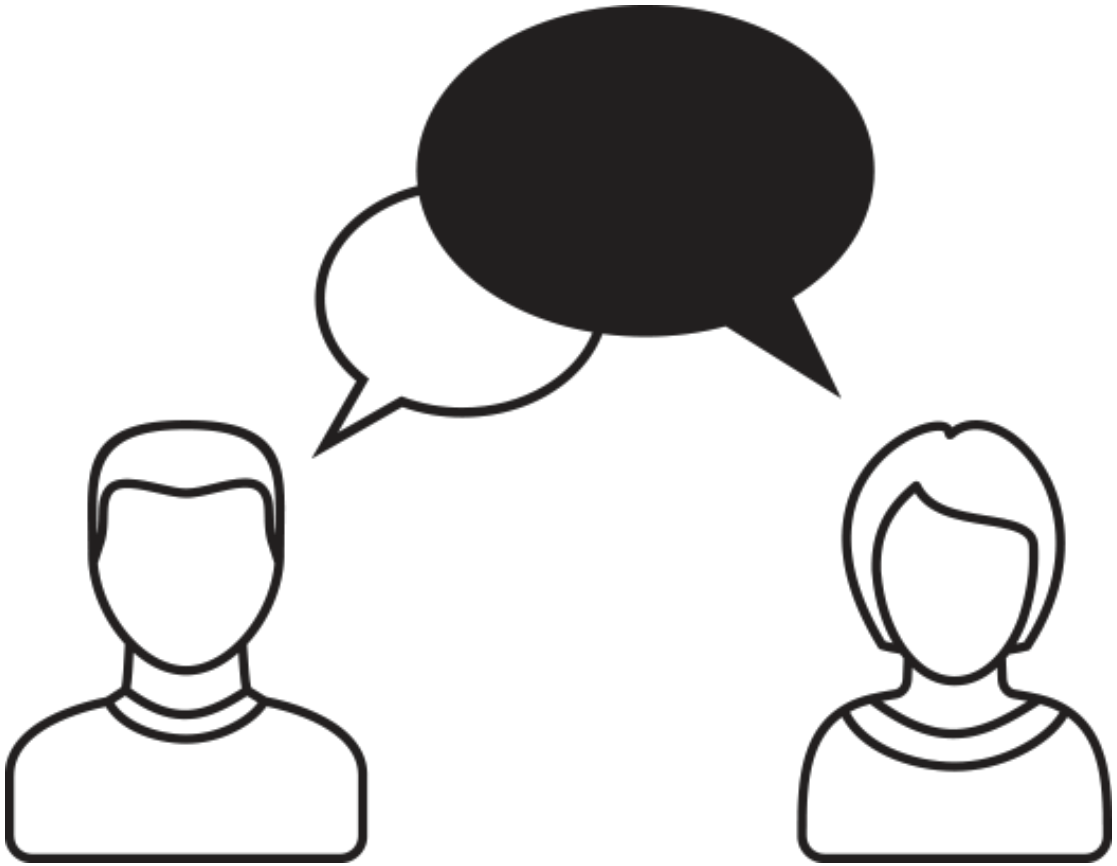

regoUniversity 2017
Reporting | Strategies
Your Guide: Doug Greer, Jen Scarlato, Josh Leone

# Introductions

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



# Agenda

- Reporting Strategy Introduction
- Open Mic – Reporting Concerns
- Reporting Organization and Data Governance
- Reporting Architecture
- Reporting Tools
- Open Mic - Reporting Delivery
- Operational Model
- Best Practice Tips
- Questions

## Goals of this session

- You will leave the session with answers to the following questions:
  - What are the fundamentals of a good reporting strategy?
  - What tools are available with CA PPM to get data out?
  - Which tools should I utilize? What are their relative differences?
  - What overall approaches can and should I take to reporting?

# Reporting Strategy Introduction

regoUniversity 2017

Let Rego be your guide.

