

Workarounds for PPIDs and Summary Reports 8_0x

White Paper 30088

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Progress and Performance Indicator Definition Workarounds

Snapshot of Tailoring Performed PPID373

The work products that are the sources of data for this report are listed in the table below. On each operational portal, to find the amount of tailoring that has been done on that portal:

Role Properties	Sort by Control Number and count each Control Number including 30000 and up, plus count any record below 30000 that has been edited. This may be hard to see, but it is usually a change from the as-deployed role name to a preferred role name.
PR Folders	Same as above, but any editing below 30000 is usually a change from the as-deployed folder name to a preferred folder name.
Work Products	Same as above, but any editing below 30000 is usually a change from the as-deployed work product name to a preferred work product name.
Work Product Security	Count any records that exist
Additional Steps	Count any records that exist
Field Definitions	Sort by Control Number and count each Control Number including 30000 and up that was created for this portal. If it is not obvious by the field name or if so many fields have been added that you do not know what portal needed the field, then single click

	anywhere on the row other than a hyperlink and 'View History' on its status or any other field to see who added it.
Form Designer (See PR tab\Support Data\Form Designer Support Data)	Sort by Control Number and count each Control Number including 30000 and up.
Notification Rules	Sort by Control Number and count each Control Number including 30000 and up, plus count any record below 30000 that has been edited. These may be hard to see, so we suggest selecting View for all NRs between 1-29999 and then searching for edits you think have been made.

Clearly, this workaround is subject to some human error, but will get close to the amount of actual tailoring that has occurred on this portal.

Snapshot of Training Session Student Evaluation Ratings PPID302

The work product that is its primary source for data is 'Training Sessions Student Evaluations'.

Define a filter for each of the four courses that has been started, such as

The screenshot shows a 'Filter Form' window titled 'Training Sessions Student Evaluations Filters'. The window contains the following fields and options:

- Enter new filter name:** A text input field containing 'Change Requests Short Tour'.
- Control Number:** An empty text input field.
- Status:** A dropdown menu set to 'equals'. The dropdown list is open, showing 'Completed' and 'Under Development'. A note below reads: 'Hold the Control key down while using the mouse to select or deselect items.'
- Originator:** A dropdown menu set to 'equals'. The dropdown list is open, showing 'pragma Systems', 'User One', 'User Three', and 'User Two'. A note below reads: 'Hold the Control key down while using the mouse to select or deselect items.'
- Training Session:** A dropdown menu set to 'equals'. The dropdown list is open, showing 'Change Requests Short Tour - September 2009 Session' and 'Estimating and Tasking Short Tour - December 2009 Session'. A note below reads: 'Hold the Control key down while using the mouse to select or deselect items.'

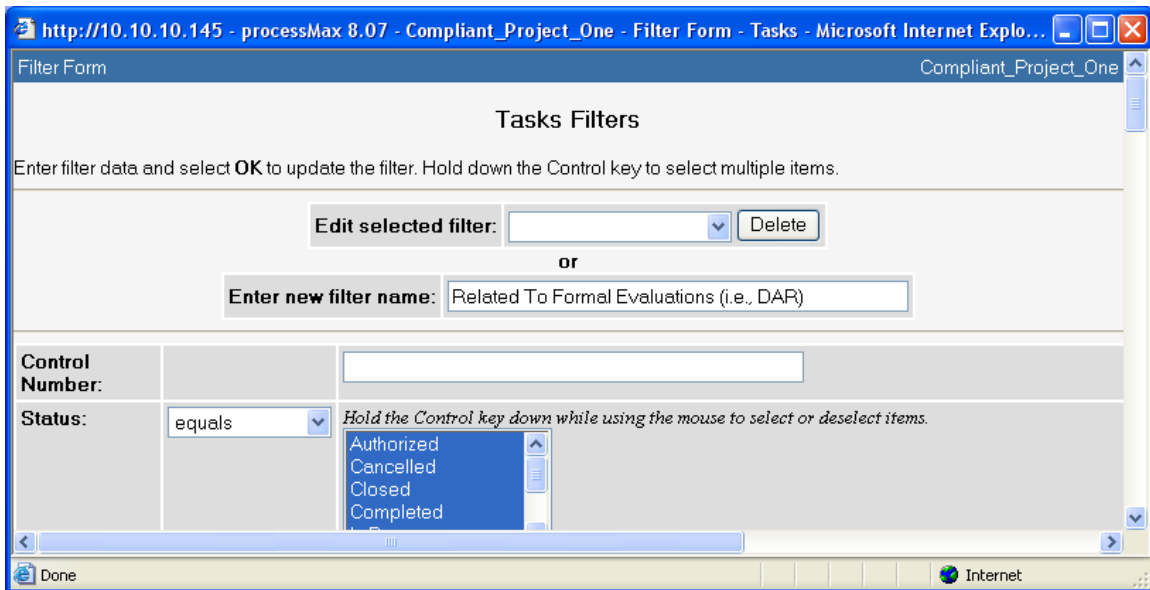
The window title bar reads 'processMax 8.08 - Process Management Programs - Filter For...'. The status bar at the bottom shows 'Done' and 'Trusted sites'.

