Using Web Based Reports & Query

Overview

Project Gateway provides a large number of tabular reports generated in HTML format for display using browsers.

These reports can be initiated by a Notes Client User if the database is web enabled and if the Notes Client has a web browser configured.

Generating Reports

When any project, program, participant, or organization report is opened for viewing, a section labeled "Reports" will appear.

In a web browser, this will display as a two or three column table listing all the predefined reports. Simply click on the desired heading to generate the report.

In a Notes client, you will see an action button. Clicking this button will provide a dialog letting you select a report. This action will tell the server to generate the report and return a web page to you.

Normally your Notes client will be configured with a default browser, which will open to show the report. You may have to pass a login challenge to open the page.

Report generation time is dependent upon the size of the database, the kind of material being gathered, the horsepower of the server, and other concurrent activity. Normally the server will only try to execute one of these report processes at a time, so if several people request reports simultaneously, there will be queuing delays. Typical reports will take from 2-30 seconds if there is no contention for resources.

Common Elements in Reports

Heading

The heading will identify the subject of the report

Body Table

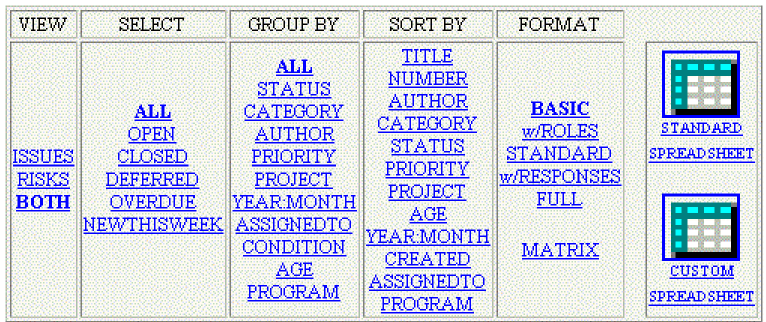
The body consists of one or more tables.

Each table has a heading row with the names of the columns in bold caps.

Control Panel for Issues, Risks & Scope Change Reports

These reports contain a gray block at the end that provides options for the report. Each item in this control table is hyperlinked to regenerate the current report with the revised option. The Current options settings are shown in each part of the table in bold.

The control panel is divided into columnar sections, some of which only appear in specific contexts.



VIEW	SELECT	GROUP BY	SORT BY	FORMAT	
ISSUES RISKS **BOTH**	**ALL** OPEN CLOSED DEFERRED OVERDUE NEWTHISWEEK	**ALL** STATUS CATEGORY AUTHOR PRIORITY PROJECT YEAR:MONTH ASSIGNEDTO CONDITION AGE PROGRAM	TITLE NUMBER AUTHOR CATEGORY STATUS PRIORITY PROJECT AGE YEAR:MONTH CREATED ASSIGNEDTO PROGRAM	**BASIC** w/ROLES STANDARD w/RESPONSES FULL MATRIX	STANDARD SPREADSHEET CUSTOM SPREADSHEET

There are slight variations between the Issue and Scope controls that are noted below.

View (Not shown on Scope)

This will provide the choice of showing Issues, Risks or Both.

Select

This will limit the items to those which meet the highlighted condition ALL, OPEN, CLOSED, DEFERRED, OVERDUE, NEWTHISWEEK (created within past 7 days)

Group By (ROW in Matrix format)

This will cause the system to divide the body in to sections based upon the selected factor:

ALL (default), STATUS (Open, etc.) CATEGORY (from your custom list), AUTHOR (user name of original author), PRIORITY (from your custom list), PROJECT (title), YEAR:MONTH (creates a heading such as 2001:06 for June 2001 issues), ASSIGNEDTO or INVESTIGATOR (user name), CONDITION (Open, Overdue, etc.), AGE (days since creation), PROGRAM (name of program associated with the project if any).

For scope change reports APPROVER also provided.

