



regoUniversity 2019

SAN DIEGO

## Reporting | Strategies

Your Guides: Robert Newell and Wes McCoubrie

# Introductions

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



# Agenda

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- Reporting Strategy Introduction
- CA PPM Reporting Options
- External BI Tools / Use With CA PPM
- Best Practices

# Reporting Strategy Introduction



Let Rego be your guide.



# Open Mic

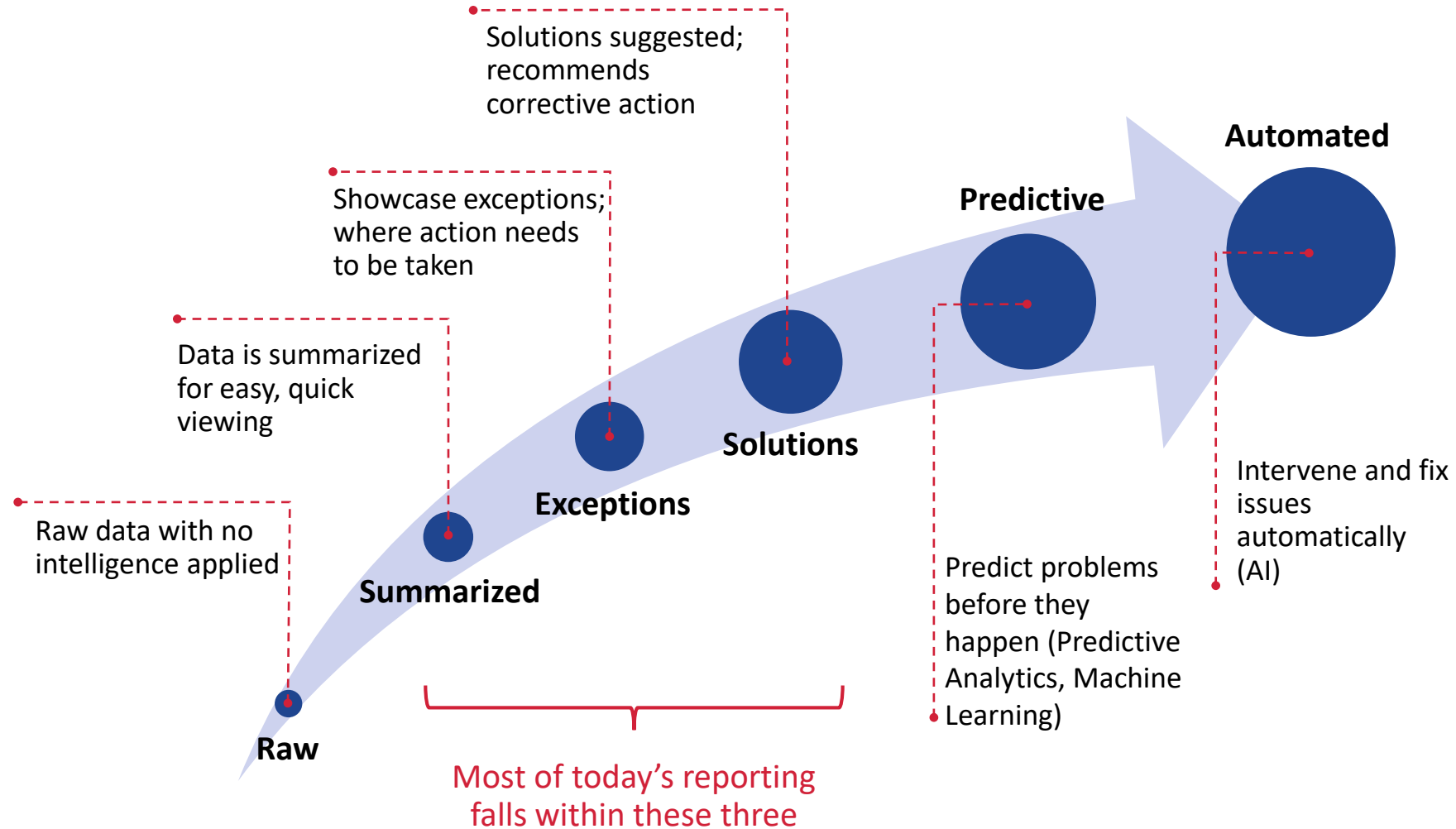
- What are your biggest concerns when it comes to reporting in your organization?
- Is there more than one source for the same information?
- Do your users utilize the reports available?

