TIME-PHASED REPORTS

Controlled Availability

Introduction

Time-phased reports let you evaluate trends for both time and budget to improve forecasts. The reports display data by time period, for your teams and team members.

Use the reports to:

- View target vs actual utilization for teams and individual members (planned vs actual work)
- Forecast work, cost and revenue
- Slice and dice the data to see what resources are working on

The reports utilize data from the following Clarizen items:

- Project and task assignments from the resource link (the user-Work Item link)
- Capacity as defined in user calendars
- Actual work as recorded in timesheets
- Financial metrics for labor based on hours * rates

Notes:

- The data is presented in a daily time resolution, which you can group by weeks, months or quarters.
- Time-phased reports can include data from the beginning of the previous fiscal year until the end of the following fiscal year. For example, if present is July 2018, a report can include data from January 2017 to December 2019 (provided the fiscal year begins in January).
- Staffing requests are currently not included in the reports.

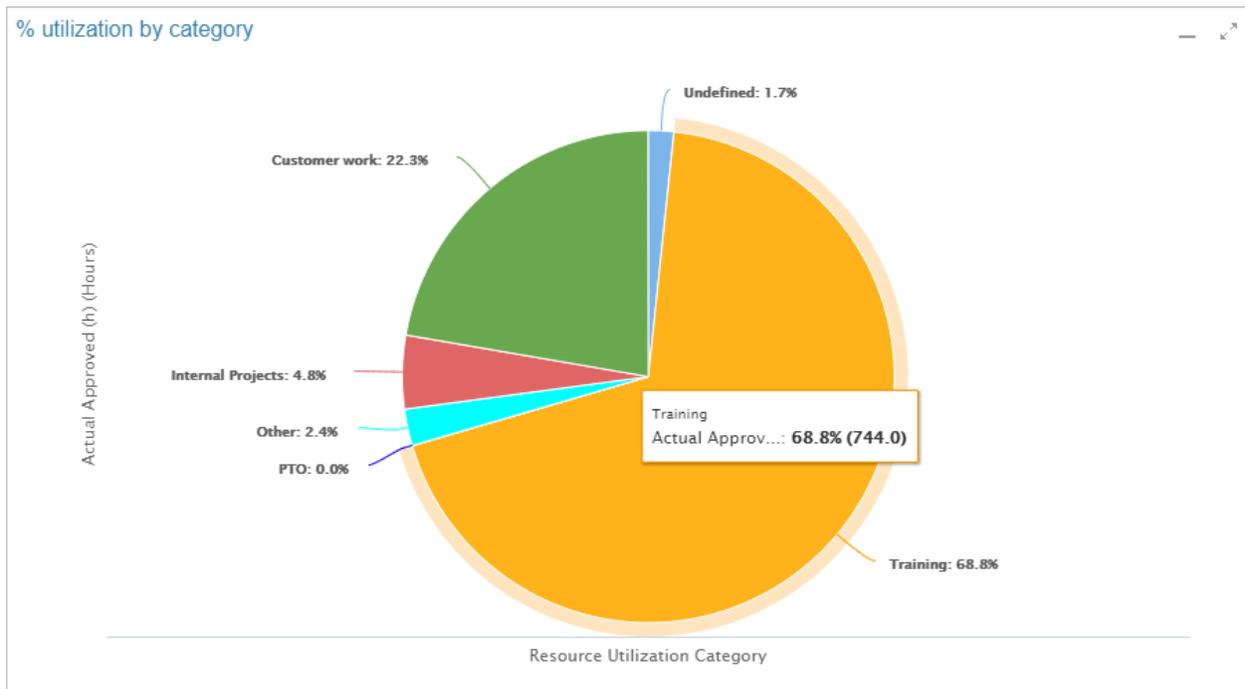*Examples of charts used in Time-phased reports*

