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# Visualization and Dashboards Persona-based Reporting Strategies

Your Guides:  
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# Agenda

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- Introduction
- Persona-based Reporting
- Reporting Tool Options
- Additional Resources

# Introductions

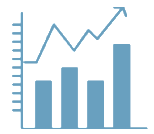
- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



# Persona Based Reporting

# Why Persona-based Reporting

 Each persona has its unique reporting needs and preferences



Tailored reports help

- Improve user adoption and engagement
- Increase efficiency
- Drive better decision-making

# How to Do Persona-based Reporting



## Understanding User Personas:

- Define and explain the various user personas within the organization who interact with Clarity PPM.
- Highlight the unique reporting needs and preferences of each persona.



## Persona Mapping and Analysis:

- Showcase examples of persona mapping and how it aligns with reporting requirements.
- Illustrate how persona analysis can help in designing customized reports for different user groups.



## Customized Reporting Solutions:

- Examples of persona-based report templates and dashboards tailored to specific user personas.



## Implementation Strategy:

- Considerations such as data segmentation, report design, and user training.

# What Are the Personas



## Leadership

Require high-level summaries and key performance indicators (KPIs) to make strategic decisions.

## Strategy

Provide dashboards with visualizations of overall project health, budget status, and strategic insights. Focus on concise, actionable data to aid decision-making at a glance.

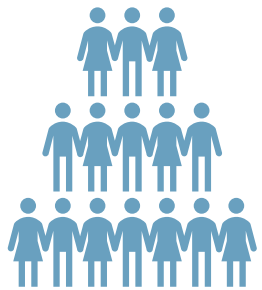


## Portfolio Managers

Portfolio managers oversee multiple projects and need portfolio-level insights and performance metrics.

## Strategy

Provide portfolio status reports, benefit realization analyses, risk exposure reports, and portfolio health dashboards. Include resource demand vs. capacity across projects, strategic alignment analyses, and portfolio risk assessments.



## Resource Managers

Resource managers focus on resource allocation, capacity planning, and team productivity.

## Strategy

Provide resource allocation reports, demand vs. capacity analysis, team workload summaries, and skill inventory reports. Include graphs showing resource utilization and availability for efficient resource management.

# What are the Personas?

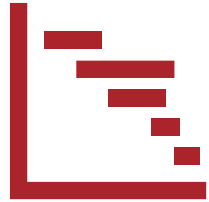


## Financial Analyst

Financial analysts require cost tracking, budget forecasting, and financial performance metrics.

## Strategy

Offer financial reports with budget vs. actuals comparisons, cost breakdowns, variance analysis, and profitability metrics. Include cost benefit analyses, and financial KPIs for financial decision-making.

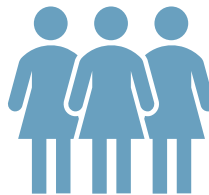


## Project Manager

Project managers need detailed project progress, resource allocation information, and risk assessments.

## Strategy

Offer detailed project reports w/ task status, resource utilization, budget tracking, and risk analysis. Include Gantt charts, resource histograms, and project variance analyses for effective project mgt.



## Team Member

Team members focus on task assignments, progress updates, and collaboration within projects.

## Strategy

Offer individual task progress reports, time tracking summaries, collaboration metrics, and team performance dashboards. Include personalized task lists, upcoming deadlines, and team communication insights.

