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Rally **Clarity**
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regoUniversity

SAN DIEGO • 2023

Visualization & Dashboards Best Practices & Sharing

Your Guides:

Bob Werner & Ross Hensel

Agenda

- Introduction
- Best Practices
- Rego Reporting Samples
- Customer Reporting Samples
- Questions
- Additional Resources

Introductions

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

Best Practices

Let Rego be your guide.

Accessing your data

- ODATA
 - An out-of-the-box (OOTB) way to access the data warehouse data via BI applications.
 - PROS: Easily configured/setup, easily include additional tables/fields
 - CONS: Some fields not available in DWH, some issues when accessing via Tableau, DWH jobs need to be scheduled
- Rego ODATA
 - Available to AWS hosted customers that allows access to both the DWH and transactional (query built) databases for BI applications.
 - PROS: Easily configured/setup, easily include additional tables/fields, transactional database access for small queries
 - CONS: AWS only, some fields not available in DWH, Rego ODATA job and DWH jobs need to be schedule
- Portlet Pages
 - Real-time object, OOTB or custom developed portlets displays on a single page to present a real-time dashboard.
 - PROS: Easily setup, real-time data access
 - CONS: Limited visualizations, limited to Clarity users
- On-site DWH
 - Custom-developed process to extract data from Clarity and send it onsite to a DWH.
 - PROS: Ability to marry Clarity data with other data stored onsite
 - CONS: Time-consuming setup process, SFTP + DBA teams needs to be involved

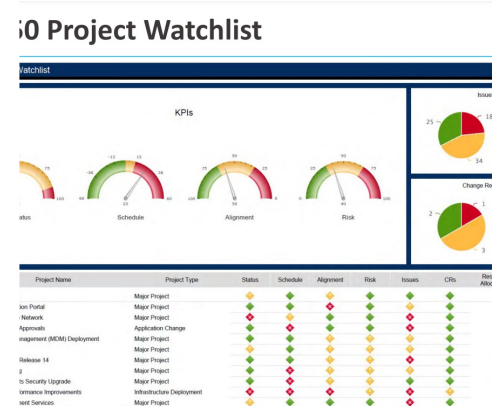
Choose your fighter

Portlets



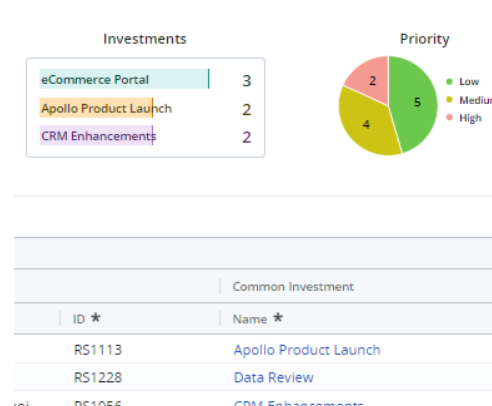
- Live Data
- Reports are operational, used day-to-day
- The data does not need to be accessed by non-Clarity users
- Data is rendered within acceptable performance thresholds
- The number of data elements required does not negatively affect the usability.
- Personalization features available

Jasper Reports



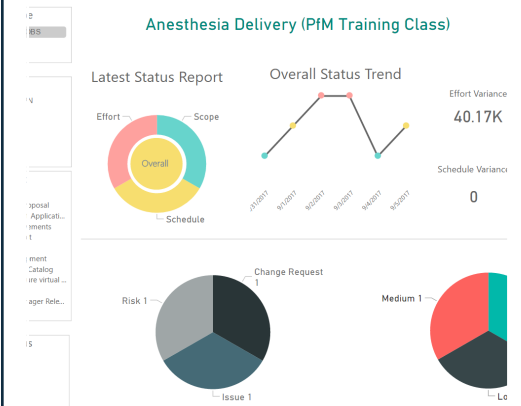
- Data sourced from Clarity DWH as default
- PDF or other non-CSV formats needed
- Requires "pixel perfect" formatting
- Report access outside of Clarity required
- Archiving is required
- Multiple reports required and presented as a single package
- Large number of calculations

In UI Views and Widgets



- Live Data
- Reports are operational, used day-to-day
- The data does not need to be accessed by non-Clarity users
- Filter options over the live data
- End user configurable for quick changes in layout or type
- No maintenance and constantly being improved by each release

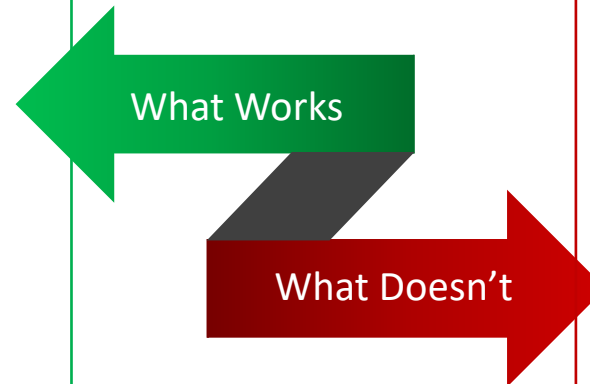
Integrated BI Solutions



- 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..)

