regoUniversity
NASHVILLE · 2022
Reporting | Strategies
Your Guides: Wes McCoubrie and Karen Lifsey

Introductions

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

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?

Agenda

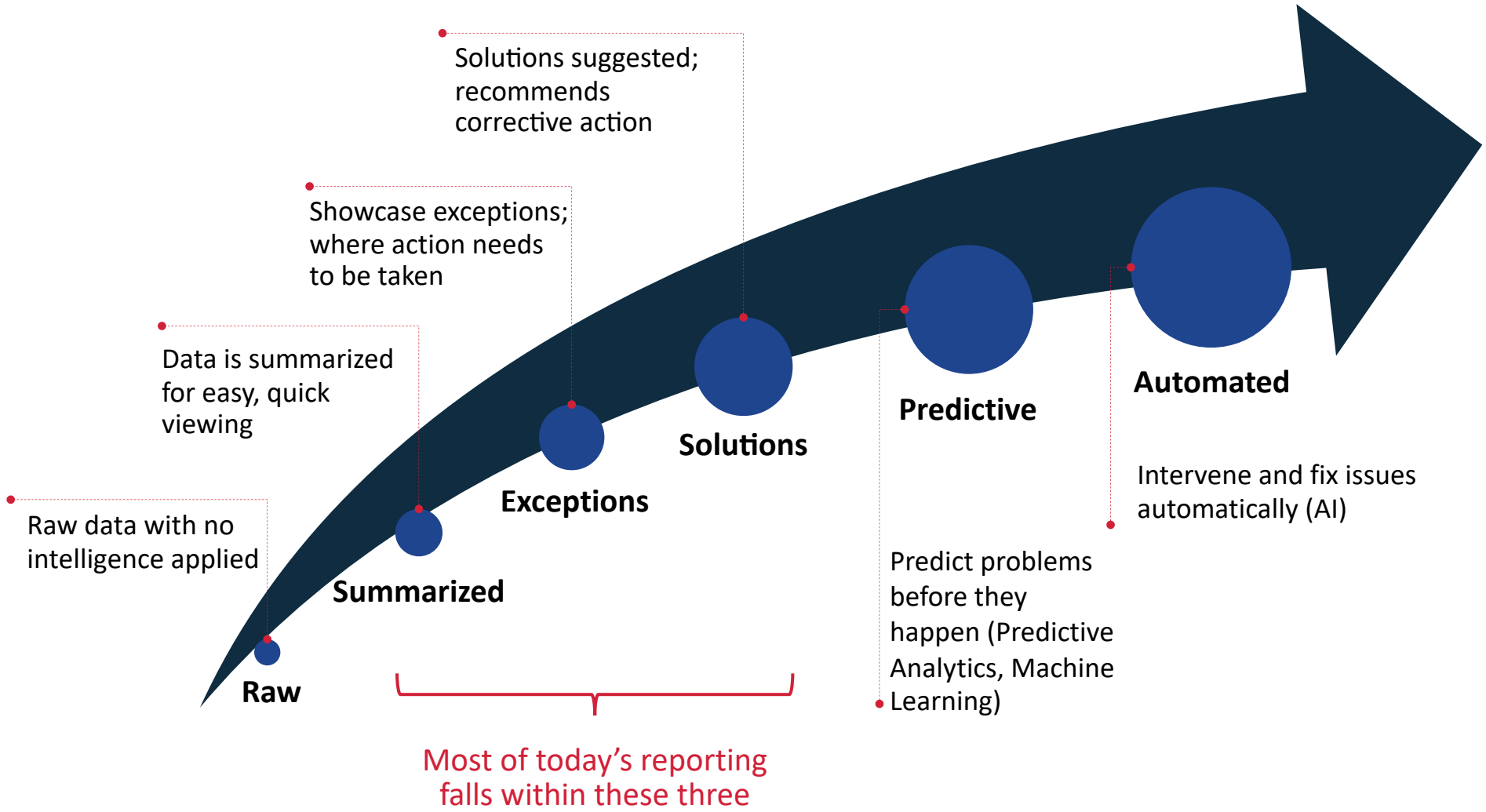
- Reporting Strategy Introduction
- Clarity Reporting Options
- Integrated BI Tools
- Best Practices

Reporting Strategy Introduction

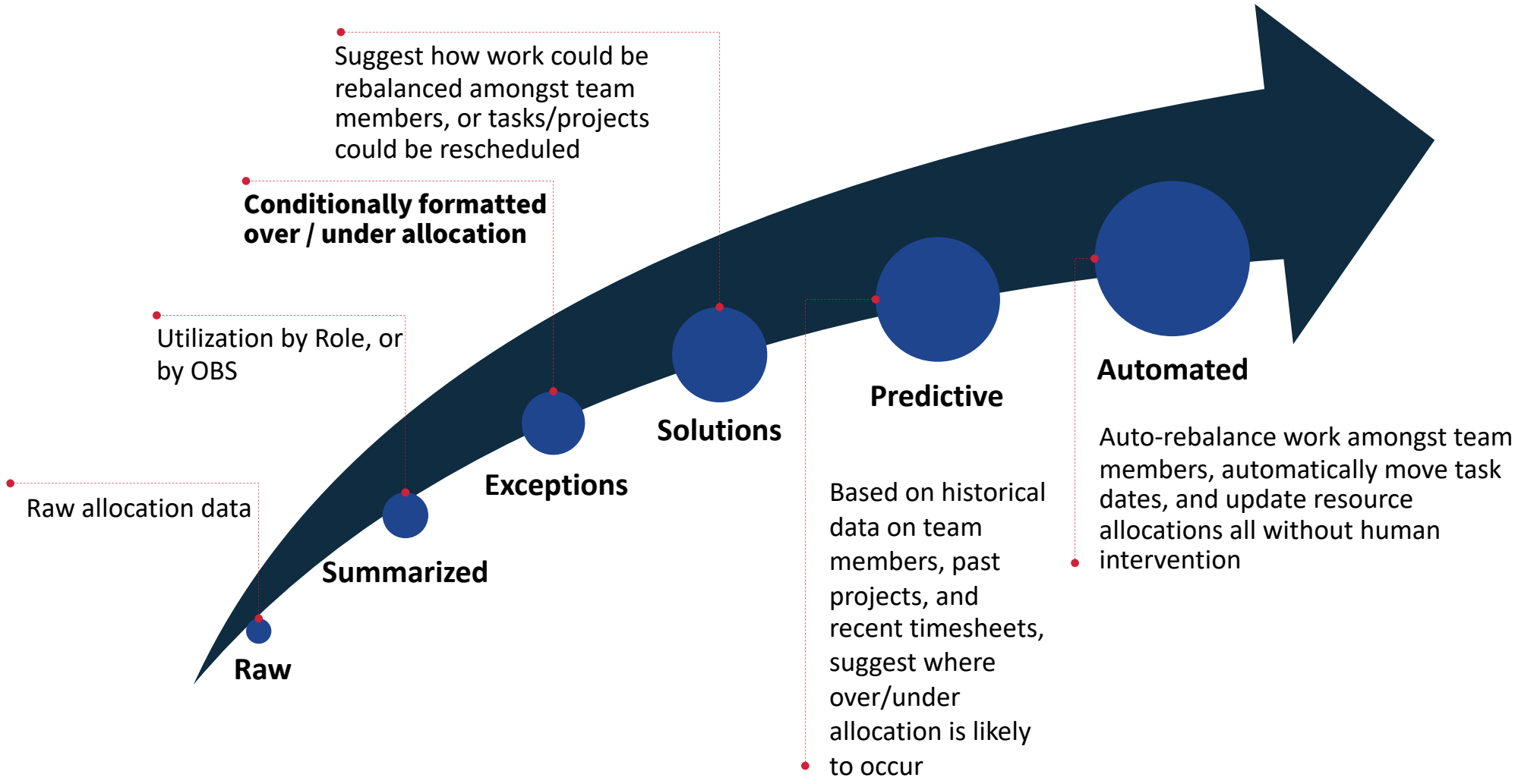
Analytic & BI Trends for 2022 (https://www.datapine.com/blog/business-intelligence-trends/)

