



# Changepoint

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## Reports Dictionary by Category Reference

Release 2010

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Changepoint 2010

Reports Dictionary by Category Reference

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# CHAPTER 1

## Reports Dictionary by Category Introduction

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### 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*.
- Portfolio Management Reports - For information on Candidate Analysis and Scenario Screening, see the “Scenario Comparisons Worksheet” chapter in the *Portfolio Management User Guide*.



## CHAPTER 2

# Budget Management Reports

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### 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

- Initiative/Project Managers, Finance

#### Purpose

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

#### Display Details

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

- Project name
- Total for Services
- Total for Project
- Total for Initiative

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

**Services:**

- Staffing Level
- Resource name
- Start date
- End date
- Hours
- Cost rate
- Extended cost
- Charge rate
- Extended charge amount
- Margin
- Revision date
- Revision number
- Comments
- Total Services
- Total for Initiative

**Expenses:**

- Category
- Type
- Date
- Chargeable
- Quantity
- Cost
- Extended Cost
- Expense Multiplier
- Extended Charge Amount
- Margin
- Revision Date
- Revision Number
- Comments

**Fixed Fees:**

- Deliverable
- Date
- Hours
- Cost

- Extended Cost
- Charge Amount
- Margin
- Revision Date
- Revision Number
- Comments

**Non-Labor Items:**

- Category
- Non-Labor Item
- Date
- Quantity
- Cost
- Extended Cost
- Charge Amount
- Extended Charge 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 **Initiative 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:**

- Staffing Level
- Resource name
- Start date

- End date
- Hours
- Cost rate
- Extended cost
- Charge rate
- Extended charge amount

**Expenses:**

- Category
- Type
- Date
- Chargeable
- Quantity
- Cost
- Extended cost
- Expense multiplier
- Extended charge amount

**Fixed Fees:**

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

**Non-Labor Items:**

- Category
- Non-Labor Item
- Date
- Quantity
- Cost
- Extended cost
- Charge amount
- Extended charge amount

---

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

---

## System-Defined Criteria

- **Initiative only, by item** selects all budget items for the selected initiative 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, non-labor items, and expenses).
- **Initiative only, by revision** selects all budget items for the selected initiative and displays one section per revision, showing the changes between each revision number.
- **Initiative and project, by revision** shows services, expenses, non-labor item 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.)
- **Initiative and project, by project** and **by item** selects all budget items for the selected initiative 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, non-labor item, expenses).

## User-Specified Criteria

- Options
- Client name
- Initiative
- 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

- Initiative/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

- Client name

- Initiative
- Initiative currency
- Project

For sections, see the System-Defined Criteria.

If split charges are used, the report will include cross charged amounts for the phantom initiative and the main initiative.

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

### System-Defined Criteria

- The **Initiative only** selection shows the most current revision for the initiative, sorted into sections based on type (services, non-labor item, fixed fee, expenses).
- The **Services** section, shows one row per budgeted resource/staffing level combination, with all budgeted and actual information summarized.
- **Actuals** will be based on the status chosen (entered, submitted, approved or cross charged) 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 cross charged time, while approved time would be only approved plus cross charged).

---

- If there are **actuals and no budget**, there will be a row showing the actual data with zero budgeted data.
- For **Revenue** calculation for cross charged status, select cross charged time. For revenue calculation for entered, submitted or approved status, select from time, apply the cross charge logic to get the charge 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 cross charged status, select cross charged expenses. For revenue calculation for entered, submitted or approved status, select expenses at the chosen status, applying the chargeable flag (yes or no) and the percent of expenses as specified on the initiative.
- For **Non-Labor Items**, actual revenue will be based on the non-labor items specified on the initiative's non-labor item tab. If entered, submitted or approved status is chosen, all non-labor items will show as revenue; if cross charged is chosen, only those non-labor items which have been cross charged will be shown. For cost, the materials table is used, and will be summarized to the non-labor item category/non-labor item. 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 cross charged status is shown, only cross charged 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, cross charged).



- The **Initiative 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 Initiative Charge Rates dialog box is selected.

Overtime cost rates are determined as follows.

**Scenario 1**—The Resource Cost Rate setting is specified for the Cost Structure:

- If the resource only is specified in the Initiative Charge Rates dialog box and the resource only (no staffing level) is specified in the task assignment, the initiative overtime cost rate entered for the resource in the Initiative Charge Rates dialog box as the overtime cost rate.
- If both the resource and staffing level are specified in the Initiative Charge Rates dialog box and in the task assignment, the initiative overtime cost rate entered for the resource and staffing level combination in the Initiative Charge Rates dialog box is used as the overtime cost rate.
- If only the staffing level is specified in the Initiative Charge Rates dialog box and the resource and staffing level are specified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).
- If only the staffing level is specified in the Initiative Charge Rates dialog box (i.e., no resource), and only the resource is specified in the task assignment (i.e., no staffing level), the overtime cost rate in the Resource Profile is used (with no multiplier).
- If the Initiative Charge Rates dialog box is left blank (i.e., no staffing level or resource is specified), and therefore no staffing level is identified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

**Scenario 2**—The Staffing Level Cost Rate setting is specified for the Cost Structure

- If the resource only is specified in the Initiative Charge Rates dialog box and the resource only (no staffing level) is specified in the task assignment, the initiative overtime cost rate entered for the resource is used as the overtime cost rate.
- If both the resource and staffing level are specified in the Initiative Charge Rates dialog box and in the task assignment, the initiative overtime cost rate entered for the resource and staffing level combination is used as the overtime cost rate.
- If only the staffing level is specified in the Initiative Charge Rates dialog box, and the resource and staffing level are specified in the task assignment, the initiative overtime cost rate entered for the staffing level is used.
- If only the staffing level (i.e., no resource) is specified in the Initiative Charge Rates dialog box, and only the resource is specified in the task assignment (i.e., no staffing level), the zero overtime cost rate is used.
- If the Initiative Charge Rates dialog box is left blank (i.e., no staffing level or resource is specified), and therefore no staffing level can be identified in the task assignment, the zero overtime cost rate is used.

**User-Specified Criteria**

- Client name
- Initiative

---

**Note:** If split charges are used, phantom initiatives are not available for selection. However, the report will include cross charged amounts for the phantom initiative and the main initiative.

---

- 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**

- Initiative/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**

- Client name
- Initiative
- Project name
- Initiative status
- Start date
- End date
- Currency
- Month/year

- Budgeted and Actual hours
- Budgeted and Actual extended cost
- Budgeted and Actual extended charge amount

---

**Note:** If split charges are used, the report will include cross charged amounts for the phantom initiative and the main initiative.

---

Since time is tracked against the master initiative, only the master is available for selection. Otherwise, the report would display the cross charged amounts for the phantom initiatives, but no cost information. Since that would be misleading, the master initiative displays all cross charged amounts (including amounts for phantom initiatives) 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, non-labor items and fixed fees.
- For services, they will be based on spreading the hours across the start and finish dates, applying the charge rate to arrive at the revenue amount.
- Costs for services will be based on the dates of the time entries selected.

### User-Specified Criteria

- Client name
- Initiative

---

**Note:** If split charges are used, phantom initiatives are not available for selection. However, the report will include cross charged amounts for the phantom initiative and the main initiative.

---

- Project
- Initiative 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

- Initiative/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
- Staffing Level
- 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 charges are used, the report will include cross charged items for the phantom initiative and the main initiative.

---

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

### System-Defined Criteria

- The **Initiative only** selection shows the most current revision for the initiative, sorted into sections based on type (services, non-labor item, fixed fee, expenses).
- The **Services** section, shows one row per budgeted resource/staffing level combination, with all budgeted and actual information summarized.
- **Actuals** will be based on the status chosen (entered, submitted, approved or cross charged) 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 cross charged time, while approved time would be only approved plus cross charged).
- 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 **Non-Labor Items**, if submitted or approved status is chosen, all non-labor items will show; if cross charged is chosen, only those non-labor items which have been cross charged will be shown. For cost, the materials table is used, and will be summarized to the non-labor item category/non-labor item. Materials have no particular status, so will be shown for all statuses chosen.
- For the **Fixed Fee** section, if the cross charged status is shown, only cross charged 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, cross charged).
- The **Initiative and project** 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

- Client name
- Initiative

---

**Note:** If split charges are used, phantom initiatives are not available for selection. However, the report will include cross charged items for the phantom initiative and the main initiative.

---

- 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

- Initiative/Project Managers, Finance

## Purpose

To show revenue broken down by fixed fee item.

## Display Details

- Client
- Initiative
- Fixed fee name
- Fixed fee amount
- Initiative currency

## System-Defined Criteria

- If the cross charged status is shown, only cross charged 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 cross charged).

## User-Specified Criteria

- Client name
  - Initiative
  - 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 charge rate and cost rate for the resource on the project. If the Update Time Rate scheduled job has not run, then the charge 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 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 lists the Changepoint entities that are missing a required funding source association.

## Display Details

### Projects:

- Name
- Project Manager
- Associated Initiative
- Client
- Status
- Planned Hours
- Actual Hours
- Remaining Hours
- Total Hours

### Candidates:

- Description
- Client
- Budget Total
- Currency
- Status



**Requests:**

- Type
- Number
- Priority
- Status
- Description

**User-Specified Criteria**

- Entity type
- Status
- Client
- Initiative
- Created by
- Created after



## CHAPTER 3

# Client Management Reports

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### Client Management Category

The following reports are included under Client Management:

- “All Clients” on page 27
- “Client Hierarchy” on page 28
- “Client Radar” on page 28
- “Client Reference” on page 30
- “Client Financial Analysis Summary” on page 30

### All Clients

#### Intended Audience

- All users

#### Purpose

This report provides a listing of clients within the system.

