What's New In
Project Gateway® 5.1

August 2001
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1.1 Introduction

Project Gateway 5.1, which will be released during the fall of 2001, is a significant release which provides dozens of new and extended features for its existing users and a richer project management environment for new users.

Project Gateway has a long history since its initial introduction in June of 1994. Many of the design elements and ideas have come from our wonderful customer community. We want to offer special thanks to the Cap Gemini Center for Excellence for contributing the core design for the scope change facility and to the Project Methods group at IBM Global Services for all their help and patience in the development of Microsoft Project 2000 integration.

The full Project Gateway 5.1 release will contain updated versions of the Repository, Metrics, Costing, Archive, Work Request, Wireless Portal, Enterprise TimePortal, Project Gateway Tools for Notes Clients, and Project Web Publisher and documentation.

This document details only the changes made to the Repository Database.

In this document, we have grouped the improvements in a way that we think will most easily understood by existing users. This is not a description of all the system features, but rather a statement of the new features and changes to existing behavior.

Most of the development work has been additive. Existing users upgrading to the new design from an out of the box 5.04 design should have few if any difficulties and will find a very familiar envrionment. Obviously, sites with modified designs may require some care for reintegration, but we have not changed anything that we thought might have a major impact on existing databases.

1.2 The New Scope Change facility of PG5.1

Unfortunately, the goals of most projects are revised during their lifetimes. The more widespread the changes, the more likely it is that the project team and it's customer will have conflicts. Scope Change management is a tool to provide a process so that changes that affect the project results will be understood and their impact agreed to by all parties. It also provides a permanent record of these decisions. This is of particular importance in consulting organizations and in internal service groups that bill back to the line organizations.

The core of this feature is the Scope Change Document. This document serves both as a request for a change as well as a record of its investigation and the history and details of its approval (or other disposition). Scope Changes can be initiated from the new scope change navigator or directly from a project profile. Eight views were added to organize scope changes by project, classification etc.

Scope change documents have the following elements

- Description including title, status, project association, classification, priority, full description, alternatives, recommendations of the requester, impact statement, and resolution statement.

- Optional assignment of an investigator, impact statement of from investigator, and recommendations from Investigator.

- Estimated cost, effort and schedule impact on the project due to this change.

- Records of actual time spent on assignments associated with the scope change, including its investigation.

- Details of who approved/rejected the change.

Scope change documents can have responses so that all members of the project team can contribute to evaluations. They also have selectable security like other documents so that their visibility can be restricted on a need to know basis.

1.2.1 The Scope Change Investigation Process.

Investigation is not absolutely required, but would normally be done for all but the most trivial changes. When an investigator is assigned, they are immediately notified as to their responsibility by email. A convenient action is provided to create a regular work assignment for the investigation. When this is done, the assignment will be logically linked to the scope change and the hours spent on that assignment will be logged against the scope change and added to a scope change actual work total for the project. More than one person can be assigned if necessary.

The investigator is responsible for estimating the cost, labor, and schedule impact of the change and recording these into the scope document. When the investigation is done, the scope change document may begin the approval process.

1.2.2 The Scope Change Approval Process.

Scope approval is a process of sending notification to each of a list of approvers who can accept, abstain or reject the change. The list of approvers is controlled by a combination of factors which involve the policy settings of the affected project. The requester does not define the approvers, although the requester can add additional approvers to the list that would otherwise be created.

The project policy can define from one to three levels of approval. Approvers defined at level one must approval all scope change requests. If the request meets certain thresholds defined in the project policy (in terms of cost, effort, schedule delay or category), additional approvers will be invoked.

Here is a typical approval policy scenario:

a) All Requests require the approval of the Project Manager and the Original Requester (who might reconsider after the results of the investigation are available.)

b) Escalation Rule 1 - Requests which will delay the project by more than 5 days, or which are classified as "Functionality" changes require the additional approval of the 5 members of the project council.

c) Escalation Rule 2 - Requests which will require more than 100 additional workhours will require the approval of the Program manager.

This policy is set for the project. All scope changes for that project will automatically invoke the rules to determine the set of required approvers. Different projects can have different rules.

When a Scope Change is offered for approval, emails are sent (either in series or parallel per the project policy) to the required approvers with links to the document. They signify their acceptance, abstention or rejection by using an Approval action and dialog box. Only the specific individuals whose input is solicited can actually contribute to the process.

If the approval process does not complete within a preset policy period, the project manager will be notified that the approval process has stalled and can then work with a system administrator to override it.

