Changepoint PSA

Reports Dictionary by Category Reference

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Changepoint PSA Reports Dictionary by Category Reference

CHAPTER 1
Reports Dictionary by Category Introduction

Accessing Reports

The Reports tree view can be accessed using two methods:

- In the Applications bar, expand the **My Applications** section and click **Reports**.
- Click the **Folders** drop-down list and select **Reports**.
  The Reports tree view opens. All available reports (that you have access to) are listed.

Sorting Reports

You can sort reports in the Reports tree view either **By Report Name** or **By Category**.

Sorting reports by report name displays all reports alphabetically in the Reports tree view. However, the report folders My Report Designs, Saved Reports, Completed Reports and Received Reports remain. These folders contain custom reports that were created with Report Designer.

If you sort by category, reports display in their category folder in the Reports tree view.

1. In the Reports tree view, click **Options**.
2. From the **Options** menu, select a report sort type, **By Category** or **By Report Name**.
3. If you selected **By Category**, expand the categories to view the individual reports.
4. Select the report that you want to access.
5. If a report filter screen displays, complete it to include or exclude specific information in the report.

Reports Not Listed in the Reports Dictionary

The following reports are described in other product guides:

- Contractor Management Reports—see the "Contractor Information" chapter in the *Resource Management User Guide*.

- Customer Relationship Management Reports—For information on Demand Management and Scenario Screening, see the "Scenario Comparisons Worksheet" chapter in the *Customer Relationship Management User Guide*.

Budget Management Reports

Budget Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **Budget** category.

   The following reports are included under the **Budget** category:
   - "Budget Details Report" on page 11
   - "Budget vs. Actual by Item" on page 15
   - "Budget vs. Actual by Month" on page 18
   - "Budget vs. Actual Costs by Task (With Work Code)" on page 20
   - "Budget vs. Actual for Selected Fixed Fee" on page 22

Budget Details Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Budget** category and click **Budget Details Report**.

   The **Budget Details Report** displays in the Details view.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report is used to assess the impact of budget revisions.

Display Details

If viewing **Engagement and Project by Project**, the following information displays.

- Project name
- Total for Services
- Total for Project
- Total for Engagement

If viewing **Engagement only by Item or by Revision**, the following information displays.

Services:

- Billing Role
- Resource name
- Start date
- End date
- Hours
- Cost rate
- Extended cost
- Billing rate
- Extended billing amount
- Margin
- Revision date
- Revision number
- Comments
- Total Services
- Total for Engagement

Expenses:

- Category
- Type
- Date
- Billable
- Quantity
- Cost
- Extended Cost
- Expense Multiplier
- Extended Billing Amount
- Margin
- Revision Date
- Revision Number
- Comments

Fixed Fees:

- Deliverable
- Date
- Hours
- Cost

- Extended Cost

- Billing Amount

- Margin

- Revision Date

- Revision Number

- Comments

Products:

- Category

- Product

- Date

- Quantity

- Cost

- Extended Cost

- Price

- Extended Billing Amount

- Margin

- Revision Date

- Revision Number

- Comments

> **Note:** If the user does not have the appropriate features to view or override cost rates, they will not be able to see the cost information.

If viewing **Engagement and project by Item** or **by Revision**, the following information displays.

Common to all sections:

- Project name

- Extended cost

- Margin

- Revision date

- Revision number

- Revision name

- Comments

- Totals

Services:

- Billing Role

- Resource name

- Start date

- End date
- Hours
- Cost rate
- Extended cost
- Billing rate
- Extended billing amount

Expenses:

- Category
- Type
- Date
- Billable
- Quantity
- Cost
- Extended cost
- Expense multiplier
- Extended billing amount

Fixed Fees:

- Deliverable
- Date
- Hours
- Cost
- Extended cost
- Billing amount

Products:

- Category
- Product
- Date
- Quantity
- Cost
- Extended cost
- Price
- Extended billing amount

Note: For all of the reports, the contingency amount displays at the bottom.

System-Defined Criteria

- **Engagement only, by item** selects all budget items for the selected engagement and for the selected revision (defaults to the latest revision number if the user does not select one). It then displays related budget items for each of four sections (services, fixed fees, products, and expenses).

- **Engagement only, by revision** selects all budget items for the selected engagement and displays one section per revision, showing the changes between each revision number.

- **Engagement and project, by revision** shows services, expenses, product and fixed fee sections, with an additional column for the project name in each section. These sections will be grouped by revision number (four sections for each revision number beginning with 0, then 1, etc.)

- **Engagement and project, by project** and **by item** selects all budget items for the selected engagement and projects for the selected revision number (defaulting to latest if none is selected) and displays one section for each project. Within each section a section type is also displayed (services, fixed fees, product, expenses).

User-Specified Criteria

- Options
- Company name
- Engagement
- Project name

URL

/Finance/BudgetReports/rpDetailsSelection.asp

Budget vs. Actual by Item

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Budget** category and click **Budget vs. Actual by Item**.

   The **Budget vs. Actual by Item** report displays.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report allows users to compare budget amounts against actual results, by item. It can be leveraged to view "actuals" regardless of whether or not budgeting is being used.

Display Details

- Company name

- Engagement
- Engagement currency
- Project

For sections, see the System-Defined Criteria.

If split billing is used, the report will include invoiced amounts for the phantom engagement and the main engagement.

Since time is tracked against the master engagement, only the master is available for selection. Otherwise, the report would display the invoiced amounts for the phantom engagements, but no cost information. Since that would be misleading, the master engagement displays all invoiced amounts (including amounts for phantom engagements) and all cost amounts.

System-Defined Criteria

- The **Engagement only** selection shows the most current revision for the engagement, sorted into sections based on type (services, product, fixed fee, expenses).

- The **Services** section, shows one row per budgeted resource/billing role combination, with all budgeted and actual information summarized.

- **Actuals** will be based on the status chosen (entered, submitted, approved or invoiced) for time.

  Note: Time entries selected will display at that status level (for example, any time statused as entered would be entered plus submitted plus approved plus invoiced time, while approved time would be only approved plus invoiced).

- If there are **actuals and no budget**, there will be a row showing the actual data with zero budgeted data.

- For **Revenue** calculation for invoiced status, select invoiced time. For revenue calculation for entered, submitted or approved status, select from time, apply the invoicing logic to get the billing amount.

- For the **Expenses** section, cost actuals will be based on the status of the expense, using the same logic as time (i.e. the expense entries will be at least at the status chosen). For revenue calculation for invoiced status, select invoiced expenses. For revenue calculation for entered, submitted or approved status, select expenses at the chosen status, applying the billable flag (yes or no) and the percent of expenses as specified on the engagement.

- For **Products**, actual revenue will be based on the products specified on the engagement's product tab. If entered, submitted or approved status is chosen, all products will show as revenue; if invoiced is chosen, only those products which have been invoiced will be shown. For cost, the materials table is used, and will be summarized to the product category/product. Materials have no particular status, so will be shown for all statuses chosen.

- For the **Fixed Fee** section, revenue will be shown per fixed fee item. If the invoiced status is shown, only invoiced fixed fees will be shown for actual revenue. For entered, submitted and approved status, all fixed fees will be shown for actual revenue. For cost, hours associated with the fixed fee will be accumulated, also at the chosen status (entered, submitted, approved, invoiced).

- The **Engagement and project** selection follow the same logic as above, except that the services section will show one row per task.

Actual Costs

Actual Costs are taken from the time table.

Overtime Cost Rates

Overtime hours will only be considered if the **Include overtime hours** check box in the Engagement Billing Rates dialog box is selected.

Overtime cost rates are determined as follows.

Scenario 1—The Resource Cost Rate setting is specified for the Billing Office:

- If the resource only is specified in the Engagement Billing Rates dialog box and the resource only (no billing role) is specified in the task assignment, the engagement overtime cost rate entered for the resource in the Engagement Billing Rates dialog box as the overtime cost rate.

- If both the resource and billing role are specified in the Engagement Billing Rates dialog box and in the task assignment, the engagement overtime cost rate entered for the resource and billing role combination in the Engagement Billing Rates dialog box is used as the overtime cost rate.

- If only the billing role is specified in the Engagement Billing Rates dialog box and the resource and billing role are specified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

- If only the billing role is specified in the Engagement Billing Rates dialog box (i.e., no resource), and only the resource is specified in the task assignment (i.e., no billing role), the overtime cost rate in the Resource Profile is used (with no multiplier).

- If the Engagement Billing Rates dialog box is left blank (i.e., no billing role or resource is specified), and therefore no billing role is identified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

Scenario 2—The Billing Role Cost Rate setting is specified for the Billing Office

- If the resource only is specified in the Engagement Billing Rates dialog box and the resource only (no billing role) is specified in the task assignment, the engagement overtime cost rate entered for the resource is used as the overtime cost rate.

- If both the resource and billing role are specified in the Engagement Billing Rates dialog box and in the task assignment, the engagement overtime cost rate entered for the resource and billing role combination is used as the overtime cost rate.

- If only the billing role is specified in the Engagement Billing Rates dialog box, and the resource and billing role are specified in the task assignment, the engagement overtime cost rate entered for the billing role is used.

- If only the billing role (i.e., no resource) is specified in the Engagement Billing Rates dialog box, and only the resource is specified in the task assignment (i.e., no billing role), the zero overtime cost rate is used.

- If the Engagement Billing Rates dialog box is left blank (i.e., no billing role or resource is specified), and therefore no billing role can be identified in the task assignment, the zero overtime cost rate is used.

User-Specified Criteria

- Company name

- Engagement

Note: If split billing is used, phantom engagements are not available for selection. However, the report will include invoiced amounts for the phantom engagement and the main engagement.

- Project
- Actual revenue and cost to use

URL

/Finance/BudgetReports/rpBudgetvsActual.asp

Budget vs. Actual by Month

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Budget** category and click **Budget vs. Actual by Month**.

   The **Budget vs. Actual by Month** report displays in the Details view.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report allows users to compare budget amounts against actual results, broken down by month. It can be leveraged to view "actuals" regardless of whether or not budgeting is being used.

The Resource Demand Calculation job must be run in order for the planned hours to be calculated and display on the report.

Display Details

- Company name
- Engagement
- Project name
- Engagement status
- Start date
- End date
- Currency
- Month/year
- Budgeted and Actual hours
- Budgeted and Actual extended cost

- Budgeted and Actual extended billing amount

Note: If split billing is used, the report will include invoiced amounts for the phantom engagement and the main engagement.

Since time is tracked against the master engagement, only the master is available for selection. Otherwise, the report would display the invoiced amounts for the phantom engagements, but no cost information. Since that would be misleading, the master engagement displays all invoiced amounts (including amounts for phantom engagements) and all cost amounts.

- Budgeted and Actual Margin
- Variances

System-Defined Criteria

- Uses the same calculation logic as the budget vs. actual by Item report, but groups by month.
- The monthly totals will be based on the dates entered on the budget rows for expenses, products and fixed fees.
- For services, they will be based on spreading the hours across the start and finish dates, applying the billing rate to arrive at the revenue amount.
- Costs for services will be based on the dates of the time entries selected.

User-Specified Criteria

- Company name
- Engagement

Note: If split billing is used, phantom engagements are not available for selection. However, the report will include invoiced amounts for the phantom engagement and the main engagement.

- Project
- Engagement status
- Start date
- End date
- Fiscal Periods
- Currency to display
- Actual revenue and cost to use

URL

/Finance/BudgetReports/rpBudgetvsActualbyMonth.asp

Budget vs. Actual Costs by Task (With Work Code)

1. The Reports tree view can be accessed through two methods:
    *   In the Applications bar, expand the My Applications section and click **Reports**.
    *   In the Folders view, click **Folders** and select **Reports**.

    The Reports tree view opens.

2. Expand the **Budget** category and click **Budget vs. Actual Costs by Task (With Work Code)**.

    The **Budget vs. Actual Costs by Task (With Work Code)** report displays in the Details view.

Intended Audience

*   Engagement/Project Managers, Finance

Purpose

This report allows users to compare budget amounts against actual costs, and displays the work code. It provides budgeted and actual cost summaries for the different types of work (for example, application development) and expenditure type (for example, capital versus operating) being tracked.

> **Note:** The work code is specified on actuals only; work codes are not set at the budget level.

Display Details

*   Task
*   Billing Role
*   Resource
*   Work Code Category
*   Work Code
*   Budget Hours
*   Actual Hours
*   Hours Variance
*   Budget average cost rate
*   Budget Extended Cost
*   Actual Cost Rate Average
*   Actual Extended Cost
*   Cost Variance

For sections, see the System-Defined Criteria.

Note: If split billing is used, the report will include invoiced items for the phantom engagement and the main engagement.

Since time is tracked against the master engagement, only the master is available for selection. Otherwise, the report would display the invoiced items for the phantom engagements, but no cost information. Since that would be misleading, the master engagement displays all invoiced items (including amounts for phantom engagements) and all cost items.

System-Defined Criteria

- The **Engagement only** selection shows the most current revision for the engagement, sorted into sections based on type (services, product, fixed fee, expenses).

- The **Services** section, shows one row per budgeted resource/billing role combination, with all budgeted and actual information summarized.

- **Actuals** will be based on the status chosen (entered, submitted, approved or invoiced) for time.

- Time entries selected will display at that status level (for example, any time statused as entered would be entered plus submitted plus approved plus invoiced time, while approved time would be only approved plus invoiced).

- If there are **actuals and no budget**, a row shows the actual data with zero budgeted data.

- For the **Expenses** section, cost actuals are based on the status of the expense, using the same logic as time (i.e. the expense entries will be at least at the status chosen).

- For **Products**, if submitted or approved status is chosen, all products will show; if invoiced is chosen, only those products which have been invoiced will be shown. For cost, the materials table is used, and will be summarized to the product category/product. Materials have no particular status, so will be shown for all statuses chosen.

- For the **Fixed Fee** section, if the invoiced status is shown, only invoiced fixed fees will be shown for actual revenue. For entered, submitted and approved status, all fixed fees are shown. For cost, hours associated with the fixed fee will be accumulated at the chosen status (entered, submitted, approved, invoiced).

- The **Engagement and projec**t selection follow the same logic as above, except that the services section will show one row per task.

- **Actual Costs** are taken from the time table.

User-Specified Criteria

- Company name
- Engagement

Note: If split billing is used, phantom engagements are not available for selection. However, the report will include invoiced items for the phantom engagement and the main engagement.

- Project

- Actual revenue and cost to use

URL

/Finance/BudgetReports/rpBudgetvsActualCosts.asp

Budget vs. Actual for Selected Fixed Fee

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Budget** category and click **Budget vs. Actual for Selected Fixed Fee**.

   The **Budget vs. Actual for Selected Fixed Fee** report displays in the Details view.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

To show revenue broken down by fixed fee item.

Display Details

- Company

- Engagement

- Fixed fee name

- Fixed fee amount

- Engagement currency

System-Defined Criteria

- If the invoiced status is shown, only invoiced fixed fees will be shown for actual revenue.

- For "entered", "submitted", and "approved" statuses, all fixed fees will be shown for actual revenue.

- For cost, hours associated with the fixed fee will be accumulated at the chosen status (i.e. entered, submitted, approved, or invoiced).

User-Specified Criteria

- Company name

- Engagement

- Fixed Fee

- Project

  Depending on the option selected, the outcomes will differ.

- Actual revenue and cost to use

  The Budget vs. Actual for Selected Fixed Fee report uses an average of the billing rate and cost rate for the resource on the project. If the Update Time Rate scheduled job has not run, then the billing rate and cost rate will have null values, making the average of these rates less than the actual. After the job is run and proper rates are populated, the correct rate is used.

URL

/Finance/BudgetReports/rpBudgetvsActualFixedFee.asp

Exceeded Funding Source Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Budget** category and click **Exceeded Funding Source Report**.

   The selection criteria for the report display in the Details view.
3. Complete the selection criteria and click **Go**.

   The report that matches the selection criteria displays in the Details view.

Intended Audience

- Resources who have the features or roles for managing funding source associations.

Purpose

This report is lists the funding sources that have an associated demand amount or an actual spent amount that exceeds the funding amount. The calculation of exceeded amounts is applied to Effort, Revenue, and Cost. Exceeded amounts are shown in red. The report data is updated when the Financial Analysis Summary and Calculate Project Costs scheduled jobs are run.

Display Details

Funding Sources:

- Effort Amount (Funding, Total Demand, Approved Demand, Unapproved Demand, Actual)
- Revenue Amount (Funding, Total Demand, Approved Demand, Unapproved Demand, Actual)
- Cost Amount (Funding, Total Demand, Approved Demand, Unapproved Demand, Actual)
- Margin (Funding, Total Demand, Approved Demand, Unapproved Demand, Actual)

User-Specified Criteria

- Fiscal Period (for information only, not selectable)
- Fiscal Year (supports multiple selections)

- View all amounts or view exceeded amounts only

URL

/Finance/InvestmentPlanningReports/rpExceededFundingSource.aspx

Funding Source Association Exception Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Budget** category and click **Funding Source Association Exception Report**.

   The selection criteria for the report display in the Details view.
3. Complete the selection criteria and click **Go**.

   The exception report that matches the selection criteria displays in the Details view.

Intended Audience

- Resources who have the features or roles for managing funding source associations.

Purpose

This report is lists the Changepoint entities that are missing a required funding source association.

Display Details

Projects:

- Name
- Project Manager
- Associated Engagement
- Company
- Status
- Planned Hours
- Actual Hours
- Remaining Hours
- Total Hours

Opportunities:

- Description
- Company
- Budget Total
- Currency
- Status

Requests:

- Type

- Number

- Priority

- Status

- Description

User-Specified Criteria

- Entity type

- Status

- Company

- Engagement

- Created by

- Created after

CHAPTER 3
Company Management Reports

Customer Management Category

The following reports are included under Customer Management:

- "All Companies" on page 27
- "Customer Hierarchy" on page 28
- "Customer Radar" on page 28
- "Company Reference" on page 30
- "Company Financial Analysis Summary" on page 30

All Companies

Intended Audience

- All users

Purpose

This report provides a listing of companies within the system.

Display Details

Report Header

- Sales Region included in the report
- Account Types included in the report
- Company Status included in the report

Report Data

- Company (with links to company details)
- Address
- Sales Region

System-Defined Criteria

- Companies matching selection criteria

User-Specified Criteria

- Sales Region
- Account Type

- Status

URL

/Reports/rpListCompanies.asp

Customer Hierarchy

Intended Audience

- All users

Purpose

This report provides a visual representation of all the company relationships that exist within the system.

Display Details

- Company name (with links to company details)

- Level in hierarchy

System-Defined Criteria

- None

User-Specified Criteria

- None

URL

/Core/Customer/rpCustomerHierarchy.asp

Customer Radar

Intended Audience

- Sales

Purpose

This is a summary view of all information from the company report card for a selection of company. The purpose is to allow comparison of companies based on financial and other criteria including company satisfaction from Changepoint surveys.

For example, you can review results for company for a specific sales region or for a specific Sales Manager, or compare results across those areas.

You must have the View Company Radar feature to be able to view the report.