# Industry Trends & The Future of BI

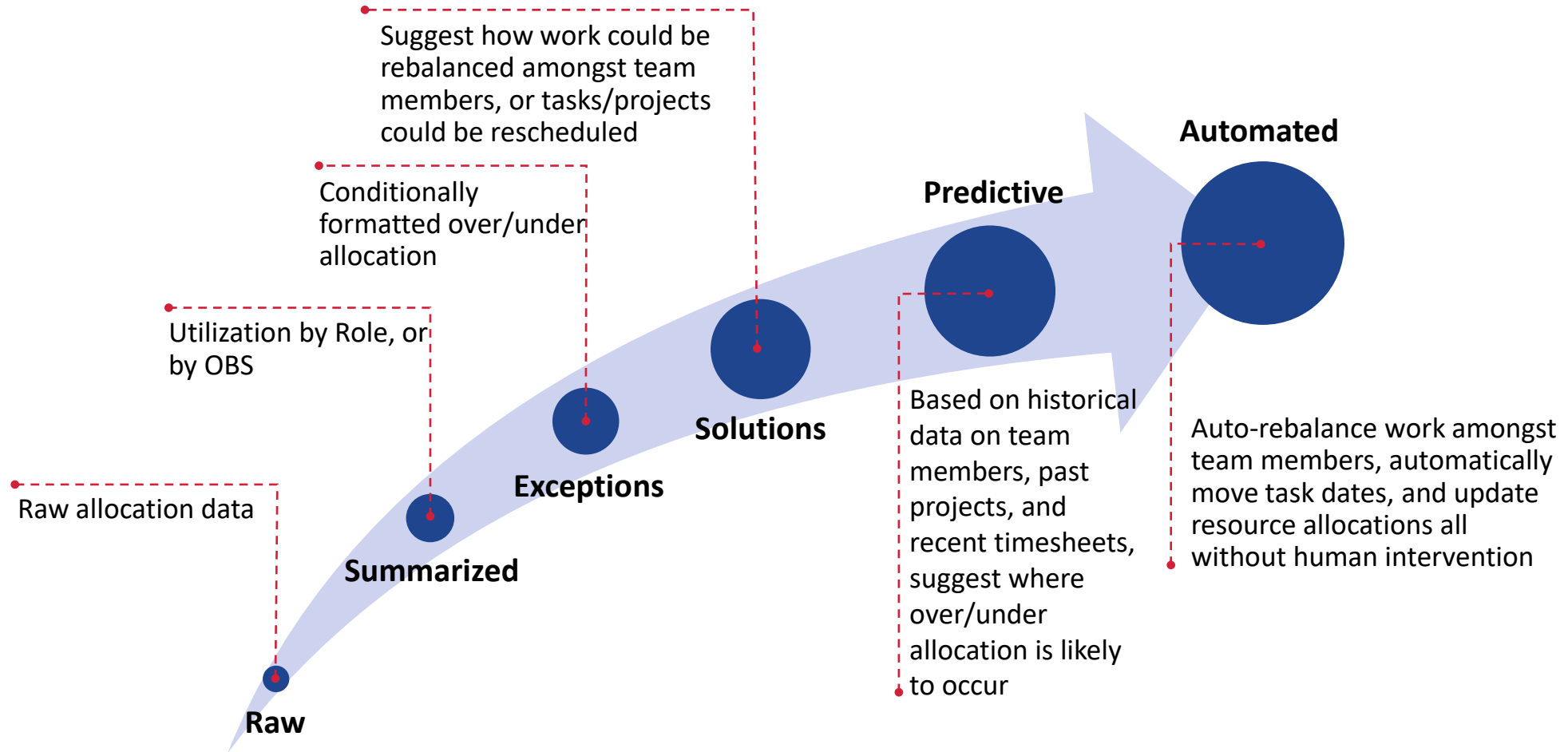
- Citizen Data Scientist/Analyst/Engineer
  - By 2021, 69% of employers will demand data science and analytics as a critical skill set of job candidates. (PWC)
- Chief Data Officer (CDO)
  - By 2019, 90% of large companies will have a CDO role in place. (Gartner)
- NLP – Natural Language Processing / AI
  - By 2020, natural-language generation and artificial intelligence will be a standard feature of 90% of modern business intelligence platforms. (Gartner)
- Augmented Analytics
  - Machine Learning
  - Augmented data preparation
  - Visual-based data discovery
  - Automated advanced analytics
  - Natural Language Processing



# Evolution of Business Intelligence



# Example: Resource Allocations



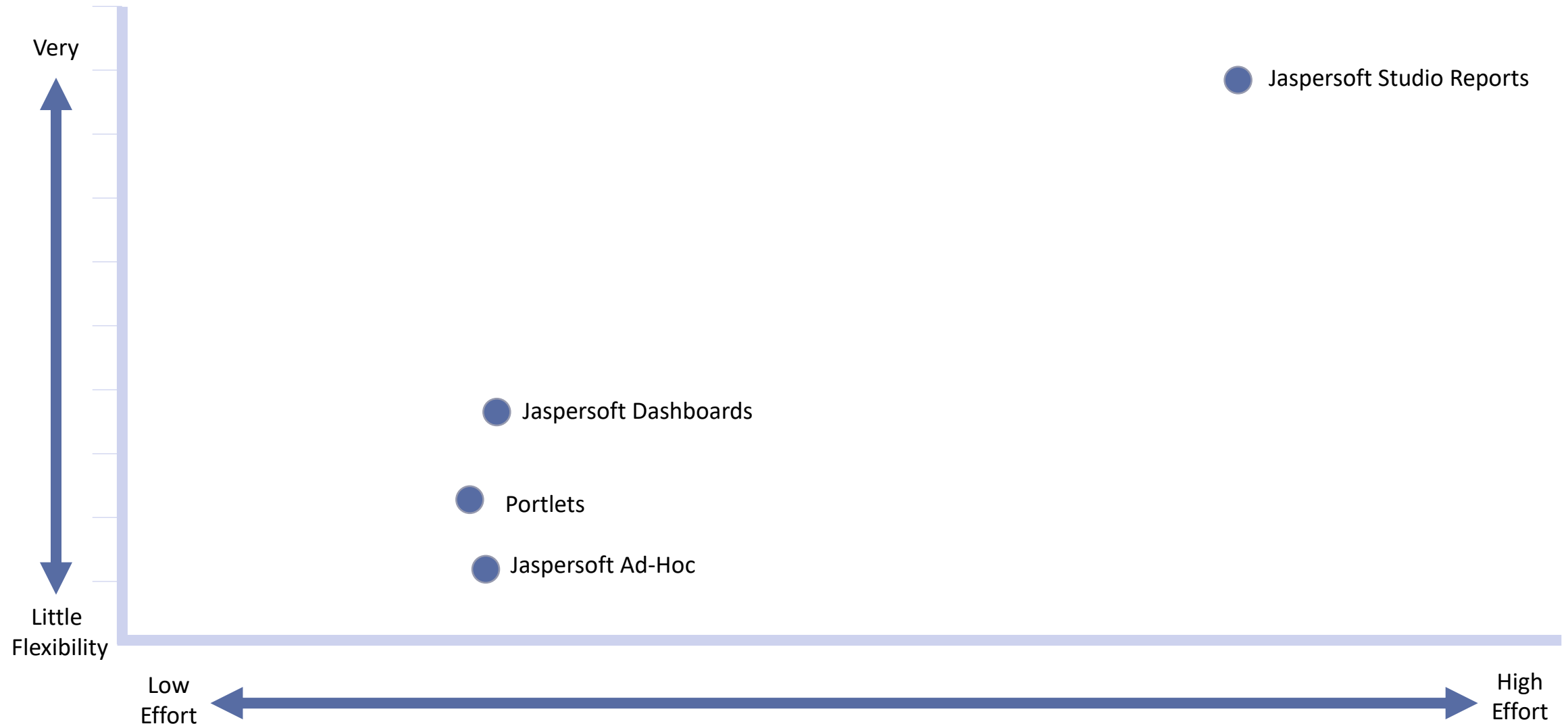


# CA PPM Reporting Options



Let Rego be your guide.

