Section 10: *Reporting and Portlets*

Overview

Clarity provides standard reports that organize data extracted from the *Clarity* database. The *Project Management Office (PMO)* has developed a number of customized reports that are designed to provide *Clarity* data that is pertinent to *Oakland County IT's* specific processes and procedures that cannot be obtained with the standard *Clarity* reports.

The available reports (standard and customized) can be found on the **Reports: Available Reports** page. For more information about *Clarity* reports, refer to the *CA* documentation, which can be found in the application **Help** menu.

Clarity reports are produced by *JasperSoft. Report* output can rendered in *Acrobat, PowerPoint,* or *Excel*. *PMO* must assign rights in order to run reports. Once rights are assigned, reports can be accessed from the available reports listed on the **Reports: Available Reports** page.

To run a *Clarity* report:

1. From the **Home** menu, click the **Reports and Jobs** link. The **Reports: Available Reports** page will appear.
2. Click the report name link.
3. From the **Report Properties** page, select the report **Format.** The default format is *PDF. PPTX* and *XLSX* may also be selected.
4. Enter the **Parameters**.
5. Click the **Submit** button.
6. The report will be displayed.

To save frequently used report parameters:

1. From the **Home** menu, click the **Reports and Jobs** link. The **Reports: Available Reports** page will appear.
2. Click the report name link.
3. Enter the **Parameters**.
4. Click the **Save Parameters** button.
5. On the **Save Parameters** popup window, enter a **Saved Parameter Name**, then click the **Save and Return** button.
6. A link to the saved parameters will be displayed on the **Available Reports** page directory underneath the report name. Click this link to run the report using the saved parameters.

To schedule a *Clarity* report:

1. From the **Home** menu, click the **Reports and Jobs** link. The **Reports: Available Reports** page will appear.
2. Click the report name link.
3. From the **Report Properties** page, enter in the **Parameters**.
4. From the **When** section:
    - Uncheck the **Immediately** box
    - Check the **Scheduled** box
    - Enter the **Start Date**
    - Enter the **Start Time**
    - Click the **Set Recurrence** link
    - Set the report schedule as needed
    - Click the **Save and Return** button
5. From the **Notify** section, use the browse icon and select the **Resources to Notify on Failure** and the **Resources to Notify on Completion**.
6. Click the **Submit** button.

Note: Reports are available for 30 days in the *Clarity* **Report Library**.

To change a *Clarity* scheduled report:

1. From the **Home** menu, click the **Reports and Jobs** link. The **Reports: Available Reports** page will appear.
2. Click the **Scheduled Reports** link.
3. From the **Reports: Scheduled Reports** page, click on the report name, make the necessary changes and click the **Submit** button.

To cancel / delete a *Clarity* scheduled report:

1. From the **Home** menu, click the **Reports and Jobs** link. The **Reports: Available Reports** page will appear.
2. Click the **Scheduled Reports** link.
3. From the **Reports: Scheduled Reports** page, check the box next to the report name and click **Cancel Job**.
4. From the **Reports: Scheduled Reports** page, check the box next to the report name and click **Delete Job**.

To create shortcuts to favorites reports, the **My Reports** tab must be on your *Clarity* home page. To add **My Reports** to your home page:

1. From the *Clarity* home page, click the **Personalize** link  in the top right corner.
2. Click the **Add** button.
3. Enter 'My Reports' in the **Title** field and click the **Filter** button.
4. Select the checkbox next to 'My Reports', then click the **Add** button.

To add reports to the **My Reports** portlet:

1. From the **Home** menu, click the **Reports and Jobs** link. The **Reports: Available Reports** page will appear.
2. Check the checkbox next to the report name link.
3. Click the **Add to My Reports** button.

Standard Reports

Missing Time

This report shows resources that have not submitted their timesheet for a specific time period. Enter the following parameters:

Field Name (Characters)	***Value***
Resource OBS	This parameter is optional. Browse to select a specific *Organizational Breakdown Structure (OBS) (e.g. IT Resource Pool).*
Resource Manager	This parameter is optional. Browse to select specific *Resource Manager(s).* If this field is left blank the report will include all active *IT* resources, grouped by *Resource Manager*.
Resource Role	This parameter is optional. Browse to select specific *Resource Role(s).*
Resource	This parameter is optional. Browse to select specific *Resource(s).*
Employment Type	Select specific *Employment Types.* By default, all *Employment Types* will be included.
Time Period	Browse to select the appropriate *Time Periods*.
Timesheet Status	By default, all *Timesheet Statuses* will be included, with the exception of *Adjusted* (i.e. the original timesheet prior to being adjusted).
Group By	By default, the report will be grouped by *Resource Manager.*
Calculate Missing Time Based on Timesheet Status?	By default, this parameter is unchecked.
Include Inactive Resources?	By default, this parameter is unchecked.
Show Timesheet Summary Graph?	By default, this parameter is checked.

Project Issue Register

This report provides a listing of the issues logged in *Clarity*. By default, closed issues are not included on this report. Enter the following parameters:

Field Name (Characters)	***Value***
Project OBS	This parameter is optional. Browse to select an *OBS (e.g. Master Plan Activity 2019-2020).*
Project Type	This parameter is not applicable. Leave as the default.
Project Manager	This parameter is optional. Browse to select specific *Project Manager(s)*.
Sponsor	This parameter is not applicable. Leave as the default.
Project	This parameter is optional. Browse to select specific *Project(s)*.

Project Status	This parameter is not applicable. Leave as the default.
Work Status	This parameter is not applicable. Leave as the default.
Issue Priority	Multiple *Priorities* can be selected. The default is all *Priorities.*
Issue Status	Multiple *Statuses* can be selected. The default is all *Statuses* except *Closed.*
Sort By	By default, the report will be sorted by *Created Date.*
Group By	By default, the report will be grouped by *Project.*
Show Notes?	*Issue Notes* are typically not used at *OCIT.*
Show Associated Action Items?	*Issue Action Items* are typically not used at *OCIT.*
Show Associated Tasks?	*Issue Associated Tasks* are typically not used at *OCIT.*
Include Programs?	By default, the report will include *Programs.*
Include Inactive Projects?	By default, the report will not include *Inactive* projects. *Closed* projects are different than *Inactive* project. *Closed* projects will be included on the report.

