

## Changepoint 2020

### Dashboard template: Project Management, revision 2

This template is provided as a sample dashboard that can be used as is or customized.

**Note:** Customization of this template is not covered by Changepoint support agreements.

The Project Management dashboard provides insight into the status of projects.

#### Changepoint version

This dashboard is dependent on Changepoint 2020 (Cognos patch 19.00.135.000).

### Revision 2 updates

#### Dashboard updates

- Added the currency used to the Budget Summary tab
  - Dashboard now only requires two data set fields to be changed to reference the reporting currency of choice.
  - Risk and Issue 'costs' are based on a configurable field, which removes the need for currency conversation.
- All reports can be printed to PDF format.
- Filter added to Projects Over Budget to display only projects at issue.
- All reports in tabs were reformatted to allow the expand function to be used.
- Dashboard version number is displayed in bottom right corner of dashboard.

#### Data set and data module updates

- All data modules use a Session ID filter to restrict access to data based on the signed-in user. This filter is not in the Filter section and cannot be removed by the user.
- Data sets pull all calculations from a single column that defines the reporting currency for the dashboard.

### Portfolio Analysis tab

Portfolio Analysis information is provided in the following sections:

- Budget Margin Index
- Actual Margin Index
- Planned Effort (hours)
- Actual Effort (hours)

- Billable not Submitted MTD
- Billable not Approved MTD
- Budget Margin % and Actual Margin % by Customer
- Risk Heat Map – Possibility vs Impact
- Change Requests – Count by Project
- Portfolio Planned Costs tab
- Portfolio Planned Effort tab

### **Gantt View tab**

Reports the overall health of all projects by comparing planned effort to actual effort in the following sections:

- Planned Effort (hours)
- Actual Effort (hours)
- Forecast Remaining Effort (hours)
- Project Type (Count) by Project Type
- Project Gantt View – All Active Projects colored by Projects starting in the next 30 days

### **Budget Summary tab**

Reports various budget totals, details, and comparisons in the following sections:

- Currency
- Budget Margin Index
- Actual Margin Index
- Days since Project Budget Revised
- Budget Summary Analysis:
  - Budget Total Billable
  - Budget Total Costs
  - Budget Variance
  - Actual Total Billable
  - Actual Total Costs
  - Actual Variance
  - Billable Variance
  - Cost Variance
  - Budget to Costs Variance

- Projects Over Budget
- Budget details in the following tabs:
  - Budget Billable Details tab
  - Budget Costs Details tab
  - Budget Revision Details tab
  - Budget vs Actuals tab

## **Risks and Issues tab**

Reports information about risks and issues in the following sections:

- Total Risk (Active)
- Total Risks
- Count by Customer – project issues per customer
- Risk Heat Map – possibility of occurrence vs. level of impact
- Total Issues (active)
- Total Issues
- Risks tab – list of risks
- Issues tab – list of issues

## **Change Requests tab**

Reports information about change requests in the following sections:

- Open Change Requests
- Total Estimated Hours
- Change Request Count by Status
- Count by Customer – change requests per customer
- Count by Project – change requests per project
- Detailed list of change requests

## **Time Analysis tab**

Time analysis information is provided in the following sections:

- Effort not Submitted MTD (month to date)
- Effort not Approved MTD
- MTD – Time Lifecycle
- Billable Effort not Submitted MTD

- Billable Effort not Approved MTD
- MTD Time Analysis – Project tab
- MTD Time Analysis – Resource tab
- YTD Time Analysis – Project tab
- Prior Month – Project tab
- MTD Submitted not Approved tab
- Current Year – Submitted not Approved
- Previous Year – Submitted not Approved tab

## Requirements for implementing the Project Management dashboard

The dashboard provides visibility into projects. Each tab of the dashboard is focused on a specific process or results.