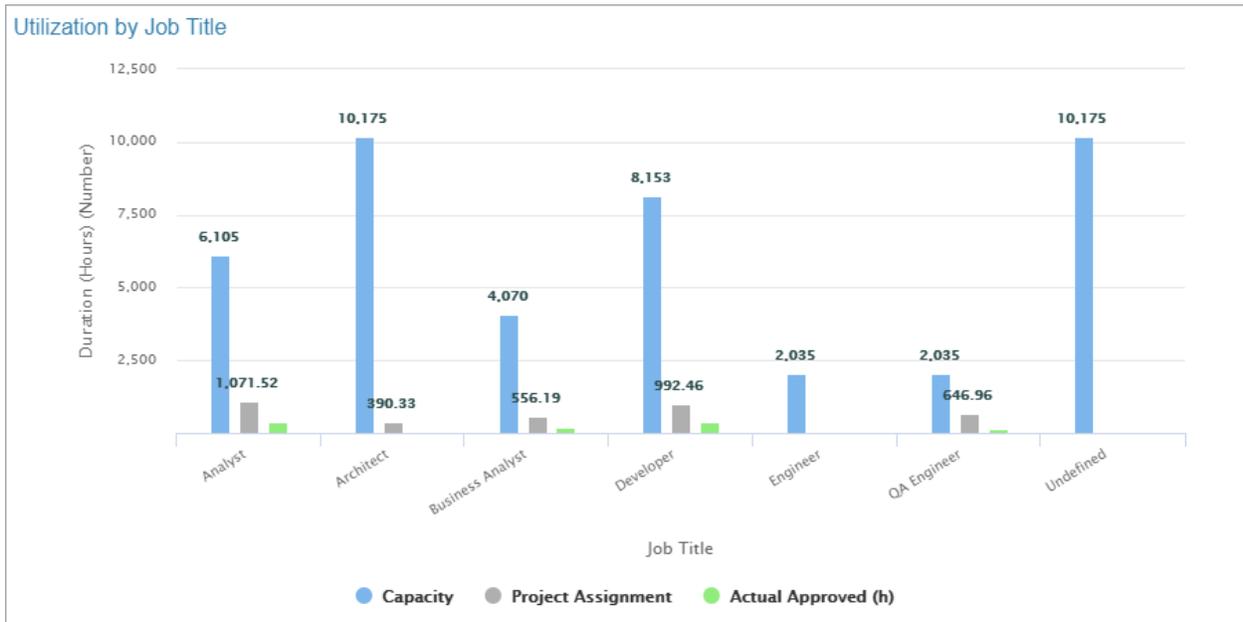View current (to date), past and planned utilization for your team using gauges.
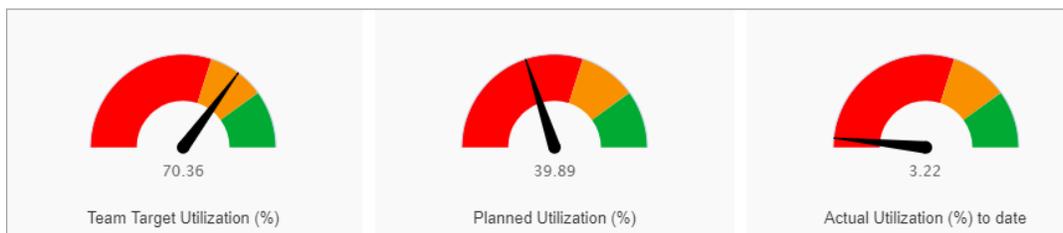
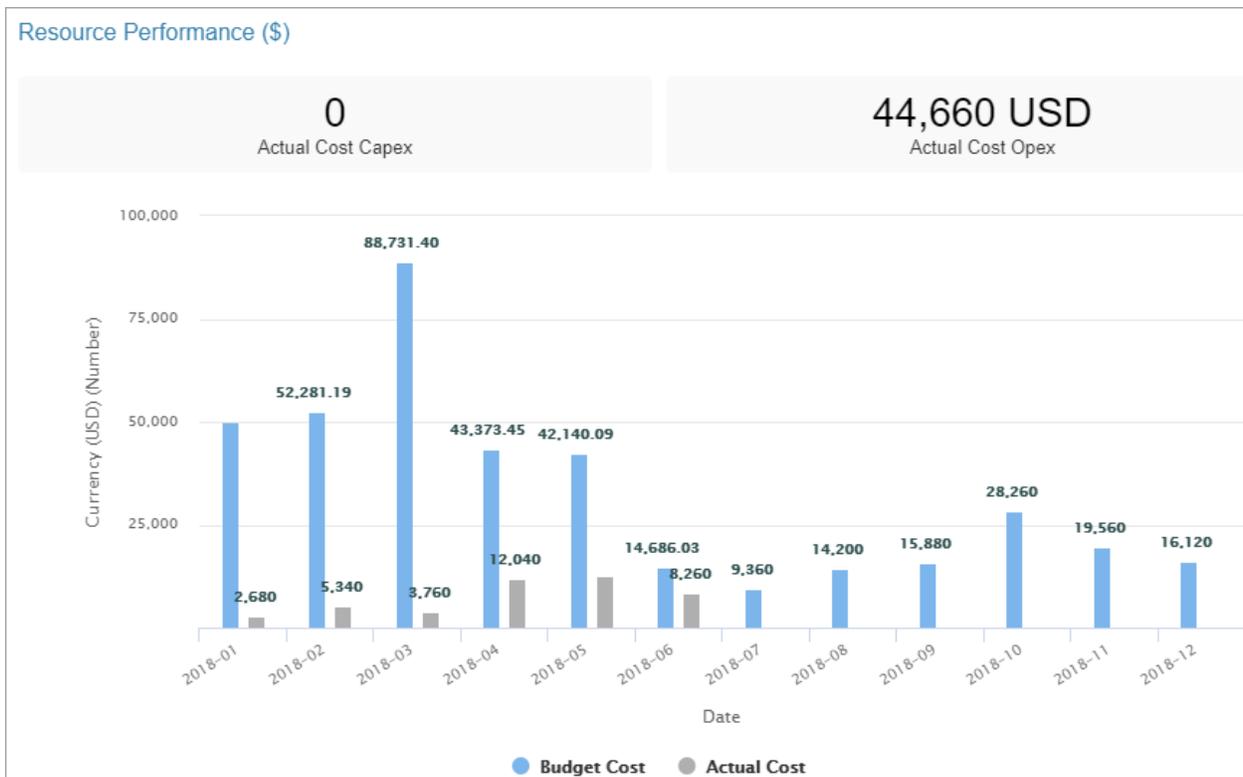View