Timesheet Detail

This report shows resources that have not submitted their timesheet for a specific time period. Enter the following parameters:

NOTE: If you are a contractor who frequently uses this report to print your timesheet, it is recommended that you enter your own name in the *Resource* field, then Save Parameters. Refer to page 1 of this document for more information on saving report parameters.

Field Name (Characters)	***Value***
Resource OBS	This parameter is required. By default, *IT Resource Pool: IT Resources* will be included.
Resource	This parameter is required. Browse to select specific *Resource(s).*
Timesheet Status	This parameter is required. By default, only *Posted* timesheets will be included.
Time Period	This parameter is required. Browse to select the appropriate *Time Period(s)*.

Custom Reports

Change Request

This report is used to print the *Project Change* Request and *Project On-Hold* Request forms in order to obtain customer signatures. Refer to *Section 4: Change Request Process,* for more information. Enter the following parameters:

Field Name (Characters)	***Value***
Form Indicator	This parameter is required. Select the appropriate *Form Indicator* from the drop down. **Request Type**: • *Project Change Request* • *Project On-Hold Request*
Change ID	This parameter is optional; however, it is recommended that the *Change Request* be selected from the browse.
Project	This parameter is optional; however, it is recommended that the project be selected from the browse.

Master Plan Activity

This report displays the *Master Plan Activity* for *Enhancement & New Development* projects. Enter the following parameters:

Field Name (Characters)	***Values***
Master Plan Type	Defaults to *Enhancement & New Development*.
Master Plan Year	Select the current *Master Plan* year.
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group* and only that *Leadership Group* will be included in the report. If this field is left blank the report will include all *Leadership Groups*.
Start Date	Enter the *Start Date* for the report. This date determines the *Actual Usage* column on the report.
End Date	Enter the *End Date* for the report. This date determines the *Actual Usage* column on the report.
Show Page Footer	Check the box to display the run date at the bottom of report.

Master Plan Planned Maintenance & Upgrades

This report displays the *Master Plan Planned Maintenance & Upgrades* activity. Enter the following parameters:

Field Name (Characters)	***Value***
Program	This report must be run for one *Leadership Group* at a time. Browse to select the appropriate program.
Leadership Group	Select the appropriate *Leadership Group* from the drop down. Team projects may include activities with multiple *Leadership Groups*, and by selecting the *Leadership Group* with the *Program*, the report will include the appropriate activities.
Start Date	Enter the *Start Date* for the report. This date determines the *Actual Usage* column on the report.
End Date	Enter the *End Date* for the report. This date determines the *Actual Usage* column on the report.
Master Plan Year	Select the appropriate *Master Plan Year.*
Show Page Footer	Check the box to display the run date at the bottom of report.

Master Plan Summary by Leadership Group

This report displays the *Master Plan Summary by Leadership Group* activity for Enhancements/New Development, Planned Maintenance/Upgrades, and Support/Maintenance. Enter the following parameters:

Field Name (Characters)	***Value***
Program	This report must be run for a *Leadership Group Program*. Defaults to the current *Master Plan Program*.
Master Plan Year	Defaults to the current *Master Plan Year*.
Start Date	Defaults to the current *Master Plan Start Date*.
End Date	Defaults to the current *Master Plan End Date*.
Actuals Thru Date	Enter the *End Date* for the report. This date determines the *Actual Hours* on the report.
Target Percent	Select the *Target Percent* for the first year of the report, based on the fiscal quarter. For example, if this report is being run at the end of the first quarter of the first fiscal year, the *Target Percent* would be *25%*. If this report is being run at the end of the first quarter of the second fiscal year, the *Target Percent* would be *100%*.
Show Page Footer	Check the box to display the run date at the bottom of report.

Master Plan Total Usage Summary

This report displays the *Master Plan Summary* activity for Enhancements/New Development, Planned Maintenance/Upgrades, and Support/Maintenance. Enter the following parameters:

Field Name (Characters)	***Value***
Program	This report must be run for a *Leadership Group Program*. Defaults to the current *Master Plan Program*.
Master Plan Year	Defaults to the current *Master Plan Year*.
Start Date	Defaults to the current *Master Plan Start Date*.
End Date	Defaults to the current *Master Plan End Date*.
Second Year	Select this check box if this is the second year of the Master Plan.

Master Plan Support & Maintenance

This report displays the *Master Plan Support & Maintenance* activity for Support/Maintenance projects. Enter the following parameters:

Field Name (Characters)	***Value***
Program	This report must be run for a *Leadership Group Program*. Browse to select the appropriate program.
Leadership Group	Select the appropriate *Leadership Group* from the drop down. Team projects may include activities with multiple *Leadership Groups*, and by selecting the *Leadership Group* with the *Program*, the report will include the appropriate activities.
Start Date	Defaults to the current *Master Plan Start Date*.
End Date	Enter the *End Date* for the report. This date determines the *Actual Hours* on the report
Fiscal Year	Defaults to the current *Fiscal Year*.
Second Year	Select this check box if this is the second year of the Master Plan.
Show Page Footer	Check the box to display the run date at the bottom of report.

Project Storyboard

This report provides a high-level overview of a project, including hours and schedule variance, issues, and scope change requests. Links on the report provide lower-level, detailed information about the project. Enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is optional. Browse to select a specific *OBS.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager.*
Include Preliminary	This parameter is required and defaults checked which includes preliminary tasks. To exclude preliminary tasks uncheck the checkbox.
Include Closed Projects?	This defaults to unchecked. By default, closed projects will not be included on the report. If this checkbox is checked, closed projects will be included.
Project	This parameter is optional. Browse to select a specific *Project*.

