

# WORKLOAD INDICATOR FOR PERIOD REPORT

## INTRODUCTION

Let's try something new! Instead of the plain old web meeting where someone shows you some slides and leaves you with nothing more than ideas – let's use an industry recognized process for going from goal definition to final metrics and measures, then let's build a report that satisfies these requirements that you can get value out of today. Along the way we'll explore some of the functionality available in Webi and the CA PPM Universes that are new with Clarity 12.1.

## GOAL QUESTION METRIC (GQM) PROCESS RESULTS

For more information on Goal Question Metric, the [Wikipedia entry](#) and the [Goal Question Metric Approach white paper](#) are fantastic places to start.

<b>Goal:</b> Employee Retention - Good Work-Life Balance	<b>Purpose:</b>	Maintain workloads within manageable levels.
	<b>Issue:</b>	Extended periods of over or under-utilization damage employee morale.
	<b>Object:</b>	Resource Actuals
	<b>Viewpoint:</b>	Resource Managers, Executive Leaders
<b>Question:</b>		For a period, what resources have been working un-manageable, over utilized, manageable and under-utilized hours?
<b>Metric:</b>		Period: contiguous 4 weeks Un-manageable: > 150% FTE Over-utilized: 120 to 150% FTE Manageable: 95 to 120% FTE Under-utilized: < 95% FTE

## INDICATOR BUSINESS RULES

**Un-manageable:** Actual Hours > 150% FTE.

**Over-utilized:** Actual Hours between 120% to 150% FTE

**Manageable:** Actual Hours between 95% to 120% FTE

**Under-utilized:** Actual Hours < 95% FTE

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## USE CASES

We'll talk through these on the call.

## REPORT BUILD

We're going to build a report that leverages two queries, a Variable with functions, and then we'll turn data into information with Alerters.

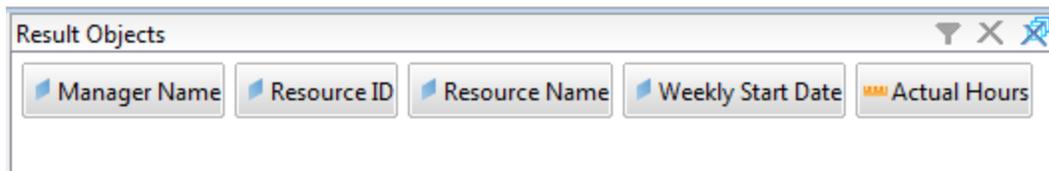
## QUERIES.

### UNIVERSE

Click *New* and create a new report from the *CA PPM Resources* Universe.

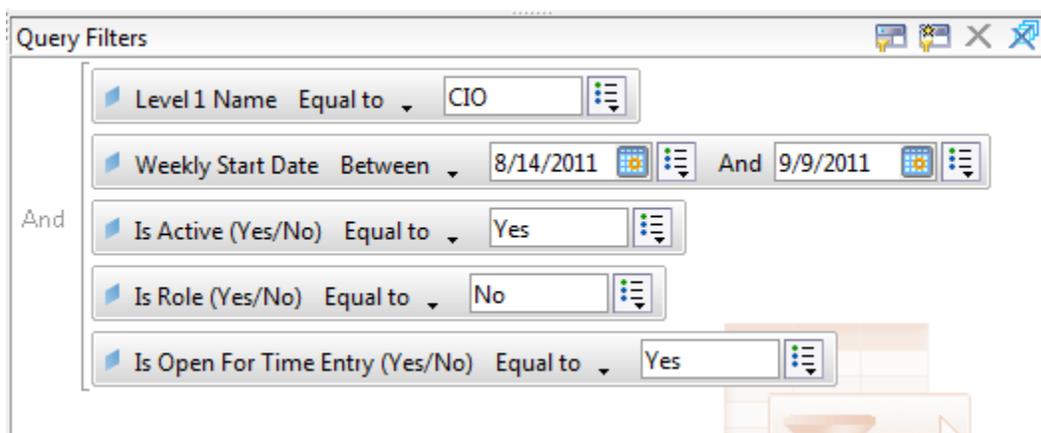
### MAIN QUERY - RESULTS

In the Results Objects, select Manager Name, Resource ID, Resource Name, Weekly End Date and Actual Hours.