# OOTB Reporting Tool - Flexibility vs Effort



# OOTB Reporting Tools

## Portlets



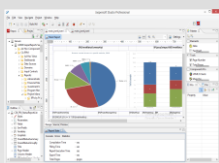
- Data wholly resides in Clarity
- Reports are operational, used day to day.
- Data is rendered within acceptable performance thresholds
- The data does not need to be accessed by non-clarity users
- The number of data elements required does not negatively affect the usability.
- Personalization features

## Dashboards (Jaspersoft)



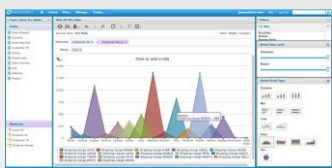
- Summary level information that can be further drilled into
- Dashboards provide an easy-to-read interface
- Dashboards provide interactive viewing, and drill down capabilities

## Studio Reports (Jaspersoft)



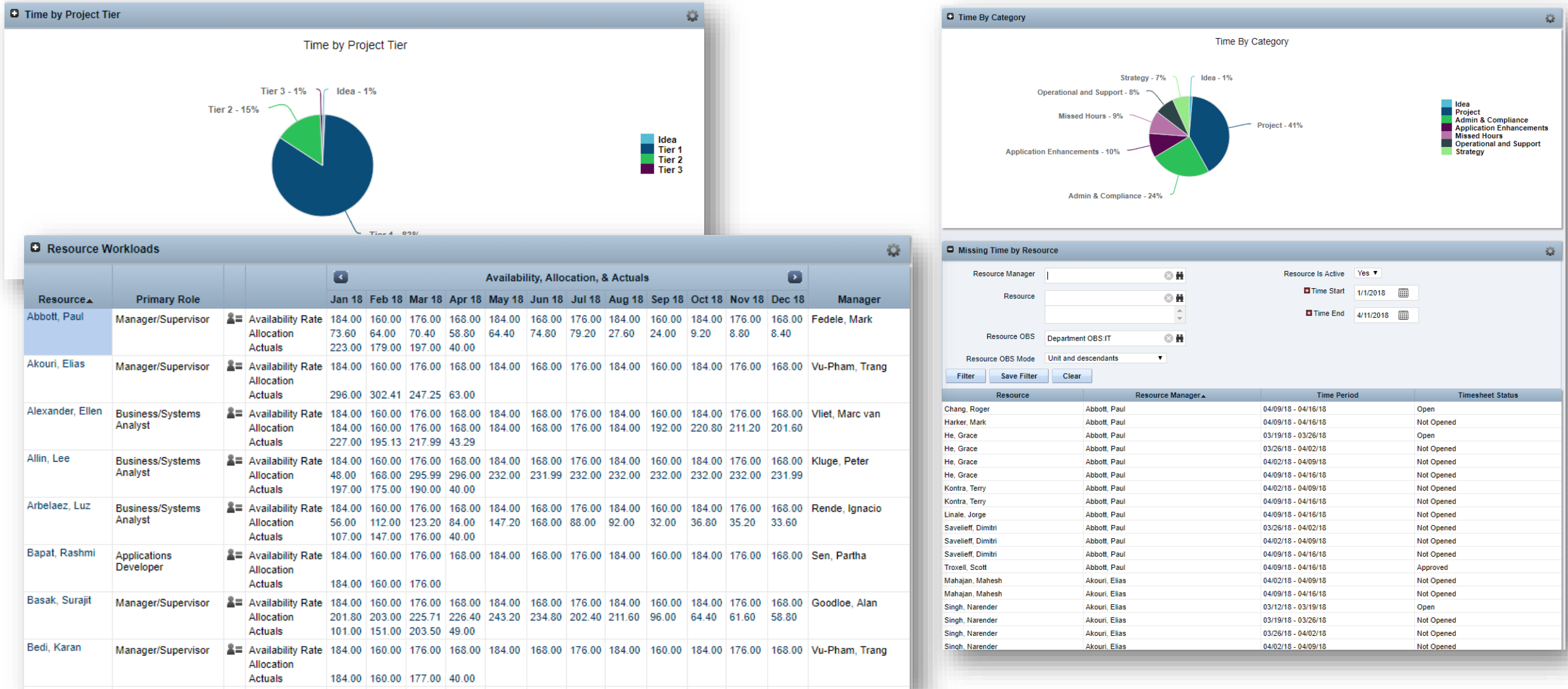
- Data wholly resides in Clarity
- PDF Format needed
- Format requires advanced formatting
- Report access outside of Clarity required
- Archiving is required
- Multiple reports required and presented as a single package
- Large number of calculations

## Ad-Hoc (Jaspersoft)



- Data wholly resides in Clarity
- PDF Format needed
- Used for 'on the fly' reporting
- NOTE: Ad Hoc reports are best suited for 'super-users' who have an understanding of the underlying data.

# Real World Example - Portlets



# Portlets in the Modern UX

- In the Modern UX, custom portlets are – to an extent – being replaced by a heavy focus on personalization.
- Channels still leveraged for classic portlet dashboards.