# Open Mic

- What are your biggest concerns when it comes to reporting in your organization?
- Is there more than one source for the same information?
- Do your users utilize the reports available?

# The Data Is There…

Is this data accurate? None of the data matches.

I have to go to too many places to pull it all together.

I can't find what I need

This data is old.

Why can't the data predict when I may have a problem before it is too late.

…but we need a strategy to harness its power and ensure the data is a trusted source of information.

# Reporting Strategy Components

**Report Organization**
Establish user profiles within the organization, and design reports based on their needs. This includes what data is desired, when it is needed, and ensuring easy access. Classify reports to help determine how to manage the them, including accessibility, performance considerations, security and report architecture.

**Data Governance**
Putting into place standards and processes that assist in manging the accuracy of the data, as well as the data dictionary within the organization. Mapping out the system of record for key data

**Architecture**
Utilize the right technology for the reporting needs, and understanding the reporting capabilities and how they fit into the end user requirements

**Operational Model**
Define an operation model for reporting. Establish guidelines for introducing new reports, data dictionary training, reporting release schedules, ad hoc support, self service, and report maintenance

# Reporting Organization and Data Governance

regoUniversity 2017

Let Rego be your guide.

# Report Organization

**Consistency**


**Usability**

Reports delivered to the users can be classified into one of the above three categories. This categorization is used as a guide when building the report and the architecture required to support it.

# Data Governance

Often clients struggle with users trusting the data that is in the system. The core issue can have one of several causes, however if the data is not trusted, users will use the tool on a limited basis, doing 'just enough' to put in information they are being asked to. They do not utilize the system to its full potential.

- Manage accuracy of data
  - User adoption is low
  - Timing of interfaces is off
- Data Dictionary
  - Not all users define the terms the same, therefore are pulling different data elements from different places, and labeling them the same thing
- System of Record
  - When integrating multiple systems, the data is not up to date in one system or the other, and therefore one set of data is always out of date.

# Reporting Architecture

regoUniversity 2017

Let Rego be your guide.

# Architecture

## We break down architecture into three areas:

### SYSTEM

Identify the reporting systems that will be utilized in an enterprise strategy. Will data come from multiple systems? Will we need to send data to an enterprise reporting tool?.

### DATA

Identify what data is important to the organization, and understand how you want that data to be aggregated.

### DELIVERY

There are various reporting tools available to us for reporting on data. It is important to utilize the right technology for the right data and audience.

# System Architecture - Enterprise BI

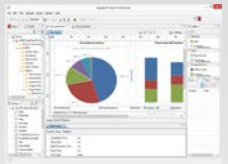
- Many organizations have an enterprise BI tool within their reporting landscape, and it is important to establish how CA PPM fits into the reporting solution.
- Systems commonly seen include:
  - Tableau
  - MS PowerBI
  - Spotfire
  - Qlik View

- If you are an on premise implementation you can connect today
- If you are a SaaS implementation, you can connect via extracts
  - Rego has an extract tool available
- It is planned that SaaS implementations can take advantage of direct integration to external reporting solutions via an OData connection.

# Delivery

- CA PPM provides several ways to report on data within the tool.
  - 14.2
    - Portlets, Business Objects AND Jaspersoft
  - 14.3
    - Portlets, Business Objects AND Jaspersoft
  - 15.x
    - Portlets, Jaspersoft