#### Display Details

##### Report Header

- Location included in the report
- Account Types included in the report
- Client Status included in the report

##### Report Data

- Client (with links to client details)
- Address
- Location

#### System-Defined Criteria

- Clients matching selection criteria

#### User-Specified Criteria

- Location
- Account Type

- Status

**URL**

/Reports/rpListCompanies.asp

## Client Hierarchy

**Intended Audience**

- All users

**Purpose**

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

**Display Details**

- Client name (with links to client details)
- Level in hierarchy

**System-Defined Criteria**

- None

**User-Specified Criteria**

- None

**URL**

/Core/Customer/rpCustomerHierarchy.asp

## Client Radar

**Intended Audience**

- Client Managers

**Purpose**

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

For example, you can review results for client for a specific location or for a specific Client Manager, or compare results across those areas.

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

## Display Details

### Report Heading:

- Department type included in the report
- Location included in the report
- Account status included in the report
- Account Manager included in the report

### For each client (one per row in the report):

- Client 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 candidates associated with the client
- Revenue Forecast

### Current Status:

- Number of active projects associated with the client
- Sales Reference (is the client a sales reference? Yes/No)
- Client satisfaction rating (calculated using survey data from Survey Management)
- Account Manager

## System-Defined Criteria

- Compares clients 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.
- Clients for which **Calculate report card** has been selected on the Client dialog box.

## User-Specified Criteria

- Department Type
- Location
- Status (account status)
- Account Manager

## URL

/reports/rpCustomerRadar.asp

## Client Reference

### Intended Audience

- Client Representatives

### Purpose

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

### Display Details

- Client name (with links to client details)
- Contact name
- Phone Number
- E-mail address

### System-Defined Criteria

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

### User-Specified Criteria

- None

### URL

/Reports/rpListReferenceCompanies.asp

## Client Financial Analysis Summary

### Intended Audience

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

### Purpose

This report shows monthly charge, cost and margin amounts for past and future, by client.

### Display Details

- Client
- Currency
- Monthly Charge Amount
- Monthly Cost Amount
- Monthly Margin Amount

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

**System-Defined Criteria**

- Date

**User-Specified Criteria**

- Candidate
- Candidate Category
- Candidate Client Manager
- Candidate Source
- Candidate Status
- Client
- Client Account Manager
- Client Account Type
- Client Department Type
- Client Manager
- Currency
- Date
- Initiative Category
- Initiative Manager
- Initiative Status
- Initiative
- Location





## CHAPTER 4

# Portfolio Management Reports

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### Objective Analysis Category

The following reports are included under Objective Analysis:

- “Objectives by Frequency” on page 33
- “Rejected Candidates by Objective” on page 34
- “Candidate Decision: Approved” on page 35

### Objectives by Frequency

#### Intended Audience

- Client and Project Managers

#### Purpose

This report contains the frequency at which an objective is involved in candidates and also contains statistics related to the approved/rejected ratios.

#### Display Details

- Objective name (sorted alphabetically)
- Number of Candidates (number of deals an objective was involved in)
- Frequency (number of contracts involved in divided by total number of deals with identified objectives)
- Approved (percentage of Number of Approved status divided by Involved in field)
- Rejected (percentage of Number of Rejected 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 candidates with identified competitors

#### System-Defined Criteria

- Candidates in the system with an objective identified and an outcome

#### User-Specified Criteria

- None

#### URL

/Reports/rpViewCompByFrequency.asp

## Rejected Candidates by Objective

### Intended Audience

- Client and Project Management

### Purpose

This report provides a list of all candidates that were rejected.

### Display Details

#### Report Header

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

#### Report Data

- Client name
- Candidate name
- Client Manager
- Decision date
- Revenue (converted to the user's base currency)
- Outcome details
- Objectives (chosen objective has an asterisk, and if none are identified it will be noted as NONE)
- Total Revenue
- Currency

Users can link to information about the client, candidate, client rep. and the objective.

### System-Defined Criteria

- Candidates with status rejected

### User-Specified Criteria

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

#### Date Range:

- Start date
- End date

**Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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 rejected candidates for the workgroups chosen.

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

**URL**

/Reports/rpViewLosses.asp

**Candidate Decision: Approved****Intended Audience**

- Client Management

**Purpose**

This report provides a list of all candidates that were approved.

**Display Details****Report Header**

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

**Report Data**

- Client name
- Candidate name
- Client representative
- Decision date
- Revenue (converted to the user's base currency)
- Objectives
- Total Revenue
- Currency

Users can link to information about the client, candidate, client rep. and the objectives.

**System-Defined Criteria**

- Candidates with status approved

## User-Specified Criteria

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

### Date Range:

- Start date
- End date

### Fiscal Period:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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 approved candidates for the workgroups chosen.

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

## URL

/Reports/rpViewWins.asp

## Candidate Management Category

The following reports are included under Candidate Management:

- “Candidates Decision: Rejected” on page 36
- “Candidates Decision: Approved” on page 37

## Candidates Decision: Rejected

### Intended Audience

Client Management

### Purpose

This report provides a list of all candidates that were rejected.

### Display Details

#### Report Header

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

#### Report Data

- Client name
- Candidate name

- Client Manager
- Decision date
- Revenue
- Total Revenue
- Currency

Users can link to information about the client, candidate, Client rep. and the objectives.

### **System-Defined Criteria**

Candidates with status rejected

### **User-Specified Criteria**

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

#### **Date Range:**

- Start date
- End date

#### **Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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 rejected candidates for the workgroups chosen.

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

### **URL**

/Reports/rpViewLosses.asp

## **Candidates Decision: Approved**

### **Intended Audience**

- Client Management

### **Purpose**

This report provides a list of all candidates that were approved.

### **Display Details**

### **Report Header**

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

### Report Data

- Client name
- Candidate name
- Client representative
- Decision date
- Revenue
- Competitors
- Total revenue
- Currency

Users can link to information about the client, candidate, Client rep. and the objective.

### System-Defined Criteria

- Candidates with status approved

### User-Specified Criteria

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

#### Date Range:

- Start date
- End date

#### Fiscal Period:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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 approved candidates for the workgroups chosen.

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

### URL

/Reports/rpViewWins.asp

## CHAPTER 5

# Data Archive Reports

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### 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 (client), ENG (initiative), 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—Client, Initiative 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



## CHAPTER 6

# Initiative Management Reports

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### Initiative 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 **Initiative Management** category.

The following reports are included under the **Initiative Management** category:

  - “All Initiatives by Client” on page 41
  - “Initiative Financial Analysis” on page 42
  - “Initiatives by Manager” on page 45
  - “Initiative Workload” on page 46
  - “Work in Progress Report” on page 47

### All Initiatives by Client

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 **Initiative Management** category and click **All Initiatives by Client**.

The **All Initiatives by Client** report displays in the Details view.

#### Intended Audience

- Initiative Managers, Project Managers, Finance, Sales Personnel

#### Purpose

This report provides a listing of initiatives, filtered by cost structure and initiative status, for selected clients.

#### Display Details

##### Report Heading:

- Cost Structures included in the report
- Clients included in the report
- Initiative status included in the report

##### For each initiative:

- Client name
- Initiative name
- Initiative status

### System-Defined Criteria

- Sorted by client name and initiative name

### User-Specified Criteria

- Cost Structure
- Client
- Initiative status

### URL

/Reports/rpDisplayCompanies.asp

## Initiative 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 **Initiative Management** category and click **Initiative Financial Analysis**.  
The **Initiative Financial Analysis** report displays in the Details view.

### Intended Audience

- Initiative Managers, Finance, Directors

### Purpose

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

### Display Details

- Month: (calendar month)
- **Direct Costs Section:**
  - Invoiced Amount: Invoiced amount for time, request time, expenses, fixed fees, non-labor items and additional items, write-offs and adjustments (the “total adjustment” field on the time, expense and additional items on a cross charge), excluding taxes, converted to the selected currency. Records included from the cross charge table for cross charges with Approved, Committed, Sent, Partial Paid, Paid or Archived status. Groupings per month will be based on the cross charge date.
  - Labor: Labor cost associated with the cross charged amounts (see the cross charged amount section above). Selects time associated with each cross charge from the time table, applies the hourly cost from the time table to the hours and converts to the selected currency. For a daily initiative, 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 a cross charge, the cost for the fixed fee time will be included once the associated fixed fee has been cross charged. Groupings per month will be based on the cross charge date of the associated cross charge on which the record was selected.

- Expenses: expense cost associated with the cross charged amounts (see cross charged amounts section, above). Selects expenses associated with each cross charge 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 cross charge date of the associated cross charge.
- Non-Labor Items
- Cost of cross charged non-labor item. Retrieves the non-labor item list from the **Invoiced Product** table for the selected initiative, for non-labor items which are associated with Approved, Committed, Sent, Partial Paid, Paid or Archived cross charges. If materials transactions exist for the non-labor item, 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 non-labor item, use the cost from the initiative non-labor item (converted to the selected currency) multiplied by the cross charged quantity. Groupings per month will be based on the cross charge date of the associated cross charge. Costs for material transactions will only appear if the associated non-labor item has been cross charged.
- **Non-Chargeable Costs Section:**
  - Labor (cost of approved, non-chargeable time for each month): Selects approved time associated with non-chargeable tasks. Takes the hourly cost in the time table, converts to the selected currency and multiplies by the number of hours. The cost of non-chargeable overtime hours per the “overtime cost rules” as outlined below is included. For a daily initiative, 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 non-chargeable. In that case, the time will appear in the non-chargeable costs section, and it will not be necessary to select it on a cross charge.
  - Expenses: Cost of approved, non-chargeable 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.
  - Non-Labor Items: Cost of material transactions for any non-labor items not included in the charged non-labor items total (see non-labor item 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 initiative. Groupings per month will be based on the material date.
  - Margin Value: should be cross charged amount minus labor, expenses, non-labor items, non-chargeable labor, non-chargeable expenses and non-chargeable non-labor items.