Display Details

Report Heading:

- Industry type included in the report

- Sales Region included in the report

- Account status included in the report

- Account Manager included in the report

For each company (one per row in the report):

- Company name

Financial History:

  - Total Revenue (last 12 months)

  - Gross margin %

  - Accounts Receivable

  - Average days to pay

  - Write-offs

For more information about the calculations, see the "Viewing the Report Card" section in the "Survey Results Analysis" chapter in the *Survey Management User Guide*.

Financial Outlook:

  - Number of current opportunities associated with the company

  - Revenue Forecast

Current Status:

  - Number of active projects associated with the company

  - Sales Reference (is the company a sales reference? Yes/No)

  - Customer satisfaction rating (calculated using survey data from Survey Management)

  - Account Manager

System-Defined Criteria

- Compares customers on a defined set of metrics.

- The report selects fields from the report card table based on the criteria selected.

- SAT ratings, brought in from Survey Management.

- Customers for which **Calculate report card** has been selected on the Company dialog box.

User-Specified Criteria

- Industry Type

- Sales Region

- Status (account status)

- Account Manager

URL

/reports/rpCustomerRadar.asp

Company Reference

Intended Audience

- Sales Representatives

Purpose

This report provides a list of customers that will provide references for prospects.

Display Details

- Company name (with links to company details)
- Contact name
- Phone Number
- E-mail address

System-Defined Criteria

Selects all qualified companies to which the user has access to that have been flagged as reference customers. This is displayed along with the company's reference contact, if available, complete with business phone numbers and e-mail address.

User-Specified Criteria

- None

URL

/Reports/rpListReferenceCompanies.asp

Company Financial Analysis Summary

Intended Audience

- Upper-level Management who wish to see overall profitability by client.

Purpose

This report shows monthly billing, cost and margin amounts for past and future, by company.

Display Details

- Company
- Currency
- Monthly Invoice Amount

- Monthly Cost Amount
- Monthly Margin Amount
- The bottom of the report displays the sums for the Monthly Invoice Amount, Monthly Cost Amount and the Monthly Margin Amount

System-Defined Criteria

- Date

User-Specified Criteria

- Opportunity
- Opportunity Category
- Opportunity Client Manager
- Opportunity Source
- Opportunity Status
- Company
- Company Account Manager
- Company Account Type
- Company Department Type
- Sales Representative
- Currency
- Date
- Engagement Category
- Engagement Manager
- Engagement Status
- Engagement
- Location

CHAPTER 4
Customer Relationship Management Reports

Competition Analysis Category

The following reports are included under Competition Analysis:

- "Competition by Frequency" on page 33
- "Losses by Competitor" on page 34
- "Opportunity Outcome: Won" on page 35

Competition by Frequency

Intended Audience

- Sales and Marketing Management

Purpose

This report contains the frequency at which a competitor is involved in opportunities and also contains statistics related to the win/loss ratios.

Display Details

- Competitor name (sorted alphabetically)
- Number of Opportunities (number of deals a competitor was involved in)
- Frequency (number of deals involved in divided by total number of deals with identified competitors)
- Won (percentage of Number of Win status divided by Involved in field)
- Lost (percentage of Number of Loss status divided by Involved in field)
- Other (percentage of Number of Other status divided by Involved in field)
- Bottom of report shows the total number of opportunities with identified competitors

System-Defined Criteria

- Opportunities in the system with a competitor identified and an outcome

User-Specified Criteria

- None

URL

/Reports/rpViewCompByFrequency.asp

Losses by Competitor

Intended Audience

- Sales Management

Purpose

This report provides a list of all opportunities that were lost.

Display Details

Report Header

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name

- Opportunity name

- Sales representative

- Decision date

- Revenue (converted to the user's base currency)

- Outcome details

- Competitors (chosen competitor has an asterisk, and if none are identified it will be noted as NONE)

- Total Revenue

- Currency

Users can link to information about the company, opportunity, sales rep. and the competition.

System-Defined Criteria

- Opportunities with status lost

User-Specified Criteria

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:

- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period
- Workgroups and subgroups

Click **Workgroup Filter** to select from a list of workgroups to which the user has access (or select **All**). The report displays the lost opportunities for the workgroups chosen.

Select **Include Children** to include the lost opportunities for subgroups falling under the selected workgroups in the hierarchy.

URL

/Reports/rpViewLosses.asp

Opportunity Outcome: Won

Intended Audience

- Sales Management

Purpose

This report provides a list of all opportunities that were won.

Display Details

Report Header

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name
- Opportunity name
- Sales representative
- Decision date
- Revenue (converted to the user's base currency)
- Competitors
- Total Revenue
- Currency

Users can link to information about the company, opportunity, sales rep. and the competition.

System-Defined Criteria

- Opportunities with status won

User-Specified Criteria

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period
- Workgroups and subgroups

Click **Workgroup Filter** to select from a list of workgroups to which the user has access (or select **All**). The report displays the won opportunities for the workgroups chosen.

Select **Include Children** to include the won opportunities for subgroups falling under the selected workgroups in the hierarchy.

URL

/Reports/rpViewWins.asp

Marketing Category

The following report is included under Marketing:

- "Campaign Profitability" on page 36

Campaign Profitability

Intended Audience

- Sales Managers, Marketing Managers

Purpose

This report contains a listing of leads and potential revenue versus costs for campaigns.

Display Details

- Campaign category
- Date
- Campaign name
- Total campaign cost
- Number of leads
- Leads in sales pipeline (companies with opportunities)
- Revenue potential

- Contract amount (for engagements created from the opportunities)

System-Defined Criteria

- Select campaigns that start and end within the dates chosen
- Counted the number of prospects and leads with the campaign as the source
- Counted opportunities that have "include in forecast rollup" checked and a close date within the dates chosen

User-Specified Criteria

- Currency
- Start date
- End date

URL

/Reports/rpCampaignProfit.asp

Opportunity Management Category

The following reports are included under Opportunity Management:

- "Opportunities Outcome: Lost" on page 37
- "Opportunities Outcome: Won" on page 38

Opportunities Outcome: Lost

Intended Audience

Sales Management

Purpose

This report provides a list of all opportunities that were lost.

Display Details

Report Header

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name
- Opportunity name
- Sales Representative
- Decision date

- Revenue

- Competitors (chosen competitor has an asterisk, and if none are identified it will be noted as NONE)

- Total Revenue

- Currency

Users can link to information about the company, opportunity, Sales rep. and the competition.

System-Defined Criteria

Opportunities with status lost

User-Specified Criteria

Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

Click **Workgroup Filter** to select from a list of workgroups to which the user has access (or select **All**). The report displays the lost opportunities for the workgroups chosen.

Select **Include Children** to include the lost opportunities for subgroups falling under the selected workgroups in the hierarchy.

URL

/Reports/rpViewLosses.asp

Opportunities Outcome: Won

Intended Audience

- Sales Management

Purpose

This report provides a list of all opportunities that were won.

Display Details

Report Header

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name

- Opportunity name

- Sales representative

- Decision date

- Revenue

- Competitors

- Total revenue

- Currency

Users can link to information about the company, opportunity, Sales rep. and the competition.

System-Defined Criteria

- Opportunities with status won

User-Specified Criteria

- Select **Date Range** or **Fiscal Period**

Date Range:
  - Start date
  - End date

Fiscal Period:
  - Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
  - Fiscal Year
  - Fiscal Period
- Workgroups and subgroups

Click **Department Filter** to select from a list of workgroups to which the user has access (or select **All**). The report displays the won opportunities for the workgroups chosen.

Select **Include Children** to include the won opportunities for subgroups falling under the selected workgroups in the hierarchy.

URL

/Reports/rpViewWins.asp

C H A P T E R 5
Data Archive Reports

Archiving Validation Log Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Data Archive** category and click **Archiving Validation Log**.

   The **Archiving Validation Log** report displays in the Details view.

Intended Audience

Entity managers who have flagged an entity for archiving.

Purpose of Report

For entity managers to view and/or clear the entities that they flagged for archiving but have failed validation or have been rejected by the archive administrator.

Display Details

- Entity Name—Name of the entity
- Delete—check box that, when selected, will clear the entity from the report when the report is saved.
- Entity Type—CUS (company), ENG (engagement), or PRJ (project)
- Rejection Reason—the reason that the entity failed validation. This column should contain enough information for the entity manager and archive administrator to solve the issue through Enterprise.
- Selected By—the entity manager who initiated the archive process
- Validated On—the date that the validation scheduled job was run

System-Defined Criteria

Entities that the current user flagged for archiving but have failed validation or have been rejected by the archive administrator.

User-Specified Criteria

None.

URL

/Reports/ArchiveValidationLog.aspx

Archiving Log Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Data Archive** category and click **Archiving Log**.

   The **Archiving Log** report displays in the Details view.

Intended Audience

Entity managers who have flagged an entity for archiving.

Purpose of Report

To list the entities that have been successfully archived and removed from the production database.

Display Details

- Entity Name—Name of the entity.
- Entity Type—Company, Engagement or Project, depending on the archived entity.
- Archiving Date—the date that the archive scheduled job is run.

System-Defined Criteria

The entities that have been successfully archived and removed from the production database after the archive scheduled job has run.

User-Specified Criteria

None.

URL

/Reports/ArchiveLog.aspx

C H A P T E R   6
Engagement Management Reports

Engagement Management Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **Engagement Management** category.

   The following reports are included under the **Engagement Management** category:
   - "All Engagements by Company" on page 43
   - "Engagement Financial Analysis" on page 44
   - "Engagements by Manager" on page 47
   - "Engagement Workload" on page 48
   - "Work in Progress Report" on page 49

All Engagements by Company

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Engagement Management** category and click **All Engagements by Company**.

   The **All Engagements by Company** report displays in the Details view.

Intended Audience

- Engagement Managers, Project Managers, Finance, Sales Personnel

Purpose

This report provides a listing of engagements, filtered by billing office and engagement status, for selected companies.

Display Details

Report Heading:

- Billing Offices included in the report
- Companies included in the report
- Engagement status included in the report

For each engagement:

- Company name

- Engagement name

- Engagement status

System-Defined Criteria

- Sorted by company name and engagement name

User-Specified Criteria

- Billing Office

- Company

- Engagement status

URL

/Reports/rpDisplayCompanies.asp

Engagement Financial Analysis

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Engagement Management** category and click **Engagement Financial Analysis**.

   The **Engagement Financial Analysis** report displays in the Details view.

Intended Audience

- Engagement Managers, Finance, Directors

Purpose

This report shows revenues and cost details of a selected engagement.

Display Details

- Month: (calendar month)

- **Direct Costs Section:**
  - Invoiced Amount: Invoiced amount for time, request time, expenses, fixed fees, products and additional items, write-offs and adjustments (the "total adjustment" field on the time, expense and additional items on an invoice), excluding taxes, converted to the selected currency. Records included from the invoice table for invoices with

Approved, Committed, Sent, Partial Paid, Paid or Archived status. Groupings per month will be based on the invoice date.

- Labor: Labor cost associated with the invoiced amounts (see the invoiced amount section above). Selects time associated with each invoice from the time table, applies the hourly cost from the time table to the hours and converts to the selected currency. For a daily engagement, the daily cost is divided by the resource's hours per day (or by 8, if that is not populated) to get an hourly rate. The cost of overtime hours per the "overtime cost rules" as outlined below is also included. If fixed fee time was selected on an invoice, the cost for the fixed fee time will be included once the associated fixed fee has been invoiced. Groupings per month will be based on the invoice date of the associated invoice on which the record was selected.

- Expenses: expense cost associated with the invoiced amounts (see invoiced amounts section, above). Selects expenses associated with each invoice from the **invoiced expense** table. Takes the "expense amount" in the expense currency, (which is net of recoverable taxes) and converts to the selected currency. Groupings per month will be based on the invoice date of the associated invoice.

- Products

- Cost of invoiced product. Retrieves the product list from the **Invoiced Product** table for the selected engagement, for products which are associated with Approved, Committed, Sent, Partial Paid, Paid or Archived invoices. If materials transactions exist for the product, the costs of the material transactions should be included for each month, converted to the selected currency. If materials transactions do not exist for the product, use the cost from the engagement product (converted to the selected currency) multiplied by the invoiced quantity. Groupings per month will be based on the invoice date of the associated invoice. Costs for material transactions will only appear if the associated product has been invoiced.

- **Unbillable Costs Section:**
  - Labor (cost of approved, unbillable time for each month): Selects approved time associated with unbillable tasks. Takes the hourly cost in the time table, converts to the selected currency and multiplies by the number of hours. The cost of unbillable overtime hours per the "overtime cost rules" as outlined below is included. For a daily engagement, the daily cost is divided by the resource's hours per day (or by 8, if that is not populated) to get an hourly rate. Groupings per month will be based on the time date. Note: a fixed fee task may be marked as unbillable. In that case, the time will appear in the unbillable costs section, and it will not be necessary to select it on an invoice.

  - Expenses: Cost of approved, unbillable expenses for each month, converted to the selected currency. From the Expense table, it is the "Quantity" * "UnitPrice" in the expense currency, net of recoverable taxes, and converted to the selected currency. Groupings per month will be based on the expense date.

  - Products: Cost of material transactions for any products not included in the billed products total (see product cost section, above). From the material table, it is the quantity * unit cost in the material currency and converted to the selected currency, for any productid that is not in the **invoicedproduct** table for the engagement. Groupings per month will be based on the material date.

  - Margin Value: should be invoiced amount minus labor, expenses, products, unbillable labor, unbillable expenses and unbillable products.

Overtime cost will be determined as follows:

Scenario 1 – The Resource Cost Rate setting is specified on the Billing Office

- If the Resource only is specified on the engagement billing rates dialog box and the resource only (no billing role) is specified on the task assignment, then the engagement overtime cost rate entered for the resource on the engagement billing rates tab is used as the overtime cost rate.

- If both the resource and billing role are specified on the engagement billing rates dialog box and on the task assignment, then the engagement overtime cost rate entered for the resource and billing role combination on the engagement billing rates tab is used as the overtime cost rate.

- If only the billing role is specified on the engagement billing tab and the resource and role are specified on the task assignment, then the overtime cost rate on the Resource Profile is used (with no multiplier).

- If only the billing role is specified on the engagement billing rates dialog box (i.e., no resource), and only the resource is specified on the task assignment (i.e., no billing role), then the overtime cost rate on the Resource Profile is used (with no multiplier).

- If the engagement billing rates dialog box is left blank (i.e., no billing role or resource is specified), and therefore no billing role is identified on the task assignment, then the overtime cost rate on the Resource Profile is used (with no multiplier).

Scenario 2 – The Billing Role Cost Rate setting is specified on the Billing Office

- If the Resource only is specified on the engagement billing rates dialog box and the resource only (no billing role) is specified on the task assignment, then the engagement overtime cost rate entered for the resource is used as the overtime cost rate.

- If both the resource and billing role are specified on the engagement billing rates dialog box and on the task assignment, then the engagement cost rate entered for the resource and role combination is used as the overtime cost rate.

- If only the billing role is specified on the engagement billing rates dialog box, and the resource and role are specified on the task assignment, then the engagement overtime cost rate entered for the Billing Role is used.

- If only the billing role is specified on the engagement billing rates dialog box, and only the resource is specified on the task assignment (i.e., no billing role), then the cost rate and overtime cost rate is used (with no multiplier).

- If the engagement billing rates dialog box is left blank (i.e., no billing role or resource is specified), and therefore no billing role can be identified on the task assignment, then the zero cost rate and the zero overtime cost rate is used.

User-Specified Criteria

- Company
- Engagement
- Fiscal Period or Date Range

Fiscal Period

- Fiscal Period Selection
- Fiscal Year
- Fiscal Period

Date Range

- Start Date

- End Date

> **Note:** If the fiscal period or the date range, the report displays the data monthly.

- Currency

- Include request time

- Include cost of non-invoiced items

URL

/Reports/rpEngagementProfit.asp

Engagements by Manager

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Engagement Management** category and click **Engagements by Manager**.

   The report displays in the Details view.

Intended Audience

- Engagement Managers, Finance, Resource Managers

Purpose

This report contains a full listing of selected engagements with pertinent data on each engagement. Engagements displayed are filtered by workgroup, Engagement Manager and engagement status.

Display Details

Report Heading:

- Workgroups included in the report

- Resource names - which Engagement Managers are included in the report

- Engagement status included in the report

For each engagement:

- Engagement manager

- Contract number

- Date created

- Last updated

- Company name

- Engagement

- Industry Type
- Contract amount
- Consulting start date
- Engagement status
- Description

System-Defined Criteria

- Sort by Engagement Manager

User-Specified Criteria

- Workgroup
- Resource name (Engagement Manager)
- Engagement status

URL

/Reports/rpPipeline.asp

Engagement Workload

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Engagement Management** category and click **Engagement Workload**.

   The **Engagement Workload** report displays in the Details view.

Intended Audience

- Engagement Managers, Resource Managers, Staffing Personnel

Purpose

This report lists future staffing requirements, based on forecasted engagement requirements.

Display Details

- **Bench Report** – list of all resources with no engagement assignments within the specified period (that is, if they are on the "bench" and hence available for new assignments)
- **Future Assignment Report** – list of all engagement assignments that are not assigned
- **Staffing Positions Report** – list of projected resource requests for all engagements within a specified period (whether the position has been assigned or is still open)

System-Defined Criteria

- Forecast information from the Projected Resources section of the Engagement dialog box.

User-Specified Criteria

- Global Workgroup (division)

- Workgroup (department)

- Start date

- One of:
  - Bench report
  - Future assignments report
  - Staffing positions report

URL

/Reports/rpRollOffEntry.asp

Work in Progress Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Engagement Management** category and click **Work in Progress**.
   The **Work in Progress** report displays in the Details view.

Intended Audience

- Engagement Managers, Project Managers, Finance

Purpose

The Work In Progress report provides cost and revenue information for a selected engagement.

Display Details

Report Header

- Report date

- Company name

- Engagement name

- Industry Type (from the company)

- Sales Representative (from the company)

- Engagement Category (from the engagement)

- Contract Amount (from the engagement)

- Start Date (as selected on the report)

- End Date (as selected on the report)

Cost Accumulation section

- Project name
- Task name
- Resource name
- Average cost rate
- Hours
- (Extended) Labor cost
- Total hours
- Total labor cost

See System-Defined Criteria for details.

Cost Accumulation – Expenses section

- Project Name
- Resource Name
- Expense Cost
- Total expenses

See the System-Defined Criteria for details.

Revenue (for time and expenses billable tasks, excluding fixed fees)

- Project name
- Task name
- Resource name
- Average hourly rate
- Actual hours
- Revenue
- Total hours
- Total revenue

See the System-Defined Criteria for details.

Fixed Fee Realization

- Deliverable
- Billing amount
- Billing date
- Billed
- Hours worked
- Realization
- Total hours
- Total billing amount

See System-Defined Criteria for details.

Invoice Information section

- Invoice number

- Invoice date

- Invoice amount

  If split billing is used, the report will include invoiced amounts for the phantom engagement and the main engagement.

  Since time is tracked against the master engagement, only the master is available for selection. Otherwise, the report would display the invoiced amounts for the phantom engagements, but no cost information. Since that would be misleading, the master engagement displays all invoiced amounts (including amounts for phantom engagements) and all cost amounts.