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, PowerBI, Tableau, etc..)
- Converting excel reports that are already operationalized and moving them into the tool can gain big benefits
- Automation of report delivery
- Frequent updates- daily at the latest is best
- 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

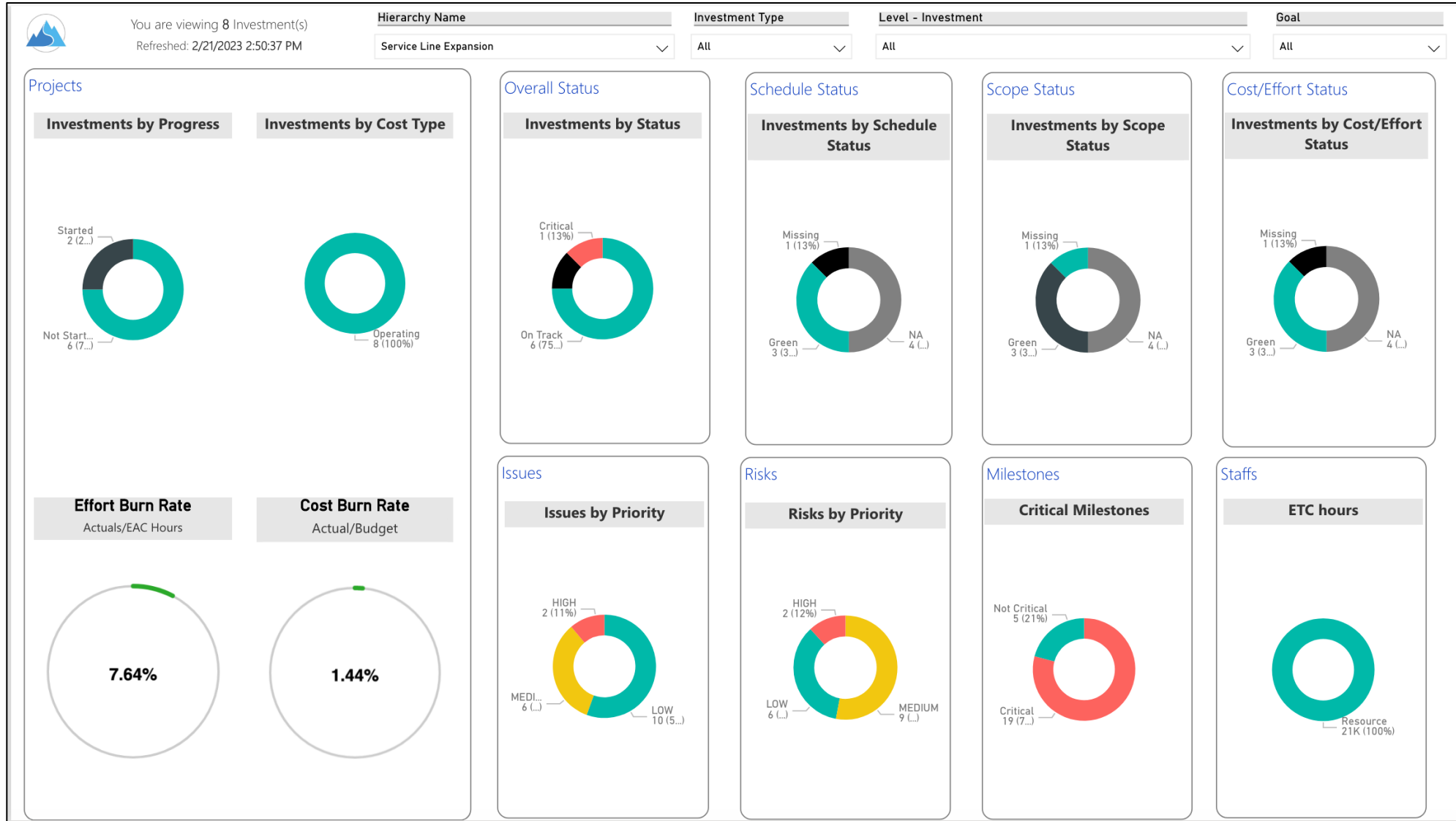


- Having people go into the tool to pull out extracts and fish for the data
- Developing reports that have too many data columns, which can cause the report to lose its purpose
- Having scenarios where the user is taking a report from the system, copying and pasting parts of it into a ppt/excel, and 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

Rego Reporting Samples

Let Rego be your guide.