your team's capacity, planned work and actual work in one consolidated view over time.
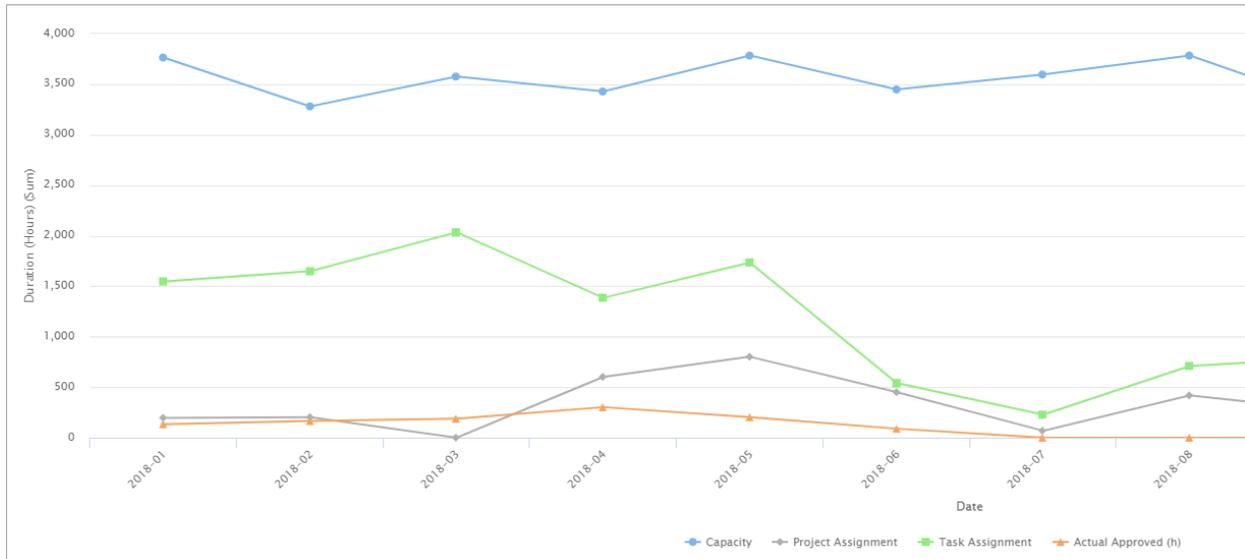
See where your teams are spending their time, based on Work Item categories.