Resource Utilization Detail

This report is typically used to resolve resource overcommitment issues. It shows the number of hours a resource is working on each project, broken out by month. The report compares the hours a resource is available to work to the hours that resource is assigned to projects. Resources with a positive *Difference* have availability. Resources with a negative *Difference* are overcommitted. Enter the following parameters:

Field Name (Characters)	***Value***
Resource OBS	This parameter is optional. Browse to select a specific *Resource OBS.* If this field is left blank the report will include all *IT* resources. Note that generic resources are not part of the resource OBS.
Resource Manager	This parameter is optional. Browse to select a specific *Resource Manager.* If this field is left blank the report will include all active *IT* resources, grouped by *Resource Manager*.
Resource	This parameter is optional. Browse to select a specific *Resource.* If this field is left blank the report will include all active *IT* resources.
Assigned to Project	This parameter is optional. Browse to select a specific *Project*. The report will only show all the projects to which those resources are assigned to the selected project. If this field is left blank the report will include all active *IT* resources, regardless of project assignment.
Start Date	Enter the *Start Date* for the report. Any date may be entered, but the report will always include data from the first day of that month. For example, if you enter *1/15/14* as the *Start Date*, the report actually begins on *1/1/14.*
Number of Months	Enter the number of months to be displayed on the report. The maximum number of months that can be displayed is *12*.

Resource Utilization Summary

This report is typically used to monitor resource availability and over commitment, especially when preparing a project for project approval. It shows the number of hours a resource is assigned to projects, broken out by month. Resources that show a positive *Available* amount have availability. Resources that show a negative *Available* amount are over committed. Enter the following parameters:

Field Name (Characters)	***Values***
Resource OBS	This parameter is optional. Browse to select a specific *Resource OBS.* If this field is left blank the report will include all *IT* resources. Note that generic resources are not part of the resource OBS.
Resource Manager	This parameter is optional. Browse to select a specific *Resource Manager*. If this field is left blank the report will include all active *It* resources, grouped by *Resource Manager*.
Resource	This parameter is optional. Browse to select a specific *Resource.* If this field is left blank the report will include all active *IT* resources.
Assigned to Project	This parameter is optional. Browse to select a specific *Project.* The report will only show all the projects to which those resources are assigned to the selected project. If this field is left blank the report will include all active *IT* resources, regardless of project assignment.
Start Date	Enter the *Start Date* for the report. Any date may be entered, but the report will always include data from the first day of that month. For example, if you enter *1/15/14* as the *Start Date*, the report actually begins on *1/1/14.*
Number of Months	Enter the number of months to be displayed on the report. The maximum number of months that can be displayed is *12*.

Usage Analysis – Activity Level

This report is most often used to monitor percent complete in *Team* and *Non-Project* plans, in order to determine if fixed, locked, uniform loaded activities are on track. However, it can be run for any project.

Field Name (Characters)	***Values***
Project	Browse to select a *Project.*

Usage Analysis - Task Level

This report is most often used to monitor percent complete in projects with fixed, locked, and uniform loaded tasks. However, it can be run for any project. Enter the following parameters:

Field Name (Characters)	***Values***
Project	Browse to select a *Project.*

Portlets

Portlets are small windows of information presented as graphs, tables, or web page snippets that appear automatically. *PMO* has developed several customized portlets that are available within *Clarity.* Portlets can be accessed via links from the menu bar or by adding a portlet tab to your personal page. To access a portlet from the menu, click on one of the following links:

Personal

PM Portlets
Weekly Hours
Past ETC
Issues
Timesheet Notes
Invalid Financial Transactions
Project Billing by Task

Team Member Portlets
Resource Look-Ahead

Job Log
Job Log

Executive Reporting

Portfolio Dashboard
Portfolio Dashboard
Delivery by Leadership Group
Project Schedule Gantt

Project Variance
Unbaselined Projects
Negative Variance
Positive Variance
Schedule Variance
Projects On-Hold
Unbaselined Tasks
Scope Budget Exceeded
On-Hold with Actuals

Project Validation
Invalid LG Codes
Planned Maint > 400
Tasks > 200
Sized Projects
Date Renegotiation

Project Allocation
Allocation Variance
Program Allocation
Rollover Projects
Allocation Increase

TSN Prioritization
TSN Prioritization

Master Plan Activity
Master Plan Activity

Strategic Plan Mapping
IT Strategic Plan Mapping

Resource Management

Resource Planning
Unfilled Roles
Role Demand
Role Demand by Project

Workloads
Allocation Detail
Weekly Detail
Capacity Graph

To add a portlet to your personal page:

1. Click the **Manage My Tabs** link in the upper right-hand corner of your **Overview** page.
2. From the **Manage Tabs** page, click the **New** button.
3. From the **Personalize: Page Properties** page, enter a **Tab Name** (portlet being added; *i.e., Issue Tracking*) and a **Description** (same as tab name).
4. Click the **Save and Continue** button.
5. From the **Page Content** page, click the **Add** button.
6. From the **Select Content** page, select the portlet name you wish to include on the tab *(i.e., Issue Tracking).*
7. Click the **Add** button.
8. Click the **Continue** button.
10. Click the **Return** button.
11. From the **Manage Tabs** page, click the **Return** button.

Personal

Weekly Hours

This portlet allows *Project Managers* to review the hours a *Resource* has entered on their timesheet, prior to the timesheet being posted. Similar to reviewing timesheets, the *Project Manager* can easily go through the information from the timesheet and request that the *Resource* make any adjustments prior to posting. Catching a discrepancy prior to posting eliminates the need to create an adjustment timesheet and ensures that project information is correctly tracked in a timely manner.

