

# Clarizen PPR (Periodic Project Report) Application Guide



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1. The PPR (Periodic Project Report) provides project highlights in Word or PDF document:



## PERIODIC PROJECT REPORT

( 10.10.14 - 01.05.15 )


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**Project Name:** Robbie Williams in Concert

<b>ID</b>	P-11202	<b>% Complete</b>	6.54 %	<b>Expected Progress</b>	9.41 %
<b>Project Manager</b>	Limor Schmitz	<b>Project Phase</b>	Analysis		
<b>Schedule Status</b>	At Risk	<b>Budget Status</b>	On Track		
<b>Project Start Date</b>	01.10.14	<b>Project Due Date</b>	02.05.15		

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ROADMAP




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MILESTONES

Milestone Name	ID	Status	Start Date	Due Date	Duration	Work	% Complete	Resource
Sign Deal	M-2502	●	01.10.14	07.11.14	28 Days	22 Days	100.00 %	
Venue & Date	M-2501	●	06.10.14	10.11.14	26 Days	25 Days	40.00 %	
Travel & Accomodation	M-2504	●	05.02.15	01.04.15	40 Days	80 Days	0.00 %	
Marketing & Promotion	M-2505	●	11.11.14	27.04.15	120 Days	280 Days	0.00 %	
Stage Equipment Logistics	M-2503	●	03.02.15	27.04.15	60 Days	80 Days	0.00 %	
Concert	M-2506	●	01.05.15	02.05.15	2 Days	2 Days	0.00 %	

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COMPLETED TASKS (within above defined period)

Task Name	ID	State	Start Date	Due Date	Actual End Date	Work	Actual Effort	Resource
Negotiations with band manager	T-09403	●	01.10.14	31.10.14	10.11.14	12 Days	12 Days	
Schedule suitable date within band's tour calendar	T-09402	●	06.10.14	31.10.14	10.11.14	10 Days	10 Days	

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ACTIVE TASKS (within above defined period)

Task Name	ID	Status	Start Date	Due Date	Duration	Work	% Complete	Resource
Sign agreement with band	T-09404	●	27.10.14	07.11.14	10 Days	10 Days	100.00 %	
Negotiations with venue manager	T-09401	●	21.10.14	10.11.14	15 Days	15 Days	0.00 %	
Merchandise	T-09412	●	11.11.14	05.01.15	2 Months	40 Days	0.00 %	
Shipment	T-09405	●	03.02.15	16.03.15	30 Days	30 Days	0.00 %	
Transportation to site	T-09406	●	17.03.15	23.03.15	5 Days	5 Days	0.00 %	
Receive entry permits from authorities	T-09408	●	05.02.15	01.04.15	2 Months	40 Days	0.00 %	
Negotiate accomodation with hotel	T-09409	●	08.02.15	01.04.15	2 Months	40 Days	0.00 %	
TV Promotions	T-09411	●	11.11.14	27.04.15	6 Months	120 Days	0.00 %	
Ticket Sales	T-09410	●	11.11.14	27.04.15	6 Months	120 Days	0.00 %	
Installation	T-09407	●	24.02.15	27.04.15	45 Days	45 Days	0.00 %	
Sound Check	T-09413	●	01.05.15	01.05.15	1 Days	1 Days	0.00 %	

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ALL TASKS at risk or off track

Task Name	ID	Status	Start Date	Due Date	Duration	Work	% Complete	Resource
Sign agreement with band	T-09404	●	27.10.14	07.11.14	10 Days	10 Days	100.00 %	
Negotiations with venue manager	T-09401	●	21.10.14	10.11.14	15 Days	15 Days	0.00 %	

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PROJECT RISKS

Risk Name	ID	State	Description	P	I	RR	Contingency Plan	Importanz	% Complete	Due Date	Assigned To
Risk #1	R-0901	Submitted	Risk #1 Description	2	4	8		Medium	6.54 %	09.11.14	Limor Schmitz
Risk #2	R-0902	Submitted	Risk #2 Description	1	2	2		Medium	6.54 %	30.11.14	Limor Schmitz

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PROJECT REQUESTS

Request Name	ID	State	Description	Importanz	% Complete	Due Date	Assigned To
Request #1	CR-1301	Submitted	Request #1 Description	Medium	6.54 %	04.01.15	Limor Schmitz
Request #2	CR-1302	Submitted	Request #2 Description	Medium	6.54 %	08.02.15	Limor Schmitz
Request #3	CR-1303	Submitted	Request #3 Description	Medium	6.54 %	22.02.15	Limor Schmitz
Request #4	CR-1304	Submitted	Request #4 Description	Medium	6.54 %	01.03.15	Limor Schmitz