Hierarchy



Hierarchy - Staffing

You are viewing 91 Investment(s)
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Hierarchy Name: All

Investment Type: All

Level - Investment: All

Goal: All

Unfilled Role?: All

Task Summary

237

Resources/Roles

2M

ETC Hours

55

With Actuals

2M

ETC Hours

215

With ETC Hrs

2M

ETC Hours

View resources/Roles by:

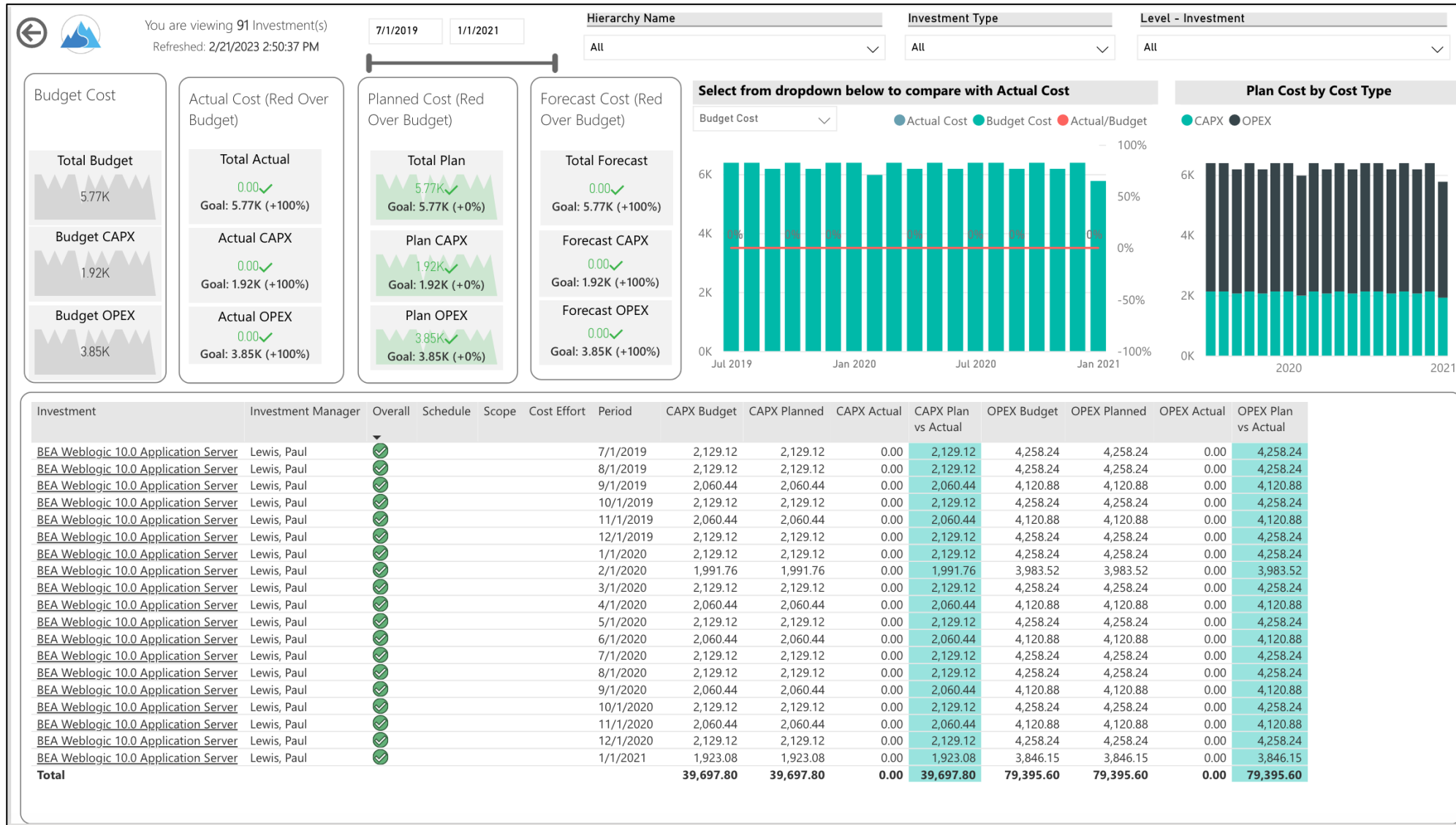
Primary Role	Vendor	Category	Employment Type
(Blank)			92
Developer			14
Test Engineer			13
Architect			11
Project Manager			10
Business Analyst			8
Network Engineer			6

Assigned Primary Roles -> Resources -> Tasks

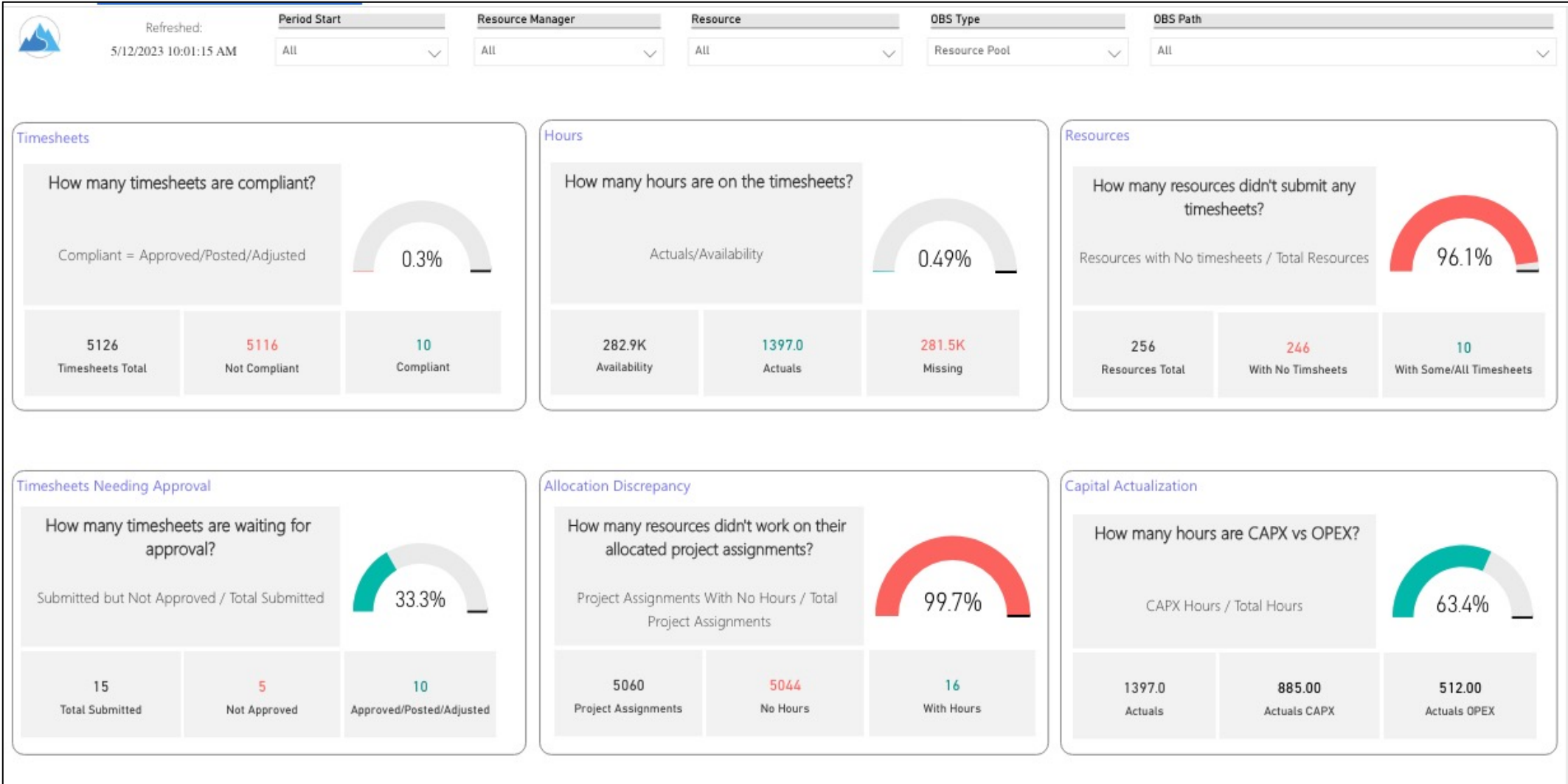
Primary Role	Actuals	Pending Actuals	Base Hours	ETC Hours	Pending ETC Hours
Travel Expenses	0.00	0.00	0	0	0.00
Travel	0.00	0.00	0	0	0.00
Travel Expense	0.00	0.00	0	0	0.00
Travel	0.00	0.00	0	0	0.00
Requirements Definition	0.00	0.00	0	0	0.00
Identify Infrastructure Requirements	0.00	0.00	0	0	0.00
DSEO ADMIN	0.00	0.00	0	0	0.00
Another Task	0.00	0.00	0	0	0.00
Test Engineer	720.00	78.00	21,665	25,691	132.00
Walker, Terry	368.00	40.00	540	1,254	132.00
Total	12,852.07	2,882.24	746,989	2,094,306	469.00

Investment	Investment Manager	Overall	Schedule	Scope	Cost Effort	Resources /Roles	Allocations	Hard Allocations	Soft Allocations	Actuals	Pending Actuals	Base Hours	EAC Hours	Pending EAC Hours	ETC Hours	Pending ETC Hours	ACWP Cost
ZTest - MC Program	Administrator, Clarity						0	0	0								
Zero Harm Continually Improve Care	Administrator, Clarity						0	0	0								
Z - MC - Ongoing Expenses	Administrator, Clarity						0	0	0								
Yescarta (axi-cel)	Administrator, Clarity					4	2,816	0	2,816	0.00	0.00	0	2,712	0.00	2,712	0.00	\$0
Yack Integration project	Administrator, Clarity	✓				7	3,941	0	3,648	0.00	0.00	1,400	1,560	0.00	1,560	0.00	\$0
XPL Translations	Reed, Henry	✓				4	93,051	135,000	92,151	0.00	0.00	10,176	14,414	0.00	14,414	0.00	\$0
x Oracle DB	Administrator, Clarity						0	0	0								
Would Recommend Hospital	Administrator, Clarity						0	0	0								
Windows Enterprise Server	Miller, Veronica	⚠					0	0	0								
Web Based Training	Administrator, Clarity						0	0	0								
Web Based Trading	Riviera, Alex		✓	⊖	⊖	16	118,466	0	118,466	240.00	0.00	81,120	114,178	0.00	113,938	0.00	\$33,600
Web Application Enhancement	Sutherland, Joy	✓	⊖	⊖	⊖	8	54,498	157,926	53,445	7.00	32.00	1,320	1,320	32.00	1,313	0.00	\$1,050
Weather Monitoring Warning systems 2.6	Martin, Paul	✓				8	47,185	0	47,185	0.00	9.00	48,320	48,320	9.00	48,320	0.00	\$0
Weather Dopler	Martin, Paul	✓	⊖	⊖	✓	8	26,061	0	23,900	60.00	40.00	354,309	354,359	40.00	354,299	0.00	\$0
Wearables	Parks, Michael		⊖	⊖	✓	1	8	0	8	0.00	0.00	0	8	0.00	8	0.00	\$0
Voltage Regulators	Martin, Paul						0	0	0								
Voice Recognition Feature	Flynn, Sam					1	0	0	0	0.00	0.00	0	0	0.00	0	0.00	\$0
Visidium 2000	Tennyson, Peter	✓					0	0	0								
Vignette Portal	Lewis, Paul	✓				2	8,336	0	8,336	0.00	0.00	0	8,336	0.00	8,336	0.00	\$0
View Special Offers	Flynn, Sam					1	0	0	0	0.00	0.00	0	0	0.00	0	0.00	\$0
Verizon TSMA	Matthews, April						0	0	0								
Variance Reporting	Thompson, Peter						0	0	0								
Value Improvement	Administrator, Clarity						0	0	0								
Value Experience Project	Administrator, Clarity						0	0	0								
Value Engineering Template	Administrator, Clarity					1	8	0	8	0.00	0.00	0	8	0.00	8	0.00	\$0
Vacation Time	Administrator, Clarity	✓				24	20,045	1,320	20,036	56.00	164.00	0	11,860	164.00	11,804	0.00	\$9,200
User ID tracking App	Martin, Paul	✓				1	0	0	0	0.00	10.00	0	8	10.00	8	0.00	\$0
Total						237	4,042,947	10,694,893	3,902,322	12,852.07	2,882.24	746,989	2,107,159	3,351.24	2,094,306	469.00	\$1,993,...

Hierarchy - Financials



Timesheet



Timesheet - Detail

You are viewing 255 resources from 14 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start
All

Resource Manager
All

Resource
All

OBS Type
Corporate Departme...

OBS Path
All

Timesheets Summary

2550
Total

13
Open

2532
Missing

4
Submitted

0
Returned

1
Approved/Posted/Adjusted

Show me open timesheets by: Resource Manager Resource OBS Resoure Class Employment Type Vendor Department Primary Role

Click anywhere on the charts to filter the detailed resource list:

Open Timesheets Trend

● (Blank) ● Account Manager ● Architect ● Architect PS ● Business Analyst ● Business Arch... ● Champion ● Coach ● DBA ▶

Open Timesheets

Role	Count
(Blank)	240
SME	200
Project Manager BT	160
Developer	140
Engineer	140
Project Manager	140
Test Engineer	118
Architect	108
Business Analyst	80
Network Engineer	70
Product Manager	60
Team Lead	60
Champion	59

Who are the **255** resource(s) with **2290** missing timesheets?

Resource Manager	Resource	Period Start	Timesheet Status	Booking Manager	Department	Primary Role	Resource Class	Vendor	OBS Type	OBS Path
Administrator, Clarity	Pokorny, Mike	1/23/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	1/30/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/6/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/13/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/20/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	2/27/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	3/13/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	3/20/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Administrator, Clarity	Pokorny, Mike	3/27/23	Open		IT	Champion	Internal Labor		Corporate Department OBS	IT
Hensel, Ross	Abbott, Karl	1/23/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Hensel, Ross	Abbott, Karl	1/30/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Hensel, Ross	Abbott, Karl	2/6/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Hensel, Ross	Abbott, Karl	2/13/23	Open		Product Management PPM	SW Engineer	Internal Labor		Corporate Department OBS	Product Management Product Management PPM
Total			Open							

Timesheet – Hours Detail

You are viewing 255 resources from 14 manager(s)
Last Refreshed: 3/16/2023 5:44:56 PM

Period Start: All | Resource Manager: All | Resource: All | OBS Type: Corporate Departme... | OBS Path: All

What's the weekly trend?

Hours by Time Period

● Availability ● Actuals ● Allocation

Show me: **Actuals** | Allocations

Sliced by: Investment Type | Investment Manager | Cost Type | Priority | Department | Charge Code

Top consuming Investments & Tasks

Investment | Task

Select a manager
Who has the most missing hours?

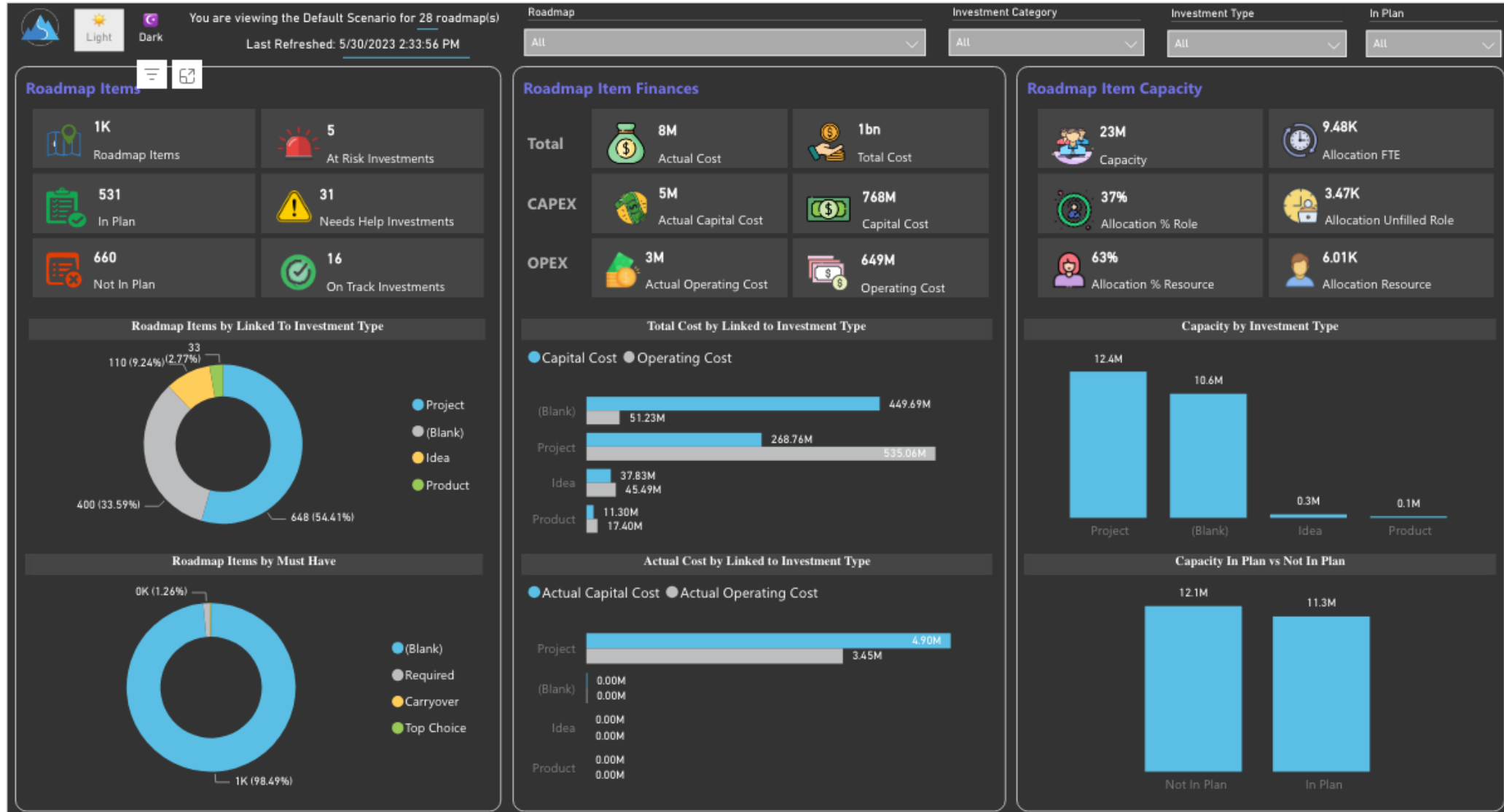
Missing Hours by Manager

View resource details
How are his/her resources entering time and allocations?

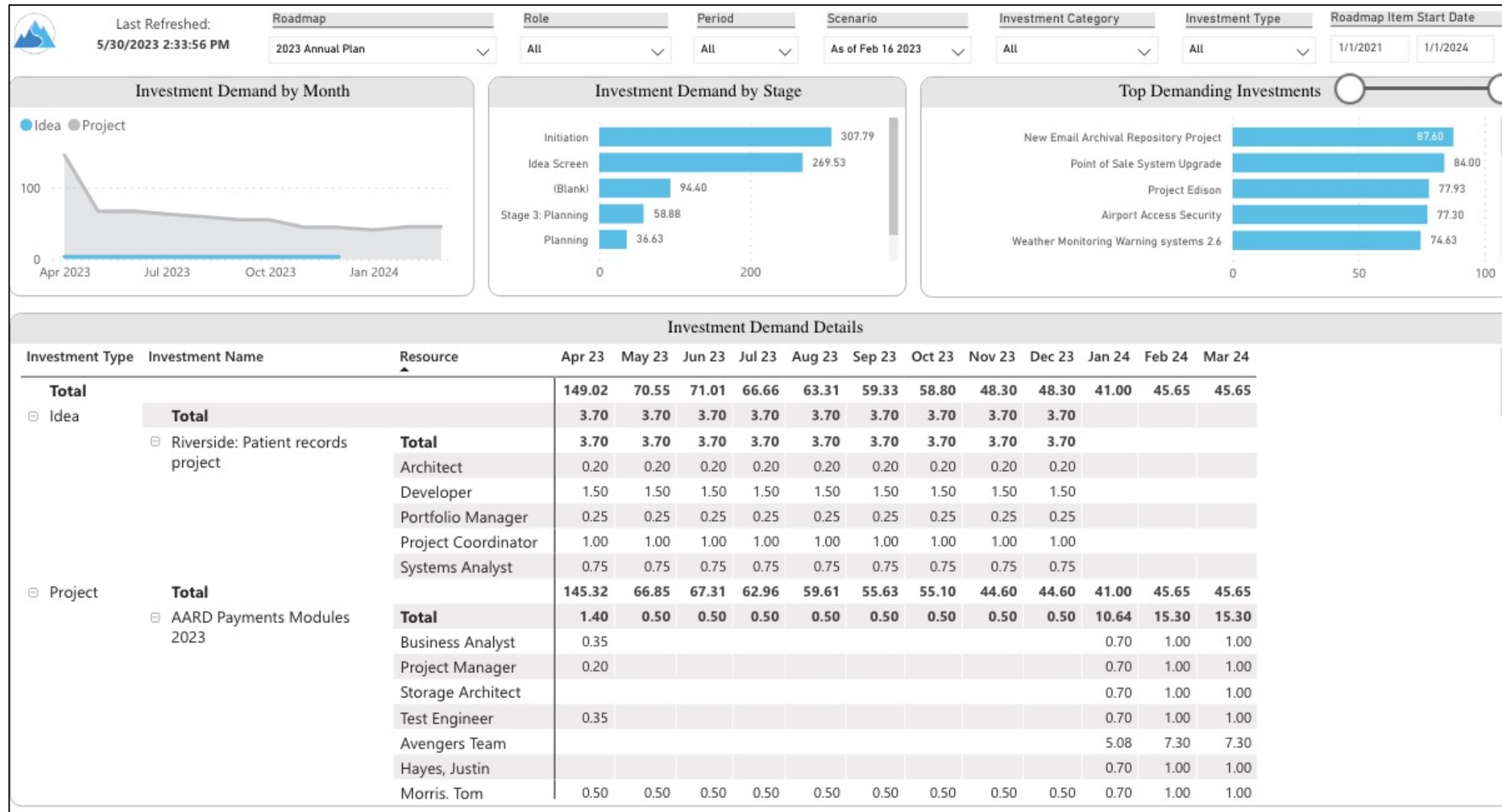
Hours by Week and Resource Manager

Resource Manager	Resources	Availability	Entered	Compliance %	Missing	Utilization %	Allocation	Allocation %	Act vs Avail	Act vs Alloc	Avail vs Alloc
Administrator, Clarity	1	400.0	525.0	10.0%	-125.0	131.25%	2,200.0	550.0%	125.0	-1,675.00	-1,800.00
Pokorny, Mike	1	400.0	525.0	10.0%	-125.0	131.25%	2,200.0	550.0%	125.0	-1,675.00	-1,800.00
Administrator, Clarity						0.00%					
Gubeno, Dave						0.00%					
Morgan, Christi						0.00%					
Test NK, Test NK						0.00%					
Miller, Rosie	71	27,842.0	38.0	0.6%	27,804.0	0.14%	25,472.3	91.5%	-27,804.0	-25,434.32	2,369.68
Moreau, Erin	1	400.0	38.0	20.0%	362.0	9.50%	800.0	200.0%	-362.0	-762.00	-400.00
Agile, Andre	1	400.0	0.0	0.0%	400.0	0.00%	1,056.0	264.0%	-400.0	-1,056.00	-656.00
America, Captain	1	392.0	0.0	0.0%	392.0	0.00%	349.1	89.1%	-392.0	-349.15	42.85
Total	254	142,862.0	572.0	0.2%	142,290.0	0.40%	134,727.9	94.3%	-142,290.0	-134,155.93	8,134.07