The default sort is by *Resource Name, Project ID,* and *Task ID.* The *Project ID* column provides a link to the *Project Overview* page. From the *PM Portlets* link, click the *Pending Actuals* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Project	This parameter is optional. Browse to select a specific *Project*.
Resource	This parameter is optional. Browse to select a specific *Resource.* If this field is left blank the portlet will include all active *IT* resources.
Time Period Start	Enter the *Time Period Start Date* for the report. This date determines the *Tasks* and the *Timesheet Hours* that appear on the portlet.
Time Period Finish	This parameter is optional. If this field is left blank the portlet will include all time periods from the *Time Period Start* date.
Timesheet Status	This parameter is optional. Browse to select a *Timesheet Status*.

Past ETC

This portlet allows *Project Managers* to view *Resources* with estimates in the past for a specific time period. Similar to the *Past ETC Not = 0* view in *Open Workbench*, the *Project Manager* can easily determine *Resources* that have estimates in the past. The default sort is by *Project ID, Task ID* and *Resource Name.* The *Resource Name* column provides a link to the *Assignment Properties* page and the *Task Name* column to the *Project Properties* page. From the *PM Portlets* link, click the *Past ETC* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS.
Resource Manager	This parameter is optional. Browse to select a specific *Resource Manager.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Project	This parameter is optional. Browse to select a specific *Project.*
Actuals Thru Date	Enter the *Actuals Thru Date* for the report. This date determines the hours in the *Period Actuals* column on the report.

Field Name (Characters)	***Value***
Resource	This parameter is optional. Browse to select a specific *Resource*. If this field is left blank the report will include all active *IT* resources.
Project Status	This parameter is optional. Browse to select a *Project Status.*

Issues

This portlet displays issues for projects within the *Clarity* application. The default sort is by *Project Name*. The *Issue ID* column provides a link to the *Issue Properties: Main* page, where the issue can be managed. The *Project Name* column provides a link to the *Project Dashboard* page. From the *PM Portlets* link, click the *Issues* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is optional. Browse to select a specific *OBS.*
Project	This parameter is optional. Browse to select a specific *Project.*
Owner	This parameter is optional. Browse to select a specific *Owner.*
Assigned To	This parameter is optional. Browse to select a specific *Resource*. If this field is left blank the report will include all active *IT* resources.
Priority	This parameter is optional. Select a *Priority* from the drop down.
Issue Status	This parameter is optional. Select an *Issue Status* from the drop down.
Max Reso Target Date	This parameter is optional. Select or enter a Maximum Resolution Target Date.

Timesheet Notes

This portlet displays timesheets that have task-level notes (timesheet-level notes are not displayed). The default sort is by *Time Period,* then by *Resource,* then by *Project*. From the *PM Portlets* link, click the *Timesheet Notes* tab and enter the following parameters:

Field Name (Characters)	***Value***
Time Period From	Select a *Time Period Start Date* from the date picker. The default date is the start of the previous quarter.
Time Period To	Select a *Time Period End Date* from the date picker. The default date is the end of the previous week.
Charge Code	This parameter is optional. Browse to select a Charge Code.
Resource Manager	This parameter is optional. Browse to select a specific *Resource Manager.*
Resource	This parameter is optional. Browse to select a specific *Resource.*
Project	This parameter is optional. Browse to select a specific *Project*.

Invalid Financial Transactions

This portlet shows invalid financial transactions created during the weekly *Post Timesheets* process. Most of the time there are no invalid financial transactions so this portlet is usually blank. From the *PM Portlets* link, click the *Invalid Financial Transactions* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project	Browse to select a specific *Project.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Resource	This parameter is optional. Browse to select a specific *Resource*.

Project Billing by Task

This portlet shows project cost for a specific date range. It is identical to the *Project Billing* report, but at the task level. This portlet is most frequently used to show tasks charged to a particular project in a *Team Plan* such as *Customer Support* or *Systems Maintenance.* By default, the portlet shows only the actual hours billed during the date range, but it can be configured to show pending transactions (work completed but not yet billed) and ETC. From the *PM Portlets* link, click the *Project Billing* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project	This parameter is optional. Browse to select a specific *Project.*
Start Date	Select a date from the date picker. If this field is left blank the portlet will display all hours and cost from the date the project started.
Finish Date	Select a date from the date picker. If this field is left blank the portlet will display all hours and cost through the date the project finished.
Charge Code	This parameter is optional. Browse to select a Charge Code.
Include Zero Bill?	By default, resources with e $0 bill rate are included in the portlet. Change to *No* to show only billable resources.

Resource Look-Ahead

This portlet allows *Team Members* to view their assigned tasks for a given time period, including ETC for the time period and any unposted actuals from the resource's timesheet. The default sort is by *Resource,* then by *Task Scheduled Finish Date*. From the *Team Member Portlets* link, click the *Resource Look-Ahead* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project	This parameter is optional. Browse to select a specific *Project.*
ETC From Date	Select a date from the date picker. The default date is the start of the current week.
ETC Through Date	Select a date from the date picker. The default date is today's date.
Resource	This parameter is optional. Browse to select a specific *Resource*.

Note that when projects undergo a date renegotiation, the individual tasks in the project are not rebaselined. In cases like this, the *Finish Variance (Days)* field may show a large amount of negative variance.

Job Log

This portlet displays all scheduled occurrences of the *Time Slicing* and *Rate Matrix Extraction* jobs. When performing project planning activities, the current *Resource Rate* and *Utilization* information must be current in *Open Workbench;* Project Managers can ensure current information by checking the last time these jobs executed.