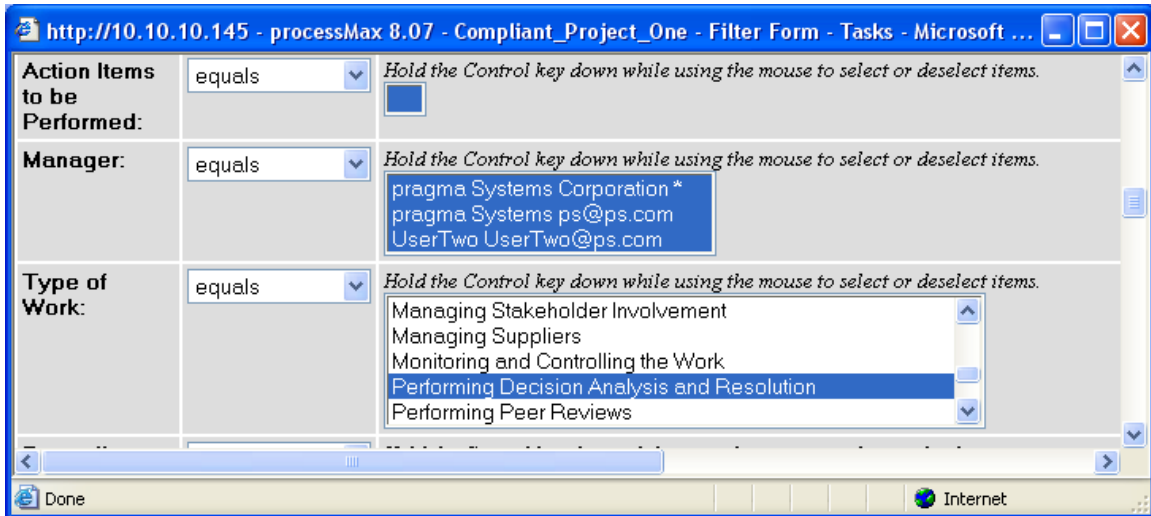
View the feedback on each of the four filters, sorting on columns as needed.

Trend of Actual Cost of Formal Evaluations PPID347

The work product that is its primary source for data is 'Tasks' with Type of Work equal to 'Performing Decision Analysis and Resolution' as its primary source of data. So, the costs of formal evaluations are the actual other direct costs plus the cost of actual effort on those Tasks. The cost of actual effort is the number of hours of effort per labor category on the relevant Tasks.

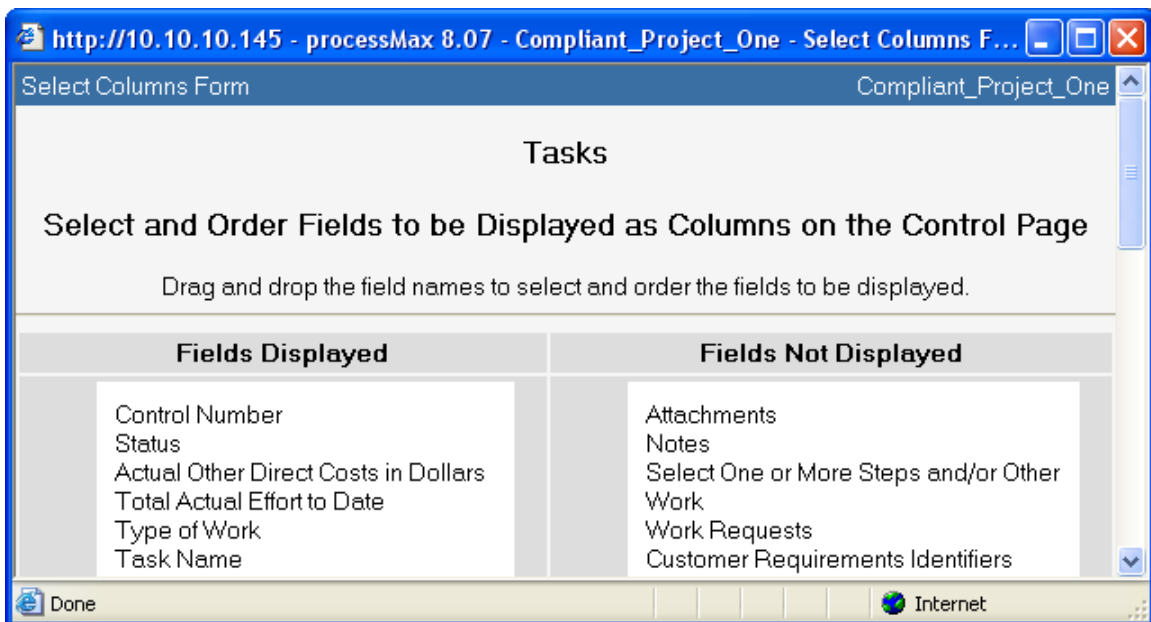
As a workaround, on Tasks on the portal where you need this report, we suggest defining a Filter named 'Related To Formal Evaluations (i.e., DAR)' or name it 'TOW Performing Decision Analysis and Resolution'. Then, select Type of Work 'Performing Decision Analysis and Resolution' as below:





Then, of course, you can select the View button near Actions to see everything about the Tasks that are related to formal evaluations (i.e., Performing Decision Analysis and Resolution).