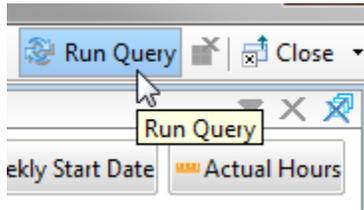
### MAIN QUERY - QUERY FILTERS

The main query will do the bulk of the data pull. During report design, I like to 'hard code' my query to something simple so it will always have known results. After we see the 'hard coded' report run from Clarity we'll swap in our Clarity parameter filters to complete the report integration. For now add OBS Level 1 Name, Weekly Start Date, Is Active, Is Role and Is Open for Time entry with the Filter Parameters as shown below.



Run Query!

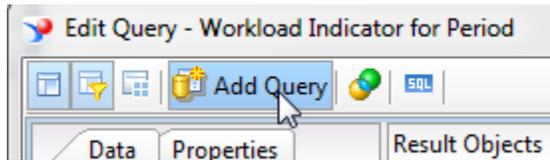
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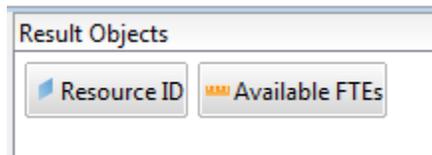
### FTE SUB QUERY

The Main query will maintain referential integrity between the FTE and the Weeks. This will factor in your workday exceptions – for a week with a vacation day your 40 hour employee will have 32 hours of availability or .8 FTE. Since we have our team members enter out of office time I need to ‘normalize’ their FTE. We’ll do this with a 2<sup>nd</sup> query that I’m calling my ‘FTE Sub’.

Click *Add Query* and select the *CA PPM Resources* Universe.

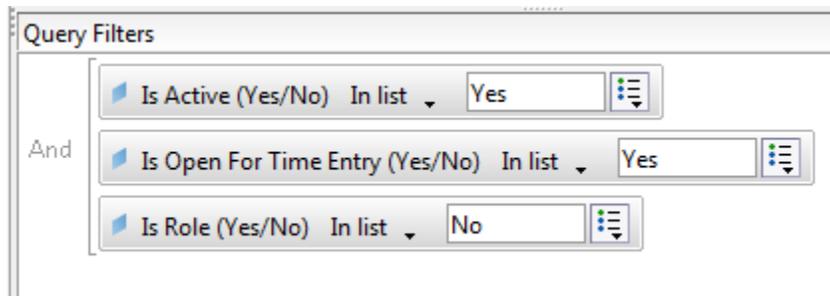


Add Resource ID and Available FTEs to your results.



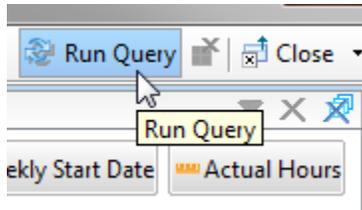
### FTE SUB QUERY – QUERY FILTER

Although my report design will restrict the resource to what the main query returns, no sense in pulling too much extra data. We’ll limit the FTE sub query as shown below.

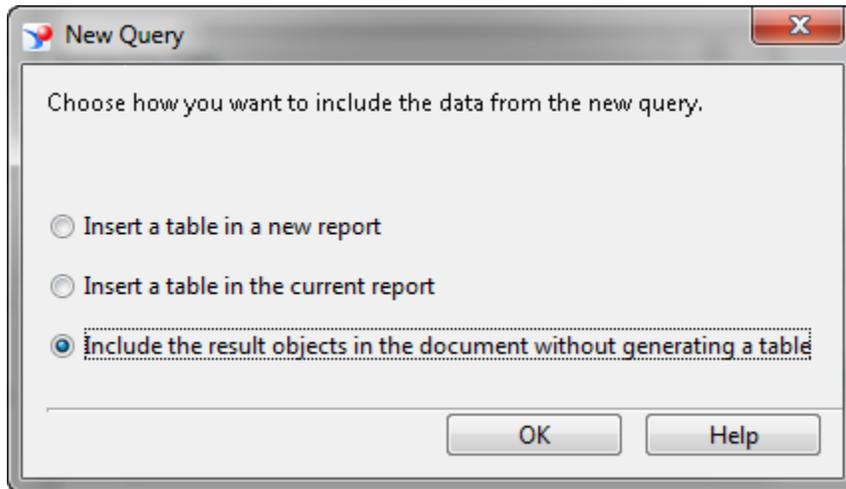


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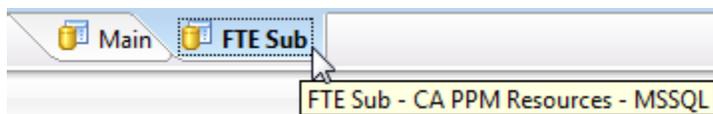
Click the *Run Queries* button to run your queries!