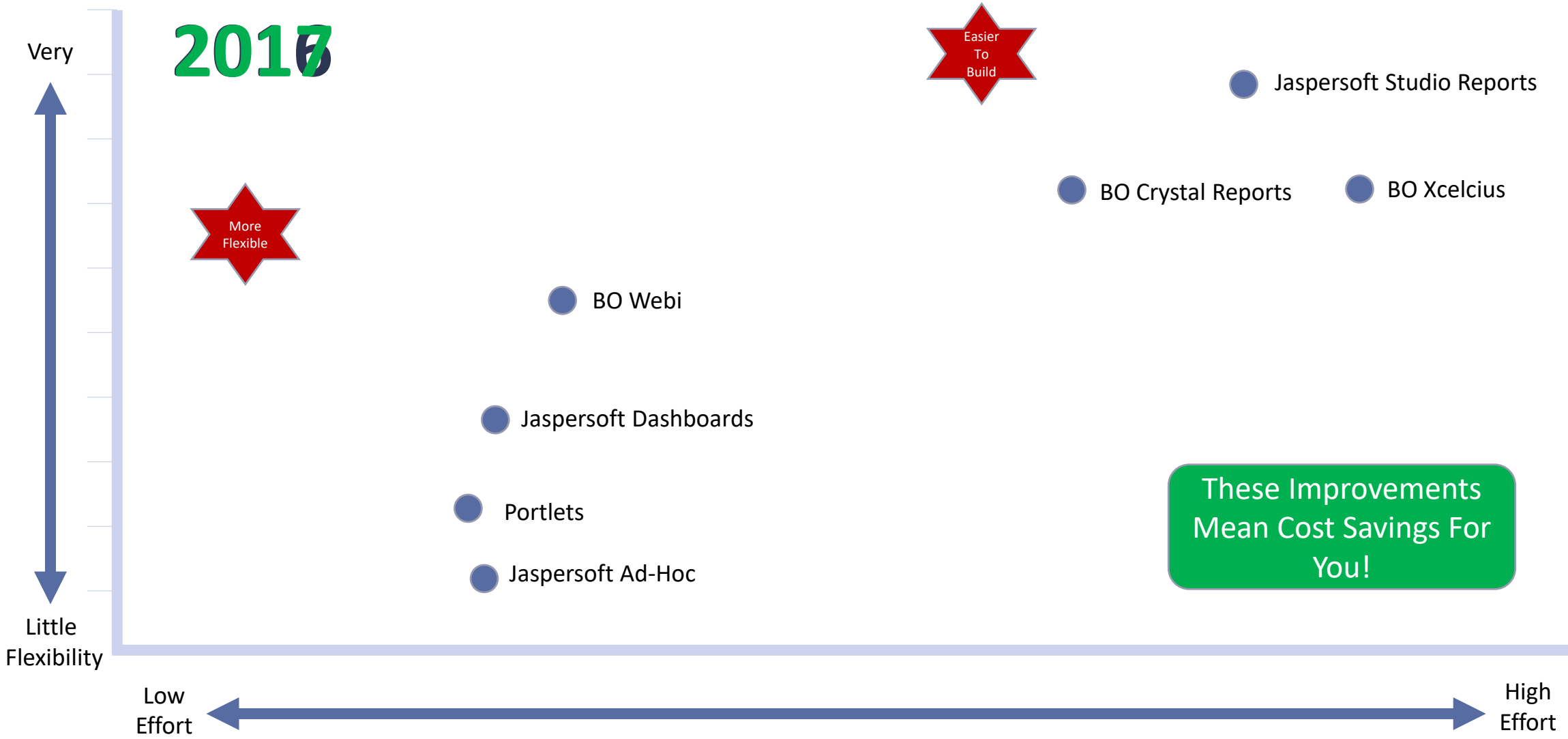
# Reporting Tools

| | | |
|---|---|---|
| **Portlets**<br>  | • Data wholly resides in Clarity<br>• Reports are operational, used day to day.<br>• Data is rendered within acceptable performance thresholds | • The data does not need to be accessed by non-clarity users<br>• The number of data elements required does not negatively affect the usability. |
| **Dashboards**<br>  | • Summary level information that can be further drilled into<br>• Dashboards provide an easy-to-read interface | • Dashboards provide interactive viewing, and drill down capabilities |
| **Jaspersoft Reports**<br>  | • Data wholly resides in Clarity<br>• PDF Format needed<br>• Format requires advanced formatting<br>• Report access outside of Clarity required | • Archiving is required<br>• Multiple reports required and presented as a single package<br>• Large number of calculations |
| **Ad-Hoc**<br>  | • Data wholly resides in Clarity<br>• PDF Format needed<br>• Used for ‘on the fly’ reporting | • NOTE: Ad Hoc reports are best suited for ‘super-users’ who have an understanding of the underlying data. |

# Strengths and Weaknesses

- Portlets
- Jaspersoft Studio Reports
- Jaspersoft Ad-Hoc
- Jaspersoft Dashboards
- Enterprise Reporting – Tableau, Qlikview, Cognos, etc.