To see the actual other direct costs and the actual effort for Tasks with Type of Work equal to 'Performing Decision Analysis and Resolution', select the 'Select Columns' button and drag and drop fields so that you can see 'Actual Other Direct Costs in Dollars' and 'Total Actual Effort to Date':



On the portal where you need this report, from the Tasks above, determine the people who have charged effort to them.

See their actual hours of effort.

On the portal where you need this report, from the work product named 'Mapping of Personnel to Labor Categories', find the applicable labor categories and these people.

On the PMP, from the work product named 'Labor Categories and Actual Hourly Rates', find the actual hourly rates for the applicable labor categories.

Now, you have all the pieces to determine the actual labor costs for type of work 'Performing Decision Analysis and Resolution'.

Then, you can add in the other direct costs and create a snapshot, not a trend, of the actual cost of formal evaluations. After enough snapshots, if you need it, you can plot a trend.

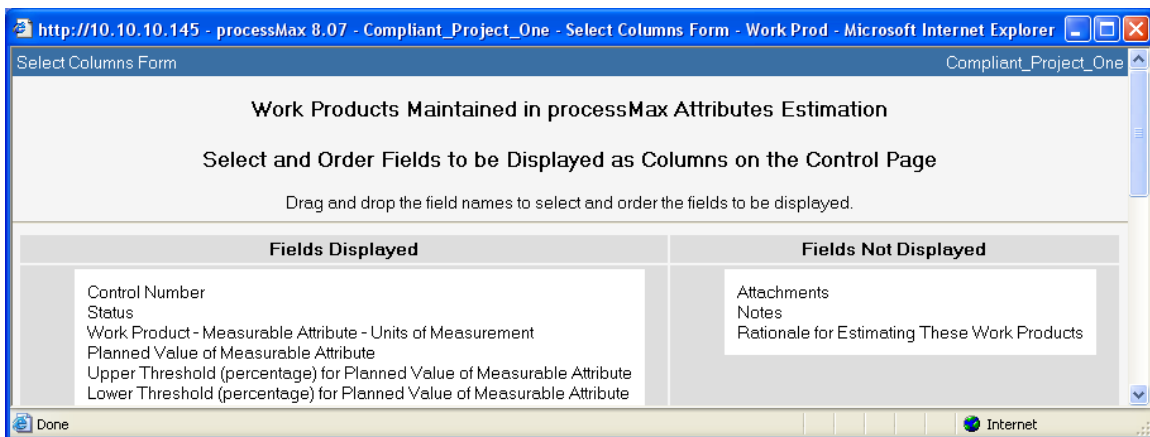
Trend of CMMI Maturity Levels PPID354

So, there is no point in developing a workaround. It takes years and repeated appraisals to develop data for a trend.

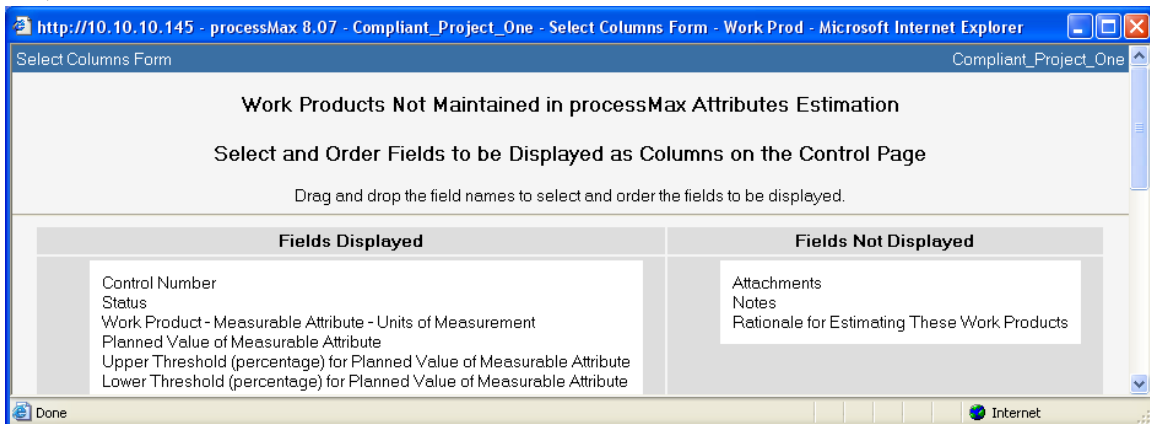
Trend of Planned versus Actual Attributes of Work Products in processMax with Thresholds PPID361

The sources of data for this report are below.