# Leadership

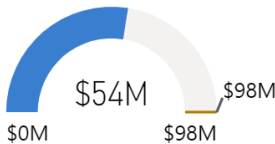
Remaining Plan Cost

77%

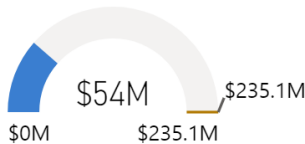
Remaining Budget Cost

45%

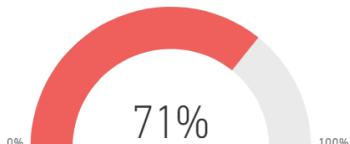
Actuals vs Budget



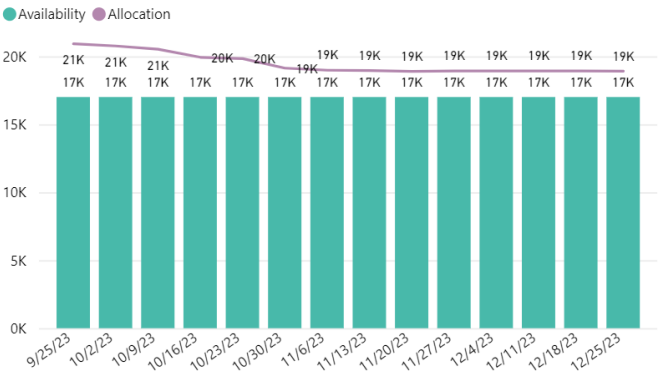
Actuals vs Plan



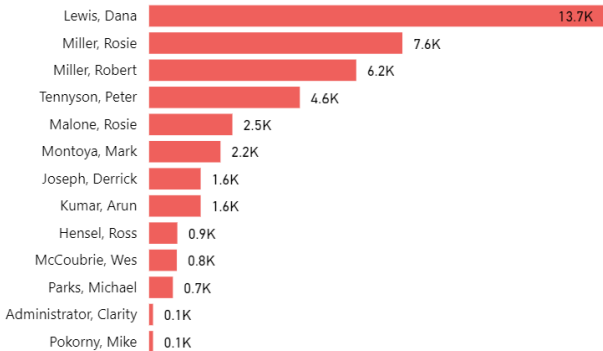
Cost Plan



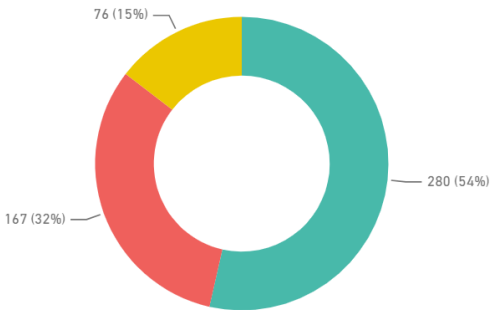
Hours by Time Period



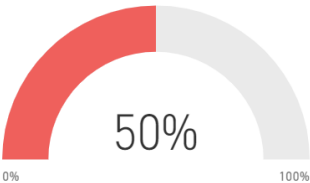
Missing Hours by Manager



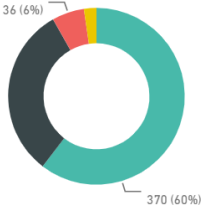
Overall Allocation Percentage – Current Quarter



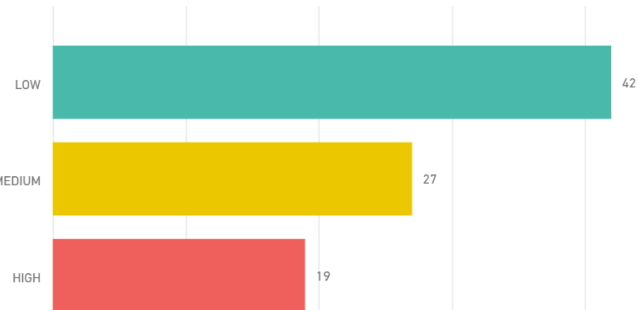
Status Reports



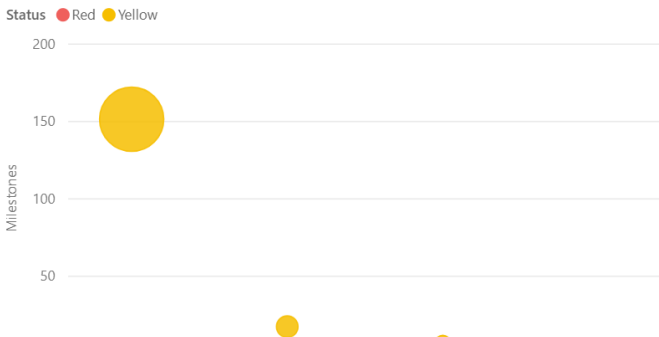
Investments by Status




How many risks are open or in progress?