- Amount outstanding (invoice amount **–** payment amounts)

- Days outstanding

See the System-Defined Criteria for details.

System-Defined Criteria

- **Cost accumulation** section

  Selects all the time records that are at Actual status (as specified in System Manager) and for which the time dates fall into the period selected for the report, grouped by project and task. The report uses the cost rates (converted to the engagement currency based on today's date) as populated in the time table by the UpdateTimeRates job for the selected time records to determine cost. Average cost rate is calculated by summing the extended cost (hours multiplied by rate) and dividing by the sum of the hours. For Daily or Mixed Fixed Fee/Daily engagements, the cost rate is divided by the resource's hours per day (or by 8, if that is not populated) to arrive at an hourly rate.

  For example: Oct. 2 1 hour 60.00 cost

  Oct. 3 1 hour 60.00 cost

  Oct. 4 3 hours 75.00 cost

  If the report was run for Oct. 2-4, it would show 5 hours and a rate of 69.00. If it was run for October 4-4, it would show 3 hours and 75.00 cost.

  If **Include overtime hours** is selected in the Engagement Billing Rates dialog box, overtime hours are also included in the cost, and rates are determined based on either the billing role, resource, or combination of the two that are specified in the engagement and task (see the "Overtime Cost Rates" section on page 52 and the "Overtime Billing" section on page 53).

  Note: If the cost rate is not in the time table (i.e. null) there will be two rows for the task: one with hours and a 0 rate, and one with the hours and the average rate of all the records that have a cost rate. For more information on how rates are populated into the time table, see the "Billing Offices" section in the "Financial Management" chapterin the *System Manager Administration Guide*.

- **Cost accumulation – Expenses** section:

  Selects approved expense records for which the expense dates fall into the period selected for the report, converted to the engagement currency based on the expense date and grouped by project and resource.

- **Revenue (for time and expenses billable tasks, excluding fixed fees)** section

  Selects all the time records that are at Actual status (as specified in System Manager) and that have a time date within the date range selected and that are billable and not associated with a fixed fee. For each task/resource, the system takes the hourly billing rate from the time table (converted to the engagement currency based on the time date) and multiplies by the number of hours to arrive at total revenue entered (but not necessarily invoiced) for the date range selected. The billing rates are updated in the time table by the UpdateTimeRates job, and the same rules apply as in the cost accumulation section, i.e. if different billing rates are found for the same resource/task, a blended rate will be displayed, and if no billing rate is found, a separate row with the hours and a zero rate will be displayed. See the Cost Accumulation section, above, for more details. For Daily or Mixed Fixed Fee/Daily engagements, the billing rate is divided by the resource's hours per day (or by 8, if it is not populated) to arrive at an hourly rate.

  If **Include overtime hours** is selected in the Engagement Billing Rates dialog box, overtime hours are also included in the cost, and rates are determined based on either the billing role, resource, or a combination of the two that are specified in the engagement and task (see the "Overtime Cost Rates" section on page 52 and the "Overtime Billing" section on page 53).

- **Fixed Fee Realization** section:

  Selects fixed fee deliverables with a billing date within the date range selected. For each fixed fee deliverable, selects all time that is at the Actual status (as specified in System Manager) for tasks associated with the fixed fees and divides the fixed fee billing amount by the number of hours to arrive at a realized billing rate.

  The purpose of this section is to allow a comparison of the realized billing rate for the fixed fee with the billing rates for billable tasks.

- All hours are used in the calculation, not only hours within the date range selected.

- **Invoice Information** section:

  Selects invoices that have invoice dates that are within the date range selected and are at Committed, Sent, Partial Paid, Paid or Archived status.

Overtime Cost Rates

Overtime cost rates are determined as follows.

> **Note:** Overtime hours will only be considered if the **Include overtime hours** check box in the Engagement Billing Rates dialog box is selected.

Scenario 1—The Resource Cost Rate setting is specified for the Billing Office:

- If the resource only is specified in the Engagement Billing Rates dialog box and the resource only (no billing role) is specified in the task assignment, the engagement cost rate entered for the resource in the Engagement Billing Rates dialog box multiplied by the engagement overtime percentage is used as the overtime cost rate.

- If both the resource and billing role are specified in the Engagement Billing Rates dialog box and in the task assignment, the engagement cost rate entered for the resource and billing role combination in the Engagement Billing Rates dialog box, multiplied by the engagement overtime percentage, is used as the overtime cost rate.

- If only the billing role is specified in the Engagement Billing Rates dialog box and the resource and billing role are specified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

- If only the billing role is specified in the Engagement Billing Rates dialog box (i.e., no resource), and only the resource is specified in the task assignment (i.e., no billing role), the overtime cost rate in the Resource Profile is used (with no multiplier).

- If the Engagement Billing Rates dialog box is left blank (i.e., no billing role or resource is specified), and therefore no billing role is identified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

Scenario 2—The Billing Role Cost Rate setting is specified for the Billing Office

- If the resource only is specified in the Engagement Billing Rates dialog box and the resource only (no billing role) is specified in the task assignment, the engagement overtime cost rate entered for the resource is used as the overtime cost rate.

- If both the resource and billing role are specified in the Engagement Billing Rates dialog box and in the task assignment, the engagement overtime cost rate entered for the resource and billing role combination is used as the overtime cost rate.

- If only the billing role is specified in the Engagement Billing Rates dialog box, and the resource and billing role are specified in the task assignment, the engagement overtime cost rate entered for the Billing Role is used.

- If only the billing role (i.e., no resource) is specified in the Engagement Billing Rates dialog box, and only the resource is specified in the task assignment (i.e., no billing role), the zero overtime cost rate is used.

- If the Engagement Billing Rates dialog box is left blank (i.e., no billing role or resource is specified), and therefore no billing role can be identified in the task assignment, the zero overtime cost rate is used.

Overtime Billing

Overtime billing rates are determined by the Include overtime hours check box Engagement Billing Rates dialog box. If selected, the system will use all time entered to the overtime bucket based on the percentage entered using the following formula:

Overtime Billing Rate = Regular Time Billing Rate (from the time table)* Overtime percentage/100

The overtime billing rate is the billing rate in the time table multiplied by the overtime percentage.

For example:

> Regular rate is $200 / hour
>
> If 100.00% was entered, then overtime would be billed at $200 / hour
>
> If 150.00% was entered, then overtime would be billed at $300 / hour
>
> If 0.00% was entered, then overtime would be billed at $0 / hour

If **Include overtime hours** is not selected, then NO overtime hours will be used.

Note: The **Overtime Billing Rate** field on a Resource Profile is not used. It is ignored in billing calculations and standard reports, with one exception. Within our OLAP cubes the overtime billing rate measure uses this value.

User-Specified Criteria

- Company name

- Start date

- End date

- Engagement

> **Note:** If split billing is used, phantom engagements are not available for selection. However, the report will include invoiced amounts for the phantom engagement and the main engagement.

URL

/Reports/rpWorkInProgress1.asp

Performance Management Reports

Performance Management Category

The following reports are included under the Performance Management category:

- "Project Portfolio Lifecycle Report" on page 55
- "Assignment by Metric" on page 56
- "Assignment by Workgroup" on page 57
- "Metric Assignments" on page 57

Project Portfolio Lifecycle Report

Intended Audience

Engagement Managers, Project Managers

Purpose

Combines project portfolio cost metric results with information from the opportunity that contains the original estimates for the project, as well as the request that contains the original estimates for the opportunity.

Display Details

- Portfolio name
- Portfolio currency
- Project
- Metric
- Target Numeric
- Actual Numeric
- Variance
- Status
- Related Opportunity
- Opportunity Currency
- Opportunity Estimated Effort
- Opportunity Total Cost
- Related Request Number
- Request Estimated Effort

- Request Total Cost

System-Defined Criteria

- Metric type

User-Specified Criteria

- Company
- Engagement
- Metric
- Portfolio
- Portfolio category
- Project

Assignment by Metric

Intended Audience

- Individual Performance Management (IPM) Administrator and IPM Workgroup Administrator

Purpose

This is an administrative report listing resources assigned to metrics, for a specified IPM period. The list is grouped by metrics.

Display Details

- Metric name
- Name of the resource assigned to the metric
- Assigned on (date)
- Assigned (check mark if the user is assigned to the metric, x if the user is not assigned)
- Inputs to (check mark if the user is assigned to provide inputs to calculate the result, x if not)
- Workgroups included in the report (click **Included Workgroup** to view)

System-Defined Criteria

- Selects metrics assigned to resources for the specified IPM period, sorted by metric.
- Displays only resources that the user has access to, based on workgroups (features).

User-Specified Criteria

- IPM period

URL

/IPI/reports/vwMAssignmentByMetric.asp

Assignment by Workgroup

Intended Audience

- Individual Performance Improvement (IPM) Administrator and IPM Workgroup Administrator

Purpose

This is an administrative report listing resources assigned to metrics, for a specified IPM period. The list is grouped by workgroup, then by resource.

Display Details

- Workgroup
- Resource name
- Metric name
- Metric category
- Team Metric (check mark for yes, x for no)
- Assigned on (date)
- Workgroups included in the report (click **Included Workgroup** to view)

System-Defined Criteria

- Selects metrics assigned to resources for the specified IPM period, sorted by workgroup, then sorted by resource.
- Displays only resources that the user has access to, based on workgroups (features).

User-Specified Criteria

- IPM period

URL

/IPI/reports/vwMetricByWorkgroupNResourc.asp

Metric Assignments

Intended Audience

- Individual Performance Improvement (IPM) Administrator and IPM Workgroup Administrator

Purpose

This report lists metric assignments for the specified IPM period.

Display Details

- Metric Template used to create metric

- Metric name

- Metric category

- Workgroup

- Name of Resource assigned to the metric

- Team Metric (check mark for yes, x for no)

- Workgroups included in the report (click **Included Workgroup** to view)

System-Defined Criteria

- All assigned metrics for the specified IPM period

User-Specified Criteria

- IPM period

URL

/IPI/reports/rpMetricAssignByWorkgroup.asp

CHAPTER 8
Personal Reports

Personal Reports Category

The following reports are included under Personal Reports:

Employee Phone List

Intended Audience

- Internal Resources

Purpose

This report provides a list of all employee phone numbers in the system.

Display Details

- Extension
- Last name
- First name
- Business phone number
- Mobile number
- Pager number
- Home phone number

Users can sort on each column

System-Defined Criteria

• All Enterprise users in the system

User-Specified Criteria

• None

URL

/reports/rpphonenumbers.asp

Employee Phone List by Workgroup

Intended Audience

• Internal Resources

Purpose

This report provides a list of all employee phone numbers in the system by workgroup.

Display Details

• Workgroup
  • Ext. (Extension)
  • Last Name
  • First Name
  • Business Phone number
  • Mobile number
  • Pager number
  • Home Phone number

  Note: Users can sort on each column

System-Defined Criteria

• All Enterprise users in the system

User-Specified Criteria

• None

URL

/reports/rpphonenumbersbyworkgroup.asp

Expense Reports Approved/Rejected by Me

Intended Audience

• Expense Approvers

Purpose

This report allows a user to print expense reports for any Changepoint resource (including those only using Changepoint Contractor) which were approved by the user producing the report.

Display Details

This report is sorted by:

• Resource, alphabetically

Each expense report is listed by:

• Number

• Amount

• Status

• Engagement

• Company name

• Date of creation

System-Defined Criteria

• Any expense report at any status for which the user has expense approval rights

User-Specified Criteria

• None

URL

/core/report/rpExpenseReportsApprovedByMe.asp

My Contacts

Intended Audience

• Internal Resources

Purpose

This report provides a list of a user's contacts in the system.

Display Details

- Last Name

- First Name

- Company name

- Business Phone

- E-mail

System-Defined Criteria

- Contact Name with the "My Contacts" flag

- Filtered by resource (the user who has run the report)

User-Specified Criteria

- As long as a resource has flagged a contact profile with a "My contacts" flag, the contact will appear on this list

URL

/Reports/rpContactList.asp

My Expense Reports

Intended Audience

- Internal Resources

Purpose

This report allows a user to print his/her own expense reports, regardless of status.

Display Details

- Expense status

- Expense report number

- Company name

- Engagement

- Comments

- Amount Total

- Date of creation

Click a link to move to:

- Report
- Company
- Engagement

The report displays the dollar value of each expense report in the resource's home currency.

System-Defined Criteria

- All Expense Reports for the resource, grouped by expense report status

User-Specified Criteria

- None

URL

/Core/Report/rpMyExpenseReports.asp

My Knowledge Items

Intended Audience

- Internal Resources

Purpose

This report provides a list of knowledge items created by a resource.

Display Details

- Version number of knowledge item
- Title
- Category
- Subcategory
- Date last modified
- Resource name that checked-out the knowledge item
- Description

System-Defined Criteria

- Knowledge items created by the resource.

User-Specified Criteria

- None

URL

/Reports/rpMyKnowledgeDocs.asp

My Checked-Out Knowledge Items

Intended Audience

Resources

Purpose

To show resources all knowledge items that they have currently checked-out.

Display Details

- Version number of knowledge item
- Title
- Category
- Subcategory
- Date checked-out

System-Defined Criteria

Knowledge items checked-out by user running the report.

User-Defined Criteria

None

URL

/KnowledgeMgmt/uiKnowledgeCheckout.asp

My Tasks

Intended Audience

- Resources, Project Managers

Purpose

This report is a listing of a resource's completed, outstanding, and uncompleted tasks. This report can be accessed from the reports listing or from a resource search on the resource workload page.

Display Details

- Project name
- Task name
- Task status icon (if status is required)
- Planned start date
- Planned finish date
- Planned hours (set out by Project Manager)
- Actual start (when resource first puts time on the task)
- Actual finish date
- Actual hours spent

- Forecast start date

- Forecast finish date (when it is due to be completed, as specified by the resource)

- Forecast/Remaining hours

- Total planned hours

- Total actual hours

- Total forecast/remaining hours

System-Defined Criteria

- All tasks assigned to a resource (selected or accessing, depending on scenario), that have not been marked complete

User-Specified Criteria

The report can be run in three ways depending on the desired outcome:

Click the **Actions** menu and select:

- **Details** to generate a report of tasks in progress
- **To-Do List** to generate a report of upcoming tasks
- **Completed Tasks** to generate a report of completed tasks

URL

/reports/rptasklist.asp

Personal Vacation Time

Intended Audience

- Internal Resources

Purpose

This report provides a record of all vacation time for the current calendar year for the resource running the report.

Display Details

- Resource name

- Calendar year of the display

- Hours taken (submitted)

- Allowance (obtained from the resource profile)

- Remaining hours (Remaining hours = Allowance - Hours taken)

System-Defined Criteria

- All non-project time that has been stored in the system marked with the flag "personal vacation task" and the time has been approved.

User-Specified Criteria

• None

URL

/reports/rpvacationreportforresource.asp

Unsubmitted Time

Intended Audience

• Internal Resources

Purpose

This report provides a view of all un-submitted time for each project, as well as non-project time.

Display Details

• Project
• Task
• Date entered
• Regular hours
• Overtime hours

Users can access the project or task profile from this report

System-Defined Criteria

• All unsubmitted time records by a specific resource

User-Specified Criteria

• None

URL

/Core/Forms/frUnsubmittedTime.asp

Weekly Time Sheet

Intended Audience

• Internal Resources

Purpose

This report provides the user with all weekly time sheets.

Display Details

- Project name

- Task name

- Hours entered by day of the week

- Total hours for the week

System-Defined Criteria

- All time entered for the selected date range for all clients, saved, but not necessarily submitted

User-Specified Criteria

- Date

URL

/Reports/rpWeeklyTimeSheet.asp

CHAPTER 9
Project Management Reports

Project Management Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **Project Management** category.

   The following reports are included under the **Project Management** category:
   - "Create Quick Plan" on page 69
   - "Earned Value Report" on page 70
   - "Inter-Project Dependencies" on page 72
   - "Milestone Report" on page 73
   - "Task Completion" on page 74
   - "Progress by Project" on page 75
   - "Project Progress All" on page 76
   - "Task Slippage by Project" on page 77
   - "Project Status by Phase" on page 78
   - "Project Summary by Resource" on page 79
   - "Projects by Status and Customer" on page 80
   - "Projects by Status and Project Manager" on page 81
   - "Resource Functions" on page 82
   - "Resources by Task" on page 83
   - "Task Status Compliance" on page 84
   - "Tasks in Progress or Scheduled to Start" on page 85
   - "Tasks Scheduled to Finish in Two Weeks" on page 86

Create Quick Plan

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Project Management** category and click **Create Quick Plan**.

   The **Create Quick Plan** report displays in the Details view.

For information about running the **Create Quick Plan** report, see the "Creating Quick Plans and Projects" chapter in the *Engagement Management User Guide*.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report provides a quick and simple way to set up all required records so that time can be entered promptly. An engagement, project, and task can all be created from one entry screen.

Display Details

For specific details, see the "Creating Quick Plans and Projects" chapter in the *Engagement Management User Guide.*

System-Defined Criteria

None

User-Specified Criteria

- Engagement information
- Project information
- Task information

URL

/Reports/rpCreateQuickPlan.asp

Earned Value Report

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Earned Value Report**.

   The **Earned Value Report** displays in the Details view.

Intended Audience

- Project Managers

Purpose

This report allows users to see the status of a project based on various earned value metrics. It also gives the capability to save multiple baselines for the project, storing critical information that can be reviewed at any time.

Earned value is a measure of the cost of work performed up to the status date or today's date. Earned value uses your original cost estimates saved with a baseline and your actual work to date to show whether the actual costs incurred are on budget. In other words, earned value indicates how much of the budget should have been spent, in view of the amount of work done

so far, and the baseline cost for the task, assignment, or resource. Earned value is also referred to as Budgeted Cost of Work Performed (BCWP).

Display Details

- Project name
- Report Date
- Unit (choose between hours or days)
- Filter by (choose department name or "All")
- WBS number
- Work packages
- Total:
  - Baseline (displays in selected unit)
  - Actual hours or days to date (displays in the selected unit)
  - Remaining hours or days (displays in the selected unit)
  - Percentage complete
  - Percentage schedule
  - Adjustment
- Earned Value:
  - BCWP—Budgeted Cost of Work Performed, through the project status date. BCWP is the portion of the cost that is planned to be spent on a task between the task's start date and the status date. For example, the total planned budget for a 4-day task is $100 and it starts on a Monday. If the status date is set to the following Wednesday, the BCWS is $75.
  - BCWP indicates how much of the budget should have been spent, in view of the amount of work performed so far and the baseline cost for the task, assignment, or resource. BCWP is calculated as the cumulative value of the timephased (i.e., spread out over the time period) percent complete for tasks (or the timephased percent work complete for assignments and resources), multiplied by the timephased baseline cost for the task, assignment, or resource, up to the status date or today's date. BCWP is also referred to as "earned value."
- ACWP—Actual Cost of Work Performed, through the project status date. It shows actual costs incurred for work already performed by a resource on a task, up to the project status date.

  ACWP is the total actual cost incurred while performing work on a task during a given period. For example, if the 4-day task actually incurs a total cost of $35 during each of the first 2 days, the ACWP for this period is $70 (but the BCWS is still $60).
- BCWS—Budgeted Cost of Work Scheduled, through the project status date. It is the percentage of the budget that should have been spent for a given percentage of work performed on a task. For example, if after 2 days 60% of the work on a task has been completed, you might expect to have spent 60% of the total task budget, or $60.