See Thresholds and Planned Values that were used to support estimating the whole project:

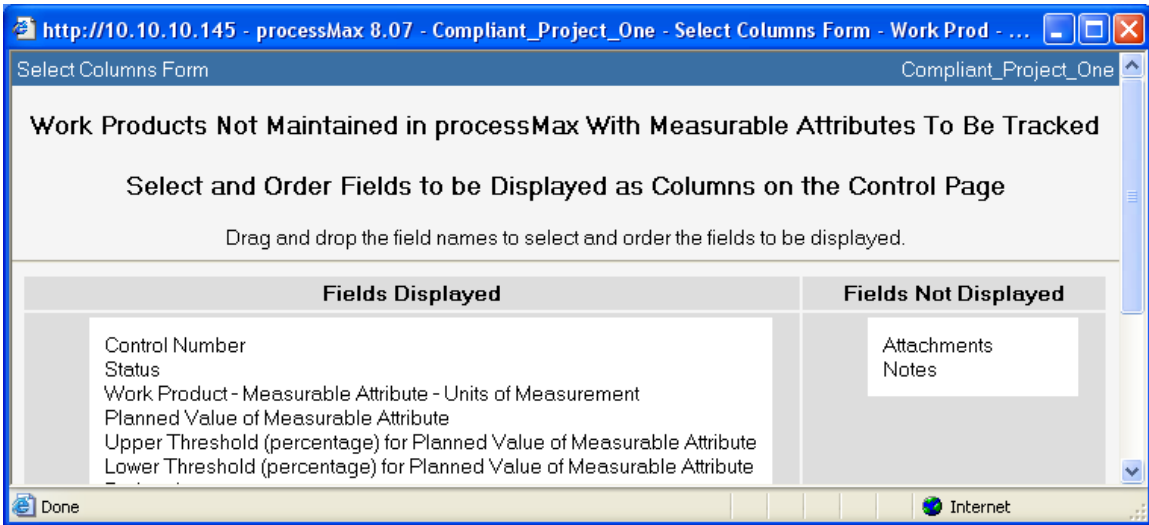
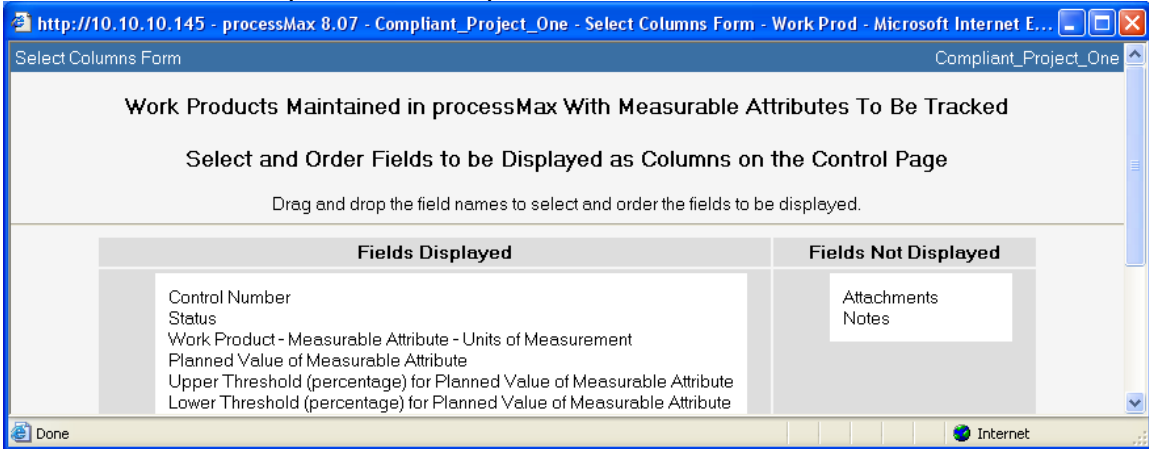


AND



The two work products above are used early in the life-cycle, maybe even in the proposal, as a means of estimating the whole project.

Also, for more work products with planned values and thresholds, see:



For actual values, see:

http://10.10.10.145 - processMax 8.07 - Compliant_Project_One - Select Columns Form - Work Prod - M...

Select Columns Form Compliant_Project_One

Work Products Maintained in processMax Measurable Attributes Tracking Support Data

Select and Order Fields to be Displayed as Columns on the Control Page

Drag and drop the field names to select and order the fields to be displayed.

Fields Displayed	Fields Not Displayed
Control Number Status Work Product - Measurable Attribute - Units of Measurement Cumulative Actual Value of Measurable Attribute Date/Time Entry Updated	Attachments Notes

OK Cancel

Done Internet

AND

http://10.10.10.145 - processMax 8.07 - Compliant_Project_One - Select Columns Form - Work Prod - ...

Select Columns Form Compliant_Project_One

Work Products Not Maintained in processMax Measurable Attributes Tracking

Select and Order Fields to be Displayed as Columns on the Control Page

Drag and drop the field names to select and order the fields to be displayed.