When prompted, select “Include in the results” as shown below.



Rename the 2<sup>nd</sup> Query 'FTE Sub' – this will help us in a future step.

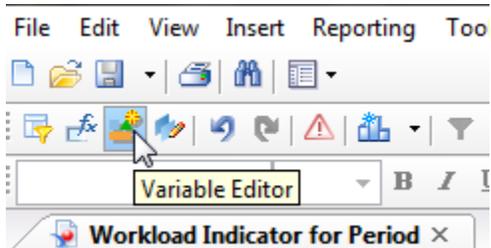


## VARIABLES! CREATING THE INDICATOR

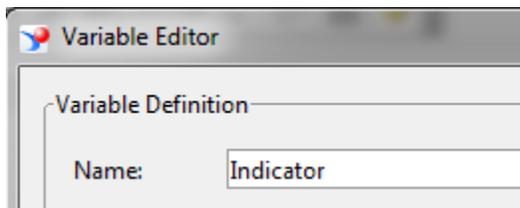
Variables provide you with the ability to do math and all kinds of ‘post data pull’ processing on the results objects in your report. Let’s create a variable that will run our Indicator calculations on the data returned and tell us the resource’s workload state.

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Click the Variable Editor button.



Name your Variable 'Indicator'

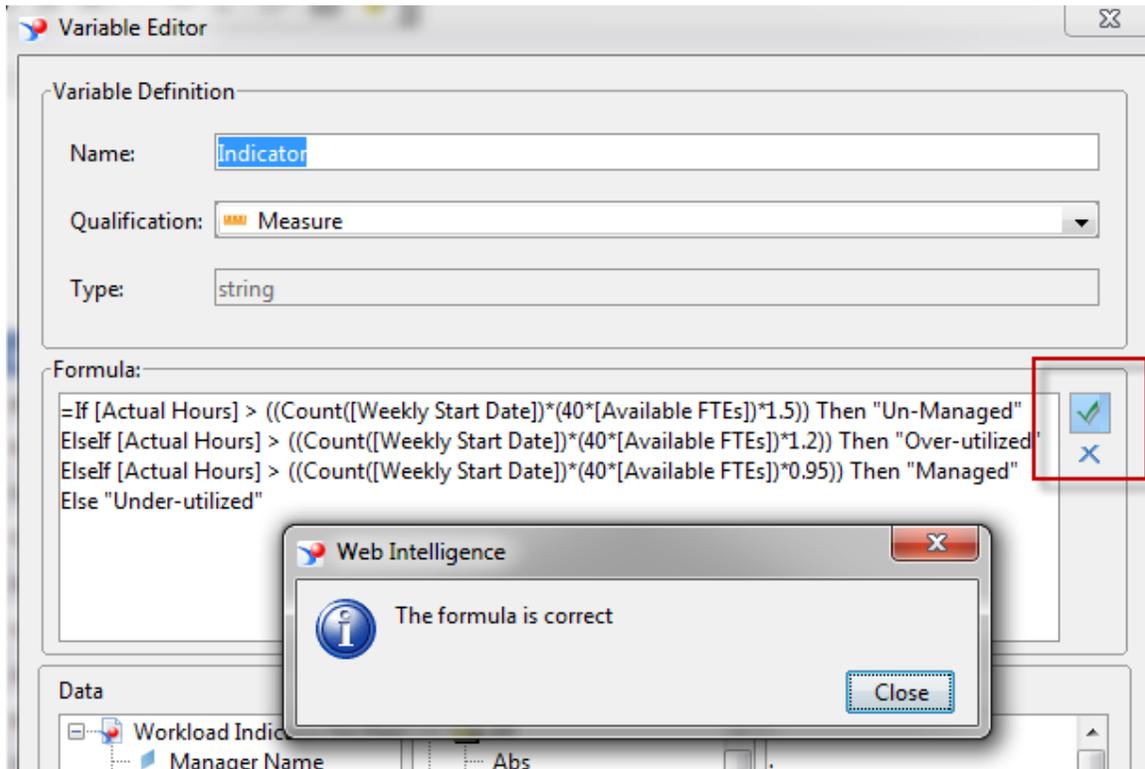


For the sake of our demo, here is the completed function. During the demo we will walk through the creation of this a little bit, I highly recommend SAP's Web Intelligence classes for more on functions.

```
=If [Actual Hours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*1.5)) Then "Un-Managed"  
Elseif [Actual Hours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*1.2)) Then "Over-utilized"  
Elseif [Actual Hours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*0.95)) Then "Managed"  
Else "Under-utilized"
```

Paste in the function then click *Validate*.

