

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 <u>Wikipedia entry</u> and the <u>Goal Question Metric</u> <u>Approach white paper</u> are fantastic places to start.

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



USE CASES

We'll talk though 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.

Result Objects				🔻 X 🖈
🔎 Manager Name	Resource ID	Resource Name	Weekly Start Date	

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.

Query	Filters 🛱 🎘 🗶
	🖊 Level 1 Name Equal to 📮 CIO
	✓ Weekly Start Date Between - 8/14/2011 3 = And 9/9/2011 3 =
And	✓ Is Active (Yes/No) Equal to ¥es
	Is Role (Yes/No) Equal to _ No
	Is Open For Time Entry (Yes/No) Equal to Yes

Run Query!



🛞 Run Query	y 📸 🗐 式 Close 🔹
Ri	In Query X 🕺
ekly Start Date	Actual Hours

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 2nd query that I'm calling my 'FTE Sub'.

Click Add Query and select the CA PPM Resources Universe.

P Edit Query - Workload Indicator for Period		
🗖 🗟 🔚 🚺 Add Query 🤇	Su	
Data Properties	Result Objects	

Add Resource ID and Available FTEs to your results.

Result Objects	
Resource ID	🚥 Available FTEs

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.

Query	Filters	
	Is Active (Yes/No) In list ↓ Yes	
And	Is Open For Time Entry (Yes/No) In list _ Yes	IĘ
	🔰 Is Role (Yes/No) In list 🖕 No 逞	



Click the Run Queries button to run your queries!

🛞 Run Quer	y 💉 🗟 🖬 Close 🔻
Ri	un Query
ekly Start Date	Actual Hours

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

🦻 New Query	x
Choose how you want to include the data from the new query.	
 Insert a table in a new report Insert a table in the current report Include the result objects in the document without generating a table 	le
ОК Неір	

Rename the 2^{nd} 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.



Click the Variable Editor button.

File	Edit	View	Insert	Report	ing	То	00
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		Variabl	e Editor		B	I	Ī
	Vor	kload I	ndicato	for Per	riod	×	

Name your Variable 'Indicator'

🥜 Variable Editor		
Variable Definition		
Name: 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"
Elself [Actual Hours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*1.2)) Then "Over-utilized"
Elself [Actual Hours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*0.95)) Then "Managed"
Else "Under-utilized"

Paste in the function then click Validate.



🎐 Variable Editor		23
Variable Definit	ion	
Name:	Indicator	
Qualification:	Measure	•
Туре:	string	
Formula: =If [Actual Hot Elself [Actual H Elself [Actual H	urs] > ((Count([Weekly Start Date])*(40*[Available FTEs])*1.5)) Then "Un-Managed" lours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*1.2)) Then "Over-utilized" lours] > ((Count([Weekly Start Date])*(40*[Available FTEs])*0.95)) Then "Managed"	×
Else "Under-ut	Web Intelligence	
Data	ad Indic Close	^

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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File	Edit	View	Insert	Reporting	Tools	Data
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1 😽	- ^f * 📫	° 🍫	90	<u>A</u> <u>-</u>	Y •	=
Aria	I		▼ 9	Alerters	ΙÜ	A
	Workload Indicator for Period X					



Click New

	Y Alerters
	Create, edit, delete, activate or deactivate alerters.
l	Available Alerters
	(No value)
	New Edit Duplica Remove
	ОК Неір

We'll build these Aleters:

Alerter Editor								×
Alerter name:	Un-Managed							
Description:	This is an aler	ter to turn the	e Un-Managed r	eturns	red.			
Sub-Alerter — Filtered object Indicator	t or cell	Operator Equal to If the above	✓	Oper Un-l play:	rands Managed Cell contents		Format]
Add Sub-Alert	er Remove S	Sub-Alerter					E F	ormula
					ОК	Can	cel I	Help



