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**Generating metrics from PDSM**

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Last Revision: [Date]

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# Document Information and Revision History

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| **Version** | **Date** | **Author(s)** | **Revision Notes** |
| 0.1 | 12/04/2018 | Andrea Vincent 3668783 | First Draft |
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# Introduction

The purpose of this document is to provide instructions on how to generate productivity metrics from the task data in PDSM.

# Scope definition

Step-by-step instructions to producing PDSM metrics.

# Generating metrics from PDSM

## Getting a list of Closed Complete tasks in a time range

1. Log into PDSM
2. Under “Reports”, click “View / Run”
3. Switch to “Group” reports
4. Click “Completed Catalog Tasks for UMRF (current month)”
5. Edit the filter to “Closed” “Between” [start date] [end date]
6. On the left, click “Choose columns”
7. Select these columns:
   1. “Number”
   2. “Opened”
   3. “Closed”
   4. “SupportTracker2PDSM.Title:”
   5. “Assignment group”
8. On the top right, click “Run”
9. Right-click the report and export to Excel, then download
10. Copy the data
11. Paste into “UMRF Metrics Workbook”>[Data sheet of week]

## Preparing a RegEx macro in Notepad++

1. Open Notepad++
2. Click “Macro” > “Start Recording”
3. Click “Search” > “Replace…”
4. Enable “Wrap around” option
5. Select “Regular expression” search mode, without “. matches new line”
6. Perform the following replacements:

|  |  |
| --- | --- |
| (State|Assigned to) | \1, |
| Field changes\s\*•\s\* |  |
| \s\*was\s\* | , |
| (\d{4}-\d+-\d+ \d+:\d{2}:\d{2})[\r\n]+ | \1, |
| (\d{4}-\d+-\d+ \d+:\d{2}:\d{2},)(.+[\r\n]+)(State.+|Assigned.+) | \1\2\1\3 |
| ^\D+ |  |
| (.\*,[\w ]+,[\w ]+)(.\*) | \1,\2 |
| (.\*),(.\*),(.\*),(.\*), | \1,\2,\3,\4 |
| (.\*),(.\*),(.\*),(.\*) | \1,\2,\4,\3 |

1. Select “Extended (\n, \r, \t, \0, \x…)” in search mode
2. Perform the following replacement:

|  |  |
| --- | --- |
| , | \t |

1. Close the “Replace” window
2. Click “Macro” > “Stop recording”
3. Click “Macro” > “Save Current Recorded Macro…”
4. Give it a name (suggestion: “Metrics macro”)
5. Give it a shortcut (suggestion: CTRL+SHIFT+0)
6. Click “OK”

## Getting status and assignment updates for each task

For each task in the list:

1. Copy its Number, Opened, Closed, Title, Assignment group
2. Paste into raw data sheet in Excel
3. Copy its Number
4. Paste into search bar in PDSM
5. Filter Activities (funnel button on the right of the section) to display only “Assigned to” and “State”
6. Copy Activities
7. Paste into Notepad++ (if there are no spaces before and after the words “was”, this has been done incorrectly)
8. Run the metrics macro (shortcut)
9. Copy edited activities
10. Paste into raw data sheet in Excel
11. Duplicate Number, Opened, Closed, Title, Assignment group in each line of activity

## Calculating elapsed time between status updates in Excel

Each change in state after a task has been opened needs to have an elapsed time calculated since the last change in state. The following code automates this calculation:

|  |
| --- |
| =IF(G2="State",IF(I2<>"Open",IF(G3="State",F2-F3,IF(G4="State",F2-F4,IF(G5="State",F2-F5, IF(G6="State",F2-F6,IF(G7="State",F2-F7,IF(G8="State",F2-F8,IF(G9="State",F2-F9,IF(G10="State",F2-F10,IF(G11="State",F2-F11,IF(G12="State",F2-F12,IF(G13="State",F2-F13,IF(G14="State",F2-F14,IF(G15="State",F2-F15,IF(G16="State",F2-F16,IF(G17="State",F2-F17,IF(G18="State",F2-F18,IF(G19="State",F2-F19,IF(G20="State",F2-F20,IF(G21="State",F2-F21,IF(G22="State",F2-F22,"Add more terms to conditional or calculate by hand")))))))))))))))))))),""),"") |

Paste it into J2 and drag down.

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