Upcoming Milestones by Status



# Resource Manager



Last Refreshed:  
6/19/2024 12:41:33 PM

Period Start  
All

Resource Manager  
All

Resource  
All

OBS Type  
Resource Pool

OBS Path  
All

### Staffing by ETC

What's the percentage of ETCs vs Availability for the next few weeks?

ETC Hours / Availability

72.7%

44.0K Availability	32.0K ETC	12.0K Remaining Availability
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### Staffing by Allocation

What is the allocation percentage for the next few weeks?

Allocation / Availability

126.4%

44.0K Availability	55.6K Allocation	-11.62K Remaining Availability
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### Past Allocation Discrepancy

How many resources didn't work on their allocated project assignments?

Project Assignments With No Hours / Total Project Assignments

97.8%

3587 Project Assignments	3508 No Hours	79 With Hours
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### Timesheets

How many timesheets are compliant?

Compliant = Approved/Posted

5.0%

1824 Timesheets Total	21 Submitted	1711 Open/Missing/Returned
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### Hours

How many hours are on the timesheets?

Actuals/Availability

7%

107.7K Availability	7621.8 Actuals	100.1K Missing
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### Resources

How many resources didn't submit any timesheets?

Resources with No timesheets / Total Resources

79.2%

96 Resources Total	76 With No Timesheets	20 With Some/All Timesheets
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Dashboard