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View your team's utilization by Job Title.

Utilization by Job Title

Capacity · Project Assignment · Actual Approved (h)

Compare the financial performance of your team over time.

Resource Performance ($)

0	44,660 USD
Actual Cost Capex	Actual Cost Opex

Budget Cost · Actual Cost

View individual resource utilization.
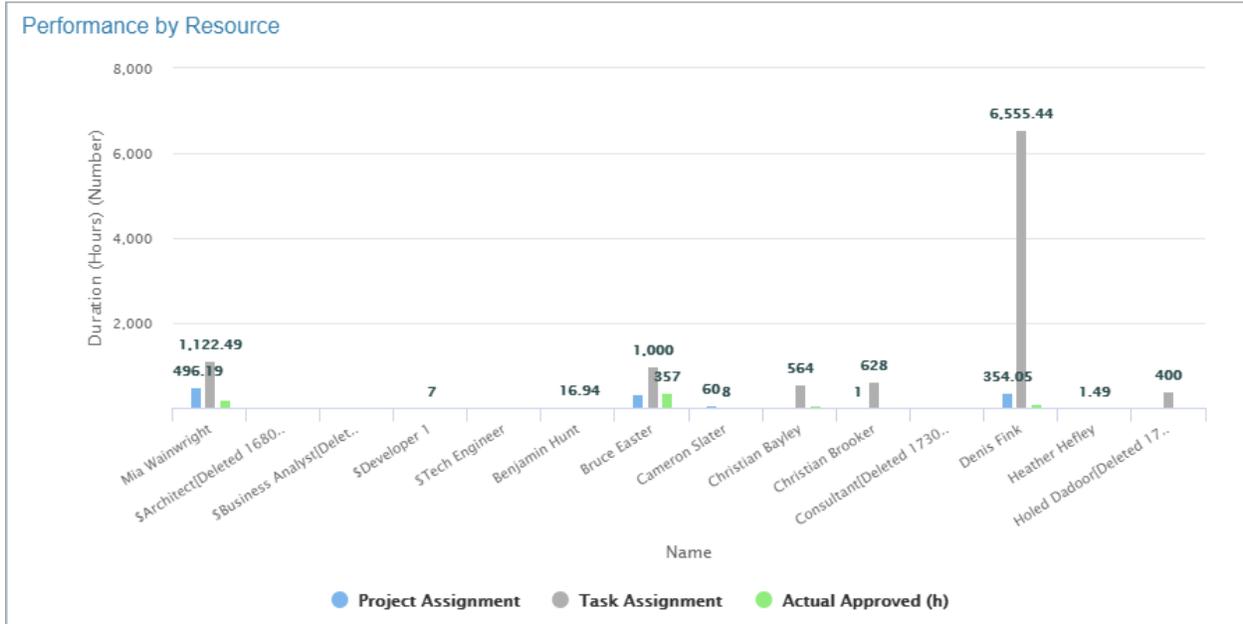
Get a breakdown of your teams' performance with financial and work data (by user groups).

Team Performance ⓘ					
135.13 d Actual Billable Effort		**0 d** Time Entries Pending Approval		**44,660 USD** Actual Cost Billable	
	Actual Approved (h)	Actual Approved Billable (h)	Actual Approved Capex (h)	Actual Approved ...	Actual A.
▸ Groups: Undefined (72)	0 h	0 h	0 h	0 h	0
▸ Groups: Web (24)	251 h	251 h	0 h	0 h	251
▸ Groups: Support (48)	465 h	465 h	0 h	0 h	465
▸ Groups: R&D (36)	214 h	214 h	0 h	0 h	214
▸ Groups: Professional Services (48)	228 h	228 h	0 h	0 h	228
▸ Groups: Mobile (24)	357 h	357 h	0 h	0 h	357
▸ Groups: Group A (24)	465 h	465 h	0 h	0 h	465
▸ Groups: Engineering (120)	641 h	641 h	0 h	0 h	641
▸ Groups: Analyst (60)	322 h	322 h	0 h	0 h	322
▸ Groups: All Company (36)	475 h	475 h	0 h	0 h	475
Totals (21)	1081 h (Sum)	1081 h (Sum)	0 h (Sum)	0 h (Sum)	1081 (Sum

Refreshing the Data

The data is refreshed every night. You can manually refresh all time-phased data (for all reports) once every hour. The refresh process can take some time. When the refresh is complete, you will receive an email to notify you.