Fields Displayed	Fields Not Displayed
Control Number Status Work Product - Measurable Attribute - Units of Measurement Cumulative Actual Value of Measurable Attribute Date/Time Entry Updated	Attachments Notes

Done Internet

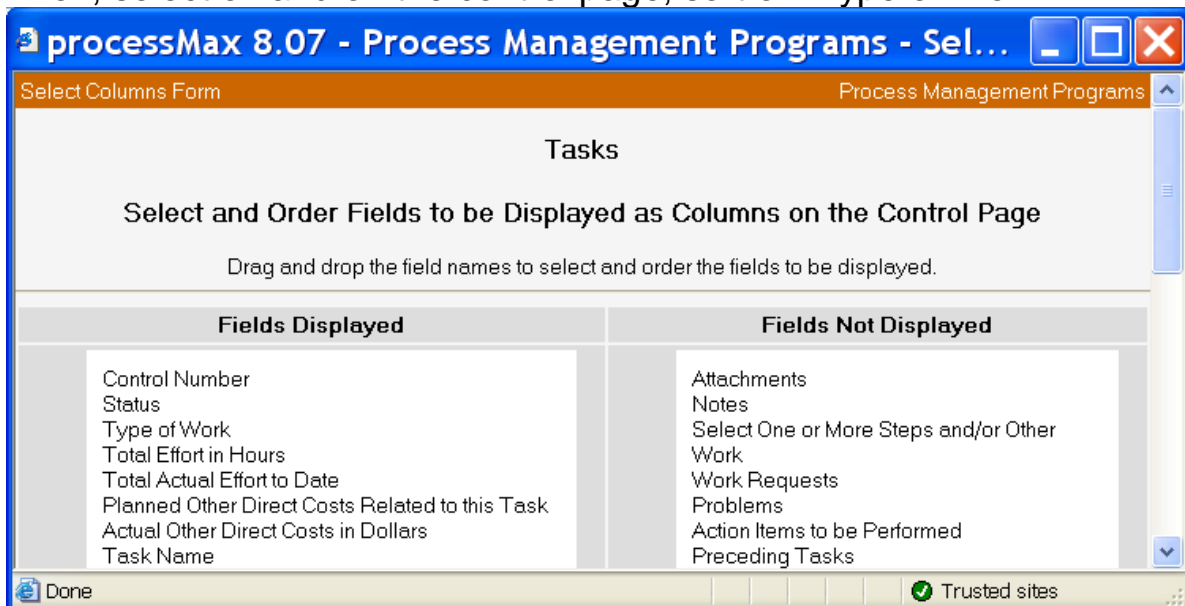
Trend of Planned versus Actual Cost per Type of Work PPID210

The work product that is its primary source for data is 'Tasks'.

Alternative 1: Go to the Tasks control page and select the button 'Select Columns'. Then, move the fields around so that you see:

1. 'Total Effort in Hours', which is total PLANNED effort in hours, the label just does not include the word 'planned',
2. 'Total Actual Effort to Date',
3. 'Planned Other Direct Costs Related to this Task',
4. 'Actual Other Direct Costs in Dollars', and
5. 'Type of Work'.

Then, select ok and on the control page, sort on 'Type of Work'.



If you want a really simple control page display, in Select Columns, move all fields to 'Fields Not Displayed' except for:

1. Type of Work,
2. Total Effort in Hours,
3. Total Actual Effort to Date,
4. Planned Other Direct Costs Related to this Task, and
5. Actual Other Direct Costs in Dollars.

Then, sort on Type of Work.

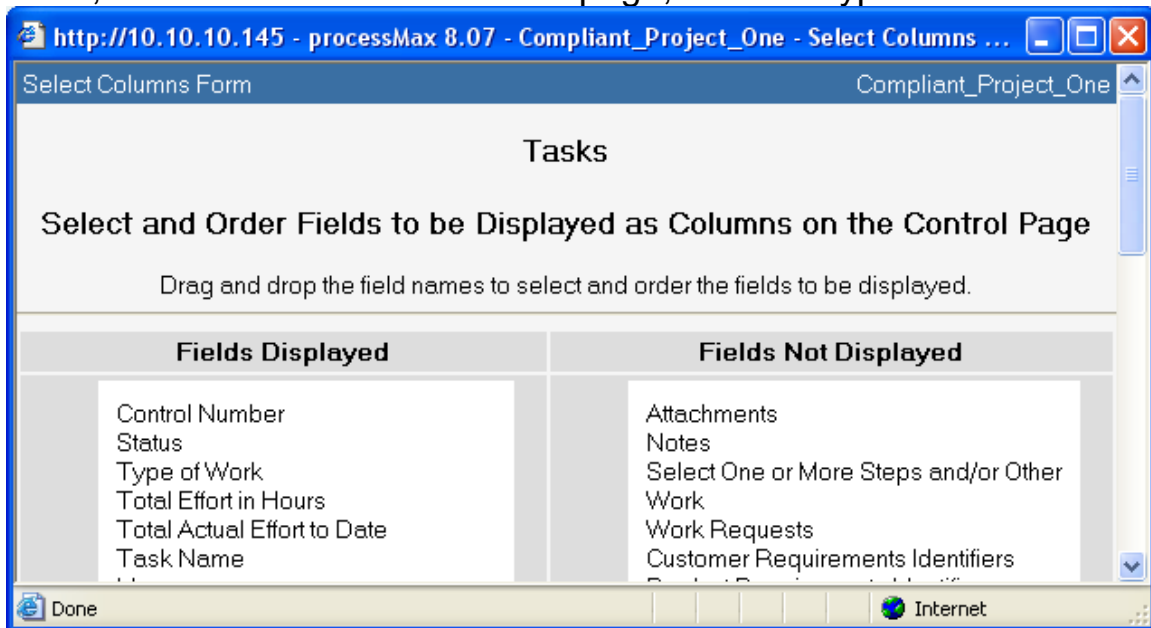
Alternative 2: On the Tasks control page, Export and Save Target As a '.csv' file and do the data manipulation in Excel. Again, the interesting columns are those 3 columns above and the Estimation of Work column is equivalent to 'type of work'.