- Artificial Intelligence
- Data Security
- *Data Discovery/Visualization*
- *Data Quality Management*
- *Predictive and Prescriptive Analytic Tools*
- *Real-time Data & Analytics*
- *Collaborative BI*
- Data Literacy
- Data Automation
- Embedded Analytics

Evolution of Business Intelligence

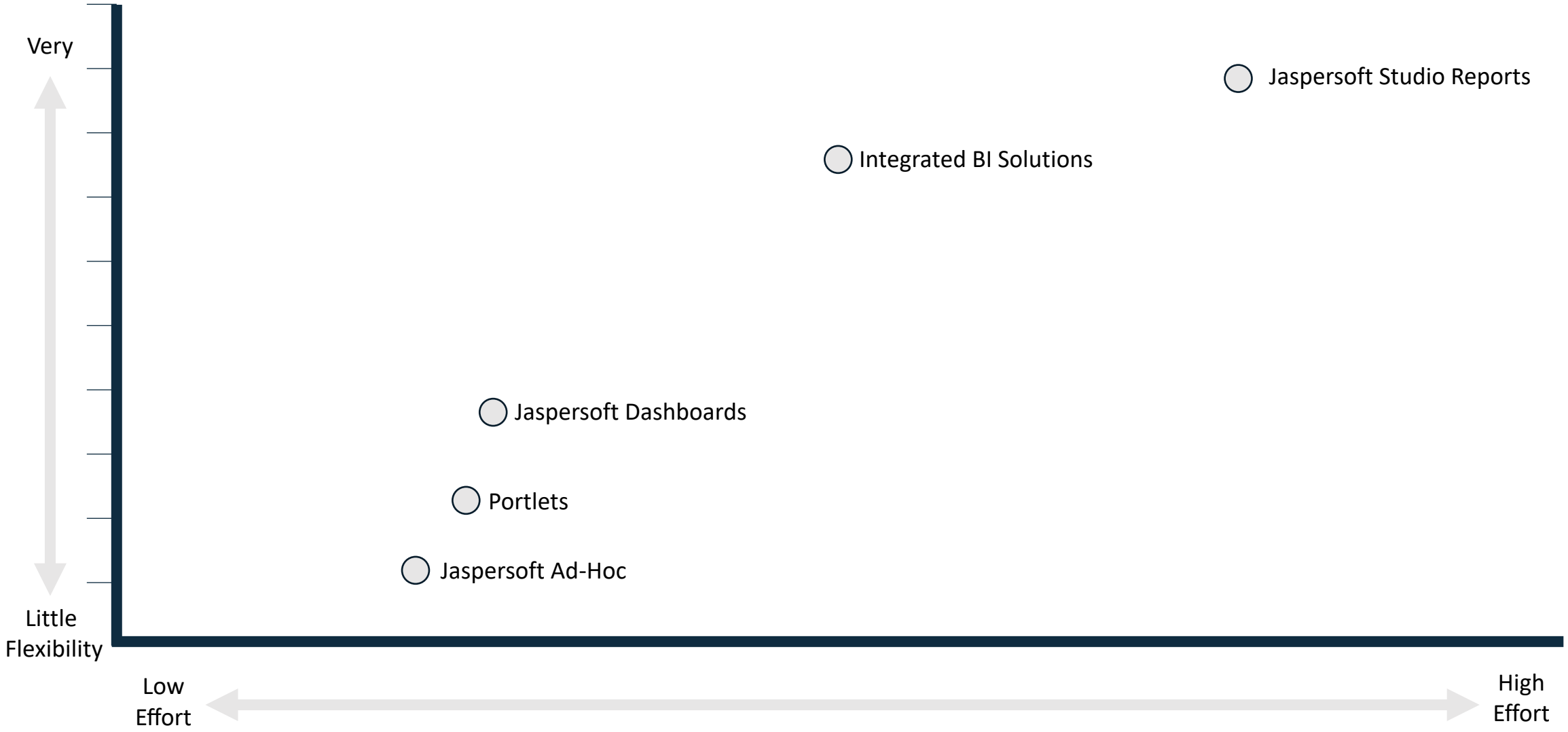


Example: Resource Allocations



Clarity Reporting Options

Reporting Tools: Flexibility vs Effort

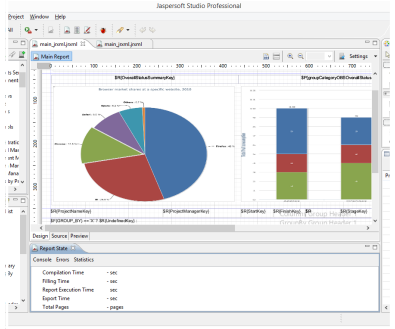


Reporting Tools

Portlets

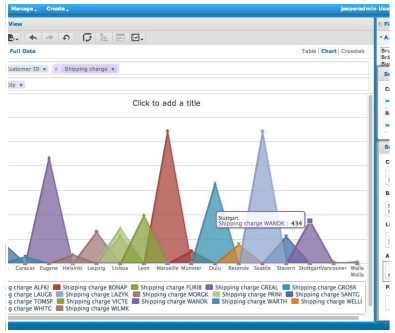
- Data sourced from Clarity transactional DB
- Reports are operational, used day-to-day
- The data does not need to be accessed by non-Clarity users
- Data is rendered within acceptable performance thresholds
- The number of data elements required does not negatively affect the usability.
- Personalization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

Studio Reports



- Data sourced from Clarity DWH as default
- PDF or other non-CSV formats needed
- Requires “pixel perfect” 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

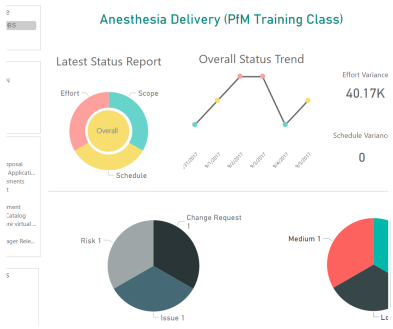


- Data sourced from Clarity DWH as default
- PDF or other non-CSV formats needed
- Used for ‘on the fly’ reporting
- Best suited for “super-users” who understand the underlying data.

Dashboards

- Summary level information with drill-down capability
- Short time-to-information interface
- Stock dashboards are available as well as user-defined “grouping” dashboards that present multiple Ad Hoc and Studio Reports on single page

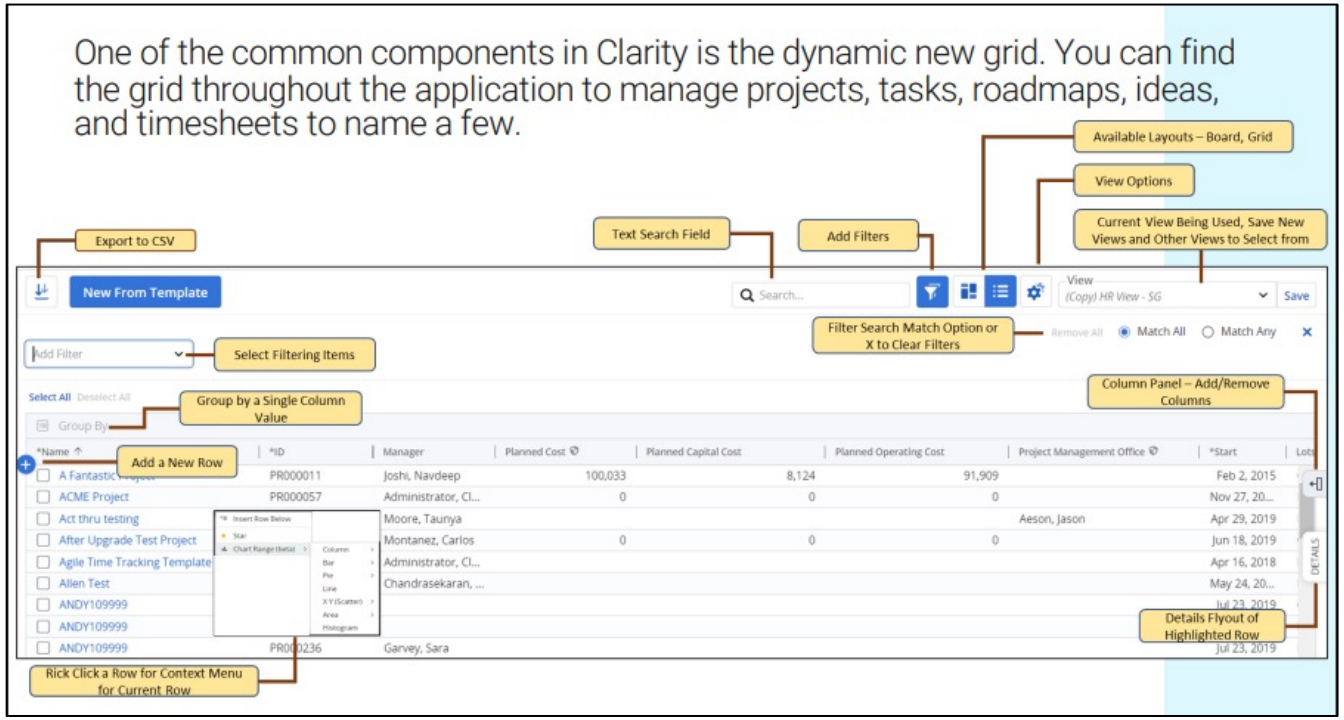
Integrated BI Solutions

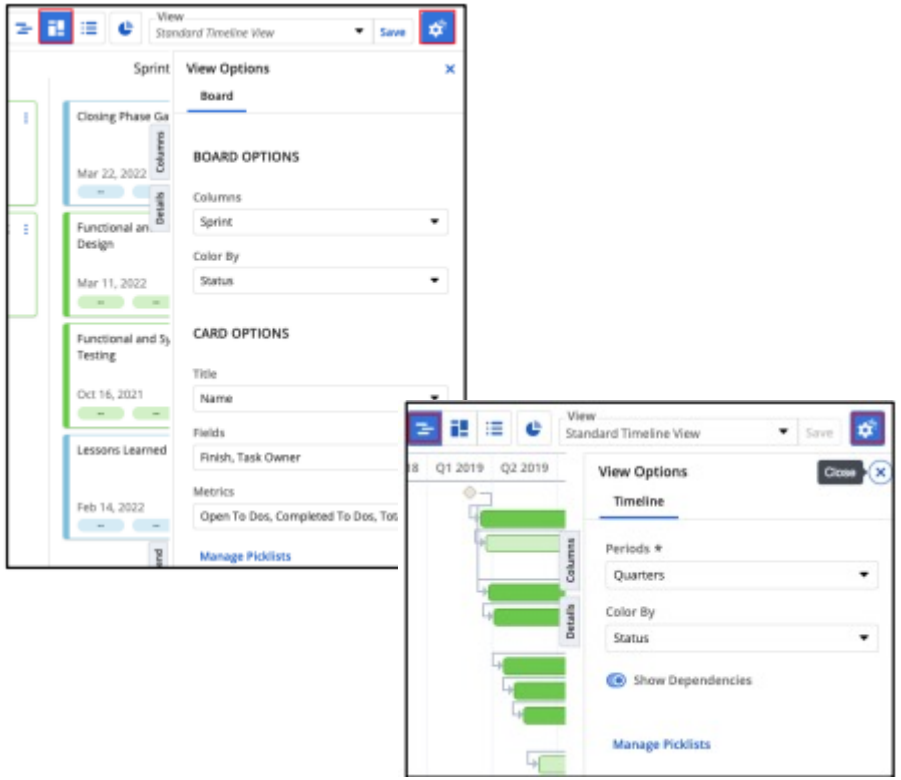


- Typically tied to multiple data sources
- OData and flat-file batch exports are common Clarity connection options
- Industry-best visualization, interactivity
- Affords most flexibility
- In-house expertise typically available (Power BI, Tableau, etc.)

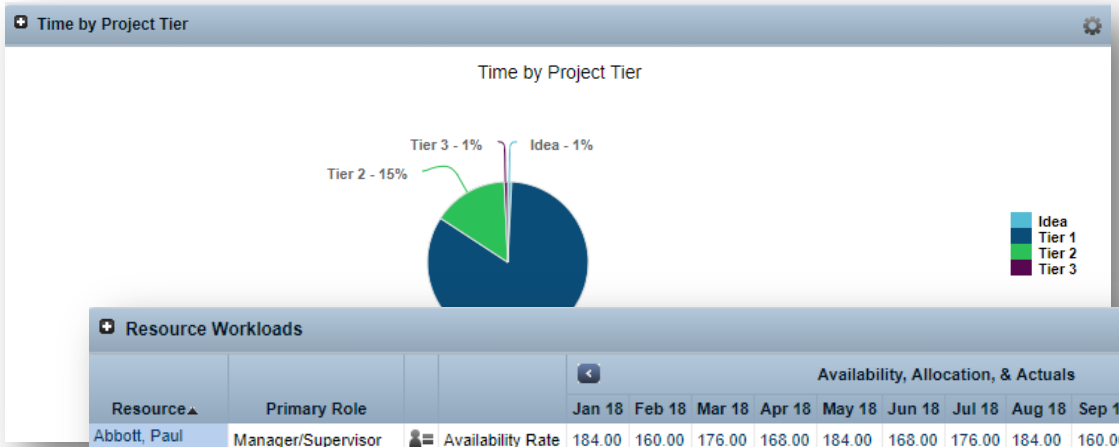
Portlets in the Modern UX

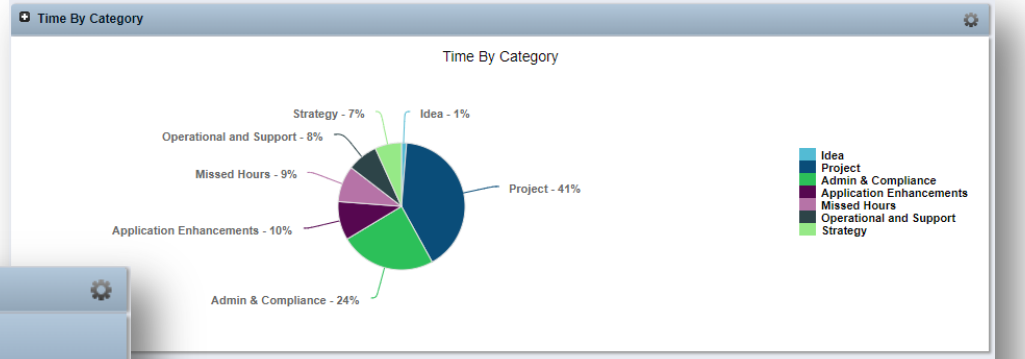
- In the Modern UX, custom portlets are – to an extent – being replaced by a heavy focus on personalization.
- Channels still leveraged for classic portlet dashboards.

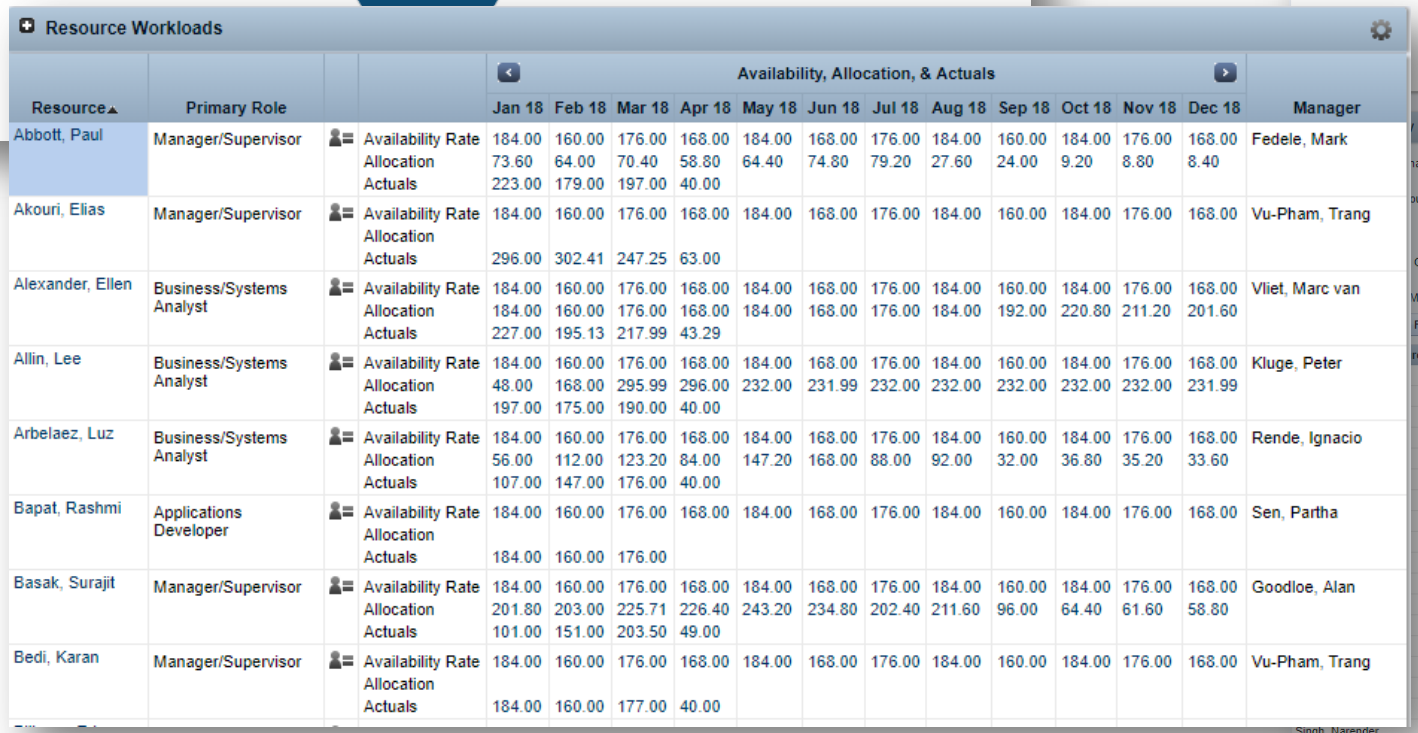




Portlet Examples

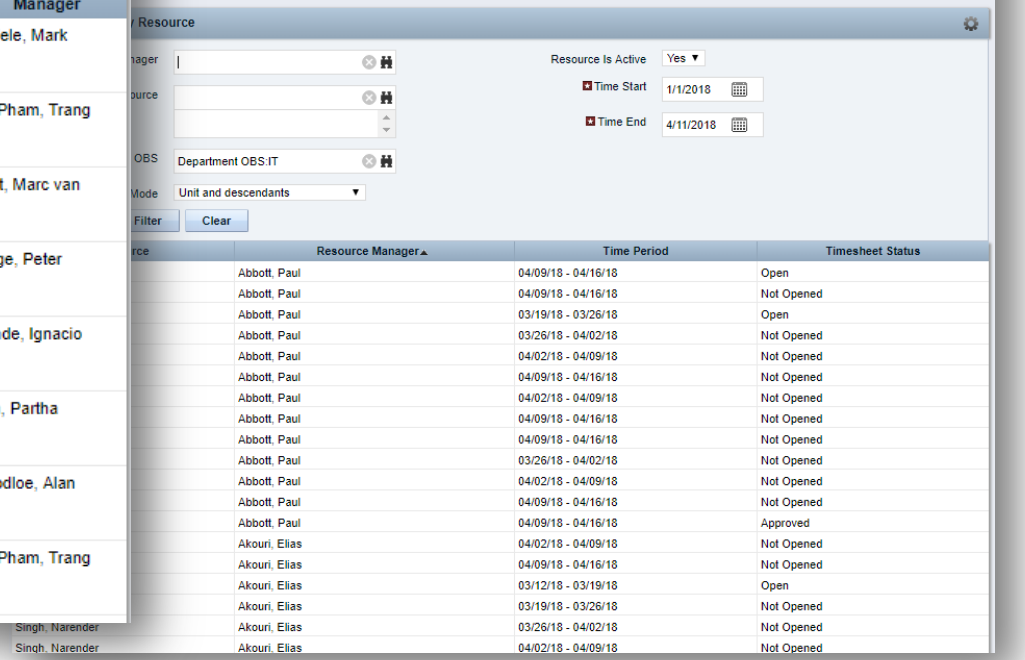




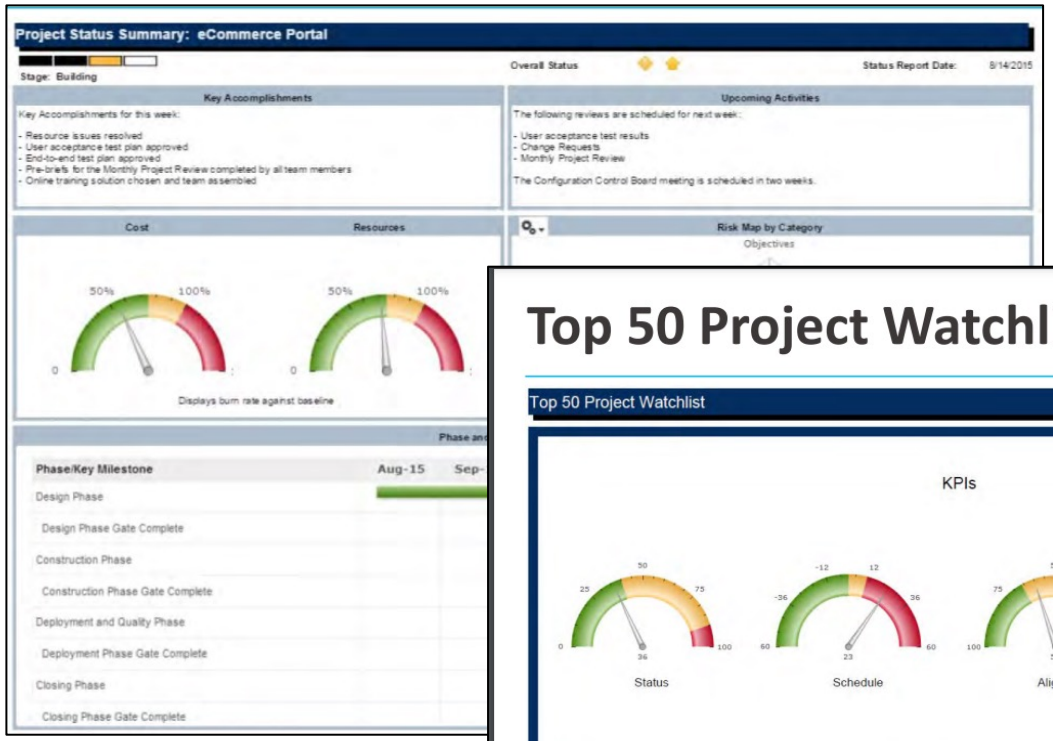


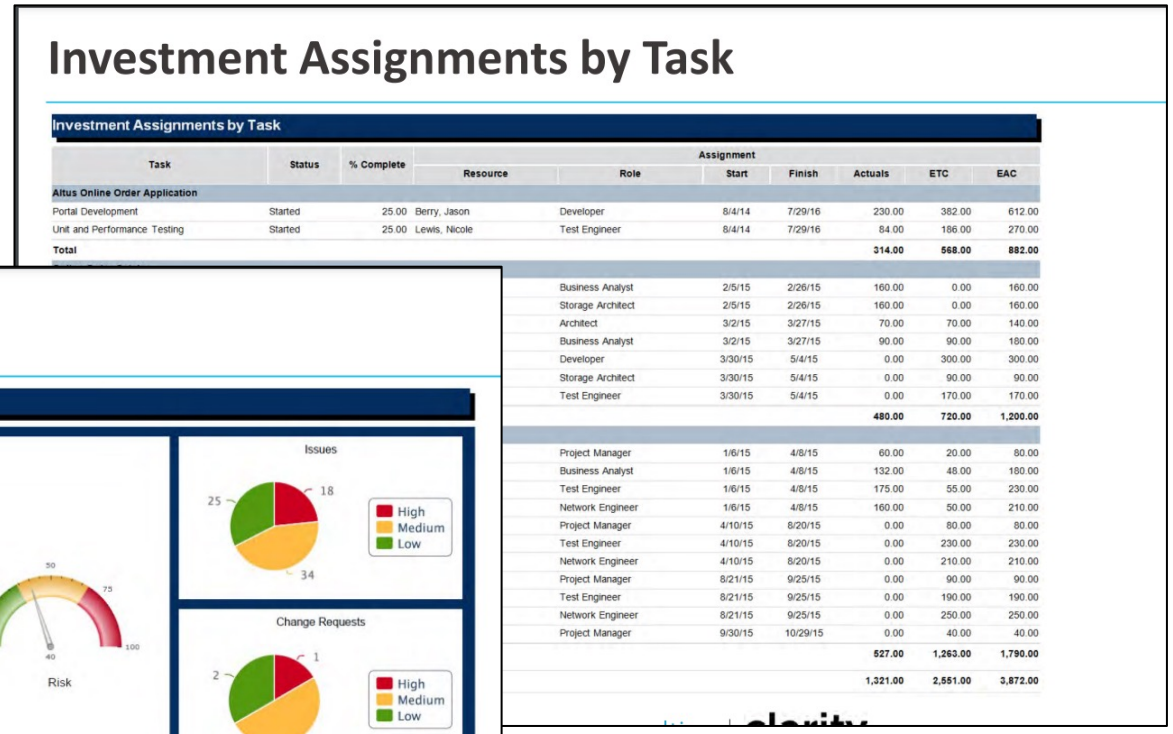
Resource Workloads

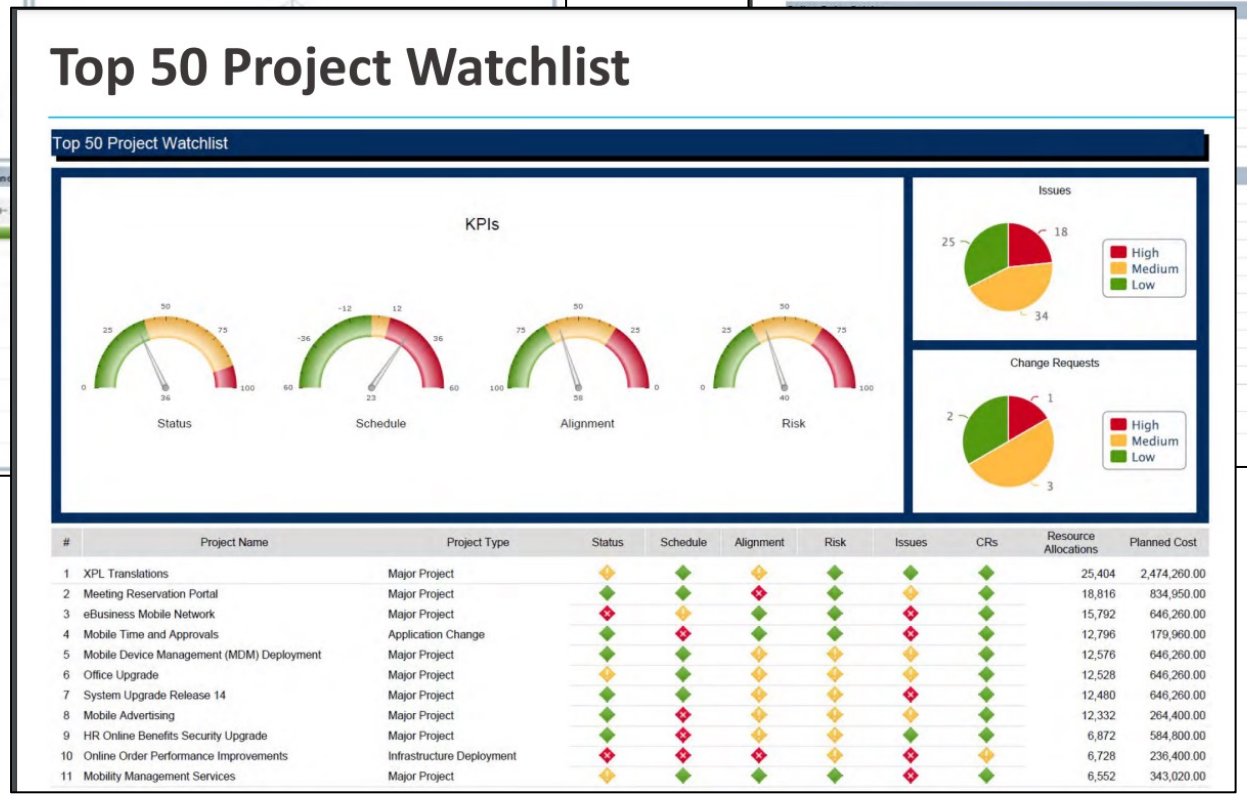
Resource	Primary Role		Availability, Allocation, & Actuals	Jan 18	Feb 18	Mar 18	Apr 18	May 18	Jun 18	Jul 18	Aug 18	Sep 18	Oct 18	Nov 18	Dec 18	Manager
Abbott, Paul	Manager/Supervisor		Availability Rate	184.00	160.00	176.00	168.00	184.00	168.00	176.00	184.00	160.00	184.00	176.00	168.00	Fedele, Mark
			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									



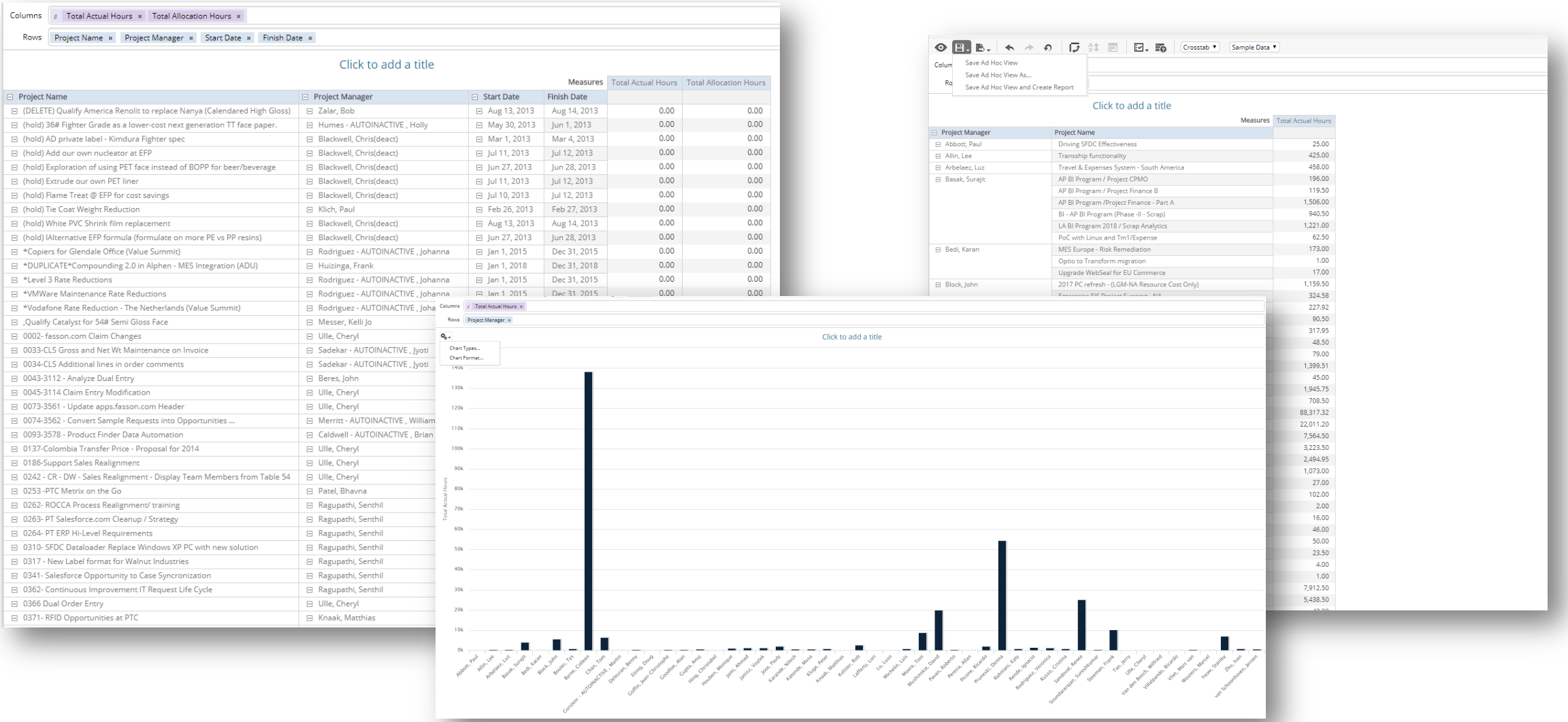
Studio Report Examples







Jaspersoft Ad Hoc Examples



Integrated BI Tools

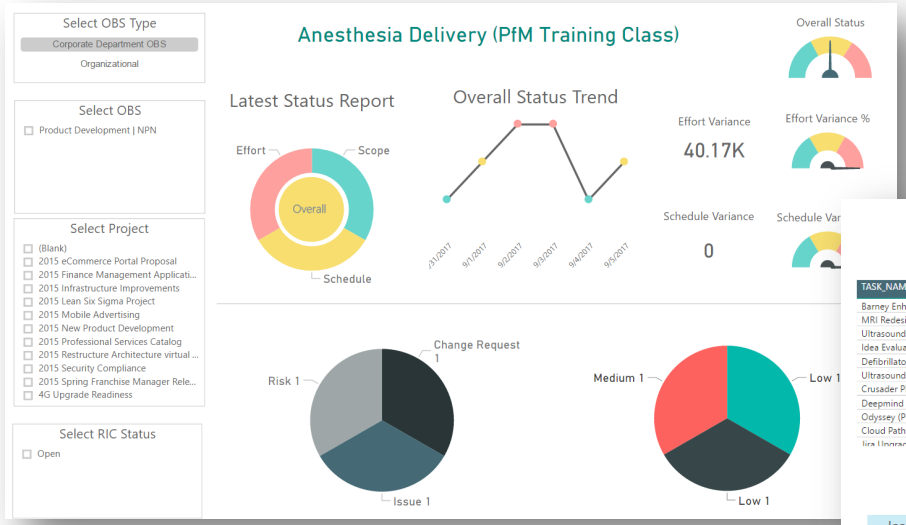
Enterprise BI

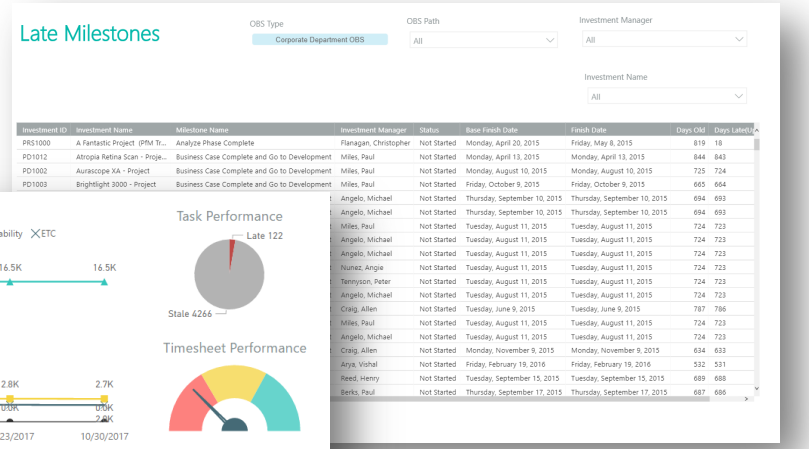
- Many organizations have an enterprise BI tool within their reporting landscape. It is important to define how Clarity fits into the enterprise standards.
- Gartner magic quadrant BI platforms include:
  - Microsoft PowerBI
  - Tableau
  - Qlik View
- If you are an on-premise implementation, you can connect directly to the built-in data warehouse.
- If you are a SaaS implementation, you have several options for connecting:
  - OData Connection *(Enhanced AWS OData connection coming soon!)*
  - 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)

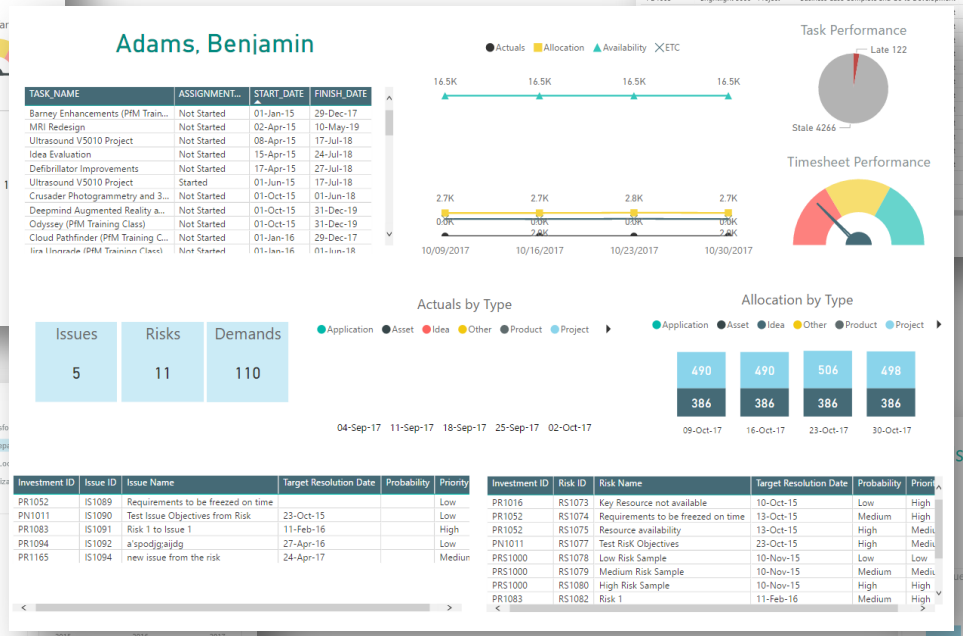
OData Direct Connection

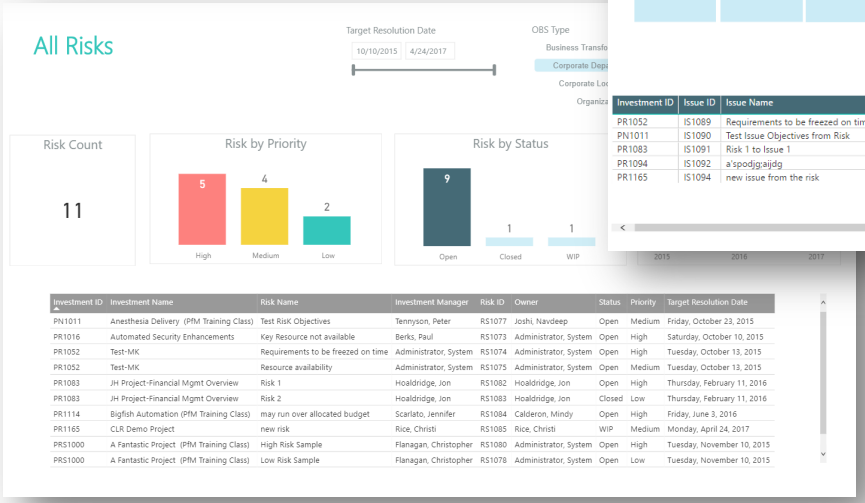
- On-Demand customers can use an OData connector to point a BI tool at the Clarity DWH.
- The connector will only go against the updated Data Warehouse
- The connector was optimized to work with PowerBI, but can used with other reporting BI tools – even Microsoft Excel
- Row level security possible with custom BI User ID on the Clarity Resource
- Ability to have individual logins for OData access

PowerBI Examples









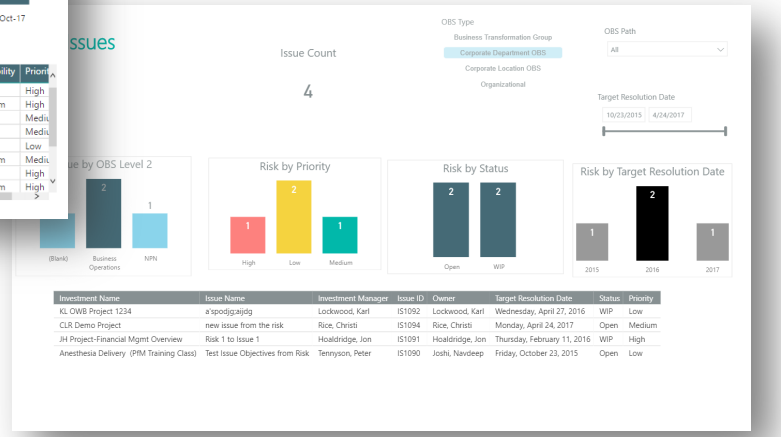


Tableau Examples

Best Practice Recommendations

Open Mic

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

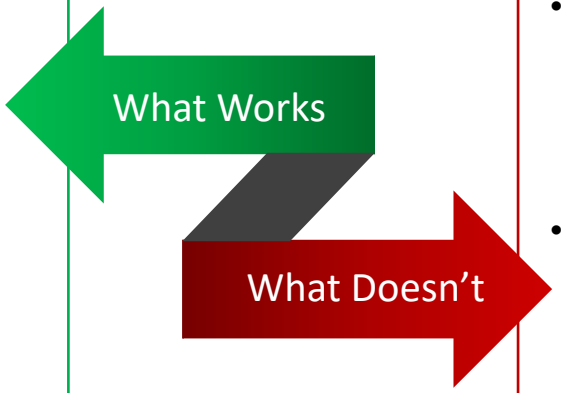
Diverse Strategy

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 Clarity, 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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