To refresh manually, click **Refresh Time Phase Data** in the Reports list.
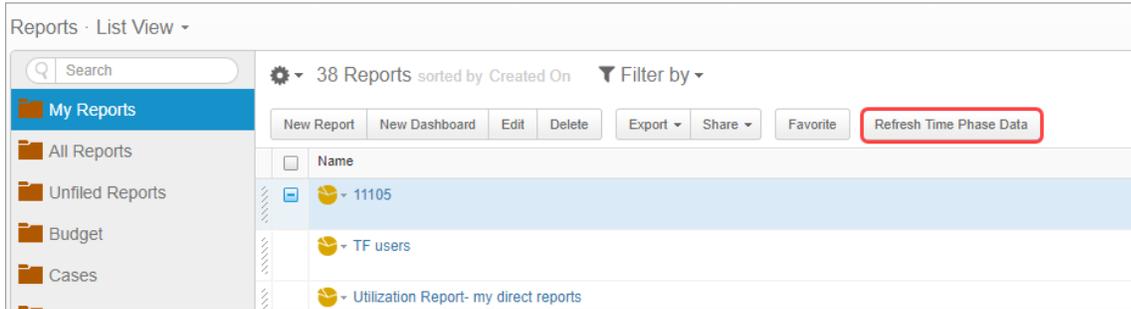
Creating a Time-Phased Report

Build time-phased reports from scratch or use out-of-the-box report templates created by Clarizen (*coming soon*).

The following procedure explains the required additional steps for creating a time-phased report.

To learn more about how to create reports, click here.

To create a time-phased report:

1. Create a new report in Clarizen.
2. Time-phased reports are based on **Time-Phase** attributes:
   a. Time Phase Data - Data based on the resource link (between the user and the Work Item) and timesheets
   b. User Capacity Time Phase - Data based on the user calendar
3. The attributes can be added as related data in the **Report on** options.

In most cases you will want to start with *User* (**Report on**), and then include *Capacity Time Phase Data* followed by *Time Phase Data* as related data. In this case all users will be included, regardless if they have work or not, and only Work Items with assigned users appear in the report.

4. In the Manage section, click Columns and add the required fields to the report.
   To expose and add related data, click the related data category in the pick list.
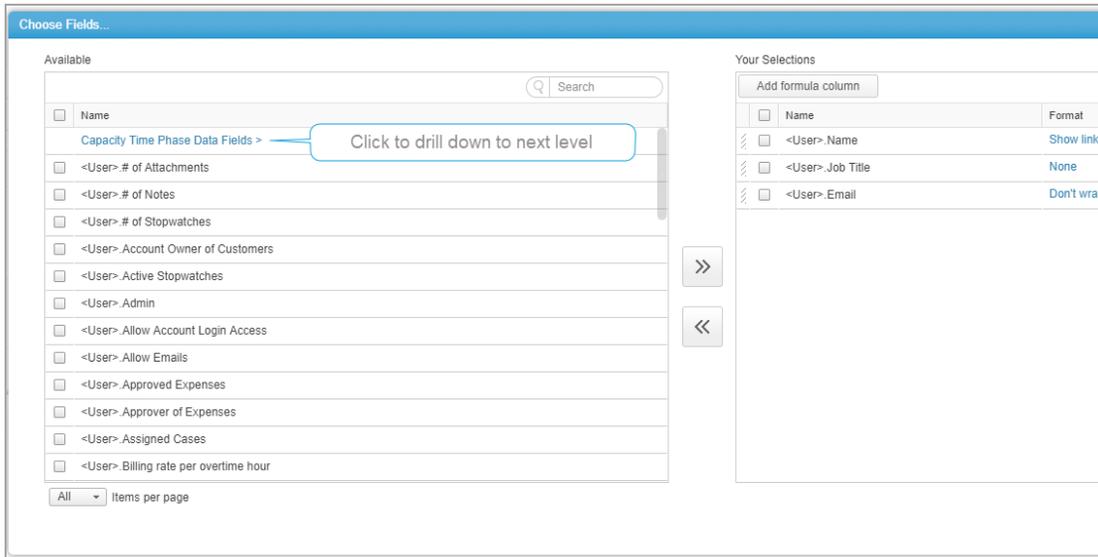
The following diagram shows which fields you can add to the report based on the selected attributes (*Report on* and *related data*).
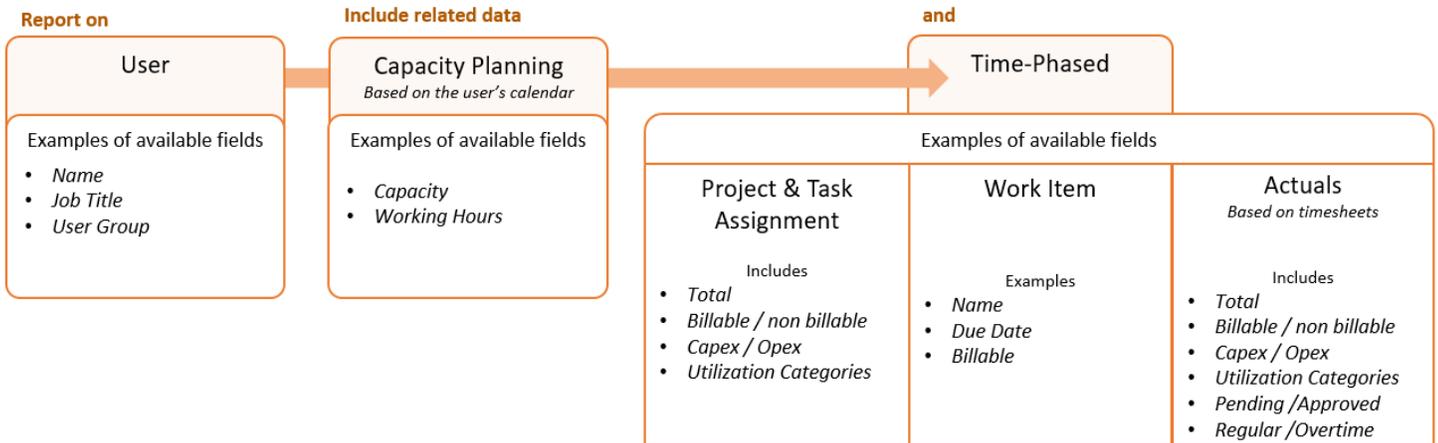
> **Note:** The above example fits most use cases. To see other use case combinations, click here.

