



COOKIN' WITH PPM PRO



BEST



FOOD



REPORTS COOKBOOK





The purpose of this book is to provide an example set of reports and steps to configure them (recipes) within the new reporting beta. We hope this helps you get a feel for the possible and backwards engineer various report types and topics if needed.

Thank you to the inner circle members and webinar participants that provided feedback and suggestions for these recipes.

If you have any questions about any of the following or other new beta report needs not addressed here, are looking for a specific recipe that has not yet been included, or have a recipe you would like to share, please contact productmanagement-ppmpro@planview.com

Bake-off!

We'd love to see and share the recipes you create! Send your recipes to productmanagement-ppmpro@planview.com for a chance to win a kitchen gadget, meal planning subscription, or donation to a charity of your choice!!





RECIPES:

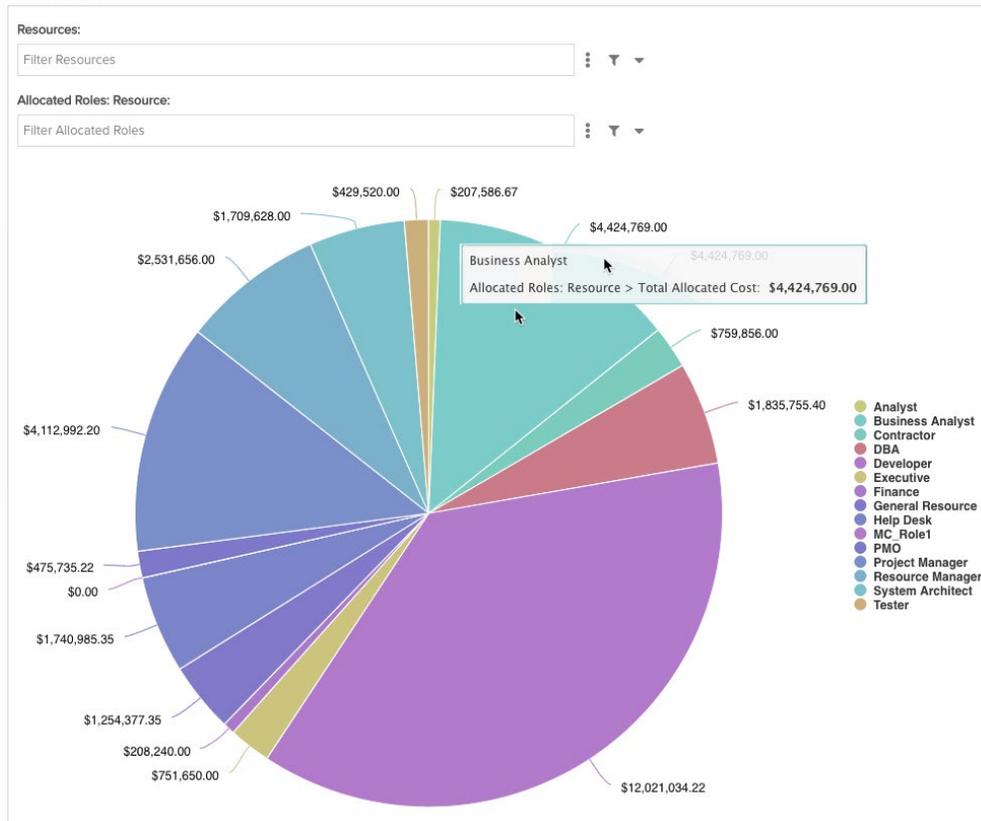
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1

ALLOCATED COST BY ROLE

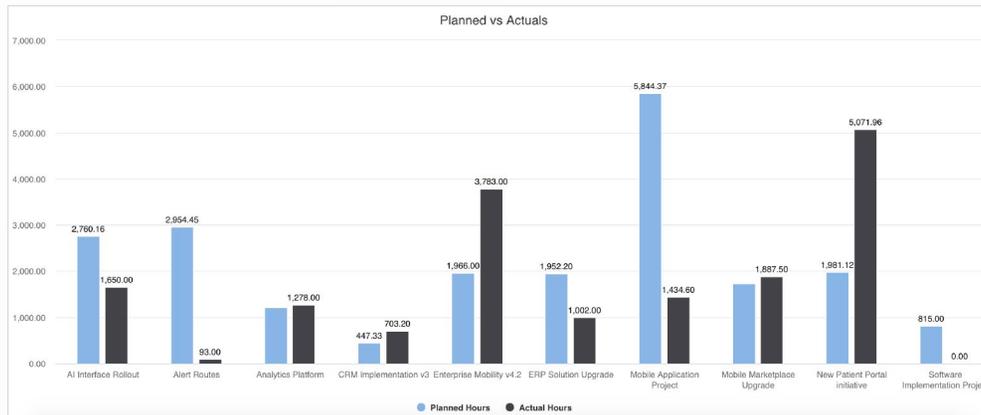
This report provides a visualization of the total allocated cost for each role, which is useful for reporting on role costs across the organization. For example, see a pie chart of the allocated costs across roles:



Design View	Selection
General	Topic: Resource Type: Pie: Basic Title: <enter a meaningful title>
Data	Group By: Resource > Allocated Roles: Resource > Role Values: Resource > Allocated Roles: Resource > Total Allocated Cost
Display	Enter and select desired Display options.
Variable Settings	Scope: Organization, Resource Filters: optionally include a resource or allocated role filter

2 PLANNED VS. ACTUALS

This report allows you to compare planned values versus actuals across a set of projects. For example, build a column chart showing Estimated and Actual Hours, for all projects in a portfolio:



Design View	Selection
General	Topic: Project Type: Column: Basic Title: <enter a meaningful title>
Data	Bottom Axis: Title Left Axis: <up to 10 comparable fields, such as Actual Hours, Estimated Hours, Scheduled Hours, Total Budget, Total Cost, Total Capitalized Costs, Total Non-Capitalized Costs, and so on>
Display	Configure Display options.
Variable Settings	Scope: Portfolio Filters: Optionally include a project filter



3

PORTFOLIO HIERARCHY BY PROJECT STATUS

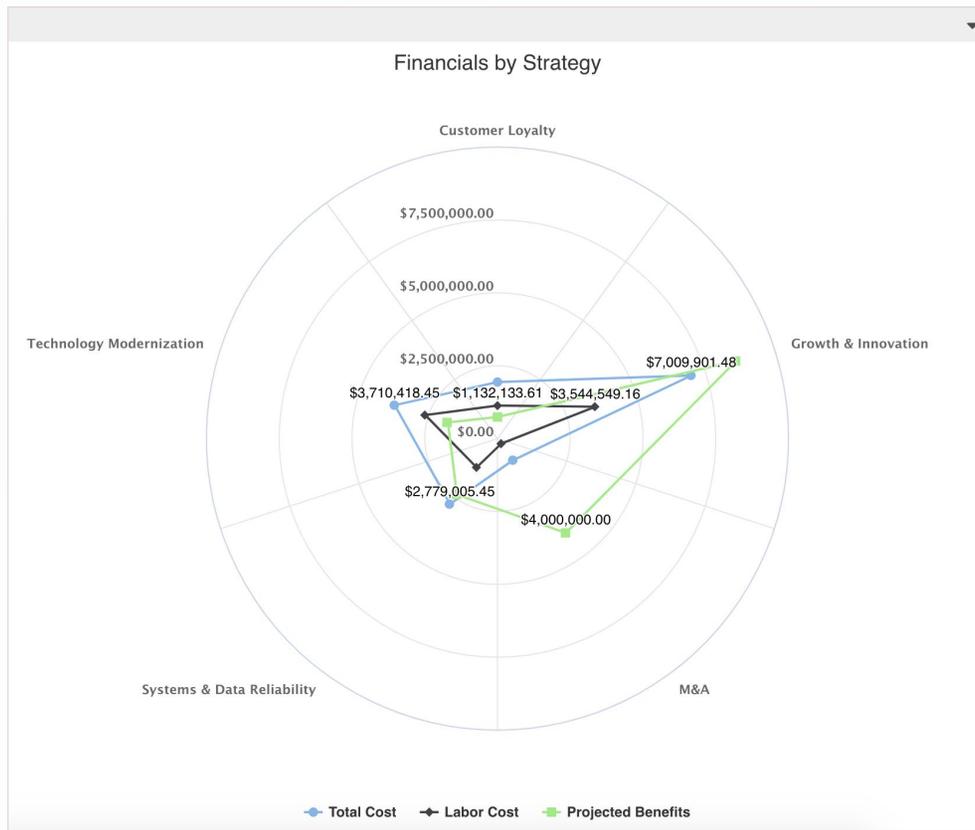
This report shows a portfolio hierarchy of projects with key status information. For example, list the projects included in each of your portfolios along with their status, % complete, overall health, and other key information:

Portfolio	Project	Owner	Type	Status	Target Date	% Complete	Budget Cost	Actual Cost	Overall RAG
Collaborative Projects									
	Apollo	Kukreja, Samir	Strategic	Approved - Backlog	07-Dec-2020	0.00%	\$0	\$0	👍
	Bigfish	Kukreja, Samir	Strategic	Active	21-Aug-2020	0.00%	\$0	\$0	👍
	NextGen Mobile Application	Kukreja, Samir	Strategic	Active	25-Mar-2021	36.00%	\$0	\$16,590	🟡
	PPM Pro Collaborative Project	Hood, Ben	Strategic	Proposed	10-Jul-2020	0.00%	\$0	\$0	🟡
	Project X	Kukreja, Samir	Strategic	Active	14-Oct-2020	20.00%	\$0	\$2,800	🟡
	X Lab	Kukreja, Samir	Strategic	Approved - Backlog	07-Aug-2020	0.00%	\$0	\$14,000	👎
Consumer Products									
	Branded Oral Care Products	Hill, Stephen	New Product	Active	08-Feb-2021	25.00%	\$475,000	\$308,713	👍
	Build out Skin Care Products	Jones, Margaret	New Product	Active	27-Nov-2020	24.65%	\$160,000	\$179,295	👍
	Expand OTC Healthcare Offerings	Hill, Stephen	New Product	Active	30-Jun-2020	11.83%	\$75,000	\$41,956	🟡
	Health Packaging made from Recyclables	Davenport, Mary	Improvements	Active	17-Sep-2020	5.83%	\$175,000	\$27,960	👎
	Launch Holiday Packaging	Chrobok, Sabrina	New Product	Proposed	18-Aug-2020	0.00%	\$450,000	\$34,700	🟡
	New OTC Products	Geld, Anthony	New Product	Active	15-Sep-2020	20.00%	\$25,000	\$46,070	👎
	Research - Canadian	McGuire, Shane	Strategic	Active	08-Jul-2020	25.00%	\$25,000	\$19,900	👍

Design View	Selection
General	<p>Topic: Portfolio Type: List</p> <p>Title: <enter a meaningful title></p>
Data	<p>List Fields: Whichever of the following and others would be of value, such as:</p> <ul style="list-style-type: none"> • Title • Projects: Linked to Portfolio > Title • Projects: Linked to Portfolio > Owner • Projects: Linked to Portfolio > Type • Projects: Linked to Portfolio > Status • Projects: Linked to Portfolio > Target Date • Projects: Linked to Portfolio > % Complete • Projects: Linked to Portfolio > Budget Cost • Projects: Linked to Portfolio > Actual Cost • Projects: Linked to Portfolio > Overall RAG
Display and Preview List Columns	<p>Configure desired options within the Display tab, such as Grouping, Sorting, or Aggregation.</p> <p>Within the Preview pane, select each column's options menu to set specific display options. Learn more about these options on the report CSC page.</p>
Variable Settings	<p>Scope: Portfolio</p> <p>Filters: Optionally include portfolio or project filters</p>

4 PORTFOLIO FINANCIALS BY BUSINESS OBJECTIVE

This report gives you a visual picture of various financial costs and revenue values given a specific project property, for all projects in a portfolio. For example, see a spiderweb showing financials of Total Cost, Labor Cost, and Projected Benefits, summarized by a project property such as Business Objective, for all projects in a portfolio:

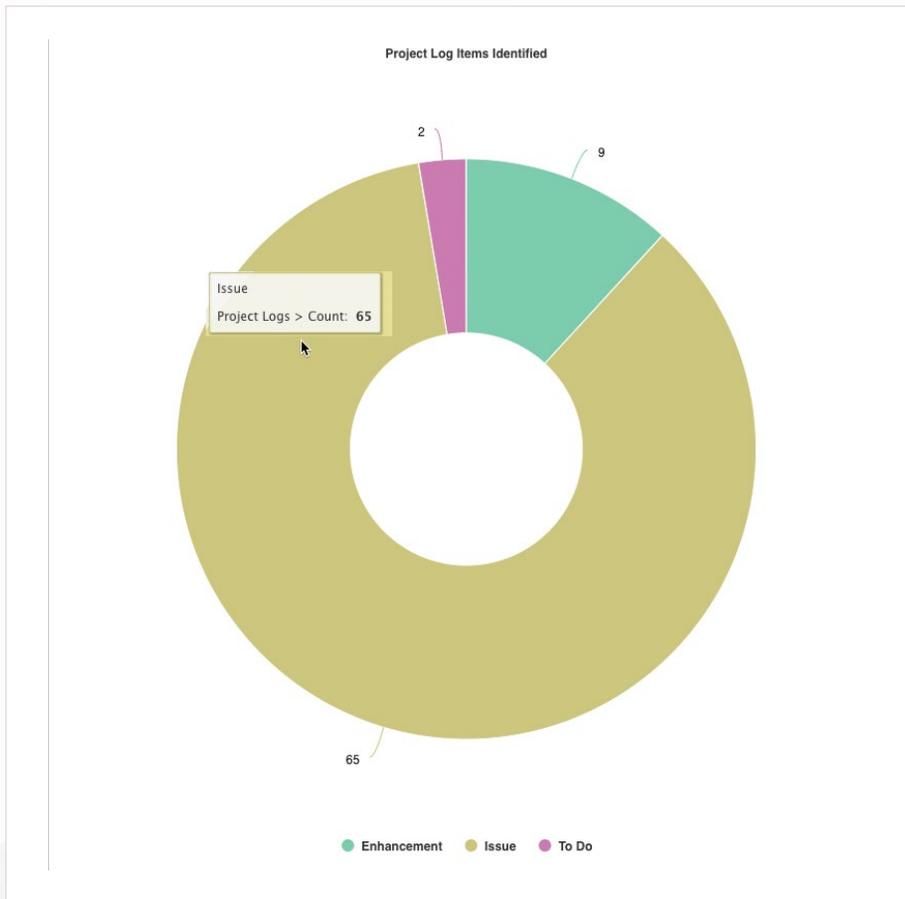


Design View	Selection
General	Topic: Project Type: Spiderweb Title: <enter a meaningful title>
Data	Group By: <1 discrete project field, such as a lookup list for Business Objective, Priority, Status, and so on> Values: <up to 10 financial fields, such as Total Cost, Projected Benefits, Total Capitalized Costs, Total Non-Capitalized Costs, and so on>
Display	Set desired Display options.
Variable Settings	Scope: Portfolio



5 PROJECTS LOGS

This report shows how many different project logs or issues exist for a project or set of projects. For example, see a donut chart showing the total number of project logs per project category:



Design View	Selection
General	Topic: Project Type: Donut Title: <enter a meaningful title>
Data	Group By: Project > Project Log > Category Values: Project > Project Log > Count
Display	Set desired Display options.
Variable Settings	Scope: Project Filters: Optionally include a project or project log filter

6

PROJECTS BY TYPE AND BUSINESS OBJECTIVE

This report uses a heatmap to show the distribution of projects given two attributes, such as Type and Business Objective:



Design View	Selection
General	Topic: Project Type: Heatmap Title: <enter a meaningful title>
Data	Bottom Axis: Type (or other field of interest) Left Axis: Business Objective (or other field of interest) Values: Count (or other field of interest, such as Total Actual and so on)
Display	Configure desired Display options.
Variable Settings	Scope: Project Filters: Optionally include a project filter



7

RESOURCE ROLES AND ALLOCATIONS

This report shows all of your resource roles and other details, as well as project allocations. For example, see a list showing each resource, their primary role, secondary roles, allocated projects, allocated roles on those projects, and other key information:

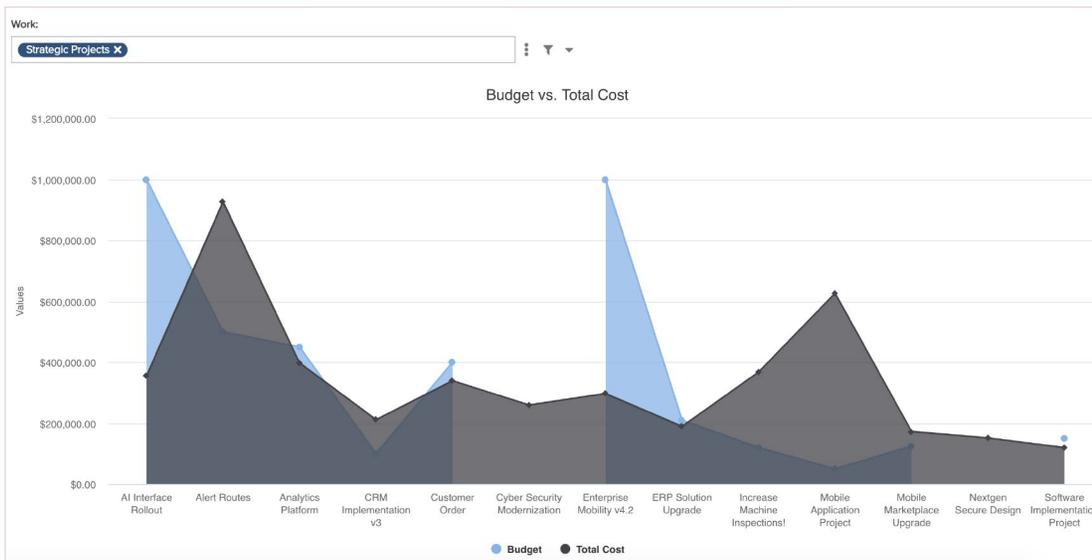
Person	Primary Role	Secondary Roles	Allocated to Project	Project Role
Geld, Anthony	Team	Business Analyst, Project Manager	Agile - Hybrid Development Project	Team
			API 5.5 Rollout	Team
			Mobile Marketplace Upgrade	Developer
			Inventory Management	Team
			Research - Canadian Oral Care Products	Team
			Capital Investment Project	Developer
			Agile - Augment Financials	Team
			AI Interface Rollout	Team
			Agile Methodology Learning Plan	Team
			Software Implementation	Developer
Gilling, Tony	Support Technician		Research - Canadian Oral Care Products	Team
			#PM Methodology	Team
Glanville, Greg	Design Engineer		Mobile Application Project	Support Technician
			Analytics Platform	Engineer
			Agile - Hybrid Development Project	Design Engineer
			Agile - Standard Jira Integration Project	Design Engineer
			Inventory Management	Design Engineer