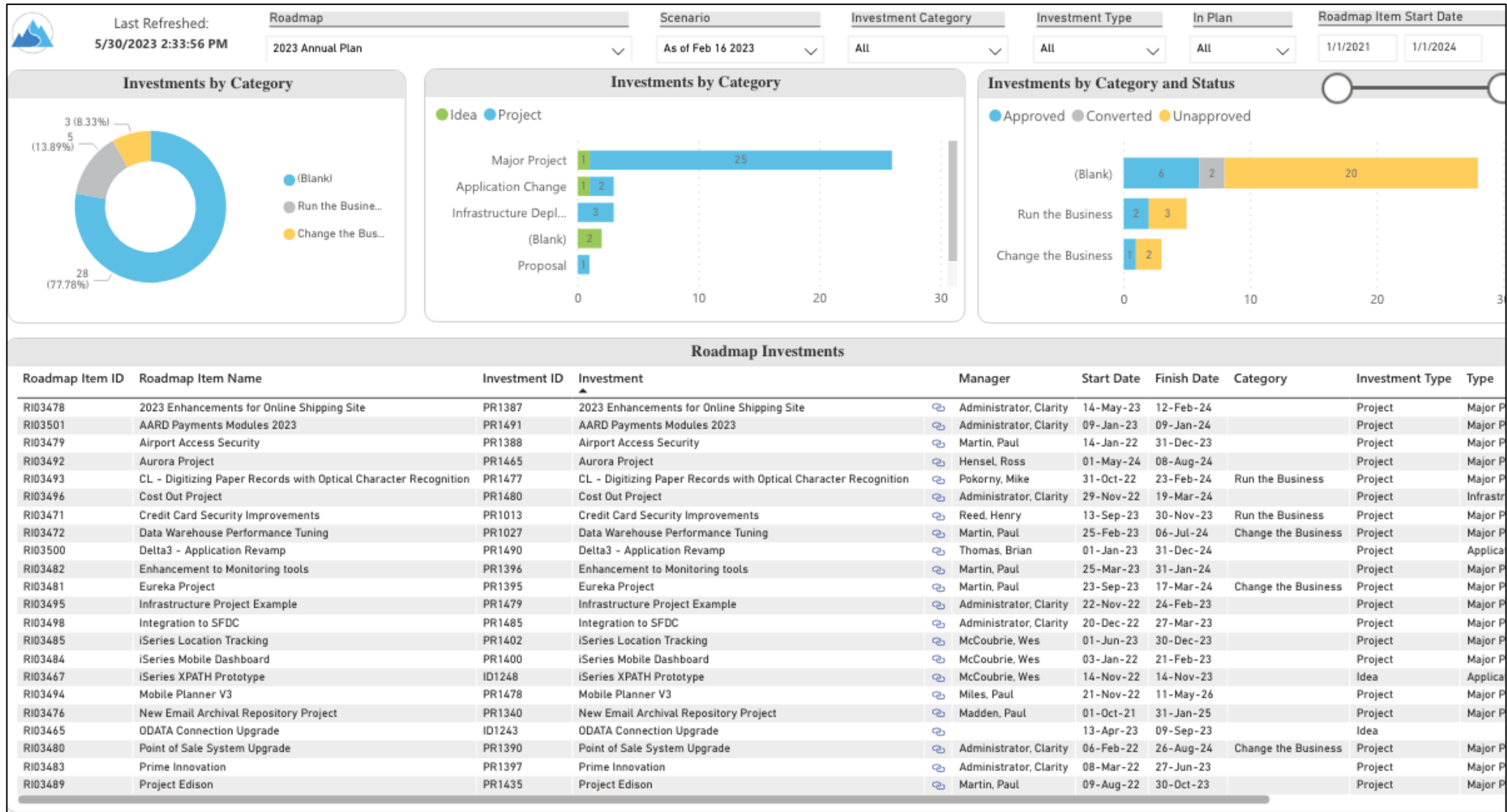
Roadmaps



Roadmap – Resource Demand



Roadmap – Investment Detail



Client Reporting Samples

Let Rego be your guide.

Additional Resources

- Rego Webinars:
 - Rego's Free Clarity Power BI Dashboards: A Deep Dive – Part 1
 - Rego's Free Clarity Power BI Dashboards: A Deep Dive – Part 2
 - Winning Reporting Strategies
- Rego Free Trainings:
 - PowerBI (repeats monthly)
 - Jaspersoft (repeats monthly)

* Email Clarity@Broadcom.com to register

Questions?



Surveys

Please take a few moments to fill out the class survey.
Your feedback is extremely important for future events.



Thank You For Attending Rego University

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 Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- 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.



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