Overtime cost will be determined as follows:

#### **Scenario 1 – The Resource Cost Rate setting is specified on the Cost Structure**

- If the Resource only is specified on the initiative charge rates dialog box and the resource only (no staffing level) is specified on the task assignment, then the initiative overtime

cost rate entered for the resource on the initiative charge rates tab is used as the overtime cost rate.

- If both the resource and staffing level are specified on the initiative charge rates dialog box and on the task assignment, then the initiative overtime cost rate entered for the resource and staffing level combination on the initiative charge rates tab is used as the overtime cost rate.
- If only the staffing level is specified on the initiative charge 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 staffing level is specified on the initiative charge rates dialog box (i.e., no resource), and only the resource is specified on the task assignment (i.e., no staffing level), then the overtime cost rate on the Resource Profile is used (with no multiplier).
- If the initiative charge rates dialog box is left blank (i.e., no staffing level or resource is specified), and therefore no staffing level is identified on the task assignment, then the overtime cost rate on the Resource Profile is used (with no multiplier).

#### **Scenario 2 – The Staffing Level Cost Rate setting is specified on the Cost Structure**

- If the Resource only is specified on the initiative charge rates dialog box and the resource only (no staffing level) is specified on the task assignment, then the initiative overtime cost rate entered for the resource is used as the overtime cost rate.
- If both the resource and staffing level are specified on the initiative charge rates dialog box and on the task assignment, then the initiative cost rate entered for the resource and role combination is used as the overtime cost rate.
- If only the staffing level is specified on the initiative charge rates dialog box, and the resource and role are specified on the task assignment, then the initiative overtime cost rate entered for the Staffing Level is used.
- If only the staffing level is specified on the initiative charge rates dialog box, and only the resource is specified on the task assignment (i.e., no staffing level), then the cost rate and overtime cost rate is used (with no multiplier).
- If the initiative charge rates dialog box is left blank (i.e., no staffing level or resource is specified), and therefore no staffing level can be identified on the task assignment, then the zero cost rate and the zero overtime cost rate is used.

#### **User-Specified Criteria**

- Client
- Initiative
- 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.

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- Currency
- Include request time
- Include cost of cross charged items

## URL

/Reports/rpEngagementProfit.asp

## Initiatives 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 **Initiative Management** category and click **Initiatives by Manager**.  
The report displays in the Details view.

## Intended Audience

- Initiative Managers, Finance, Resource Managers

## Purpose

This report contains a full listing of selected initiatives with pertinent data on each initiative. Initiatives displayed are filtered by workgroup, Initiative Manager and initiative status.

## Display Details

### Report Heading:

- Workgroups included in the report
- Resource names - which Initiative Managers are included in the report
- Initiative status included in the report

### For each initiative:

- Initiative manager
- Reference number
- Date created
- Last updated
- Client name
- Initiative
- Department Type
- Approved amount

- Consulting start date
- Initiative status
- Description

### System-Defined Criteria

- Sort by Initiative Manager

### User-Specified Criteria

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

### URL

/Reports/rpPipeline.asp

## Initiative 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 **Initiative Management** category and click **Initiative Workload**.  
The **Initiative Workload** report displays in the Details view.

### Intended Audience

- Initiative Managers, Resource Managers, Staffing Personnel

### Purpose

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

### Display Details

- **Bench Report** – list of all resources with no initiative 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 initiative assignments that are not assigned
- **Staffing Positions Report** – list of projected resource requests for all initiatives 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 Initiative 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 **Initiative Management** category and click **Work in Progress**.  
The **Work in Progress** report displays in the Details view.

**Intended Audience**

- Initiative Managers, Project Managers, Finance

**Purpose**

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

**Display Details****Report Header**

- Report date
- Client name
- Initiative name
- Department Type (from the client)
- Client Manager (from the client)
- Initiative Category (from the initiative)
- Approved Amount (from the initiative)
- 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 chargeable 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
- Charge amount
- Charge date
- Charged
- Hours worked
- Realization
- Total hours
- Total charge amount

See System-Defined Criteria for details.

**Cross Charge Information section**



- Cross Charge number
- Cross Charge date
- Cross Charge amount

If split charges are used, the report will include cross charged amounts for the phantom initiative and the main initiative.

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

- Amount outstanding (cross charge 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 initiative 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 initiatives, 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 Initiative Charge Rates dialog box, overtime hours are also included in the cost, and rates are determined based on either the staffing level, resource, or combination of the two that are specified in the initiative and task (see the "Overtime Cost Rates" section on page 50 and the "Overtime Charges" section on page 51).

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**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 "Cost Structures" section in the "Financial Management" chapter in the *System Manager Administration Guide*.

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- **Cost accumulation – Expenses** section:

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

- **Revenue (for time and expenses chargeable 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 chargeable and not associated with a fixed fee. For each task/resource, the system takes the hourly charge rate from the time table (converted to the initiative currency based on the time date) and multiplies by the number of hours to arrive at total revenue entered (but not necessarily cross charged) for the date range selected. The charge 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 charge rates are found for the same resource/task, a blended rate will be displayed, and if no charge 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 initiatives, the charge 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 Initiative Charge Rates dialog box, overtime hours are also included in the cost, and rates are determined based on either the staffing level, resource, or a combination of the two that are specified in the initiative and task (see the "Overtime Cost Rates" section on page 50 and the "Overtime Charges" section on page 51).
- **Fixed Fee Realization** section:  
Selects fixed fee deliverables with a charge 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 charge amount by the number of hours to arrive at a realized charge rate.  
The purpose of this section is to allow a comparison of the realized charge rate for the fixed fee with the charge rates for chargeable tasks.
- All hours are used in the calculation, not only hours within the date range selected.
- **Cross Charge Information** section:  
Selects cross charges that have cross charge 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 Initiative Charge Rates dialog box is selected.

---

**Scenario 1**—The Resource Cost Rate setting is specified for the Cost Structure:

- If the resource only is specified in the Initiative Charge Rates dialog box and the resource only (no staffing level) is specified in the task assignment, the initiative cost rate entered for the resource in the Initiative Charge Rates dialog box multiplied by the initiative overtime percentage is used as the overtime cost rate.
- If both the resource and staffing level are specified in the Initiative Charge Rates dialog box and in the task assignment, the initiative cost rate entered for the resource and staffing level combination in the Initiative Charge Rates dialog box, multiplied by the initiative overtime percentage, is used as the overtime cost rate.
- If only the staffing level is specified in the Initiative Charge Rates dialog box and the resource and staffing level are specified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

- If only the staffing level is specified in the Initiative Charge Rates dialog box (i.e., no resource), and only the resource is specified in the task assignment (i.e., no staffing level), the overtime cost rate in the Resource Profile is used (with no multiplier).
- If the Initiative Charge Rates dialog box is left blank (i.e., no staffing level or resource is specified), and therefore no staffing level is identified in the task assignment, the overtime cost rate in the Resource Profile is used (with no multiplier).

**Scenario 2**—The Staffing Level Cost Rate setting is specified for the Cost Structure

- If the resource only is specified in the Initiative Charge Rates dialog box and the resource only (no staffing level) is specified in the task assignment, the initiative overtime cost rate entered for the resource is used as the overtime cost rate.
- If both the resource and staffing level are specified in the Initiative Charge Rates dialog box and in the task assignment, the initiative overtime cost rate entered for the resource and staffing level combination is used as the overtime cost rate.
- If only the staffing level is specified in the Initiative Charge Rates dialog box, and the resource and staffing level are specified in the task assignment, the initiative overtime cost rate entered for the Staffing Level is used.
- If only the staffing level (i.e., no resource) is specified in the Initiative Charge Rates dialog box, and only the resource is specified in the task assignment (i.e., no staffing level), the zero overtime cost rate is used.
- If the Initiative Charge Rates dialog box is left blank (i.e., no staffing level or resource is specified), and therefore no staffing level can be identified in the task assignment, the zero overtime cost rate is used.

### Overtime Charges

Overtime charge rates are determined by the Include overtime hours check box Initiative Charge 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 Charge Rate = Regular Time Charge Rate (from the time table)\* Overtime percentage/100

The overtime charge rate is the charge 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 charged at \$200 / hour

If 150.00% was entered, then overtime would be charged at \$300 / hour

If 0.00% was entered, then overtime would be charged at \$0 / hour

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

---

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

---

### User-Specified Criteria

- Client name

- Start date
- End date
- Initiative

---

**Note:** If split charges are used, phantom initiatives are not available for selection. However, the report will include cross charged amounts for the phantom initiative and the main initiative.