The screenshot displays a modern UX dashboard with several annotated features:

- Clarity PPM**: The main application header.
- TASKS**: A tab in the top navigation bar.
- TO DO**: A section in the top navigation bar.
- PINNING**: A feature highlighted by a red dashed circle.
- SEARCH OR FILTER...**: A search bar in the top navigation bar.
- SAVED VIEWS & FILTERS**: A feature highlighted by a red dashed circle.
- VIEW Eclipse and eCom...**: A view selector in the top navigation bar.
- Project Name**: A column header in the main table.
- Team Member**: A column header in the main table.
- Start\***: A column header in the main table.
- FLYOUTS**: A feature highlighted by a red dashed circle.
- AUTOSIZE & DRAG/DROP**: A feature highlighted by a red dashed circle.
- CSV EXPORT**: A feature highlighted by a red dashed circle.
- GROUPING**: A feature highlighted by a red dashed circle.
- ONE-CLICK CONFIG**: A feature highlighted by a red dashed circle.
- Cost Plan**: A section header in the bottom table.
- Transaction ...**: A section header in the bottom table.
- PLAN OF RECORD**: A button in the bottom table.
- SHOWING**: A feature highlighted by a red dashed circle.
- VIEW Planned To Actuals**: A view selector in the bottom table.

Project Name	Team Member	Start*
Eclipse Enhancements	Sage Copeland; Sam Rubio; Sara Sumner; Tanner Grant	Mar 14 2019
Eclipse Enhancements	Karl Abbott; Ray Fowler; Rory Walker; Sage Copeland; Sam Rubio; Tanner	Feb 26 2019
Eclipse Enhancements	Dana Lewis; Karl Abbott; Leigh Clark; Rory Walker; Sage Copeland; Sam Rubio; Tanner Grant	Mar 11 2019
Eclipse Enhancements	Grace Thomas; Sage Copeland; Sam Rubio; Tanner Grant	Apr 01 2019

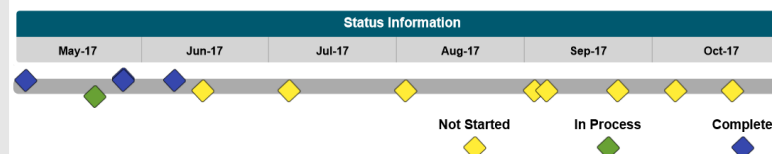
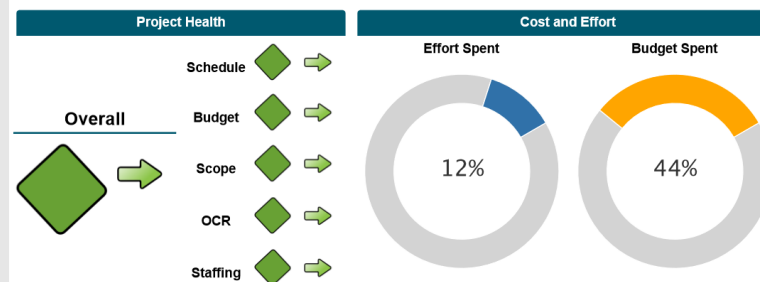
Cost Type	Transaction Class*	2019-01	TOTALS							
		PLANNED	ACTUAL	REMAINING	% SPENT	PLANNED	PLANNED	ACTUAL	REMAINING	% SPENT
Capital		163,960	20,000	143,960	12%	155,1	1,613,520	89,200	1,524,320	6%
	License Costs	62,000	0	62,000	0%	2,0	101,000	0	101,000	0%
	Travel	60,000	0	60,000	0%	2,0	60,000	0	60,000	0%
		2,000	0	2,000	0%	2,0	41,000	0	41,000	0%
Operating		101,960	20,000	81,960	20%	153,	1,512,520	89,200	1,423,320	6%

# Real World Example – Jaspersoft Studio Reports

## AMERICAN EAGLE Primary Team Forecast Vs Budget Review (Capital Only)

Project Code	Project	Project Manager	Capital Forecast	Capital Budget	Capital Actual
IT_116_ARIBA	ARIBA RE-IMPLEMENTATION	Richards, Daly			
AED_ATG_2017	ATG 11.2 UPGRADE / KLO	Louie, Patricia			
AED_Chatbots_17	CHATBOTS	Bell, Heather			
AED_PTC_2017	CHECKOUT & PAYMENT				
AED_CICD_2017	CI/CD				
AED_CRM_2017	CRM / DATA				
AED_DBA_2017	DBA				
AED_SYSTEMENG17	DIGITAL INFRASTRUCTURE				
AED_CLOUD_2017	ENVIRONMENTS				
AED_FLEXFILL_17	FLEXIBLE FULFILLMENT				
AED_HERITAGE17	HERITAGE COMMERCE PLATFORM DISCOVERY				
AED_INNOVAT_17	INNOVATIONS / IN STORE TECHNOLOGY				
AED_LOYAL_HUB17	LOYALTY & ACCOUNT MANAGEMENT - HUB				
AED_LOYAL_POS17	LOYALTY & ACCOUNT MANAGEMENT - POS				
AED_LOYAL_STE17	LOYALTY & ACCOUNT MANAGEMENT - SITE				

### 2017 - Enterprise Insights Foundation (HANA EDW)



#### Key Accomplishments

- Conducted Wave 0 Test Cycle kickoff
- Continued work on finalizing Wave 1 requirements
- Conducted alignment checkpoint with Masterdata Governance
- Production system build complete and cutover plan provided to team
- First communication from SC drafted and submitted for Sponsor approval

#### Project Information

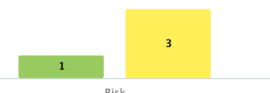
**Contact** Palicki, Matthew

**Finish Date** February 28, 2018

#### Status Report Update

Testing for Wave 0 deliverables has kicked off with expected completion and subsequent go-live in PROD by end of week 12-June. Concurrently, Wave 1 requirements are being finalized and prepared for sign-off. Communications continue to be developed along with plans for next Steering Committee (SC) update and demonstration of functionality by the Business Leads.