- CPI BCWP/ACWP

    Cost Performance Index (CPI) is the ratio of budgeted, or baseline, costs of work performed to actual costs of work performed (i.e., the ratio of budgeted costs to actual costs, CPI = BCWP/ACWP).

    The cumulative CPI, which is the sum of the BCWP for all tasks divided by the sum of the actual costs of work performed ACWP for all tasks, is often used to predict whether a project will go over budget and by how much.

- SPI BCWP/BCWS

    Schedule Performance Index (SPI) is the ratio of work performed to work scheduled (SPI=BCWP/BCWS), which is often used to estimate the project completion date.

- Forecasted CPI

- Forecasted Combined

System-Defined Criteria

- Project ID that relates to the Project table.

- Date the report was baselined.

- Resource ID of the user that baselined the report, relating to the Resource table

- Unit, that is, a single character that identifies units of days ("D") or hours ("H"). All units are stored in hours, but are divided by eight if this value is days.

- Total baseline hours of the project.

- Total actual hours calculated from the report.

- Percent complete taken from the report.

- Percent scheduled taken from the report.

User-Specified Criteria

- Include Subproject Information

- Company name

- Project name

- Date

    Once the criteria are entered, click **Go** to generate the report. The report can be saved, and a history of each version of the report can be displayed.

URL

/Reports/uiEVSelect.asp

Inter-Project Dependencies

Intended Audience

- Project Managers, Engagement Managers

Purpose

A Gantt-format report showing dependencies between projects.

Display Details

The report is a Gantt chart that visually shows which projects and tasks are related.

The Inter-Project Dependencies Gantt chart uses the Parent Request field on the Request profile and the Request field on the Task profile to build and display the inter-project relationships if the Dependency Type is set to **Based on requirements relationship**.

It uses the tasks listed in the Affected Tasks and Parent Tasks tabs on the Create Task Dependency dialog to build and display the inter-project relationships if the Dependency Type is set to **Based on task relationships**.

System-Defined Criteria

None

User-Specified Criteria

* Dependency Type
* Summarization Options (where you specify what to display on the report)
* CP Project Type
* Project Status
* Project
* Fiscal Period or Date Range

URL

/Reports/rpInterPrjDependencies.aspx

Milestone Report

1. The Reports tree view can be accessed through two methods:
   * In the Applications bar, expand the My Applications section and click **Reports**.
   * In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Project Management** category and click **Milestone Report**.
   The Milestone Report displays.

Intended Audience

* Project Managers

Purpose

This report allows users to see information about milestone task for projects.

Display Details

- Project Name

- Task Name

- Task Description

- Completed (Yes/No)

- Phase

- Actual Finish

- Planned Finish

System-Defined Criteria

- Tasks marked as milestones task in the edit task screen.

User-Specified Criteria

- Project (mandatory)

- Completed (optional)

Task Completion

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Task Completion**.

   The **Task Completion** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report lists completed and the status to completion of tasks by project.

Display Details

- Project name

- Project Manager

- Report Date

- Resource name

- Completed tasks

- Planned finish date

- Actual finish date

- Variance in days (late)
- Planned hours
- Actual hours
- Variance in hours

System-Defined Criteria

- Sorted by task name
  Only projects that the user is the manager or co-manager of are selected.
- Sorted by resource name for all tasks
- Scheduled Variance = Actual + Remaining - Planned

User-Specified Criteria

- Project name
- Include subproject information

URL

/Reports/rpProjectCompletion.asp

Progress by Project

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Project Management** category and click **Project Progress**.
   The **Project Progress** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report contains the details of planned, forecast and actual hours and dates for all tasks for a project.

Display Details

- Project name
- Project Manager
- Report date
- Task name
- Resource name

- Planned start date

- Planned finish date

- Planned hours

- Actual start date

- Actual finish date

- Actual hours

- Remaining hours

- Total hours

- Percent complete

System-Defined Criteria

- Only projects that the user is the manager or co-manager for selection are listed

- Calculate the total hours (actual plus remaining)

User-Specified Criteria

- Project name

- Include subproject information

URL

/Reports/rpProjectProgress.asp

Project Progress All

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Project Progress All**.

   The **Project Progress All** report displays in the Details view.

Intended Audience

- Project and Engagement Managers

Purpose

This report contains the details of planned, forecast and actual hours and dates for all tasks for all projects.

Display Details

Report Header

- Companies included in this report

- Projects included in this report

Report Data

- Project name
- Task name
- Resource name
- Actual start date
- Actual finish date
- Forecast finish date
- Planned finish date
- Planned hours
- Actual hours
- Remaining hours
- Total hours
- Percent complete
- Total hours for the project (total of all resource hours)

System-Defined Criteria

- List of all projects for selection

User-Specified Criteria

- Company name
- Project name
- Include subproject information

URL

/Reports/rpProjectSummaryProject.asp

Task Slippage by Project

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Task Slippage by Project**.

   The **Task Slippage by Project** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report displays task slippage for a specified project.

Display Details

- Project name
- Project Manager
- Project planned finish date
- Resource name
- Task name
- Task planned finish date
- Task forecast finish date
- Slippage (in days)

System-Defined Criteria

- Only projects for which the user is the manager or co-manager are listed
- Calculate slippage in days (forecast finish minus planned finish)

User-Specified Criteria

- Project name

URL

/Reports/rpProjectSlippage.asp

Project Status by Phase

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Project Status by Phase**.

   The **Project Status by Phase** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report shows projects sorted by each project phase with status information for that phase.

Display Details

- Project name

- Project phase

- Planned start date (earliest planned start date for tasks associated to that phase)

- Planned finish date (latest planned finish date for tasks associated to that phase)

- Planned hours

- Forecast start date

- Forecast finish date

- Actual hours

- Remaining hours

- Total hours

- Percent complete

System-Defined Criteria

- Only projects for which the user is the manager or co-manager are listed

- Calculate the total hours (actual plus remaining)

- Calculated Percent Complete shows the percentage of actual hours divided by total hours

- Sorted by project then project phase

User-Specified Criteria

- Company name

- Engagement name

- Project name

URL

/Reports/rpProStatusbyPhase.aspx

Project Summary by Resource

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Project Summary by Resource**.

   The **Project Summary by Resource** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report contains a listing of project tasks sorted by resource with status information.

Display Details

- Project name
- Project Manager
- Resource name
- Task name
- Actual start date
- Actual finish date
- Forecast finish date
- Planned finish date
- Planned hours
- Actual hours
- Remaining hours
- Total hours
- Percent complete

System-Defined Criteria

- Only projects for which the user is the manager or co-manager are listed
- Calculate the total hours (actual plus remaining)
- Sorted by resource name then task name

User-Specified Criteria

- Project name

URL

/Reports/rpProjectSummaryResource.asp

Projects by Status and Customer

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Projects by Status and Customer**.

   The **Projects by Status and Customer** report displays in the Details view.

Intended Audience

- Project and Engagement Managers, Finance

Purpose

This report contains an listing of projects in the system for the selected company and selected project status.

Display Details

Report Header

- Companies included in this report
- Project status included in this report

Report Data

- Company name
- Project name
- Project Manager
- Project status
- Engagement name

System-Defined Criteria

- Project Status - Select projects with a specific status for the company chosen
- Include the subproject information

User-Specified Criteria

- Company name
- Project status

URL

/Reports/rpProjectByStatus.asp

Projects by Status and Project Manager

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Projects by Status and Project Manager**.

   The **Projects by Status and Project Manager** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers, Finance

Purpose

This report contains an listing of projects in the system for the selected Project Managers and selected project status.

Display Details

Report Header

- Project Managers included in this report
- Project status included in this report

Report Data

- Company name
- Project name
- Project Manager
- Project status
- Engagement name

System-Defined Criteria

- Select projects with the status chosen, for the Project Manager chosen
- Sorted by the selected sort method

User-Specified Criteria

- Project Manager name. Only project managers from workgroups to which the user has access are listed.
- Project status

URL

/Reports/rpProjectByStatus_PM.asp

Resource Functions

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Project Management** category and click **Resource Functions**.
   The **Resource Functions** report displays in the Details view.

Intended Audience

- Resource Managers, Department Managers

Purpose

This report displays a list of functions that the resource possesses.

Display Details

- Functions assigned to the resource

- Associated qualifications and competencies

- Flags for missing and currently held functions, qualifications and competencies.

System-Defined Criteria

- All functions assigned to a selected resource.

> **Note:** Users will only be able to view their own history unless they have the View Functions of Others feature.

User-Specified Criteria

- Resource Name

URL

/Reports/rpResFunction.asp

Resources by Task

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Project Management** category and click **Resources by Task**.
   The **Resources by Task** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report contains a listing of project tasks sorted by resource with status information.

Display Details

- Project name

- Project Manager

- Task name

- Planned start date

- Planned finish date

- Actual start date

- Actual finish date

- Resource name

- Planned hours

- Actual hours

- Remaining hours

- Total hours

- Variance

- Total for task

System-Defined Criteria

- Only projects for which the user is the manager or co-manager are listed

- Calculate the total hours (actual plus remaining)

- Sorted by resource name then task name

User-Specified Criteria

- Company name

- Engagement name

- Project name

URL

/Reports/rpTaskByResource.asp

Task Status Compliance

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Task Status Compliance**.

   The **Task Status Compliance** displays in the Details view.

Intended Audience

- Project Managers

Purpose

Shows the task status information for a selected project and allows the Project Manager to update the status on behalf of a resource.

Display Details

- Project Manager
- Include subproject information flag
- Project
- Task status icon (click the icon to perform a status update)
- Task name (click the link to perform a status update)
- Resource name
- Last Status
- Planned/Forecast/Actual:
- Start
- End
- Hours
- Remaining hours
- Total hours
- Percentage completed
- Report generation date

System-Defined Criteria

- Selects all active tasks for the project and displays all planned, actual and status information
- Sortable columns are "task name", "resource name", and "last status date"

User-Specified Criteria

- Project Name

URL

/Reports/rpTaskCompliance.asp

Tasks in Progress or Scheduled to Start

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Tasks in Progress or Scheduled to Start**.

   The **Tasks in Progress or Scheduled to Start** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report contains a list of all tasks in progress or scheduled to start within the next two weeks by selected project.

Display Details

- Project name
- Project Manager
- Task name
- Resource name
- Planned start date
- Planned finish date
- Forecast finish date
- Planned hours
- Actual hours
- Remaining hours
- Total remaining hours

System-Defined Criteria

- Select tasks that have a planned start date within the next two weeks

User-Specified Criteria

- Project name

URL

/Reports/rpTaskSchToStart.asp

Tasks Scheduled to Finish in Two Weeks

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Project Management** category and click **Tasks Scheduled to Finish in Two Weeks**.

   The **Tasks Scheduled to Finish in Two Weeks** report displays in the Details view.

Intended Audience

- Project Managers, Engagement Managers

Purpose

This report contains a listing, by selected project, of all tasks scheduled to finish within the next two weeks.

Display Details

- Project name
- Project Manager
- Task name
- Resource name
- Planned start date
- Planned finish date
- Actual finish date
- Planned hours
- Actual hours
- Remaining hours
- Actual plus remaining hours

System-Defined Criteria

- Select tasks that have a planned end date within the next two weeks

User-Specified Criteria

- Project name

URL

/Reports/rpTaskSchToFinish.asp

CHAPTER 10
Recruitment Management Reports

Recruitment Management Category

The following reports are included under Recruitment Management:

- "Active Staffing Requests" on page 89
- "Staffing Candidate Source" on page 90
- "Vendor Report Card" on page 90

Active Staffing Requests

The following sections include information on the Active Staffing Requests report.

Intended Audience

Human Resources, Resource Managers, Engagement Managers, and Project Managers

Purpose

This reports lists all active Staffing Requests and all candidates associated with the request.

Display Details

Report Data

- Candidates listed by source (by staffing vendor and Internal)
- Candidate workflow hiring step.
- Staffing Request number.
- Total number of candidates associated with the Staffing Request from each source.

System-Defined Criteria

- Displays approved and active staffing requests and all candidates submitted against the request created by the user or created by resources in workgroups for which the user is a resource manager.
- Includes the candidate's hiring workflow stage.

User-Specified Criteria

None

URL

/reports/RMActiveRequisitions.asp

Staffing Candidate Source

The following sections include information on the Staffing Candidate Source report.

Intended Audience

Human Resources and Resource Managers.

Purpose

This report displays the source of the candidates based upon the distribution of the Staffing Requests

Display Details

Report Header
- Staffing Requests included the report
- Functions specified on Staffing Requests
- Start Date
- End Date

Report Data
- Distribution Type
- Number of Staffing Requests
- Number of Candidates Sourced (received)
- Number of Candidates Hired

System-Defined Criteria

Displays Staffing Requests that ever had Active status.

User-Specified Criteria

- Staffing Requests
- Functions specified on the Staffing Request
- Start Date for the report
- End Date for the report

URL

/reports/RMCandidateSource.asp

Vendor Report Card

The following sections include information on the Vendor Report Card report.

Intended Audience

Human Resources and Resource Managers

Purpose

This report displays staffing vendor performance with respect to the number and function of the candidates supplied and their progression through the hiring workflow.

Display Details

Report Header

- Staffing Vendor

- Functions specified on Staffing Requests

- Status of Staffing Request

- Start Date

- End Date

Report Data

- Total number of staffing requests

- Staffing requests divided by function

- Total number of candidates that match the function criteria with link to staffing requests

- Function of matched candidate supplied by staffing vendor

- Breakdown of candidates going through the hiring process.

System-Defined Criteria

- Displays companies that have the **Staffing Vendor** check box selected on the Company dialog box.

User-Specified Criteria

- Staffing Vendor

- Functions

- Status

- Start Date for the report

- End Date for the report

URL

/reports/RMVendorRptCard.asp

CHAPTER 11
Request Management Reports

Support Desk Reports Category

Your ability to view request management **reports requires one or a combination of the following features:** View Requests**,** Create Requests**,** Edit Requests **or** Delete Requests**.**

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **Support Desk Reports** category.

   The following reports are included under the Support Desk Reports category:
   - "All Requests by Assignee" on page 94
   - "All Requests by Company" on page 95
   - "All Requests by Product" on page 96
   - "All Requests by Request Type" on page 97
   - "All Requests by Status" on page 98
   - "Bugs Reports" on page 99
   - "Inactive Requests by Product" on page 100
   - "My Queues" on page 101
   - "My Request Assignments" on page 102
   - "Open Requests by Assignee" on page 102
   - "Open Requests by Category" on page 103
   - "Open Requests by Company" on page 104
   - "Open Requests by Date" on page 105
   - "Open Requests by Initiator" on page 106
   - "Open Requests by Priority" on page 107
   - "Open Requests by Product" on page 108
   - "Public Support Items" on page 109
   - "Request Summary" on page 110
   - "Support Items by Type" on page 111
   - "Suspended Requests" on page 112
   - "Unapproved Support Items" on page 113
   - "Unassigned Requests by Open Date" on page 114
   - "Unassigned Requests by Priority" on page 114

All Requests by Assignee

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **All Requests by Assignee**.

   The **All Requests by Assignee** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of all requests sorted by assignee.

Display Details

- Request type
- Request status
- Request number
- Initiator
- Company name
- Open date
- Description

System-Defined Criteria

- Select all requests
- Requests grouped by assignee
- Requests grouped by request type
- Requests grouped by request status

User-Specified Criteria

- Support Desk
- Assignee

URL

/HelpDesk/rpAllRequestByAssignee.asp

All Requests by Company

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **All Requests by Company**.

   The **All Requests by Company** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of all requests sorted by company.

Display Details

- Company name. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request status. Click the plus icon to expand the list.
- Request priority
- Initiator
- Open date
- Request number
- Description

System-Defined Criteria

- Select all requests
- Grouped requests by company
- Grouped request type
- Grouped request status

User-Specified Criteria

- Support Desk
- Company name

URL

/HelpDesk/rpAllRequestsByCustomer.asp

All Requests by Product

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **All Requests by Product**.

   The **All Requests by Product** report displays.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of all requests sorted by product.

Display Details

- Product. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request status. Click the plus icon to expand the list.
- Request priority
- Initiator
- Open date
- Request number
- Description

System-Defined Criteria

- Select all requests
- Grouped requests by product
- Grouped request type
- Grouped request status

User-Specified Criteria

- Support Desk
- Product

URL

/HelpDesk/rpAllRequestsByProduct.asp

All Requests by Request Type

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **All Requests by Request Type**.

   The **All Requests by Request Type** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of all requests sorted by request type.

Display Details

- Request type. Click the plus icon to expand the list.
- Request status. Click the plus icon to expand the list.
- Request priority. Click the plus icon to expand the list.
- Request number
- Open date
- Initiator
- Description

System-Defined Criteria

- Select all requests
- Grouped requests by request type
- Grouped requests by request status
- Grouped requests by request priority
- Sorted by request number

User-Specified Criteria

- Support Desk
- Request type

URL

/HelpDesk/rpAllRequestsByRequestType.asp

All Requests by Status

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Support Desk Reports** category and click **All Requests by Status**.

   The **All Requests by Status** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of all requests sorted by request status.

Display Details

- Request status. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Assigned to
- Request number
- Initiator
- Open date
- Description

System-Defined Criteria

- Select all requests
- Grouped requests by request status
- Grouped requests by request type
- Sorted by Assignee and Request number

User-Specified Criteria

- Support Desk
- Status

URL

/HelpDesk/rpAllRequestsByStatus.asp

Bugs Reports

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Bug Reports**.

   The **Bug Reports** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a selected listing of bug reports.

Display Details

- Initiator
- Request number
- Request priority
- Request description
- Status

System-Defined Criteria

Select all bug reports matching the user-selected criteria

- Sorted by first selection
- Request priority

User-Specified Criteria

- Start date
- End date
- Group:
  - Workgroup
  - Resource
  - Request Priority
  - Product

URL

/HelpDesk/rpBugsSelect.asp

Inactive Requests by Product

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Inactive Requests by Product**.
   The **Inactive Requests by Product** report displays.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of canceled, rejected, and closed requests by product.

Display Details

- Product. Click the plus icon to expand the list.
- Request category. Click the plus icon to expand the list.
- Request sub-category. Click the plus icon to expand the list.
- Request number
- Priority
- Assignee
- Open date
- Description

System-Defined Criteria

- Select requests
- Requests grouped by product
- Requests grouped by category
- Requests grouped by sub-category

User-Specified Criteria

- Request type
- Support Desk
- Product

URL

/HelpDesk/rpClosedRequestsByProduct.asp

My Queues

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **My Queues**.

   The **My Queues** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of requests contained in queues of which the user is a member.

Display Details

- Queue. Click the plus icon to expand the list.
- Request priority. Click the plus icon to expand the list.
- Request number
- Request type
- Date
- Initiator
- Company name
- Description

System-Defined Criteria

- Select queues of which the user is a member
- Grouped requests by queue
- Grouped by request priority
- Sorted by request number

User-Specified Criteria

- None

URL

/HelpDesk/rpMyQueues.asp

My Request Assignments

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Support Desk Reports** category and click **My Request Assignments**.