Thursday, September 15, 2011

Alerter Editor			— X —
Alerter name:	Over-utilized		
Description:			
Sub-Alerter — Filtered object	t or cell	Operator Operands	
Indicator		Equal to	
		If the above is true, then display:	Format
Add Sub Alort	Pomovo	ub Alartar	E Formula
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-		ОК	Cancel Help
Alerter Editor			×
Alerter name:	Managed		
Description:			
_ Sub-Alerter —	L		
Filtered object	t or cell	Operator Operands	
Indicator		Equal to Managed	
		If the above is true, then display:	Format
Add Sub-Alert	er Remove	ub-Alerter	🔲 Formula
		UK	Cancel Help
Alerter Editor		to provide the film of the fil	
Alerter name:	Under-utilized		
Description:			
Sub-Alerter —	L		
Filtered object	t or cell	Operator Operands	
Indicator		Equal to Under-utilized	
		If the above is true, then display:	Format
Add Sub-Alert	Remove	ub-Alerter	Formula
		OK	Cancel Help

MedCenter IT – Workload Indicator for Period Report



RUNNING THE REPORT FROM CLARITY

Export the report to your CMS.



Export to a folder under 'CA Clarity'

Y Export Document	×	
You use this dialog box to export the current document to the CMS.		
Document name: Workload Indicate	or for Period	
Folders Categories	🗙 🚞 🎘	
🖃 🌍 Home		
· · · · · · · · · · · · · · · · · · ·		
Public Folders		
Export Cancel Help		



In Clarity, create a Report Definition for the Report

Administration To	ol			
Report Definition: F	Properties	(Report Definition: Workload Indicator for Period)		
r		(
Properties	⇔	🛯 Job Definition Name 🛛 Workload Indicator for Period 🗎		
Parameters		🕫 🖬 🗰 Job Definition ID osumc wifp		
Parameter Order				
Incompatible Jobs		Customer V		
Associated Categorie		Description Workload Indicator for Period		
Access to this Report		Active		
Full View				
Resource		Executable Type Report -		
▶ Group		Executable Name OSUMC/Workload_Indicator_		
OBS Unit		(Enter the report title)		
➡ = Current		Save and Continue Save and Exit Cancel		
= Available		📧 = 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	Administration Tool			
Parameter (Report Defin	ition: Workload Indicator for Period)			
r				
Parameter Label	Resource OBS			
🕫 🖸 🗰 Bind Parameter Code	param_obs_unit (Enter one word containing letters.)			
Туре	Browse -			
Lookup Style	 Single-select Multiple-select 			
Browse	OBS Filter Browse	MI		
Default	MedCenter IT: CIO (Click Save to update this field after select	ting a new browse.)		
Required				
Read-only	(In order to make a parameter read-only a	default must be selected.)		



Parameter (Report Definition: Workload Indicator for Period)		
r		
Parameter Label	Beginning Weekly Start Date	
🕫 🖬 🗰 Bind Parameter Code	param_start_date (Enter one word containing letters.)	
Туре	Relative Date 👻	
Default	 Specific Date Relative Date [Select] 	
Required		
Read-only	(In order to make a parameter read-only a default must be selected.)	
Save Submit Submit a	nd Create New Cancel	
📧 = Required 🗈 = Enter One	ce 😐 = Unique	

Parameter (Report Defin	ition: Workload Indicator for Period)	
Paramatar Label	Ending Weekly Start Date	
	Ending weekly start Date	
🕷 🗈 🗰 Bind Parameter Code	(Enter one word containing letters.)	
Туре	Relative Date 👻	
Default	 Specific Date Relative Date [Select] 	
Required		
Read-only (In order to make a parameter read-only a default must be selected.)		
Save Submit Submit a	Ind Create New Cancel	
1 = Required 🗈 = Enter Once 🗰 = Unique		

The updated query filter should look like this:



Quent	Filter: 🔤 🕅 🖌	1
Query		~
	📕 Weekly Start Date Between 🗸 param_start_date 💱 Ę And param_end_date 🕸 Ę	
	Is Active (Yes/No) Equal to _ Yes	
And	Is Role (Yes/No) Equal to _ No	
	Is Open For Time Entry (Yes/No) Equal to Yes	
	Y Resource OBS Filter	

Clear the checkboxes on the prompts.

🌱 Prompt	
Prompt text: param_start_date	
😵 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