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PROJECT ISSUES

Issue Name	ID	State	Description	Importanz	% Complete	Due Date	Assigned To
Issue #1	I-1001	Submitted	Issue #1 Description	Medium	6.54 %	26.11.14	Limor Schmitz

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PROJECT BUGS

Bug Name	ID	State	Description	Importanz	% Complete	Due Date	Assigned To
Bug #1	B-601	Submitted	Bug #1 Description	Medium	6.54 %	31.12.14	Limor Schmitz
Bug #2	B-602	Submitted	Bug #2 Description	Medium	6.54 %	14.01.15	Limor Schmitz


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TIME ENTRIES

User	From Date	To Date	Total Reported Hours
Shiri Bar	18.06.14	20.06.14	5.5 Hours
Merav Knafou	16.06.14	19.06.14	10.25 Hours
Itzik Dahan	16.06.14	19.06.14	16 Hours
	16.06.14	20.06.14	31.75 Hours

2. It provides in one document all the crucial information on your project and presents by various chapters:







**General Project Information:**

<b>Project Name:</b> Robbie Williams in Concert			
	<b>ID</b> P-11202	<b>% Complete</b> 6.54 %	<b>Expected Progress</b> 9.41 %
	<b>Project Manager</b> Limor Schmitz	<b>Project Phase</b> Analysis	
	<b>Schedule Status</b> <span style="color: orange;">●</span> At Risk	<b>Budget Status</b> <span style="color: green;">●</span> On Track	
	<b>Project Start Date</b> 01.10.14	<b>Project Due Date</b> 02.05.15	

**Roadmap** – provides an image view of your project roadmap widget, visualizing the project status and pin pointing the milestones within the project schedule





**Milestones** – this section lists all project milestones (sorted by due date) and provides their status & additional information.

MILESTONES									
Milestone Name	ID	Status	Start Date	Due Date	Duration	Work	% Complete	Resource	
 Sign Deal	M-2502	<span style="color: red;">●</span>	01.10.14	07.11.14	28 Days	22 Days	100.00 %		
 Venue & Date	M-2501	<span style="color: orange;">●</span>	06.10.14	10.11.14	26 Days	25 Days	40.00 %		
 Travel & Accomodation	M-2504	<span style="color: green;">●</span>	05.02.15	01.04.15	40 Days	80 Days	0.00 %		
 Marketing & Promotion	M-2505	<span style="color: green;">●</span>	11.11.14	27.04.15	120 Days	280 Days	0.00 %		
 Stage Equipment Logistics	M-2503	<span style="color: green;">●</span>	03.02.15	27.04.15	60 Days	80 Days	0.00 %		
 Concert	M-2506	<span style="color: green;">●</span>	01.05.15	02.05.15	2 Days	2 Days	0.00 %		

Sorting is indicated by green ↓

**Completed Tasks** – this section lists all project tasks that have been completed from the indicated report start date onwards (based on the actual end date):

PERIODIC PROJECT REPORT									
( 10.10.14 - 01.05.15 )									
COMPLETED TASKS (within above defined period)									
Task Name	ID	State	Start Date	Due Date	Actual End Date	Work	Actual Effort	Resource	
Negotiations with band manager	T-09403		01.10.14	31.10.14	10.11.14	12 Days	12 Days		
Schedule suitable date within band's tour calendar	T-09402		06.10.14	31.10.14	10.11.14	10 Days	10 Days		

Sorting is indicated by green ↓

**Active Tasks** – this section lists all project tasks that are active and have a due date until the indicated report end date:

**PERIODIC PROJECT REPORT**  
( 10.10.14 - 01.05.15 )

ACTIVE TASKS (within above defined period)									
Task Name	ID	Status	Start Date	Due Date	Duration	Work	% Complete	Resource	
Sign agreement with band	T-09404	●	27.10.14	07.11.14	10 Days	10 Days	100.00 %		
Negotiations with venue manager	T-09401	●	21.10.14	10.11.14	15 Days	15 Days	0.00 %		
Merchandise	T-09412	●	11.11.14	05.01.15	2 Months	40 Days	0.00 %		
Shipment	T-09405	●	03.02.15	16.03.15	30 Days	30 Days	0.00 %		
Transportation to site	T-09406	●	17.03.15	23.03.15	5 Days	5 Days	0.00 %		
Receive entry permits from authorities	T-09408	●	05.02.15	01.04.15	2 Months	40 Days	0.00 %		
Negotiate accomodation with hotel	T-09409	●	05.02.15	01.04.15	2 Months	40 Days	0.00 %		
TV Promotions	T-09411	●	11.11.14	27.04.15	6 Months	120 Days	0.00 %		
Ticket Sales	T-09410	●	11.11.14	27.04.15	6 Months	120 Days	0.00 %		
Installation	T-09407	●	24.02.15	27.04.15	45 Days	45 Days	0.00 %		
Sound Check	T-09413	●	01.05.15	01.05.15	1 Days	1 Days	0.00 %		