# Flexibility vs Effort 2016 - 2017



# Report Delivery – Open Mic

- How do your executives want to consume information?
  - PDF
  - Ipad
  - Phone
  - Web App
  - Sharepoint
  - Email

# Coming to a CA PPM Instance Near You…


- New set of APIs that would allow direct connection to CA PPM by reporting tools, even for SaaS customers
- Most likely to be released in June/July timeframe
- Not of lot of details right now on what you'll be able to do, and what data will be accessible

# Operations

regoUniversity 2017

Let Rego be your guide.

# Operation Model

### MAINTAINABILITY

Maintainability of reports should be manageable, and the process to introduce new or updated reports and data elements should be clear and follow a set of standards to release these updates to the users.


### INTERACTION WITH TECHNOLOGY

The process defined for working with the Technology team as new requests are received

### DAY TO DAY SUPPORT

Day to Day support for the end users to address new requests in reporting, as well as answer reporting questions.

### RELEASE STRATEGY

The process followed to release new or updated functionality, including the standard development lifecycle

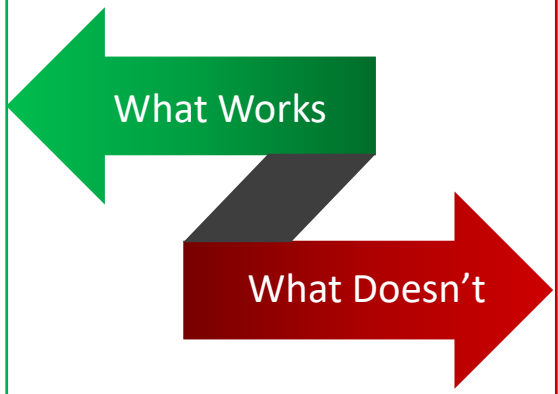
# Best Practices

regoUniversity 2017

Let Rego be your guide.

# Best Practices

- With any report, identify the top question(s) that the report should answer
- Use the right report technology for the job (Portlets, Jaspersoft, Enterprise, etc..)
- Converting excel reports that are already operationalized and moving them into the tool can gain big benefits
- Automation of report delivery
- Having leadership adopt the tool and utilize the tool's dashboards (eventually moving away from "receiving" dashboards to "using" dashboards)
- Ensure that the reports are designed for ‘Easy Reading’
- Ensure the data definition of data is the uniform for all reports
- Unless you have a Business Objects license outside of CA PPM, don’t continue to invest in that platform