5. The rest of the procedure is the same as for other reports, and includes adding charts, using formulas, etc.

Note: When grouping the data table by name, the last grouped date period is **Undefined**. Here you can see the capacity of the user, for days where the user does not have work.

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Example Time-Phased Report

The following procedure describes how to create a report with a line chart that will show us how our team is performing, by comparing their capacity, project and task assignments, and actual work.

1. Create a new report.
2. In the **Report on** options, enter the following options: **User** > **Capacity Time Phase Data** > **Time Phase Data**

This combination should be used whenever you want to see all users, their capacity, their planned work, and their actuals.

3. Click **Add Chart**, and define the chart as follows:
   a. Chart Type: *Line*
   b. X-Axis: Select **User** > **Capacity Time Phase Data** > **Time Phase Data** > *Date*
      Group by *Month*
   c. Y-Axis: Select **Sum** to display the total number of hours
   d. Define the lines in the chart. Select **User** > **Capacity Time-Phased Data** > **Time Phase Data**, and then the related data.
      For the first line, select **Capacity**.
      Select **Multi-dimensional grouping** and repeat the above step to add lines for **Project Assignment**, **Task assignment**, and **Actual approved hours**.

   e. Save and run the report.

4. Customize the related data table. As for all reports, you can choose which columns to include, define grouping, select the format of the column summary, etc.
Group the data first by *User*, and then by *Date*. To add *Date*, select **User** > **Capacity Time Phase Data** > *Date*.
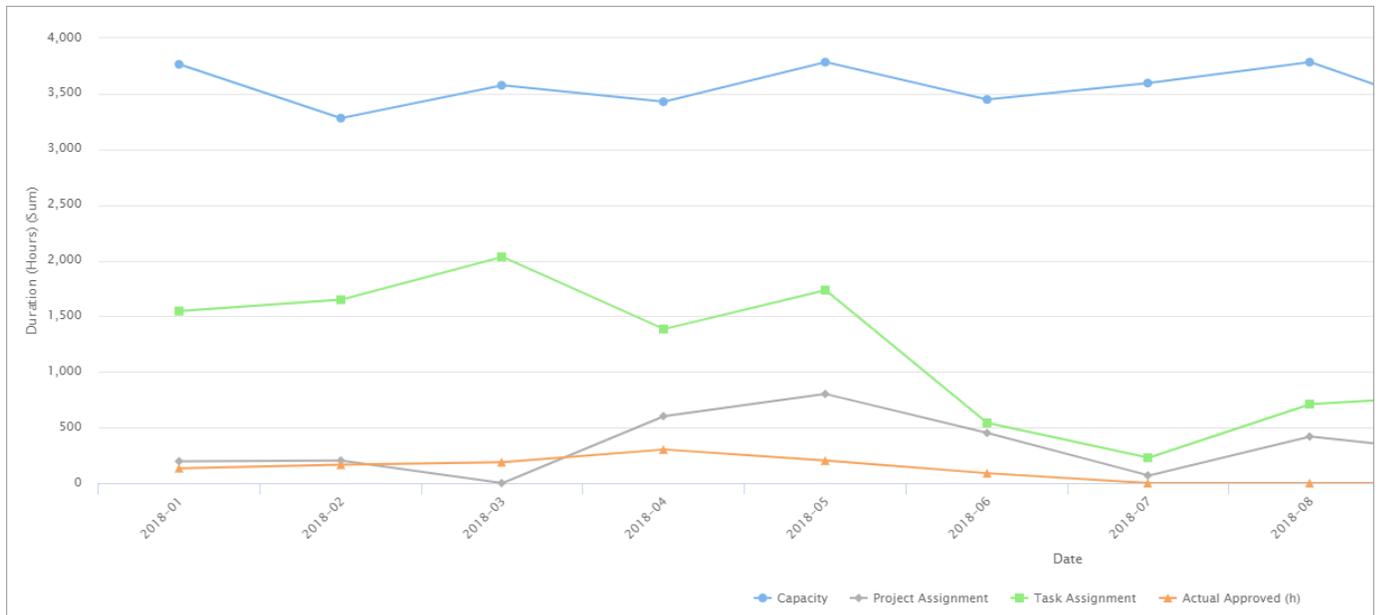

5. Save and run the report.

The line chart

The Data table

Tip: Add some conditional formatting, so that the Project sum displays in red when it's above capacity, and green when less.

	Name	Name	ID	Date	Capacity	Non-Working Exception	Project Assignment	Task Assignment	Actual Approved (h)
▾ Groups: Web (24)					4070 h	0 h	409.09 h	1180.41 h	251 h
▾ Name: Lara Felan (12)					2035 h	0 h	409.09 h	616.41 h	178 h
▾ Date: 2018-12 (1)					163 h	0 h	0 h	0 h	0 h
	🧑 Lara Felan			01-Dec-18	0 h	0 h			
	🧑 Lara Felan			02-Dec-18	0 h	0 h			
	🧑 Lara Felan			03-Dec-18	7 h	0 h			
	🧑 Lara Felan			04-Dec-18	8 h	0 h			
	🧑 Lara Felan			05-Dec-18	8 h	0 h			
	🧑 Lara Felan			06-Dec-18	8 h	0 h			

Best Practices - Utilization Calculations

The following calculations can be set up in Configurations and then used in reports:
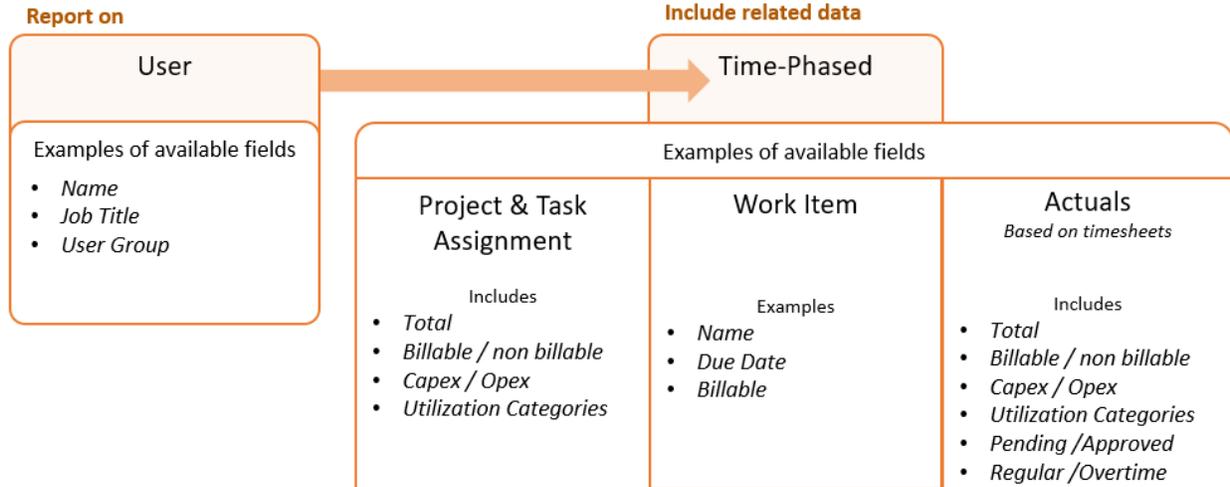
- Planned Project Utilization:
  *If(IsNull($CapacityOfUserDaily.LoadFor.LinkObject.ProjectAssignment),0,($CapacityOfUserDaily.LoadFor.LinkObject.ProjectAssignment/$CapacityOfUserDaily.Capacity)*100)*