Sorting is indicated by green ↓

**All Tasks at risk or off track** – this section lists all active project tasks that are at risk or off track:

ALL TASKS at risk or off track								
Task Name	ID	Status	Start Date	Due Date	Duration	Work	% Complete	Resource
Sign agreement with band	T-09404	●	27.10.14	07.11.14	10 Days	10 Days	100.00 %	
Negotiations with venue manager	T-09401	●	21.10.14	10.11.14	15 Days	15 Days	0.00 %	

Sorting is indicated by green ↓

**Project Risks** – this section lists all risks associated to the project, which are in status *opened*, *reopened*, *submitted* or *in work* and make reference to *Probability*, *Impact*, *Risk Rate* and *Contingency Plan* (if indicated):

PROJECT RISKS											
Risk Name	ID	State	Description	P	I	RR	Contingency Plan	Importance	% Complete	Due Date	Assigned To
Risk #1	R-0901	Submitted	Risk #1 Description	2	4	8		Medium	6.54 %	09.11.14	Limor Schmitz
Risk #2	R-0902	Submitted	Risk #2 Description	1	2	2		Medium	6.54 %	30.11.14	Limor Schmitz

P=Probability / I=Impact/ RR=Risk Rate

**Project Requests** – this section lists all requests associated to the project, which are in status *new request, opened, reopened, submitted or in work*:




PROJECT REQUESTS							
Request Name	ID	State	Description	Importance	% Complete	Due Date	Assigned To
Request #1	CR-1301	Submitted	Request #1 Description	Medium	6.54 %	04.01.15	Limor Schmitz
Request #2	CR-1302	Submitted	Request #2 Description	Medium	6.54 %	08.02.15	Limor Schmitz
Request #3	CR-1303	Submitted	Request #3 Description	Medium	6.54 %	22.02.15	Limor Schmitz
Request #4	CR-1304	Submitted	Request #4 Description	Medium	6.54 %	01.03.15	Limor Schmitz

**Project Issues / Bugs** – list all issues and bugs associated to the project, which are in status *opened, reopened, submitted or in work*:

PROJECT ISSUES							
Issue Name	ID	State	Description	Importance	% Complete	Due Date	Assigned To
Issue #1	I-1001	Submitted	Issue #1 Description	Medium	6.54 %	26.11.14	Limor Schmitz

PROJECT BUGS							
Bug Name	ID	State	Description	Importance	% Complete	Due Date	Assigned To
Bug #1	B-601	Submitted	Bug #1 Description	Medium	6.54 %	31.12.14	Limor Schmitz
Bug #2	B-602	Submitted	Bug #2 Description	Medium	6.54 %	14.01.15	Limor Schmitz

**Time Entries** – this section lists all timesheet entries on the overall project, summarizing the total hours per user and providing a grand total:

TIME ENTRIES			
User	From Date	To Date	Total Reported Hours
 Shiri Bar	18.06.14	20.06.14	5.5 Hours
 Merav Knafou	16.06.14	19.06.14	10.25 Hours
 Itzik Dahan	16.06.14	19.06.14	16 Hours
	16.06.14	20.06.14	31.75 Hours

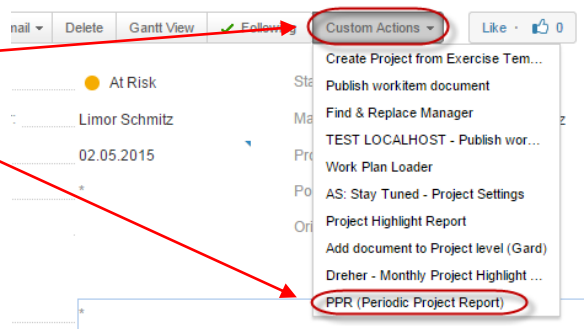
1. To install the PPR application, copy the following URL into your current Clarizen browser: <https://app2.clarizen.com/Clarizen/View/Default.aspx?id=6b493e28-64b4-4100-9c3e-6a3d5beaff7e&type=Published+Application&ver=v6>

2. The installation includes

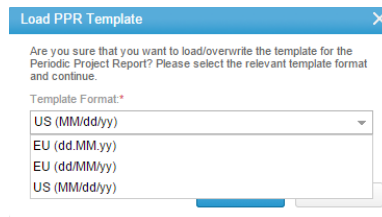
- 2 workflows
- 3 custom actions
- 21 custom fields