---

#### URL

/Reports/rpWorkInProgress1.asp

## CHAPTER 7

# Performance Management Reports

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### Performance Management Category

The following reports are included under the Performance Management category:

- “Project Portfolio Lifecycle Report” on page 53
- “Assignment by Metric” on page 54
- “Assignment by Workgroup” on page 55
- “Metric Assignments” on page 55

### Project Portfolio Lifecycle Report

#### Intended Audience

Initiative Managers, Project Managers

#### Purpose

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

#### Display Details

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

- Request Total Cost

### **System-Defined Criteria**

- Metric type

### **User-Specified Criteria**

- Client
- Initiative
- 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” on page 57
- “Employee Phone List by Workgroup” on page 58
- “Expense Reports Approved/Rejected by Me” on page 59
- “My Contacts” on page 59
- “My Expense Reports” on page 60
- “My Knowledge Items” on page 61
- “My Tasks” on page 62
- “Personal Vacation Time” on page 63
- “Unsubmitted Time” on page 64
- “Weekly Time Sheet” on page 64

### 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
- Initiative
- Client 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
- Client 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
- Client name
- Initiative
- Comments
- Amount Total
- Date of creation

Click a link to move to:

- Report
- Client
- Initiative

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

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### 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 67
  - “Earned Value Report” on page 68
  - “Inter-Project Dependencies” on page 70
  - “Milestone Report” on page 71
  - “Task Completion” on page 72
  - “Progress by Project” on page 73
  - “Project Progress All” on page 74
  - “Task Slippage by Project” on page 75
  - “Project Status by Phase” on page 76
  - “Project Summary by Resource” on page 77
  - “Projects by Status and Client” on page 78
  - “Projects by Status and Project Manager” on page 79
  - “Resource Functions” on page 80
  - “Resources by Task” on page 81
  - “Task Status Compliance” on page 82
  - “Tasks in Progress or Scheduled to Start” on page 83
  - “Tasks Scheduled to Finish in Two Weeks” on page 84

### 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 *Initiative Management User Guide*.

**Intended Audience**

- Project Managers, Initiative Managers

**Purpose**

This report provides a quick and simple way to set up all required records so that time can be entered promptly. An initiative, 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 *Initiative Management User Guide*.

**System-Defined Criteria**

None

**User-Specified Criteria**

- Initiative 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
- Client 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, Initiative 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, Initiative 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
- $\text{Scheduled Variance} = \text{Actual} + \text{Remaining} - \text{Planned}$

### 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, Initiative 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 Initiative 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

- Clients 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**

- Client 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, Initiative 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, Initiative 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

- Client name
- Initiative 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, Initiative 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 Client**

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

**Intended Audience**

- Project and Initiative Managers, Finance

## Purpose

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

## Display Details

### Report Header

- Clients included in this report
- Project status included in this report

### Report Data

- Client name
- Project name
- Project Manager
- Project status
- Initiative name

### System-Defined Criteria

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

### User-Specified Criteria

- Client 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, Initiative 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**

- Client name
- Project name
- Project Manager
- Project status
- Initiative 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, Initiative 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

- Client name
- Initiative 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, Initiative 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, Initiative 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

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### Recruitment Management Category

The following reports are included under Recruitment Management:

- “Active Staffing Requests” on page 87
- “Staffing Candidate Source” on page 88
- “Vendor Report Card” on page 88

### Active Staffing Requests

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

#### Intended Audience

Human Resources, Resource Managers, Initiative 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 clients that have the **Staffing Vendor** check box selected on the Client 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

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### Request 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 **Request Reports** category.

The following reports are included under the Request Reports category:

- “All Requests by Assignee” on page 92
- “All Requests by Client” on page 93
- “All Requests by Application” on page 94
- “All Requests by Request Type” on page 95
- “All Requests by Status” on page 96
- “Bugs Reports” on page 97
- “Inactive Requests by Application” on page 98
- “My Queues” on page 99
- “My Request Assignments” on page 100
- “Open Requests by Assignee” on page 100
- “Open Requests by Category” on page 101
- “Open Requests by Client” on page 102
- “Open Requests by Date” on page 103
- “Open Requests by Initiator” on page 104
- “Open Requests by Priority” on page 105
- “Open Requests by Application” on page 106
- “Public Support Items” on page 107
- “Request Summary” on page 108
- “Support Items by Type” on page 109
- “Suspended Requests” on page 110
- “Unapproved Support Items” on page 111
- “Unassigned Requests by Open Date” on page 112
- “Unassigned Requests by Priority” on page 112

## 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 **Request Reports** category and click **All Requests by Assignee**.

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

### Intended Audience

- Operations Center Managers, Operations Center Personnel

### Purpose

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

### Display Details

- Request type
- Request status
- Request number
- Initiator
- Client 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

- Operations Center
- Assignee

### URL

/HelpDesk/rpAllRequestByAssignee.asp

## All Requests by Client

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 **Request Reports** category and click **All Requests by Client**.

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

### Intended Audience

- Operations Center Managers, Operations Center Personnel

### Purpose

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

### Display Details

- Client 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 client
- Grouped request type
- Grouped request status

### User-Specified Criteria

- Operations Center
- Client name

### URL

/HelpDesk/rpAllRequestsByCustomer.asp

## All Requests by Application

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 **Request Reports** category and click **All Requests by Application**.  
The **All Requests by Application** report displays.

### Intended Audience

- Operations Center Managers, Operations Center Personnel

### Purpose

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

### Display Details

- Application. 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 application
- Grouped request type
- Grouped request status

### User-Specified Criteria

- Operations Center
- Application

### 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 **Request Reports** category and click **All Requests by Request Type**.

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

### Intended Audience

- Operations Center Managers, Operations Center 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

- Operations Center
- 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 **Request Reports** category and click **All Requests by Status**.

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

### Intended Audience

- Operations Center Managers, Operations Center 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

- Operations Center
- 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 **Request Reports** category and click **Bug Reports**.

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

### Intended Audience

- Operations Center Managers, Operations Center 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
  - Application

### URL

/HelpDesk/rpBugsSelect.asp

## Inactive Requests by Application

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 **Request Reports** category and click **Inactive Requests by Application**.  
The **Inactive Requests by Application** report displays.

### Intended Audience

- Operations Center Managers, Operations Center Personnel

### Purpose

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

### Display Details

- Application. 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 application
- Requests grouped by category
- Requests grouped by sub-category

### User-Specified Criteria

- Request type
- Operations Center
- Application

### 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 **Request Reports** category and click **My Queues**.

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

### Intended Audience

- Operations Center Managers, Operations Center 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
- Client 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/tpMyQueues.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 **Request Reports** category and click **My Request Assignments**.

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

### Intended Audience

- Operations Center Managers, Operations Center 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
- Client 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 **Request Reports** category and click **Open Requests by Assignee**.  
The **Open Requests by Assignee** report displays in the Details view.

### Intended Audience

- Operations Center Managers, Operations Center 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
- Client name
- Open date
- Description

### System-Defined Criteria

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

### User-Specified Criteria

- Operations Center
- 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 **Request Reports** category and click **Open Requests by Category**.  
The **Open Requests by Category** report displays in the Details view.

**Intended Audience**

- Operations Center Managers, Operations Center 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
- Client 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**

- Operations Center
- Category

**URL**

/HelpDesk/rpOpenRequestsByCategory.asp

**Open Requests by Client**

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 **Request Reports** category and click **Open Requests by Client**.

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

**Intended Audience**

- Operations Center Managers, Operations Center Personnel

## Purpose

This report contains a listing of open requests by client.

## Display Details

- Client 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 client
- Grouped by request type
- Grouped by request status

## User-Specified Criteria

- Operations Center
- Client 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 **Request Reports** category and click **Open Requests by Date**.  
The **Open Requests by Date** report displays in the Details view.

## Intended Audience

- Operations Center Managers, Operations Center 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
- Client name
- Request number
- Description

### System-Defined Criteria

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

### User-Specified Criteria

- Operations Center
- 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 **Request Reports** category and click **Open Requests by Initiator**.  
The **Open Requests by Initiator** report displays in the Details view.

### Intended Audience

- Operations Center Managers, Operations Center 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
- Client name
- Open date
- Description

**System-Defined Criteria**

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

**User-Specified Criteria**

- Operations Center
- 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 **Request Reports** category and click **Open Requests by Priority**.  
The **Open Requests by Priority** report displays in the Details view.

**Intended Audience**

- Operations Center Managers, Operations Center 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
- Client name
- Description

### System-Defined Criteria

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

### User-Specified Criteria

- Operations Center
- Priority

### URL

/HelpDesk/rpOpenRequestsByPriority.asp

## Open Requests by Application

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 **Request Reports** category and click **Open Requests by Application**.  
The **Open Requests by Application** report displays in the Details view.

### Intended Audience

- Operations Center Managers, Operations Center Personnel

### Purpose

This report contains a listing of open requests by application.

### Display Details

- Application. 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 application
- Grouped by request category and sub-category

### User-Specified Criteria

- Operations Center
- Request type
- Application

### 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 **Request 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

- Operations Center Managers, Operations Center 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/tpPublicKBArticles.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 **Request Reports** category and click **Request Summary**.  
The **Request Summary** report displays in the Details view.

### Intended Audience

- Operations Center Managers, Operations Center Personnel

### Purpose

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

### Display Details

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

### System-Defined Criteria

- None

## User-Specified Criteria

- Operations Center
- Resource/Queue (Assigned/Creator/Initiator)
- Group By (Resource/Queue, Client, Type, Priority, Status, Request Category) Ascending/Descending
- Sort By (Request, Resource/Queue, Client, 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 **Request 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

- Operations Center Managers, Operations Center 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 **Request Reports** category and click **Suspended Requests**.  
The **Suspended Requests by Open Date** report displays in the Details view.

