

	Ref:	NR/L3/MTC/MG0176/08
	Issue:	3
	Date:	04 September 2010
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Ellipse work management handbook		
8. Work Management Reporting Tools		

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Work Management reporting Tools

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8 Work management reports preface

8.1 Purpose

To date most of the focus in Ellipse has been on resolving data quality issues, managing backlog and staff engagement. All of this is key to providing us with a solid platform to build upon.

Having achieved much improvement with data quality and backlog management the time is now pressing to change the emphasis to use Ellipse as a tool.

Infrastructure Maintenance needs to deliver the annual plan in the most efficient way, achieving both output and financial targets whilst maintaining compliance. Ellipse has a key role to play in this, both from a scheduling and planning perspective but also from a performance monitoring perspective.

To put this into context we need to do the right work, at the right time in the most effective manner:

- The right work is as laid down in the annual plan
- The right time is maintaining the schedules that are produced and are delivered week in week out as these should support the delivery of the annual plan
- The most effective manner is using the right resource in the most productive way

To measure how effective we are in delivering the above we shall be utilising the Ellipse reports listed in section 8.3.

8.2 Scope

This document shall be used by those staff involved in the planning process for maintenance.

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8.3 Report types

The Enhanced Reporting Tools (ERT) has been developed by the Asset Systems Managers Organisation (ASMO) for systems & data. The ERT has been developed in Microsoft Access 2000, with output to Microsoft Excel 2003. This has been developed as an interim tool, whilst we await the delivery of a standard Business Intelligence tool.

There are 4 reports to choose from:

Backlog Report

Work In Progress Report

Future Work Report

Annual Plan v Actual

These reports can be found in the following location, and can be used by anyone who has access to Ellipse:

V:\sz\sz05groups\Ellipse Reporting\ASMO Enhanced Tools

The data being reported in the ERT is taken from an Ellipse standard RDL data download file. There are scheduled reports that are run weekly on Thursday nights by the ASMO under the user MAhmed1; these scheduled reports are used for national reporting. The ERT has been designed to be updated using either the weekly scheduled reports or by using a file run by the user at any point throughout the week. For reporting parameters please contact the ASMO.

Backlog Report – a list of the Ellipse work arising and MST work orders that have exceeded their Required Finish Date. There is an option to run a Business Critical backlog specific report, and the grace period can be manually set to suit local reporting requirements. All outputs are in Excel pivot table format and any cell can be double clicked upon to display the work order information behind the numbers.

(See section 9 figure B1 & B2 for example)

Work In Progress Report – a measure of output in units of work delivered against work scheduled. The purpose of this report is to show the work achieved vs. that scheduled. This can be looked at week by week, by period or year to date basis at Section Manager, Depot Functional Engineer, IMDM or at Route level.

(See section 9 figure B3 & B4 for example)

The idea is to compare the work we said we were going to do, within that period, with that achieved. This should show us how good we are at achieving our own plan – i.e. if a Section Manager commits a certain amount of work within a certain week – how much of that work was achieved?

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Future Work Report – a projection of future cyclic and work arising activities quantifying both units of work and hours required to deliver them. These will be complemented by the continuing use of the backlog reports and compliance reports all of which will continue to be generated from Ellipse.

(See section 9 figure B5 for example)

Annual Plan v Actual – a measure of output in units against the annual plan units as agreed in the business plan. This can be viewed on a period or year to date basis at Section Manager, Depot Functional Engineer, IMDM or Route level.

(See section 9 figure B6, B7 & B8 for example)

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