Staffing by ETC

Staffing by Allocations

Past Allocation Discrepancy

Timesheet Detail


Hours Detail


Capital Actualization

Resource Detail

Skill Matrix

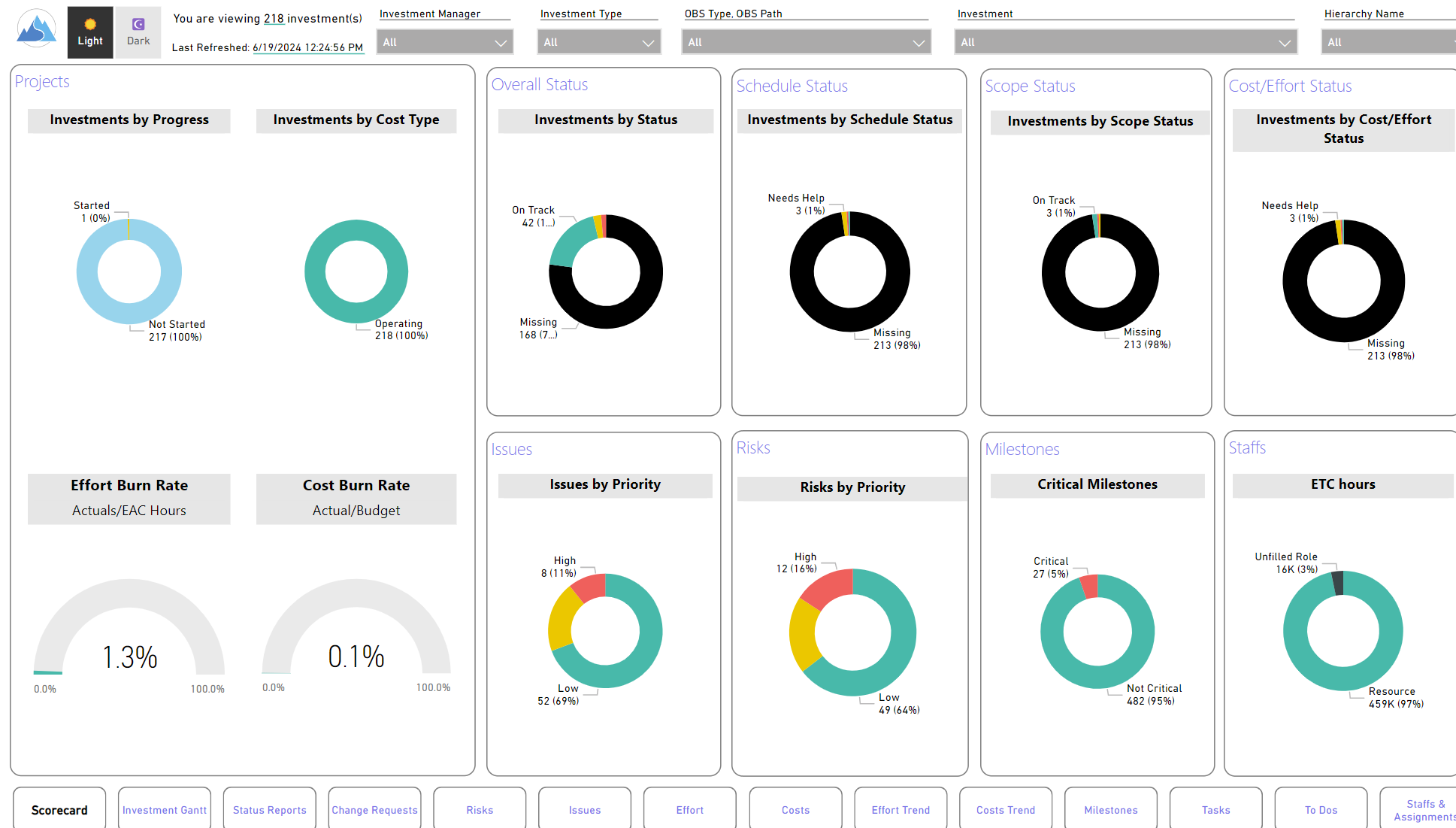
Investments & Tasks Actuals

 Light

 Dark

# Portfolio Manager

11



# Reporting Tips and Tools

Let Rego be your guide.

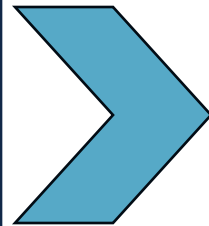


# Report Design Steps

## What To Show

How To find out?

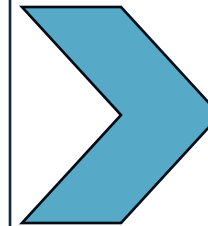
- Tailored to Your Audience
- Sample Persona-Specific Metrics



## How To Show

How to call out?

- Exceptions and Variances
- Visual Techniques
- Notify and Alerts



## How To Solve

How to help fix?

- Guidance to Resolution
- Enable Action

# What to Show



## Determine Key Insights

- Identify if overall project and resource data appear balanced
- Recognize that good aggregate data can mask individual issues
  - Over-allocated resources may offset under-allocated staff
  - Projects under budget may balance projects over budget



Not only report on what's there, but also what's not there

# What to Show



## Sample Persona-Specific Metrics

- Executive Leaders: “Developers are over by 2 FTEs in 2026”
- Resource Managers: "Team allocation at 100%, with 5 members at 70%, 2 at 175%."
- Project Managers: "Projects fully staffed, but some resources over allocated in other commitments."
- Resources: “Overall balanced, but over-allocated in Q1/Q2 and under in Q3/Q4.”



## Report Usage Considerations

- Refresh frequency
- Presentation style (self-serve, email/export etc.)

# How to Show



## Highlight Exceptions

- Instead of overall cost vs budget, specifically call out projects over budget
- Call out resources that are over allocated and in which months



## Visual Techniques

- Conditional formatting
  - Color coding
  - Highlight
  - Icon
- Drill down
- Drill Through



## Notify & Alerts

- Mobile Alerts on KPI

# How to Solve



## Integrate Helpful Context

- Tooltips for calculation formula, field descriptions or instructions to resolve



## Link Directly to Bad Data

- Hyperlinks back to Clarity Records. Now also available for:
  - Risks
  - Issues
  - Change Requests



## Facilitate Communication

- Email responsible parties with pre-filled dynamic subject and body



## Schedule & Distribute

- Subscriptions for scheduled delivery

# Accessing Your Data

## Flat File

Flat file exports from Clarity for quick ad-hoc analysis

- PROS: Easy and quick
- CONS: Data could be siloed or stale, requires manual refresh, not sustainable, security/encryption concerns

## ODATA/OFAST

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, 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.