### Intended Audience

- Operations Center Managers, Operations Center 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
- Client name
- Initiator
- Description

### System-Defined Criteria

- Displays requests where the suspended flag is checked

### User-Specified Criteria

- Operations Center

**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 **Request 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**

- Operations Center Managers, Operations Center 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 **Request Reports** category and click **Unassigned Requests by Open Date**.  
The **Unassigned Requests by Open Date** report displays in the Details view.

### Intended Audience

- Operations Center Managers, Operations Center 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
- Client name
- Initiator
- Description

### System-Defined Criteria

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

### User-Specified Criteria

- Operations Center

### 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 **Request Reports** category and click **Unassigned Requests by Priority**.  
The **Unassigned Requests by Priority** report displays in the Details view.

**Intended Audience**

- Operations Center Managers, Operations Center 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
- Client name
- Description

**System-Defined Criteria**

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

**User-Specified Criteria**

- Operations Center
- Priority

**URL**

/HelpDesk/rpUnassignedRequestsbyPriority.asp



## CHAPTER 12

# Resource Management Reports

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### 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 Charge by Initiative” on page 115
  - “Chargeable Utilization by Workgroup” on page 117
  - “Cross Charged Hours by Resource” on page 118
  - “Vacation Tracking” on page 119
  - “Responsibility by Resource” on page 121
  - “Open Positions” on page 122
  - “Resource History” on page 124
  - “Resource Requests” on page 125
  - “Workload by Resource” on page 127
  - “Resources by Approver” on page 127
  - “Utilization by Workgroup” on page 128
  - “Resources by Function” on page 131
  - “Resources by Primary Function” on page 132

### Planned Charge by Initiative

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 Charge by Initiative.

The report displays in the Details view.

#### Intended Audience

- Finance

#### Purpose

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

## Display Details

### Planned Charge Amount:

- Initiative name
- approved amount
- Currency

### Week Beginning:

- Date

### Total:

- Initiative 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 (chargeable, 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 charge rate (using the charge formula of matching resource and staffing level on the task to the initiative, and converting to the initiative currency; for daily initiatives, the charge 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.
- **Uncross charged Time:** Looks at time with the initiative id that has been entered, submitted or approved but not yet cross charged, assigns a charge 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.
- **Uncross charged Fixed Fees:** Selects all fixed fees for the initiative that have not yet been charged, and puts the charge amount into the appropriate bucket based on the fixed fee's charge date.
- **Uncross charged Non-Labor Item:** Selects all non-labor items for the initiative that have not yet been charged and puts the charge amount into the appropriate bucket based on the charge date.
- The report will be sorted by initiative name and initiative currency, with totals for each currency.

## User-Specified Criteria

- Cost Structure
- Initiative name
- Start date

- Number of weeks to display

## URL

/Reports/rpRevBookedByCo.asp

## Chargeable 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 **Chargeable Utilization by Workgroup**.

The **Chargeable 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, chargeable and non-chargeable hours within a certain time period.

## Display Details

- Start date
- End date
- Resource/Task name
- Standard hours (time entered to non-project time)
- Chargeable hours (time entered to tasks marked as chargeable)
- Non-Chargeable hours (time entered to tasks marked as non-chargeable)
- Chargeable utilization (time entered to tasks marked as chargeable 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:

- 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)

- 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)

- 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.)

- 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

## Cross Charged Hours by Resource

- 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.

- Expand the **Resource Management** category and click **Cross Charged Hours by Resource**.

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

### Intended Audience

- Managers

### Purpose

This report contains the chargeable-cross charged time by resource for a defined time period.

**Display Details**

- Resource name
- Department name
- Start date
- End date
- Print date
- Client name
- Project name
- Task name
- Staffing Level
- Regular hours
- Overtime hours
- Write-off hours
- Charged hours

**System-Defined Criteria**

- Time (approved):
  - Regular
  - Overtime
  - Written off
- Hours cross charged

**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:

- 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
- Client name
- Project status
- Planned start date

**Initiative Details:**

- Initiative name
- Client name
- Initiative status
- Effective Contract date

**Candidate details:**

- Candidate name
- Client name
- Candidate status
- Revised close date

### **System-Defined Criteria**

- Initiatives, where the resource is an Initiative Manager
- Projects, where the resource is a Project Manager
- Candidates, 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
  - Client
  - Contact
  - Number of Positions
- For Open Resource Requests
  - Client
  - Initiative Name
  - Current Status
  - Resource Request Function
  - Staffing Level
  - Start Date
  - Estimated Hours
  - Initiative Manager
  - Initiative Manager Workgroup
  - Resource Request Number
  - Resource Manager
  - Requested Resource
- For Unassigned Tasks
  - Client
  - Initiative Name
  - Project Name
  - Task Name
  - Function Name
  - Staffing Level
  - Planned Start
  - Planned Finish
  - Planned Hours
  - Project Manager

- For Unstaffed Task Assignments
  - Client
  - Initiative Name
  - Project Name
  - Task Name
  - Function Description
  - Staffing Level
  - Planned Start
  - Planned Finish
  - Planned Hours
  - Project Manager
- For Unassigned Candidates
  - Client
  - Candidate Name
  - Status
  - Candidate Staffing Level
  - Candidate Function
  - Start Date
  - End Date
  - Estimated Effort
  - Location
  - Client Manager
  - Staffing Workgroup
  - Client Workgroup

### User-Specified Criteria

- Initiative Status
- Candidate 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 199 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 Initiative 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.
- Staffing Level – displays the required staffing level 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
- Initiative 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 Initiative Time and Expense Approvals.

### Display Details

- Resources for which the user has:
  - Time Approval rights
  - Expense Approval rights
- Initiatives for which the user is either a Resource Approver or an Initiative 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 chargeable 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)
- Chargeable hours (total hours for tasks marked as chargeable)
- Utilization hours (total hours for tasks and non-project time marked as utilization eligible)
- Hours written off/up (hours written off or up on a cross charge 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).

- Chargeable % of Target ((chargeable 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
- Chargeable % 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 chargeable hours (net of written off hours that affect utilization) are divided by the "expected hours" to get the chargeable 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:

- 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

- 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.
- 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

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### About Revenue Recognition Reports

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

### Cross Charges Category

The following reports are included under Cross Charges:

- “Associate Cross-Charged Time with Fixed Fee” on page 136
- “Batch Committed Cross Charges” on page 137
- “Batch Cross Charge Errors” on page 137
- “Batch Cross Charges Created” on page 138
- “Batch Cross Charge Processes” on page 138
- “Batch Printing” on page 139
- “Cross Charge Details with Net Write-Offs” on page 139
- “Cross Charges by Cost Structure” on page 143
- “Cross Charges by Cost Structure and Month” on page 144
- “Cross Charges by Client” on page 145
- “Cross Charges by Currency” on page 146
- “Cross Charges by Date” on page 147
- “Cross Charges by Initiative Manager” on page 147
- “Cross Charges by Cross Charge Number” on page 149
- “Cross Charges by Month” on page 150
- “Cross Charges by Project Manager” on page 150
- “Cross Charges by Status” on page 151
- “Charges with Details by Client” on page 153
- “Split Charge Consolidation” on page 154
- “Unpaid Cross Charges” on page 155
- “Work Performed and Cross Charged” on page 156

### Batch Cross Charges Processes

For more information on how to submit cross charges:

- See the “Cross Charge Overview and Preparation” chapter in the *Revenue Management User Guide*

- See the “Cross Charge Creation” chapter in the *Revenue Management User Guide*
- See the “Cross Charge Processing” chapter in the *Revenue Management User Guide*

## Recognition Reports

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

## Associate Cross-Charged Time with Fixed Fee

### Intended Audience

Finance

### Purpose

To let organizations to associate cross-charged time records with specific fixed fees.

### Display Details

- Client
- Initiative
- Project
- Task
- Resource
- Date
- Regular Hours
- Overtime Hours
- Fixed Fee

### System-Defined Criteria

- Time records sorted by client and then date.

### User Specified Criteria

Cost Structure

Client

Initiative

**Fiscal Period:** Fiscal Year and Fiscal Period

or

**Date Range:** Start and End Dates

### URL

/Reports/rpAssociateTimeWithFixedFee.aspx



## Batch Committed Cross Charges

### Intended Audience

Finance

### Purpose

This report shows a listing of cross charges that were committed by the batch cross charging process.

### Display Details

- Client
- Initiative
- Draft Cross Charge Number
- Committed Cross Charge Number
- Committed on
- Committed by

### System-Defined Criteria

- Selects all cross charges committed by the batch cross charging process, sorts by cross charge status, then by client, then by initiative, then by cross charge date.

### User Specified Criteria

- Start date
- End date

## Batch Cross Charge Errors

### Intended Audience

- Finance

### Purpose

This report shows any cross charges that could not be created by the batch cross charge process.

### Display Details

- Cost Structure
- Client
- Initiative
- Initiative manager

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

### **System-Defined Criteria**

- Selects all items chosen for batch cross charging for which cross charge creation was unsuccessful.

### **User-Specified Criteria**

- None

### **URL**

/Core/Report/rpNonExistingInvoices.asp

## **Batch Cross Charge Processes**

For more information, see the “About the Batch Cross-Charge Processes” section in the “Cross Charge Creation” chapter in the *Revenue Management User Guide*.

## **Batch Cross Charges Created**

### **Intended Audience**

- Finance

### **Purpose**

This report shows a listing of cross charges that were created by the batch cross charging process.