Executive Reporting

Portfolio Dashboard

This portlet displays both detailed and summary information about projects, including alerts indicating projects experiencing different types of variances. All information displayed on the *Portfolio Dashboard* is based on the projects' Non-Preliminary tasks only. The default sort for the detailed section of the portlet is by *Leadership Group* and *Priority.* The *Project ID* column provides a link to the *Project Overview* page. From the *Executive Reporting* menu, click the *Portfolio Dashboard* link and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS.
Include Closed Projects?	This parameter is required. Browse to select *Yes* or *No* for including /excluding closed projects. The default value is *NO (e.g. exclude closed projects).*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Project	This parameter is optional. Browse to select a specific *Project*.
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*

Delivery by Leadership Group

This portlet displays a pie chart showing the distribution of actual hours worked by OCIT staff broken out by Leadership Group. From the *Executive Reporting* menu, click the *Portfolio Dashboard* link, select the *Delivery by Leadership Group* tab and enter the following parameters:

Field Name (Characters)	***Value***
Start Date	This parameter is required. The default value is the current *Master Plan Start Date.*
Finish Date	This parameter is required. The default value is today's date.
Resource OBS	This parameter is required. Browse to select a specific resource *OBS.* The default value is the *IT Resource Pool.* Drill down to select a specific Division or Team.

OBS Unit	This parameter is optional. It indicates which nodes of the OBS should be included. It is recommended to leave it as the default value of *Unit and Descendants.*
Labor Type	This parameter is optional. Multiple *Labor Types* may be selected. For example, *Enhancement* and *New Development.*
Employee Type	This parameter is optional. Browse to select a specific *Employee Type.*
Resource Manager	This parameter is optional. Browse to select a specific *Resource Manager*.
Resource	This parameter is optional. Browse to select a specific *Resource*.
Role	This parameter is optional. Browse to select a specific *Role.*

Project Schedule Gantt

This portlet displays a Gantt chart showing project schedule information, broken out by fiscal quarter. The top bar in the Gantt shows the current project schedule. The dark line within the current schedule bar shows the percent complete. The bottom bar in the Gantt shows the most recent baseline schedule. The Gantt bars change color based on the following criteria:

Green: Project is 0-14 days early or 0-14 days late.
Yellow: Project is 15-29 days early or 15-29 days late.
Red: Project is 30 days or more early or 30 days or more late.
Grey: Project is not baselined

The blue summary bar at the bottom of the Gantt indicates *Total ETC* for all projects displayed on the portlet. A blue bar in a past quarter indicates past ETC in a project; that project needs to be autoscheduled.

From the *Executive Reporting* menu, click the *Portfolio Dashboard* link, select the *Project Schedule Gantt* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS.
OBS Unit	This parameter is optional. It indicates which nodes of the OBS should be included. It is recommended to leave it as the default value of *Unit and Descendants.*
Stage Identifier	This parameter is optional. The default value is *Analyze*, which includes only approved Master Plan projects and excludes Open Requests.
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Master Plan Type	Defaults to blank (all). Browse to select a specific *Master Plan Type.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.

Unbaselined Projects

This portlet displays projects within the *Clarity* application that have time (*Actuals*) charged, but have not been baselined. Both *Project Management* and *Core time (Actuals)* charged are displayed. The default sort is by *Actuals.* The *Project ID* and the *Project Name* columns provide a link to the *Project Dashboard* page. From the *Project Variance* link, click the *Unbaselined Projects* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.

Negative Variance

This portlet displays open projects with a usage variance less than *-0.1%.* The default sort is by *Variance Percent*. The *Project ID* and the *Project Name* columns provide a link to the *Project Dashboard* page. From the *Project Variance* link, click the *Negative Variance* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
OBS	This parameter is required. Browse to select a specific *OBS.*

Positive Variance

This portlet displays open projects with a usage variance greater than *0.1%.* The default sort is by *Variance Percent*. The *Project ID* and the *Project Name* columns provide a link to the *Project Dashboard* page. From the *Project Variance* link, click the *Positive Variance* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
OBS	This parameter is required. Browse to select a specific *OBS.*

Schedule Variance

This portlet displays open projects with a schedule variance of +/- 30 days*.* The default sort is by *End* Days *Variance*. The *Project ID* and the *Project Name* columns provide a link to the *Project Dashboard* page. From the *Project Variance* link, click the *Schedule Variance* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
OBS	This parameter is required. Browse to select a specific *OBS.*
Exclude On-Hold?	This parameter is required. Browse to select *Yes* or *No* for including /excluding projects with a status of *On-Hold*.

Projects On-Hold

This portlet displays all projects where the *Project Status* is *On-Hold*. The default sort for this portlet is by the date the project went on-hold. The *Project ID* column provides a link to the *Project Overview* page. From the *Project Variance* link, click the *Projects On-Hold* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.

Unbaselined Tasks

This portlet displays tasks within *Clarity* projects that have time (*Actuals*) charged, but have not been baselined. The default sort is by *Project ID* and *Task ID.* The *Project ID* and the *Project Name* columns provide a link to the *Project Overview* page. The *Task ID* and *Task Name* provide a link to the *Task Properties* page. From the *Project Variance* link, click *Unbaselined Tasks* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Project	This parameter is optional. Browse to select a specific *Project.*
Project Status	This parameter is optional. Browse to select a *Project Status*.
Task Status	This parameter is optional. Browse to select a *Task Status*.
Exclude Budgets	This parameter is optional. Browse to select Yes or No for including /excluding budgets.
Exclude Preliminary	This parameter is optional. Browse to select *Yes* or *No* for including /excluding preliminary tasks.

Scope Budget Exceeded

This portlet displays projects where the *Total Usage* of the *Scope Tasks* exceeds the *Scope Change Management* baseline. The default sort is by *Scope Variance.* The *Project ID* and the *Project Name* columns provide a link to the *Project Overview* page. From the *Project Variance* link, click *Scope Budget Exceeded* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Status	This parameter is optional. Browse to select a *Project Status.*

On-Hold with Actuals

This portlet displays projects where the *Project Status* is *On-Hold*, but time has been tracked to the project for tasks other than *Project Management*. Projects where time has been tracked only to *Project Management* tasks will not be displayed on this portlet.

The default sort for this portlet is by date. The *Project ID* column provides a link to the *Project Overview* page. From the *Project Variance* link, click the *On-Hold with Actuals* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.*
From	Select a *Time Period Start Date* from the date picker. The default date is the start of the previous month.