The Scope approval process provides an administrative override that can be used to correct the approval record (if someone changes their mind) and to cancel or expedite the process. In every case, the details are retained in the document so that there is no question of who approved what.

1.2.3 Scope Change Reporting.

In addition to the set of predefined views, the system provides very flexible HTML format reports showing Scope Changes for individual projects, program, or individuals. These reports provide extensive grouping and sorting controls and can be customized and stored for reuse.

Project Scope Change Statistics. The system tabulates the number of open and closed scope changes for each project and the actual and remaining work hours associated with them.

1.3 How we improved System Administration in PG 5.1

The Reports Navigator now contains a one-click item to open the Administration (Field Map) Form. This avoids the need to open the all documents view and search for the Field Map document.

The Administration form has a function called "AgentStatusReport". The Agent Status Report provides a listing of all agents in the database. It provides the scheduling, the time of the last run, the owner and server name for each agent.

When used from the Notes client, the AgentStatusReport provides two additional actions - "Enable Agents" and "Disable Agents." These can only be used by people with Manager level access. They turn on or off all the scheduled agents in the database. This really saves time and avoids a lot of clicking and selecting when setting up the system.

We have provided table based customization for all of the following selections. This eliminates the need to modify form designs to insert your own codes. All of the following are included. We have provided defaults for all of these options that should meet the needs of many organizations.

- Issue and Risk Classification Codes
- Issue and Risk Priority Codes
- Open and Close subtypes for Issues and Risks (you can now have several variations of Open and Closed status)
- Scope Change Classification Codes
- Scope Change Priority Codes
- Status Summary types available on Project and Participant Status Report forms.
- Special Billing Codes available on Charge Slips.
- Project Document Classification Codes
- Project Lifecycle Stage Codes

We have provided table based setup for extending the list of Project Documents to add user defined formats. This eliminates the need to modify code in navigators and selection forms. Adding a new project document format to the system now can be done in as little as five minutes.

The database is now preconfigured with the connection to a Project Observatory system. The only action required is to enter the Observatory name and transfer method into the administration form. This eliminates the need to modify the Repository Design when installing an Observatory. If you are, inexplicably, not running Observatory, please contact sales@marinres.com for a free evaluation copy.

There is now a new function which automates the change of a project name. This automatically updates all relevant documents in the database with the new name.

There is now a new automated method for changing participant names which integrates with the synchronization process and can track multiple name revisions for a person.

The system now switches Workload forecast and Time Summary views automatically at each half year. This eliminates the "cut and paste" design switchover that has been previously required at the end of each year, and provides better time analysis. This is especially important for sites with multiple repositories.

The web implementation now incorporates a site logo graphic on the home page. This is set using a "Set Log" action on the Administration form which is restricted to people with PGADMIN rights

The News system was rewritten to eliminate the time-dependent view. News is now automatically incorporated in to Web Calendar Reports.

1.4 How we improved Issues and Risks in PG 5.1

Issue and Risks are now shown in separate views and composed with separate buttons but you can still convert an Issue into a Risk and vise versa.

You can now move an issue or risk from one project to another at any time.

Issues and Risks show up on the Calendars of Project and Programs, Participants and Organizations. These calendar reports can be selected to show either open or resolved items.

A project leader can choose to be immediately notified when a new issue or risk is recorded for their project.

The author of an issue or risk may choose to be automatically notified whenever anyone posts a response to that topic. This can speed up the process for short cycle problems.

Issues and Risks are now assigned a unique tracking number so they can be located by number as well as by name, author, category etc.

The issue form has been enhanced with new description elements including a place to formally document the resolution of .the problem.

The issue classification code is now selected from a site customizable list of such codes to improve the consistency of data. For example, if you are running software development projects, you can defined a "Defect" classification, and use the issues facility to track defect resolution for each project and program.

The issue priority is now selected from a named list rather than a numeric scale. The names are customizable for the repository.

When you create an issue or risk from a project or assignment, the project name is preset in the document.

When you create an assignment from an Issue or Risk, then assignment's work hours are tabulated against that item and also totaled for the project. This allows you to better understand where the project's labor is really going.

When you create an assignment from an Issue or an Issue/Risk from an assignment, the system records the association and provides a link to allow you open the related documents from each other. This is implemented for both Notes and Web clients

There is now a HTML ink inside the form that shows a report detailing the issue and all of its responses.

Issues and Risks can be logically linked to any number of projects.

When an Issue/Risk is submitted, there is a link to the appropriate view which will open the view at the start of the project.