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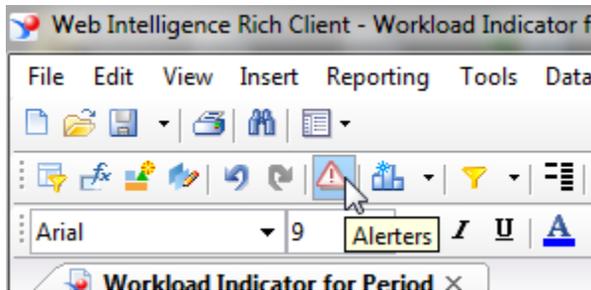


Drag the indicator onto the report UI and inspect your results.

## ALERTERS! TURNING DATA INTO INFORMATION.

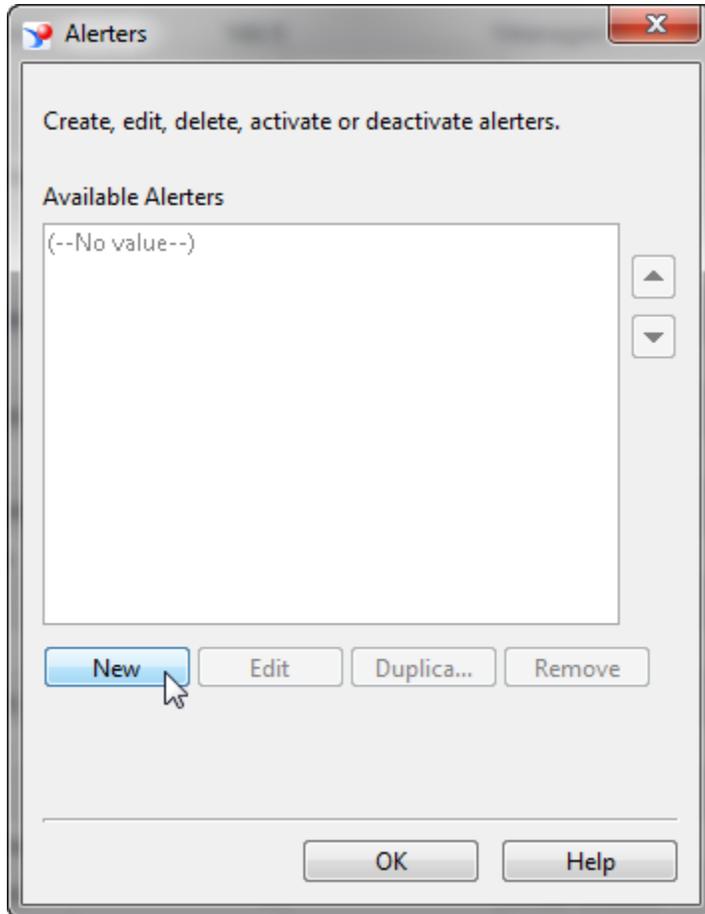
Alerters allow us to change the look of data based upon business rules that we define. We'll use these to colorize our results.

