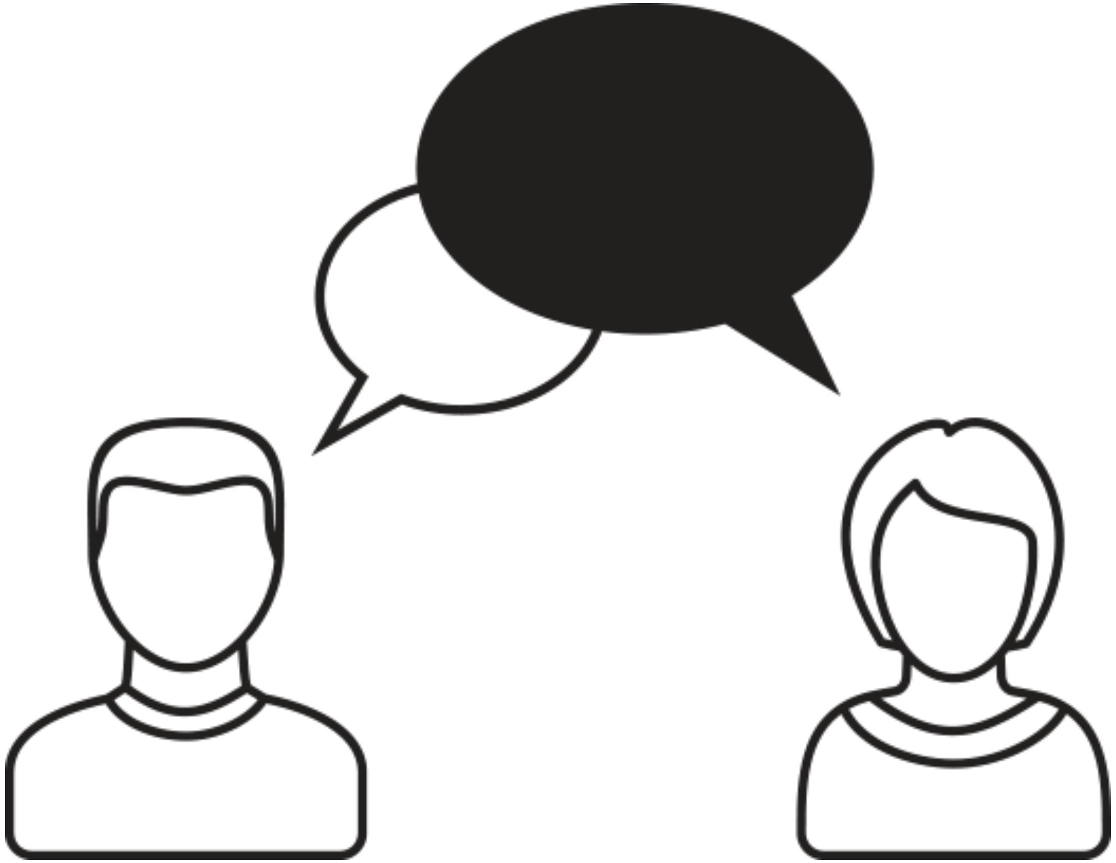
regoUniversity 2017

Administration | Beginner

Your Guide: Chris Shaffer, TBD

Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Introduction
- CA PPM Overview
- Administration Overview
- Resource Setup
- Security Groups
- Ongoing Data Management and Maintenance
- Organizational Breakdown Structures (OBS) Best Practice

CA PPM

- Module-based system so customers can use features as needed
- Interconnected modules like Project and Resource allow real-time access and visibility of work being done and the resources doing the work
- Detailed resource module allows finding the correct resources to do the work with flexibility to accommodate any company size
- Financial module allows costing transactions, creating cost forecasts across a timescale, and entering non-labor costs
- Portfolio management lets management do real-time project ranking and evaluation in a pipeline and create “what-if” scenarios to evaluate future plans

Administration Overview

- The CA PPM application is administered by an application administrator and can be implemented out-of-the-box or may be configured and customized in order to match the needs of the organization
- You must have been granted security access to the Administration tool

Login to CA PPM

Logon to our RegoU demo environment

- http://regou08.dev.regoconsulting.net:8082
- User Name = beg_adminxx (01-15)
- Password = niku2000

Infrastructure

Infrastructure Overview

- CA PPM Basics
  - Application Server
  - BG Server
  - NSA
  - End Users
  - Database
- It is advised to be familiar with the following for support cases with CA
  - Version
  - SQL or Oracle
  - Windows or Unix Server

Resource Setup

Open Discussion

- Any experience with administrative tasks?
- Any experience working with Resource/User records?
- What are you expecting to get out of this session?
- Do you have any specifics you would like to discuss around these topics?

Resources/Roles

- **Resource –** A person or object (such as a piece of equipment or material) used to perform a task or capture a non-labor expense
- **Role –** A generic description of a function performed by a named resource (for example, Developer, Business Analyst, Project Manager)
  - Used for planning and scheduling work effort
  - Replaced by named resources when work commences

NOTE: Roles are assigned to projects to help identify task work effort and timelines. Named Resources eventually replace roles in order to perform the work and complete the tasks.

Resources/Roles Demonstration

- Creating Resources
  - Application side – contains resource information necessary for staffing projects and entering time
  - Admin side – contains resource information necessary for logging into and using CA PPM (User Profile)
  - Changes in either side flow through to the other
- Create a User Profile (Admin side)
  1. Select ***Administration > Organization and Access > Resources***
  2. Click **New**
  3. Enter user information on the Properties page
  4. Click **Save and Return**

NOTE: Resources created on the Application side are Locked by default on the Admin side

Resource Status

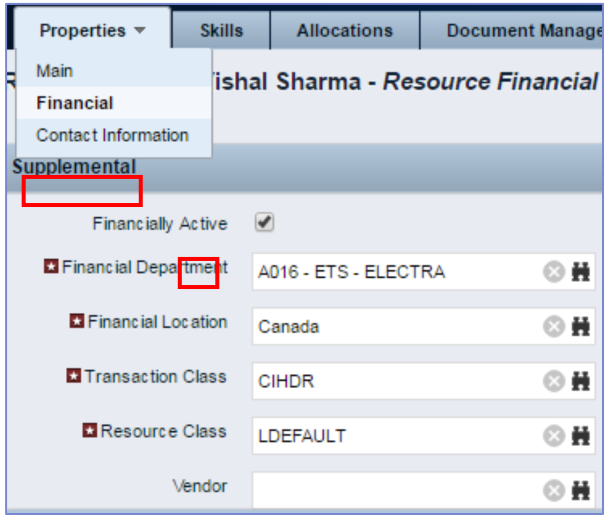
- There are three statuses associated with a resource on the Administrative side of CA PPM
  - **Active –** The resource is in use and can log into CA PPM
  - **Inactive –** The resource is no longer using CA PPM and does not appear on list pages or portlets unless inactive resources are specified
  - **Locked –** The resource appears on list pages and portlets and can be assigned to project, but cannot log into CA PPM
    - This status also appears when a user exceeds the valid number of login attempts

