Clarity PPM – Adopting the right Reporting Strategy

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I. Introduction

Data Analytics and Business Intelligence (BI) form an integral component in the advancement of any organization. Effectively leveraging BI will empower the organization with increased actionable data, provide great insights into industry trends, and facilitate a more strategically geared decision-making model. Since Clarity PPM touches stakeholders at various levels/units, the reports generated could help the units make important decisions. Some examples below:

1. **Resource Managers**: Provides visibility into the capacity and demand of resources across the resource pool of your organization.
2. **Finance**: Financial Reports can help track monthly/quarterly and annual budgets, identify potential problem areas before they cause any negative impacts, and improve the overall organizational business health and financial stability.
3. **Executive Leadership**: Portfolio Reports allows members of Executive Leadership to measure the organization's pulse more easily by removing gray areas and eliminating the need to play the guessing game on how the company is doing.
4. **Project Managers**: Provides visibility into the key performance indicators of status, schedule, alignment, and risk across projects in an organization.

II. How to choose the Right Reporting Strategy

To choose the right reporting strategy, it is important to understand the need and the format of data required which involves finding answers to questions like:

1. Target Audience:
    a. Who are the intended audience of the report?
    b. What are the direct and in-direct third-party systems that consume this report?
2. Purpose:
    a. What are the key objectives or business problems that a report is required to address?
    b. Are there any reports already available in Clarity that could partially/wholly address the requirements?
3. Business Impact:
    a. What is the business impact of not having this report?
    b. What impact does it cause if this report fails execution or is not available at the time?
4. Frequency:
    a. What is the frequency of report generation and mode of distribution?
5. Constraints:
    a. Are there any security/infrastructure/technical constraints that are required to be accounted for?
6. Reporting Tools:
    a. Current State: What is the current mode of reporting?
    b. Future State: Which tool is best suited to replace the current mode of reporting to optimize the training requirements?

7. Other factors for consideration could be
    a. Data volume
    b. number of pages, sections, sub-reports that can influence performance
    c. real time data vs near-real time data
    d. report output format
    e. cost-effectiveness,
    f. quality,
    g. resources available,
    h. ease of use,
    i. efficiency/performance of the reporting engine etc.

Reports that are carefully developed weighing in on all the factors above could sometimes even address hidden needs of customers/provide additional information in an optimized manner thereby promoting user adoption and higher satisfaction levels.

1. Providing data summary can often help with quick assessments while making important decisions. For e.g., Summary or costs/benefits rolled up at Portfolio level helps with developing the investment strategy.

2. Exception Reports are a great way easily highlight any concerns/predict risks that require action. It would be an added advantage to have report list some suggestions. For e.g., The executive leadership is often interested in keeping track of the projects that are behind schedule and what are mitigation controls that are in place.

The future of BI however lies is being able to predict problems before they happen and fix the issues as required without human intervention which can be achieved by Artificial Intelligence and Machine Learning that are fast developing.

III. Reporting Options in Clarity PPM

Clarity PPM provides a rich collection of OOTB reports/portlets/dashboards that are optimized in terms of performance and provide specific data. Therefore, it should be reused as much as possible for our reporting needs.

Clarity supports the following OOTB and external reporting tools to build custom reports

OOTB Reporting Tools

Portlets

In-house reporting platform provided by Clarity. Portlets provide snapshots of data and can appear as grids, as charts, or as any HTML content on a page. Typically suggested when:

1. Report requirements are simple with minimal drilldown capabilities.
2. The reports are targeted for users logging in to Clarity on a regular basis as the data resides within Clarity and the users require privileges to be able to access.
3. Data provider to the report is within the acceptable performance limits.
4. For viewing within Clarity PPM and output /delivery format are of least importance. Though the portlets can be exported to Excel or Power point, there may be constraints in exporting the data
5. Personalization features are required.
6. With recent improvements, could use either live database or data warehouse as data source to optimize performance.

Jaspersoft Ad-Hoc Views and Dashboards

Advanced Reporting feature within Clarity PPM allows creation of ad hoc views that could be further used to create dashboard of related views, save and export/email views as reports in multiple formats.

1. Dashboards provide summary information for easy viewing and rich drilldown capabilities.
2. Highly recommended to use when the customizations are minimum and 'on the fly' reporting.
3. Minimal/no coding skills required as the developing reports mostly involves drag and drop.
4. Supports PDF export in addition to other formats. However, not suited for exporting very large volumes of data.

Jaspersoft Studio Reports

Clarity PPM supports Jaspersoft Studio Professional to connect to Advanced Reporting to create, download, upload, and publish reports with a report developer user and a server connection to connect to Advanced Reporting.

1. Data resides in Clarity.

2. Exporting capabilities in various formats (pdf, .xlsx, .pptx, etc) including editable formats like .docx.
3. Advanced formatting and styling options available, including using customer's branding and theme for the report ourput
4. Multiple reports can be combined into one with sub report functionalities.
5. Reports support complex business logic, combined charts or large number of calculations, etc.,
6. Automatic report distribution with scheduling capabilities.
7. Embed formatted report (such as Project Status Report within the project blueprint) for easier accessibility and usability within specific modules in Clarity PPM

External BI Tools

Often organizations use other BI tools, and it is important that Clarity PPM fits into their reporting tool.

The most used BI tools with Clarity PPM are:

1. Microsoft Power BI
2. Tableau
3. Qlikview

Data Connectivity Options

There are various options available to establish data connectivity between External BI Tools and Clarity PPM (Both SaaS and On-Prem).

Clarity PPM On-Prem

On-Prem Implementations can take advantage of establishing direct connectivity with the built-in Datawarehouse or develop DB views that can be consumed by the BI tool.

Clarity PPM SaaS

Some options available for SaaS are:

1. Flat File extracts/API Based Extracts
2. OData Connection with Datawarehouse (Optimized for use with Power BI but can be used with Tableau and Qlikview as well.) – Possible to implement row level security.

The External BI tools offer:

1. Better Visuals best suited for attractive and complex layouts that consist of many graphs.
2. Better Performance with complex drilldowns.
3. Some tools like Power BI offers interactive reports with on-screen/cross filtering capabilities.
4. Export capabilities are limited.
5. Reports could be built mostly with drag and drop.
6. Tools like Power BI are Cost Effective it is often packaged with Microsoft Office.
7. Advanced Mobile capabilities.

IV.   Conclusion

Organizations often use combination of tools based on the reporting needs. Data is also often sourced from a combination of tools like Clarity PPM, Jira, ServiceNow etc. Whichever tool is used, it is important that

1. The report provides comprehensive data without having the user to develop on it further.
2. The report maintains its integrity without loading the customer with too much data.
3. There are no multiple versions of the report presenting the same data with different formats.