To enable all functionality in the tabs you must do the following:

- Upload IBM Cognos Analytics extensions to your Cognos environment to support some functionality in the dashboard
- Implement and use some Changepoint functionality as part of your project management process
- Implement specific configurable fields that are used to supplement specific data requirements in the Risks and Issues tab and Change Requests tab

### General dashboard requirements

#### IBM Cognos Analytics requirements

To support some of the functionality in the Project Management dashboard, you must upload the following IBM Cognos Analytics add-ons to your environment:

1. Download the custom Gantt visualization from the following link:  
<https://community.ibm.com/accelerators/catalog/content/Gantt>
2. Upload the visualization using the instructions from the following link:  
[How to import a custom visualization \(ibm.com\)](#)

Download the tabbed widget extension that corresponds to your IBM Cognos Analytics version from the following links:

If you have upgraded to IBM Cognos Analytics 11.2:

[https://community.ibm.com/accelerators/catalog/content/Present-additional-content-by-adding-a-Tabbed-Widget-\(11.2.0-to-11.2.1\)](https://community.ibm.com/accelerators/catalog/content/Present-additional-content-by-adding-a-Tabbed-Widget-(11.2.0-to-11.2.1))

For prior versions:




[https://community.ibm.com/accelerators/catalog/content/Present-Additional-Content-by-adding-a-Tabbed-Widget-\(11.1.7-and-above\)](https://community.ibm.com/accelerators/catalog/content/Present-Additional-Content-by-adding-a-Tabbed-Widget-(11.1.7-and-above))

3. Upload the extension using the instructions from the following link:

[How to upload an extension \(IBM.com\)](#)

### Changing the currency used in the dashboard

You must change the currency in both the **DS – Project Budget Summary – Local Currency** data set and the **DS – Project Portfolio – Local Currency** data set.

4. In Analytics Portal, click **Team Content > Project Manager Package (Official) > Data Sets**.
5. In the data set list, to the right of **DS – Project Budget Summary – Local Currency**, click more ... > **Edit data set**.
  - a) In the **Data items** list, double-click **Local Currency Conversion**.
  - b) In **Expression Definition**, delete the currency.
  - c) In the **Available Components**, click the data items icon .
  - d) Double-click the currency you want to use, which adds it to the **Expression Definition** area. The currencies currently available are: USD, CAD, GBP, EUR, AUD.
  - e) Check for errors by clicking the validate icon .
  - f) Click **OK** to close the **Data item expression** dialog box.
  - g) Click the save icon  > **Save and load data**.
  - h) Close the data set.
6. Repeat this procedure for the **DS – Project Portfolio – Local Currency** data set.

### Budget Summary tab requirements

Projects must have at minimum a budget created. Data in the dashboard is based on the latest budget version that is saved.

To keep actuals values current in budgets, the “Calculate Actuals” option must be enabled on project budgets.

## Risks and Issues tab and Change Requests tab requirements

Changepoint requests must be used to record and track risks, issues, and change requests. The following configurable fields must be implemented in your Changepoint environment for the required data to appear in the **Risks and Issues** and **Change Requests** tabs.

### Request configurable fields required for risks

- Level of Impact – RequestCode497
- Probability of Occurrence – RequestCode498
- Risk Rating – RequestText499
- Schedule Impact (days) – RequestText496
- Severity Level – RequestCode499
- Total Estimated Cost – RequestText498
- Total Estimated Effort – RequestText497

### Request configurable fields required for issues

- Schedule Impact (days) – RequestText496
- Total Estimated Cost – RequestText498
- Total Estimated Effort – RequestText497

### Request configurable fields required for change requests

- Total Estimated Cost – RequestText498
- Total Estimated Effort – RequestText497

## Portfolio Analysis tab requirements

Portfolio analysis information requires that Changepoint Portfolio Metrics be used.

The following metrics from the Accelerator database are required:


- Metric – Project Planned Cost
- Metric – Project Planned Effort

The metrics are populated from the following information:

- Planned Costs
- Planned Effort

### Setting up the data for the Portfolio Analysis tab

1. In Changepoint, create the portfolio (suggested name is **All Projects**):

- a) In the **Metrics** tab, add at minimum the following two metrics:
    - Project Effort
    - Project Planned Costs
  - b) In the **Items** tab, select the projects that you want to include in the portfolio (suggested to include all active projects).
  - c) Click **Save**.
2. Add the portfolio to a filter in the dashboard data set:
- a) Click **Reports > Analytics Portal**.
  - b) Click **Team Content > Project Manager Package (Official) > Data Sets**.
  - c) In the data set list, to the right of **DS – Project Portfolio – Local Currency**, click more ... > **Edit data set**.
  - d) Display **Data set > Queries > Project Portfolios**.
  - e) In the **Detail Filters** section, double-click the **[Portfolio] includes (portfolio name)** filter.
  - f) In the **Available items** section, select the portfolios to be included.
  - g) Click the save icon  > **Save and load data**.
  - h) Close the data set.