacity on a commitment, then dashboard balls will appear for that row. Otherwise, the dashboard indicators will not appear for commitments.

Assign, AssignToGroup, and AssignToMember

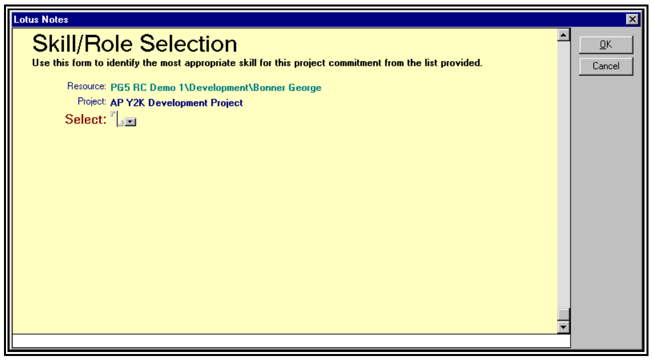
These action is used by the administrator to assign a single project commitment to a specific organization.

Skill

The skill selection action appears only on Project Commitment Reports. It displays a skill selection dialog box that allows you to identify the skill area that best represents the work of this commitment.

A list of available skills is provided. This list is created by the observatory administrator.

As noted above, the normal way in which skills get assigned to commitments is through the Project Interview Questionnaire process.

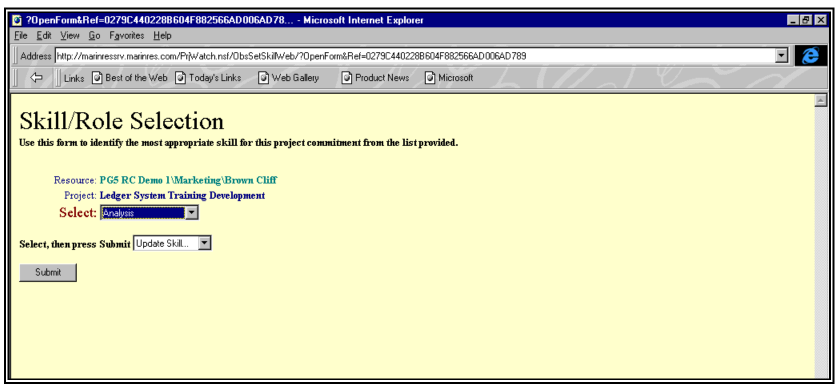


In Notes, to set the skill for a commitment:

Press the Skill button, select the skill from the drop list, and press OK.

From a browser:

Press the Skill button to display a skill selection page. Select the skill, select "Update Skill" and Submit.



By assigning skills, you create opportunity for organization, project and program managers to view the distribution of labor by skill in graphic form. This in turn can lead to better staffing decisions.