#### Active Risks, Issues, & Change Requests



#### Upcoming Activities

- Complete Wave 0 testing and promote to PROD upon signoffs
- Obtain signoff on Wave 1 requirements and commence build
- Distribute first communication through the SC
- Schedule next SC update (week of 10-July) and begin preparing for demo

AMERICAN EAGLE

### Corporate Portfolio Status Update

11 April 2018

	High confidence the defined goal will be achieved.		Issues occurring for which the owner has an agreed plan necessary for bringing status back to green by a defined date/event.		Issues occurring for which there is no defined plan to bring status to Yellow. Owner is responsible for driving status to Yellow and for requesting and gathering support from everyone necessary across the business to do so in the most appropriately expeditious manner.		Project is completed. No Status to report.
--	--	--	--	--	--	--	--

#### Feature Summary

Feature	Project Manager	Phase	Targeted Release	Overall Status	Executive Summary	Cost & Effort	Schedule	Scope	Spend to Date	2018 Budget	Status Report Date
	McClain, Keisha				The focus is completing QE for Milestone 1, continuing development and QE on Milestone 2. Requirements walkthrough is occurring for Milestone 3.				\$0		23 January 2018
	Kumar, Vijay				The team is working on UI and Services for enrollment, profile view, CSR and All Access features. The team did not have environments for testing until 2.20.17, the team is about 4 weeks behind on...				\$0		28 February 2017
					sen finalized, Monthly Demo mode have been finalized, toward Demo2 goals. 2017				\$0		8 February 2018
					In 2018 discussions for on...				\$0		23 January 2018
					activity model went live in 17th timer enabled successfully in				\$0		9 February 2018
					work on the Governance Risk framework				\$0		9 February 2018
					is				\$0		23 January 2018
					Green Week Technical issues. Sections data from 3. Once received, we will and schedule project close				\$0		9 February 2018
					completed on 1/11. Currently for Procure to Pay. Final cost, implementation plan 2/22.				\$0		9 February 2018



# Real World Example – Jaspersoft Ad Hoc

Columns: # Total Actual Hours x Total Allocation Hours x

Rows: Project Name x Project Manager x Start Date x Finish Date x

Click to add a title

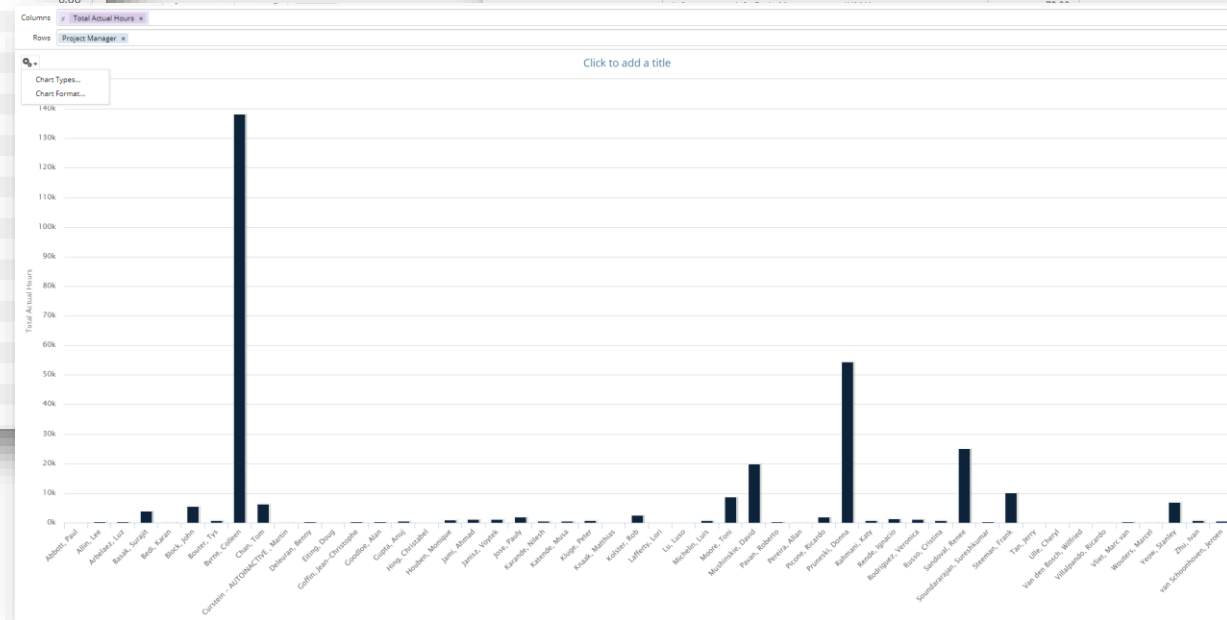
Project Name	Project Manager	Start Date	Finish Date	Total Actual Hours	Total Allocation Hours
(DELETE) Qualify America Renolit to replace Nanya (Calendared High Gloss)	Zalar, Bob	Aug 13, 2013	Aug 14, 2013	0.00	0.00
(hold) 36# Fighter Grade as a lower-cost next generation TT face paper.	Humes - AUTOINACTIVE , Holly	May 30, 2013	Jun 1, 2013	0.00	0.00
(hold) AD private label - Kimdura Fighter spec	Blackwell, Chris(deact)	Mar 1, 2013	Mar 4, 2013	0.00	0.00
(hold) Add our own nucleator at EFP	Blackwell, Chris(deact)	Jul 11, 2013	Jul 12, 2013	0.00	0.00
(hold) Exploration of using PET face instead of BOPP for beer/beverage	Blackwell, Chris(deact)	Jun 27, 2013	Jun 28, 2013	0.00	0.00
(hold) Extrude our own PET liner	Blackwell, Chris(deact)	Jul 11, 2013	Jul 12, 2013	0.00	0.00
(hold) Flame Treat @ EFP for cost savings	Blackwell, Chris(deact)	Jul 10, 2013	Jul 12, 2013	0.00	0.00
(hold) Tie Coat Weight Reduction	Klich, Paul	Feb 26, 2013	Feb 27, 2013	0.00	0.00
(hold) White PVC Shrink film replacement	Blackwell, Chris(deact)	Aug 13, 2013	Aug 14, 2013	0.00	0.00
(hold) iAlternative EFP formula (formulate on more PE vs PP resins)	Blackwell, Chris(deact)	Jun 27, 2013	Jun 28, 2013	0.00	0.00
*Copiers for Glendale Office (Value Summit)	Rodriguez - AUTOINACTIVE , Johanna	Jan 1, 2015	Dec 31, 2015	0.00	0.00
*DUPLICATE*Compounding 2.0 in Alphen - MES Integration (ADU)	Huizinga, Frank	Jan 1, 2018	Dec 31, 2018	0.00	0.00
*Level 3 Rate Reductions	Rodriguez - AUTOINACTIVE , Johanna	Jan 1, 2015	Dec 31, 2015	0.00	0.00
*VMWare Maintenance Rate Reductions	Rodriguez - AUTOINACTIVE , Johanna	Jan 1, 2015	Dec 31, 2015	0.00	0.00
*Vodafone Rate Reduction - The Netherlands (Value Summit)	Rodriguez - AUTOINACTIVE , Johanna	Jan 1, 2015	Dec 31, 2015	0.00	0.00
,Qualify Catalyst for 54# Semi Gloss Face	Messer, Kelli Jo	Apr 20, 2016	Feb 23, 2021	0.00	0.00
0002- fasson.com Claim Changes	Ulle, Cheryl	Oct 3, 2014	Dec 8, 2014	0.00	0.00
0033-CLS Gross and Net Wt Maintenance on Invoice	Sadekar - AUTOINACTIVE , Jyoti	Jun 12, 2014	Sep 29, 2014	0.00	0.00
0034-CLS Additional lines in order comments	Sadekar - AUTOINACTIVE , Jyoti	Jul 1, 2014	Jul 4, 2014	0.00	0.00
0043-3112 - Analyze Dual Entry	Beres, John	Mar 24, 2014	Oct 3, 2014	0.00	0.00
0045-3114 Claim Entry Modification	Ulle, Cheryl	Mar 10, 2014	Apr 10, 2015	0.00	0.00
0073-3561 - Update apps.fasson.com Header	Ulle, Cheryl	May 12, 2014	Oct 3, 2014	0.00	0.00
0074-3562 - Convert Sample Requests into Opportunities ...	Merritt - AUTOINACTIVE , William	Apr 15, 2014	Aug 4, 2014	0.00	0.00
0093-3578 - Product Finder Data Automation	Caldwell - AUTOINACTIVE , Brian	Feb 1, 2014	Mar 31, 2015	0.00	0.00
0137-Colombia Transfer Price - Proposal for 2014	Ulle, Cheryl	Jul 22, 2014	Nov 21, 2014	0.00	0.00
0186-Support Sales Realignment	Ulle, Cheryl	Jun 27, 2014	Aug 8, 2014	0.00	0.00
0242 - CR - DW - Sales Realignment - Display Team Members from Table 54	Ulle, Cheryl	Jun 27, 2014	Aug 22, 2014	0.00	0.00
0253 - PTC Metrix on the Go	Patel, Bhavna	Jun 2, 2014	May 7, 2015	0.00	0.00
0262- ROCCA Process Realignment/ training	Ragupathi, Senthil	Aug 4, 2014	Jan 16, 2015	0.00	0.00
0263- PT Salesforce.com Cleanup / Strategy	Ragupathi, Senthil	Aug 15, 2014	Feb 28, 2015	0.00	0.00
0264- PT ERP Hi-Level Requirements	Ragupathi, Senthil	Apr 9, 2014	Oct 10, 2014	0.00	0.00
0310- SFDC Dataloader Replace Windows XP PC with new solution	Ragupathi, Senthil	Sep 19, 2014	Nov 20, 2014	0.00	0.00
0317 - New Label format for Walnut Industries	Ragupathi, Senthil	Sep 19, 2014	Nov 7, 2014	0.00	0.00
0341- Salesforce Opportunity to Case Synchronization	Ragupathi, Senthil	Oct 9, 2014	Jan 23, 2015	0.00	0.00
0362- Continuous Improvement IT Request Life Cycle	Ragupathi, Senthil	Oct 1, 2014	Dec 31, 2014	0.00	0.00
0366 Dual Order Entry	Ulle, Cheryl	Nov 19, 2014	Jun 1, 2015	18.00	0.00
0371- RFID Opportunities at PTC	Knaak, Matthias	Nov 5, 2014	May 20, 2016	0.00	0.00