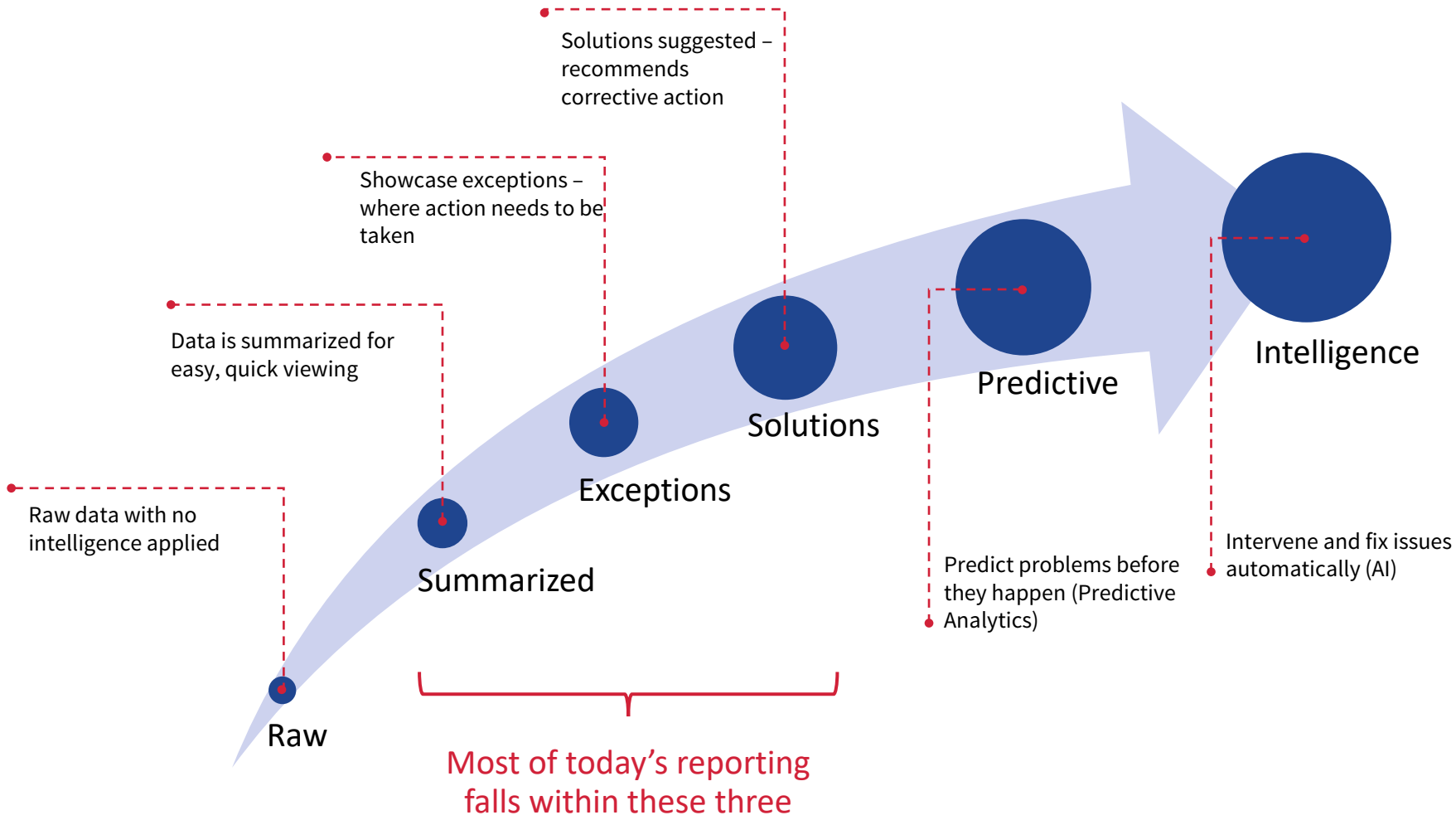

- Having people go into the tool to pull out extracts and fish for the data
- Developing reports that have too many data columns, which can cause the report to lose it’s purpose
- Having scenarios where the user is taking a report from the system, copying and pasting parts of it into a ppt/excel, and generating another report outside of the tool
- Creating different versions of the same report for different business units. This should be handled with thoughtful filters
- Creating reports with data that is inconsistent with other systems, and not having a clear understanding of ownership of data