Sort By (COLUMN in Matrix format)

This will cause the system to order the items in each group in alphabetical or numeric order (or reverse)

TITLE, NUMBER (assigned document number), AUTHOR (username), CATEGORY(from your list), STATUS (from your list), PRIORITY (from your list), PROJECT (name), AGE (days since creation), YEAR:MONTH (as described above), CREATED (creation date), ASSIGNEDTO or INVESTIGATOR(username), PROGRAM (name)

For scope change reports APPROVER, DATE, COST, WORK are also provided.

Format

There are two fundamental layouts, tabular and matrix.

Tabular Format

There are five structural variations of tabular output: BASIC, w/ROLES, STANDARD, w/RESPONSES, and FULL.

BASIC is one line per document, if the document has any responses, the word "Responses" will be hyperlinked at the end of the row.

w/ROLES will add a second line to each item showing author and assignee

STANDARD will add a third section to each item showing the first part of the "Description" found in the document.

w/RESPONSES will add a sub-table under the description listing the author, date and title of each response.

FULL will add the content of the response under each heading.

Matrix format

MATRIX will generate a report which shows collections of issues, risks or scope change items in a two dimensional grid layout. In the grid cells are links labeled "zoom" which produce tabular reports showing only the documents which are represented in that cell.

When MATRIX format is selected, an new column appears in the control panel labeled "Content"

Content can be COUNT, AGE, WORK or COST. This selection controls the data that appears within each matrix cell. COUNT shows number of documents and number in Open status, AGE shows average and maximum age, WORK show total and actual work hours (from linked assignment), COST shows reported actual and total cost.

SPREADSHEET

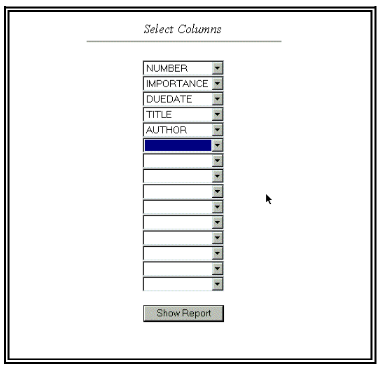
All common spreadsheet and databases accept files in .CSV (comma separated value) format. Clicking on either of the two spreadsheet links will return a file in this format. Your browser will probably stop and give you the option to save this data as a named file or open with one of your existing applications such as Microsoft Excel.

The difference between the Standard and Custom options is the columns included. The Standard Spreadsheet option always returns a specific, preset list of columns. The Custom Spreadsheet option returns a file with the columns displayed in the current report. Both options will export the same set of documents selected for the current report. The output is a simple table, one spreadsheet row per document, and is not sorted. The first row in each file will contain the column headings.

Note: The Spreadsheet options do not appear in MATRIX format.

Customize Columns

Each report is displayed with a predefined set of columns, by clicking this link, you can add, remove and rearrange columns and regenerate the report.



Clicking will display the "Customize Columns" page. This will show one selection droplist for each possible column. Blank entries are ignored.

Set the columns as desired and press Submit. This will regenerate the report with the new column headings.

Save as Custom Report

Web users will find this option quite useful. Once you have a report organized as you like using the View, Selection, Group, Sort, Format and Columns controls, you can record this for later reuse. This is done by simply saving the URL onto your project, participant, program or organization profile.

Click this link to display the Add Internet Link page. Enter a name for the report and press Submit. This will display the profile document and you will see your report name in the "Make an Internet Link" table. Clicking that link will regenerate the report at any future time.

Note that this is saving the set instructions for preparing the report, not the report itself. By storing this in the database, it is available to any user with the rights to read the profile. Note that the contents of the report, however, might vary by user since the report will only include documents the user is allowed to see.

Note: You can also bookmark the report URL in your browser.