- PROS: Easily configured/setup, easily include additional tables/fields, transactional database access for small queries
- CONS: AWS only, query timeout limits for transactional database access

## 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 need to be involved

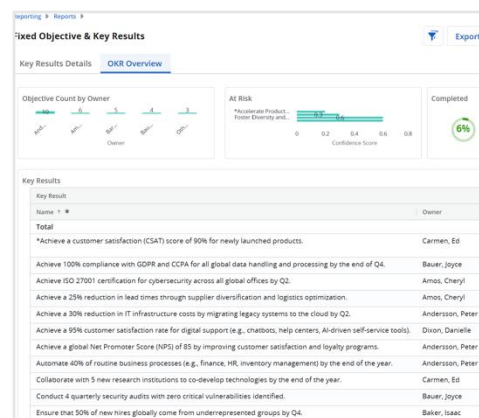
### Investments

eCommerce Portal	3
Apollo Product Launch	2
CRM Enhancements	2

### Priority

A pie chart illustrating the priority distribution of the investments. The chart is divided into three segments: a large green segment representing 'Low' priority with a value of 5, a medium yellow segment representing 'Medium' priority with a value of 4, and a small red segment representing 'High' priority with a value of 2. A legend to the right of the chart identifies the colors: green for Low, yellow for Medium, and red for High.

