Global Reporting Services

CLIENT - RPTxx - Report Name - Right Click and Edit Field

Report Specification

Template Version: 3.2 February 2018

Document Version: x.x Right Click to Edit

# Version History

*Record in the table below the version numbers issued together with details of person responsible for making the change, summary details of the changes made and the date issued.*

| **Version Number** | **Date** | **Updated By** | **Details of Changes and Updates Made** |
| --- | --- | --- | --- |
| 1.0 | dd/mm/yyyy |  |  |
| 1.1 |  |  |  |
|  |  |  |  |

# Planview Custom Report Development Process

The completion, review and approval of this report specification is one of the key steps in the process for the development of custom reports to our customers. The full end-to-end process is detailed in the Customer Success Center:

<https://success.planview.com/?title=Planview_Enterprise/Analytics_and_Reporting/Analytics_%26_Reporting_in_Planview_Enterprise/Analytics_%26_Reporting_-_Custom_Reporting>

# Instructions for Use of this Template

*This template is structured to support the Planview Global Reporting Services (GRS) custom report development process. This process is defined later in this document.*

*The template contains instructions and guidance for the completion of the different sections throughout the implementation process. These instructions and guidance are written in this blue italic font.*

*Report numbering – it is recommended that each custom report is given a unique ID number; for example, RPT01, RPT02, etc. This assists in the tracking and identification of each custom report delivered.*

# Customer Details and Key Contacts

|  |  |  |
| --- | --- | --- |
| **Customer Name** | |  |
| **Customer Key Contact:** | **Name** |  |
| **Email:** |  |
| **Phone:** |  |
| **Planview Managing Consultant/Regional Services Director Responsible:** | |  |
| **Planview Solution Architect/Functional Consultant Responsible:** | |  |
| **Planview Global Reporting Services Contact:** | |  |
| **Planview Global Reporting Services Developer:** | |  |

# Specification Approval

|  |  |  |
| --- | --- | --- |
| **Version and Date of Approval** | |  |
| **Approved By:** | **Customer** |  |
| **Planview** |  |

# Planview Version & Reporting Solution Information

|  |  |
| --- | --- |
| **SaaS Hosted on On-Premise?** |  |
| **Planview Enterprise Version:** |  |
| **Database – MS SQL or Oracle** | Note – all SaaS Hosted systems use MS SQL Database |
| **URL (if SaaS Hosted)** |  |

# Planview Database(s)

For reports developed using SSRS and executed from a Portal Dashboard/Report Tile it is possible to provide additional versions of the report that can be executed in the xxxTEST (and other databases) on the Planview Server. This requires the creation of a version of the report RDL to be created in a database specific folder for each database and for any changes to the RDL to be duplicated into each environment specific RDL. This does require additional development effort that will be factored into the report development estimate provided.

For additional information on report testing in different databases refer to this Customer Success Center topic. LINK: <https://success.planview.com/?title=Planview_Enterprise_One/Portfolio_and_Resource_Management/Analytics_and_Reporting_in_Enterprise_One/Custom_Reporting_with_Report_Builder/Analytics_%26_Reporting_-_Custom_Reporting>

|  |  |
| --- | --- |
| **Report Required in Multiple Databases?** | Yes/No |
| **Databases Required:** | Recommend xxxPROD and xxxTEST |

# Modifications to Custom Report by Customer

It is assumed that all report development, and any future changes/enhancements to the report will be done only by the Global Reporting Services (GRS) team. For report development done using MS Reporting Services embedded datasets will be utilized, this being the most efficient way that GRS can develop and deliver reports.

Customers doing their own report development are, because of SaaS infrastructure security rules, not able to develop custom Reporting Services reports using embedded datasets. Therefore, customers will not be able to make changes to GRS developed reports. If the customer wants the ability for their internal Report Developer resources to make future changes to the report then GRS must develop the custom report using Shared Datasets. This will increase the overall development costs.

|  |  |
| --- | --- |
| **Customer Wishes to Modify Report After Delivery?** | Yes/No |

Note – any issues/failure of reports previously delivered by GRS that are the result of changes made to the report by the customer will require additional billable services from GRS to address/resolve.

# Report Business Outcomes and Requirements

*This section of the specification template is used to detail the business outcomes that the report will support and to understand when, by who and how the report will be used. These are important criteria to assist in defining the report output format and the Planview reporting platform technology(s) that will be used to realize the report.*

## Report Business Outcomes

*In this section detail the business reasons for requiring the report or output. How will the report be used to make decisions or drive actions or downstream activities by the report consumer?*

* *Example; This report is a summarization of data from Planview about a potential new project that is ready for business case approval. Information contained in the report is used to determine the feasibility, costs, impact and benefits of a potential project and is used to support the project approval process.*
* <<< Enter details of business outcomes here >>>

## Report Consumers and Report Output Type

*In this section identify the consumers of the report. A consumer of the report is someone who will receive the information that the report provides. They might receive the report by logging into Planview and running the report for themselves and viewing the report real-time on the screen. Alternatively the report consumer might receive the report indirectly, through an Excel or PDF export that is emailed to them by another Planview user. Is the report consumer going to use a spreadsheet export to pass the data in the report into another system, for example to create GL postings? Is it important to the report consumer that the report is available in a printed hardcopy format? Is the report consumer a senior person/committee in the organization that will demand that the output meets specific expectations about look and feel? Must the report meet organizational standards of formatting, font, text size, colors, etc?*