Invalid LG Codes

This portlet displays all *Activities* in *Customer Support, System Maintenance,* and *Planned Maintenance & Upgrade* team plans with an incorrect Leadership Group code entered in the activity's *ID* field. The default sort is by *Project ID.*

From the *Project Validation* link, click the *Invalid LG Codes* tab and enter the following parameters:

Field Name (Characters)	***Value***
Activity Status	This parameter is optional. Multiple statuses can be selected at one time. The default is Activities that are *Not Started* and *Started.*

Planned Maintenance >400 Hours

This portlet displays all *Activities* in the *Planned Maintenance & Upgrade* team plans with a *Revised Total Estimate* of 400 hours or more. Detailed *Planned Maintenance* plans are not included on this portlet. *Activities* with *Actuals* greater than zero hours are flagged in red. The default sort is by *Actuals.*

Planned Maintenance & Upgrade projects with an ETC greater than 400 hours require a detailed project plan with a Project Management (PM) phase. Refer to standard in *Section 11: Master Planning,* Project Definition. Exceptions include projects that are performed on a routine (monthly or quarterly) basis. Examples would be Microsoft Patch Deployment and Disaster Recovery Toolkit Maintenance.

The *Project ID* and *Project Name* fields provide a link to the *Project Dashboard* page. The *Activity Name* provides a link to the *Work Breakdown Structure* page. The default filters are to show all *Activities* that are not *completed* and to exclude Budgets. From the *Project Validation* link, click the *Planned Maintenance >400 Hours* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Project	This parameter is optional. Browse to select a specific *Project.*
Exclude Budgets	This parameter is required. Browse to select *Yes* or *No* for excluding budgets.
Category	This parameter is optional. Enter in an *X* to exclude those activities where it is indicated that a detail will be created.

Field Name (Characters)	***Value***
Activity Status	This parameter is optional. Click the *Activity Status* to be displayed. **Note:** Allows for multiple status selection.

Tasks >200 Hours

This portlet displays all *Tasks* in *Enhancement* and *New Development* plans with a *Revised Total Estimate* of 200 hours or more. Tasks for *Scope Change Management* budgets, budgeted tasks, and preliminary estimates are not included on this portlet. *Tasks* with *Actuals* greater than 200 hours are flagged in red. The default sort is by *Project ID.*

Field Name (Characters)	***Value***
Project	This parameter is optional. Browse to select a specific *Project.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Task Status	This parameter is optional. Click the *Task Status* to be displayed. **Note:** Allows for multiple status selection.

Sized Projects

This portlet displays project usage information, such as actuals, ETC, and total usage, for all projects that have a task in a Sizing Budget project. By default, the portlet displays information from the detailed project plan and from the Sizing Budget task summarized together. A drill-down shows the separate line items for the detailed plan and the Sizing task.

The default sort is by *Leadership Group* and *Project ID.* The *Project ID* column provides a link to the *Project Overview* page. From the *Project Validation* link, click the *Sized Projects* tab and enter the following parameters:

Field Name (Characters)	***Value***
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Master Plan Year	This parameter is required. Browse to select a specific *Master Plan Year.*

Date Renegotiation

This portlet displays information about date renegotiation change requests. The default sort is by *Request Date.* The *Request Date* column provides a link to the *Date Renegotiation* page. The *Project ID* column provides a link to the *Project Overview* page. From the *Project Validation* link, click the *Date Renegotiation* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.*
Project	This parameter is optional. Browse to select a specific *Project.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager*.
Request Date	This parameter is optional. Select a *Start Date* and/or and *End Date* from the date picker. The default *Start Date* is the start of the current fiscal year.
Approval Status	This parameter is optional. Browse to select a specific *Approval Status*.

Allocation Variance

This portlet displays information comparing a project's *Total Usage* within a *Master Plan* period to that project's *Master Plan Allocation*. Only projects that are exceeding their allocation will be displayed on this portlet. Note that the *Total Usage* column shows the project's total usage during the *Master Plan* period. This number will be different from the project's overall total usage when the project spans more than one *Master Plan* (i.e. the project is a carryover).

The default sort is by *Allocation Variance.* The *Project ID* column provides a link to the *Project Overview* page. From the *Project Allocation* link, click the *Allocation Variance* tab and enter the following parameters:

Field Name (Characters)	***Value***
OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS.
Master Plan Start Date	This parameter is required. The default value is the current *Master Plan Start Date.*
Project	This parameter is optional. Browse to select a specific *Project.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager.*

Program Allocation

This portlet displays summarized information comparing a program's *Total Usage* within a *Master Plan* period to that project's *Master Plan Allocation*. A drill-down shows the detail for each project in the program. By default, all programs in the current *Master Plan* are displayed on this portlet. Note that the *Total Usage* column shows the project's total usage during the *Master Plan* period. This number will be different from the project's overall total usage when the project spans more than one *Master Plan* (i.e. the project is a carryover).

The default sort for this portlet is by *Leadership Group* and *Priority.* The *Project ID* column provides a link to the *Project Overview* page. From the *Project Allocation* link, click the *Program Allocation* tab and enter the following parameters:

Field Name (Characters)	***Value***
Master Plan Start Date	This parameter is required. The default value is the current *Master Plan Start Date.*
Master Plan End Date	This parameter is required. The default value is the current *Master Plan End Date.*
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Master Plan Type	This parameter is required. Browse to select a specific *Master Plan Type.* The default value is *Enhancements and New Development.*
Master Plan Year	This parameter is required. Browse to select a specific *Master Plan Year.* The default value is the current *Master Plan Year (e.g. 2009-2010).*

Rollover Projects

This portlet displays information about *Carryover Projects.* A *Carryover Project* is a project that is not scheduled to complete during the current *Master Plan,* and will therefore need hours allocated in the next *Master Plan. Carryover Projects* are identified by looking for ETC scheduled past the current *Master Plan End Date.*

The default sort for this portlet is by *Project ID.* The *Project ID* column provides a link to the *Project Overview* page. From the *Project Allocation* link, click the *Rollover Projects* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project	This parameter is optional. Browse to select a specific *Project.*
Project Manager	This parameter is optional. Browse to select a specific *Project Manager.*
Leadership Group	This parameter is optional. Browse to selects a specific *Leadership Group.*
OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS.
Master Plan End Date	This parameter is required. The default value is the current *Master Plan End Date.*

Allocation Increase

This portlet displays projects and programs that have had allocation increases, i.e. the *Current Allocation* is more than the *Original Allocation*. By default, all projects and programs in the current *Master Plan* are displayed on this portlet.