- ## New Reporting Workspace

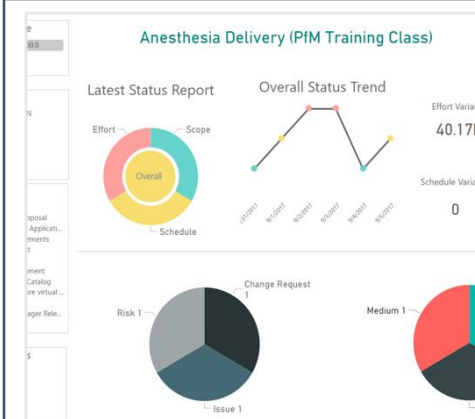


- ## Portlets



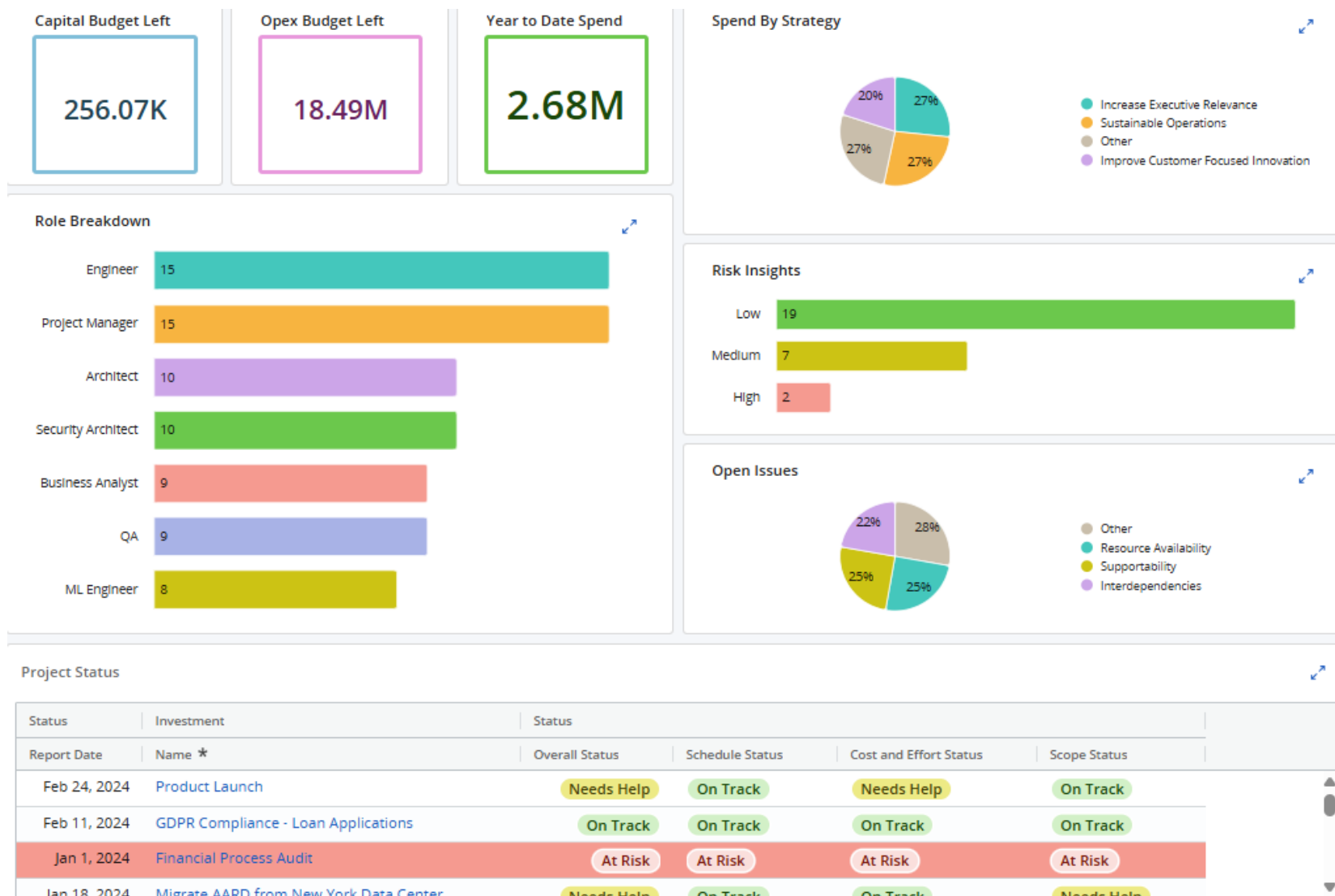
- Live Data or DWH
- Reports are operational, used day-to-day
- Can only be accessed by Clarity users
- Could be slow and impact the clarity application
- Personalization features available
- Query based portlets only available in Classic

## Integrated BI Solutions

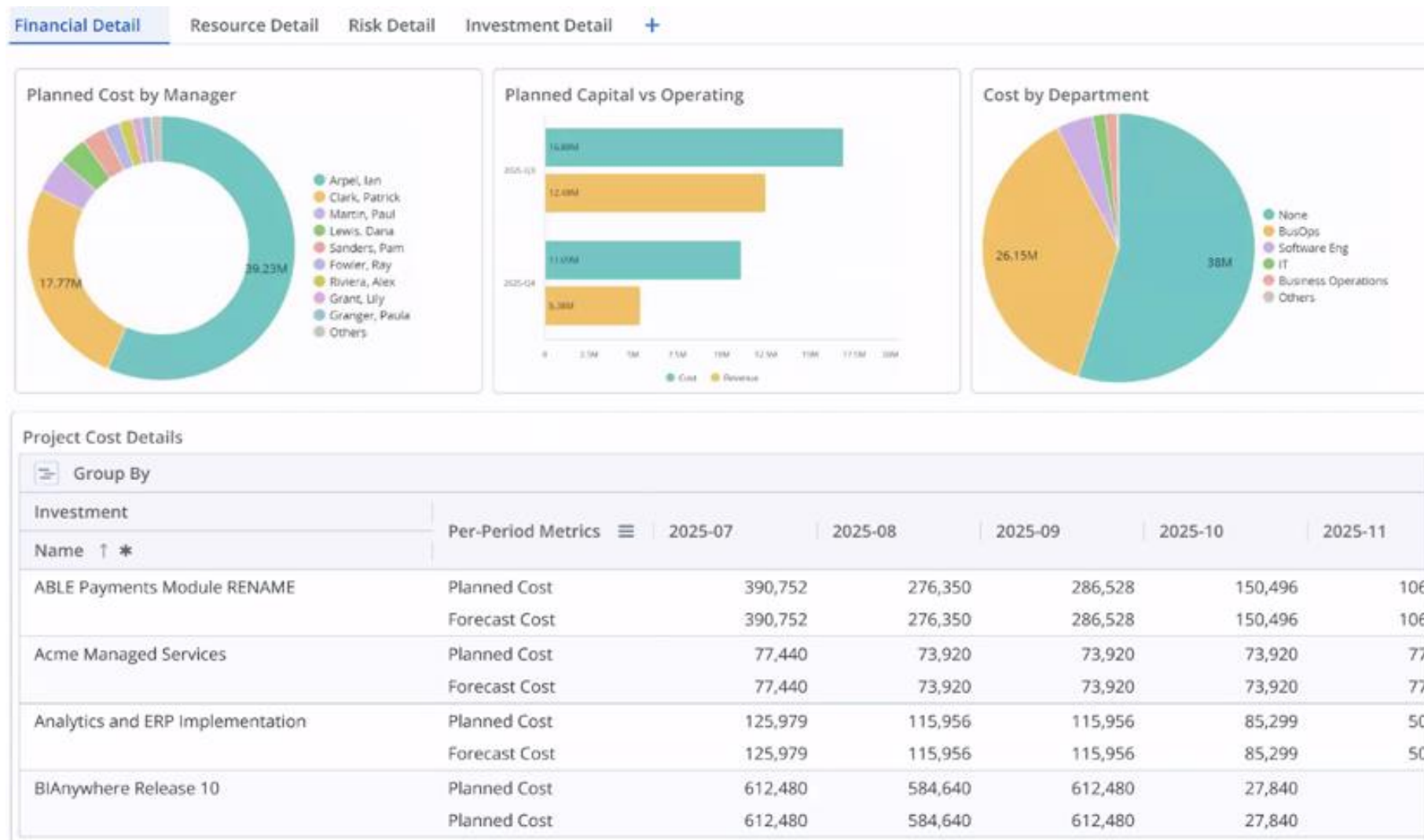


- Typically tied to multiple data sources
- OData and DB connectors are common Clarity connection options
- Industry-best visualization, interactivity, most flexibility
- Reports can be accessed by non-clarity users
- Scheduled delivery, mobile alerts
- Complex logic and calculations
- Might have a license requirement