# Evolution of Reporting Intelligence

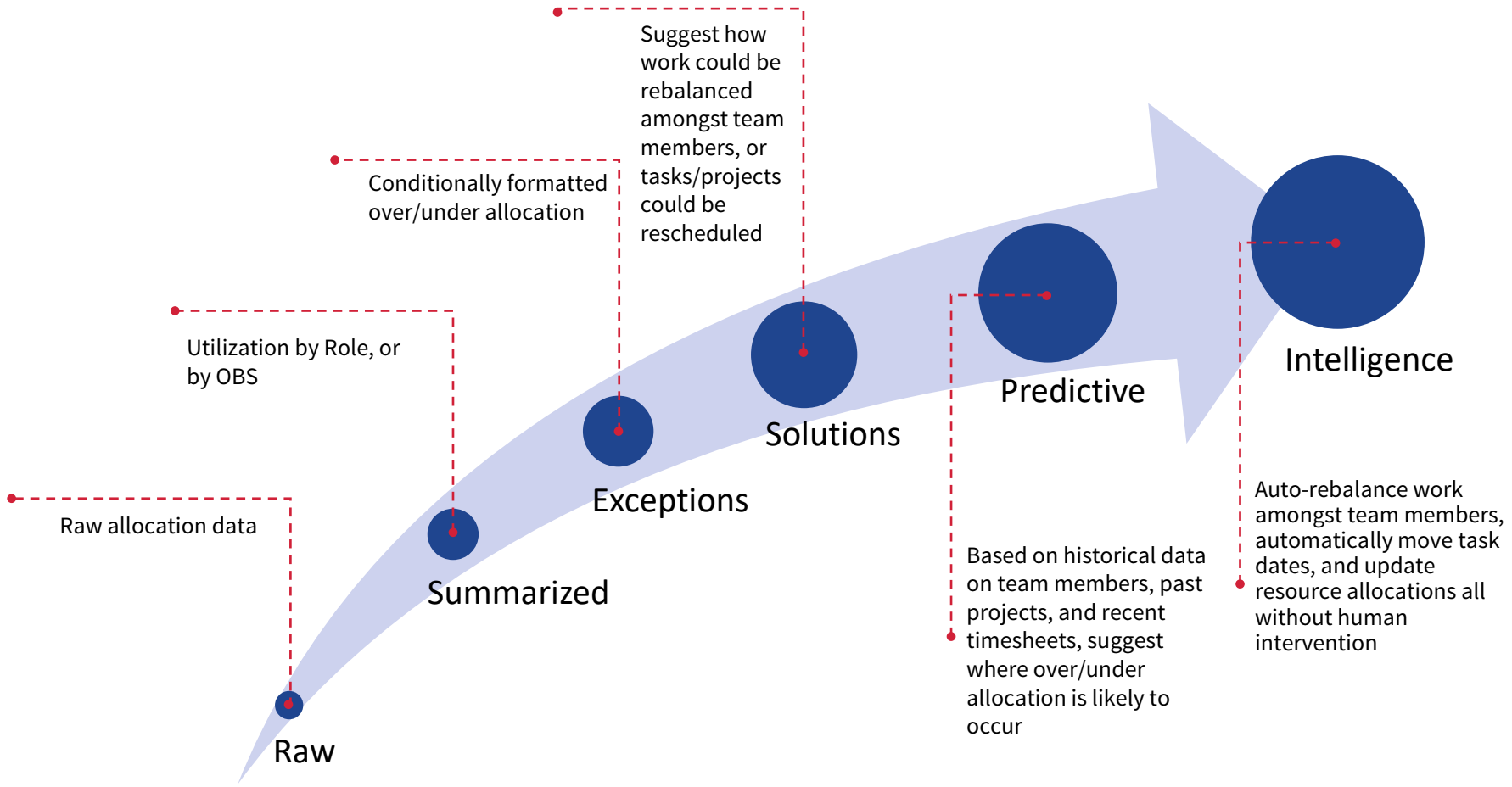
regoUniversity 2017

Let Rego be your guide.