The default sort for this portlet is by *Leadership Group* and *Priority.* The *Project ID* column provides a link to the *Project Overview* page. From the *Project Allocation* link, click the *Allocation Increase* tab and enter the following parameters:

Field Name (Characters)	***Value***
Master Plan Start Date	This parameter is required. The default value is the current *Master Plan Start Date.*
Master Plan End Date	This parameter is required. The default value is the current *Master Plan End Date.*
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Master Plan Type	This parameter is required. Browse to select a specific *Master Plan Type.* The default value is *Enhancements and New Development.*
Master Plan Year	This parameter is required. Browse to select a specific *Master Plan Year.* The default value is the current *Master Plan Year (e.g. 2009-2010).*

TSN Prioritization

This portlet displays the Technical Systems and Network priority for all development projects. Projects submitted for approval are added to the list prior to the Steering Committee Meeting and prioritized as part of the project approval process. The default sort is by *TSN Priority*. There are no parameters required to run this report.

Master Plan Activity

This portlet displays information about the projects on the Master Plan. The default sort for this portlet is by *Leadership Group* and *Priority.* The *Project ID* column provides a link to the *Project Overview* page. From the *Executive Reporting* menu, click the *Portfolio Dashboard* link and enter the following parameters:

Field Name (Characters)	***Value***
Leadership Group Program?	This parameter is optional. Select *Yes* to show only information summarized by Leadership Group. Select *No* to show only project-level information. Select *All* to show both. The default value is *No*.
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Master Plan Type	This parameter is required. Browse to select a specific *Master Plan Type.* The default value is *Enhancements and New Development.*
Master Plan Year	This parameter is required. Browse to select a specific *Master Plan Year.* The default value is the current *Master Plan Year (e.g. 2009-2010).*

IT Strategic Plan Mapping

This portlet displays both detailed and summary information about projects aligning with the Information Technology Strategies and Initiatives. The default sort for the detailed section of the portlet is by *Leadership Group* and *Priority.* The *Project ID* column provides a link to the *Project Overview* page. From the *Executive Reporting* menu, click the *Strategic Plan Mapping* link and enter the following parameters:

Field Name (Characters)	***Value***
Master Plan Type	This parameter is required. Browse to select a specific *Master Plan Type.* The default value is *Enhancements and New Development.*
Master Plan Year	This parameter is required. Browse to select a specific *Master Plan Year.* The default value is the current *Master Plan Year.*
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Project	This parameter is optional. Browse to select a specific *Project.*

Resource Management

Unfilled Roles

This portlet displays information about work assigned to generic Roles, broken out by Master Plan quarter. From the *Resource Management* menu, click the *Resource Planning* link. Select the *Unfilled Roles* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project OBS	This parameter is optional. Browse to select a specific *Project OBS* (for example, IT Functional Organization Projects).
Project OBS – Filter Mode	This parameter is optional. If a Project OBS is entered, it is recommended to select *Unit and Descendants.*
Resource OBS	This parameter is optional. Browse to select a specific node in the *IT Resource Pool.* The default value is the top-level *IT Resource Pool.*
Resource OBS – Filter Mode	This parameter is optional. It is recommended to leave it as the default value of *Unit and Descendants.*
ETC Range	This parameter is used to show only assignments with ETC in a certain range. By default, the range is 1 – 100,000 hours. By using this default value, assignments with ETC = 0 are automatically filtered out.
Role	This parameter is optional. Browse to select a specific *Role.*
Approved	The default value for this parameter is *Yes,* which shows only the projects that are 'above the line' on the Master Plan. Setting Approved = *No* will show only Open Requests.

Role Demand

This page displays two portlets: **Role Capacity vs Demand** and **Roles Without Team OBS**. **Role Capacity vs Demand** shows the availability (capacity) of all active resources compared to the Estimate to Complete (demand) on both active resources and generic roles, broken out by role. **Roles without Team OBS** is an exception portlet. It shows all generic roles assigned to projects but not assigned to the Team OBS on that project, or with a missing role on that project. The ETC on this portlet is *not* included in the **Role Capacity vs Demand** portlet. The missing Team OBSs should be corrected immediately. To access these portlets, click the *Resource Planning* link on the *Resource Management* menu, select the *Role Demand* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS.
Resource OBS	This parameter is required. Browse to select a specific resource *OBS.* The default value is the *IT Resource Pool.* Drill down to select a specific Division or Team.

Start Date	This parameter is required. The default value is the current *Master Plan Start Date.*
Finish Date	This parameter is required. The default value is the current *Master Plan Finish Date.*
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Labor Type	This parameter is optional. Browse to select a specific *Labor Type.*
Stage Identifier	This parameter is optional. The default value is *Analyze*, which includes only approved Master Plan projects and excludes Open Requests.
Role	This parameter is optional. Browse to select a specific *Role.*

Role Demand by Project

Role Demand by Project shows the Estimate to Complete (demand) on both active resources and generic roles, broken out by project. To access this portlet, click the *Resource Planning* link on the *Resource Management* menu, select the *Role Demand by Project* tab and enter the following parameters:

Field Name (Characters)	***Value***
Project OBS	This parameter is required. Browse to select a specific *OBS.* The default value is the current IT Functional OBS*.*
Resource OBS	This parameter is required. Browse to select a specific resource *OBS.* The default value is the *IT Resource Pool.* Drill down to select a specific Division or Team.
Start Date	This parameter is required. The default value is the current *Master Plan Start Date.*
Finish Date	This parameter is required. The default value is the current *Master Plan Finish Date.*
Project	This parameter is optional. Browse to select a specific *Project.*
Leadership Group	This parameter is optional. Browse to select a specific *Leadership Group.*
Labor Type	This parameter is optional. Browse to select a specific *Labor Type.*
Stage Identifier	This parameter is optional. The default value is *Analyze*, which includes only approved Master Plan projects and excludes Open Requests.
Role	This parameter is optional. Browse to select specific *Roles.*

Workloads

This portlet displays information about Resource Availability, Allocations, and Assignments. The default sort for this portlet is by *Resource. The Resource* column provides a link to the *Resource-Labor-Main-General* page. All fields in the *Monthly Allocation* columns provide a link to the *Resource/Role Allocations Detail* page.