Resources/Roles Demonstration

Update a Resource added from the Home page

1. Select ***Home* > *Resource Management* > *Resources***
2. Use the **filter** section to locate the record previously created for the User
3. Click the resource name
4. Enter Values for all required fields
5. Click **Save and Return**

- Financially Enable a Resource
    1. Access the Resource as described above
    2. Click the **Properties** tab, then select the **Financial** drop down
    3. Check the **Financially Active** box
    4. Click **Save and Return**

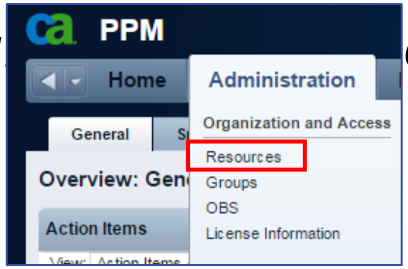


Resources/Roles Demonstration

- Create a new Labor Role
  1. Select ***Home > Resource Management > Resources***
  2. Change *Is Role Filter* to **Yes** in filter options, then *Filter* to display existing roles
  3. Click **New**
  4. Select **Role** on the ***Select Resource Type*** page
  5. Select **Labor** for Resource Type then click *Next*
  6. Populate the required fields then click **Save**
- Financially Enable a Role
  1. Select role using the ***Is Role*** filter as described above
  2. Select ***Properties > Financial***
  3. Check the **Financially Active** box and populate **Transaction Class** and **Resource Class**
  4. Click **Save and Return**

Class Exercise: Creating A Resource

1. Create a new resource - Select *Administration> Organization a* … *ources*



2. Click **New**
3. Enter user information on the Properties page
4. Click **Save**
5. Click the **Properties** tab, then select the **Financial** drop down
6. Fill in the required fields
7. Check the *Financially Active* box
8. Click **Save and Return**

Security Setup

Open Discussion

- Any experience with Security setup?
- Do you think you handle security well?
- Do you find yourself spending too much time managing security?
- What works for your organization?

Security

CA PPM Security

- Types of Rights
  - Inherent Instance
  - OBS
  - Global
- Manage Group/OBS Security
- Object Security
  - Display conditions
  - Securing Sub-Objects
  - Securing Sub-Pages

- Best Practice in Security
  - Resource Manager
  - Project Manager
  - System Admin
  - PMO
  - Individual Contributors
- Monitoring security rights and license counts

Security Architecture

SECURITY ARCHITECTURE				
	OBS Rights	Global Rights	Instance Rights	Inherent Rights
Group	X	X	X	
OBS Level	X	X	X	
Resource	X	X	X	X

Security

- Rights Based
  - **Inherent rights:** Automatically granted by the system
  - **Instance rights:** Used for specific objects (for example, projects or resources)
  - **Global rights:** Provides access to all specified functions of CA PPM
  - **Groups:** Access rights based on membership in a group for users who share common responsibilities (role-based)
  - **Organizational Breakdown Structure (OBS):** User access assigned to objects in CA PPM (for example, projects or resources) linked to a parent-child hierarchy

- Studio Based
  - **Conditional views:** Views display when a preset condition is met
  - **Secure sub-objects / pages:** Security access rights setup for sub-objects and sub-pages
  - **Process-flow drive security (locking fields):** Set process workflows to lock data fields to read only

Security

- Rights Based
- Inherent Rights
    - Automatically applied when user is first added to CA PPM or the user name is associated with a particular field on an object
    - Two Kinds
        - Revocable
            - Resource – Enter Time (for themselves)
        - Irrevocable
            - User Favorites Menu – Edit
- Instance Rights
    - Provides access to specific instance of particular object type
    - Assignable to an individual or group
    - Difficult to manage and administer; minimal use recommended

Security

- Rights Based Cont.
- Global Rights
  - *Overrides* any other associated instance or OBS level rights
  - Provides broad access to objects of a particular type
  - Lets users access a general area of the application to perform a specific function or to all instances of an object
  - Recommended where possible for performance reasons
- Groups
  - Defined as a set of users who perform a similar set of functions (role based)
  - Contains a collection or combination of rights applicable to each member of that group
  - Can associate a single resource with any number of groups
  - Can contain a collection of Instance, OBS, and Global level rights
  - Easy way to assign multiple rights to several people at once
  - Easy to administer

Security

- Studio Based
- Conditional Views
  - Can build display conditions for an object to limit visibility to a view by an individual user or to a group
- Securing Subobjects (Subpages)
  - Applying page level security hides the page from unauthorized users
  - Creating a secure sub-page lets it be invisible to those who do not need to see it

Security

- Implicit vs. Explicit Pre-requisites
- Some rights have requisite rights
  - For example, granting the right to create Security Groups is meaningless if the user cannot access Admin pages
  - Access to the Admin pages is therefore a requisite right for creating Security Groups
- Implicit rights are requisite rights CA PPM automatically grants
  - Implicit rights do not show in the list of rights in the UI
  - For example, “Administration – Authorization” includes implicit rights
    - When granting this right, CA PPM also grants administration access
    - Since this is an implicit right, administration access does not display in the list of rights
- Explicit rights are requisite rights CA PPM does not automatically grant
  - You must manually grant Explicit rights
  - For example, “Administration – Partition Models” does not include implicit rights and you must also manually grant “Administration Access” to the user

Security

- Special Rights
- Collaborator Manager rights
  - Doesn't show in security model screens
  - Only the current Collaboration Manager can make someone else a Collaboration Manager
- Incident Security
  - Create incident categories within the administration section (*Data* > *Incidents*)
  - Give a person/group/OBS rights to manage or select the incident category
- Sub-page Security
  - Mark a sub-page as secure to create edit and view rights for the subpage within the security administration section
  - Give edit or view rights to a person/group/OBS

Security

- Special Rights: Field Level Security
- Read Only Field
  - Non-editable
  - Useful when populated by a process or auto-numbered
- Locked Field
  - Non-editable when locked
  - A field can be locked or unlocked by the process at certain point(s) in the object lifecycle
- Calculated Field
  - Displays a dynamically-calculated read-only value
  - Tip: Place an editable field on a secure sub-page, then place a calculated field based on the editable field on the main subpage to give the appearance of a read-only field
- Dependent Lookup Field
  - Displays values based on the value of another lookup field on the same object
  - Only available in later versions
  - Requires query-based lookups

Security Exercise

Who	Rights	To What/Whom	Method
John Smith	Edit Management	Project X	Add John Smith in the Project manager field of Project X
Marketing PMs	View Management	All projects	Create a group called Marketing PMs. Give the group Global View management rights
IT PMs	Edit management	Only IT projects	Create a group called IT PMs. Give the group OBS specific Edit management rights to just the IT OBS projects

