regoUniversity 2021
VIRTUAL
Reporting Strategies
Your Guides:
Robert Newell and Clayton Reynolds

Agenda

REPORTING STRATEGY INTRODUCTION

CA PPM REPORTING OPTIONS

EXTERNAL BI TOOLS / USE WITH CA PPM

BEST PRACTICES

Reporting Strategy Introduction

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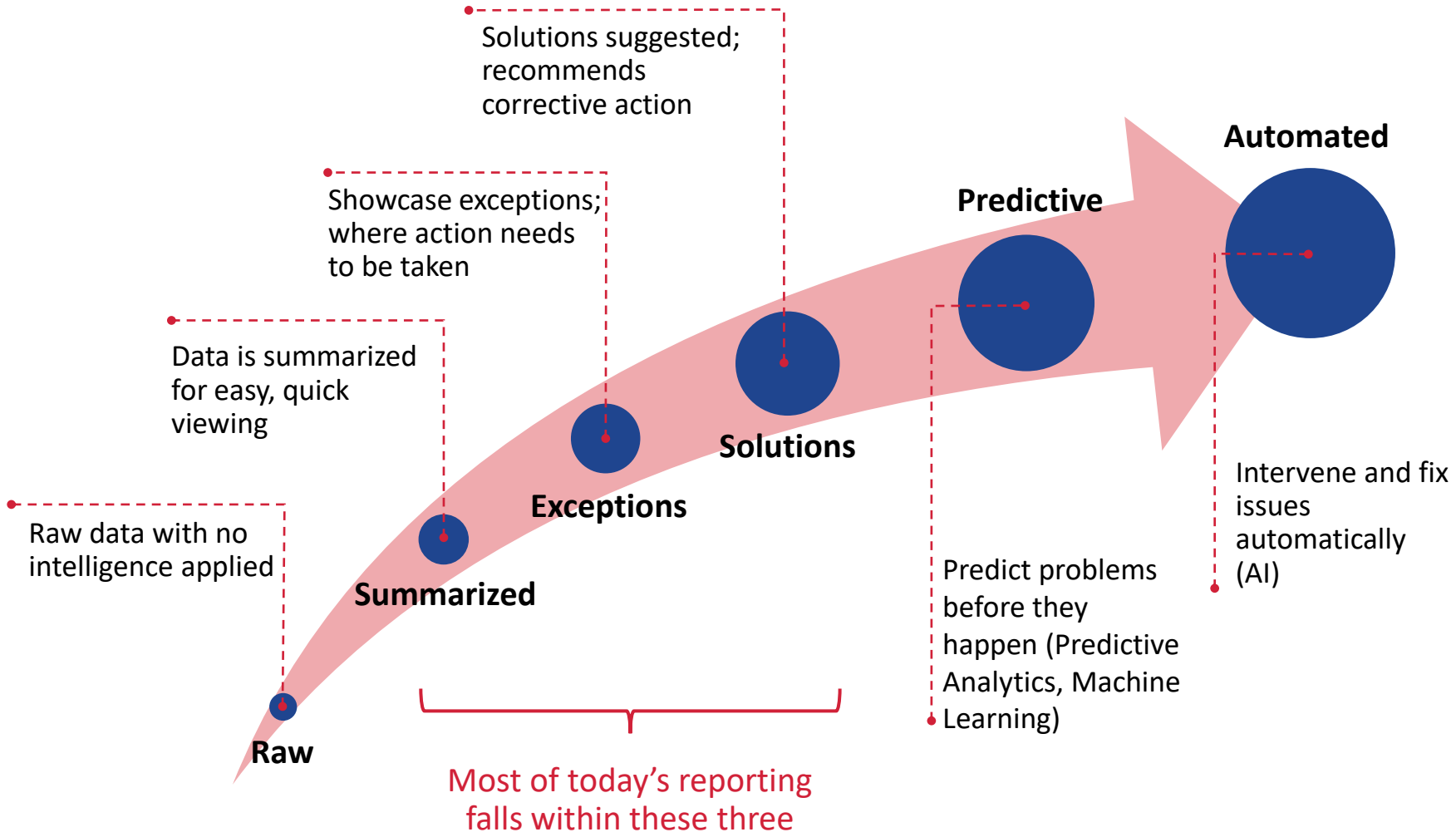
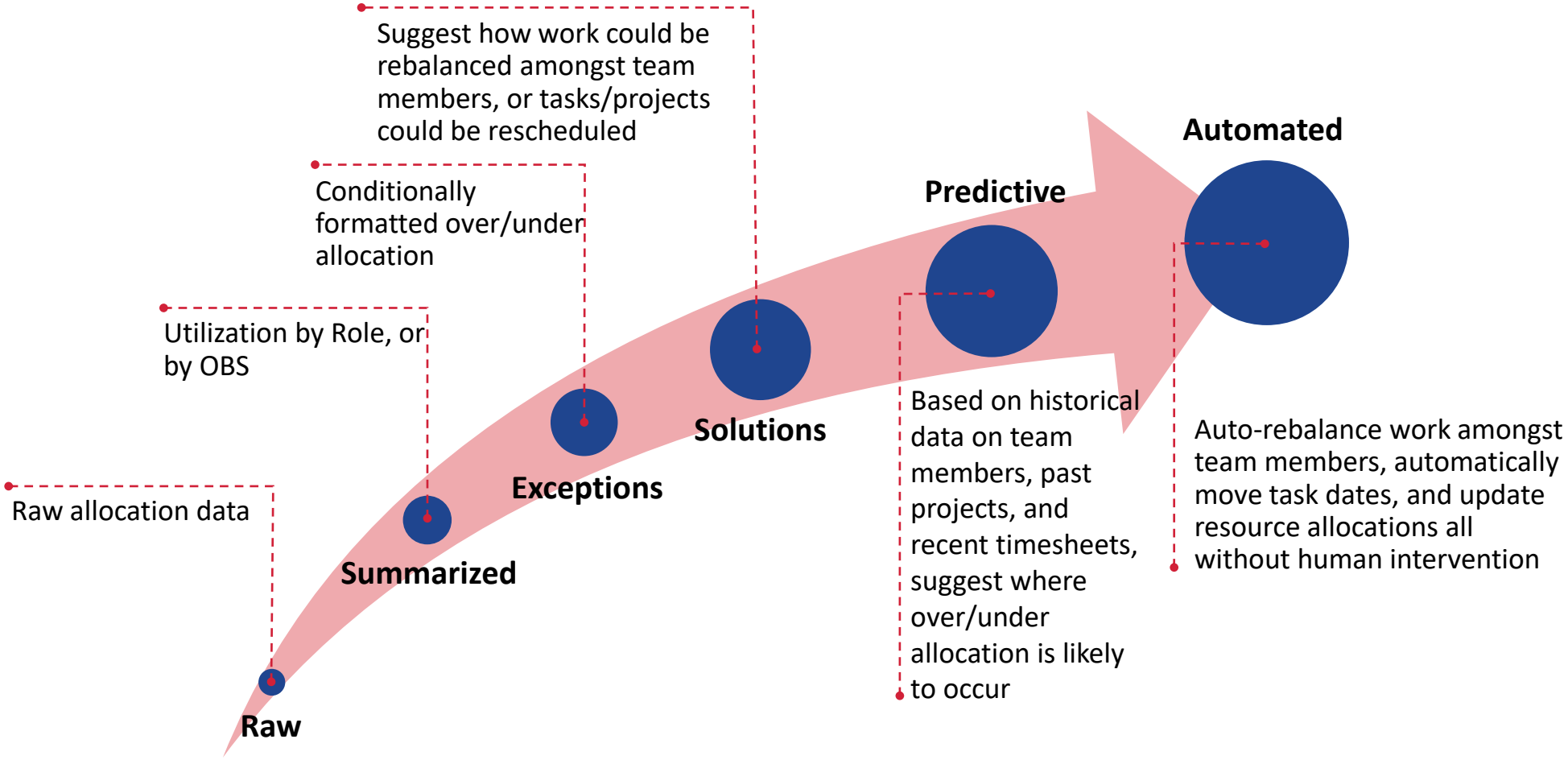
Industry Trends & The Future of BI

- Data and analytics as a core business function
  - D&A is now making the shift into a core business function, rather than a secondary activity. D&A now is a shared business asset aligned to business results. Gartner noted that D&A silos break down because of better collaboration between central and federated D&A teams.
- Graph relates everything
  - Graphs form the foundation of most modern data and analytics capabilities and are reliant on the foundation to find relationships between people, places, things, events and locations across a wide variety of data assets. D&A leaders rely on graphs as quick answers to complex business questions, which require contextual awareness and an understanding of the nature of connections and strengths across multiple entities.
  - Gartner predicts that by 2025, graph technologies will be used in 80% of data and analytics innovations, up from 10% in 2021, facilitating rapid decision making across the organization.
- Augmented Analytics
  - Machine Learning
  - Augmented data preparation
  - Visual-based data discovery
  - Automated advanced analytics
  - Natural Language Processing

Evolution of Business Intelligence

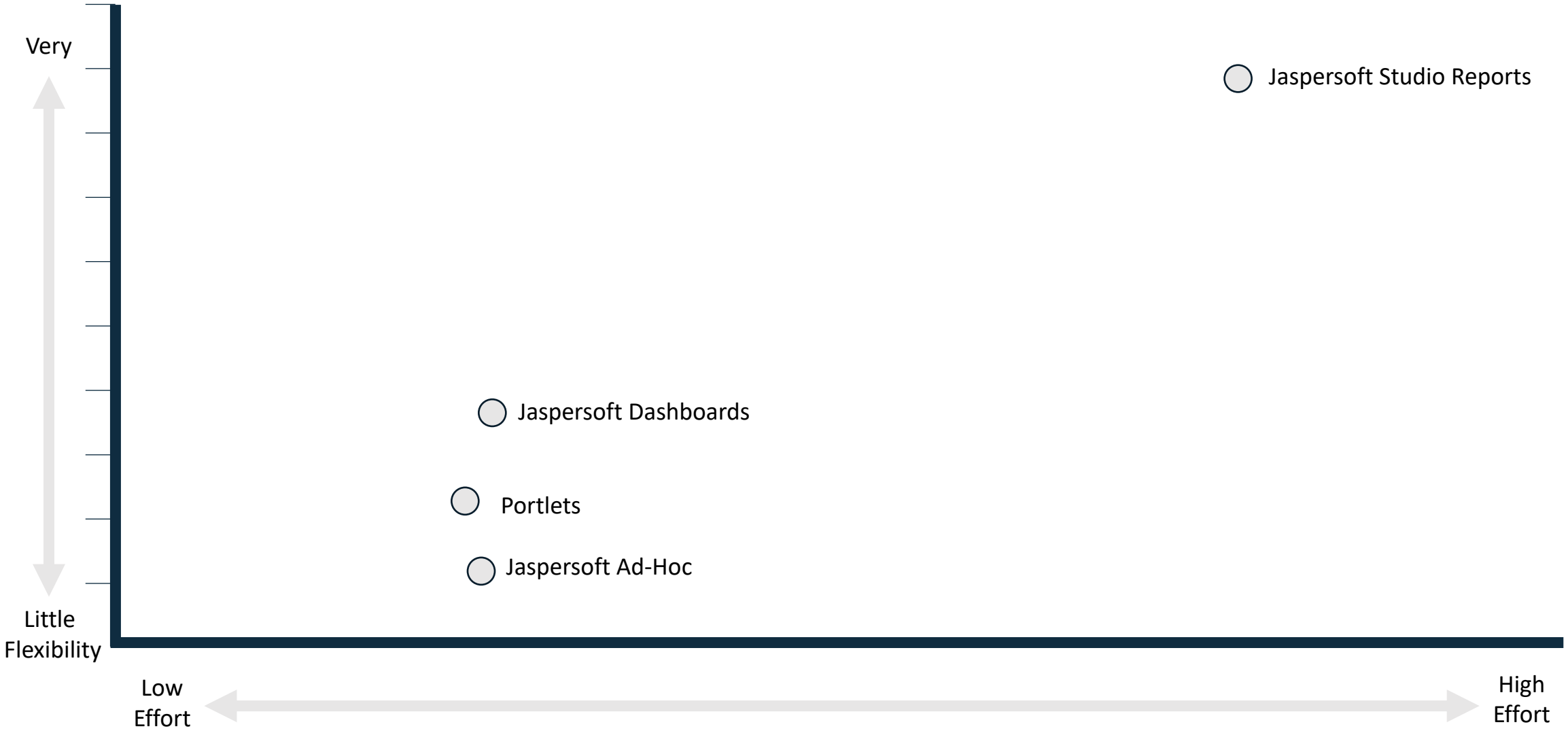


Example: Resource Allocations

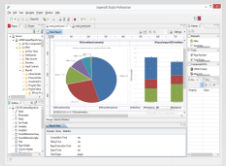


CA PPM Reporting Options

OOTB Reporting Tool - Flexibility vs Effort

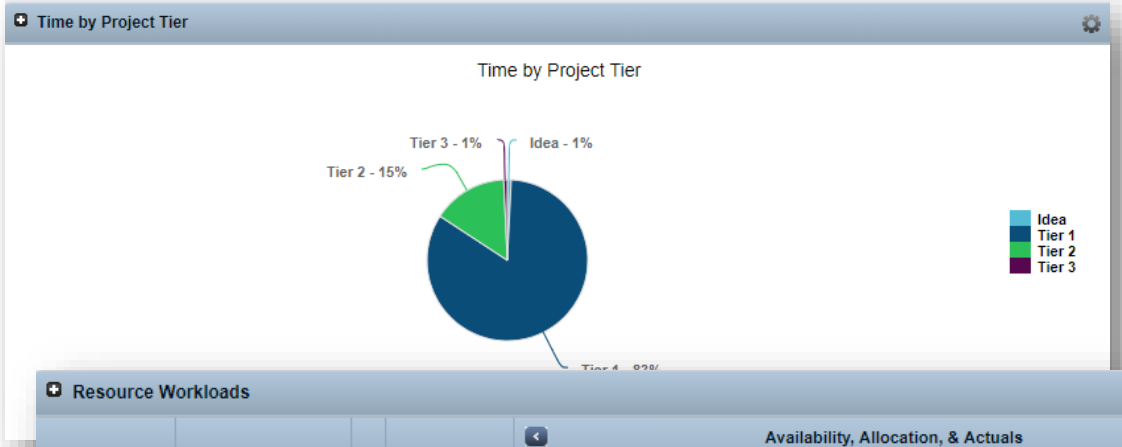


OOTB Reporting Tools

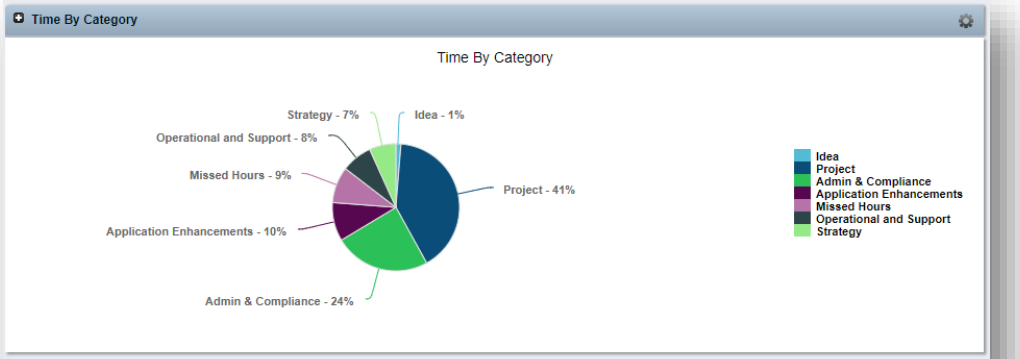
Portlets 	• Data wholly resides in Clarity • Reports are operational, used day to day. • Data is rendered within acceptable performance thresholds	• The data does not need to be accessed by non-clarity users • The number of data elements required does not negatively affect the usability. • Personalization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

Time by Project Tier



Time By Category



Resource Workloads

Resource	Primary Role		Availability, Allocation, & Actuals	Jan 18	Feb 18	Mar 18	Apr 18	May 18	Jun 18	Jul 18	Aug 18	Sep 18	Oct 18	Nov 18	Dec 18	Manager
Abbott, Paul	Manager/Supervisor		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Fedele, Mark
			Allocation	73.60	64.00	70.40	58.80	64.40	74.80	79.20	27.60	24.00	9.20	8.80	8.40	
			Actuals	223.00	179.00	197.00	40.00									
Akouri, Elias	Manager/Supervisor		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Vu-Pham, Trang
			Allocation													
			Actuals	296.00	302.41	247.25	63.00									
Alexander, Ellen	Business/Systems Analyst		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Vliet, Marc van
			Allocation	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	192.00	220.80	211.20	201.60	
			Actuals	227.00	195.13	217.99	43.29									
Allin, Lee	Business/Systems Analyst		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Kluge, Peter
			Allocation	48.00	168.00	295.99	296.00	232.00	231.99	232.00	232.00	232.00	232.00	232.00	231.99	
			Actuals	197.00	175.00	190.00	40.00									
Arbelaez, Luz	Business/Systems Analyst		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Rende, Ignacio
			Allocation	56.00	112.00	123.20	84.00	147.20	168.00	88.00	92.00	32.00	36.80	35.20	33.60	
			Actuals	107.00	147.00	176.00	40.00									
Bapat, Rashmi	Applications Developer		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Sen, Partha
			Allocation													
			Actuals	184.00	160.00	176.00										
Basak, Surajit	Manager/Supervisor		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Goodloe, Alan
			Allocation	201.80	203.00	225.71	226.40	243.20	234.80	202.40	211.60	96.00	64.40	61.60	58.80	
			Actuals	101.00	151.00	203.50	49.00									
Bedi, Karan	Manager/Supervisor		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Vu-Pham, Trang
			Allocation													
			Actuals	184.00	160.00	177.00	40.00									

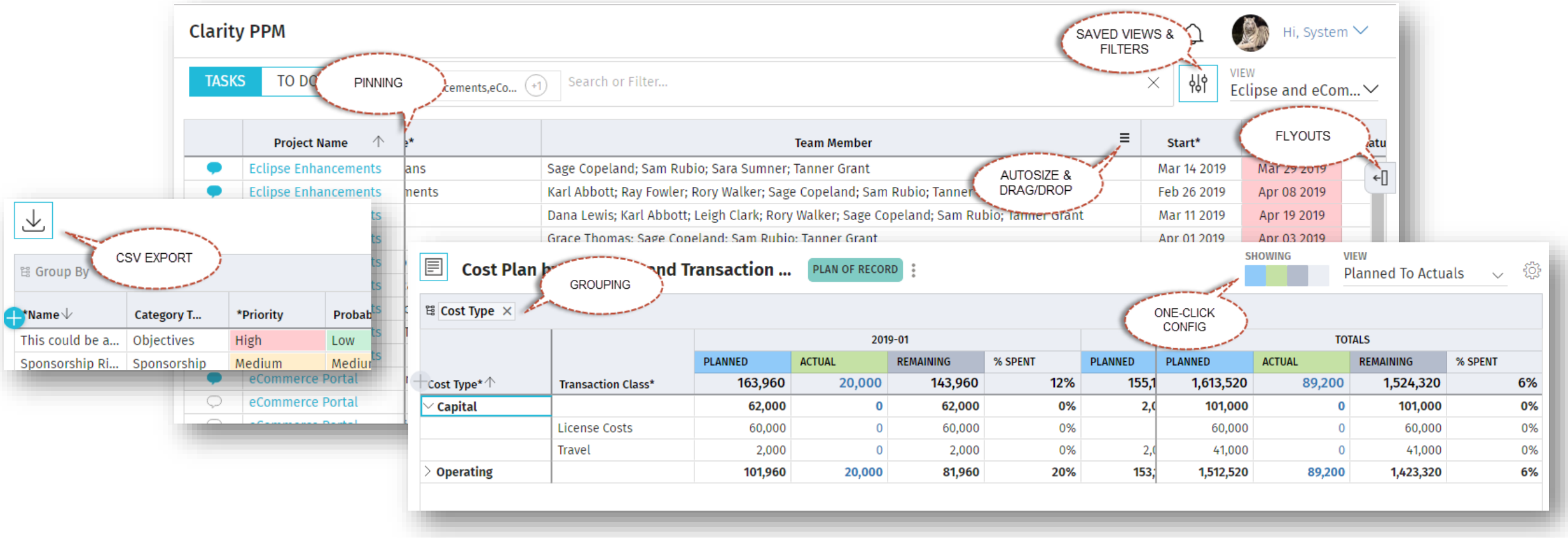
Missing Time by Resource

Resource Manager | Resource Is Active: Yes
Resource | Time Start: 1/1/2018
Time End: 4/11/2018
Resource OBS: Department OBS:IT
Resource OBS Mode: Unit and descendants
Filter | Save Filter | Clear

Resource	Resource Manager	Time Period	Timesheet Status
Chang, Roger	Abbott, Paul	04/09/18 - 04/16/18	Open
Harker, Mark	Abbott, Paul	04/09/18 - 04/16/18	Not Opened
He, Grace	Abbott, Paul	03/19/18 - 03/26/18	Open
He, Grace	Abbott, Paul	03/26/18 - 04/02/18	Not Opened
He, Grace	Abbott, Paul	04/02/18 - 04/09/18	Not Opened
He, Grace	Abbott, Paul	04/09/18 - 04/16/18	Not Opened
Kontra, Terry	Abbott, Paul	04/02/18 - 04/09/18	Not Opened
Kontra, Terry	Abbott, Paul	04/09/18 - 04/16/18	Not Opened
Linale, Jorge	Abbott, Paul	04/09/18 - 04/16/18	Not Opened
Savelieff, Dimitri	Abbott, Paul	03/26/18 - 04/02/18	Not Opened
Savelieff, Dimitri	Abbott, Paul	04/02/18 - 04/09/18	Not Opened
Savelieff, Dimitri	Abbott, Paul	04/09/18 - 04/16/18	Not Opened
Troxell, Scott	Abbott, Paul	04/09/18 - 04/16/18	Approved
Mahajan, Mahesh	Akouri, Elias	04/02/18 - 04/09/18	Not Opened
Mahajan, Mahesh	Akouri, Elias	04/09/18 - 04/16/18	Not Opened
Singh, Narender	Akouri, Elias	03/12/18 - 03/19/18	Open
Singh, Narender	Akouri, Elias	03/19/18 - 03/26/18	Not Opened
Singh, Narender	Akouri, Elias	03/26/18 - 04/02/18	Not Opened
Singh, Narender	Akouri, Elias	04/02/18 - 04/09/18	Not Opened

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.



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				

AMERICAN EAGLE

Corporate Portfolio Status Update

11 April 2018

◆	High confidence the defined goal will be achieved.	⚠	Issues occuring 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
				⚠	...een finalized. Monthly Demo ...ence have been finalized. ...toward Demo2 goals . 2017 ...s.	⚠	◆	◆	$0		8 February 2018
				◆	...th 2018 discussions for ...ion.	◆	◆	◆	$0		23 January 2018
				◆	...acity model went live in 17H ...timizer enabled successfully in	◆	◆	◆	$0		9 February 2018
				◆	...ork on the Governance Risk ...mework	◆	◆	◆	$0		9 February 2018
				◆	...s.	◆	◆	◆	$0		23 January 2018
				◆	...Green Week Technical ...tinues. 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

2017 - Enterprise Insights Foundation (HANA EDW)

Project Information

Contact	Palicki, Matthew
Finish Date	February 28, 2018

Project Health

Overall

Schedule
Budget
Scope
OCR
Staffing

Cost and Effort

Effort Spent: 12%

Budget Spent: 44%

Status Report Update

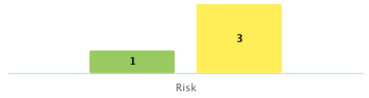
Testing for Wave 0 deliverables has kicked off with expected completion and subsequent go-live in PROD by end of week 12-June. Concurrently, Wave 1 requirements are being finalized and prepared for sign-off. Communications continue to be developed along with plans for next Steering Committee (SC) update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

Status Information

May-17 | Jun-17 | Jul-17 | Aug-17 | Sep-17 | Oct-17

Not Started | In Process | Complete

Active Risks, Issues, & Change Requests



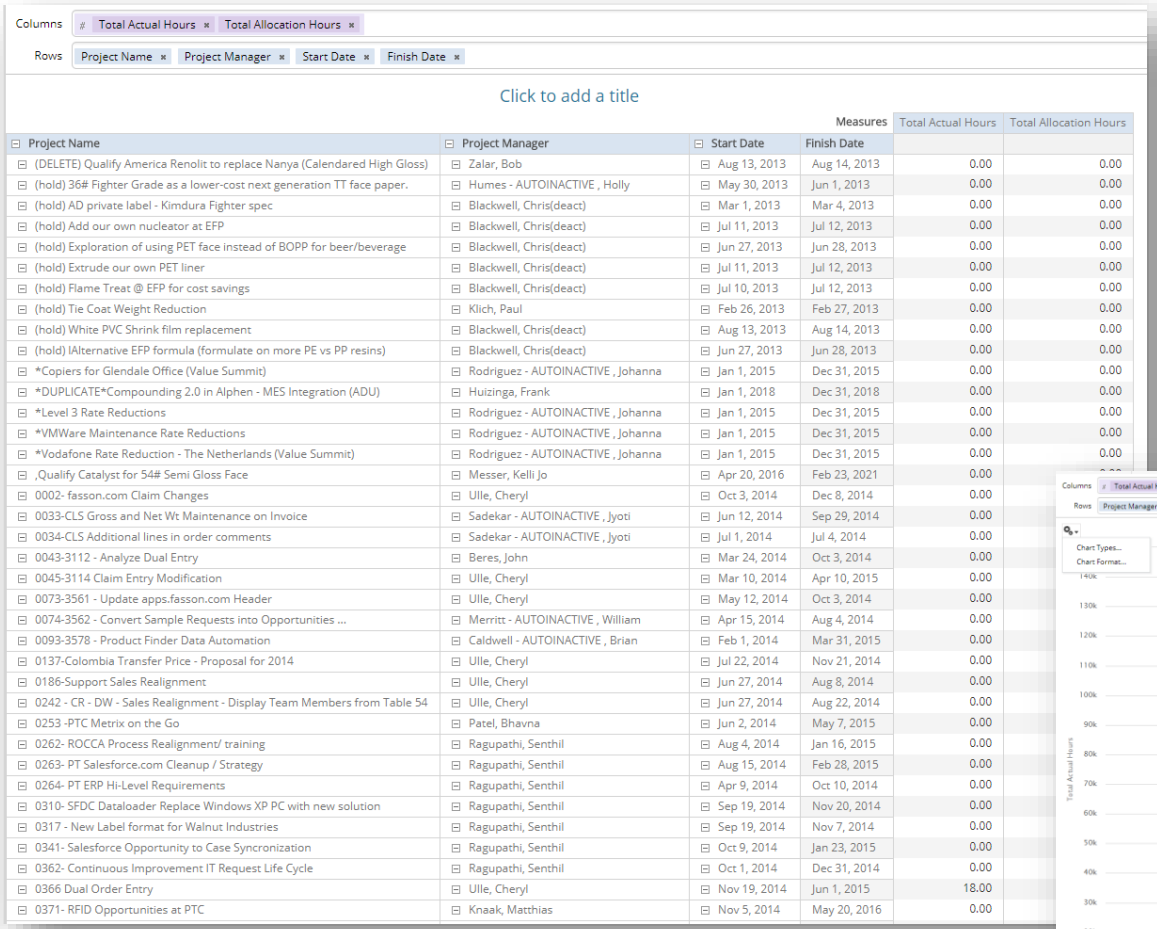
Key Accomplishments

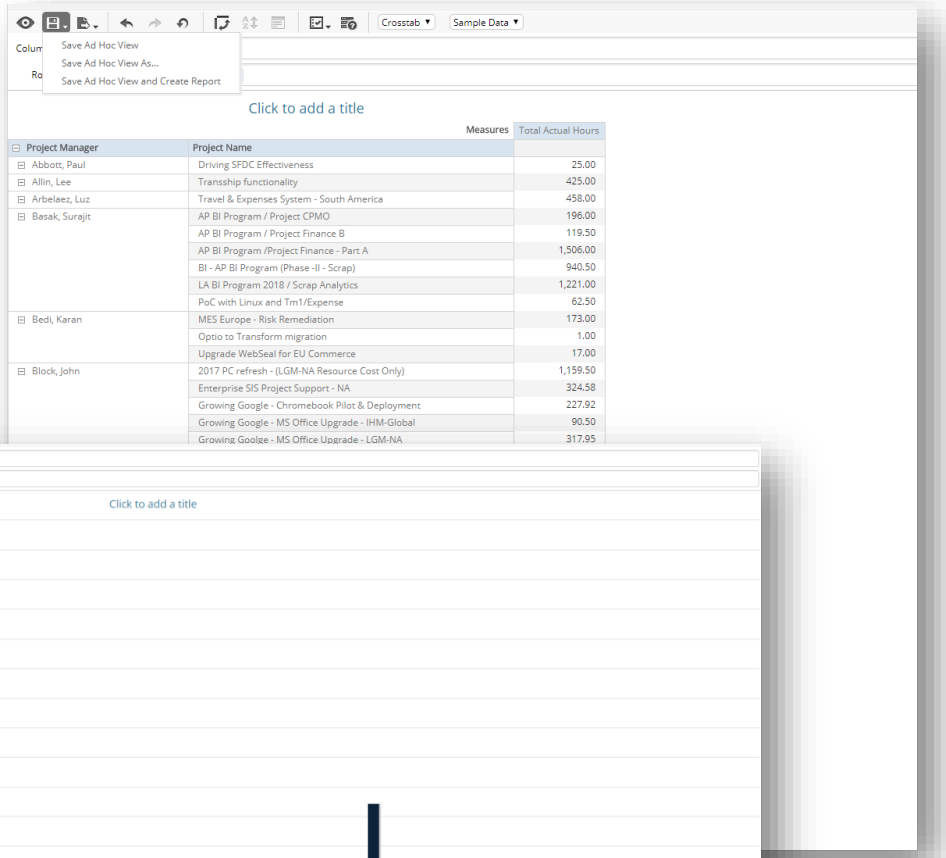
- Conducted Wave 0 Test Cycle kickoff
- Continued work on finalizing Wave 1 requirements
- Conducted alignment checkpoint with Masterdata Governance
- Production system build complete and cutover plan provided to team
- First communication from SC drafted and submitted for Sponsor approval

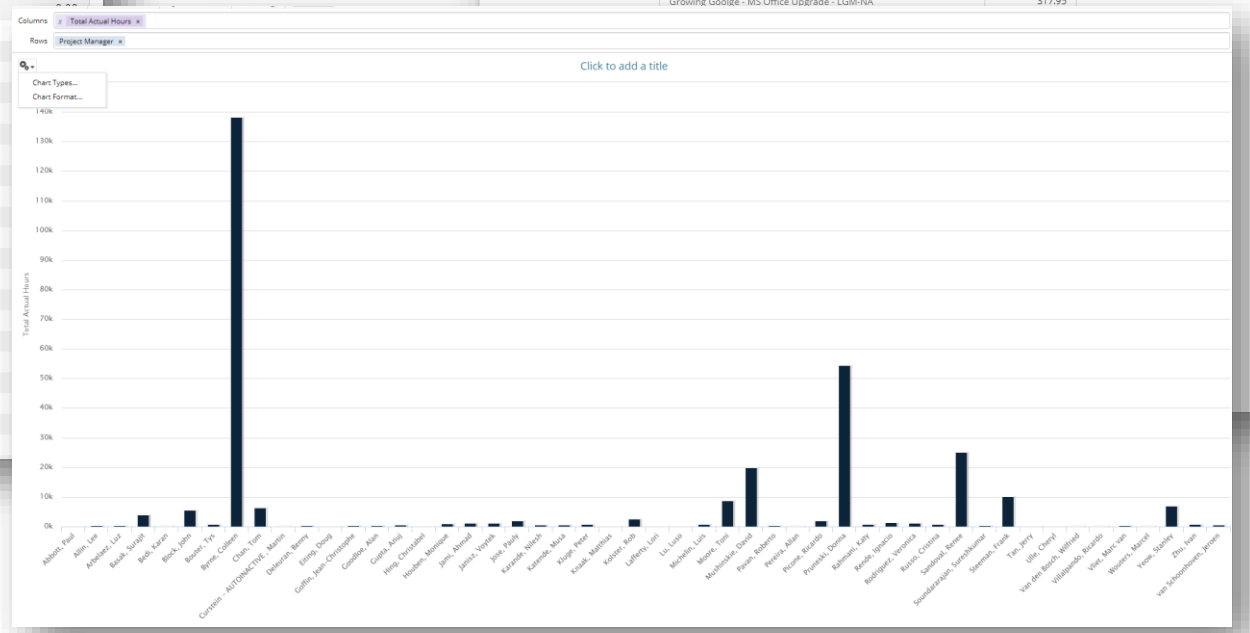
Upcoming Activities

- 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

Real World Example – Jaspersoft Ad Hoc







Recent Jaspersoft Improvements

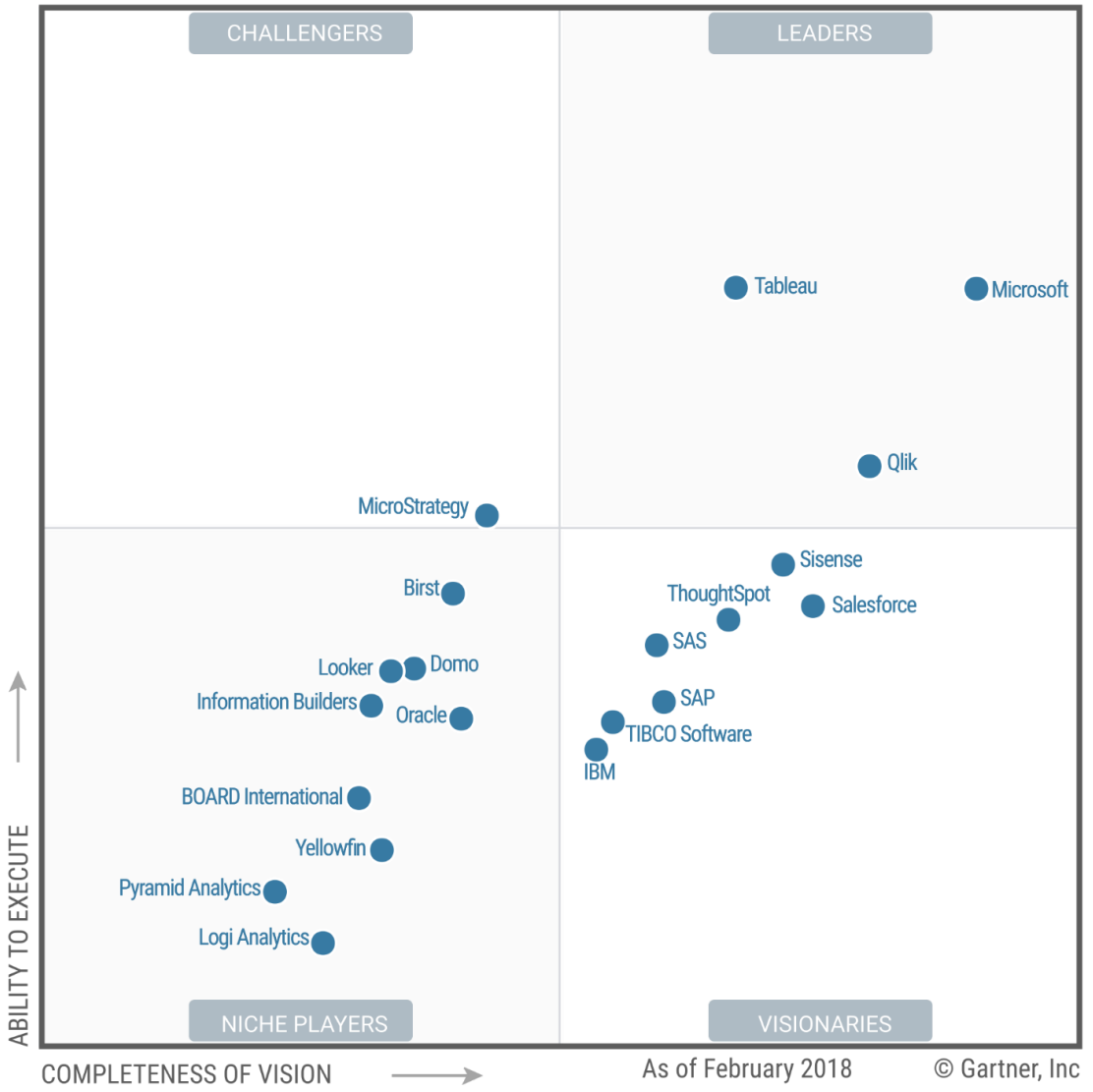
- 15.3
  - Re-Introduction of Reports and Jobs – moving the ability to quickly access and schedule reports out of the Advanced Reporting link
  - Ability to have “My Reports” again
  - Jaspersoft reports now utilize the Parameters native to CA PPM
  - The ability to run a report via the *Actions* menu 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

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 (3rd party ETL tools help)
  - OData Connection

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



OData Direct Connection

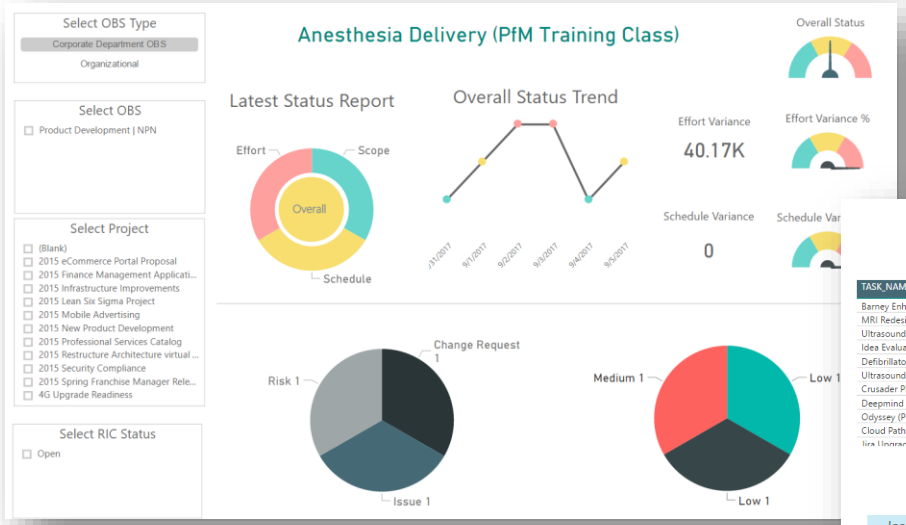
- As of 15.3, on Demand customers have the ability to use an OData connector to point a BI tool at the CA PPM DWH. This will enable the use for Spotfire, Tableau, PowerBI, QlikView, etc
- The connector will only go against the updated Data Warehouse
- The connector was optimized to work with PowerBI,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

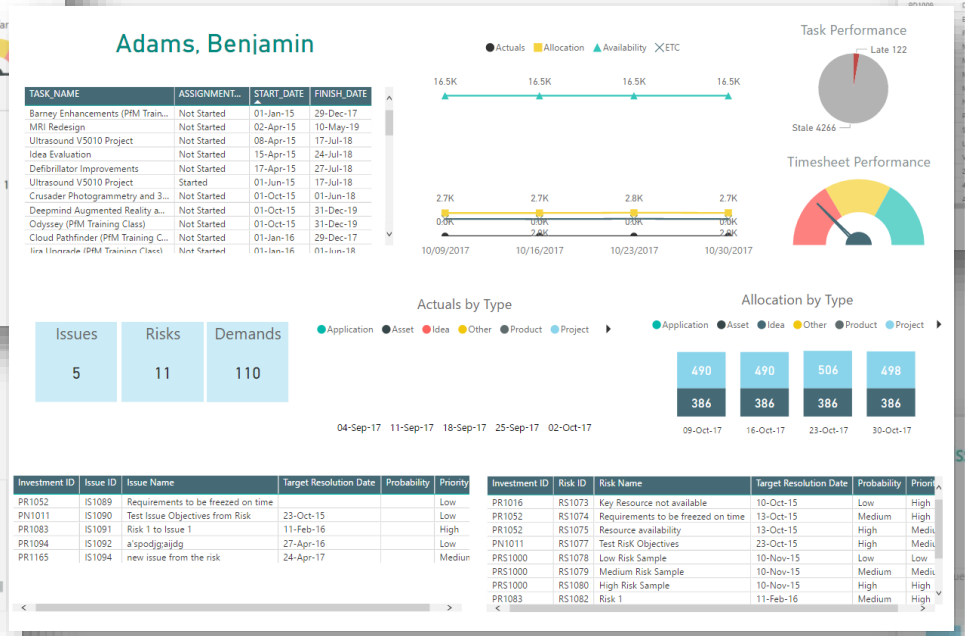
  NOTE: Recommended to use Power BI, as OData support in Tableau and Spotfire is limited
- Row level security possible with custom BI User ID on the CA PPM Resource
- In 15.4, CA added the ability to have individual logins for OData access

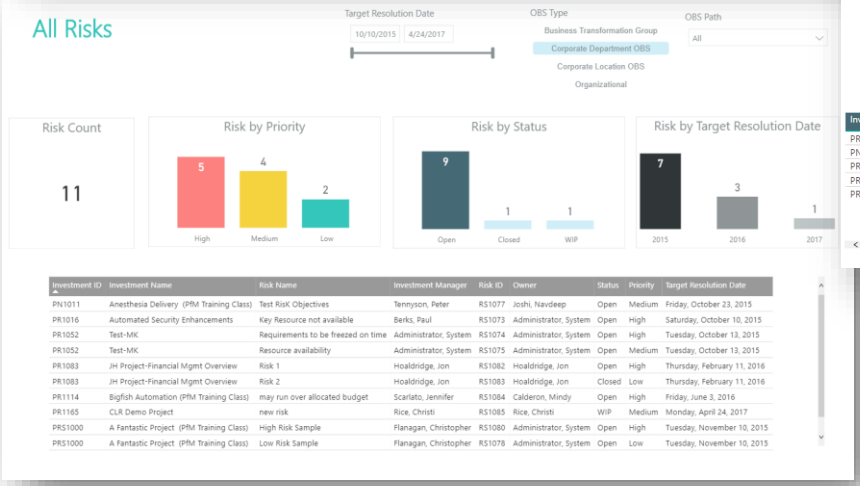
Rego Data Extractor

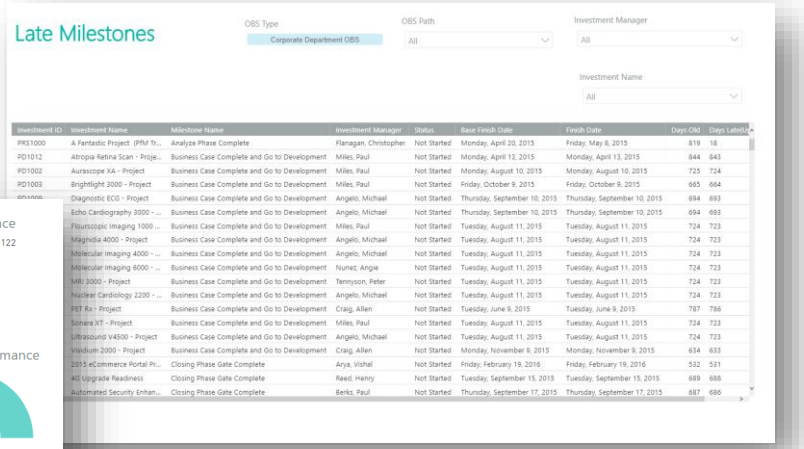
- Extract data using SQL language
- Create and schedule multiple extractions depending on business need
- Flexible options
  - Batch data for large exports
  - Zip files
  - Custom data and line separators
  - Dynamic filenames with flexible date formatting
  - Flexible distribution of extracts including email and Knowledge Store
- Performance metrics
  - The amount of data extracted
  - Time of extraction
  - Success Failures
- Test cases for extracts up to
  - 40 million records per day
  - 100+ extracts per day

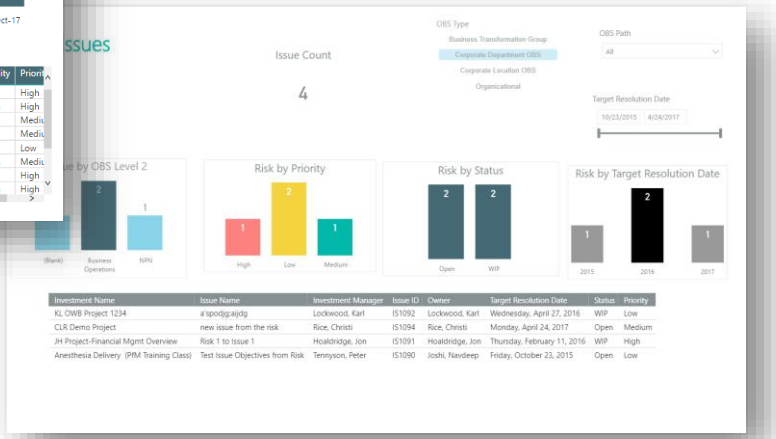
Real World Example - PowerBI



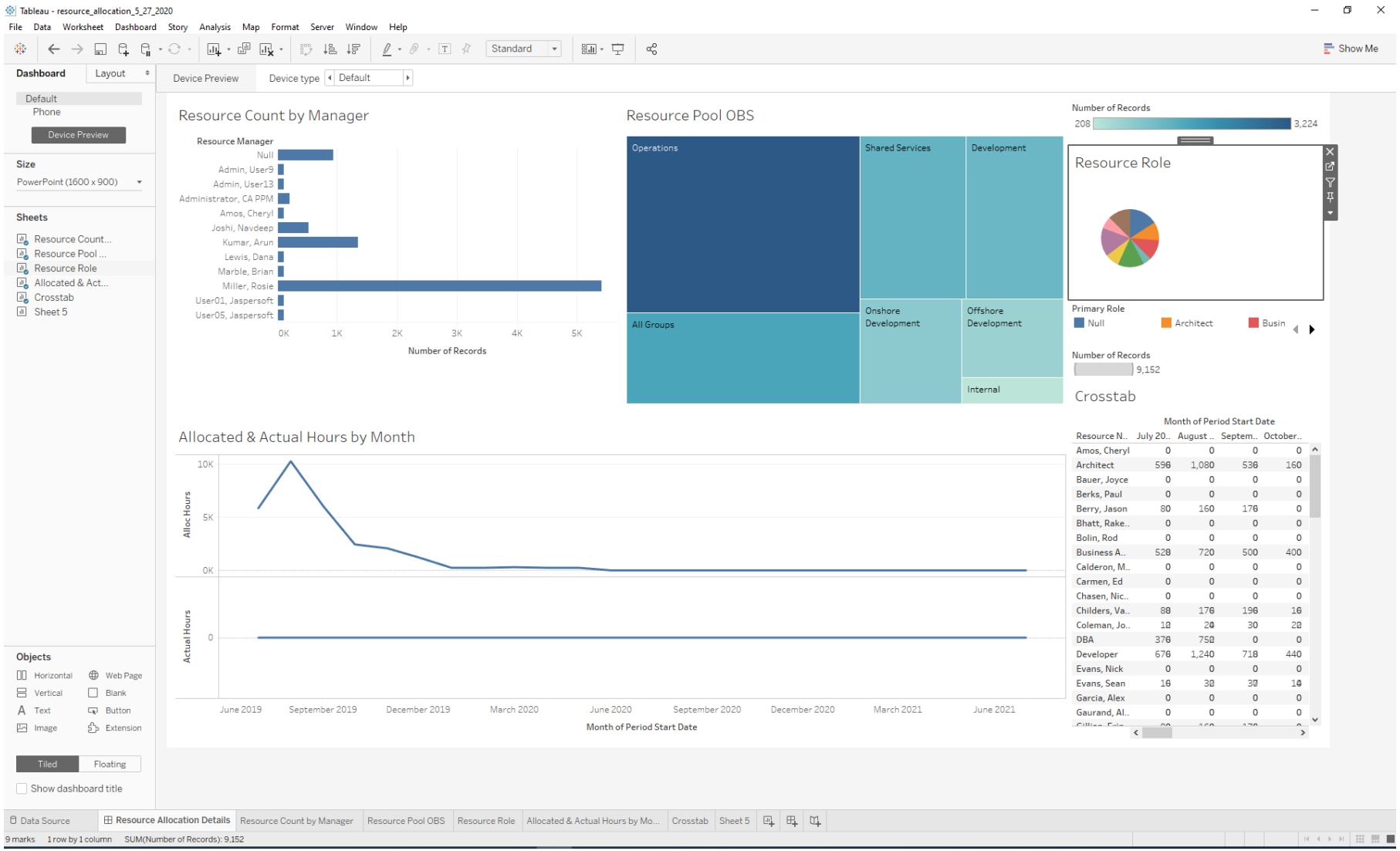








Real World Example - Tableau



Best Practice Recommendations

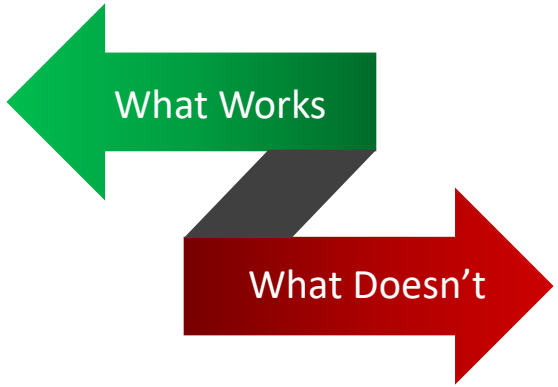
Diverse Strategy

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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- 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**
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