Design View	Selection
General	<p>Topic: Resource Type: List</p> <p>Title: <enter a meaningful title></p>
Data	<p>List Fields: Whichever of the following and others would be of value, such as:</p> <ul style="list-style-type: none"> • Name: Last, First • Primary Role • Secondary Roles • Allocated Roles: Resource > Project • Allocated Roles: Resource > Role
Display and Preview List Columns	<p>Select desired options within the Display tab, such as Grouping, Sorting, or Aggregation.</p> <p>Within the Preview pane, select each column's options menu to set specific display options. For example, to change a column's title, select "Change Display Name" or double-click on the column to open the title editor.</p>
Variable Settings	<p>Scope: Organization, Resource</p> <p>Filters: Optionally include resource or allocated role filters</p>

8

SIMPLE PROJECT FINANCIALS COMPARISON

This report compares simple financial measures across a set of projects. For example, see an area chart showing Budget and Total Cost, for all projects in a portfolio:

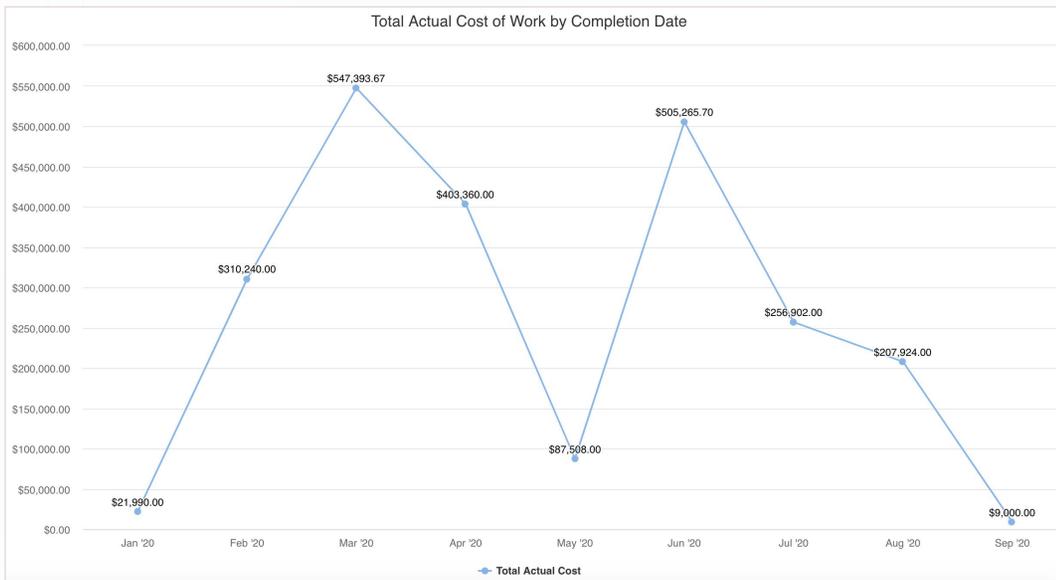


Design View	Selection
General	Topic: Project Type: Area: Basic Title: <enter a meaningful title>
Data	Bottom Axis: Title Left Axis: <up to 10 financial fields, such as Budget, Total Cost, Projected Benefits, Total Capitalized Costs, Total Non-Capitalized Costs, and so on>
Display	Set desired Display options.
Variable Settings	Scope: Portfolio Filters: Optionally include a project filter



9 SIMPLE PROJECT TIME SERIES

This report shows financial or other field values over a date range for a set of projects. For example, see a line chart showing Total Actual Cost by Completion Date, for all projects in a portfolio:



Design View	Selection
General	<p>Topic: Project Type: Line</p> <p>Title: <enter a meaningful title></p>
Data	<p>Bottom Axis: Completion Date or other meaningful project date field</p> <p>Left Axis: <up to 10 fields that do not have contoured data, such as Total Actual Cost, Total Actual Hours, Total Estimated Hours, Total Planned Hours, Total Scheduled Hours, Total Budget, Total Cost, Total Capitalized Costs, Total Non-Capitalized Costs, and so on></p>
Display	Set desired Display options.
Variable Settings	<p>Scope: Portfolio</p> <p>Filters: Optionally include a project filter</p> <p>Time Series: Select a Frequency, such as Monthly, and a Date Range (or enter a project date filter) as needed</p>

10 TOTAL FORECAST AND ACTUALS

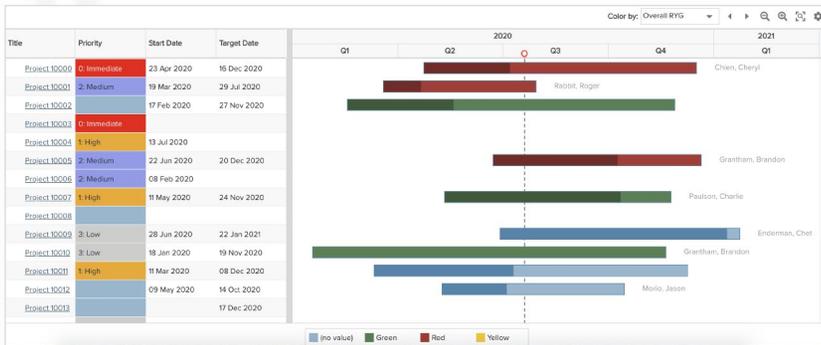
This report shows your project total forecasts and actuals. For example, see a crosstab showing total costs from Financial Entries Forecasts and Actuals along with Staffing Forecasts and Timesheet Actuals, broken out by project priority and summarized by project category:

Category	Title	1 High				2 Medium				3 Low				Grand total			
		Labor Forecast	Labor Actuals	Entries Forec...	Entries Actuals	Labor Forecast	Labor Actuals	Entries Forec...	Entries Actuals	Labor Forecast	Labor Actuals	Entries Forec...	Entries Actuals	Labor Forecast	Labor Actuals	Entries Forec...	Entries Actuals
Application Work		\$342,400.00	\$2,000.00	(\$10,000.00)	(\$1,000.00)												
	Develop Test...	\$342,400.00	\$2,000.00	(\$10,000.00)	(\$1,000.00)												
Finance		\$728,880.00	\$1,995.00	\$0.00	\$0.00	\$1,098,866.00	\$95,945.00	\$0.00	\$0.00	\$1,144,973.06	\$13,950.00	\$0.00	\$0.00	\$2,972,719.06	\$161,990.00	\$0.00	\$0.00
	20H Spring R...					\$273,590.00	\$0.00	\$0.00	\$0.00					\$273,590.00	\$0.00	\$0.00	\$0.00
	Data Center C...	\$325,000.00	\$50,695.00	\$0.00	\$0.00									\$325,000.00	\$50,695.00	\$0.00	\$0.00
	Data Manage...									\$408,960.00	\$0.00	\$0.00	\$0.00	\$408,960.00	\$0.00	\$0.00	\$0.00
	DCC	\$680.00	\$0.00	\$0.00	\$0.00									\$680.00	\$0.00	\$0.00	\$0.00
	Develop Perf...									\$580,333.06	\$11,430.00	\$0.00	\$0.00	\$580,333.06	\$11,430.00	\$0.00	\$0.00
	E-Mail Conso...					\$11,500.00	\$1,250.00	\$0.00	\$0.00					\$11,500.00	\$1,250.00	\$0.00	\$0.00
	Enhanced Fin...					\$418,840.00	\$0.00	\$0.00	\$0.00					\$418,840.00	\$0.00	\$0.00	\$0.00
	ERP Upgrade	\$403,200.00	\$900.00	\$0.00	\$0.00									\$403,200.00	\$900.00	\$0.00	\$0.00
	ERP Upgrade ...									\$30,720.00	\$2,200.00	\$0.00	\$0.00	\$30,720.00	\$2,200.00	\$0.00	\$0.00
	ESL Release L...									\$124,960.00	\$0.00	\$0.00	\$0.00	\$124,960.00	\$0.00	\$0.00	\$0.00
	Help Desk Rel...					\$401,936.00	\$4,695.00	\$0.00	\$0.00					\$401,936.00	\$4,695.00	\$0.00	\$0.00
Project		\$13,315,894.32	\$5,909,077.44	(\$2,415,250.00)	(\$2,453,993.00)	\$18,701,962.34	\$438,743.46	(\$27,267.00)	(\$15,655.00)	\$13,633,760.00	\$0.00	\$0.00	\$0.00	\$33,381,616.66	\$5,947,920.90	(\$2,482,517.00)	(\$2,469,648.00)
	20H Summer...					\$216,816.00	\$1,710.00	\$0.00	\$0.00					\$216,816.00	\$1,710.00	\$0.00	\$0.00
	2015 Applicat...	\$123,018.82	\$0.00	\$0.00	\$0.00									\$123,018.82	\$0.00	\$0.00	\$0.00
	3-D Printer In...					\$10,719,114.70	\$57,680.00	\$0.00	\$0.00					\$10,719,114.70	\$57,680.00	\$0.00	\$0.00
	Autobill					\$179,360.00	\$0.00	\$0.00	\$0.00					\$179,360.00	\$0.00	\$0.00	\$0.00
	Business Gra...					\$0.00	\$0.00	\$0.00	\$0.00					\$0.00	\$0.00	\$0.00	\$0.00
	Business Hst...	\$0.00	\$0.00	\$0.00	\$0.00									\$0.00	\$0.00	\$0.00	\$0.00
	CapexOpex	\$7,900.00	\$3,840.00	\$0.00	\$0.00									\$7,900.00	\$3,840.00	\$0.00	\$0.00
	Change Mgmt...	\$414,900.00	\$0.00	\$0.00	\$0.00									\$414,900.00	\$0.00	\$0.00	\$0.00
	Change Mgmt...					\$165,360.00	\$0.00	\$0.00	\$0.00					\$165,360.00	\$0.00	\$0.00	\$0.00
	CloudSeed L...					\$309,648.04	\$27,225.00	\$0.00	\$0.00					\$309,648.04	\$27,225.00	\$0.00	\$0.00
	CMDB									\$194,320.00	\$0.00	\$0.00	\$0.00	\$194,320.00	\$0.00	\$0.00	\$0.00
	Corporate Net...					\$50,400.00	\$2,400.00	\$0.00	\$0.00					\$50,400.00	\$2,400.00	\$0.00	\$0.00
	Customer Ap...					\$444,720.00	\$0.00	\$0.00	\$0.00					\$444,720.00	\$0.00	\$0.00	\$0.00