Trend of Planned versus Actual Effort per Type of Work PPID200

The work product that is its primary source for data is 'Tasks'.

Alternative 1: Go to the Tasks control page and select the button 'Select Columns'. Then, move the fields around so that you see: 'Total Effort in Hours', which is total PLANNED effort in hours, the label just does not include the word 'planned', 'Total Actual Effort to Date', and 'Type of Work'.

Then, select ok and on the control page, sort on 'Type of Work'.



If you want a really simple control page display, in Select Columns, move all fields to 'Fields Not Displayed' except for

6. Type of Work,
7. Total Effort in Hours, and
8. Total Actual Effort to Date.

Then, sort on Type of Work.

Alternative 2: On the Tasks control page, Export and Save Target As a '.csv' file and do the data manipulation in Excel. Again, the interesting columns are those 3 columns above and the Estimation of Work column is equivalent to 'type of work'.

Trend of Planned versus Actual Number of Objective Process Evaluations Performed PPID225

The work product that is its primary source for data is 'Process Evaluations'. Find Process Evaluations on the portal where the report is needed (not PMP Level 2). Define a filter named 'Planned Process Evaluations' and select status values 'Under Development' and 'Identified'

processMax 8.07 - Process Management Programs - Filter Form - Process Evaluations - Microso...

Filter Form Process Management Programs

Process Evaluations Filters

Enter filter data and select **OK** to update the filter. Hold down the Control key to select multiple items.

Enter new filter name:

Control Number:

Status: equals *Hold the Control key down while using the mouse to select or deselect items.*

- Compliant
- Identified
- Noncompliance Resolved
- Noncompliant
- Under Development

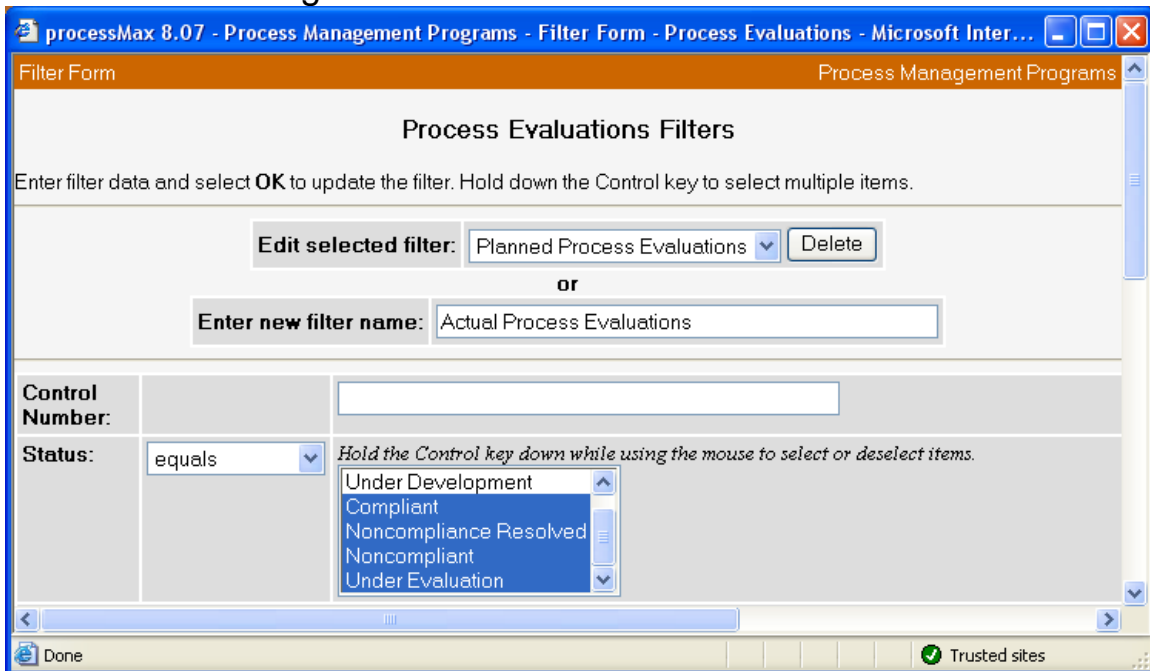
Process to Evaluate

Process Area: equals *Hold the Control key down while using the mouse to select or deselect items.*

CONFIGURATION MANAGEMENT

Done Trusted sites

Define a second filter named 'Actual Process Evaluations' and select all of the remaining statuses:



Then, you can switch back and forth between your filters to see planned versus actual and you can also select and print the View by the Actions on the control page.