### **Display Details**

- Cross Charge status
- Client
- Cross Charge date
- Cross Charge number
- Paid status
- Cross Charge total
- Currency
- Cross Charge description

### **System-Defined Criteria**

- Selects all cross charges created by the batch cross charging process, sorts by cross charge status, then by client, then by initiative, then by cross charge date.

**User-Specified Criteria**

- Currency

**URL**

/Core/Report/vwInvByBatch.asp

**Batch Printing**

For more information, see the “Printing Bulk Cross Charges Locally” section in the “Cross Charge Creation” chapter and the “Printing Cross Charges in Scheduled Batches” section in the “Cross Charge Creation” chapter in the *Revenue Management User Guide*.

**Cross Charge Details with Net Write-Offs****Intended Audience**

- Finance, Clients (if more detail is required)

**Purpose**

This report contains a breakdown by date of hours and expenses for a cross charge. Balances to the Cross Charge General format. Only project time and expenses are broken down; all other items, such as fixed fees, non-labor item, additional items and tax amounts, are not shown on this report.

**Display Details****Cross Charge Information:**

- Cross Charge number
- Client name
- Cross Charge status
- Cross Charge date
- Initiative
- Cross Charge 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 Cross Charge, 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 initiatives). 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 initiatives). 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
- Charge per unit
- Expense amount, which are net of recoverable taxes, i.e., the cross charged amount of the expense.
- Net of recoverable taxes
- Percent of charge for split charges
- 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.

#### **Non-Labor Items section:**

The non-labor item records are sorted by date.

- Non-Labor Item charge date

- Non-Labor Item name
- Non-Labor Item description (from the initiative)
- Quantity
- Charge per unit
- Amount Written-Off/Up
- Write off reason code
- Write off description
- Ship to location
- Tax schedule
- Tax amount
- Total cross charged amount (quantity times charge per unit plus amount written-off/up)

Totals for tax amount and cross charged amount for all non-labor items.

#### **Fixed Fee section:**

The fixed fee records are sorted by date.

- Fixed fee charge date
- Description of the fixed fee deliverable
- Prepaid (check box from the fixed fee deliverable)
- Work location
- Work code
- Tax schedule
- Tax amount
- Total charge amount

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

#### **Additional Items section:**

Additional items are sorted by description.

- Description
- Tax Schedule
- Tax amount
- Amount

Totals for cross charged amount and tax amount for all additional items.

#### **Adjustments section:**

- Total time adjustment (from the **Total adjustment** field on the **Time** tab of the Cross Charge dialog box)
- Total expense adjustment (from the **Total adjustment** field on the **Expenses** tab of the Cross Charge dialog box)
- Total adjustment for additional items (from the **Total adjustment** field on the **Additional Items** tab of the Cross Charge dialog box)

- Total Tax Adjustments (from the Cross Charge dialog box)

### **System-Defined Criteria**

- Time, support time, expenses, fixed fees, non-labor items, additional items and adjustments per the cross charge general format, detailing those sections
- Write-offs are shown as a column.

### **User-Specified Criteria**

- Client name
- Cross Charge number

### **URL**

/Reports/rpInvoiceDetailWO.asp

## **Cross Charges by Cost Structure**

### **Intended Audience**

- Finance

### **Purpose**

This report contains a listing of cross charges by cost structure.

### **Display Details**

- Cost Structure
- Date
- Cross Charge number
- Status
- Total
- Paid
- Description
- Total for cost structure

### **System-Defined Criteria**

- Grouped by cost structure
- Sorted within by cross charge number

### **User-Specified Criteria**

- Currency
- Committed totals for Cost Structure

**URL**

/core/report/vwInvByBillingOffice.asp

**Cross Charges by Cost Structure and Month****Intended Audience**

- Finance

**Purpose**

This report contains a listing of cross charges grouped by cost structure and month.

**Display Details****Report Header**

- Summary of selections: cost structures selected, cross charge status selected, currency selected
- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

**Report Data**

- Cost Structure. Click the plus icon to expand the list.
- Month. Click the plus icon to expand the list.
  - Date
  - Cross Charge number
  - Status
  - Total
  - Currency
  - Paid
  - Description
- Total committed for the month
- Total cross charged for the month
- Total committed for the cost structure
- Total cross charged for the cost structure

**System-Defined Criteria**

- Grouped by cost structure
- Grouped by month
- Sorted within the month by cross charge number
- Amounts converted to the selected currency



**User-Specified Criteria**

- Cost Structure
- Cross Charge status
- Currency
- Select **Date Range** or **Fiscal Period**

**Date Range:**

- Start date
- End date

**Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

**URL**

/core/report/vwInvByBillingOfficeMonth.asp

**Cross Charges by Client****Intended Audience**

- Finance

**Purpose**

This report contains a listing of cross charges grouped by client.

**Display Details**

- Client name. Click the plus icon to expand the list.
- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Paid
- Description
- Total for client

**System-Defined Criteria**

- Grouped by client
- Sorted by Cross Charge Date
- Amounts converted to the selected currency

### **User-Specified Criteria**

- Currency

### **URL**

/core/report/vwInvByClient.asp

## **Cross Charges by Currency**

### **Intended Audience**

- Finance

### **Purpose**

This report contains a listing of cross charges grouped by currency.

### **Display Details**

- Currency. Click the plus icon to expand the list.
- Client name. Click the plus icon to expand the list.
- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Currency
- Paid
- Description
- Total committed to the client
- Total cross charged to the client

### **System-Defined Criteria**

- Grouped by Currency
- Grouped by Client name
- Sorted in descending order by cross charge date

### **User-Specified Criteria**

- Currency

### **URL**

/core/report/vwInvByInvoiceCurrency.asp

## Cross Charges by Date

### Intended Audience

- Finance

### Purpose

This report contains a listing of cross charges sorted by date.

### Display Details

- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Currency
- Paid
- Description
- Committed Total
- Total cross charged amount

### System-Defined Criteria

- Sorted by date

### User-Specified Criteria

- Currency

### URL

/core/report/vwInvByDate.asp

## Cross Charges by Initiative Manager

### Intended Audience

- Finance, Initiative Managers

### Purpose

This report contains a listing of cross charges grouped by Initiative Manager.

### Display Details

### Report Header

- Summary of selections: Initiative Managers selected, cross charge status selected, currency selected
- Reporting period:
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods
  - Start date, end date

### **Report Data**

- Initiative Manager. Click the plus icon to expand the list.
- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Paid
- Description
- Committed total for Initiative Manager
- Total for Initiative Manager

### **System-Defined Criteria**

- Grouped by Initiative Manager
- Amounts converted to the chosen currency

### **User-Specified Criteria**

- Initiative Manager
- Cross Charge status
- Currency
- Select **Date Range** or **Fiscal Period**

#### **Date Range:**

- Start date
- End date

#### **Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

### **URL**

/core/report/vwInvByEngagementManager.asp

## Cross Charges by Cross Charge Number

### Intended Audience

- Finance

### Purpose

This report contains a listing of cross charges sorted by cross charge number.

### Display Details

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

### System-Defined Criteria

- Sorted by cross charge number
- Amounts converted to the currency chosen

### User-Specified Criteria

- Client
- Initiative
- Cross Charge number
- Start date
- End Date
- Currency

---

**Tip:** You can select client then initiative and you will be presented with a list of cross charge numbers to select. Otherwise, you can type all or part of a cross charge number and the report will list cross charges that match the numbered entered.

---

### URL

/core/report/vwInvByInvoiceNum.asp

## Cross Charges by Month

### Intended Audience

- Finance

### Purpose

This report contains a listing of cross charges grouped by month.

### Display Details

- Month. Click the plus icon to expand the list.
- Client name. Click the plus icon to expand the list.
- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Currency
- Paid
- Description
- Totals for client by month

### System-Defined Criteria

- Grouped by month
- Sorted within the month by client

### User-Specified Criteria

- Currency

### URL

/core/report/vwInvByMonth.asp

## Cross Charges by Project Manager

### Intended Audience

- Finance, Initiative Managers, Project Managers

### Purpose

This report contains a listing of cross charges grouped by Project Manager.

**Display Details**

- Project Manager. Click the plus icon to expand the list.
- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Currency
- Paid
- Description
- Total committed for Project Manager
- Totals for Project Manager

---

**Note:** If a cross charge contains multiple records from different projects, it will be shown under both Project Managers.

---

**System-Defined Criteria**

- Grouped by Project Manager
- Sorted by cross charge number

**User-Specified Criteria**

- Currency

**URL**

/core/report/vwInvByProjectManager.asp

**Cross Charges by Status****Intended Audience**

- Finance, Initiative Managers, Project Managers

**Purpose**

This report contains a listing of cross charges sorted by cross charge status for the selected date range, cost structures, cross charge status and currency.

**Display Details****Report heading:**

- Summary of selections: cost structures included in the report, cross charge status included in the report, currency selected

- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date
- Cost Structures included in the report

**Report data:**

Cross Charge list sorted by status, then by client:

- Cross Charge status. Click the plus icon to expand the list.
- Client name. Click the plus icon to expand the list.
- Cross Charge date
- Cross Charge number
- Cross Charge status
- Cross Charge total
- Currency
- Paid
- Description
- Total committed for the client
- Total cross charged to the client
- Total committed for cross charges in that status
- Total of cross charges in that status

**System-Defined Criteria**

- Grouped by cross charge status
- Grouped by client
- Cross Charges sorted by cross charge number
- Converted to the currency selected

**User-Specified Criteria**

- Cost Structure
- Cross Charge status
- Currency
- Select **Date Range** or **Fiscal Period**

**Date Range:**

- Start date
- End date



**Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

**URL**

/core/report/vwInvByStatus.asp

**Charges with Details by Client****Intended Audience**

- Finance

**Purpose**

This report contains a listing of cross charges grouped by client, and listed by totals charged for each category.