Design View	Selection
General	<p>Topic: Project Type: Crosstab</p> <p>Title: <enter a meaningful title></p>
Data	<p>Top Axis: Whichever fields (up to 10) would be of value for breaking up the cost data, such as by Priority, Business Objective, and so on.</p> <p>Left Axis: Whichever fields (up to 10) would be of value for organizing projects, such as by Category, Type, Title, and so on.</p> <p>Values: Whichever fields (up to 10) would be of value for representing costs (and/or revenue) and how you would like them broken out, such as Total Forecast Entries, Total Actuals Entries, Demand Cost (Staffing), Total Labor Actuals (a calculated field [Project].[Total Actual Cost]-[Project].[Total Actuals Entries]), and so on.</p>
Display	Select desired options within the Display tab, such as row and column subtotals and grand totals.
Variable Settings	<p>Scope: Organization, Portfolio</p> <p>Filters: Optionally include project filters</p>

11 PORTFOLIO ROADMAP

View the roadmap of a portfolio's projects by start and target date, including key project details. For example, show columns for project Title (with drilldown to the project entity), Priority, Start Date, and Target Date, with a Gantt showing each project's progress using the project's % Complete and also showing the project Business Sponsor:



Design View	Selection
General	Topic: Project Type: Gantt Title: <enter a meaningful title>
Data	<p>Gantt Bars: Set Bar #1 Start Date to the project Start Date field, and, Bar #1 End Date to the project Target Date field (or whatever fields you want to represent the beginning and end of the Gantt bar)</p> <p>List Fields: Whichever of the following and others would be of value, such as:</p> <ul style="list-style-type: none"> • Title • Priority • % Complete • Owner • Status • Budget Cost • Business Sponsor • Start Date • Actual Cost • Type • Target Date • Overall RAG
Display and Preview List Columns	<p>Configure desired options within the Display tab, such as Grouping, Sorting, Aggregation or Drilldown. For example, set the Title Drill Down option to Entity in order to allow your report viewers to click a project title to open that project in another tab.</p> <p>Within the Preview pane, select each column's options menu to set specific display options.</p> <p>Also within the Preview pane, select the Gantt "Color by" droplist option, for example, to color by Overall RAG. You can also select the gear icon to configure other Gantt settings. To learn more about display options and Gantt settings, visit the Portfolio Roadmap CSC page.</p> <p>Note that if you want to use a field for a Gantt property and do not need it to show up in the List portion, add it to the List but then deselect the field on the "Show Columns" column property, so that the column is hidden in the rendered List.</p>
Variable Settings	<p>Scope: Organization, Portfolio</p> <p>Filters: Optionally include project filters</p>