Columns: # Total Actual Hours x Total Allocation Hours x

Rows: Project Manager x Project Name x

Click to add a title

Project Manager	Project Name	Total Actual Hours
Abbott, Paul	Driving SFDC Effectiveness	25.00
Allin, Lee	Transship functionality	425.00
Arbelez, Luz	Travel & Expenses System - South America	458.00
Basak, Surajit	AP BI Program / Project CPMO	196.00
	AP BI Program / Project Finance B	119.50
	AP BI Program / Project Finance - Part A	1,506.00
	BI - AP BI Program (Phase -II - Scrap)	940.50
	LA BI Program 2018 / Scrap Analytics	1,221.00
	PoC with Linux and Tm1/Expense	62.50
Bedi, Karan	MES Europe - Risk Remediation	173.00
	Optio to Transform migration	1.00
	Upgrade WebSeal for EU Commerce	17.00
Block, John	2017 PC refresh - (LGM-NA Resource Cost Only)	1,159.50
	Enterprise SIS Project Support - NA	324.58
	Growing Google - Chromebook Pilot & Deployment	227.92
	Growing Google - MS Office Upgrade - IHM-Global	90.50
	Growing Google - MS Office Upgrade - LGM-NA	317.95
	Infrastructure Life Cycle Management - IHM - PT	48.50



# Recent Jaspersoft Improvements

- 15.3
  - Re-Introduction of Reports and Jobs – moving the ability to quickly access and schedule reports out of the Advanced Reporting link
  - Ability to have “My Reports” again
  - Jaspersoft reports now utilize the Parameters native to CA PPM
  - The ability to run a report via the *Actions* menu on an Object is back
- 15.4
  - New version of Jaspersoft (6.4.2)
  - Running reports via Reports / Jobs output can now output to XLS (previously just ppt and pdf)
  - Dashboard enhancements
- 15.5.1
  - New version of Jaspersoft (7.1)
  - New Roadmap Timeline report
- 15.6
  - New trending reports

# External BI Tools



Let Rego be your guide.