**Display Details****Report Header**

- Summary of selections: clients selected, cross charge status selected, currency selected
- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

**Report Data**

- Client name. Click the plus icon to expand the list.
- Cross Charge number
- Cross Charge status
- Currency (as selected by the user)
- Total time charged
- Total expenses charged
- Total other charged
- Cross Charge total
- Total committed for the client
- Total cross charged to the client

**System-Defined Criteria**

- Grouped by client
- Sorted by cross charge number

- Amount converted to the selected currency

### User-Specified Criteria

- Client name. Use the type-ahead field to filter the client listing, then select from the list. Select **All**, or use the CTRL or SHIFT key to select multiple clients.
- Cross Charge status
- Currency
- Select **Date Range** or **Fiscal Period**

#### Date Range:

- Start date
- End date

#### Fiscal Period:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

### URL

/core/report/vwInvbyComponent.asp

## Split Charge Consolidation

### Intended Audience

- Initiative Managers, Project Managers, Finance, Sales Personnel

### Purpose

This report provides consolidated cross charging information for the selected split charged initiatives.

### Display Details

#### Heading for each initiative:

- Initiative name
- Approved amount, start date and end date
- Charge currency
- Charge type

#### For each initiative:

- Client name and percentage included in the split:
- For each client— Display all cross charges for the client using this initiative: Cross Charge Number, Cross Charge Date, Cross Charge Amount, Cross Charge Status  
Subtotal —Total cross charge amount for the client

- Total —Total cross charge amount for all clients in the split charges initiative.

### **System-Defined Criteria**

- Sorted by initiative and “charge to” client.

### **User-Specified Criteria**

- Cost Structure
- Client
- Initiative

### **URL**

/Finance/SplitBillingReport/rpSplitBillingConsolidate.asp

## **Unpaid Cross Charges**

### **Intended Audience**

- Finance, Initiative Managers

### **Purpose**

This report contains a listing of unpaid cross charges with aging.

### **Display Details**

- Cost Structure. Click the small right-pointing arrow to expand the list.
- Client name. Click the small right-pointing arrow to expand the list.
- Cross Charge number
- Last Status date
- Cross Charge amount
- Currency
- Amount in Cross Charge currency
- Amount in Selected currency
- Status check mark:
  - Current
  - Greater than 30 days
  - Greater than 60 days
  - Greater than 90 days
- Total committed for client
- Total committed for cost structure

**System-Defined Criteria**

- Grouped by:
  - Cost Structure
  - Client
- Cross Charges with status Committed, Sent, or Partial Paid, sorted by cross charge number
- Totals for:
  - Committed cross charges for the client
  - Committed cross charges for the cost structure

**User-Specified Criteria**

- Currency

**URL**

/core/report/vwInvByUnpaidInv.asp

**Work Performed and Cross Charged****Intended Audience**

- Finance, Initiative Managers

**Purpose**

This report contains a listing of cross charges for work charged to a client and/or for work performed for the client.

**Display Details****Work charged to: Client name**

- Cost Structure
- Client the work was performed for (if different than charge to)
- Initiative
- Cross Charge number
- Currency
- Cross Charge 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)
- Non-Labor Item 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: Client name**

- Cost Structure
- Client the work was charged to
- Initiative
- Cross Charge number
- Currency
- Cross Charge 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)
- Non-Labor Item 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: Client name**

- Grand totals for each section.

#### **System-Defined Criteria**

For the selected date range, client, cost structures and initiatives:

- Displays cross charges that have the selected client as the Charge To (work charged to this client)
- Displays cross charges that have the selected client as Work Performed For (work charged to another client)

#### **User-Specified Criteria**

- Client name
- Cost Structure
- Initiative

---

**Note:** If charges are used, the split charge percentage displays beside the main and phantom initiatives in the drop-down list.

---

- Period Start
- Period End

- Cross Charge amount
- Currency

**URL**

/core/report/rpTotalWorkPerformed.asp

## CHAPTER 14

# Time and Expense Reports

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### 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 159
  - “Expense Reports by Resource” on page 161
  - “Expense Reports by Status” on page 162
  - “Expense Write-Offs/Ups” on page 164
  - “Shared Resources Details” on page 165
  - “Shared Resources Details with Costs” on page 167
  - “Shared Resources Summary” on page 169
  - “Shared Resources Summary with Costs” on page 170
  - “Time and Expenses by Client” on page 171
  - “Time and Expenses by Cost Structure” on page 172
  - “Time and Expenses by Cross Charge Number” on page 174
  - “Time and Expenses by Resource” on page 176
  - “Time Listing” on page 177
  - “Time Listing with Costs” on page 179
  - “Time Listing with Costs and Cross Charge Information” on page 181
  - “Time Submission Conformance” on page 183
  - “Time Write-Offs/Ups” on page 185
  - “Unapproved Time and Expenses” on page 187
  - “Unapproved Time by Approver” on page 188
  - “Uncharged Time and Expenses” on page 190

### 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
- Client name
- Initiative
- Project
- Task
- Date
- Regular Hours
- Overtime Hours
- Description
- Level (approval type, i.e., initiative, line, second-level)
- Check box beside each row (time entry).

#### Expense Reports

- Expense report number
- Resource name (resource that submitted the expense report)
- Client name
- Initiative
- Date submitted
- Expense report amount
- Expense report currency
- Level (approval type, i.e., initiative, 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

- Initiative/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
- Initiative
- Client 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:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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, Initiative 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):
  - Cost Structure 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
- Initiative
- Client 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:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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

- Initiative Managers, Finance, Project Managers

### Purpose



This report lists expenses, by client, that have been written off by the cross charger.

### Display Details

#### Report Header

- Summary of selections: clients selected, initiatives selected, projects selected, currency selected
- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

#### Report Data

- Client name. Click the plus icon to expand the list.
- Project name. Click the plus icon to expand the list.
- Non-Chargeable 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 client

### System-Defined Criteria

- All expenses written off, according to the selected criteria, for all cross charge statuses.

## User-Specified Criteria

- Client name
- Initiative name
- Project name
- Currency
- Select **Date Range** or **Fiscal Period**

### Date Range:

- Start date
- End date

### Fiscal Period:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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

Initiative Managers

## Purpose

Shows charge amounts for time records where the resource's workgroup is different than the Initiative Manager's workgroup.

## Display Details

### Report Data

- Cost Structure
- Client
- Initiative
- Project

- Task
- Initiative Manager Workgroup
- Global Workgroup
- Workgroup
- Resource
- Date
- Created On
- Time Status
- Time Type
- Start Time
- End Time
- Cross Charge Status
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Chargeable
- Capital
- Utilized
- Chargeable Regular Hours
- Chargeable OT Hours
- Regular Hours
- OT Hours
- Regular Charge Rate
- Regular Charge Currency
- OT Charge Rate
- OT Charge Currency
- Equivalent Hourly Charge Rate
- Equivalent Hourly Charge Currency
- Extended Charge Amount
- Description
- Actual Status

#### **System-Defined Criteria**

- Date

### User-Specified Criteria

- Chargeable (Y/N)
- Date
- Initiative Management Workgroup
- Cross Charge 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

Initiative Managers

### Purpose

Shows cost and charge amounts for time records where the resource's workgroup is different than the Initiative Manager's workgroup.

### Display Details

- Cost Structure
- Client
- Initiative
- Project
- Task
- Initiative Manager Workgroup
- Global Workgroup
- Workgroup
- Resource
- Date
- Created On
- Time Status

- Time Type
- Start Time
- End Time
- Cross Charge Status
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Chargeable
- Capital
- Utilized
- Chargeable Regular Hours
- Chargeable OT Hours
- Regular Hours
- OT Hours
- Regular Cost Rate
- Regular Cost Currency
- OT Cost Rate
- OT Cost Currency
- Regular Charge Rate
- Regular Charge Currency
- OT Charge Rate
- OT Charge Currency
- Equivalent Hourly Charge Rate
- Equivalent Hourly Charge Currency
- Extended Charge Amount
- Extended Cost
- Description
- Actual Status

#### **System-Defined Criteria**

- Date

#### **User-Specified Criteria**

- Chargeable (Y/N)
- Date



- Initiative Management Workgroup
- Cross Charge 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

Initiative Managers

### Purpose

Shows charge amounts for time records where the resource's workgroup is different than the Initiative Manager's workgroup.

### Display Details

- Regular Charge Currency
- Chargeable Regular Hours
- Chargeable OT Hours
- Regular Hours
- OT Hours
- Extended Charge Amount

### System-Defined Criteria

- Date

### User-Specified Criteria

- Date
- Initiative Management Workgroup
- Cross Charge Status
- Regular Charge 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

Initiative Managers

### Purpose

Shows cost and charge amounts for time records where the resource's workgroup is different than the Initiative Manager's workgroup.

### Display Details

- Regular Charge Currency
- Chargeable Regular Hours
- Chargeable OT Hours
- Regular Hours
- OT Hours
- Extended Charge Amount
- Extended Cost

### System-Defined Criteria

- Date

### User-Specified Criteria

- Date
- Initiative Management Workgroup
- Cross Charge Status
- Regular Charge Currency
- Time Status
- Time Type
- Workgroup

## Time and Expenses by Client

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 Client**.