12 INTAKE PIPELINE

This report shows a list of requests with key status information. For example, list the requests along with their requester, gate status, desired completion date, metrics, scores, and other key information:

Title	Status	Requester	Requested Completion Date	Mandatory	Payback Period	Strategic Alignment	Complexity	Technical Risk	Score
Benefits Enrollment Forms Update	New	Pace, Sarah	30 Nov 2020						38
Data Center Consolidation	On Hold	Takeston, Sam	31 May 2021						32
eCommerce Expansion	Approved	Pace, Sarah	30 Sep 2020						50
Exchange Upgrade	New	Lamont, Keith	31 Dec 2020						32
Help Desk Relocation	New	Pace, Sarah	15 Sep 2020						38
Inotas Expansion	In Progress	Lamont, Keith	30 Oct 2020						38
Inotas Implementation	On Hold	Lamont, Keith	15 Oct 2020						38
Mobile Device Management	In Progress	Madeleine, Tim	30 Jun 2021						22
Office Revamp	New	Pace, Sarah	04 Jan 2021						42
Registration Website	In Progress	Montecello, Debra	31 Aug 2020						34
SAP to Twilio Integration	Rejected	Pace, Sarah	22 Oct 2020						18
Simplify Intranet	New	Jackanella, Debra	26 Oct 2020						26
Tablet Deployment	In Progress	Enderman, Chet	31 Jul 2020						28

Design View	Selection
General	<p>Topic: Request Type: List</p> <p>Title: <enter a meaningful title></p>
Data	<p>List Fields: Whichever of the following and others would be of value, such as:</p> <ul style="list-style-type: none"> • Title • Gate Status • Requester • Requested Completion Date • Evaluation criteria such as whether the request is Mandatory and selections indicating Payback Period, Strategic Alignment, Complexity, Technical Risk • Request Score (whether calculated field or from scoring model)
Display and Preview List Columns	<p>Configure desired options within the Display tab, such as Drilldown to the request entity.</p> <p>Within the Preview pane, select each column's options menu to set specific display options. Learn about these options on the Intake Pipeline report CSC page.</p>
Variable Settings	<p>Scope: Organization</p> <p>Filters: Optionally include request filters</p>

13 TIMESHEET ENTRIES BY PROJECT-TASK-RESOURCE

This report shows timesheet entries for projects, tasks, or resources. For example, see a crosstab showing total actuals from timesheets, broken out by project, task, and resource:

Timesheet Entry for Project > Task > Resource

Timesheet Entries:
Filter: Timesheet Entries

Time Series
Frequency: Weekly
Date Range: 15 prev NNN weeks 24

Project	Task	Resource	2/17/20	4/6/20	4/27/20	5/4/20	5/11/20	6/22/20	6/29/20	7/6/20	7/13/20	7/20/20	Total Hours
Customer Success Phase 2				24.00									24.00
	High Level Design			4.00									4.00
		Piece, Sarah		4.00									4.00
	Kickoff and Prep			20.00									20.00
		Piece, Sarah		20.00									20.00
Data Center Consolidation						15.00		20.00	20.00	23.00	35.00	31.00	144.00
	Create Design Document & Pro							20.00	20.00				40.00
		Piece, Sarah						20.00	20.00				40.00
	Design									23.00	35.00		58.00
		Piece, Sarah								23.00	35.00		58.00
	Design Activities											31.00	31.00
		Piece, Sarah										31.00	31.00
	Development					15.00							15.00

Design View	Selection
General	<p>Topic: Timesheet Entry Type: Crosstab</p> <p>Title: <enter a meaningful title></p>
Data	<p>Top Axis: Whichever fields (up to 10) would be of value for breaking up the timesheet entry data, but at least a date field such as Start Date that can be used to set the Time Series within Variable Settings (below).</p> <p>Left Axis: Whichever fields (up to 10) would be of value for organizing timesheet entries, such as by Project, Task, Resource, and so on (note that to find the Task Title, you might need to use the field path 'Timesheet Entry > Task ID' and select Title in its available fields).</p> <p>Values: Whichever fields (up to 10) would be of value for representing timesheet entries, particularly Total Hours.</p>
Display	Select desired options within the Display tab, such as row and column subtotals and grand totals.
Variable Settings	<p>Scope: Organization, Portfolio, Project</p> <p>Filters: optionally include filters</p> <p>Time Series: select Frequency and Date Range, the latter of which is very important to ensure high performance when rendering the report, as there can be a great deal of timesheet entry data.</p>



COOKIN' WITH PPM PRO



We encourage you to try these recipes and send us your questions. We'd also love feedback on this cookbook! And, if you want other cookbooks or have recipes to share, let us know!

Email us at productmanagement-ppmpro@planview.com