# 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.
- Gartner magic quadrant BI platforms include:
  - Microsoft PowerBI
  - Tableau
  - Qlik View
- If you are an on premise implementation you can connect directly to the built-in data warehouse
- If you are a SaaS implementation, you have several options for connecting:
  - Flat file extracts & report directly against files
  - Flat file or API-based extracts loaded into on-premise or cloud database (3<sup>rd</sup> party ETL tools help)
  - OData Connection

*NOTE: Recommended to use Power BI, as OData support in Tableau and Spotfire is limited*



# OData Direct Connection



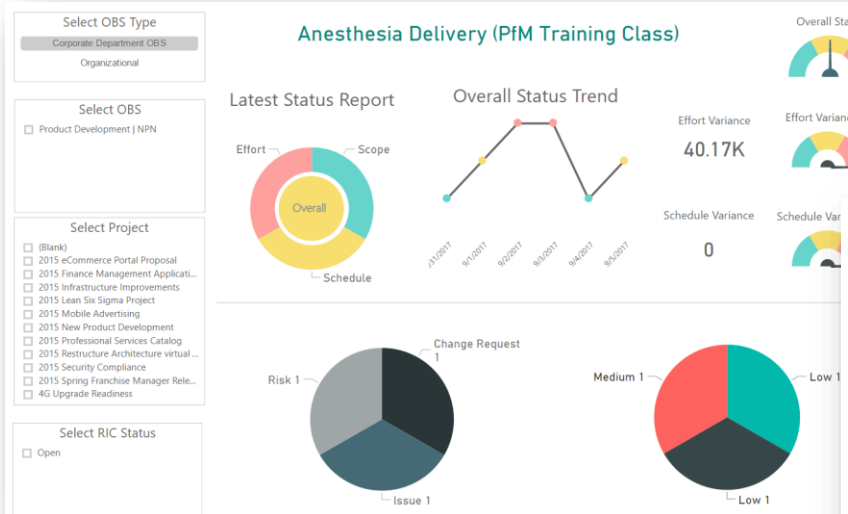
- As of 15.3, on Demand customers have the ability to use an OData connector to point a BI tool at the CA PPM DWH. This will enable the use for Spotfire, Tableau, PowerBI, QlikView, etc
- The connector will only go against the updated Data Warehouse
- The connector was optimized to work with PowerBI, but can be used with other reporting BI tools – even Microsoft Excel

*NOTE: Recommended to use Power BI, as OData support in Tableau and Spotfire is limited*

- Row level security possible with custom BI User ID on the CA PPM Resource
- In 15.4, CA added the ability to have individual logins for OData access

# Real World Example - PowerBI

20



Investment ID	Investment Name	Risk Name	Investment Manager	Risk ID	Owner	Status	Priority	Target Resolution Date
PN1011	Anesthesia Delivery (Pm Training Class)	Test Risk Objectives	Tennison, Peter	RS1077	Joshi, Navdeep	Open	Medium	Friday, October 23, 2015
PR1016	Automated Security Enhancements	Key Resource not available	Berks, Paul	RS1073	Administrator, System	Open	High	Saturday, October 10, 2015
PR1052	Test-MK	Requirements to be freed on time	Administrator, System	RS1074	Administrator, System	Open	High	Tuesday, October 13, 2015
PR1052	Test-MK	Resource availability	Administrator, System	RS1075	Administrator, System	Open	Medium	Tuesday, October 13, 2015
PR1083	JH Project-Financial Mgmt Overview	Risk 1	Hoaldrige, Jon	RS1082	Hoaldrige, Jon	Open	High	Thursday, February 11, 2016
PR1083	JH Project-Financial Mgmt Overview	Risk 2	Hoaldrige, Jon	RS1083	Hoaldrige, Jon	Closed	Low	Thursday, February 11, 2016
PR1114	Bigfish Automation (Pm Training Class)	may run over allocated budget	Scarlato, Jennifer	RS1084	Calderon, Mindy	Open	High	Friday, June 3, 2016
PR1165	CLR Demo Project	new risk	Rice, Christi	RS1085	Rice, Christi	WIP	Medium	Monday, April 24, 2017
PR51000	A Fantastic Project (Pm Training Class)	High Risk Sample	Flanagan, Christopher	RS1080	Administrator, System	Open	High	Tuesday, November 10, 2015
PR51000	A Fantastic Project (Pm Training Class)	Low Risk Sample	Flanagan, Christopher	RS1078	Administrator, System	Open	Low	Tuesday, November 10, 2015

## Adams, Benjamin

TASK_NAME	ASSIGNMENT...	START_DATE	FINISH_DATE
Barney Enhancements (Pm Train...	Not Started	01-Jan-13	29-Dec-17
MRI Redesign	Not Started	02-Apr-15	10-May-19
Ultrasound V5010 Project	Not Started	08-Apr-15	17-Jul-18
Idea Evaluation	Not Started	15-Apr-15	24-Jul-18
Defibrillator Improvements	Not Started	17-Apr-15	27-Jul-18
Ultrasound V5010 Project	Started	01-Jun-15	17-Jul-18
Crusader Photogrammetry and 3...	Not Started	01-Oct-15	01-Jun-18
Deepmind Augmented Reality a...	Not Started	01-Oct-15	31-Dec-19
Odyssey (Pm Training Class)	Not Started	01-Oct-15	31-Dec-19
Cloud Pathfinder (Pm Training C...	Not Started	01-Jan-16	29-Dec-17
Ira Upgrade (Pm Training Class)	Not Started	01-Jan-16	01-Jun-18

