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regoUniversity

SAN DIEGO • 2023

Visualization Strategies in the Modern UX

Your Guides:

Bob Werner and Matthew Palicki

Agenda

- Welcome & Introduction
- Value Propositions & Client Stories (40 min)
 - Jaspersoft / Ad Hoc Reports
 - Channels
 - Widgets/Saved Views
 - Status Reports
 - Canvas
 - PowerBI
- Developing a Visualization Strategy (15 min)
- Q&A

Demonstration & Value Propositions

Advanced Reporting

Traditional Reporting Schedulable and deliverable via multiple mediums

Clarity PPM

Advanced Reporting - Job List

Library View Manage Create

Weekly On Monday

Schedule For: /ca_ppm/reports/project_management/CSK_PRJ_StatusReportList

Schedule Start

Start Date:

Immediately

On Specific Date:

2023-03-28 00:00

Time Zone:

America/New_York - Eastern Standard Time

Recurrence

Recurrence Type:

Simple

Repeat every (required):

7 days

Schedule End

End Date:

Run a set number of times

Number of runs:

Save Cancel

Clarity PPM

Advanced Reporting - Job List

Library View Manage Create

Weekly On Monday

Schedule For: /ca_ppm/reports/project_management/CSK_PRJ_StatusReportList

Output File Options

File name (required):

CSK_PRJ_StatusReportList

Description:

Time Zone:

America/New_York - Eastern Standard Time

Output Locale:

en_US - English (United States)

Formats:

CSV HTML RTF

DOCX ODS XLSX

Excel (Paginated) ODT XLSX (Paginated)

Excel PDF PPTX

CSV Metadata

File Handling:

Overwrite Files

Sequential File Names by Timestamp

Timestamp Pattern:

Save Cancel

Channels

External Content Link Setup

clarity ← Blueprint Simple Work Management - EDIT MODE

Properties Visuals **Modules** Rules Actions Create from Template

Exit Discard Edits Publish

Modules

Search...

New Channel New Canvas

- Action Items
- Agreements
- Assignments
- Audit
- Baselines
- Change and impact
- Changes
- Charter
- Checklists
- Compliance
- Conversations
- Decisions
- Properties
- Documents

Drag to select and reorder modules.
The first 4 modules appear on Project Tiles.

Configure - Resource Reporting

Channel Name *

Resource Reporting

Channel Uri *

https://clarity-train.regoconsulting.moventus.com/niku/mu?action=psa.resUtilization

Referrer URLs

Comma Separated

Single Sign On URL

Sign On URL for Identity Provider or Service Provider initiated authentication for target application

Preview Delete Channel

External link view Live

clarity ← Project Work Management Check List Project PR1533

Overview To Dos Conversations Documents Checklists Properties **Resource Reporting**

ACTUAL UTILIZATION FORECASTED UTILIZATION RESOURCE BOOKING VARIANCE REPORT MARGIN REPORT

Resource Utilization: Actual Utilization

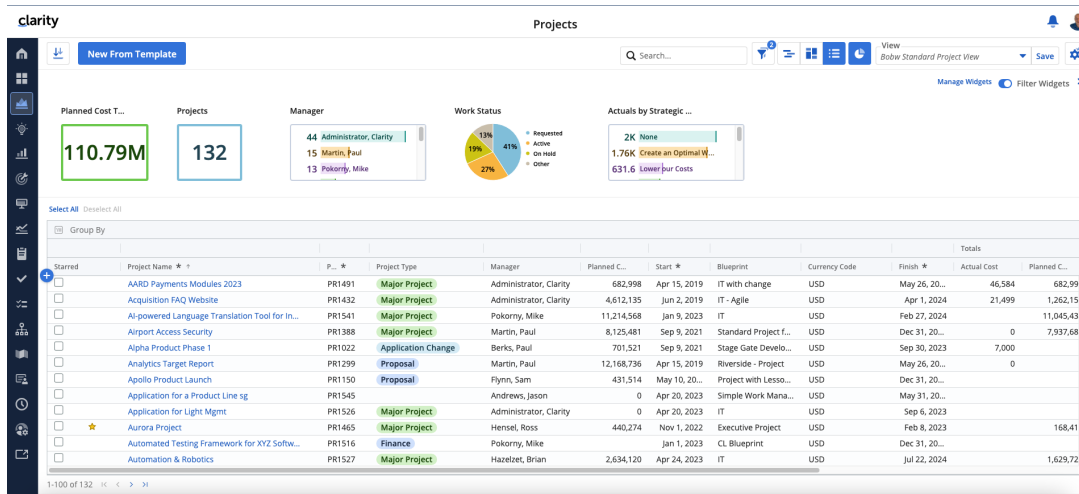
RESOURCE OBS Resource Pool:Professional S # START DATE 27/7/23 END DATE 12/31/23 FILTER VIEW