- Actual Utilization:
  *If(IsNull($CapacityOfUserDaily.LoadFor.LinkObject.ActualApproved),0,($CapacityOfUserDaily.LoadFor.LinkObject.ActualApproved/$CapacityOfUserDaily.Capacity)*100)*

Additional Use Cases

User > Time Phase Data

Select these attributes when the report is more work focused, without the need for capacity.

Report on

User

Examples of available fields
- *Name*
- *Job Title*
- *User Group*

Include related data

Time-Phased

Examples of available fields

Project & Task Assignment	Work Item	Actuals *Based on timesheets*
Includes	Examples	Includes
• *Total*	• *Name*	• *Total*
• *Billable / non billable*	• *Due Date*	• *Billable / non billable*
• *Capex / Opex*	• *Billable*	• *Capex / Opex*
• *Utilization Categories*		• *Utilization Categories*
		• *Pending /Approved*
		• *Regular /Overtime*

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Work item > Time-Phased Data

Start from *Work Item* when you want to see forecast or planned vs. actual at the project level.

All Work Items are included.

Only users with assigned work appear in the report.
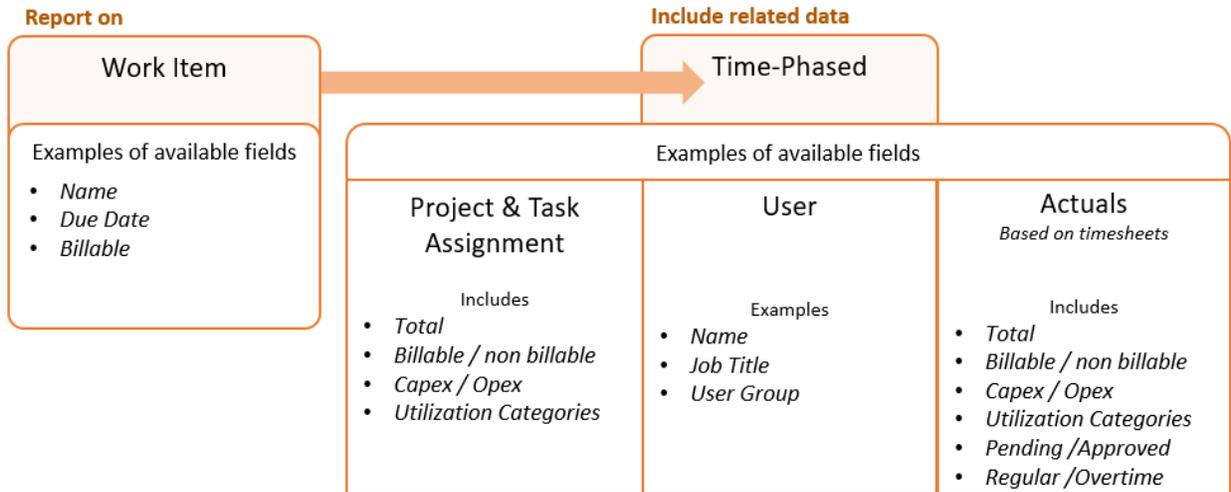
Best Practices

- Formulas - The following calculations can be set up in Configurations and then used in reports:
    - Planned Project Utilization:
      *If(IsNull($CapacityOfUserDaily.LoadFor.LinkObject.ProjectAssignment),0,($CapacityOfUserDaily.LoadFor.LinkObject.ProjectAssignment/$CapacityOfUserDaily.Capacity)*100)*
    - Actual Utilization:
      *If(IsNull($CapacityOfUserDaily.LoadFor.LinkObject.ActualApproved),0,($CapacityOfUserDaily.LoadFor.LinkObject.ActualApproved/$CapacityOfUserDaily.Capacity)*100)*
- Filter users by Resource Manager - Use the Resource Manager filter in reports to filter users by their Resource Manager. In the example below, only users where I am the Resource Manager will appear in the report.