1.5 How we improved Project Documentation in PG 5.1

There are now 4 basic forms of Project Documents included in the design.

- Standard Form - used for any kind of material
- Meeting Minutes Form - for keeping formal records of key project meetings, design reviews, etc.
- Project Charter Form - a place for the definition of the project goals, non-goals, team definition etc.
- Milestone Definition Form - a place for the formal definition of milestones and gates.

Adding new project document form designs to the system is now easy because the list of document forms is now kept in the Administration form rather than buried in the navigator code.

There is now an "approval" function for the project document where by the project manager can formally accept the finished work.

Project Documents now support versioning for both Notes and Web users. Versioning was previously available only for Notes users and there was no way to prevent the creation of new versions.   Now it is available at the option of the writer whether using a Notes client or a browser. When an older version of a document is opened, it displays a version date message. When an older version is opened, a new option, "Promote" is provided. The Promote will take the version and convert it to a new primary document which may then be subsequently versioned.

When a primary document is opened, a link is displayed which will produce an HTML report showing a summary of the base document and all prior versions including dates and authors.

Project Documents may now be classified according to a site customizable classification coding (which may be different if desired, from the classification codes that used for issues and those used for scope changes)

When a project document is created from a Project Profile or Assignment, the project name and optional document tracking code is preset.

You can now move a Project document to another project at any time.

Project Documents that are logically required by assignments, but which do not exist or are not final, will be reported on the project calendar.

1.6 How we improved Status Reporting in PG 5.1

We now have both Project Status Reports and Participant Status Reports available.

Status reports are more complete. They now include sections for reporting Activities and Accomplishments, Planned for Next Week, Problems & Concerns, as well as a general commentary area and file attachment option.

Participant Status Reports can be associated with a specific project if desired. Participants can file multiple reports for the same period if that is desired.

The "situation" codes available to project leaders and participants are no longer fixed but can be site customized using the administration form.

The Project Status Reports View shows both Project Reports and Participant Reports marked for that project. This makes is very easy for the project leader to see all relevant reports quickly.

When a Participant submits a Web Timesheet, they are prompted to see if they would like to create a participant status report.

1.7 How we have improved the Timesheet Process in PG 5.1

While the Timesheet form is virtually unchanged from the previous release, there are major enhancements in the overall Timesheet process which provide more convenience to the participant, and more control to the project leadership.

1.7.1 Timesheet Creation

There is a new "My Timesheet" action located on the web home page, the Timesheet Navigator and the participant profile. The My Timesheet action will first determine your participant name using your login id. If you have an open Timesheet for the current week, it will reopen it for you. If you do not have a Timesheet, it will create one for you. If you already have an approved Timesheet for the current week, it will give you the option to create one for the next week. Using this function, you can update timesheets on a daily basis much more easily than every before and users will not need to use the Timesheet views to find their "in progress" reports.

Administrators and others who need to create timesheets for third parties will find a convenient "Create a timesheet for another" function on the Timesheet navigator. This provides the same intelligent access function but lets you select the participant. Of course, the security mechanisms will stop you from creating a Timesheet for someone if you have not been given the right to do so.

1.7.2 Timesheet Correction

A Web Timesheet correction process is now included. In version 5.04 we introduced a straightforward method of correcting existing posted timesheets for Notes clients. In this release we add Web support for this function. With the prior approval of an administrator, a user may adjust hours spent on reported tasks, add additional open or finished tasks or add overhead categories to existing timesheets. Immediate changes will be made to the affected assignments, and the Timesheet will be automatically processed for costing.

1.7.3 Timesheet Task Selection.

When a Timesheet is created, a list of assignments is created for that Timesheet. We have enhanced this list production process by incorporating project approval, a lookahead date, and individual assignment control.

- Using the new Project Approval information. When a project is approved, assignments to that project are candidates for reporting. When a project is specfied as "proposed", none of the assignments will ever appear on a Timesheet. When a project is marked as "On Hold", "Canceled" or "Finished", the system will limit the assignment selection depending upon the period for which the Timesheet is reporting and the effective date of the status change. For example, if the project goes on hold as of August 1, timesheets that are for periods beginning prior to August 1 will contain assignments for that project, but timesheets created for periods after August 1 will not. This allows all the actual work on the project to be reported up to the point at which the project was stopped.

- Both Notes and Web timesheets now limit task selection to a time window into the future (specified by the administrator) so that users are not overwhelmed with future tasks that have no current relevance.