> Actual Utilization by Resource

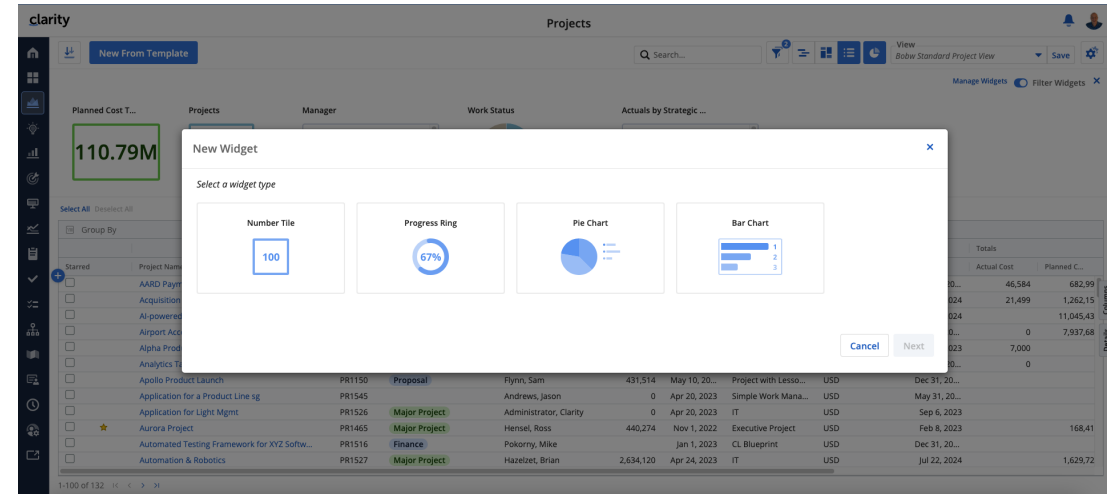
Resource	Actuals	Availability	Utilization	Actuals	Availability	Utilization	Actuals	Availability	Utilization	Actuals	Availability	Utilization	Actuals	Availability	Utilization	Actuals	Availability	Utilization
Professional Services	601.6	3,528.0	17.1%	262.4	3,864.0	6.8%	0.0	3,528.0	0.0%	0.0	3,696.0	0.0%	0.0	3,696.0	0.0%	0.0	3,528.0	0.0%
Consulting Services	0.0	1,344.0	0.0%	0.0	1,472.0	0.0%	0.0	1,344.0	0.0%	0.0	1,408.0	0.0%	0.0	1,408.0	0.0%	0.0	1,344.0	0.0%
Implementation Services	601.6	1,680.0	35.8%	262.4	1,840.0	14.3%	0.0	1,680.0	0.0%	0.0	1,760.0	0.0%	0.0	1,760.0	0.0%	0.0	1,680.0	0.0%
Outsourcing	0.0	504.0	0.0%	0.0	592.0	0.0%	0.0	504.0	0.0%	0.0	528.0	0.0%	0.0	528.0	0.0%	0.0	504.0	0.0%