3. After installing and activating the PPR application, please

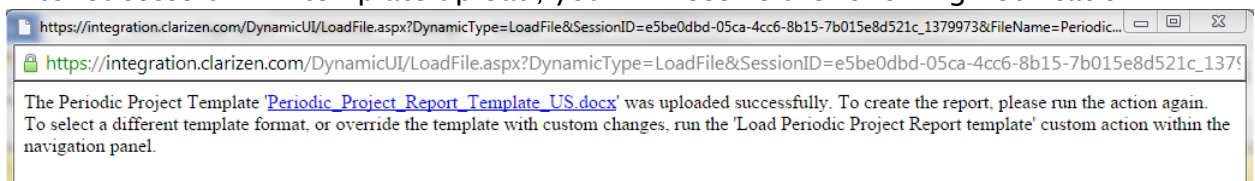
- select/open a project
- go to *Custom Actions*
- run the *PPR (Periodic Project Report)*



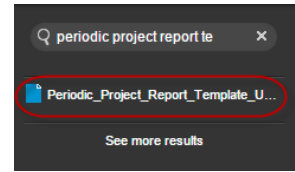
4. You will be prompted to select the PPR Template format. This template will impact the date format (UK, German, US format) displayed in your PPR. Select the relevant template and click *Next*.



5. After successful PPR template upload, you will receive the following notification:



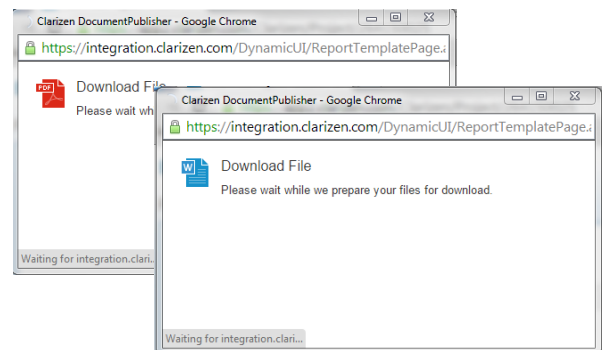
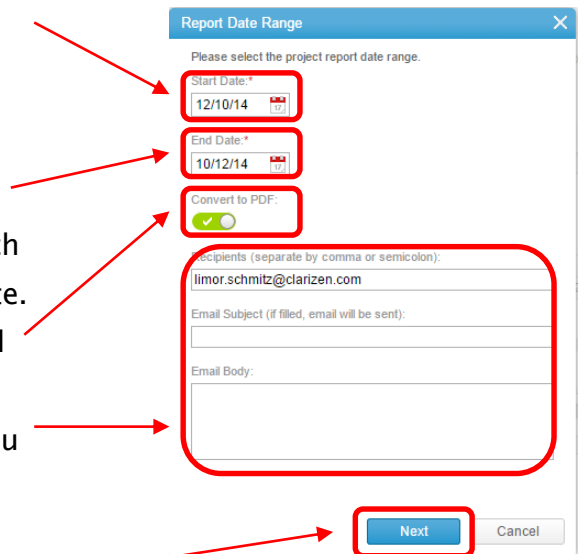
6. The template is now stored on your account and can be found in the Search of the Navigation Panel under “Periodic Project Report Template”



The template upload is a one-time-action and will not be repeated each time you run the custom action.

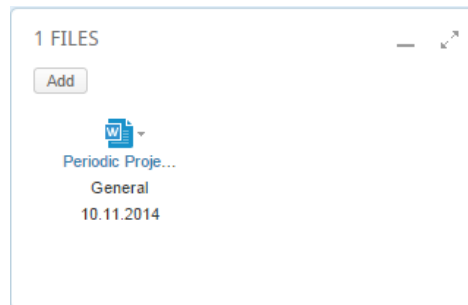
7. Run the **PPR (Periodic Project Report)** custom action again. The following pop-up appears:

- **Start Date** – this date impacts the display of Completed Tasks. The PPR will display tasks which have been completed from this day onwards
- **End Date** – this date impacts the display of Active Tasks. The PPR will display tasks which are active and have a due date up to this date.
- **Converts to PDF** – if checked off, the PPR will be generated as a Word document
- **Recipients, Email Subject, Email Body** – if you wish to directly send the PPR via Email, please make sure to add the relevant Recipient mail & fill the Email Subject
- Click **Next**
- The system generates the PPR
  - If you selected PDF format
  - If you selected Word format



8. Once generated,

- The file is opened and may be downloaded
- Clarizen stores the Periodic Project Report as a **file** in your project **Files**:



- Clarizen creates a **post** in your project **Discussions**:

