

# Reporting | Strategies

Your Guides: Doug Greer and Atul Kunkulol

# Introductions

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



# Agenda

---

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



# Reporting Strategy Introduction

*rego*University 2018

Let Rego be your guide.



# Open Mic

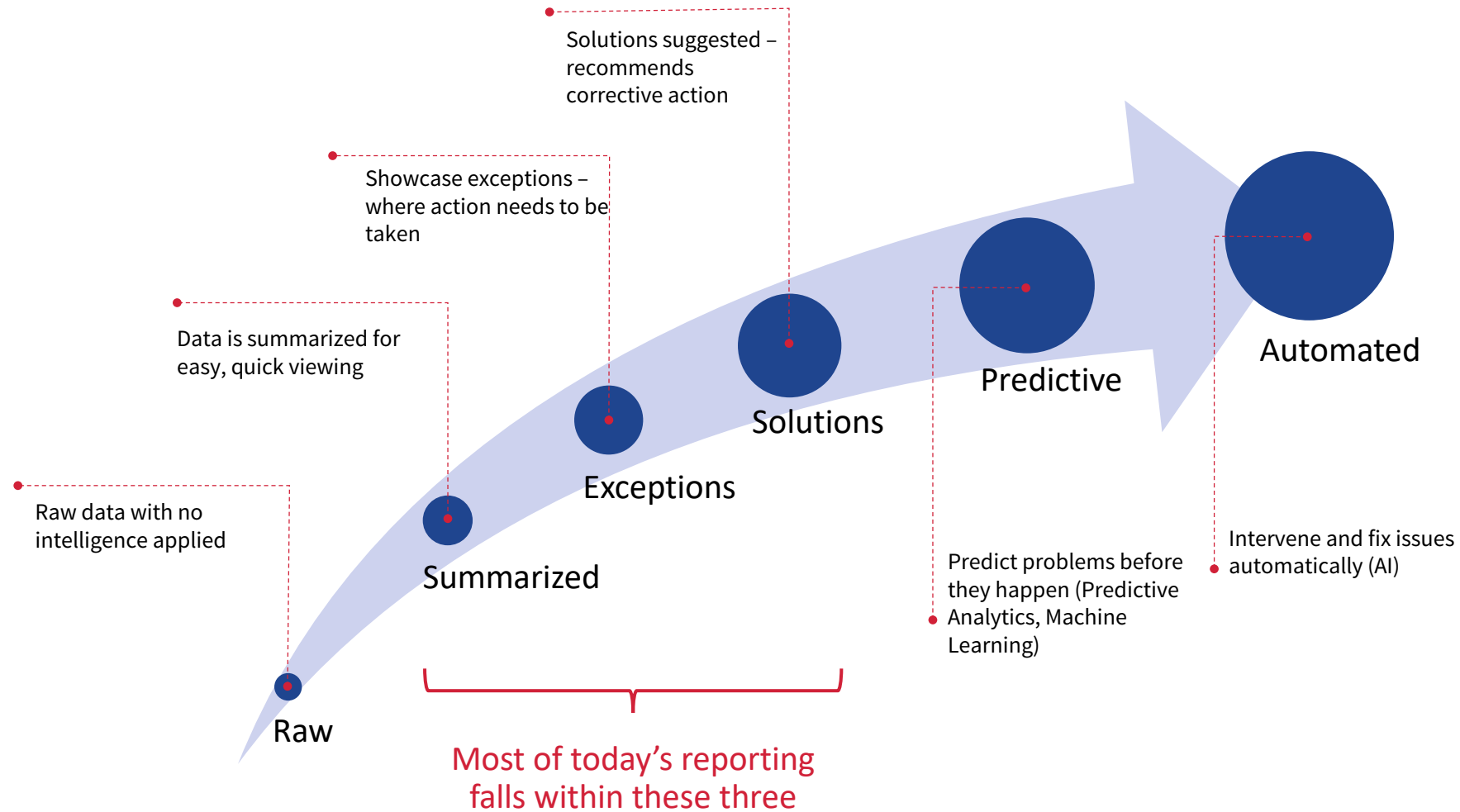
- What are your biggest concerns when it comes to reporting in your organization?
- Is there more than one source for the same information?
- Do your users utilize the reports available?

# 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

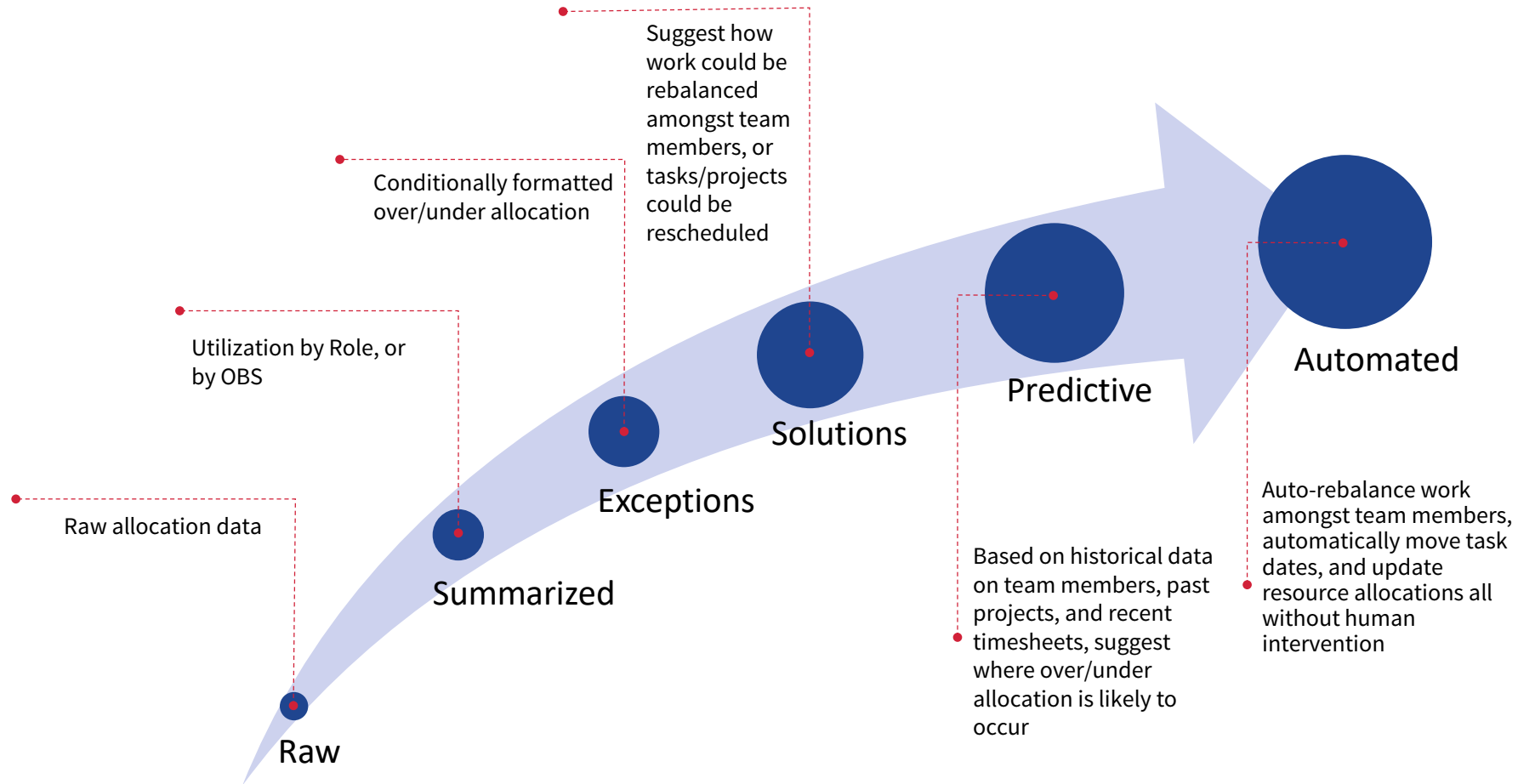


# Evolution of Business Intelligence





# Example: Resource Allocations

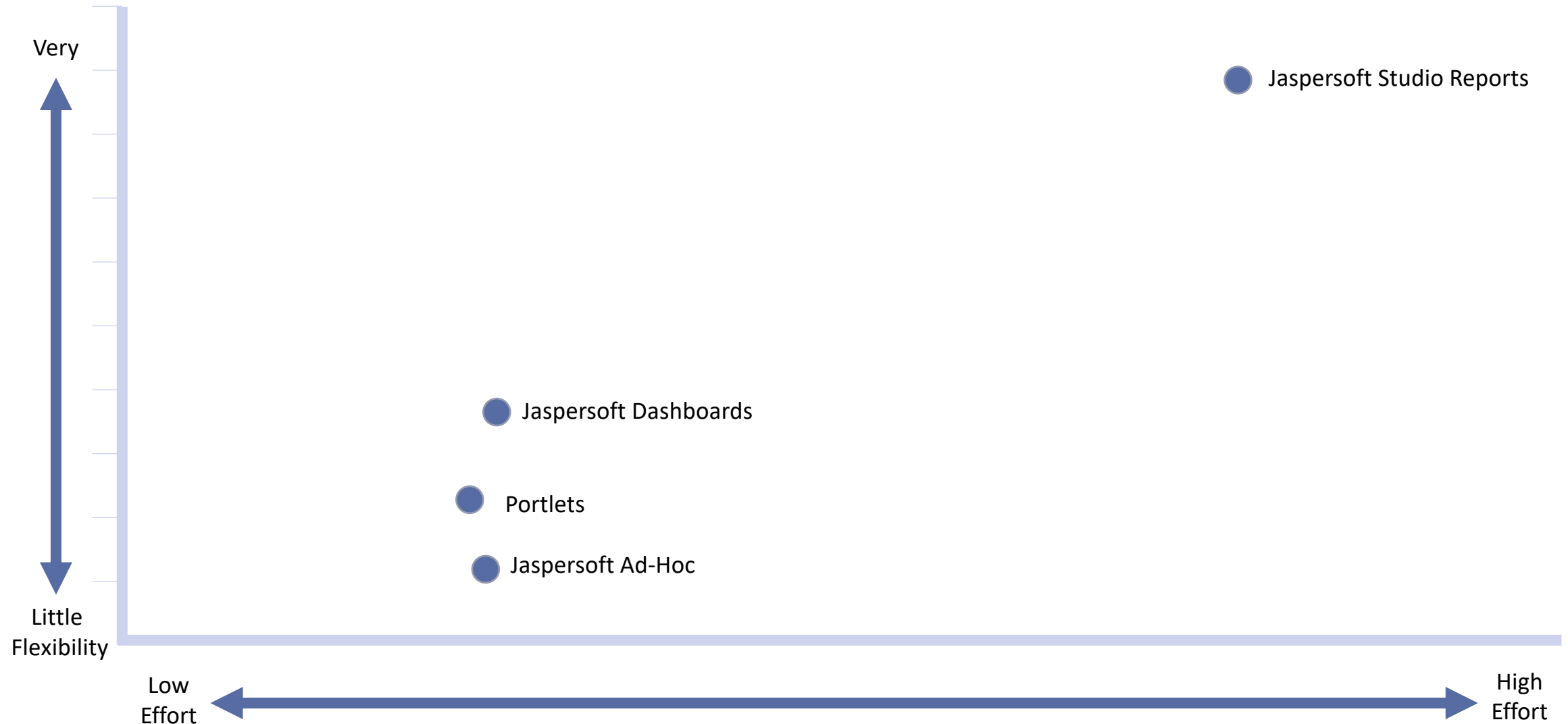


# CA PPM Reporting Options

*rego*University 2018

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.