To view more than one work product control page at the same time or to view more than one view of the same work product control page at the same time, find a work product, right click on its hyperlink and select 'Open in New Window'. Then, to see a different view of the same work product, find the work product, click through on its hyperlink to its control page, 'Select Columns' and change the column display of the same work product, right click, Open in New Window, and so on.

Trend of Usage of the Organization's Set of Standard Project Processes PPID357

Need to replace 'pmaxengine\scripts\controlpage.pl'.

Workarounds for Work Products that are Summary Reports

Training Topics per Role Across Organization Summary (t381)

This report is very similar to 'Training Topics per Role Summary' which generates on each portal.

So, access the Process Management Programs portal and generate 'Training Topics per Role Summary'.

Then, access any one of the project portals is instantiated from the standard project process that is compliant and generate generate 'Training Topics per Role Summary'.

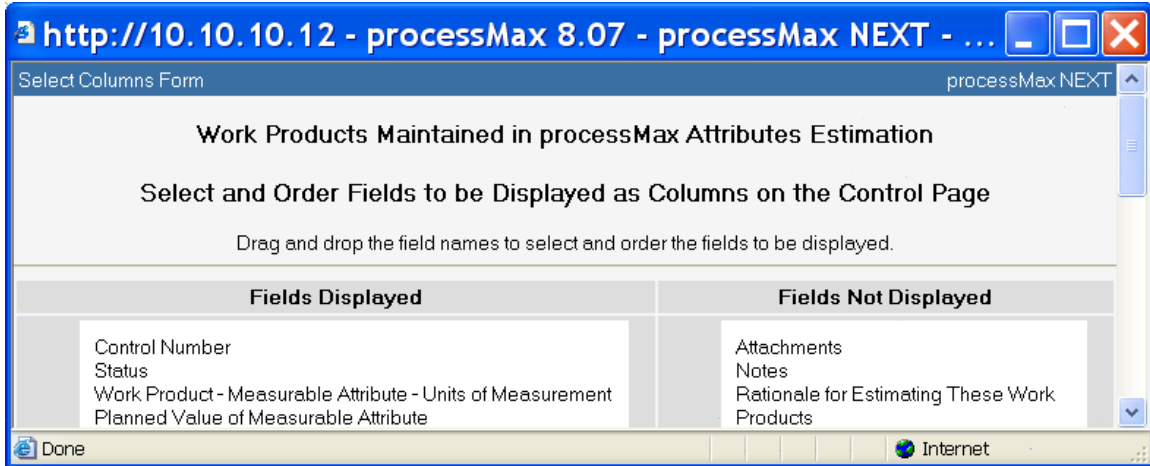
Then, access any one of the project portals, if any, is instantiated from the standard project process that contains the Base process and generate generate 'Training Topics per Role Summary'. Most users are instantiating projects only from the compliant standard project process.

So, you will have to generate the 'Training Topics per Role Summary' report on two portals to get the information that is in 'Training Topics per Role Across Organization Summary'.

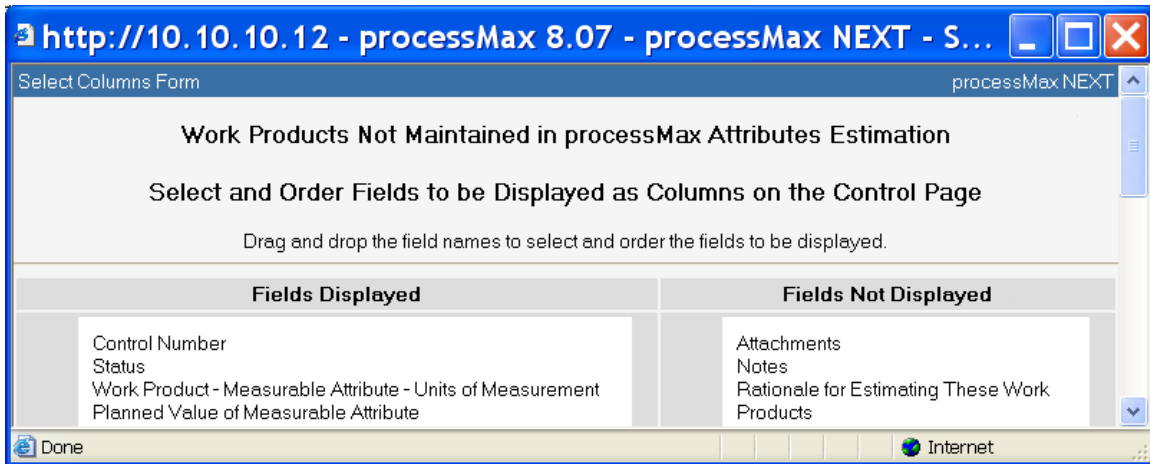
Work Product Attributes Estimation Summary (t382)

The sources of data for this report are below.

See Planned Values that were used to support estimating the whole project:

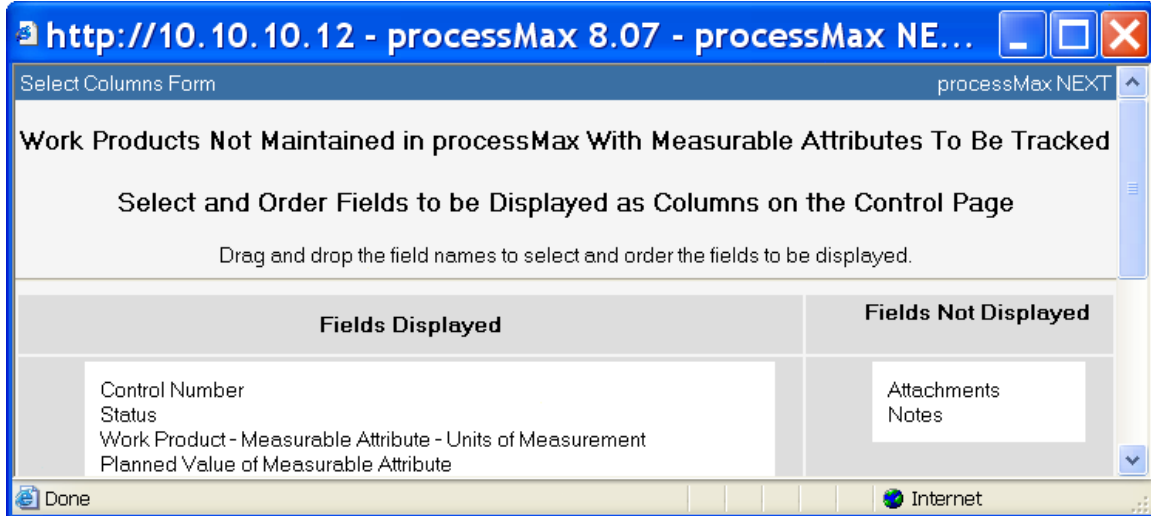
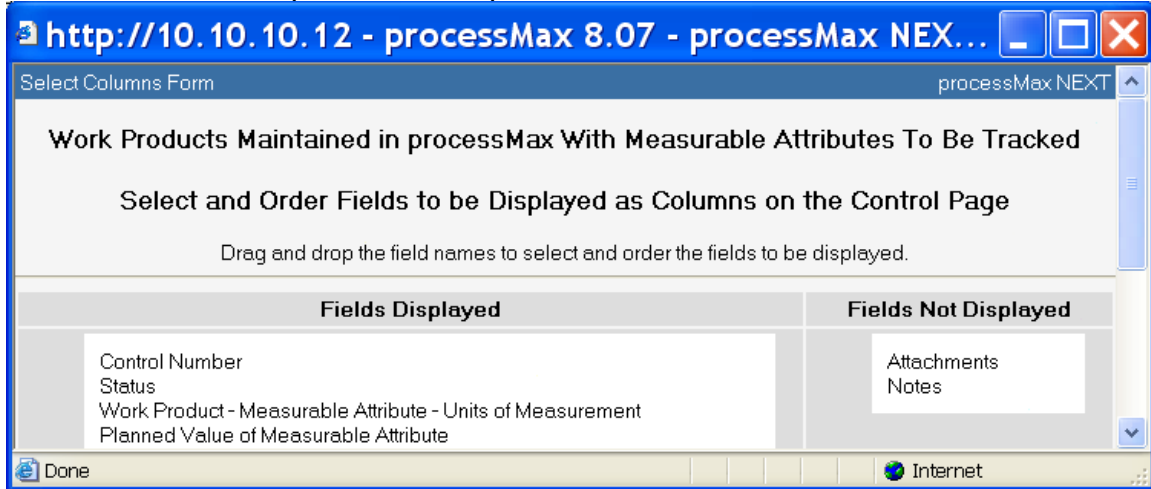


AND



The two work products above are used early in the life-cycle, maybe even in the proposal, as a means of estimating the whole project.

Also, for more work products with planned values, see:



If you expect to review this data periodically, find the Task that authorizes tailoring. To find that Task, you may go to the Tasks control page, clear the Filters, near Actions select the View button, place your cursor on the View, select Ctrl F and type 'tailor'. Ensure the Task is authorized and that you are the primary assignee or an additional assignee. On a Project, it is usually Task 8. On the PMP, it is usually Task 9. Once you are at the step, select its output named 'PR Folders'. Create a meaningfully named folder, such as 'Source Work Products for Work Product Attributes Estimation Summary'. Then, return to the step and select its output named 'Work Products'. Select each work product and scroll down and select this new folder. After you have done this for each of the 4 work products, the new folder will serve as a faster reference to the needed estimation data.