   The **My Request Assignments** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of requests assigned to the user.

Display Details

- Priority. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request number
- Open date
- Initiator
- Company name
- Description

System-Defined Criteria

- Select requests that have been assigned to the user
- Grouped by priority
- Grouped by request type

User-Specified Criteria

- None

URL

/HelpDesk/rpMyRequests.asp

Open Requests by Assignee

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Support Desk Reports** category and click **Open Requests by Assignee**.
   The **Open Requests by Assignee** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by assignee.

Display Details

- Assignee.Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request status. Click the plus icon to expand the list.
- Request number
- Initiator
- Company name
- Open date
- Description

System-Defined Criteria

- Select open requests
- Grouped by assignee
- Grouped by request type
- Grouped by request status

User-Specified Criteria

- Support Desk
- Assignee

URL

/HelpDesk/rpOpenRequestsByAssignee.asp

Open Requests by Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Open Requests by Category**.
   The **Open Requests by Category** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by request category.

Display Details

- Request category. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request number
- Initiator
- Company name
- Description

> **Note:** Planning requests do not display in the Requests by Category report.

System-Defined Criteria

- Select open requests
- Grouped by request category
- Grouped by request type

User-Specified Criteria

- Support Desk
- Category

URL

/HelpDesk/rpOpenRequestsByCategory.asp

Open Requests by Company

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Open Requests by Company**.
   The **Open Requests by Company** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by company.

Display Details

- Company name. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request status. Click the plus icon to expand the list.
- Request priority
- Open date
- Request number
- Description

System-Defined Criteria

- Select open requests
- Grouped by company
- Grouped by request type
- Grouped by request status

User-Specified Criteria

- Support Desk
- Company name

URL

/HelpDesk/rpOpenRequestsByCustomer.asp

Open Requests by Date

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Open Requests by Date**.

   The **Open Requests by Date** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by date.

Display Details

- Date. Click the plus icon to expand the list.

- Request type. Click the plus icon to expand the list.

- Assignee. Click the plus icon to expand the list.

- Status

- Initiator

- Company name

- Request number

- Description

System-Defined Criteria

- Select open requests

- Grouped by date

- Grouped by request type

- Grouped by assignee

User-Specified Criteria

- Support Desk

- Start date

- End date

URL

/HelpDesk/rpOpenRequestsByDate.asp

Open Requests by Initiator

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Open Requests by Initiator**.

   The **Open Requests by Initiator** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by initiator.

Display Details

- Initiator. Click the plus icon to expand the list.

- Request type. Click the plus icon to expand the list.

- Request number

- Company name

- Open date

- Description

System-Defined Criteria

- Select open requests

- Grouped by initiator

- Grouped by request type

User-Specified Criteria

- Support Desk

- Initiator

URL

/HelpDesk/rpOpenRequestsByInitiator.asp

Open Requests by Priority

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Open Requests by Priority**.
   The **Open Requests by Priority** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by priority.

Display Details

- Priority. Click the plus icon to expand the list.

- Request type. Click the plus icon to expand the list.

- Open date

- Request number

- Initiator
- Company name
- Description

System-Defined Criteria

- Select open requests
- Grouped by priority
- Grouped by request type

User-Specified Criteria

- Support Desk
- Priority

URL

/HelpDesk/rpOpenRequestsByPriority.asp

Open Requests by Product

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Open Requests by Product**.

   The **Open Requests by Product** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of open requests by product.

Display Details

- Product. Click the plus icon to expand the list.
- Request category. Click the plus icon to expand the list.
- Request sub-category. Click the plus icon to expand the list.
- Request number
- Priority
- Assignee
- Open date
- Description

System-Defined Criteria

- Select open requests
- Grouped by product
- Grouped by request category and sub-category

User-Specified Criteria

- Support Desk
- Request type
- Product

URL

/HelpDesk/rpOpenRequestsByProduct.asp

Public Support Items

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Public Support Items**.

   Note: Access to the **Public Support Items report requires one or a combination of the following features:** View Support Items**,** Create Support Items**,** Edit Support Items **or** Delete Support Items**.**

   The **Public Support Items** report displays.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of support items that are marked as public.

Display Details

- Type. Click the plus icon to expand the list.
- Title
- Author
- Client Portal User (Yes/No)

System-Defined Criteria

- Select approved knowledge base items that have been made public = Yes

- Grouped by type
- Sorted by title

User-Specified Criteria

- None

URL

/HelpDesk/rpPublicKBArticles.asp

Request Summary

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Request Summary**.
   The **Request Summary** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report displays summary information for a group of requests as defined by the selection criteria.

Display Details

- Request Number
- Assignee
- Company
- Request Type
- Request Priority
- Request Status
- Reported Date
- Required Date
- Last Status Date
- Description
- Details (optional)

System-Defined Criteria

- None

User-Specified Criteria

- Support Desk
- Resource/Queue (Assigned/Creator/Initiator)
- Group By (Resource/Queue, Company, Type, Priority, Status, Request Category) Ascending/Descending
- Sort By (Request, Resource/Queue, Company, Type, Priority, Status, Reported Date, Required Date) Ascending/Descending
- Include Details
- Include Closed Requests

URL

/HelpDesk/rpReqSumSelection.asp

Support Items by Type

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Support Items by Type**.

   Note: Access to the **Support Items by Type report requires one or a combination of the following features:** View Support Items**,** Create Support Items**,** Edit Support Items **or** Delete Support Items**.**

   The **Support Items by Type** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of support items.

Display Details

- Type. Click the plus icon to expand the list.
- Title
- Author
- Public (Yes/No)
- Guest (Yes/No)

System-Defined Criteria

- Select approved knowledge base items

- Grouped by type
- Sorted by title

User-Specified Criteria

- None

URL

/HelpDesk/rpKBArticlesByType.asp

Suspended Requests

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Suspended Requests**.

   The **Suspended Requests by Open Date** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

A list of all requests marked as suspended. A request can be suspended in the Request dialog box by selecting the "Selected" check box, so that it is not included in the number of open requests.

Display Details

- Date. Click the plus icon to expand the list.
- Request Type. Click the plus icon to expand the list.
- Request number
- Company name
- Initiator
- Description

System-Defined Criteria

- Displays requests where the suspended flag is checked

User-Specified Criteria

- Support Desk

URL

/HelpDesk/rpSuspendedRequests.asp

Unapproved Support Items

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Support Desk Reports** category and click **Unapproved Support Items**.

Note: Access to the **Unapproved Support Items report requires one or a combination of the following features:** View Support Items**,** Create Support Items**,** Edit Support Items **or** Delete Support Items**.**

The **Unapproved Support Items** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of support items that are unapproved.

Display Details

- Type. Click the plus icon to expand the list.
- Title
- Author
- Public (Yes/No)
- Client Portal User (Yes/No)

System-Defined Criteria

- Select unapproved knowledge base items
- Grouped by type
- Sorted by title

User-Specified Criteria

- None

URL

/HelpDesk/rpUnapprovedKBArticles.asp

Unassigned Requests by Open Date

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Support Desk Reports** category and click **Unassigned Requests by Open Date**.

   The **Unassigned Requests by Open Date** report displays in the Details view.

Intended Audience

- Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of unassigned requests sorted by date.

Display Details

- Date. Click the plus icon to expand the list.
- Request type. Click the plus icon to expand the list.
- Request number
- Company name
- Initiator
- Description

System-Defined Criteria

- Select unassigned requests
- Grouped by date
- Grouped by request type

User-Specified Criteria

- Support Desk

URL

/HelpDesk/rpUnassignedRequests.asp

Unassigned Requests by Priority

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Support Desk Reports** category and click **Unassigned Requests by Priority**.
    The **Unassigned Requests by Priority** report displays in the Details view.

Intended Audience

*   Support Desk Managers, Support Desk Personnel

Purpose

This report contains a listing of unassigned requests sorted by priority.

Display Details

*   Request priority. Click the plus icon to expand the list.
*   Request type. Click the plus icon to expand the list.
*   Open date
*   Request number
*   Company name
*   Description

System-Defined Criteria

*   Select unassigned requests
*   Grouped by priority
*   Grouped by request type

User-Specified Criteria

*   Support Desk
*   Priority

URL

/HelpDesk/rpUnassignedRequestsbyPriority.asp

CHAPTER 12
Resource Management Reports

Resource Management Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **Resource Management** category.

   The following reports are included under the **Resource Management** category:
   - "Planned Revenue by Engagement" on page 117
   - "Billable Utilization by Workgroup" on page 119
   - "Invoiced Hours by Resource" on page 120
   - "Vacation Tracking" on page 121
   - "Responsibility by Resource" on page 123
   - "Open Positions" on page 124
   - "Resource History" on page 126
   - "Resource Requests" on page 127
   - "Workload by Resource" on page 129
   - "Resources by Approver" on page 129
   - "Utilization by Workgroup" on page 130
   - "Resources by Function" on page 133
   - "Resources by Primary Function" on page 134

Planned Revenue by Engagement

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Resource Management** category and click Planned Revenue by Engagement.

   The report displays in the Details view.

Intended Audience

- Finance

Purpose

This report can be used as a cash projection tool. It details planned revenue by engagement, based on projected time and fixed fees.

Display Details

Planned Revenue Amount:

- Engagement name
- Contract amount
- Currency

Week Beginning:

- Date

Total:

- Engagement total

Report Total (Currency)

System-Defined Criteria

- **Forecast Time:** Selects tasks with a forecast finish date that is greater than or equal to the start date of the period selected and with a forecast start date that is less than or equal to the ending date of the period selected.

  Takes the forecast remaining hours for each task (billable, not associated with a fixed fee) and spreads it out by week until the forecast finish date, for the hours per week, then applies a billing rate (using the billing formula of matching resource and billing role on the task to the engagement, and converting to the engagement currency; for daily engagements, the billing rate is divided by the resources hours per day or by 8, if hours is not populated) to come up with a dollar value per week. Each task's value should be accumulated into the week.

- **Uninvoiced Time:** Looks at time with the engagement id that has been entered, submitted or approved but not yet invoiced, assigns a billing rate to it based on the rate associated with the time record (as populated by the Update Time Rate job; daily rate are divided by the resources hours per day or by 8, if hours is not populated). All time that has a date less than or equal to the first bucket's ending date should be accumulated in week one; all the rest (if they are entering time into the future) can be put into the appropriate weekly bucket.

- **Uninvoiced Fixed Fees:** Selects all fixed fees for the engagement that have not yet been billed, and puts the billing amount into the appropriate bucket based on the fixed fee's billing date.

- **Uninvoiced Product:** Selects all products for the engagement that have not yet been billed and puts the billing amount into the appropriate bucket based on the billing date.

- The report will be sorted by engagement name and engagement currency, with totals for each currency.

User-Specified Criteria

- Billing Office

- Engagement name
- Start date
- Number of weeks to display

URL

/Reports/rpRevBookedByCo.asp

Billable Utilization by Workgroup

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Billable Utilization by Workgroup**.

   The **Billable Utilization by Workgroup** report displays in the Details view.

Intended Audience

- Resource Managers or Department Managers

Purpose

This report provides a listing by workgroup of all approved non-project, billable and unbillable hours within a certain time period.

Display Details

- Start date
- End date
- Resource/Task name
- Standard hours (time entered to non-project time)
- Billable hours (time entered to tasks marked as billable)
- Unbillable hours (time entered to tasks marked as unbillable)
- Billable utilization (time entered to tasks marked as billable and utilization eligible)
- Total (total hours entered for the period - will not necessarily be the sum of the columns)

System-Defined Criteria

- This report selects approved hours for the date range chosen.

User-Specified Criteria

- Start date
- End date

- Workgroup

- **Report all time to the user's current Workgroup**

   For resources that have been transferred to different workgroups during the selected date range, you can specify whether to report all hours during the date range to the resource's current workgroup, or to report the hours to the workgroup to which the resource belonged at the time the hours were entered.

Example

John worked in Development from 07/01/2007 to 06/30/2007 and worked 800 hours. John transferred to Marketing on 07/01/2007 (where he still works) from 07/01/2007 to 12/31/2007 he worked 800 hours.

Consider the following reports:

   a. Dept. = Marketing (John's current workgroup); Date Range = 01/01/2007 to 12/31/2007; Select Report all time to the user's current workgroup

Total hours = 1600 (all hours in the date range attributed to his current workgroup, i.e., Marketing)

   b. Dept. = Marketing; Date Range = 01/01/2007 to 12/31/2007; Clear (do no select) Report all time to the user's current workgroup

Total hours = 800 (only hours actually worked in Marketing are displayed)

   c. Dept. = Development; Date Range = 01/01/2007 to 12/31/2007; Select Report all time to the user's current workgroup

Total hours = 0 (all hours would show as Marketing, but this report is for Development, so 0 hours will show.

   d. Dept. = Development; Date Range = 01/01/2007 to 12/31/2007; Clear (do no select) Report all time to the user's current workgroup

Total hours = 800 (only hours actually worked in Development are displayed)

URL

/Reports/rpTimeUtilization.asp

Invoiced Hours by Resource

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Billable Hours by Resource**.

   The **Invoiced Hours by Resource** report displays in the Details view.

Intended Audience

- Managers

Purpose

This report contains the billable-invoiced time by resource for a defined time period.

Display Details

- Resource name

- Department name

- Start date

- End date

- Print date

- Company name

- Project name

- Task name

- Billing Role

- Regular hours

- Overtime hours

- Write-off hours

- Invoiced hours

System-Defined Criteria

- Time (approved):
    - Regular
    - Overtime
    - Written off

- Hours invoiced

User-Specified Criteria

- Resource name

- Start date

- End date

URL

/Reports/rpIndividualUtilization.asp

Vacation Tracking

1. The Reports tree view can be accessed through two methods:
    - In the Applications bar, expand the My Applications section and click **Reports**.
    - In the Folders view, click **Folders** and select **Reports**.

    The Reports tree view opens.
2. Expand the **Resource Management** category and click **Vacation Tracking**.

    The **Vacation Tracking** report displays in the Details view.

Intended Audience

• Managers

Purpose

This is a global vacation tracking report that allows the user to run the report by employee, workgroup or global workgroup.

Display Details

Depending on display selection:

Report will display details for 1-year period, starting from the date selected.

• Resource (employee) and/or Global Workgroup and/or Workgroup

• Date

• Hours taken

• Hours allowed (obtained from their resource profile, and a calculation of remaining hours)

• Hours remaining

System-Defined Criteria

• Vacation entered in Changepoint for that calendar year

User-Specified Criteria

• Date

• Display (for example, by Resource, Workgroup, or Global Workgroup)

• Resource name/Workgroup name/Global Workgroup name

• If global workgroup or workgroup is selected:

  Click the **Report all time to the user's current Workgroup** check box.

  For resources that have been transferred to different global workgroups or workgroups during the selected date range, you can specify whether to report all hours during the date range to the resource's current global workgroup/workgroup, or to report the hours to the global workgroup/workgroup to which the resource belonged at the time the hours were entered.

Example

John worked in Development from 07/01/2007 to 06/30/2007 and worked 800 hours. John transferred to Marketing on 07/01/2007 (where he still works) from 07/01/2007 to 12/31/2007 he worked 800 hours.

Consider the following reports:

    a.   Dept. = Marketing (John's current workgroup); Date Range = 01/01/2007 to 12/31/2007; Select Report all time to the user's current workgroup

         Total hours = 1600 (all hours in the date range attributed to his current workgroup, i.e., Marketing)

b. Dept. = Marketing; Date Range = 01/01/2007 to 12/31/2007; Clear (do no select) Report all time to the user's current workgroup

Total hours = 800 (only hours actually worked in Marketing are displayed)

c. Dept. = Development; Date Range = 01/01/2007 to 12/31/2007; Select Report all time to the user's current workgroup

Total hours = 0 (all hours would show as Marketing, but this report is for Development, so 0 hours will show.

d. Dept. = Development; Date Range = 01/01/2007 to 12/31/2007; Clear (do no select) Report all time to the user's current workgroup

Total hours = 800 (only hours actually worked in Development are displayed)

URL

/Reports/rpVacationReport.asp

Responsibility by Resource

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Responsibility by Resource**.

   The report displays in the Details view.

Intended Audience

- Managers

Purpose

This report contains details about the management responsibility of a selected resource.

Display Details

Project details:

- Project name
- Company name
- Project status
- Planned start date

Engagement Details:

- Engagement name
- Company name
- Engagement status
- Effective Contract date

Opportunity details:

- Opportunity name
- Company name
- Opportunity status
- Revised close date

System-Defined Criteria

- Engagements, where the resource is an Engagement Manager
- Projects, where the resource is a Project Manager
- Opportunities, where the resource is the Sales Representative

User-Specified Criteria

- Resource

URL

/Reports/rpProjByRes.asp

Open Positions

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Open Positions**.

   The **Open Positions** report opens in a new window.

Intended Audience

- Resource Managers, Department Managers

Purpose

The report shows all available job positions available within an organization.

Display Details

- For Open Staffing Requests
  - Staffing Request Number
  - Position Title
  - Staffing Request Function
  - Position Type
  - Start Date
  - Min. Duration
  - Max. Duration
  - Location
  - Workgroup
  - Resource
  - Company
  - Contact
  - Number of Positions

- For Open Resource Requests
  - Company
  - Engagement Name
  - Current Status
  - Resource Request Function
  - Billing Role
  - Start Date
  - Estimated Hours
  - Engagement Manager
  - Engagement Manager Workgroup
  - Resource Request Number
  - Resource Manager
  - Requested Resource

- For Unassigned Tasks
  - Company
  - Engagement Name
  - Project Name
  - Task Name
  - Function Name
  - Billing Role
  - Planned Start
  - Planned Finish
  - Planned Hours
  - Project Manager

- For Unstaffed Task Assignments
  - Company
  - Engagement Name
  - Project Name
  - Task Name
  - Function Description
  - Billing Role
  - Planned Start
  - Planned Finish
  - Planned Hours
  - Project Manager
- For Unassigned Opportunities
  - Company
  - Opportunity Name
  - Status
  - Opportunity Billing Role
  - Opportunity Function
  - Start Date
  - End Date
  - Estimated Effort
  - Sales Region
  - Sales Rep.
  - Staffing Workgroup
  - Sales Rep. Workgroup

User-Specified Criteria

- Engagement Status
- Opportunity Status
- Workgroup
- Staffing Workgroup

Resource History

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Resource History**.

   The **Resource History** report displays in the Details view.

Intended Audience

- Resource Managers, Department Managers

Purpose

This report shows the history of the selected resource. It is a summary of the work history effective dates for a resource profile. Effective dates record when changes to the resource's profile occur. Future effective dates entered on a profile are viewed in the "URL" on page 201 report with the System Administration reports (allows only specific resources to view future changes such as transfers or terminations).

Display Details

Resource Name

- Global Workgroup - displays when resource first assigned global workgroup changed

- Workgroup - displays when resource assigned or transferred

- Type of change (Activated/Unassigned/Transfer/Termination)

- Effective Date - date the change took effect

- Updated by - name of person who changed the resource profile

- Report to - displays if Report To name changed

- Time Approver - displays if Time Approver name changed

- Expense Approver - displays if Expense Approver changed

- Resource Title - displays if titled changed

- Function - displays if primary function changed

System-Defined Criteria

- All changes to the selected resource profile with present or past effective dates.
  Users will only be able to view their own history unless they have the View Resource History of Others feature.