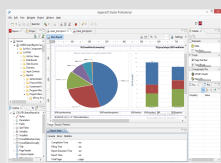
## Dashboards (Jaspersoft)



- Summary level information that can be further drilled into
- Dashboards provide an easy-to-read interface

- Dashboards provide interactive viewing, and drill down capabilities

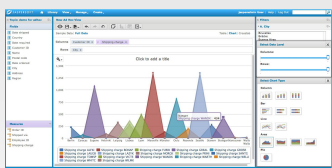
## Studio Reports (Jaspersoft)



- 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

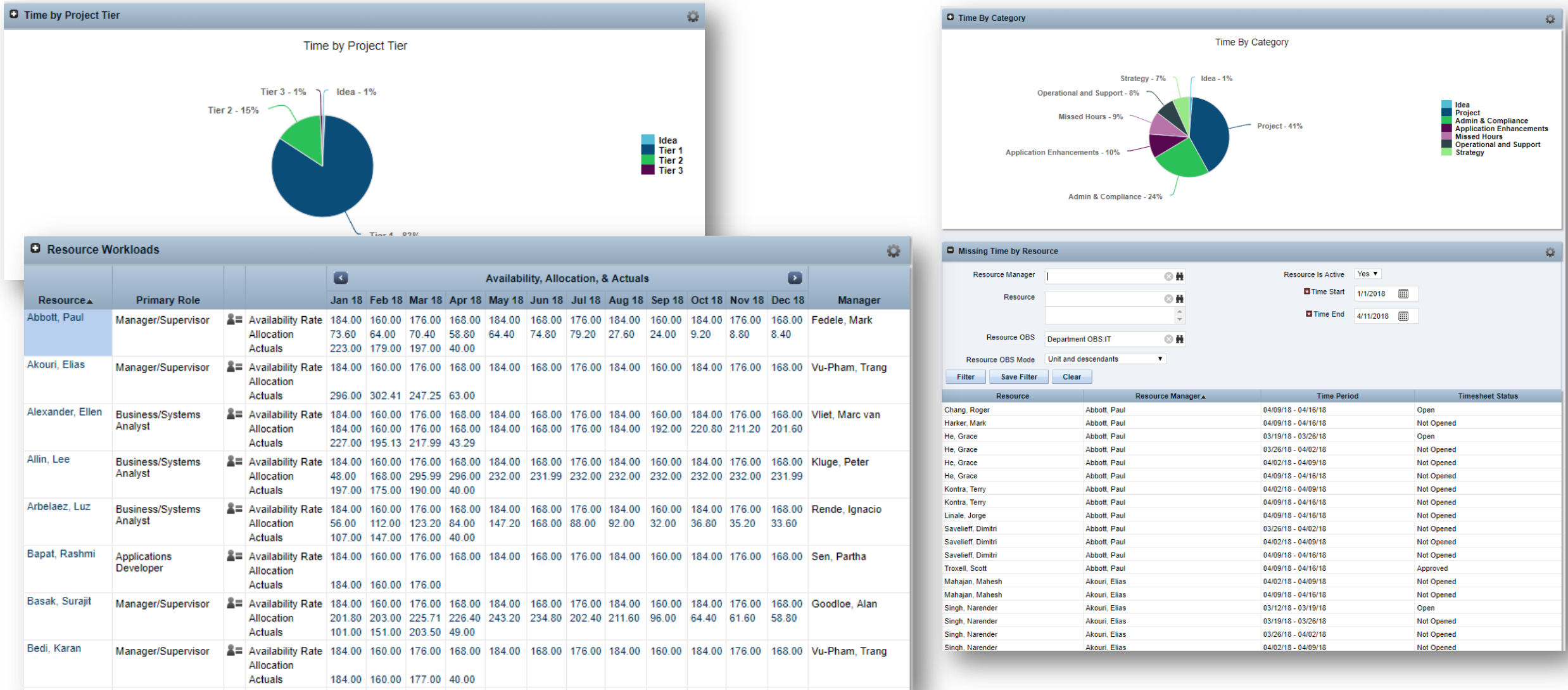
## Ad-Hoc (Jaspersoft)