Security Matrix

	G – all items **OBS – only** **I – Item only**	Administrator	Program/ Project Manager	Resource Manager	Resource Manager Admin
Object / Category	**Description**				
Idea Rights					
Ideas – Navigate (G)	Allows user to navigate to Ideas pages. User will need additional rights to view individual ideas.				
Ideas – Create	Allows user to create Ideas. Includes the Ideas – Navigate right.				
Idea – Edit	Allows user to edit ideas.				
Idea – View	Allows user to view ideas.				
Idea – Approve	Allows user to approve ideas.				
Project Rights					
Project – Create (G only)	Allows user to create a new project or program specifying general project properties. Includes Project – Create from Template right.				
Project – Create from Template (G only)	Allows user to create a new project or program using only templates.				
Project – Approve	Allows user to approve all Projects. Includes the Project – Edit – All right.				
Project – Delete	Allows user to delete a Project or				

Security

- Licensing Implications
  - Licensing Portlets
  - Audit periodically
  - Compare with licensing PDFs to validate what the portlet reports

License Information

User Count by License Type

License Type	User Count
Manager	37
Total Licenses	**37**

Rights by License Type

Access Right	Description	License Type
Account Settings - Navigate	Allows Access to the Account Settings page	Enterprise Visibility Option
Accounts Receivable Transaction - XOG Access	Allows user to import and export Accounts Receivable Transaction instances using the XML Open Gateway interface.	Manager
Action Item approval - XOG Access	Allows user to export and approve action items using the XML Open Gateway interface.	Manager
Add-In Administer	Enables administration of add-ins	Manager
Admin Code - XOG Access	Allows user to import and export Admin Code instances using the XML Open Gateway interface.	Manager
Administration - Access	Allows user to navigate to Administration Tool. User will need additional rights to perform individual Administration actions.	Manager

Security Best Practices

- Try to have people receive their rights only once
  - Getting security through OBS rights and group rights or through multiple groups slows down performance in some pages/views
  - Do not use single instance rights where security groups make sense
- Minimize security maintenance
  - Architect security so that adding people or changing groups or roles that change rights requires a minimum amount of effort
- Determine OBS structure early on
  - Even if the OBS structure remains at a high level (2-3 levels), agreeing on those levels makes creating additional levels in the future easier
- Understand what each right means
  - Know the definition of each right
  - Understand the licensing implications of different rights

Security Best Practices Cont.

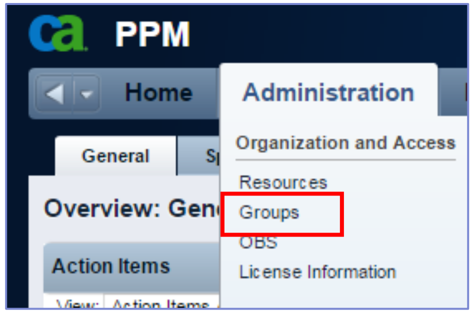
- Define Security Roles
  - Not the same as Primary Role or their Security Groups
  - Theoretical, not in the system
  - Example: Timesheet user is not a Primary Role and it may mean membership
- Pick a philosophy (discussed later)
- Put your security model design on paper first
  - Use OOTB groups as suggestions but be aware you will likely not actually use OOTB groups
- Set up the model in CA PPM
  - Can be concurrent with other implementation coding
  - Create dummy data
  - Create generic test users – one per “role” (not the same as a group)
- Log in as a test user and test and simulate
  - Can you see what you should?
  - Can you NOT see what you shouldn’t? (often neglected in test scripts)

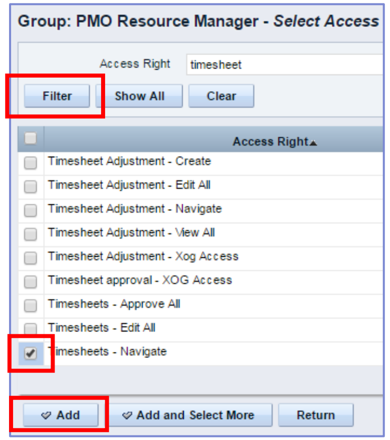
Security Exposure Philosophies

- Underlying Philosophies
  - **Open by default:** restrict only when needed
  - **Closed by default:** open only when absolutely needed
    - Can create unnecessary overhead for the support team
    - Forces the system to run more logic to determine access
  - **Blended:** open by default for everything but Financial information (pay grades, rates, etc.) which should be fully closed
- Choice of philosophy
  - Often driven by standards and compliance (SOX)
  - If possible, blended approach works best
    - Global rights, but within licensing limits
    - For example, don't give timesheet users the rights to manage projects if they don't manage projects
- Auditing versus Security
  - Use when there is a need to know who altered a field
  - Too much auditing can cause performance issues on some versions of CA PPM

Exercise: Create Security Group & Assign Resource

1. Select ***Administration> Groups***
2. Click **New**
3. Complete Required fields (*ID must be unique)
   - Students use your name, e.g. *Angie's Group*
4. Click **Save and Continue**
5. Hover over the **Groups Access Rights** Tab
6. Choose **Global,** click **Add**
7. Use the **Filter** section to search for and add the following:
   1. *Timesheets – Navigate*
   2. *Resource – Navigate*
8. Click on the **Resources Tab**, Click **Add**
9. Use the **Filter** section to search for a resource.
10. Click the checkbox next to the resource and click **Add**