User-Specified Criteria

- Resource Name

URL

/Reports/rpResourceHistory.asp

Resource Requests

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Resource Requests**.
   The **Resource Requests** report displays in the Details view.

Intended Audience

- Resource Managers, Department Managers

Purpose

This report displays all the open requests that are accessible to the user.

Display Details

Requests Assigned to Me (current requests requiring action)

Requests Available to Me (initiated requests waiting for an action from another user. These requests are still available to the initiator, for example, to cancel a request.)

- Request Number – includes a hyperlink to the Request Detail page.

- Workgroup – displays initiator's Engagement Manager's workgroup.

- Entity type – displays the entity where the request was initiated. Includes a hyperlink to the profile.

- Function – displays the required function for the resource.

- Billing Role – displays the required billing role for the resource.

- Status – displays the current status of the request.

- Start Date – displays the date the resource is required.

- End Date – displays the date the resource's tasks will be finished.

- Initiator – displays the name of the request initiator.

- Resource Manager – displays the Resource Manager who has been assigned to this request.

- Resource – displays the resource who has been currently selected by the Resource Manager. This includes a hyperlink to the resource profile.

> **Note:** All columns in this report can be sorted.

System-Defined Criteria

- Selects open requests requiring action by the user or request that are available to the user even if another user's action is required.

User-Specified Criteria

- My Requests (as a participant)

- My Workgroup and Workgroups that are accessible to the user.

URL

/Core/Engagement/ProjectedResource/rpProjectedResources.asp

Workload by Resource

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Resource Management** category and click **Workload by Resource**.

   The **Workload by Resource** report displays in the Details view.

Intended Audience

- Resource Managers

Purpose

This report is a view of the Weekly Workload of resources or teams of resources in departments.

Display Details

- Resource name

- Engagement name

- Project name

- Task name

- Weekly breakdown

The Hours per week takes into consideration the remaining hours/total number of working days up until the forecast finish date (the number of hours a resource works in a day is defined and obtained from his/her resource profile)

System-Defined Criteria

- Any assigned project work, taking into consideration the forecast of the resource

User-Specified Criteria

- Workgroup

URL

/Reports/rpResWorkloadSelect.asp

Resources by Approver

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Resource Management** category and click **Resources by Approver**.
   The **All Resources by Approver** report displays in the Details view.

Intended Audience

- System Managers

Purpose

This report contains a list of approval rights by resource, including the Line Approver of Time, Expenses and Engagement Time and Expense Approvals.

Display Details

- Resources for which the user has:
  - Time Approval rights
  - Expense Approval rights
- Engagements for which the user is either a Resource Approver or an Engagement Approver

System-Defined Criteria

- All time and approval rights by approver

User-Specified Criteria

- Resource Name

URL

/Reports/rpResourcesByApprover.asp

Utilization by Workgroup

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Utilization by Workgroup**
   The **Utilization by Workgroup** report displays in the Details view.

Intended Audience

- Resource Managers or Department Managers

Purpose

This report provides the utilization rate for a specific workgroup for a certain date range. The report includes billable time, total hours, write-off hours and target hours.

Display Details

Report Heading:

- Workgroup

- Start date (if selected)

- End date (if selected)

- Fiscal Period selection (if selected)

- Fiscal Year (if selected)

- Fiscal Period (if selected)

- Report all time to the user's current Workgroup

Utilization:

- Resource name

- Workgroup

- Total hours (total approved hours)

- Billable hours (total hours for tasks marked as billable)

- Utilization hours (total hours for tasks and non-project time marked as utilization eligible)

- Hours written off/up (hours written off or up on an invoice where the write-off reason chosen affects utilization).

- Estimated target hours (resource annual target hours pro-rated over the time period selected)
  Estimated target hours = working days in the time period selected * resource's annual target hours / number of working days in the year.

  where:

  Number of working days in the time period selected—counts the number of working days from the start date selected to the end date selected, and excludes weekends and any days marked as nonworking days within the non-project time setup (that is, the non-project time that is set up for a specific date) that fall into the date range selected.

  Resource annual target hours—from the resource profile, confidential section.

  Number of working days in the year—takes from Jan. 1 to Dec. 31 of the years that fall into the start and end dates selected, counts the number of working days excluding weekends and any days marked as nonworking days within the non-project time setup (that is, the non-project time that is set up for a specific date) that fall into the years selected.

  For example, the annual target hours for a resource is 1200. The time period selected for the report is 1/1/2009 to 3/31/2009. According to the non-project time setup, there is one nonworking day in February and one additional nonworking day in June for a total of two nonworking days within the year. The estimated target hours would be 291.9 which is calculated as follows:

  63 * 1200 / 259 = 291.9

  where 63 = (90 days in the period - 26 weekend days - 1 nonworking day)

  and where 259 = (365 days in the year - 104 weekend days - 2 nonworking days).

- Billable % of Target ((billable hours minus write-off hours) divided by estimated target hours)

- Utilization % of Target (utilization hours minus write-off hours) divided by estimated target hours)

- Hours per Day

- Billable % of Expected Hours

This column is calculated using the following information:

The resource's hours per day multiplied by the number of working days between the start and end dates selected for the report to get the "Expected Hours" (for example, if it's a two-week period and the person is supposed to work 8 hours per day, the "expected hours" would be 80).

The billable hours (net of written off hours that affect utilization) are divided by the "expected hours" to get the billable percentage of expected hours.

If the resource's hours per day are not populated, use the "hours per day" setting in system manager, or use 8 if that's not populated either.

System-Defined Criteria

- This report selects approved hours for the date range specified.

User-Specified Criteria

- Workgroup
- Fiscal Period
    - Fiscal Period Selection
    - Fiscal Year
    - Fiscal Year
- Date Range
    - Start Date
    - Start Date
- Report all time to the user's current Workgroup

    For resources that have been transferred to different workgroups during the selected date range, you can specify whether to report all hours during the date range to the resource's current workgroup, or to report the hours to the workgroup to which the resource belonged at the time the hours were entered.

Example

John worked in Development from 01/01/2009 to 06/30/2009 and worked 800 hours. John transferred to Marketing on 07/01/2009 (where he still works) from 07/01/2009 to 12/31/2009. He worked 800 hours.

Consider the following reports:

   a. Dept. = Marketing (John's current workgroup); Date Range = 01/01/2009 to 12/31/2009; Select Report all time to the user's current workgroup

Total hours = 1600 (all hours in the date range attributed to his current workgroup, Marketing)

b. Dept. = Marketing Date Range = 01/01/2009 to 12/31/2009; Deselect Report all time to the user's current workgroup

Total hours = 800 (only hours actually worked in Marketing are displayed)

c. Dept. = Development; Date Range = 01/01/2009 to 12/31/2009; Select Report all time to the user's current workgroup

Total hours = 0 (all hours would show as Marketing, but this report is for Development, so 0 hours will show.

d. Dept. = Development; Date Range = 01/01/2009 to 12/31/2009; Deselect Report all time to the user's current workgroup

Total hours = 800 (only hours actually worked in Development are displayed)

URL

/Reports/rpWorkgroupUtilization.aspx

Resources by Function

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Resource Management** category and click **Resources by Function**.

   The **Resources by Function** report displays.

Intended Audience

- Resource Managers, Department Managers

Purpose

This report displays a list of functions by resource.

Display Details

- Functions assigned to the resource

System-Defined Criteria

- All functions assigned to a selected resource.

   Note: Users will only be able to view their own history unless they have the View Functions Assignments of Others feature.

User-Specified Criteria

- Global Workgroup
- Workgroup
- Function

URL

/Reports/rpResourceByFunction.aspx

Resources by Primary Function

1. The Reports tree view can be accessed through two methods:
    *   In the Applications bar, expand the My Applications section and click **Reports**.
    *   In the Folders view, click **Folders** and select **Reports**.
    The Reports tree view opens.
2. Expand the **Resource Management** category and click **Resources by Primary Function**.
    The **Resources by Function** report opens in a new window.

Intended Audience

*   Resource Managers, Department Managers

Purpose

This report displays a list of primary functions by resource.

User-Specified Criteria

*   Primary function

Display Details

*   Global Workgroup
*   Workgroup
*   Primary Function

Workgroup Record History

1. The Reports tree view can be accessed through two methods:
    *   In the Applications bar, expand the My Applications section and click **Reports**.
    *   In the Folders view, click **Folders** and select **Reports**.
    The Reports tree view opens.
2. Expand the **Resource Management** category and click **Workgroup Record History**.
    The **Workgroup Record History** report displays.

Intended Audience

*   Resource Managers, Department Managers

Purpose

For the selected resource, this report shows time and expense records by workgroup for a specified period. This report displays the history of when a resource was hired, transferred, unassigned, terminated, and /or had manager changes (changes to Reports to, Time Approver, Expense Approver, Job Title) during the specified time period.

Display Details

- Resource Name

- Report Start Date

- Report End Date

- Workgroup

- Action (Activated/Unassigned/Transfer/Termination)

- Record Type (what was changed)

- Start Date

- End Date

- Min Date

- Max Date

- Count

System-Defined Criteria

- For the selected resource, time and expense records by workgroup in the date range are selected. All records with changes to the Workgroup History or Manager are selected.

User-Specified Criteria

- Start Date

- End date

- Resource Name

URL

/Core/Report/rpWorkRecHistory.asp

CHAPTER 13
Revenue Management Reports

About Revenue Recognition Reports

For a listing of Revenue Recognition reports, see the "Revenue Recognition Reporting" chapter in the *Revenue Management User Guide*.

Invoices Category

The following reports are included under Invoices:

Batch Invoices Processes

For more information on how to submit invoices:

- See the "Invoice Overview and Preparation" chapterin the *Revenue Management User Guide*
- See the "Invoice Creation" chapter in the *Revenue Management User Guide*
- See the "Invoice Processing" chapter in the *Revenue Management User Guide*

Revenue Recognition Reports

See the "Revenue Recognition Reporting" chapter in the *Revenue Management User Guide*.

Associate Invoiced Time with Fixed Fee

Intended Audience

Finance

Purpose

To let organizations to associate invoiced time records with specific fixed fees.

Display Details

- Company
- Engagement
- Project
- Task
- Resource
- Date
- Regular Hours
- Overtime Hours
- Fixed Fee

System-Defined Criteria

- Time records sorted by company and then date.

User Specified Criteria

Billing Office

Company

Engagement

Fiscal Period: Fiscal Year and Fiscal Period

or

Date Range: Start and End Dates

URL

/Reports/rpAssociateTimeWithFixedFee.aspx

Batch Committed Invoices

Intended Audience

Finance

Purpose

This report shows a listing of invoices that were committed by the batch invoicing process.

Display Details

- Company
- Engagement
- Draft Invoice Number
- Committed Invoice Number
- Committed on
- Committed by

System-Defined Criteria

- Selects all invoices committed by the batch invoicing process, sorts by invoice status, then by company, then by engagement, then by invoice date.

User Specified Criteria

- Start date
- End date

Batch Invoicing Errors

Intended Audience

- Finance

Purpose

This report shows any invoices that could not be created by the batch invoice process.

Display Details

- Billing Office
- Company
- Engagement

- Engagement manager
- Created by (name)
- Created on (date)
- Reason

System-Defined Criteria

- Selects all items chosen for batch invoicing for which invoice creation was unsuccessful.

User-Specified Criteria

- None

URL

/Core/Report/rpNonExistingInvoices.asp

Batch Invoicing Processes

For more information, see the "About the Batch Invoice Processes" section in the "Invoice Creation" chapter in the *Revenue Management User Guide*.

Batch Invoices Created

Intended Audience

- Finance

Purpose

This report shows a listing of invoices that were created by the batch invoicing process.

Display Details

- Invoice status
- Company
- Invoice date
- Invoice number
- Paid status
- Invoice total
- Currency
- Invoice description

System-Defined Criteria

- Selects all invoices created by the batch invoicing process, sorts by invoice status, then by company, then by engagement, then by invoice date.

User-Specified Criteria

- Currency

URL

/Core/Report/vwInvByBatch.asp

Batch Printing

For more information, see the "Printing Bulk Invoices Locally" section in the "Invoice Creation" chapter and the "Printing Invoices in Scheduled Batches" section in the "Invoice Creation" chapter in the *Revenue Management User Guide*.

Invoice Details with Net Write-Offs

Intended Audience

- Finance, Customers (if more detail is required)

Purpose

This report contains a breakdown by date of hours and expenses for an invoice. Balances to the Invoice General format. Only project time and expenses are broken down; all other items, such as fixed fees, product, additional items and tax amounts, are not shown on this report.

Display Details

Invoice Information:

- Invoice number
- Company name
- Invoice status
- Invoice date
- Engagement
- Invoice currency

Expand each section to view the details.

> **Note:** Only sections that have details item are displayed (for example, if there is no time on the Invoice, time section is not displayed).

Time Section:

For multiple time entries which have same date, resource and task, one row displays and it has the + icon (only for daily engagements). Click + to expand the row and display all time for the same date, resource and task.

Time records are sorted by date within each group of entries that have same resource and task.

- Date
- Resource name

- Project name
- Task name
- Description
- Time Codes 1,2,3
- Regular hours
- Regular write-off hours
- Overtime rate
- Write-Off overtime hours
- Days (includes time written off)
- Regular rate
- Write-off reason code
- Write-off description
- Work location
- Work code
- Tax schedule
- Tax amount
- Total amount for the entry

Totals for each group of entries that have same resource and task.

Totals for the **Time** section.

Support Time section:

For multiple time entries which have same date, resource and task, one row displays and it has the + icon (only for daily engagements). Click + to expand the row and display all time for the same date, resource and task.

Time records are sorted by date within each group of entries that have same resource and task.

- Support time date
- Resource name
- Request number
- Time description
- Time Codes 1,2,3
- Regular hours
- Overtime hours
- Rate
- Write-off hours
- Write-off reason code
- Write-off description
- Work location

- Work code

- Tax schedule

- Tax amount

- Total amount for the entry

Totals for each group of entries that have same resource and task.

Totals for the **Support Time** section.

Expenses section:

Expense records are sorted by date within each group of entries that have same resource and expense type.

- Expense date

- Resource name

- Project name

- Expense type

- Expense description

- Expense codes 1,2,3

- Expense text 1,2,3

- Quantity

- Unit price

- Expense amount, which are net of recoverable taxes, i.e., the invoiced amount of the expense.

- Net of recoverable taxes

- Percent of billing for split billing

- Write-off amount

- Write-off reason code

- Write-off description

- Work location

- Work code

- Tax schedule

- Tax amount

- Total amount for the entry

Totals for each group of entries that have same resource and expense.

Totals for the **Expenses** section.

Products section:

The product records are sorted by date.

- Product billing date

- Product name

- Product description (from the engagement)

- Quantity

- Unit price

- Amount Written-Off/Up

- Write off reason code

- Write off description

- Ship to location

- Tax schedule

- Tax amount

- Total invoiced amount (quantity times unit price plus amount written-off/up)

Totals for tax amount and invoiced amount for all products.

Fixed Fee section:

The fixed fee records are sorted by date.

- Fixed fee billing date

- Description of the fixed fee deliverable

- Prepaid (check box from the fixed fee deliverable)

- Work location

- Work code

- Tax schedule

- Tax amount

- Total billing amount

Totals for tax amount and billing amount of all fixed fee items.

Additional Items section:

Additional items are sorted by description.

- Description

- Tax Schedule

- Tax amount

- Amount

Totals for invoiced amount and tax amount for all additional items.

Adjustments section:

- Total time adjustment (from the **Total adjustment** field on the **Time** tab of the Invoice dialog box)

- Total expense adjustment (from the **Total adjustment** field on the **Expenses** tab of the Invoice dialog box)

- Total adjustment for additional items (from the **Total adjustment** field on the **Additional Items** tab of the Invoice dialog box)

- Total Tax Adjustments (from the Invoice dialog box)

System-Defined Criteria

- Time, support time, expenses, fixed fees, products, additional items and adjustments per the invoice general format, detailing those sections

- Write-offs are shown as a column.

User-Specified Criteria

- Company name

- Invoice number

URL

/Reports/rpInvoiceDetailWO.asp

Invoices by Billing Office

Intended Audience

- Finance

Purpose

This report contains a listing of invoices by billing office.

Display Details

- Billing Office

- Date

- Invoice number

- Status

- Total

- Paid

- Description

- Total for billing office

System-Defined Criteria

- Grouped by billing office

- Sorted within by invoice number

User-Specified Criteria

- Currency

- Committed totals for Billing Office

URL

/core/report/vwInvByBillingOffice.asp

Invoices by Billing Office and Month

Intended Audience

- Finance

Purpose

This report contains a listing of invoices grouped by billing office and month.

Display Details

Report Header

- Summary of selections: billing offices selected, invoice status selected, currency selected
- Reporting period (select one):
    - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
    - Start date, end date

Report Data

- Billing Office. Click the plus icon to expand the list.
- Month. Click the plus icon to expand the list.
    - Date
    - Invoice number
    - Status
    - Total
    - Currency
    - Paid
    - Description
- Total committed for the month
- Total invoiced for the month
- Total committed for the billing office
- Total invoiced for the billing office

System-Defined Criteria

- Grouped by billing office
- Grouped by month
- Sorted within the month by invoice number
- Amounts converted to the selected currency

User-Specified Criteria

- Billing Office

- Invoice status

- Currency

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwInvByBillingOfficeMonth.asp

Invoices by Customer

Intended Audience

- Finance

Purpose

This report contains a listing of invoices grouped by company.

Display Details

- Company name. Click the plus icon to expand the list.

- Invoice date

- Invoice number

- Invoice status

- Invoice total

- Paid

- Description

- Total for company

System-Defined Criteria

- Grouped by company

- Sorted by Invoice Date

- Amounts converted to the selected currency

User-Specified Criteria

- Currency

URL

/core/report/vwInvByClient.asp

Invoices by Currency

Intended Audience

- Finance

Purpose

This report contains a listing of invoices grouped by currency.

Display Details

- Currency. Click the plus icon to expand the list.
- Company name. Click the plus icon to expand the list.
- Invoice date
- Invoice number
- Invoice status
- Invoice total
- Currency
- Paid
- Description
- Total committed to the company
- Total invoiced to the company

System-Defined Criteria

- Grouped by Currency
- Grouped by Company name
- Sorted in descending order by invoice date

User-Specified Criteria

- Currency

URL

/core/report/vwInvByInvoiceCurrency.asp

Invoices by Date

Intended Audience

- Finance

Purpose

This report contains a listing of invoices sorted by date.

Display Details

- Invoice date
- Invoice number
- Invoice status
- Invoice total
- Currency
- Paid
- Description
- Committed Total
- Total invoiced amount

System-Defined Criteria

- Sorted by date

User-Specified Criteria

- Currency

URL

/core/report/vwInvByDate.asp

Invoices by Engagement Manager

Intended Audience

- Finance, Engagement Managers

Purpose

This report contains a listing of invoices grouped by Engagement Manager.