Click the *Alerters* button

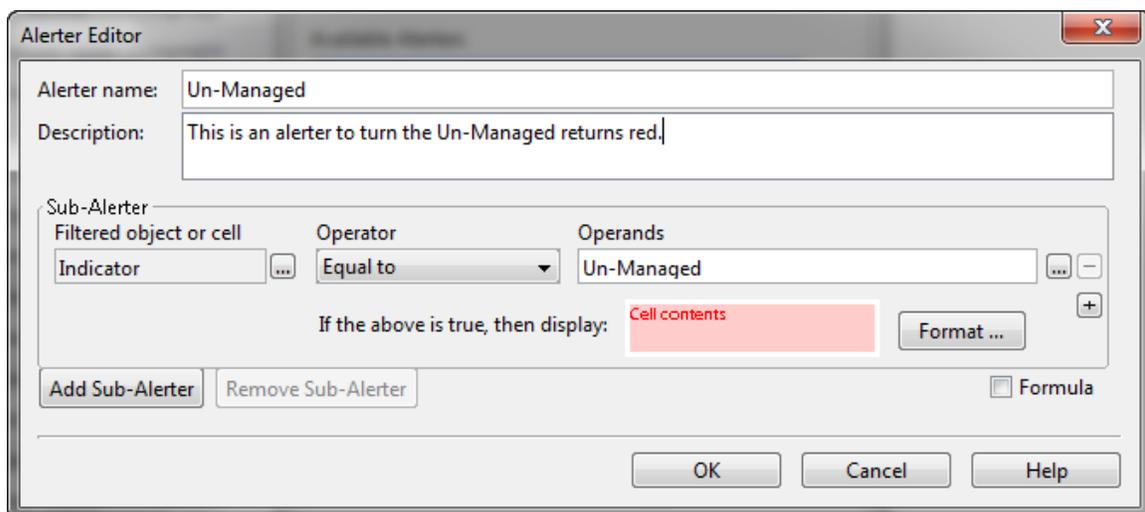


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Click *New*



We'll build these Aleters:



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Alert Editor

Alerter name: Over-utilized

Description:

Sub-Alerter

Filtered object or cell	Operator	Operands
Indicator	Equal to	Over-utilized

If the above is true, then display: Cell contents

Add Sub-Alerter Remove Sub-Alerter  Formula

OK Cancel Help

Alert Editor

Alerter name: Managed

Description:

Sub-Alerter

Filtered object or cell	Operator	Operands
Indicator	Equal to	Managed

If the above is true, then display: Cell contents

Add Sub-Alerter Remove Sub-Alerter  Formula

OK Cancel Help

Alert Editor

Alerter name: Under-utilized

Description:

Sub-Alerter

Filtered object or cell	Operator	Operands
Indicator	Equal to	Under-utilized

If the above is true, then display: Cell contents

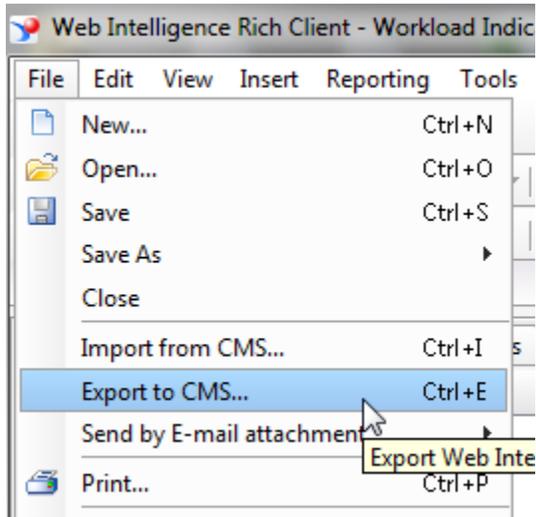
Add Sub-Alerter Remove Sub-Alerter  Formula

OK Cancel Help

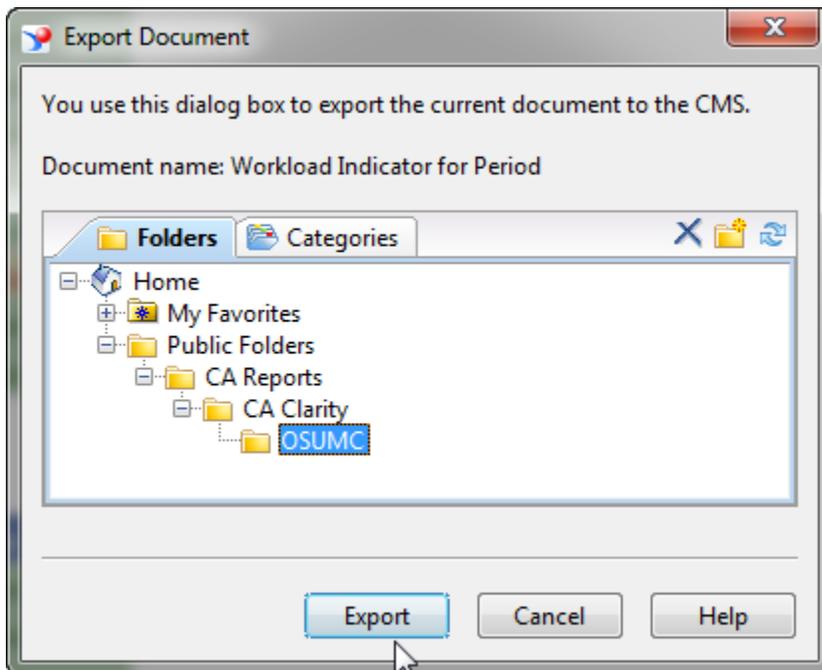
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## RUNNING THE REPORT FROM CLARITY

Export the report to your CMS.