The **Time and Expenses by Client** report displays.

### Intended Audience

- Initiative/Project Managers, Finance

### Purpose



This report lists all approved time and expenses by client.

### Display Details


#### Report Header

- Summary of selections: clients selected, initiatives selected, projects selected, currency selected
- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date


#### Report Data

- Client name. Click the plus icon to expand the list.
- Project name. Click the plus icon to expand the list.
- Non-Chargeable icon 
- Written off icon 

#### Time:

- Date when the time was incurred
- Resource name
- Charged icon 
- Number of Hours
- Task name
- Description for time
- Total time for project

**Expenses:**

- Date when expense was incurred
- Resource name
- Charged icon 
- Amount
- Currency
- Task name
- Description
- Total expenses for project
- Total time for client
- Total expense for client

**System-Defined Criteria**

- All approved time and expenses by selected client

**User-Specified Criteria**

- Client name. Use the type-ahead field to filter the client listing, then select from the list. Select **All**, or use the CTRL or key to select multiple clients.
- Initiative. The list is populated based on the clients chosen.
- Project. The list is populated based on the initiatives chosen.
- Currency (to convert expenses)
- Select **Date Range** or **Fiscal Period**

**Date Range:**

- Start date
- End date

**Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

**URL**

/Core/Report/vwInvTimeAndExpenseByClient.asp

**Time and Expenses by Cost Structure**

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.

- Expand the **Time and Expense Reports** category and click **Time and Expenses by Cost Structure**.

The **Time and Expenses by Cost Structure** report displays in the Details view.

### Intended Audience

- Finance Managers

### Purpose



This report lists all time and expenses by cost structure.

### Display Details


#### Report Header

- Summary of selections: cost structures selected, currency selected
- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected.
  - Start date, end date


#### Report Data

- Cost Structure. Click the plus icon to expand the list.
- Client name. Click the plus icon to expand the list.
- Non-Chargeable icon 
- Written off icon 

#### Time:

- Date when the time was incurred
- Resource name
- Charged icon 
- Number of Hours
- Task name
- Description for time
- Total time for client

#### Expenses:

- Date when expense was incurred
- Resource name
- Charged icon 
- Amount
- Currency
- Task Name
- Description
- Total expenses for client
- Total time for cost structure

- Total expense for cost structure

### System-Defined Criteria

- All approved time and expenses for the selected cost structures

### User-Specified Criteria

- Select whether to display time only, expenses only, or both time and expenses
- Cost Structure
- Currency (to convert expense reports)
- Select **Date Range** or **Fiscal Period**

#### Date Range:

- Start date
- End date

#### Fiscal Period:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period

### URL

/core/report/vwInvTimeAndExpenseByBillingOffice.asp

## Time and Expenses by Cross Charge 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 Cross Charge Number**.  
 The **Time and Expenses by Cross Charge** report displays in the Details view.

### Intended Audience

- Initiative/Project Managers and Finance.

### Purpose

This report lists all time and expenses related to a particular cross charge.

### Display Details

#### Report Header

- Summary of selections: clients selected, cross charges selected, currency selected

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

### **Report Data**

- Cross Charge number. Click the plus icon to expand the list.
- Client 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 cross charge
- Total expenses for cross charge

### **System-Defined Criteria**

- All cross charged time and expense including write-offs for that cross charge.

### **User-Specified Criteria**

- Client name. Use the type-ahead field to filter the client listing, then select from the list. Select **All**, or use the CTRL or SHIFT key to select multiple clients.
- Cross Charge number
- Currency (to convert expenses)
- Select **Date Range** or **Fiscal Period**

### **Date Range:**

- Start date
- End date

**Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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**

- Initiative/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):
  - Cost Structure 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.
- Client name. Click the plus icon to expand the list.

**Time:**

- Date when the time was incurred
- Charged icon 
- Amount
- Task name
- Description
- Total time



**Expenses:**

- Date when expense was incurred
- Charged 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:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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**

- Initiative, Project and Finance Managers.

**Purpose**

It lists all time, regardless of status, and the fields related to a time record.

**Display Details****Report Data**

- Client
- Initiative
- Project
- Combined Name
- Task
- Global Workgroup
- Workgroup
- Resource
- Time Date
- Created On
- Time Status
- Time Type
- Request Project
- Start Time
- End Time
- Cross Charged
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Chargeable
- 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**

- Cost Structure Name
- Client Name
- Initiative 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**

- Initiative, 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**

- Client
- Initiative
- Project
- Combined Name
- Task
- Global Workgroup
- Workgroup
- Resource
- Time Date
- Created On
- Time Status
- Time Type
- Request Project
- Start Time
- End Time
- Cross Charged
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Chargeable
- 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

- Cost Structure Name
- Client Name
- Initiative 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 Cross Charge 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 Cross Charge Information**.  
 The **Time Listing with Costs and Cross Charge Information** report displays in the Details view.

### Intended Audience

- Initiative, Project and Finance Managers.

### Purpose

It lists all time, regardless of status, and the fields related to a time record including cost and charge related fields.

**Display Details****Report Data**

- Cost Structure
- Client
- Initiative
- Project
- Combined Name
- Task
- Global Workgroup
- Workgroup
- Resource
- Time Date
- Created On
- Time Status
- Time Type
- Request Project
- Start Time
- End Time
- Cross Charged
- Recognized
- Fixed Fee
- Fixed Fee Item
- Prepaid
- Chargeable
- Capital
- Utilized
- Chargeable Regular Hours
- Chargeable OT Hours
- Regular Hours
- OT Hours
- Regular Cost Rate
- Regular Cost Rate Currency
- OT Cost Rate
- OT Cost Rate Currency
- Regular Charge Rate
- Regular Charge Currency

- OT Charge Rate
- OT Charge Currency
- Extended Charge 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**

- Cost Structure Name
- Client Name
- Initiative 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
- Chargeable hours
- Required hours
- Chargeable 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

- Initiative/Project Managers

### Purpose

This report lists all the time entries that have been written off as ordered by the client.



### Display Details

#### Report Header

- Summary of selections: clients selected, initiatives selected, projects selected, currency selected

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

**Report Data**

- Client name. Click the plus icon to expand the list.
- Project name. Click the plus icon to expand the list.
- Non-Chargeable icon 
- Written off icon 

**Time:**

- Resource name
- Hours
- Utilization affected
- Description
- Reason for write-off
- Totals for the project
- Totals for the client

**System-Defined Criteria**

- All time that has been written off

**User-Specified Criteria**

- Client name. Use the type-ahead field to filter the client listing, then select from the list. Select **All**, or use the CTRL or SHIFT key to select multiple clients.
- Initiative. The list is populated based on the clients chosen.
- Project. The list is populated based on the initiatives chosen.
- Select **Date Range** or **Fiscal Period**

**Date Range:**

- Start date
- End date

**Fiscal Period:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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 client that have been submitted but not approved.

### Display Details

#### Report Header

- Summary of selections: clients selected, currency selected
- Reporting period (select one):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

#### Report Data

- Client 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 client
- Total expenses for client

### System-Defined Criteria

- All unapproved submitted time and expenses by client.

### User-Specified Criteria

- Client name. Use the type-ahead field to filter the client listing, then select from the list. Select **All**, or use the CTRL or SHIFT key to select multiple clients.
- Currency (to convert expenses)
- Select **Date Range** or **Fiscal Period**

#### Date Range:

- Start date
- End date

#### Fiscal Period:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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):
  - Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected
  - Start date, end date

#### Report Data

- Time approver
- Resource name
- Chargeable hours
- Non-Chargeable 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:

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure 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:

- 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

## Uncharged 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 **Uncharged Time and Expenses**.

The **Uncharged Time and Expenses by Client** report displays in the Details view.

## Intended Audience

- Initiative/Project Managers, Finance

## Purpose

This report is a review of all time and expenses which have not yet been included on a cross charge. This report includes all amounts which are approved and otherwise ready to be cross charged.

## Display Details

### Report Header

- Summary of selections: clients selected, initiatives selected, projects selected, currency selected
- Reporting period:
- Cost Structure for fiscal period setup, fiscal years selected, fiscal periods selected or start date, end date

### Report Data

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

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

**Time:**

- Date entered
- Resource name
- Charge rate (from time table — hourly charge rate, or daily charge rate divided by the resources hours per day, or zero if not populated; converted to the currency selected for the report)

---

**Note:** If the charge rate displays as -1, the Update Time Rates job could not find a charge rate for that record. Check the initiative charge 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 charge 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 client, total expenses for the client

**System-Defined Criteria**

- Approved, non-charged expenses
- This includes time that has been approved and is waiting to be charged

---

**Note:** If time is subsequently desubmitted, it will not be included on the report.

---

**User-Specified Criteria**

- Client name
- Initiative name

---

**Note:** If split charges are used, phantom initiatives 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:**

- Cost Structure for fiscal period setup (will be suppressed if only one cost structure has been set up with fiscal periods)
- Fiscal Year
- Fiscal Period
- Include request time

**URL**

/Core/Report/vwNInvTimeAndExpenseByClient.asp



## CHAPTER 15

# System Management Reports

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### 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 193
  - “Pending Resources” on page 194
  - “Pending Resources” on page 194
  - “System Metadata” on page 195
  - “System Reports with Descriptions” on page 196
  - “System Reports with URLs” on page 197
  - “System Terminology” on page 198
  - “Time Locking by Resource” on page 199

### 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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