- 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



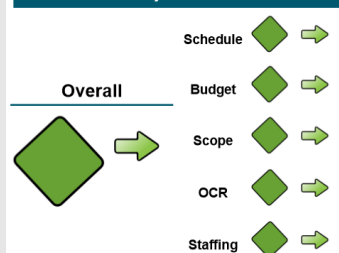
# Real World Example – Jaspersoft Studio Reports

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

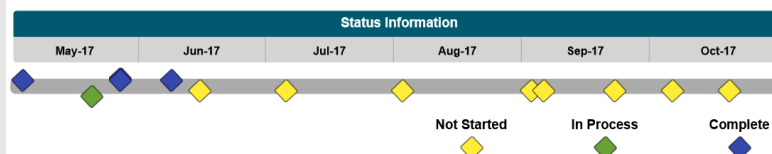
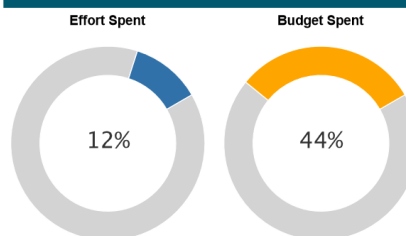
Project Code	Project	Project Manager	Capital Forecast	Capital Budget	Capital Actual
IT_116_ARIBA	ARIBA RE-IMPLEMENTATION	Richards, Daly			
AED_ATG_2017	ATG 11.2 UPGRADE / KLO	Louie, Patricia			
AED_Chatbots_17	CHATBOTS	Bell, Heather			
AED_PTC_2017	CHECKOUT & PAYMENT				
AED_CICD_2017	CI/CD				
AED_CRM_2017	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)

#### Project Health



#### Cost and Effort



#### 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
	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
	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
					been finalized. Monthly Demo and have been finalized, toward Demo2 goals. 2017...				\$0
					in 2018 discussions for on.				\$0
					activity model went live in 17th trimester enabled successfully in				\$0
					work on the Governance Risk framework				\$0
					is				\$0
					Green Week Technical issues. Sections data from 3. Once received, we will and schedule project close				\$0
					completed on 1/11. Currently for Procure to Pay. Final cost, implementation plan 2/22.				\$0



Save Ad Hoc View  
 Save Ad Hoc View As...  
 Save Ad Hoc View and Create Report

[Crosstab](#)
[Sample Data](#)

Click to add a title

	Measures	Total Actual Hours
Project Manager	Project Name	
Abbott, Paul	Driving SFDC Effectiveness	25.00
Allin, Lee	Transship functionality	425.00
Arbelaez, 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

# External BI Tools / Use With CA PPM

*rego*University 2018

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

19



Let Rego be your guide.

regoUniversity 2018

# Best Practices

*rego*University 2018

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

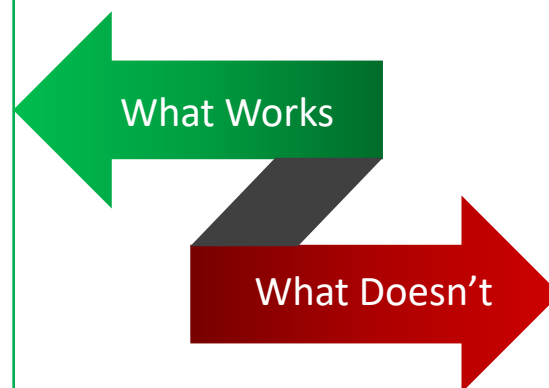
**In most cases, the reality is not a single reporting solution, but a mix of tools**

- 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?



*rego*University 2018

Let Rego be your guide.

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**



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



### Phone

888.813.0444



### Email

[info@regouniversity.com](mailto:info@regouniversity.com)



### Website

[www.regouniversity.com](http://www.regouniversity.com)