Widgets/Saved Views

Widgets and Views



Widget Config



Status Reports

Configure, Export and Email

clarity Status Reports 🔔

🔍
📄
📊
View
Grouped By Goal
▼
Save
⚙️

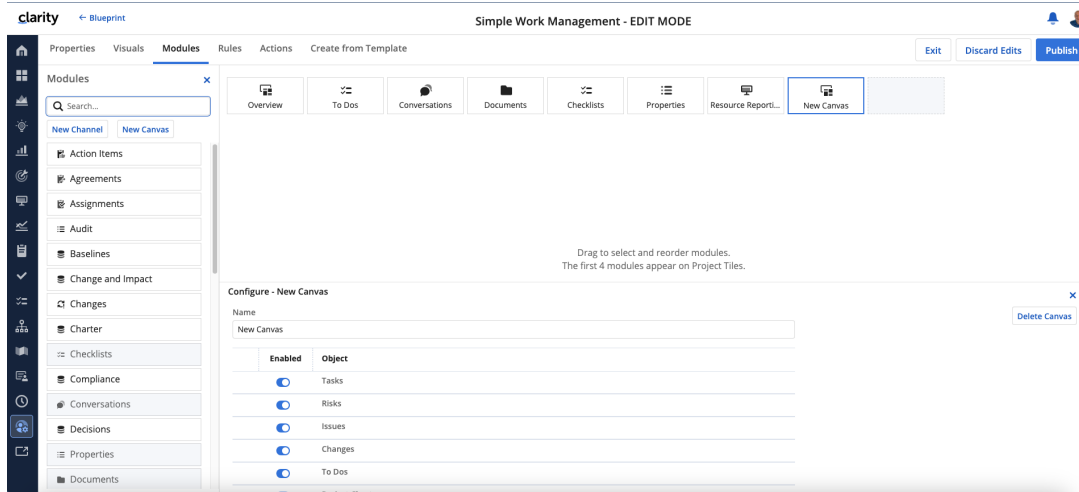
Select All Deselect All 3 Items Selected Edit Delete Export To PDF

Common Investment		Status Reports								
Group	Name	Investment ID	L	Report Date	Next Milestone on Track	Cost and Effort Status	Overall Status	Schedule Status	Scope Status	Status Re Update
> None	(7)		7		0		400			
> Cost Avoidance	(4)		4		1		200			
> Cost Reduction	(4)		4		1		160			
> Grow the Bus...	(21)		21		5		980			
> Infrastructure ...	(2)		2		0		130			
▼ Maintain the B...	(4)		4		1		160			
<input checked="" type="checkbox"/>	Global HR Application Maintenance	PR1025	✓	Jul 4, 2019	✓	On Track	On Track	On Track	On Track	Project that in scope, beyond baseline
<input checked="" type="checkbox"/>	IoT Implementation for Smart Home Automation	PR1477	✓	Jun 15, 2023		On Track	Needs Help	Needs Help	At Risk	We are with P deliver some issues, mitigation in place
<input checked="" type="checkbox"/>	Minimal Online Shopping Site	PRS1012	✓	Jan 10, 2019		On Track	On Track	On Track	On Track	On track funding came recent with the