# Evolution of Reporting Intelligence



# Example: Resource Allocations



# Questions?

regoUniversity 2017

Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button

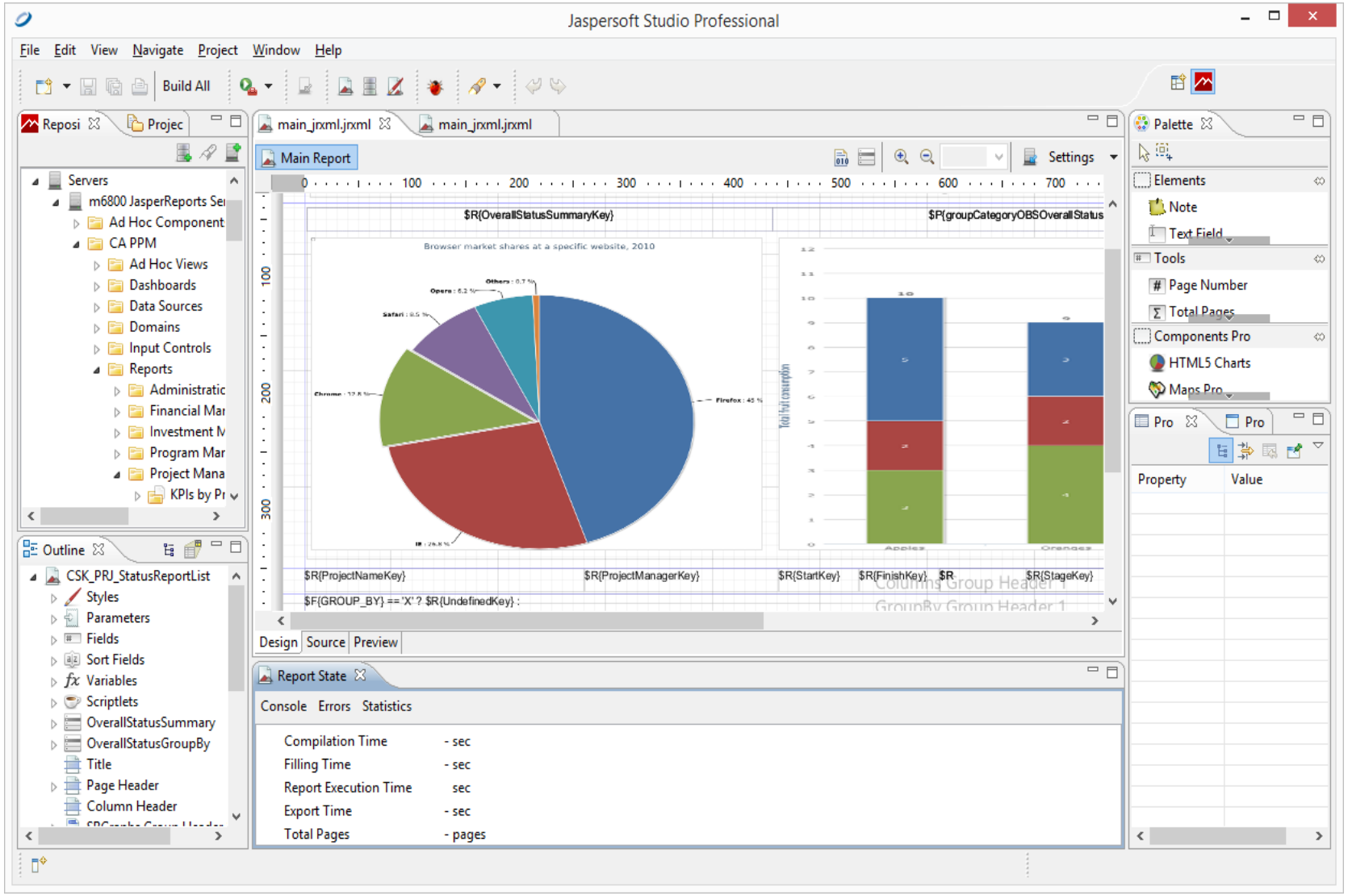
Let us know how we can improve!
Don't forget to fill out the class survey.