Issues	Risks	Demands
5	11	110

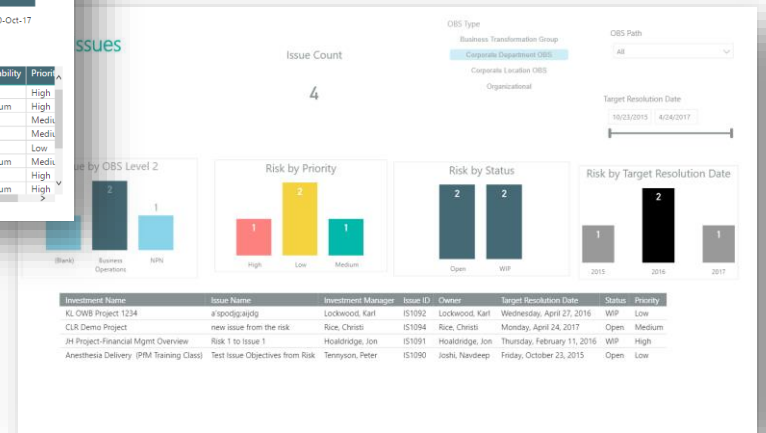
Investment ID	Issue ID	Issue Name	Target Resolution Date	Probability	Priority
PR1052	IS1089	Requirements to be freed on time		Low	Low
PN1011	IS1090	Test Issue Objectives from Risk	23-Oct-15		Low
PR1083	IS1091	Risk 1 to Issue 1	11-Feb-16		High
PR1084	IS1092	a1spodgajidj	27-Apr-16		Low
PR1165	IS1094	new issue from the risk	24-Apr-17		Medium

Investment ID	Risk ID	Risk Name	Target Resolution Date	Probability	Priority
PR1016	RS1073	Key Resource not available	10-Oct-15	Low	High
PR1052	RS1074	Requirements to be freed on time	13-Oct-15	Medium	High
PR1052	RS1075	Resource availability	13-Oct-15	High	Medium
PN1011	RS1077	Test Risk Objectives	23-Oct-15	High	Medium
PR51000	RS1078	Low Risk Sample	10-Nov-15	Low	Low
PR51000	RS1079	Medium Risk Sample	10-Nov-15	Medium	Medium
PR51000	RS1080	High Risk Sample	10-Nov-15	High	High
PR1083	RS1082	Risk 1	11-Feb-16	Medium	High

## Late Milestones

Investment ID	Investment Name	Investment Manager	Status	Start Date	End Date	Open Date	Close Date
PR51000	A Fantastic Project (Pm Tr...	Flanagan, Christopher	Not Started	Monday, April 20, 2015	Friday, May 8, 2015	819	38
PR1012	Atropia Retina Scan - Proj...	Miles, Paul	Not Started	Monday, April 13, 2015	Monday, April 13, 2015	844	843
PR1002	Aurascopes XA - Project	Miles, Paul	Not Started	Monday, August 10, 2015	Monday, August 10, 2015	723	724
PR1003	Brighthouse 3000 - Project	Miles, Paul	Not Started	Friday, October 9, 2015	Friday, October 9, 2015	665	664
Diagnostic ECG - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Thursday, September 10, 2015	Thursday, September 10, 2015	694	693
Echo Cardiography 3000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Thursday, September 10, 2015	Thursday, September 10, 2015	694	693
Fluoroscopic Imaging 1000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Molecular Imaging 4000 - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Nunes, Angie	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Molecular Imaging 4000 - ...	Business Case Complete and Go to Development	Nunes, Angie	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Nuclear Cardiology 2200 - ...	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
PET 4x - Project	Business Case Complete and Go to Development	Craig, Allen	Not Started	Tuesday, June 9, 2015	Tuesday, June 9, 2015	787	786
Survea XT - Project	Business Case Complete and Go to Development	Miles, Paul	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Ultrasound V4000 - Project	Business Case Complete and Go to Development	Angelo, Michael	Not Started	Tuesday, August 11, 2015	Tuesday, August 11, 2015	724	723
Ultrasound V5000 - Project	Business Case Complete and Go to Development	Craig, Allen	Not Started	Monday, November 9, 2015	Monday, November 9, 2015	434	433
2015 eCommerce Portal P...	Closing Phase Gate Complete	Arya, Vishal	Not Started	Friday, February 19, 2016	Friday, February 19, 2016	532	531
4G Upgrade Readiness	Closing Phase Gate Complete	Reed, Harry	Not Started	Tuesday, September 15, 2015	Tuesday, September 15, 2015	689	688
Automated Security Enhanc...	Closing Phase Gate Complete	Berks, Paul	Not Started	Thursday, September 17, 2015	Thursday, September 17, 2015	687	686

## Issues



Let Rego be your guide.

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# Best Practice Recommendations



Let Rego be your guide.

# Open Mic

- What is your primary reporting tool? (Portlets, Jaspersoft, PowerBI, Tableau, Others)
- How are reports typical consumed? (Web, Mobile, Email, Print)
- How do your executives want to consume reports?
  - Email
  - Printed
  - Mobile
  - Sharepoint
  - Web



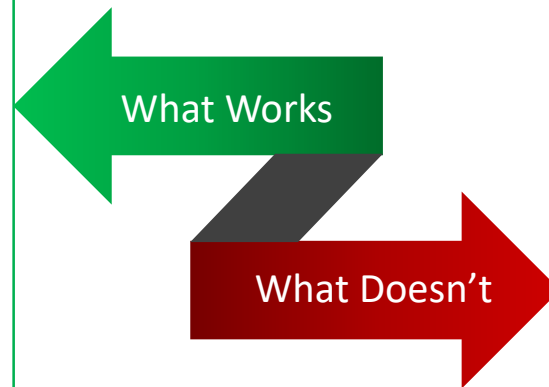
# Diverse Strategy

**In most cases, the reality is not a single reporting solution, but a mix of tools**

- Case 1 (SaaS, 1,000 Users)
  - Portlets – data governance & exception reporting
  - Jaspersoft Ad-Hoc – end user ad-hoc requests, semi-“standard”
  - Enterprise BI (Tableau) – Standard reports / dashboards
- Case 2 (SaaS, 200 Users)
  - Mostly OOTB or RegoXchange portlets and Jaspersoft reports
  - Set of executive-level PowerBI dashboards using OData connection
- Case 3 (On-Prem, 5,000 Users)
  - Built on on-premise DWH. Data extracted from CA PPM, VersionOne, JIRA, ServiceNow, etc.
  - Instead of integrating tools, combined on the reporting side
  - Not a single enterprise BI tool, but tool agnostic – PowerBI, Excel, Cognos all pointing to the same DWH

# 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



- 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 its 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

# Questions?



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