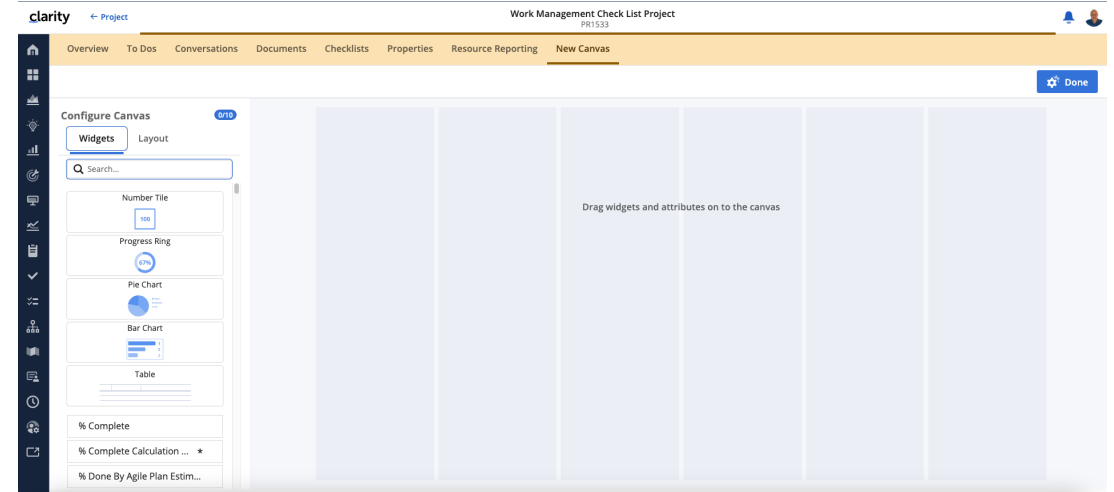
1 - 10 of 10 ⏪ ⏩

Canvas

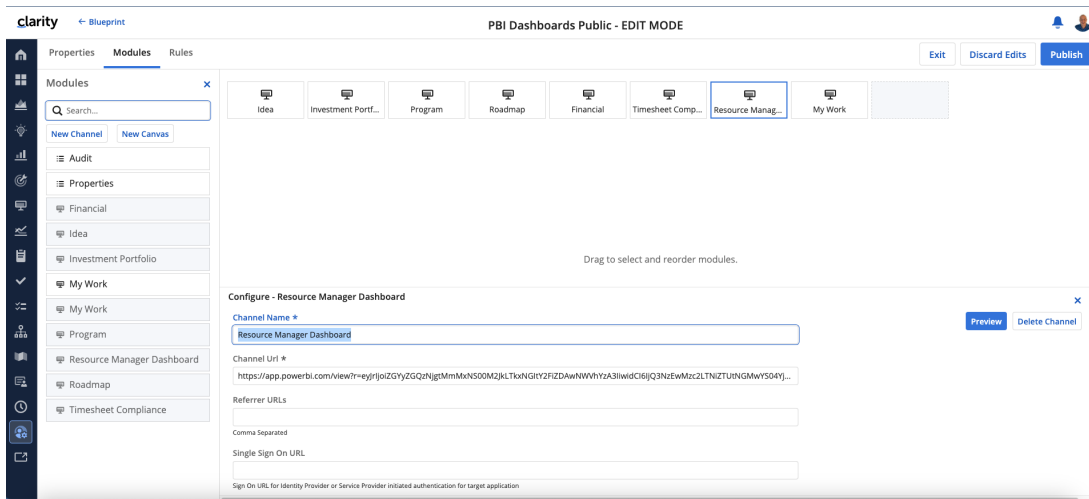
Canvas Config Blueprint



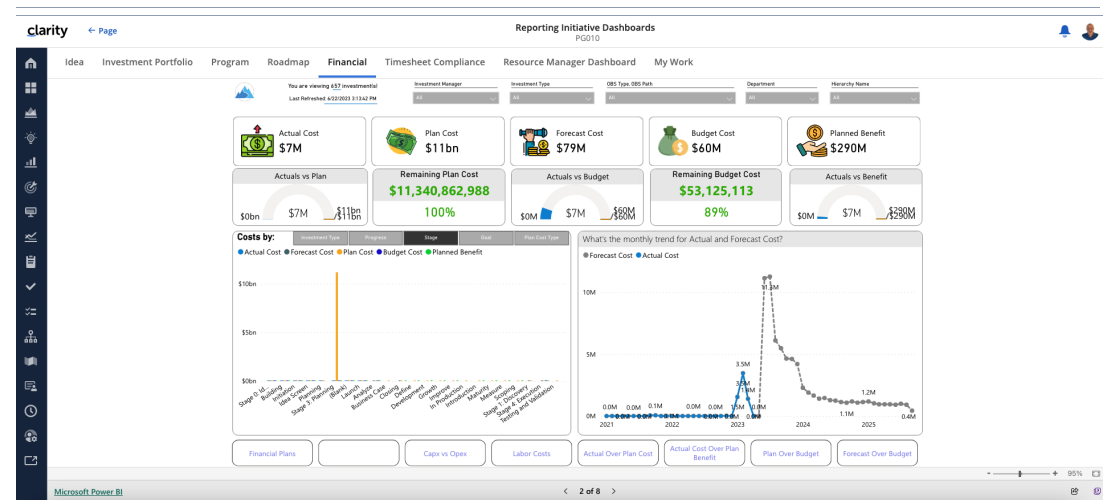
Canvas Config Individual



Config Pages to include Power BI



Power BI within Clarity



Developing Your Visualization Strategy

Planning Your Visualization Strategy

- Identify all personas who have visualization needs
- Obtain VoC on current state existing reports and any known gaps
- Document the business questions/decisions seeking to be solved
- Map out by functional area the known visualization needs for each persona
- Identify for each persona if self-service, automated, or hybrid
- Design “MVP” for each identified visualization
- For automated, identify the format and cadence
- Validate security requirements and access rights needed
- Build highest priority visualizations
- Test and validate / Iterate and adapt
- Determine which legacy reports can be consolidated/replaced/retired