- Finally, we now have a checkbox option on the assignment form that allows you to exclude that specific task from timesheets. This feature was implemented at several customer sites and proved useful.

1.7.4 Timesheet Date Export.

We have a new reporting function that exports Timesheet data to spreadsheets, databases, or HTML tables.

1.7.5 Timesheet Variance Monitoring

When participants are shared by multiple projects, it is always a concern that their time reporting is satisfactory to all concerned managers. To help project leaders maintain accountability, Project Gateway now provides an automatic Timesheet monitoring function. This function analyses each Timesheet at the instant that it is submitted by the participant. For each task for which time is reported, the change in actual and forecasted hours is determined and compared with limits preset by the project leader of that particular project. If there are tasks with variances from the plan which exceed these limits, a detailed report is compiled and emailed to that project leader. This gives the project leader a chance to discuss the Timesheet with the participant while there is still time to change it before it is posted against the project.

1.7.6 Virtual Timesheet Posting

This is a new feature that complements the normal Timesheet process. In your Timesheet, you update the tasks which you spent time on. After this is done the Virtual Timesheet Posting process updates all of the other tasks that you were scheduled to spent time on, but did not actually work on for the same week. Essentially it updates tasks with "Not this week" information.

- For tasks that are started but not yet finished, the virtual Timesheet agent records a zero effort for the week. When this task is synchronized to a system that makes use of weekly actuals (MSP 2000 and PMW) the zero values provide the information needed to determine the transition from actual to planned work. The result is that the planning tools can correctly reforecast the unfinished work for all in progress tasks without have to make assumptions about as of dates.

- For tasks not yet started but which should have been started based upon the planned start date, the process adjusts the assignments so that the workload forecast analysis will allocate the overdue work as future work. The planned tasks dates are not changed in the database, and they will still appear in the list of overdue tasks, but they are interpreted as if they would be started in the near future to provide a more intuitive sense of pending commitments. In previous versions of Project Gateway, overdue unstarted tasks showed planned work in the past, which is technically correct, but not as useful as seeing the same backlog overdue work loaded into the near future.

1.7.7 Revised Timesheet Navigator and Views

The Timesheet by person view now shows the costing date, so you can easily see which timesheets have been sent to the Costing Center database.

1.7.8 Enterprise TimePortal Connection

This release supports the Project Gateway Enterprise TimePortal. The portal allows a user to create a single timesheet that which will report on tasks in any number of repository databases. A special status for portal timesheet initiation is provided for portal users.

1.8 How we have improved Project Operations in PG5.1

1.8.1 New Project Calendar Report.

This presentation (for Notes clients and Web Browsers) provides a comprehensive view of project activities for a month. This shows the due dates of milestones, tasks, issues, risks, scope changes, and deliverables, plus the holidays of project participants, and any current schedule events you have defined for this project and any project documents that are missing, unfinished or need your approval. You can choose to show items to do, or items done. The latter is very useful when compiling progress reports.

1.8.2 Extensive New Reporting. See the section on Reporting.

1.8.3 Scheduled Events Recording

We have provide a way to record schedule events (such as Design Reviews) for the project so that they will appear on the calendars of all participants and supervisory programs as well as on the calendar of the project itself.

1.8.4 Project Profile Improvements

We have redesigned the Project Profile document to make it easier to use. The various names used have been grouped at the top of the form. There is now a provision for entering multiple phone numbers for the project leader. There is also a convenient and comprehensive way to change the project name.

1.8.4.1 Project Approval.

We have added an important new project parameter we call Project Approval. Project Approval has six possible states for the project: *Proposed*, *Approved, Approved only up to a future date*, *On Hold*, *Finished* and *Canceled*. The Project Approval setting affects the operation of timesheets, automatic reminders, and reporting functions for that project.

- Projects can be set as "approved until" which means that the project will run normally until the preset date, at which time it will be automatically set to on hold. All work planned after the preset date will be treated as proposed rather than committed.

- Projects can be set to either a finished and canceled status which will also prevent additional work from being reported after the termination date.

- When a project is not approved, neither the project leader nor any participants will be reminded about about upcoming, late or late finish assignments.

- When a project is not approved, no document tracking reminders are sent to the project leader about missing documents.

- When project is not approved, when users create timesheets, they can report on work done before the "hold date" but not after. Timesheets created after the hold date will not contain any of the project's tasks.

- When any one of the weekly workplan reports is run (AskPG functions) the work that is scheduled after the hold date is marked as proposed and color coded.

- When the project is reported to Observatory, the approval status will be reported.

1.8.4.2 Project Lifecycle.

We have added a new option to set the Project Lifecycle attribute for a project to one of a set of customizable predefined values.

1.8.4.3 New Project Statistics.

Scope Changes open/overdue/closed, hours spent/planned on scope changes, hours spent/planned on issue resolution.

1.8.5 New Project Policy Controls.

We have consolidated some previous options and added many new options to create a section called Project Policy that defines all the following functions

1.8.5.1 Whether or not to send assignments reminders about this project.

1.8.5.2 Whether or not to allow people to create new assignments on this project.

Note that the project manager can always create assignments.

1.8.5.3 Whether or not to immediately notify the project manager when a new Issue, Risk or Scope Change is recorded for the project.

This can speed up the process in a time critical project.

1.8.5.4 Timesheet Monitoring Policy

An option to have the system monitor all timesheets which are submitted that record hours for this project. The option allows the project leader to set limits as to the number of hours that the user may add or remove from assignments (and hence the project totals). When those limits are exceeded the system will send the project manager an immediate email detailing exactly what has been submitted. This notification will occur prior to approval and prior to posting so that the project leader can contact the Timesheet submitter or approver and get the data corrected before it becomes part of the project record. This is very useful in budget constrained customer projects where any change in estimates or overrun might require customer approval. It also provides the project manager with very detailed oversight how project effort is being reported before it affects dashboard status.

1.8.5.5 Scope Approval Process Policy

- This defines a set of policy rules for the approval of scope changes made on that project. When a scope change is offered for approval, the system constructs a list of approvers based upon the policy setting for that project. The policy setting provide for a basic set of approvers for all requests. Then there are two additional sets of rules which allow the escalation of the approval for changes with sizable impact or for those which are of particular types.

- For example, one of these rules could be set to require the program manager to approve any change which is expected to impact the budget by more than $5,000. Or one of the rules could be set to require the signoff of the Quality Manager for any change that impacts functionality or customer satisfaction, but not for other changes. The purpose of the policy settings is to create a consistent layered approval process for all scope changes that does not depend upon the requester or demand the continual attention of the project leader.

- The approval process can be set as parallel or serial. When parallel approval is used, all approvers are notified at the same time. When serial approval is used, the completion of one signoff triggers the request for the next.

1.8.6 Project related view changes

- The Performance by Project and Performance by Participant views now show assignment work, reference work, date and reference dates in addition to variances. This makes the interpretation of the changes much more intuitive.

- The Outline w/hours now includes status data and shows work remaining rather than planned work. This allows it to be compared directly to project scheduler totals and Project statistics.

1.9 How we have improved Project Assignments In PG5.1

- When you create a new assignment, either using the Notes Client or the Web Browser, you can select any number of participants to be assigned to it. This makes it easy to assign several people to a task. The same applies when an assignment is created from an Issue, Risk, or Scope Change.

- When you create a new assignment, you have a checkbox option to immediately notify the people of their new work. This can eliminate the need to "call and remind" people about new work that needs to be done right away.

- Assignments now have an option that can be set to prevent them from showing on timesheets. This prevents Timesheet clutter when many support projects are left open for reporting, but rarely worked on.

- Assignments now have an option to signal whether or not the work is capitalizable. This flag may be exported as part of the Timesheet export data for analysis purposes. Note that we don't try to determine the capitalizability of particular work so using this flag will require the advice of your corporate finance group.

- Assignments which are associated with projects that are not currently in an approved state will display a message when opened. They will not appear on timesheets that are for periods after the work termination date.

- You can now create Issues and Project Document directly from assignments and they will remain linked.

- You can now create assignments for coworkers from the browser as well as the Notes Client.

- The status of an "in progress" assignment will now be shown as "LATE" if the scheduled finish date is in the past. In all previous versions, in progress assignments were shown as "OK" no matter how late they actually were.

- The Future and Overdue assignment views on the Assignments Navigator have been changed so that they are no longer time dependent views. This means that they will be displayed much faster.

- Assignments that were manually created can now be deleted by the project manager when using a browser.

1.10 How we have improved Participant Planning in PG5.1

- There is now a new function to allow the entry of participant holidays. These schedule events will be shown on the appropriate calendar reports. These holidays are not (yet) exported to scheduling tools, but do provide a way for the project leader to see the true availability of the team.

- There is a new Participant Calendar Report which shows assignments, issues and other responsibilites plus schedule events for all of that persons projects.