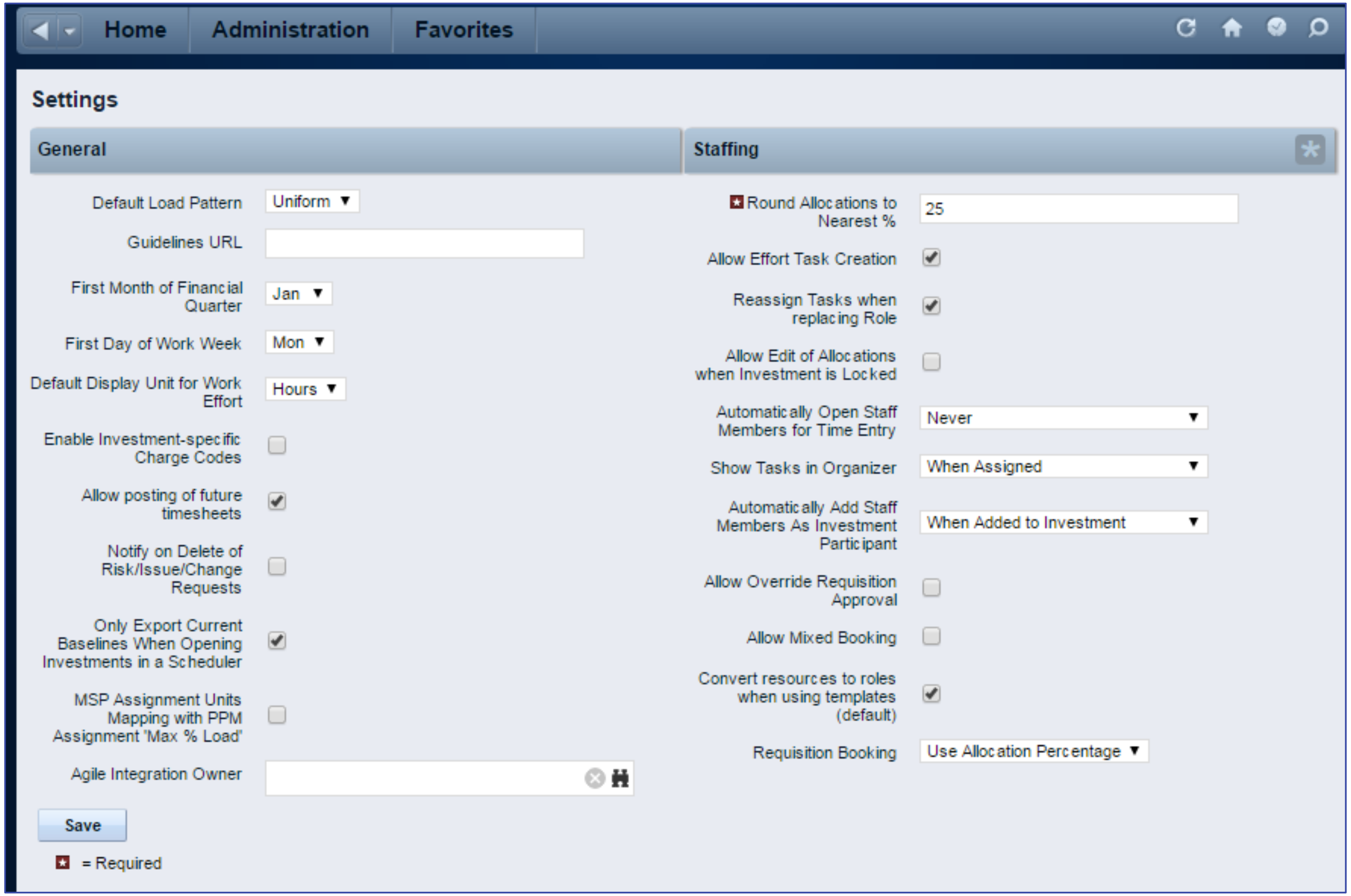
Ongoing Data Management

Ongoing Data Management

- Administration tasks can be broken down into one-time and on-going tasks
- One-time tasks are initial settings that are created at the time CA PPM is set up and then evaluated annually or as needed
- One-time tasks include setup of new objects and attributes
- On-going tasks include regular administrative tasks that are needed such as posting, updating time periods, regular reporting, etc.
- Examples:
  - Daily - make sure all scheduled jobs processed correctly
  - Monthly – open/close time sheet periods
  - Annually - create new time periods for the year

System Options

Project Management Settings



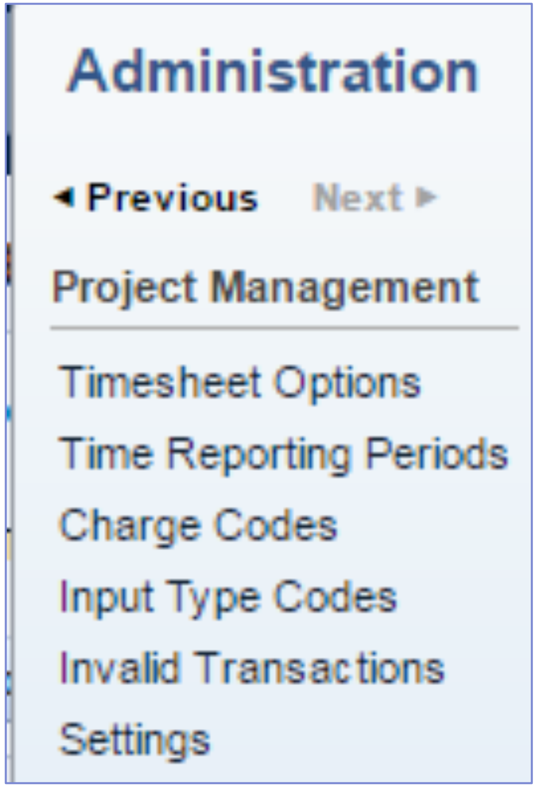
Project Management Settings

- **General Settings**
  - *Navigation: Administration > Project Management > Settings*
- **Timesheet Options**
  - *Administration > Project Management > Timesheet Options*
- **Timesheet Options - Recommended settings**
  - Remove Charge Code and Input Type Code
  - Increase task assignment windows for populating timesheets from 7 days before and after to 14 days before and after if you do not regularly update project schedules
  - Make sure timesheet column sequence is Notes Icon, Investment, Phase Description, Daily Actuals, Total, ETC

Project Management Settings

Time Reporting Periods

- *Administration > Project Management > Time Reporting Periods*
- Application Administrators use this section to create and manage time reporting periods
- Time reporting periods are Weekly
- Set start date to the company standard (usually Saturday, Sunday, or Monday)
- Open and close time periods based on company accounting rules
- When a month closes and allows no more entries, close the period in CA PPM



Project Management Settings

- **Charge Codes**
  - *Administration > Project Management > Charge Codes*
  - Does not require enabling the Financials module
  - Allows a company to define an additional financial dimension for projects
  - Available as an element in the rate/cost matrices
  - Can use to determine the rates and costs applied to financial transactions
- **Input Type Code**
  - *Administration > Project Management > Input Type Code*
  - Is one of the Resource financial fields
  - Allows the end user to define an additional financial dimension for resources
  - Available as an element in the rate/cost matrices
  - Can used to determine the rates and costs applied to financial transactions
  - Can assign to resources within the Resource General Properties page

Charge Code And Cost Type

- Introduced in version 13.2
- Cost type values are Capital and Operating
- For those using Charge code for Capital and Operating, there is a job to update the Cost type automatically
- Considerations
  - Cost type is not available on Debit rules or Credit rules for Chargebacks
  - Cost type is not available on the Transaction Entry screen
  - Cost type is not available on the timesheet
  - You cannot change Cost type at the assignment level