Reformat for Printing

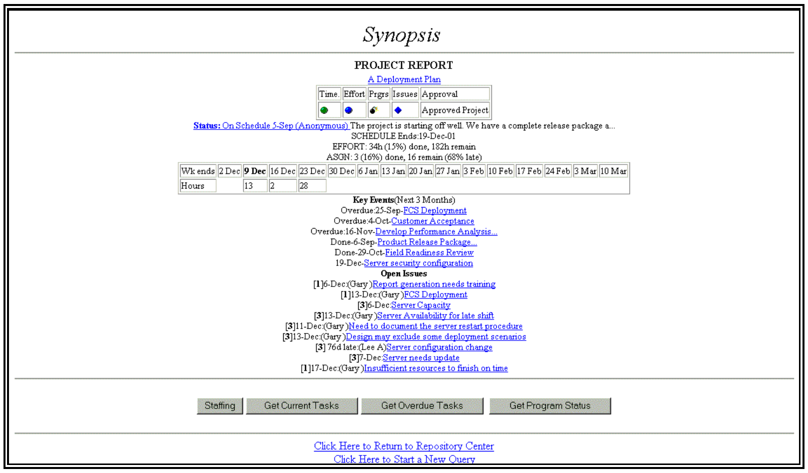
If you want to save a report click this before using the save or print functions of your web browser. This will regenerate the report without any hyperlinks, without the control panel, and without any of the end of report links. The result will be a much cleaner page for printing.

Query Reports

Query Reports are produced by the Ask PG subsystem. Many of the most useful queries are predefined as report options. Each Query report contains links and buttons to generate additional query reports.

Project Synopsis

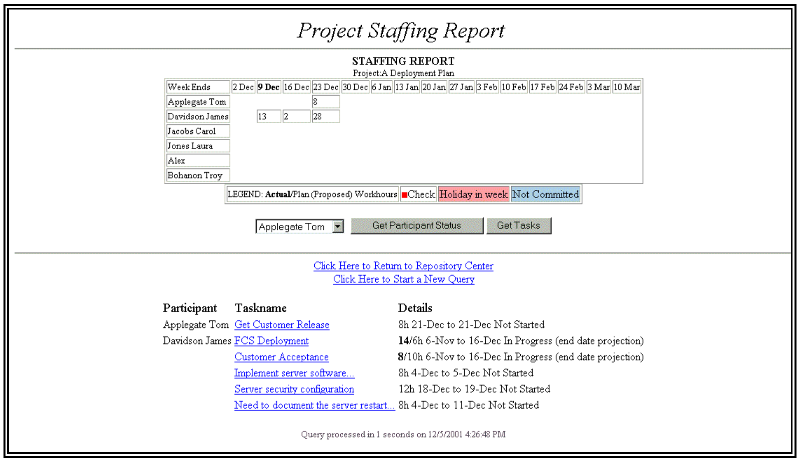
This shows the project workplan, overdue issues, and dashboard status.



Project Staffing Report

This shows the week by week staffing plan and provides links to all current assignments.

Superimposed upon this table is a color code that highlights any weeks for which participants have recorded holiday periods using "Schedule Info" on their participant profiles.


Project Staffing Report

STAFFING REPORT
Project:A Deployment Plan

Week Ends	2 Dec	**9 Dec**	16 Dec	23 Dec	30 Dec	6 Jan	13 Jan	20 Jan	27 Jan	3 Feb	10 Feb	17 Feb	24 Feb	3 Mar	10 Mar
Applegate Tom				8											
Davidson James		13	2	28											
Jacobs Carol															
Jones Laura															
Alex															
Bohanon Troy															

LEGEND: **Actual**/Plan (Proposed) Workhours | Check | Holiday in week | Not Committed

Applegate Tom | Get Participant Status | Get Tasks

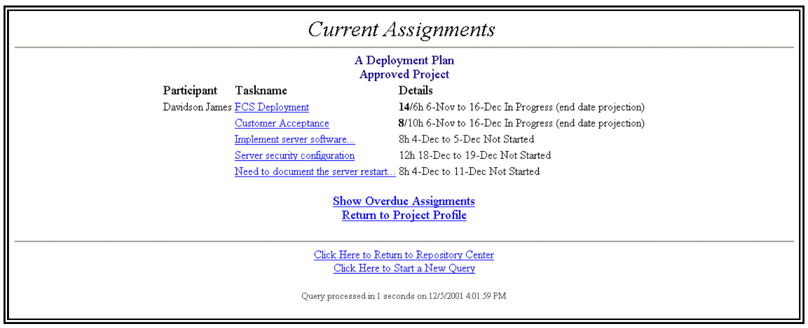
Click Here to Return to Repository Center
Click Here to Start a New Query