- There is now a set of web formatted, week based workload reports for projects, programs, organizations and individuals in addition to the monthly workload forecast views and weekly time summary views.

- We now provide an easy way for each participant to record holidays and other periods of non-availability so that project and organization leaders can quickly see possible problems. These holiday periods are displayed on the appropriate project, program, and departmental calendar reports and also in the week level workload tabulations.

- Through the use of the Virtual Timesheet Posting function we update assignments with a report of zero work. This information is used in the Workload forecast views to allocate the overdue work into future periods. Note that the schedule dates in the assignments are not adjusted. Only the project leader can really "fix" an impossible project schedule, but the system will show the likely implications of overdue work in terms of department loading.

- We have redesigned the Participant Profile for easier setup.

- We have redesigned the Participant List View with more sorting options.

1.11 How we have improved Deliverables in PG5.1

- Deliverables can now be owned by projects.

- Deliverables can now be moved freely within the deliverable tree. This preserves the subdeliverable structure and all linkages. The move action is supported for both Notes and Web Clients.

- We added a "deliverables by project" view.

- There is a new Deliverables report that can be generated for any project, program or individual. Deliverables with due dates will appear on project, program, and individual calendars.

1.12 How we improved Discussions in PG5.1

- The discussions by topic view was redesigned to list topics by creation date, with optional sorting by title.

- We added a new web report, My Discusions, which shows the discussions that you have authored or marked as favorites.

- The discussion document, when opened from a browser, shows a link to a report which shows the topic and all of its responses.

- When a reponse documents is submitted using a browser, a link is provided to return to the parent document.

1.13 How we have improved the appearance of PG5.1

- Redesigned web homepage with integrated custom site logo and report access. This page now loads in about half the time of the previous version.

- New web "My Responsibilities" page

- Redesigned navigators for easier operation, less clutter. Web navigators now are displayed with a panel of selections for all navigators. This allows you to go from one naviagator to another without using the home page.

- Redesigned web online guide page integrating internal and external links

- Redesigned web repository locator

- New header on web views with create document and navigator links

- New footer on web views with direct links to all navigators, online guide, home, project and program reports.

- New visual legend on the web project dashboard

- New close and edit buttons wherever appropriate

- Redesigned project profile and participant profile documents

- New reports access panel in all profile documents (Notes and Web)

1.14 How we have improved reporting in PG 5.1

- We have created an extensive set of reporting agents which will create HTML tabular reports in a great variety of formats. These agents execute on the Domino server, so they have very fast access to the repository data and don't depend upon network performance. These reporting functions execute in real time so you get absolutely up to the minute information.

- When one of these reports is requested by a Notes client, a browser window is opened to display the results.

- When the repository is accessed from a browser, each profile document will display a table listing the available reports. When the same profile is opened from the Notes Client, a "select Report" button appears which provides a droplist of reports.

1.14.1 General Reports

- Project Synopsis

- Project Staffing Plan (weekly workplan by resource)

- Project Current Assignments (listing by resource)

- Project Overdue Assignments (listing by resource)

- Participant Summary (weekly workplan by project)
- Organization Status (weekly workplan by participant)
- Issues/Risks Report for Project, Program, Individual. These provides filtering, grouping, selection, sorting and 5 levels of detail and spreadsheet export
- Scope Change Report for Project, Program, Individual. These provide filtering, grouping, selection, sorting and 5 levels of detail and both list and matrix formats and spreadsheet export
- Deliverables Report for Project, Program, Individual
- Documents Report for Project, Program, Individual
- Document Tracking Report (methodology support) for Project, Program
- InterProject Dependencies Report for Project, Program
- Recent Assignments Report for Projects
- Recent Documents Report for Projects (Issues, Risks, Scope Changes, Project Documents)
- Status Reports Report for Projects, Programs, Participants, Organizations
- Timesheet Reporting/Export - filter by time, project, participant, Timesheet status, export with user codes
- Export Issues/Risks/Scope Changed to spreadsheet
- Export Timesheet data to spreadsheet
- To-do calendars (note and web clients) for projects, participants, programs, organizations

1.14.2 MY REPORTS - a collection of user reports that are immediately available on the repository homepage.

- My Projects Report - A dashboard of projects which I manage.
- My Discussions Report for shows topics that I have authored, my favorite topics, and recent new topics plus links to responses.
- My Work Report shows my current task assignments

- My Issues Report shows issues and risks that I have authored and those that have been assigned to me
- My Documents Report shows project document I have authored.
- My Deliverables Report shows deliverables that I own.