**Phone**
888.813.0444

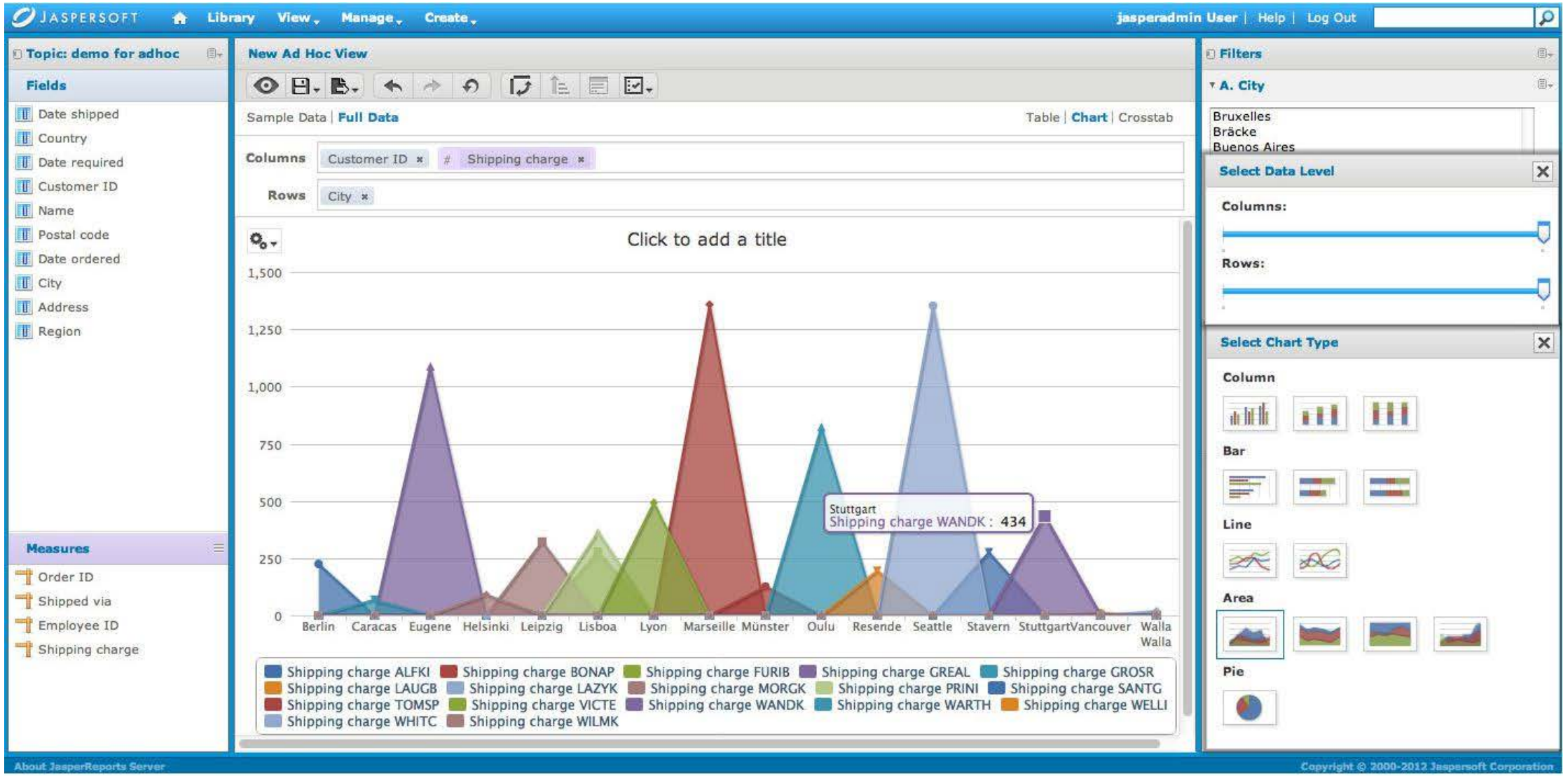
**Email**
info@regouniversity.com

**Website**
www.regouniversity.com

# Jaspersoft Studio Reports



# Jaspersoft Ad-Hoc



# Jaspersoft Dashboards