Base Calendars

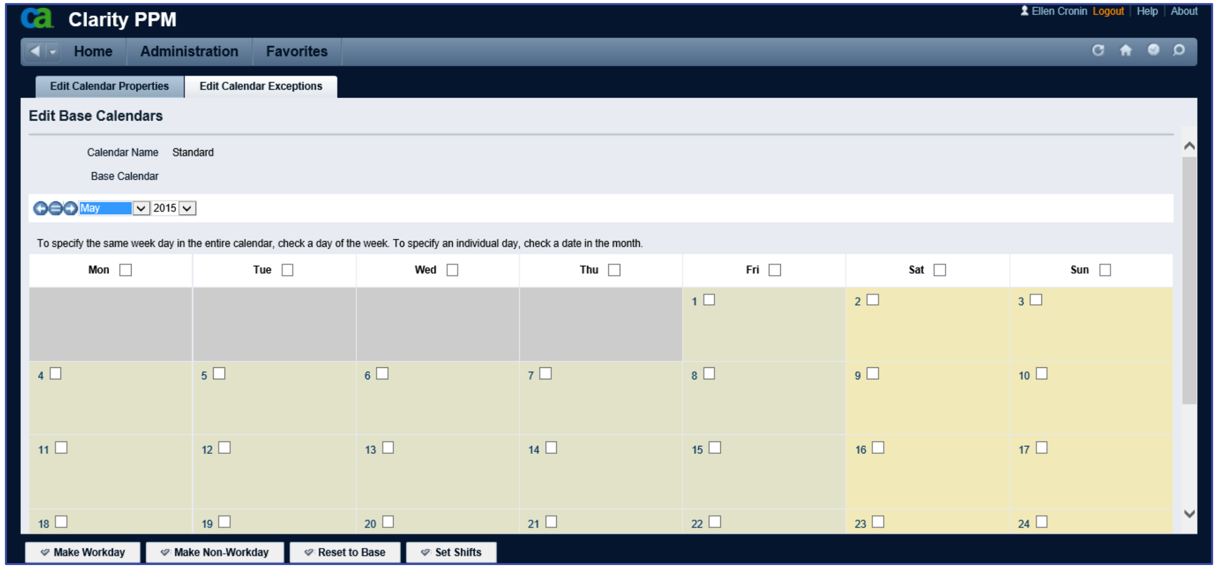
- *Administration > Project Management > Base Calendars*
- Base calendars reflect standard holidays and other unavailable workdays for the company
- Application Administrators set up base calendars
- Organization resources use the calendar as their base calendar
- You can select and assign Exception calendars to applicable resources

- Resources may also select non-work days like vacation time on their own calendars
- Each year you can add new holidays to the standard calendar
  - All holidays based on that calendar inherit the new holidays

Best Practice
Evaluate calendars annually and add the holidays for the coming year.

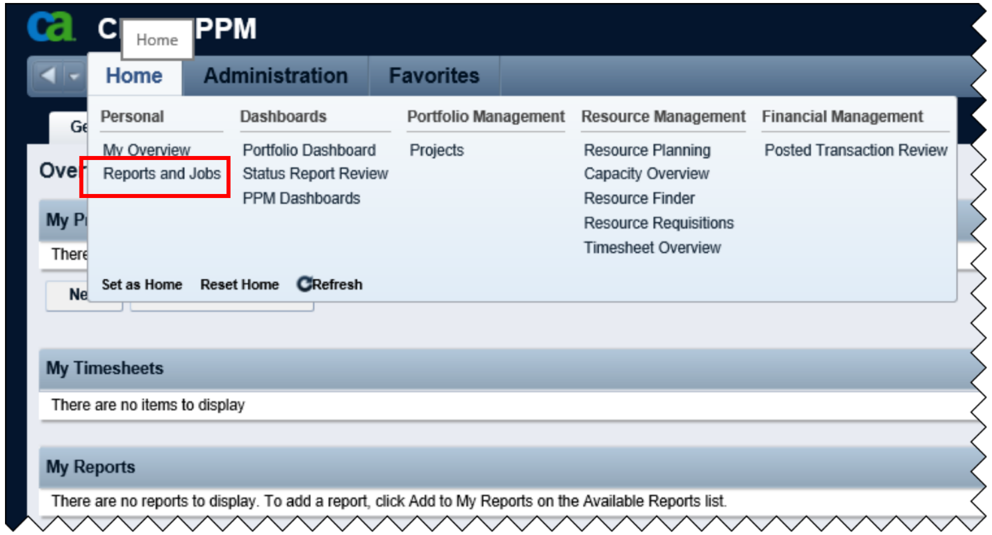
Calendar

- Use the standard calendar as a basis for other calendars (only need to set up holidays once)
- Reflect the standard workday in the calendar
- Set up additional shift or location calendars as needed



Reports And Jobs

- Only users granted Reports and Jobs permissions see the link
- Within the link, users only see the individual reports and jobs for which they have permissions
  - Users can add frequently used reports to their “My Reports” portlet on the Overview page
  - Advanced Reporting (Jaspersoft) is not covered in this class.

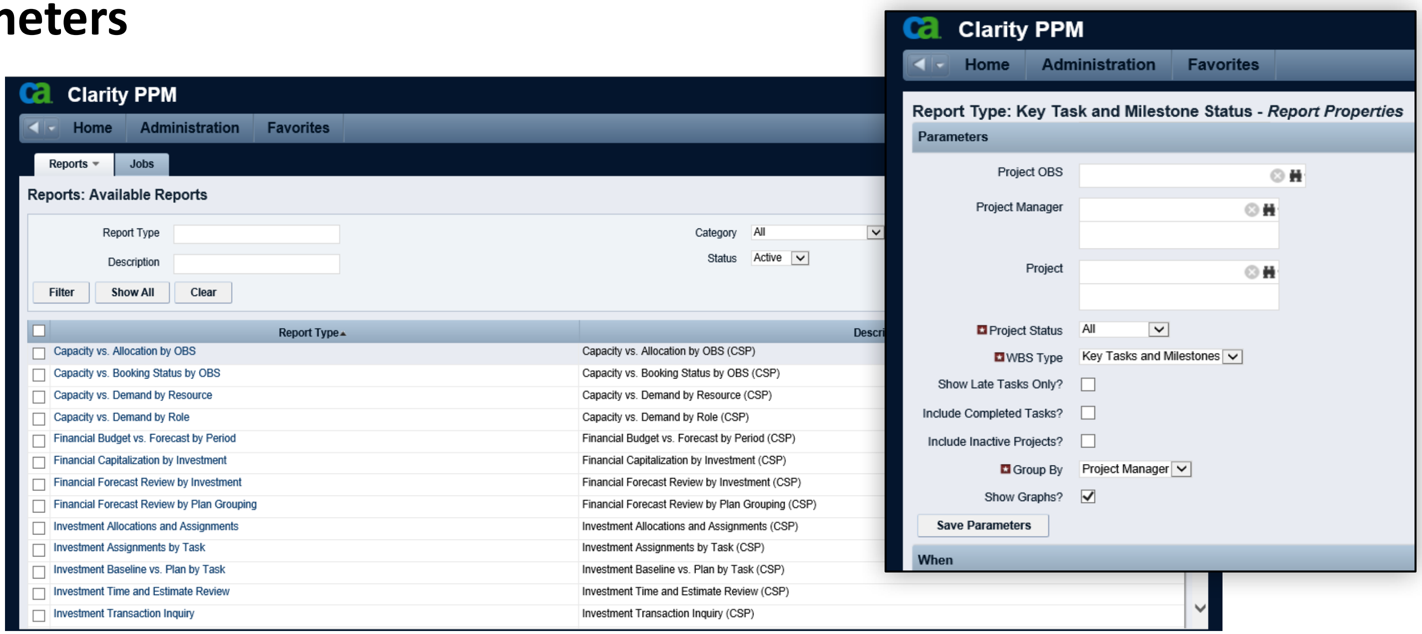


Reports Demonstration

Run a Report

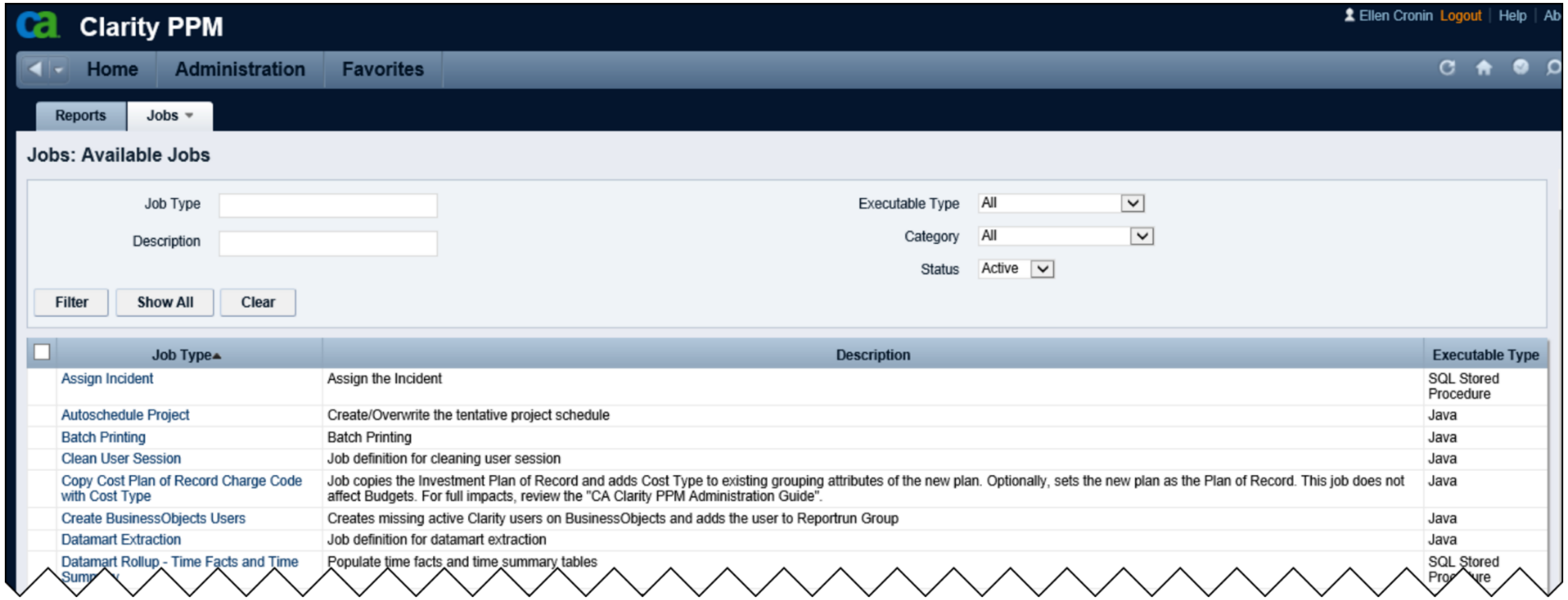
1. Select *Home>Reports and Jobs*
2. Click on the **Reports** tab
3. Click the report title
4. Enter the desired parameters
5. Click **Save Parameters**
6. Click **Submit**

NOTE: Turn off your browser's pop-up blocker or allow it to accept pop-ups from CA PPM



Jobs

- Jobs control the movement and collection of data
- System administrators usually run jobs
- You can set up jobs to run on a schedule



Class Exercise – Schedule A Job

1. Select ***Home>Reports and Jobs***
2. Click ***Jobs tab***
3. The ‘Available Jobs’ window will display
4. Scroll to the ***Post Timesheets*** job and click on the name.
5. In the ***When*** *section* **uncheck** ***Immediately*** and **check** ***Scheduled***
6. Select a **Start Date** and **Start Time**
7. Click **[Set Recurrence]**
8. Choose *Monthly* or *Weekly*
9. Select Days, Months, and end date if necessary for Monthly or Weekly Recurrence
10. Click **Save And Return**
11. Hover over the ***Jobs Tab*** and click on **Scheduled Jobs**

Jobs: UNIX Crontab

- Crontab is an advanced format to be used for Job Scheduling
- Crontab has five fields specifying day, date and time
- Cron uses the server time, not the time o

Min	Hour	Day/month	Month	Day/week	
30	0	1	1,6,12	*	00:30 Hrs on 1st of Jan, June & Dec
0	20	*	10	5-Jan	8:00 PM every weekday (Mon-Fri) only in Oct
0	0	1,10,15	*	*	Midnight on 1st, 10th & 15th of month
5,10	0	10	*	1	At 12:05, 12:10 every Monday & on 10th of every month

Time Slices

Overview

- *Administration > Data Administration > Time Slices*
- To make the best use of space on the database, CA PPM stores data in a compressed format called a BLOB (Binary Large Object)
- Because most reporting tools cannot read BLOBs, CA PPM extracts data from them with a “Time Slice” job and stores the results in a flat table
- Time slices can differ for each type of data

Timesheet

Time Period: 2/27/12 - 3/4/12

Resource Name: Paul Martin | Modified by: Paul Martin

Timesheet Status: Open | Last Modified: 1/23/13 4:09 PM

Investment	Description	Input Type Code	Mon 2/27	Tue 2/28	Wed 2/29	Thu 3/1	Fri 3/2	Sat 3/3	Sun 3/4	Total	ETC
Tasks											
eCommerce Portal	Complete Project Plan	Regular								0.00	12.00
Online Order Performance Improvements	Define Scope Change and Control Process	Regular								0.00	40.00
Online Order Performance Improvements	Define Resource Plan	Regular								0.00	80.00

CA PPM:

BLOB data is never erased

Time Slices

Sources of Data

- *Core Clarity Tables (Real Time)*
  - *Resources*
  - *Investments*
- *Datamart (Nightly)*
  - *NBI_PRT_FACTS*
- *Time Slices (Near Real Time)*
  - *PRJ_BLB_SLICES*
  - *PRJ_BLB_SLICEREQUESTS*