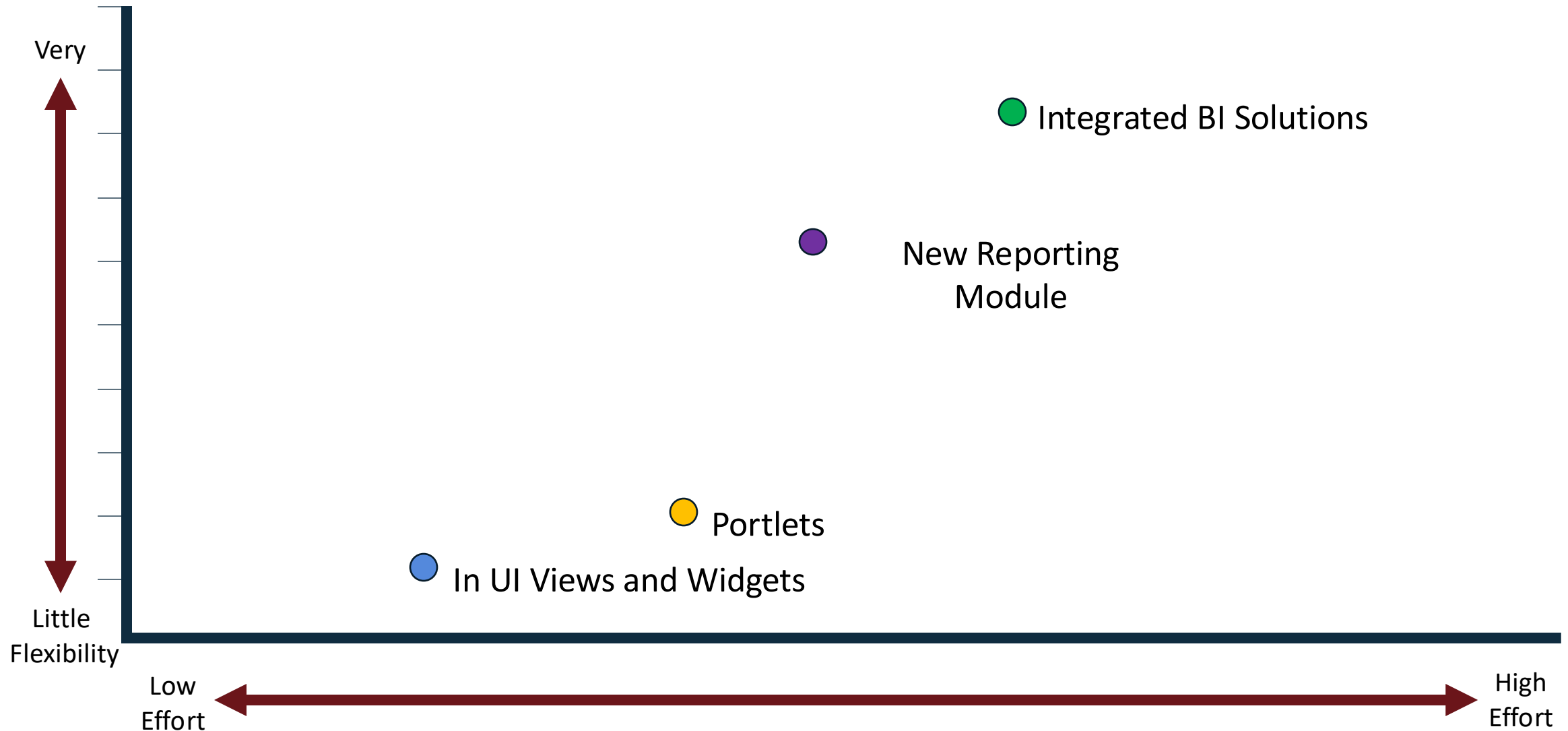
# Canvas



# Reporting Workspace



# Flexibility vs Effort



# 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)
- Next Up: Visualizations & Dashboards | Best Practice & Sharing

\* Email [Clarity@Broadcom.com](mailto:Clarity@Broadcom.com) to register

# Questions?





# Master Clarity with Rego University

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and Technical Proficiency

Let Rego be your guide.



# Elevate Your Professional Expertise with Rego University Certifications

Rego is excited to continue our **certification programs**, designed to enhance your expertise in Clarity administration, leadership, and technical skills. These certifications provide hands-on experience and knowledge to excel in your career.



## Certification Requirements:

✓ **Completion:** 12 units per certification track

✓ **Eligibility:** Open to all Rego University attendees



## Important Reminder:

To have your certification **credits tracked**, ensure you **complete the class surveys in the app** after each session. This step is critical for certification progress.

# 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](https://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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# Continue to Get Resources and Stay Connected

- 1 Use [RegoXchange.com](https://RegoXchange.com) for instructions and how-tos.
- 2 Talk with your account managers and your Rego consultants.
- 3 Connect with each other and Clarity experts at [RegoGroups.com](https://RegoGroups.com).
- 4 Sign up for webinars and join in-person Rego groups near you through at [RegoConsulting.com](https://RegoConsulting.com)
- 5 Join us for the next [Rego University](#)!