Persona Examples

Persona	Questions/Decisions to be solved	Functional Areas	Visualization Format(s)	Self-Service, Automated, or Hybrid?	If automated, what is the preferred method/cadence of delivery?	Comments or Special Requests
Executive; "Road Warrior"	Are we delivering value? Are we achieving the desired outcomes? Are we managing our financial targets? Where will we anticipate staffing issues?	Hierarchies Roadmaps Dashboards/Canvas	Jaspersoft Reports, PowerBI Dashboard	Hybrid	- Portfolio Performance Reports; PDF emailed weekly Monday morning - OKR Dashboard, KPIs; on demand through mobile app/PowerBI	This executive not likely to go into the tool themselves. Prefers "white-glove" tailored reports delivered
Executive; "Tech Guru"	Are we delivering value? Are we achieving the desired outcomes? Are we managing our financial targets? Where will we anticipate staffing issues?	Hierarchies Roadmaps Dashboards/Canvas	Saved Views, Canvasses, PowerBI Dashboard	Self-Service		This executive prefers being able to go into the tool themselves
Portfolio Manager; Strategy	How is the work in the pipeline supporting Strategy? Do we have the right balance/mix of investments? Where will we anticipate staffing issues? Where are my best options to pivot if needed?	Hierarchies Roadmaps Dashboards/Canvas Staffing	Saved Views, Canvasses	Self-Service		Develop Widgets and Saved Views based on their requirements.
Portfolio Manager; Financial	What is our burn rate for capex and opex? Which investments are At Risk for Budget? Are chargebacks being properly applied?	Hierarchies Dashboards/Canvas Timesheet/Billing Reports	Saved Views, Canvasses	Hybrid	Timesheet/Billing reports PDF emailed on 3 rd business day EOD	Develop Widgets and Saved Views based on their requirements. Validate field level security requirements.
PMO Lead	Which Projects are operating outside parameters? What Risks and Issues require attention? What Change Requests need reviewed? Where do we have data quality issues?	Dashboards/Canvas Hierarchies Projects Views My Work/Action Items	Saved Views, Canvasses, Jaspersoft Reports	Hybrid	R/I/C Exception Reports delivered by PDF email weekly on Monday morning	Each PMO will have unique requirements here
Delivery Lead	What are my people working on? Who is Over/Under Allocated? What demand has not yet been fulfilled? What Projects are operating outside parameters?	Staffing Projects Views	Saved Views	Self-Service		

Additional Resources

Some Related RegoU Sessions

[“Visualizations and Dashboards: Best Practices” – Wednesday 10:10am, Constellation B](#)

[“PowerBI ad hoc: Beginner” – Wednesday 9:00am, Sovereign](#)

Product Articles / E-Books / Webinars

<https://www.broadcom.com/products/software/value-stream-management/clarity>

<https://academy.broadcom.com/valueops/clarity>

<https://info.regoconsulting.com/clarity-ppm-best-practice-camp-winning-reporting-strategies>

<https://info.regoconsulting.com/enhance-your-clarity-data-visualization-and-analysis-with-regos-free-clarity-bi-dashboards-22-august-2023>

<https://xchange.regoconsulting.com/> (NEW AND IMPROVED!!)

Books

[Accelerate: Building Strategic Agility for a Faster-Moving World, John P. Kotter](#)

[Out of the Crisis, W. Edwards Deming](#)

[Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation, Martin/Osterling](#)

[The 4 Disciplines of Execution, McChesney/Covey/Huling](#)

SAFe

<https://scaledagileframework.com/lean-portfolio-management/>

<https://scaledagileframework.com/portfolio-flow/>

<https://scaledagileframework.com/roadmap/>

<https://info.regoconsulting.com/safe-expand-to-the-value-stream-may-2022>

Personal Growth

[From Strength to Strength, Arthur C. Brooks](#)

[The Seven Spiritual Laws of Success, Deepak Chopra](#)

[The Last Arrow, Erwin McManus](#)

[Mindset: The New Psychology of Success, Carol S. Dweck, Ph.D.](#)

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.



Phone

888.813.0444



Email

info@regoconsulting.com



Website

www.regouniversity.com