Participant	Taskname	Details
Applegate Tom	Get Customer Release	8h 21-Dec to 21-Dec Not Started
Davidson James	FCS Deployment	**14**/6h 6-Nov to 16-Dec In Progress (end date projection)
	Customer Acceptance	**8**/10h 6-Nov to 16-Dec In Progress (end date projection)
	Implement server software...	8h 4-Dec to 5-Dec Not Started
	Server security configuration	12h 18-Dec to 19-Dec Not Started
	Need to document the server restart...	8h 4-Dec to 11-Dec Not Started

Query processed in 1 seconds on 12/5/2001 4:26:48 PM

Current Assignments Report

This shows all current assignment for the project.


Current Assignments

A Deployment Plan
Approved Project

Participant	Taskname	Details
Davidson James	FCS Deployment	**14**/6h 6-Nov to 16-Dec In Progress (end date projection)
	Customer Acceptance	**8**/10h 6-Nov to 16-Dec In Progress (end date projection)
	Implement server software...	8h 4-Dec to 5-Dec Not Started
	Server security configuration	12h 18-Dec to 19-Dec Not Started
	Need to document the server restart...	8h 4-Dec to 11-Dec Not Started

Show Overdue Assignments
Return to Project Profile

Click Here to Return to Repository Center
Click Here to Start a New Query

Query processed in 1 seconds on 12/5/2001 4:01:59 PM

Overdue Assignments Report

This shows all overdue assignments for the project.

The Export Timesheet Data Function

Overview

Timesheet data is frequently needed for invoicing and other applications external to the Project Gateway system. This function provides a way to selectively retrieve such information in both human and machine readable formats.

This function can extract information from timesheets in all conditions including those not yet completed. Hence, it can be used to get "end of month" reports without waiting for the last week to close.

This function will retrieve both repository and archived timesheet data so that a full accounting of long running projects is possible.

Located on the Timesheets menu and Navigator is *the **Export Timesheet Data action***. which will display the Export Timesheet Data form.

The Export Timesheet Data Form

Fill in this form and click the Submit button to generate the report or return a download file.

From/To:

This defines the dates for information to be retrieved. No timesheet information that does not fall into this data range will be included. Note that these dates can begin and end on any day of the week. Data from timesheets that straddle the boundaries will be included for the selected days. This means that you can extract data for calendar periods that are not multiples of weeks.

Format:

This controls the way in which the results will be returned to you. No matter what format you choose, the same net hours will be returned.

Web Table with Links.

This will return a table in HTML format that contains links to each timesheet, participant, project and assignment document that is reported.

Web Table without Links

This will return a table that does not have hyperlinks. Often these render better when printed.

SpreadSheet (CSV)

This will return a text file consisting of a series of lines. On each line the columns of data values will be separated by commas. The first line of the file will contain the names of each column, comma separated.

Database (CSV)

This is exactly the same as the Spreadsheet format except that only data rows are included. There are no headings.

Options:

This section contains a number of checklist items. By using these, you can control which timesheets are including in the results and some formatting.

[ ] No Posted Timesheets

Check this to exclude all data from posted timesheets. Not normally used.

[ ] No Approved Timesheets

Check this to exclude all data from timesheets that are approved but not yet posted.

[ ] No Submitted Timesheets

Check this to exclude all data from timesheets that are still waiting for approval.

[ ] No InProgress Timesheets.

Check this to exclude data from timesheets that have not yet been submitted for approval.

If you are collecting data from the past, the these controls will have not effect because all the timesheets will have been posted. But if you are interested in very current information, then you may or may not what to include inprogress and unapproved reports.

[ ] No Tasks

This excludes all time reported on assignments. Hence all you get is overhead.

[ ] No Overhead

This excludes all time reported on overhead items. Hence all you get is task work time.

Naturally you would never check both No Tasks and No Overhead because there would be nothing left to report.

[ ] No Daily Totals

The system will normally provide daily totals for each time entry up to a maximum of 60 day columns. This will prevent this detail from appearing.

[ ] No Deleted Assignments

The system will normally report all time found on the timesheets, even if the assignments no longer exist. Checking this option will prevent time that was reported on assignments that are no longer in the repository from being included.