Display Details

Report Header

- Summary of selections: Engagement Managers selected, invoice status selected, currency selected
- Reporting period:
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods
  - Start date, end date

Report Data

- Engagement Manager. Click the plus icon to expand the list.

- Invoice date

- Invoice number

- Invoice status

- Invoice total

- Paid

- Description

- Committed total for Engagement Manager

- Total for Engagement Manager

System-Defined Criteria

- Grouped by Engagement Manager

- Amounts converted to the chosen currency

User-Specified Criteria

- Engagement Manager

- Invoice status

- Currency

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwInvByEngagementManager.asp

Invoices by Invoice Number

Intended Audience

- Finance

Purpose

This report contains a listing of invoices sorted by invoice number.

Display Details

- Invoice date
- Invoice number
- Invoice status
- Invoice total
- Currency
- Paid
- Description
- Committed total
- Total for report

System-Defined Criteria

- Sorted by invoice number
- Amounts converted to the currency chosen

User-Specified Criteria

- Company
- Engagement
- Invoice number
- Start date
- End Date
- Currency

> *Tip:* You can select company then engagement and you will be presented with a list of invoice numbers to select. Otherwise, you can type all or part of an invoice number and the report will list invoices that match the numbered entered.

URL

/core/report/vwInvByInvoiceNum.asp

Invoices by Month

Intended Audience

- Finance

Purpose

This report contains a listing of invoices grouped by month.

Display Details

- Month. Click the plus icon to expand the list.
- Company name. Click the plus icon to expand the list.
- Invoice date
- Invoice number
- Invoice status
- Invoice total
- Currency
- Paid
- Description
- Totals for company by month

System-Defined Criteria

- Grouped by month
- Sorted within the month by company

User-Specified Criteria

- Currency

URL

/core/report/vwInvByMonth.asp

Invoices by Project Manager

Intended Audience

- Finance, Engagement Managers, Project Managers

Purpose

This report contains a listing of invoices grouped by Project Manager.

Display Details

- Project Manager. Click the plus icon to expand the list.

- Invoice date

- Invoice number

- Invoice status

- Invoice total

- Currency

- Paid

- Description

- Total committed for Project Manager

- Totals for Project Manager

> **Note:** If an invoice contains multiple records from different projects, it will be shown under both Project Managers.

System-Defined Criteria

- Grouped by Project Manager

- Sorted by invoice number

User-Specified Criteria

- Currency

URL

/core/report/vwInvByProjectManager.asp

Invoices by Status

Intended Audience

- Finance, Engagement Managers, Project Managers

Purpose

This report contains a listing of invoices sorted by invoice status for the selected date range, billing offices, invoice status and currency.

Display Details

Report heading:

- Summary of selections: billing offices included in the report, invoice status included in the report, currency selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date
- Billing Offices included in the report

Report data:

Invoice list sorted by status, then by company:

- Invoice status. Click the plus icon to expand the list.
- Company name. Click the plus icon to expand the list.
- Invoice date
- Invoice number
- Invoice status
- Invoice total
- Currency
- Paid
- Description
- Total committed for the company
- Total invoiced to the company
- Total committed for invoices in that status
- Total of invoices in that status

System-Defined Criteria

- Grouped by invoice status
- Grouped by company
- Invoices sorted by invoice number
- Converted to the currency selected

User-Specified Criteria

- Billing Office
- Invoice status
- Currency
- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwInvByStatus.asp

Invoices with Details by Company

Intended Audience

- Finance

Purpose

This report contains a listing of invoices grouped by client, and listed by totals billed for each category.

Display Details

Report Header

- Summary of selections: companies selected, invoice status selected, currency selected
- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name. Click the plus icon to expand the list.
- Invoice number
- Invoice status
- Currency (as selected by the user)
- Total time billed
- Total expenses billed
- Total other billed
- Invoice total
- Total committed for the company
- Total invoiced to the company

System-Defined Criteria

- Grouped by company
- Sorted by invoice number

- Amount converted to the selected currency

User-Specified Criteria

- Company name. Use the type-ahead field to filter the company listing, then select from the list. Select **All**, or use the CTRL or SHIFT key to select multiple customers.

- Invoice status

- Currency

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwInvbyComponent.asp

Split Billing Consolidation

Intended Audience

- Engagement Managers, Project Managers, Finance, Sales Personnel

Purpose

This report provides consolidated invoicing information for the selected split billed engagements.

Display Details

Heading for each engagement:
- Engagement name
- Contract amount, start date and end date
- Billing currency
- Billing type

For each engagement:
- Company name and percentage included in the split:
- For each company— Display all invoices for the company using this engagement: Invoice Number, Invoice Date, Invoice Amount, Invoice Status
  Subtotal —Total invoice amount for the company

- Total —Total invoice amount for all companies in the split billing engagement.

System-Defined Criteria

- Sorted by engagement and "bill to" company.

User-Specified Criteria

- Billing Office

- Company

- Engagement

URL

/Finance/SplitBillingReport/rpSplitBillingConsolidate.asp

Unpaid Invoices

Intended Audience

- Finance, Engagement Managers

Purpose

This report contains a listing of unpaid invoices with aging.

Display Details

- Billing Office. Click the small right-pointing arrow to expand the list.

- Company name. Click the small right-pointing arrow to expand the list.

- Invoice number

- Last Status date

- Invoice amount

- Currency

- Amount in Invoice currency

- Amount in Selected currency

- Status check mark:
  - Current
  - Greater than 30 days
  - Greater than 60 days
  - Greater than 90 days

- Total committed for company

- Total committed for billing office

System-Defined Criteria

- Grouped by:
  - Billing Office
  - Company
- Invoices with status Committed, Sent, or Partial Paid, sorted by invoice number
- Totals for:
  - Committed invoices for the company
  - Committed invoices for the billing office

User-Specified Criteria

- Currency

URL

/core/report/vwInvByUnpaidInv.asp

Work Performed and Invoiced

Intended Audience

- Finance, Engagement Managers

Purpose

This report contains a listing of invoices for work billed to a company and/or for work performed for the company.

Display Details

Work billed to: Company name

- Billing Office
- Company the work was performed for (if different than bill to)
- Engagement
- Invoice number
- Currency
- Invoice total
- Time total (includes write-off/up and time adjustment)
- Expense total (includes write-off/up and expense adjustment)
- Fixed fee total, support time total (includes write-off/up and time adjustment)
- Product total (includes write-off/up)
- Additional items total (includes adjustments)
- Tax total (includes tax adjustments)

- A sub total for each currency

- A grand total will be displayed for each column (only grand total will be converted to the currency selected)

Work performed for: Company name

- Billing Office

- Company the work was billed to

- Engagement

- Invoice number

- Currency

- Invoice total

- Time total (includes write-off/up and time adjustment)

- Expense total (includes write-off/up and expense adjustment)

- Fixed fee total, support time total (includes write-off/up and time adjustment)

- Product total (includes write-off/up)

- Additional items total (includes adjustments)

- Tax total (includes tax adjustments)

- A sub total for each currency

- A grand total will be displayed for each column (only grand total will be converted to the currency selected)

Report Totals for: Company name

- Grand totals for each section.

System-Defined Criteria

For the selected date range, company, billing offices and engagements:

- Displays invoices that have the selected company as the Bill To (work billed to this company)

- Displays invoices that have the selected company as Work Performed For (work billed to another company)

User-Specified Criteria

- Company name

- Billing Office

- Engagement

> **Note:** If split billing is used, the split billing percentage displays beside the main and phantom engagements in the drop-down list.

- Period Start

- Period End

- Invoice amount
- Currency

URL

/core/report/rpTotalWorkPerformed.asp

CHAPTER 14
Time and Expense Reports

Time and Expense Reports Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **Time and Expense Reports** category.

   The following reports are included under the **Time and Expense Reports** category:
   - "Batch Time and Expenses Approval" on page 161
   - "Expense Reports by Resource" on page 163
   - "Expense Reports by Status" on page 164
   - "Expense Write-Offs/Ups" on page 166
   - "Shared Resources Details" on page 167
   - "Shared Resources Details with Costs" on page 169
   - "Shared Resources Summary" on page 171
   - "Shared Resources Summary with Costs" on page 172
   - "Time and Expenses by Company" on page 173
   - "Time and Expenses by Billing Office" on page 174
   - "Time and Expenses by Invoice Number" on page 176
   - "Time and Expenses by Resource" on page 178
   - "Time Listing" on page 179
   - "Time Listing with Costs" on page 181
   - "Time Listing with Costs and Billing Information" on page 183
   - "Time Submission Conformance" on page 185
   - "Time Write-Offs/Ups" on page 187
   - "Unapproved Time and Expenses" on page 189
   - "Unapproved Time by Approver" on page 190
   - "Unbilled Time and Expenses" on page 192

Batch Time and Expenses Approval

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Batch Time and Expenses Approval**.

    The **Batch Time and Expenses Approval** report displays in the Details view.

For information about running batch time and expense approvals, see the "Approving Time and Expenses in Batches" section in the "Time and Expense Approval" chapter in the *Time and Expense Management User Guide*.

Intended Audience

*   Finance personnel, Regional Managers/Directors, Upper Management or can anyone who could take care of approvals when the normal approver is unavailable.

Purpose

Several time sheets/expense reports can be approved/rejected at once. This is particularly useful if an approver is not available or if time and expense approval is critical.

Display Details

Time Entries

*   Resource name
*   Company name
*   Engagement
*   Project
*   Task
*   Date
*   Regular Hours
*   Overtime Hours
*   Description
*   Level (approval type, i.e., engagement, line, second-level)
*   Check box beside each row (time entry).

Expense Reports

*   Expense report number
*   Resource name (resource that submitted the expense report)
*   Company name
*   Engagement
*   Date submitted
*   Expense report amount
*   Expense report currency
*   Level (approval type, i.e., engagement, line, second-level)
*   Checkbox beside each row (expense report).

System-Defined Criteria

- Time sheets

- Expense reports

- Approval of batch time and expense

- Include Children

User-Specified Criteria

- Workgroup

- Resource (whose time/expenses needs to be approved)

- Approver (the person listed as the time approver)

- Select Time Entries, Expense Reports or both

URL

/Core/Report/rpBatchtimeAndExpenseApproval.asp

Expense Reports by Resource

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Expense Reports by Resource**.

   The **Expense Reports by Resource** report displays in the Details view.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report prints expense reports for any Changepoint resource.

Display Details

- Resource name. Click the plus icon to expand the list.

- Expense report number

- Amount

- Currency

- Status

- Engagement

- Company name

- Date created on

System-Defined Criteria

- Expense reports:
  - sorted by resource
  - sorted by expense report number

User-Specified Criteria

- Workgroup. Select a workgroup or use the CTRL or SHIFT key to select multiple workgroups.

- Resource name. The list is populated based on the workgroups chosen.

- Select **Date Range** or **Fiscal Period**

Date Range:
  - Start date
  - End date

Fiscal Period:
  - Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
  - Fiscal Year
  - Fiscal Period

URL

/core/report/rpExpenseReportsByResource.asp

Expense Reports by Status

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Expense Reports by Status**.
   The **Expense Reports by Status** report displays in the Details view.

Intended Audience

- Finance Managers, Engagement Managers, Project Managers

Purpose

This report lists expense reports by status from any resource.

Display Details

Report Header

- Summary of selections: workgroups selected, resources selected, expense report status selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Expense report status

- Expense report number

- Amount

- Currency (of the expense report)

- Resource name

- Project name

- Engagement

- Company name

- Date created on

- Total expenses for reports in that status (in user's home currency)

System-Defined Criteria

- Expense reports that have been created by resources and collected by status

User-Specified Criteria

- Workgroup

- Resource

- Expense report status

- Select **Date Range** or **Fiscal Period**

Date Range:
  - Start date
  - End date

Fiscal Period:
  - Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
  - Fiscal Year
  - Fiscal Period

URL

/core/report/rpExpenseReportsbyStatus.asp

Expense Write-Offs/Ups

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Expense Write-Offs/Ups**.
   The **Expense Write-Offs/Ups** report displays.

Intended Audience

- Engagement Managers, Finance, Project Managers

Purpose

This report lists expenses, by company, that have been written off by the invoicer.

Display Details

Report Header

- Summary of selections: companies selected, engagements selected, projects selected, currency selected
- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name. Click the plus icon to expand the list.
- Project name. Click the plus icon to expand the list.
- Unbillable icon
- Written off icon

Expenses:
- Resource name
- Amount written off
- Currency
- Description
- Reason for the write off
- Total Expenses for the project
- Total Expenses for the company

System-Defined Criteria

- All expenses written off, according to the selected criteria, for all invoice statuses.

User-Specified Criteria

- Company name

- Engagement name

- Project name

- Currency

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/Core/Report/vwInvTimeAndExpenseByWriteOffExpenses.asp

Shared Resources Details

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Shared Resources Details**.

   The **Shared Resources Details** report displays in the Details view.

Intended Audience

Engagement Managers

Purpose

Shows billing amounts for time records where the resource's workgroup is different than the Engagement Manager's workgroup.

Display Details

Report Data

- Billing Office

- Company

- Engagement

- Project

- Task
- Engagement Manager Workgroup
- Global Workgroup
- Workgroup
- Resource
- Date
- Created On
- Time Status
- Time Type
- Start Time
- End Time
- Invoice Status
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Billable
- Capital
- Utilized
- Billable Regular Hours
- Billable OT Hours
- Regular Hours
- OT Hours
- Regular Billing Rate
- Regular Billing Currency
- OT Billing Rate
- OT Billing Currency
- Equivalent Hourly Billing Rate
- Equivalent Hourly Billing Currency
- Extended Billing Amount
- Description
- Actual Status

System-Defined Criteria

- Date

User-Specified Criteria

- Billable (Y/N)

- Date

- Engagement Management Workgroup

- Invoice Status

- Time Status

- Time Type

- Workgroup Name

Shared Resources Details with Costs

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Shared Resources Details with Costs**.

   The **Shared Resources Details with Costs** report displays in the Details view.

Intended Audience

Engagement Managers

Purpose

Shows cost and billing amounts for time records where the resource's workgroup is different than the Engagement Manager's workgroup.

Display Details

- Billing Office

- Company

- Engagement

- Project

- Task

- Engagement Manager Workgroup

- Global Workgroup

- Workgroup

- Resource

- Date

- Created On

- Time Status

- Time Type
- Start Time
- End Time
- Invoice Status
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Billable
- Capital
- Utilized
- Billable Regular Hours
- Billable OT Hours
- Regular Hours
- OT Hours
- Regular Cost Rate
- Regular Cost Currency
- OT Cost Rate
- OT Cost Currency
- Regular Billing Rate
- Regular Billing Currency
- OT Billing Rate
- OT Billing Currency
- Equivalent Hourly Billing Rate
- Equivalent Hourly Billing Currency
- Extended Billing Amount
- Extended Cost
- Description
- Actual Status

System-Defined Criteria

- Date

User-Specified Criteria

- Billable (Y/N)
- Date

- Engagement Management Workgroup
- Invoice Status
- Time Status
- Time Type
- Workgroup Name

Shared Resources Summary

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Shared Resources Summary**.

   The **Shared Resources Summary** report displays in the Details view.

Intended Audience

Engagement Managers

Purpose

Shows billing amounts for time records where the resource's workgroup is different than the Engagement Manager's workgroup.

Display Details

- Regular Billing Currency
- Billable Regular Hours
- Billable OT Hours
- Regular Hours
- OT Hours
- Extended Billing Amount

System-Defined Criteria

- Date

User-Specified Criteria

- Date
- Engagement Management Workgroup
- Invoice Status
- Regular Billing Currency
- Time Status

- Time Type
- Workgroup

Shared Resources Summary with Costs

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Shared Resources Summary with Costs**.

   The **Shared Resources Summary with Costs** report displays in the Details view.

Intended Audience

Engagement Managers

Purpose

Shows cost and billing amounts for time records where the resource's workgroup is different than the Engagement Manager's workgroup.

Display Details

- Regular Billing Currency
- Billable Regular Hours
- Billable OT Hours
- Regular Hours
- OT Hours
- Extended Billing Amount
- Extended Cost

System-Defined Criteria

- Date

User-Specified Criteria

- Date
- Engagement Management Workgroup
- Invoice Status
- Regular Billing Currency
- Time Status
- Time Type
- Workgroup

Time and Expenses by Company

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Time and Expenses by Company**.

   The **Time and Expenses by Company** report displays.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report lists all approved time and expenses by company.

Display Details

Report Header

- Summary of selections: companies selected, engagements selected, projects selected, currency selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name. Click the plus icon to expand the list.
- Project name. Click the plus icon to expand the list.

- Unbillable icon

- Written off icon

Time:

- Date when the time was incurred
- Resource name

- Billed icon
- Number of Hours
- Task name
- Description for time
- Total time for project

Expenses:
- Date when expense was incurred
- Resource name

- Billed icon
- Amount
- Currency
- Task name
- Description
- Total expenses for project

- Total time for company

- Total expense for company

System-Defined Criteria

- All approved time and expenses by selected company

User-Specified Criteria

- Company name. Use the type-ahead field to filter the company listing, then select from the list. Select **All,** or use the CTRL or key to select multiple companies.

- Engagement. The list is populated based on the companies chosen.

- Project. The list is populated based on the engagements chosen.

- Currency (to convert expenses)

- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/Core/Report/vwInvTimeAndExpenseByClient.asp

Time and Expenses by Billing Office

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Time and Expenses by Billing Office**.

    The **Time and Expenses by Billing Office** report displays in the Details view.

Intended Audience

- Finance Managers

Purpose

This report lists all time and expenses by billing office.

Display Details

Report Header

- Summary of selections: billing offices selected, currency selected
- Reporting period (select one):
    - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected.
    - Start date, end date

Report Data

- Billing Office. Click the plus icon to expand the list.
- Company name. Click the plus icon to expand the list.

- Unbillable icon

- Written off icon

Time:

- Date when the time was incurred
- Resource name

- Billed icon
- Number of Hours
- Task name
- Description for time
- Total time for company

Expenses:

- Date when expense was incurred
- Resource name

- Billed icon
- Amount
- Currency
- Task Name
- Description
- Total expenses for company
- Total time for billing office

- Total expense for billing office

System-Defined Criteria

- All approved time and expenses for the selected billing offices

User-Specified Criteria

- Select whether to display time only, expenses only, or both time and expenses
- Billing Office
- Currency (to convert expense reports)
- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwInvTimeAndExpenseByBillingOffice.asp

Time and Expenses by Invoice Number

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Time and Expenses by Invoice Number**.

   The **Time and Expenses by Invoice Number** report displays in the Details view.

Intended Audience

- Engagement/Project Managers and Finance.

Purpose

This report lists all time and expenses related to a particular invoice.

Display Details

Report Header

- Summary of selections: companies selected, invoices selected, currency selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Invoice number. Click the plus icon to expand the list.

- Company name. Click the plus icon to expand the list.

Time:
  - Date when the time was incurred
  - Resource name
  - Hours
  - Task name
  - Description
  - Total time

Expenses:
  - Date when expense was incurred
  - Resource name
  - Amount
  - Currency
  - Task Name
  - Description
  - Total expenses

- Total time for invoice

- Total expenses for invoice

System-Defined Criteria

- All invoiced time and expense including write-offs for that invoice.