From the *Resource Management* menu, click the *Resource Planning* link. Select the *Workloads* tab and enter the following parameters:

Field Name (Characters)	***Value***
Resource Name	This parameter is optional. Browse to select a specific *Resource* by name.
Resource ID	This parameter is optional. Browse to select a specific *Resource* by ID.
Resource OBS	This parameter is optional. Browse to select a specific node in the *IT Resource Pool.* The default value is the top-level *IT Resource Pool.*
Resource OBS – Filter Mode	This parameter is optional. It is recommended to leave it as the default value of *Unit and Descendants.*
Resource Type	This parameter is optional. It is recommended to leave it as the default value of *Labor.*
Employment	This parameter is optional. Browse to select a specific *Employment Type.*
Project OBS	This parameter is optional. Browse to select a specific *Project OBS* (for example, IT Functional Organization Projects).
Project OBS – Filter Mode	This parameter is optional. If a Project OBS is entered, it is recommended to select *Unit and Descendants.*
Approved	This parameter is optional. Browse to select a specific *Approved Status.*
Booking Status	This parameter is optional. Browse to select a specific *Booking Status.*
Over Allocation %	This parameter is optional. Enter an *Over-Allocation %* to display only resources that are overallocated.

<u>Allocation Detail</u>

This portlet displays detailed information about a specific Resource's Availability, Allocations, and Assignments per project. The default sort for this portlet is by *Project. The Project* column provides a link to the *Project-Team-Staff* page. From the *Resource Workloads* portlet, click any field in the *Monthly Allocation* section and enter the following parameters:

Field Name (Characters)	***Value***
Investment Name	This parameter is optional. Browse to select a specific *Investment (Project)* by name.
Investment ID	This parameter is optional. Browse to select a specific *Investment (Project)* by ID.
Investment OBS	This parameter is optional. Browse to select a specific *Investment (Project) OBS* (for example, IT Functional Organization Projects).

Field Name (Characters)	***Value***
Investment OBS – Filter Mode	This parameter is optional. If a Project OBS is entered, it is recommended to select *Unit and Descendants.*
Investment Role	This parameter is optional. Browse to select only projects where the resource is filling a particular *Role.*
Approved	This parameter is optional. Browse to select a specific *Approved Status.*
Investment	This parameter is optional. Browse to select a specific *Investment (Project)*
Active	This parameter is optional. Browse to select a particular *Investment (Project) Active Status*
Booking Status	This parameter is optional. Browse to select a specific *Booking Status.*
Open for Time	This parameter is optional. Select to display only projects that are open/not open for time entry.

<u>Weekly Detail</u>

This portlet displays information about resource assignment to projects timescaled to a weekly basis. The default sort for this portlet is by *Resource. The Resource* column provides a link to the *Resource-Labor-Main-General* page. All fields in the *Weekly Allocation* columns provide a link to the *Resource/Role Allocations Detail* page. From the *Resource Management* menu, click the *Resource Planning* link. Select the *Weekly Detail* tab and enter the following parameters:

Field Name (Characters)	***Value***
Resource Name	This parameter is optional. Browse to select a specific *Resource* by name.
Resource OBS	This parameter is optional. Browse to select a specific node in the *IT Resource Pool.* The default value is the top-level *IT Resource Pool.*
Resource OBS – Filter Mode	This parameter is optional. It is recommended to leave it as the default value of *Unit and Descendants.*
Resource Type	This parameter is optional. It is recommended to leave it as the default value of *Labor.*
Booking Status	This parameter is optional. Browse to select a specific *Booking Status.*
Project	This parameter is optional. Browse to select a specific *Project* by name.
Project OBS	This parameter is optional. Browse to select a specific *Project OBS* (for example, IT Functional Organization Projects).
Project OBS – Filter Mode	This parameter is optional. If a Project OBS is entered, it is recommended to select *Unit and Descendants.*

Field Name (Characters)	***Value***
Project Manager	This parameter is optional. Browse to select a specific *Project Manager* by name.
Approved	This parameter is optional. Browse to select a specific *Approved Status.*

Capacity Graph

This portlet displays information about Resource Availability, Allocations, and Assignments in a graphical format. From the *Resource Management* menu, click the *Resource Planning* link. Select the *Capacity Graph* tab and enter the following parameters:

Field Name (Characters)	***Value***
Start Date	Defaults to the beginning of the previous month.
Finish Date	Defaults to the end of the next quarter.
Timeframe	Defaults to *Monthly.*
Resource OBS	This parameter is optional. Browse to select a specific node in the *IT Resource Pool.* The default value is the top-level *IT Resource Pool.*
Resource OBS – Filter Mode	This parameter is optional. It is recommended to leave it as the default value of *Unit and Descendants.*
Resource	This parameter is optional. Browse to select a specific *Resource* by name.
Resource Manager	This parameter is optional. Browse to select a specific *Resource Manager.*
Role	This parameter is optional. Browse to select a specific *Role.*
Employee Type	This parameter is optional. Browse to select a specific *Employee Type.*
Active	This parameter is optional. Select to include only Active/Inactive resources.