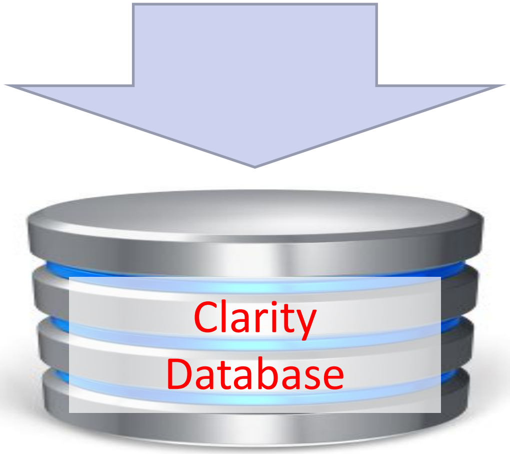
Time Slices

Timesheet

Time Period: 1/13/14 - 1/19/14

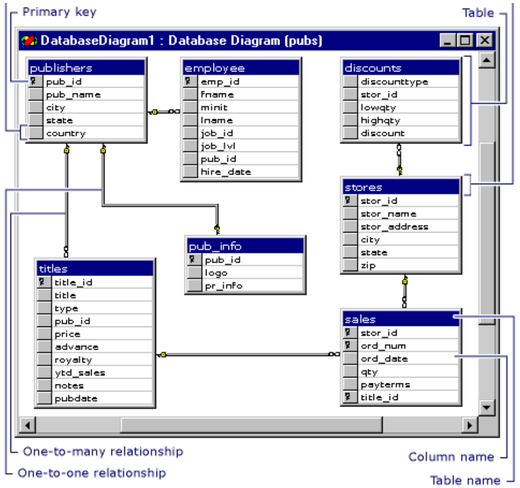
Resource Name	Chris Shaffer	Modified by	Chris Shaffer
Timesheet Status	Open	Last Modified	1/15/14 3:05 PM

Investment	Description	Input Type Code	Mon 1/13	Tue 1/14	Wed 1/15	Thu 1/16	Fri 1/17	Sat 1/18	Sun 1/19	Total	ETC
Tasks											
Admin - Internal Training	Training Session Prep	Off-Site Hours		2.00						2.00	0.00
American Family Insurance - 2014 Support (Level 2-3)	Negative Actuals	Off-Site Hours		2.50						2.50	0.70
American Family Insurance - Implementation	Team Meetings	Off-Site Hours		0.50	1.00					1.50	36.50
American Family Insurance - Implementation	Financial Reporting / Portfolio Projects	Off-Site Hours	3.00	1.00						4.00	0.00
American Family	V13 Upgrade Training Environment	Off-Site Hours		0.50						0.50	31.27

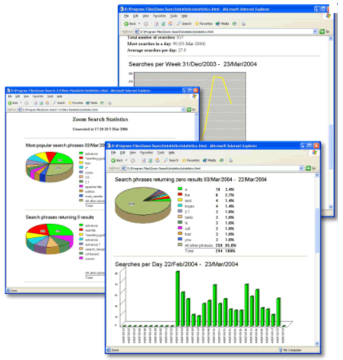


Time Slices

Timeslice job



Portlets, Reports, Dashboards…



Types of Timeslices

Standard Out-of-the-Box

- There are five DAILY out of the box slices
- These slices populate the DataMart and some reporting tables
- **NEVER** change these slice names

ID	Request Name
1	DAILYRESOURCEAVAILCURVE
2	DAILYRESOURCEACTCURVE
3	DAILYRESOURCEESTCURVE
10	DAILYRESOURCEALLOCCURVE
11	DAILYRESOURCEBASECURVE

Types Of Timeslices Cont.

Standard Out-of-the-Box cont.

- There are four MONTHLY out of the box slices.
- These slices do not populate the DataMart but are used in reporting

ID	Request Name
4	MONTHLYRESOURCEACTCURVE
5	MONTHLYRESOURCEESTCURVE
6	MONTHLYRESOURCEALLOCCURVE
7	MONTHLYRESOURCEAVAILCURVE

Timeslice Rollover

- Time slices are a rolling “window” of time.
- When the slice moves from one period to the next is referred as “Rollover”

Slice Range																									
Qtr			Qtr			Qtr			Qtr																
Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16

			Slice Range																						
			Qtr			Qtr			Qtr			Qtr													
Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Jan-15	Feb-15	Mar-15	Apr-15	May-15	Jun-15	Jul-15	Aug-15	Sep-15	Oct-15	Nov-15	Dec-15	Jan-16	Feb-16

Types Of Timeslices Cont.

Internal Timeslices

- Often referred to as Hidden slices because they do not appear on the Time Slices Page
- Used in Team Detail and Resource Planning time scaled views
- Sliced and built instantly when saving data in the UI
- Cannot populate until after initial DataMart settings are defined

Best Practices

DataMart/Slices

- Keep Daily Timeslices to a minimum
- Use monthly or weekly slices whenever possible
- Try to avoid using daily dates in portlets
- Run the DataMart job on a nightly basic schedule

Best Practices Cont.

Time Slices

- Actuals
  - Keep daily slices to a minimum
- ETCs
  - No need for ETCs in the past; set From Date as the start of the current month
- Baselines
  - If unused, set the number of periods to 0
  - If used, start slice data at the beginning of actuals and extend through estimates
- Availability
  - Set From Date equal to Actuals From Date
  - Set the number of periods to cover the range

DataMart Settings

DataMart Settings Cont.

- The DataMart provides point-in-time flat file report tables
- There are five DataMart settings sections
  - Currency
    - The DataMart stores all financial data in one currency
    - When setting up the DataMart, specify the currency used
    - You can only use one currency for reporting
  - Entity
    - Relates to Financial Attributes
    - You can use only one Entity
  - Extraction Job
    - Customize the extraction job to exclude tables not needed for reporting
  - Project Organizational Structure Mapping
    - Set a default Project OBS to handle Projects not associated with an OBS
    - Changing the setting requires a DataMart refresh
  - Resource Organizational Structure Mapping
    - Set a default Resource OBS to handle Resources not associated with an OBS
    - Changing the setting requires a DataMart refresh

DataMart Settings Cont.

- All users share the values specified on the DataMart Settings page
- You can only define one Entity and Currency value
  - Entity and currency cannot change once the first DataMart job runs
- Enable (check) all three DataMart Extraction customization fields
- Add all appropriate Project and Resource OBS structures for downloading
  - You must set a default OBS for each OBS type in order to have the DataMart extraction use it
  - You can have up to five OBS structures attached to a DataMart
  - If you see the *New* button, you can still attach OBS structures to the DataMart

OBS Setup

Open Discussion

- Any experience with OBS maintenance or setup?
- Any experience with OBS and Security?
- What are you expecting to get out of this session?
- Do you have any specifics you would like to discuss around these topics?