*Are there any specific business process/operational requirements that require that a real time reporting data source must be used, or could a staged data source, such as the data mart or Insight Analytics cubes be used?*

| **Report Consumer** | **How the Report will be Used** | **Required Format Type** |
| --- | --- | --- |
| *List the report consumers in this column. (it might just be one consumer)* | *Detail how they will use the report.* | *On-screen?*  *Export; PDF. Excel, Word and/or PowerPoint?*  *Print to hard copy?* |
| *EXAMPLE – Project Approval Board* | *The report will be executed by the PMO Portfolio Analyst prior to each fortnightly project approval board meeting. The PMO Analyst will run the report for all projects that are ready for approval and export the report to PDF and email it to all members of the Project Approval Board as pre-read for the approval meeting.* | *On screen, PDF export (Landscape Letter page size).* |
|  |  |  |
|  |  |  |

For guidance on report printing and export options refer to this topic in the Customer Success Center. The topic applies to the RPM Analytics but the same principles apply to custom reports;

<https://success.planview.com/?title=Planview_Enterprise/Analytics_and_Reporting/RPM_Analytics_%26_Dashboards/RPM_Analytics_-_Report_Printing_and_Exporting>

# Report Design, Layout and User Parameters

*This section of the report specification template is used to understand the structure and look and feel of the report.*

## Proposed Report Layout

*Please provide a visualization of the proposed report layout and look and feel. This can be a mock up or an existing legacy system version of the report.*

<<< Enter report visualization/description here >>>

## Fonts, Colors and House Style

*If your organization mandates that reports and documents must be produced using house style fonts, colors, logos, etc, then please detail these here.*

Font and text size?

Font and table colors?

Logo?

## User Parameters

*When a user executes the report do they need to provide some user entered parameters that will be used to determine what the report displays? Commonly used parameters will include;*

* *Planview portfolio, for example a work portfolio to determine which projects are included in the report.*
* *Start/end date parameters that will limit the amount of time phased data that will be included in the report. Date based parameters can use calendar dates, fiscal period dates or time reporting period dates.*
* *Additional filtering criteria*
* *Parameters that will change the way that the report appears or outputs, for example, provide a grouped/formatted output or a flat table output*
* *It is recommended that Planview portfolios are used when the report has a primary selection based on a group of projects, products, resources, etc.*

| **Parameter** | **Details** | **Default Values Required?** |
| --- | --- | --- |
| *List each parameter* | *Detail how the parameter will be used* | *Does the parameter need to pre-populate with a default value, for example, default a fiscal period start/end range with the current fiscal year.* |
|  |  |  |
|  |  |  |

# Report Data Definitions and Business Rules

*This section of the specification is used to define the detailed business rules to be applied to the data retrieved and visualized by the report and provides a definition of how each data point in the report maps back to structures, attributes, fields and calculations in the Planview Enterprise core application.*

## Business Rules

*In this section list out all of the business rules that must be applied to the data that is retrieved into the report. For example,*

* *List all projects that are within the selected portfolio*
* *Return all financial plan data based on the primary work financial plan model and the version marked as Forecast, between the financial periods specified by the user in the Start/End Fiscal Period Parameters.*
* <<< List business rules here >>>

## Data Definitions

*In the table below define each data point in the report.*

| **Data Point** | **Data Type** | **Business Rules and Details** | **Formatting Requirements** |
| --- | --- | --- | --- |
| *Create one row for each data point in the report* | *Is the data point a Planview field, attribute, column or calculation based different attributes in Planview?* | *Detail the business rules for determining the data point.* | *How should the data point be formatted in the report? Should it be sorted, grouped, have a back ground or text coloring?* |
| *EXAMPLE – Project Name* | *Standard Planview field* |  |  |
| *EXAMPLE - Project Group* | *WBS Primary Structure* | *The name of the parent level of the project in the work primary structure (WBS)* | *Alpha numeric sort, in bold and grouped* |
| *EXAMPLE - Project RYG Status* | *Work alternate structure* | *WBS709* | *Background color based on the attribute value charting colors.* |
| *EXAMPLE – Work and activity attributes* | *Work alternate structure* | *WBSxxx – detail whether the attribute is a project (PPL) level attribute or an activity level attribute* |  |
|  |  |  |  |
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# Data for Report Testing

*In order to efficiently and effectively develop and test a report, test data is required that is of sufficient volume (number of records) and variability (different attribute values, time ranges, etc). Production of this test data is the responsibility of the customer.*

*Provide details of the portfolio(s), projects, resources, time periods that should be used for testing.*

<<< Enter details of test data here >>>

# Technical Design and Development Recommendations

*This section is to be completed by the GRS Reporting Architect. It will be used to detail technical aspects and considerations for the development and realization of the custom report.*

<<< Enter technical design and development recommendations here >>>

## Change Log

*Use the table below to document changes made following sign off of the specification.*

| **Version** | **Date** | **Person Responsible** | **Details of the Change** |
| --- | --- | --- | --- |
| *Which version of the spec does the change apply to?* | *Date of change* | *Name of person requesting the change* | *Details of the proposed change, including impact assessment.* |
|  |  |  |  |
|  |  |  |  |