Export to a folder under 'CA Clarity'



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In Clarity, create a Report Definition for the Report

**Administration Tool**

**Report Definition: Properties** ( Report Definition: Workload Indicator for Period )

<b>Properties</b>	⇒
Parameters	<input type="checkbox"/>
Parameter Order	<input type="checkbox"/>
Incompatible Jobs	<input type="checkbox"/>
Associated Categories	<input type="checkbox"/>
<b>Access to this Report</b>	
▶ Full View	<input type="checkbox"/>
▶ Resource	<input type="checkbox"/>
▶ Group	<input type="checkbox"/>
▶ OBS Unit	<input type="checkbox"/>

⇒ = Current  
 = Available

<b>* Job Definition Name</b>	Workload Indicator for Period
<b>* Job Definition ID</b>	osumc_wifp
<b>* Content Source</b>	Customer
<b>* Description</b>	Workload Indicator for Period
<b>Active</b>	<input checked="" type="checkbox"/>
<b>Executable Type</b>	Report
<b>* Executable Name</b>	OSUMC/Workload_Indicator_ ( Enter the report title )

Save and Continue   Save and Exit   Cancel

\* = Required   + = Enter Once   # = Unique

Run the Report to see it return just to validate you have the report deployed properly.

Now let's switch out our hard coded Parameters with Lookup powered parameters from Clarity.

**Administration Tool**

**Parameter** ( Report Definition: Workload Indicator for Period )

<b>* Parameter Label</b>	Resource OBS
<b>* Bind Parameter Code</b>	param_obs_unit ( Enter one word containing letters. )
<b>Type</b>	Browse
<b>Lookup Style</b>	<input checked="" type="radio"/> Single-select <input type="radio"/> Multiple-select
<b>* Browse</b>	OBS Filter Browse
<b>Default</b>	MedCenter IT: CIO ( Click Save to update this field after selecting a new browse. )
<b>Required</b>	<input checked="" type="checkbox"/>
<b>Read-only</b>	<input type="checkbox"/> ( In order to make a parameter read-only a default must be selected. )

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**Parameter** ( Report Definition: Workload Indicator for Period )

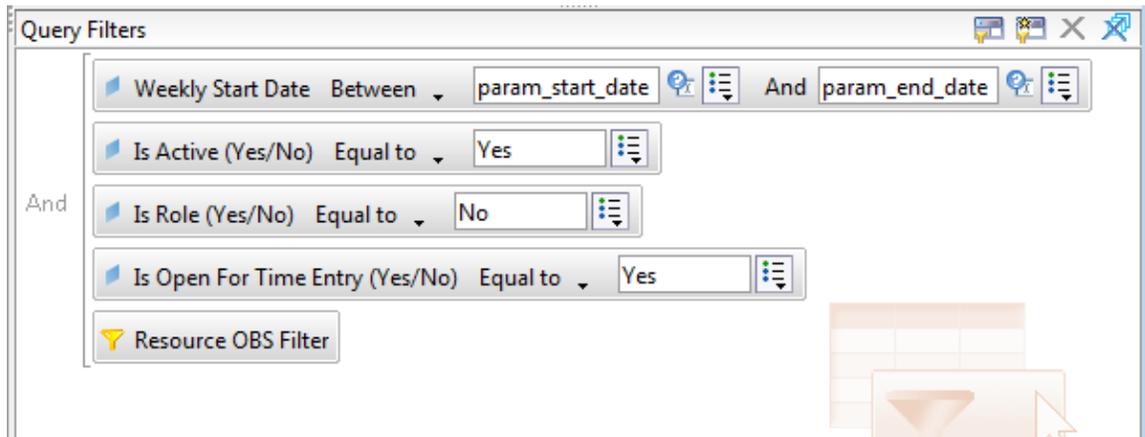
<b>* Parameter Label</b>	Beginning Weekly Start Date
<b>* + # Bind Parameter Code</b>	param_start_date ( Enter one word containing letters. )
<b>Type</b>	Relative Date ▾
<b>Default</b>	<input checked="" type="radio"/> Specific Date <input type="text"/>  <input type="radio"/> Relative Date [-- Select --] ▾
<b>Required</b>	<input checked="" type="checkbox"/>
<b>Read-only</b>	<input type="checkbox"/> ( In order to make a parameter read-only a default must be selected. )
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Submit and Create New"/> <input type="button" value="Cancel"/>	
<b>*</b> = Required <b>+</b> = Enter Once <b>#</b> = Unique	