[ ] Include Archive

The system normally scans only the timesheets that are stored in the repository database. Check this to have the search results include timesheets in the archive. This may be necessary if you are going more than 12 months back in time depending upon your archiving settings.

Include only if in project

You may select a project. Only time spent on this project, and overhead if not excluded, will be reported.

Include only if this participant

You may select a participant. Only time reported by this participant will be reported. Note that the system is optimized for this rule and the search is much faster if it is used.

Include only if in this organization

You may select an organization. Only time reported by members of this organization will be reported.

Optional Codes

Project Code Field Name

Participant Code Field Name

Assignment Code Field Name

Note: This is an advanced feature which requires some knowledge of the system design. You may want to consult with your Notes administrator or Marin Research.

All repository documents contain information stored as "fields". Each field of a document has a name. You can see the names of fields in a particular document by using the "File/Document properties menu item in notes and looking at the second tab.

These three options allow you to add to the timesheet data report the contents on a particular field in the assignment, project, and participant documents that are associated with the time report. You do not have to use any of these options. If you enter a name of a field that does not exist in the referenced document, you will get an empty column.

e.g.

Set the "Project Code Field Value" to "pg_prgname".

The report will then contain the name of the program to which the project currently belongs.

e.g.

Set the "Participant Code Field Name" to "pg_groupname".

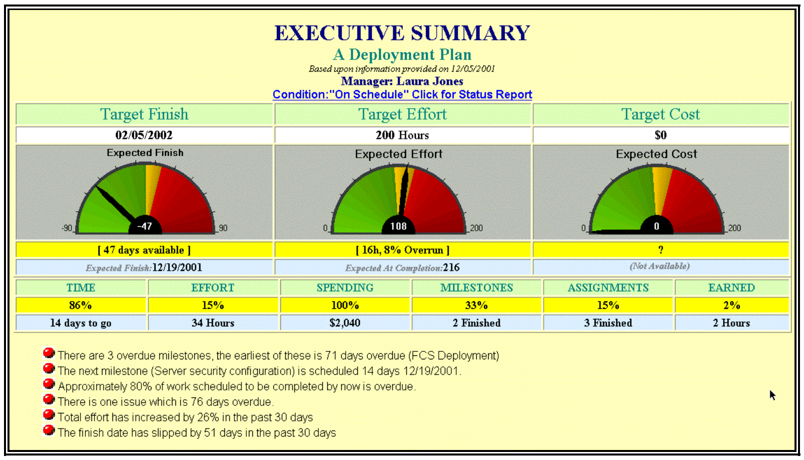
The report will contain a column listing the organization to which the participant currently belongs.

Note that all information returned using these codes will be ***current*** information. It may not be the same as that which was recorded at the time the timesheet was created.

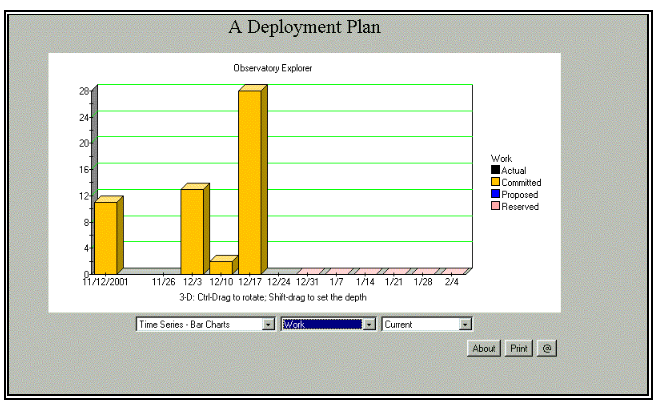
Observatory Reports

When a Project Observatory system is connected, the Observatory Analytics column appears to offer a variety of graphic presentations about this subject.

The Executive Summary, for example, shows the project performance and identifies specific potential problems.



The Work Graph shows week by week workloading.



See the Project Observatory Users Manual for details on the many graphic displays and resource planning functions available in Project Observatory. This documentation can be found on the support page of the Marin Research web site at www.marinres.com.