User-Specified Criteria

- Company name. Use the type-ahead field to filter the company listing, then select from the list. Select **All,** or use the CTRL or SHIFT key to select multiple companies.

- Invoice number

- Currency (to convert expenses)

- Select **Date Range** or **Fiscal Period**

Date Range:
  - Start date
  - End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwInvTimeandExpensebyInv.asp

Time and Expenses by Resource

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Time and Expense by Resource**.

   The **Time and Expenses by Resource** report displays in the Details view.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report lists all approved time and expenses by employee, based on the preferences specified in the Time and Expense settings.

Display Details

Report Header

- Summary of selections: workgroups selected, resources selected, currency selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Resource name Click the plus icon to expand the list.

- Company name. Click the plus icon to expand the list.

Time:
- Date when the time was incurred

- Billed icon
- Amount
- Task name
- Description
- Total time

Expenses:

- Date when expense was incurred

- Billed icon

- Amount
- Currency
- Task name
- Description
- Total expenses

- Total time and expenses for the employee.

System-Defined Criteria

- All approved time and expenses for selected employees

User-Specified Criteria

- Select whether to display time only, expenses only, or both time and expenses

- Workgroup. Select a workgroup or use the CTRL or SHIFT key to select multiple workgroups.

- Resource name. The list is populated based on the workgroups chosen.

- Currency (to convert expenses)

- Select **Date Range** or **Fiscal Period**

Date Range:

- Start date
- End date

Fiscal Period:

- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/Core/Report/vwInvTimeAndExpenseByResource.asp

Time Listing

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Time Listing**.

   The **Time Listing** report displays in the Details view.

Intended Audience

- Engagement, Project and Finance Managers.

Purpose

It lists all time, regardless of status, and the fields related to a time record.

Display Details

Report Data

- Company
- Engagement
- Project
- Combined Name
- Task
- Global Workgroup
- Workgroup
- Resource
- Time Date
- Created On
- Time Status
- Time Type
- Request Project
- Start Time
- End Time
- Invoiced
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Billable
- Capital
- Utilized
- Regular Hours
- OT Hours
- Time Code 1
- Time Code 2
- Time Code 3

- Description
- Work Location
- Work Code
- Locked
- Interfaced
- Actual Status

System-Defined Criteria

- Time Date

User-Specified Criteria

- Billing Office Name
- Company Name
- Engagement Name
- Global Workgroup Name
- Project Name
- Resource Name
- Time Date
- Time Status
- Time Type
- Work Location
- Work Code
- Workgroup Name

Time Listing with Costs

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Time Listing with Costs**.

   The **Time Listing with Costs** report displays in the Details view.

Intended Audience

- Engagement, Project and Finance Managers.

Purpose

It lists all time, regardless of status, and the fields related to a time record including cost related fields.

Display Details

Report Data

- Company
- Engagement
- Project
- Combined Name
- Task
- Global Workgroup
- Workgroup
- Resource
- Time Date
- Created On
- Time Status
- Time Type
- Request Project
- Start Time
- End Time
- Invoiced
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Billable
- Capital
- Utilized
- Regular Hours
- OT Hours
- Regular Cost Rate
- Regular Cost Rate Currency
- Overtime Cost Rate
- Overtime Cost Rate Currency
- Extended Cost Amount
- Time Code 1
- Time Code 2
- Time Code 3
- Description

- Work Location

- Work Code

- Locked

- Interfaced

- Actual

System-Defined Criteria

- Time Date

User-Specified Criteria

- Billing Office Name

- Company Name

- Engagement Name

- Global Workgroup Name

- Project Name

- Resource Name

- Time Date

- Time Status

- Time Type

- Work Location

- Work Code

- Workgroup Name

Time Listing with Costs and Billing Information

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Time Listing with Costs and Billing Information**.

   The **Time Listing with Costs and Billing Information** report displays in the Details view.

Intended Audience

- Engagement, Project and Finance Managers.

Purpose

It lists all time, regardless of status, and the fields related to a time record including cost and billing related fields.

Display Details

Report Data

- Billing Office
- Company
- Engagement
- Project
- Combined Name
- Task
- Global Workgroup
- Workgroup
- Resource
- Time Date
- Created On
- Time Status
- Time Type
- Request Project
- Start Time
- End Time
- Invoiced
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Billable
- Capital
- Utilized
- Billable Regular Hours
- Billable OT Hours
- Regular Hours
- OT Hours
- Regular Cost Rate
- Regular Cost Rate Currency
- OT Cost Rate
- OT Cost Rate Currency
- Regular Billing Rate
- Regular Billing Currency

- OT Billing Rate
- OT Billing Currency
- Extended Billing Amount
- Extended Cost Amount
- Code 1
- Code 2
- Code 3
- Work Location
- Work Code
- Description
- Locked
- Interfaced
- Actual

System-Defined Criteria

- Time Date

User-Specified Criteria

- Billing Office Name
- Company Name
- Engagement Name
- Global Workgroup Name
- Project Name
- Resource Name
- Time Date
- Time Status
- Time Type
- Work Location
- Work Code
- Workgroup Name

Time Submission Conformance

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Time Submission Conformance**.

   The **Time Conformance Report by Week** report displays in the Details view.

Intended Audience

- Line Managers

Purpose

This report contains a listing of resources by workgroup, by week who have not conformed to their expected time submission rules. Nonworking days are excluded from the conformance calculations.

There is also an option to send an e-mail reminder to users who have not yet submitted their time.

Display Details

- Workgroup
- Start date
- End date
- Resource (employee) name
- Total hours
- Billable hours
- Required hours
- Billable utilization
- Variance
- Totals for group
- Percent of employees who have met their required hours per week

System-Defined Criteria

- All time submitted into system (not necessarily approved)

User-Specified Criteria

- Global Workgroup
- Workgroup
- Start date

   Note: Users will only be able to select from global workgroups or workgroups to which they have access.

- **Report all time to the user's current Workgroup**

   For resources that have been transferred to different workgroups during the selected date range, you can specify whether to report all hours during the date range to the resource's

current workgroup, or to report the hours to the workgroup to which the resource belonged at the time the hours were entered.

Example

John transferred from Development to Marketing on 05/15/2002. That week, John worked 16 hours (on 05/13/2002 and 05/14/2002) for Development and 24 hours (from 05/15/2002 to 05/17/2002) for Marketing.

Consider the following reports:

a. Dept. = Marketing (John's current workgroup) Start Date = 05/13/2002. Select Report all time to the user's current Global Workgroup or Workgroup.

Total hours = 40 (all hours that week attributed to his current workgroup, i.e., Marketing)

b. Dept. = Marketing Start Date = 05/13/2002 Clear (do no select) Report all time to the user's current Global Workgroup or Workgroup.

Total hours = 24 (only hours actually worked in Marketing are displayed)

c. Dept. = Development Start Date = 05/13/2002. Select Report all time to the user's current Global Workgroup or Workgroup

Total hours = 0 (all hours would show as Marketing, but this report is for Development, so 0 hours will show.

d. Dept. = Development Start Date = 05/13/2002 Clear (do no select). Report all time to the user's current Global Workgroup or Workgroup

Total hours =16 (only hours actually worked in Development display).

URL

/reports/rptimeconformance.asp

Time Write-Offs/Ups

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Time Write-Offs/Ups**.

   The **Time Write Off/Ups** report displays in the Details view.

Intended Audience

- Engagement/Project Managers

Purpose

This report lists all the time entries that have been written off as ordered by the company.

Display Details

Report Header

- Summary of selections: companies selected, engagements selected, projects selected, currency selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name. Click the plus icon to expand the list.

- Project name. Click the plus icon to expand the list.

- Unbillable icon

- Written off icon

Time:

- Resource name
- Hours
- Utilization affected
- Description
- Reason for write-off
- Totals for the project
- Totals for the company

System-Defined Criteria

- All time that has been written off

User-Specified Criteria

- Company name. Use the type-ahead field to filter the company listing, then select from the list. Select **All,** or use the CTRL or SHIFT key to select multiple companies.

- Engagement. The list is populated based on the companies chosen.

- Project. The list is populated based on the engagements chosen.

- Select **Date Range** or **Fiscal Period**

Date Range:

- Start date
- End date

Fiscal Period:

- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/Core/Report/vwInvTimeAndExpenseByWriteOffTime.asp

Unapproved Time and Expenses

The Reports tree view can be accessed through two methods:

- In the Applications bar, expand the My Applications section and click **Reports**.
- In the Folders view, click **Folders** and select **Reports**.

The Reports tree view opens.

3. Expand the **Time and Expense Reports** category and click **Unapproved Time and Expenses**.

    The **Unapproved Time and Expenses** report displays in the Details view.

Intended Audience

- Management, Finance

Purpose

This report provides a view of all time and expenses by company that have been submitted but not approved.

Display Details

Report Header

- Summary of selections: companies selected, currency selected

- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data

- Company name. Click the plus icon to expand the list.

- Project name. Click the plus icon to expand the list.

Time:
- Date when the time was incurred
- Resource name
- Amount of hours
- Task name
- Description for time
- Total time for project

Expenses:
- Date when expense was incurred
- Resource name
- Amount of expense
- Currency
- Task name
- Description
- Total expenses for project

- Total time for company
- Total expenses for company

System-Defined Criteria

- All unapproved submitted time and expenses by company.

User-Specified Criteria

- Company name. Use the type-ahead field to filter the company listing, then select from the list. Select **All,** or use the CTRL or SHIFT key to select multiple companies.
- Currency (to convert expenses)
- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

URL

/core/report/vwUnapprovedTimeAndExpenseByClient.asp

Unapproved Time by Approver

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **Time and Expense Reports** category and click **Unapproved Time by Approver**.
   The **Unapproved Time by Approver** report displays in the Details view.

Intended Audience

- Management, Finance

Purpose

- This report provides a view of all unapproved time by approver.

Display Details

Report Header

- Workgroups selected
- Reporting period (select one):
  - Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

Report Data
- Time approver
- Resource name
- Billable hours
- Unbillable hours
- Total hours
- Total unapproved time by approver

System-Defined Criteria

- All unapproved submitted time by approver

User-Specified Criteria

- Department (workgroup) of the resources who entered the time. Select a workgroup or **All**. Use the CTRL or SHIFT key to select multiple workgroups.
- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period
- Indicate whether or not you want to include request time
- **Report all time to the user's current Workgroup**
- For resources that have been transferred to different workgroups during the selected date range, you can specify whether to report all hours during the date range to the resource's current workgroup, or to report the hours to the workgroup to which the resource belonged at the time the hours were entered.
- **Report all time to the user's current Workgroup**

Example

John worked in Development from 07/01/2001 06/30/2001 and had 45 unapproved hours. John transferred to Marketing on 07/01/2001 (where he still works) from 07/01/2001 to 12/31/2001 he had 45 unapproved hours.

Consider the following reports:
a. Dept. = Marketing (John's current workgroup); Date Range = 01/01/2007 to 12/31/2007; Select Report all time to the user's current workgroup.

Total hours = 90 (all hours in the date range attributed to his current workgroup, i.e., Marketing)

    b.   Dept. = Marketing; Date Range = 01/01/2007 to 12/31/2007; Clear (do no select) Report all time to the user's current workgroup

Total hours = 45 (only hours from when he actually worked in Marketing are displayed)

    c.   Dept. = Development; Date Range = 01/01/2007 to 12/31/2007; Select Report all time to the user's current workgroup

Total hours = 0 (all hours would show as Marketing, but this report is for Development, so 0 hours will show).

    d.   Dept. = Development; Date Range = 01/01/2007 to 12/31/2007; Clear (do no select) Report all time to the user's current workgroup

Total hours =45 (only hours from when he actually worked in Development are displayed).

URL

/Reports/rpUnapprovedTimeByResource.asp

Unbilled Time and Expenses

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **Time and Expense Reports** category and click **Unbilled Time and Expenses**.

   The **Unbilled Time and Expenses by Company** report displays in the Details view.

Intended Audience

- Engagement/Project Managers, Finance

Purpose

This report is a review of all time and expenses which have not yet been included on an invoice. This report includes all amounts which are approved and otherwise ready to be invoiced.

Display Details

Report Header

- Summary of selections: companies selected, engagements selected, projects selected, currency selected
- Reporting period:
- Billing Office for fiscal period setup, fiscal years selected, fiscal periods selected or start date, end date

Report Data

- Company name. Click the plus icon to expand the list.

- Project name. Click the plus icon to expand the list.

Time:

- Date entered
- Resource name
- Billing rate (from time table — hourly billing rate, or daily billing rate divided by the resources hours per day, or zero if not populated; converted to the currency selected for the report)

Note: If the billing rate displays as -1, the Update Time Rates job could not find a billing rate for that record. Check the engagement billing rates or task assignment information and make any edits required. Once edits have been made, the rate will be revised the next time the job runs.

- Number of hours
- Amount (hours X billing rate)
- Currency
- Task name
- Description
- Total amount for project time

Expenses:

- Date
- Resource name
- Amount of expense (converted to the report currency)
- Task name
- Description
- Total expenses for project
- Total amount and hours for the company, total expenses for the company

System-Defined Criteria

- Approved, non-invoiced expenses
- This includes time that has been approved and is waiting to be billed

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Note: If time is subsequently desubmitted, it will not be included on the report.

User-Specified Criteria

- Company name
- Engagement name

Note: If split billing is used, phantom engagements are included in the drop-down list and available for selection.

- Project name
- Currency
- Select **Date Range** or **Fiscal Period**

Date Range:
- Start date
- End date

Fiscal Period:
- Billing Office for fiscal period setup (will be suppressed if only one billing office has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

- Include request time

URL

/Core/Report/vwNInvTimeAndExpenseByClient.asp

CHAPTER 15
System Management Reports

System Administration Category

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens. In the Reports tree view, all available reports are listed and can be sorted by category or by report only (alphabetically).

2. Expand the **System Administration** category.

   The following reports are included under the **System Administration** category:
   - "Features Assigned to a User" on page 195
   - "Pending Resources" on page 196
   - "Pending Resources" on page 196
   - "System Metadata" on page 197
   - "System Reports with Descriptions" on page 198
   - "System Reports with URLs" on page 199
   - "System Terminology" on page 200
   - "Time Locking by Resource" on page 201

Features Assigned to a User

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **System Administration** category and click **Features Assigned to a User**.

   The **Assigned Features** report displays in the Details view.

Intended Audience

- System Managers

Purpose

This report lists which features have been assigned to specified resource.

Display Details

- Resource (employee) name

For each resource:

- Category name

- Feature name

- Feature description

- How the feature was assigned to the resource—directly or through a role, and if through a role, which role.

The Base User License feature is not displayed in the report for the chosen resource because the Base User License cannot be assigned and unassigned explicitly. It is used in the Enterprise backend for licensing.

This feature is different from all other features in that it isn't associated with any category. The Feature Assigned to a Resource report actually displays all the features assigned to a specific resource, grouped by the category. Since The Base User License feature is not associated with any category, it does not display in the report.

System-Defined Criteria

- All features specified for the selected resources.

User-Specified Criteria

- Workgroups from which you want to select a resources

- Resource names

URL

/Reports/rpRolesFeaturesAssigned.asp

Pending Resources

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **System Administration** category and click **Pending Resources**.
   The **Pending Resource changes** report displays in the Details view.

Intended Audience

- System Managers or Human Resources Managers

Purpose

This report shows pending resource changes, i.e., what upcoming effective date changes will be affect resources in selected workgroups.

Display Details

Department Changes

- Global Workgroup (division)

- Workgroup (department)

- Resource name
- Type of change (Activated/Unassigned/Transfer/Termination)
- Effective date of change
- Created on (date the change was entered on the resource profile)
- Creator (user that made the change to the resource profile)

Other Changes

- Global Workgroup (division)
- Workgroup (department)
- Resource name
- Report to (new Report To name or "no change")
- Time Approver (new Time Approver name or "no change")
- Expense Approver (new Expense Approver name or "no change")
- Resource Title (new Title or "no change")
- Function (new primary function or "no change")
- Effective date of change
- Created on (date the change was entered on the resource profile)
- Creator (user that made the change to the resource profile)

System-Defined Criteria

- Selects resource profiles in the selected workgroups that have changes specified for future effective dates.

User-Specified Criteria

- Global Workgroup (division)
- Workgroup (department)

URL

/Reports/rpPendingResources.asp

System Metadata

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **System Administration** category and click **System Metadata**.

   The **Metadata Summary** report displays in the Details view.

Intended Audience

- Database Administrator (DBA) or System Administrator

Purpose

This report lists fields and their corresponding validation parameters, which were set and/or changed to meet the needs of the specific installation. The fields and their validation parameters are grouped by entity and sorted by field.

Display Details

- Report Date
- Entity
- Field name
- Mandatory (check = yes, blank = no)
- Not Editable (check = yes, blank = no)
- Locked After Entry (check = yes, blank = no)
- Hidden
- Minimum
- Maximum
- PCID
- Field Label
- Duplicate Checking (blank = no, or warning, or reject)
- Table
- Column

System-Defined Criteria

- All fields and their validation parameters.

User-Specified Criteria

- None

URL

/Reports/rpMetadata.asp

System Reports with Descriptions

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **System Administration** category and click **System Reports with Descriptions**.

   The **Reports by Category with Description** report displays in the Details view.

Intended Audience

- System Managers

Purpose

This reports lists all reports in the system by category, name and description.

Display Details

- Module/Category
- Report name
- Report descriptions

System-Defined Criteria

- None

User-Specified Criteria

- None

URL

/Reports/rpLinkDisplaysReport.asp

System Reports with URLs

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.

   The Reports tree view opens.

2. Expand the **System Administration** category and click **System Reports with URL**.

   The **Reports by Category with URL** report displays in the Details view.

Intended Audience

- System Managers

Purpose

This reports lists all reports in the system by category, name and URL for the report.

Display Details

- Module/Category

- Report name
- URL

System-Defined Criteria

- None

User-Specified Criteria

- None

URL

/Reports/rpLinkDisplaysReportURL.asp

System Terminology

1. The Reports tree view can be accessed through two methods:
   - In the Applications bar, expand the My Applications section and click **Reports**.
   - In the Folders view, click **Folders** and select **Reports**.
   The Reports tree view opens.
2. Expand the **System Administration** category and click **System Terminology**.
   The **System Terminology** report displays in the Details view.

Intended Audience

- System Managers

Purpose

This report lists all of the system terminology in Changepoint with the original field name and the associated label.

Display Details

- Category
- Title (field name)
- Definition (field label)

System-Defined Criteria

- None

User-Specified Criteria

- None

URL

/Reports/rpTitleDefinitions.asp

Time Locking by Resource

Intended Audience

- System Administrators

Purpose

This report allows System Administrators to lock specific time records.

Display Details

- Hours
- Week Day
- Date
- Resource name
- Task

System-Defined Criteria

- All criteria selected for the selected resources.

User-Specified Criteria

- Global Workgroup
- Workgroup from which you want to select a resource
- Resource names
- Start Date
- End Date

URL

/Core/Report/vwLockTimeByResource.asp

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