**Parameter** ( Report Definition: Workload Indicator for Period )

<b>* Parameter Label</b>	Ending Weekly Start Date
<b>* + # Bind Parameter Code</b>	param_end_date ( Enter one word containing letters. )
<b>Type</b>	Relative Date ▾
<b>Default</b>	<input checked="" type="radio"/> Specific Date <input type="text"/>  <input type="radio"/> Relative Date [-- Select --] ▾
<b>Required</b>	<input checked="" type="checkbox"/>
<b>Read-only</b>	<input type="checkbox"/> ( In order to make a parameter read-only a default must be selected. )
<input type="button" value="Save"/> <input type="button" value="Submit"/> <input type="button" value="Submit and Create New"/> <input type="button" value="Cancel"/>	
<b>*</b> = Required <b>+</b> = Enter Once <b>#</b> = Unique	

The updated query filter should look like this:

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Query Filters

Weekly Start Date Between  And

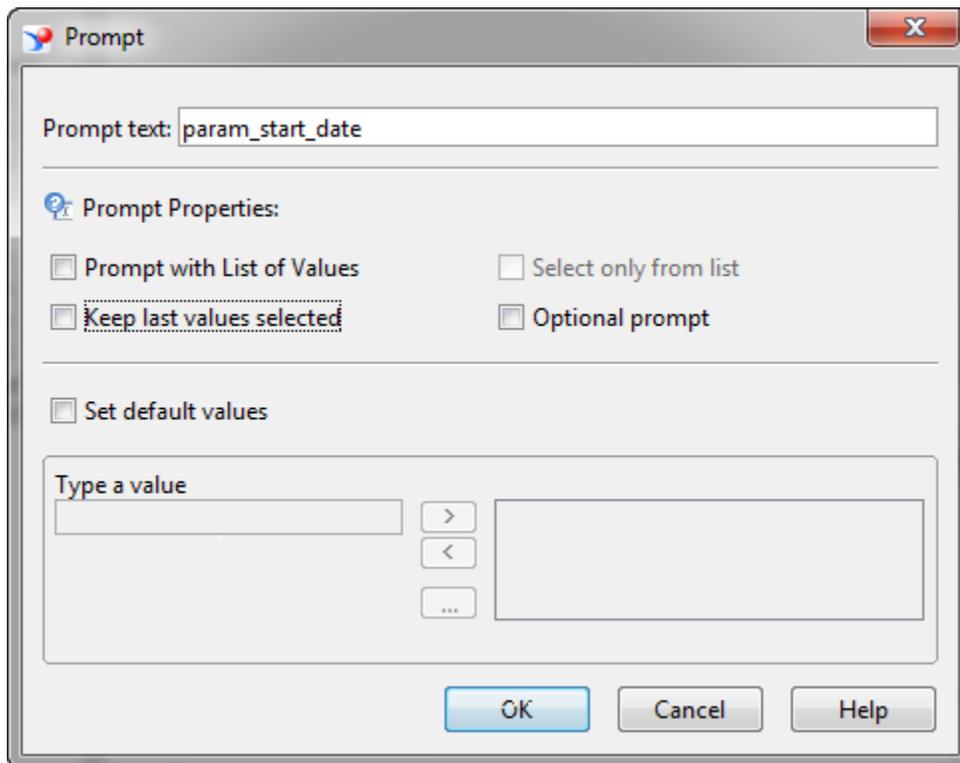
Is Active (Yes/No) Equal to

And Is Role (Yes/No) Equal to

Is Open For Time Entry (Yes/No) Equal to

Resource OBS Filter

Clear the checkboxes on the prompts.



Prompt

Prompt text:

Prompt Properties:

Prompt with List of Values  Select only from list

Keep last values selected  Optional prompt

Set default values

Type a value

>

< ...

OK Cancel Help