Organizational Breakdown Structure (OBS)

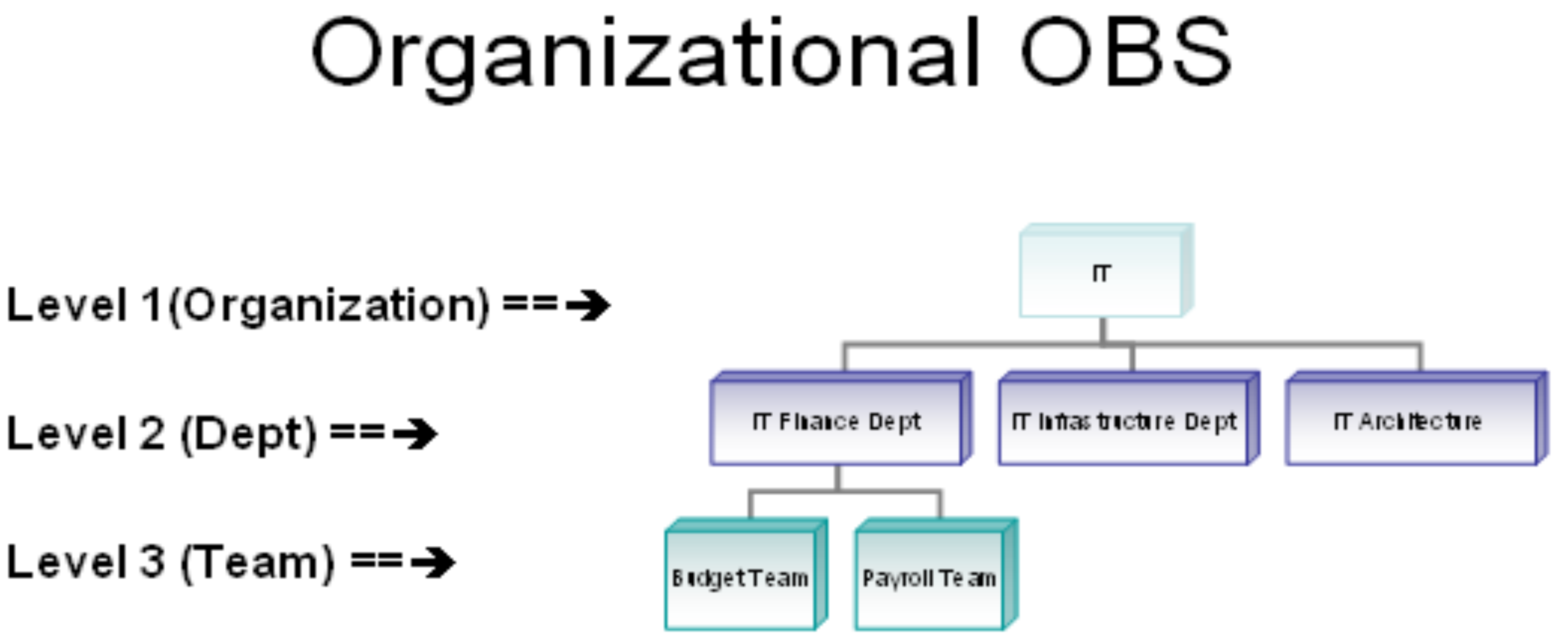
- OBS is a company-defined hierarchical structure to categorize projects and resources used for reporting and filtering
- You can usually create OBS's as needed, but can attach no more than five to a DataMart
- Multiple OBS's with security enabled are possible
- If enabling security for an OBS, add *all* users in the system to that OBS
- OBS is a default parameter on most out of the box reports

Organizational Breakdown Structure (OBS)

- Components to consider
  - OBS Type
  - Levels (up to 10)
- OBS Type
  - Determined by business needs
  - There can be a single corporate OBS or several OBS structures to organize and report data as needed
- Examples of Common Criteria
  - Geographic location
  - Resource roles and/or order of authority
  - Project size / type / initiative
  - Products

Best Practice
Keep it as simple as possible;
complexity creates maintenance

Organizational Breakdown Structure (OBS)



OBS Demonstration

Best Practice
The Name of the OBS should describe how it will be used.

Creating an OBS

1. Select *Administration > OBS*
2. Click **New**
3. Name the OBS (this is what users see)
4. Create a unique OBS id (for example, xx_ex_obs)
5. Name the levels of the OBS (for example Department, Location)
6. Choose the Associated Objects this OBS will be associated with (for example the Project object)

Add Units to the OBS

1. Click on the **Units tab**
2. Click **New**
3. Name the Unit and choose the Parent Level

Note: Add units manually as above, or use the Quick Create feature

OBS Demonstration

- Add Units using Quick Create - Quick Create lets you quickly add multiple OBS values with the same parent

1. Click on the **Units tab** and click **Quick Create**
2. Choose the Parent Level and create the Unit Names

- Attaching Instances - Attach instances for each object associated (for example Resources)

1. Click on the **Attached Instances tab**
2. Choose the **Object** from the dropdown
3. Any resources already attached will display.
4. Click **Add** to add additional items to the Unit

OBS Demonstration

Adding a Resource to an OBS

Three options:

1. The Resource record - *Home>Resources*
2. The User profile - *Administration>Resources*
3. Attached instances within OBS

Add OBS level Security

1. Administration>Groups
2. Groups Access Rights Tab>OBS Unit
3. Add Resource – Approve Time permissions and select OBS.

Maintaining an OBS

Maintaining an OBS

- Deleting OBS legs may affect reporting so use caution.
- Deleting OBS Units will also delete any child levels
- If you don’t need historical data, edit OBS legs that are being replaced
- Add new OBS legs to the existing structure
- You can move OBS units from the same level to another within the selected OBS

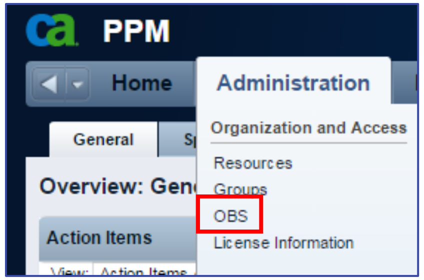
Class Exercise: Create An OBS

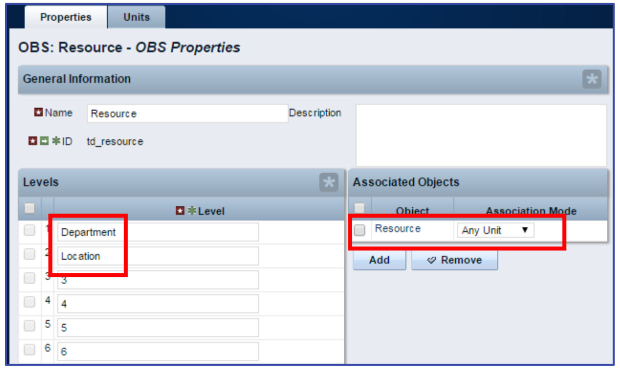
Creating an OBS

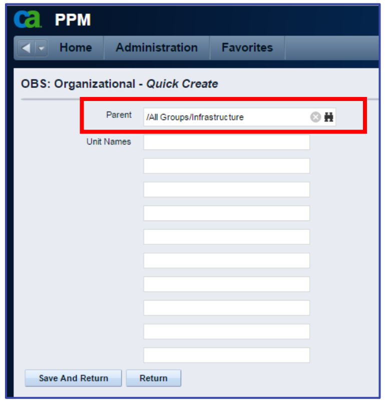
1. Select ***Administration > OBS***
2. Click **New**
3. Name the OBS (this is what users see)
4. Create a unique OBS id
5. Name the levels of the OBS (for example Department, Location)
6. Choose the Associated Objects this OBS will be associated with (e.g. Resource object)

Add Units to the OBS

1. Click on the **Units** tab
2. Click **Quick Create**
3. Choose the *Parent Level* and add the Unit







Questions?

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- Enter **Description**
- Enter **Date Started**
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