



 Drive Results.

Leveraging Rational Insight / RRDl to develop custom reports

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IBM

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Rational User Conference



Introduction

- Why do you want to develop your own reports, widgets and dashboards?

What your colleagues say

- We have our own standard reports that we have used and want to continue to use.
- We have specific project metrics that need to be tracked.
- Our way of working is very specific and the IBM ootb reports do not match.
- We prefer tables instead of charts; line charts instead of bar charts.
- We are required to deliver the report in a set format.
- We want to have extra parameters when filtering data returned by the report.



Topics

- Introduction to Rational Insight and Reporting for Development Intelligence (RRDI)
- Overview of the CLM Data Dictionary
- Demonstration of Report Studio
- 'Need to know' when using Rational Insight / RRDI
- Conclusion/Summary



Rational Insight

Development Intelligence for Measured Improvement

IBM Rational Insight provides a comprehensive performance **measurement** solution tailored for Software and Systems Development

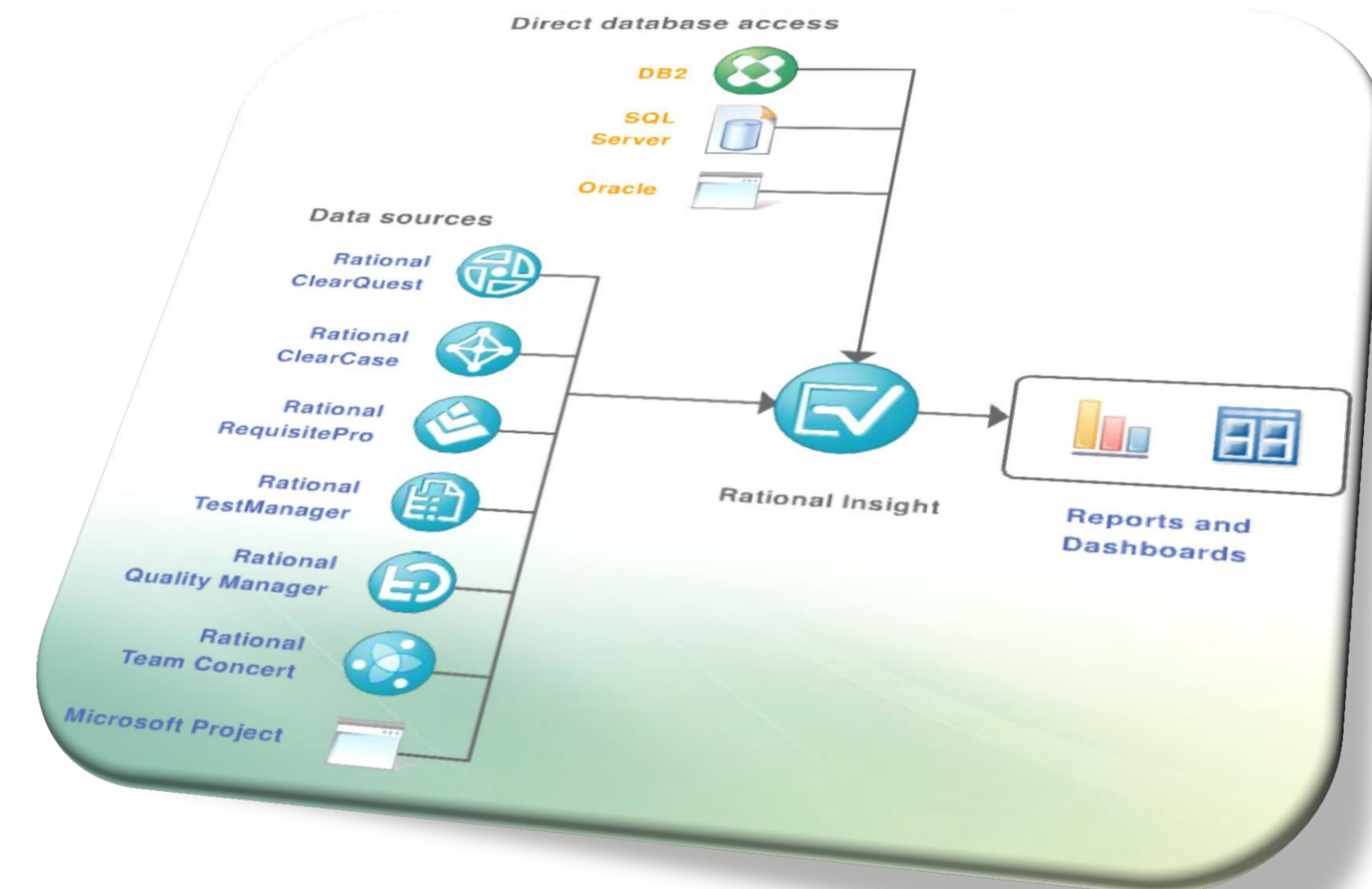
- ▶ Includes Cognos 10 BI Reporting In-The-Box
- ▶ Pre-built customizable data model, ETL, reports, and dashboards

Leverage Rational Insight to **analyze** trends and quickly locate root causes, prescribe course corrections, and predict future outcomes

- OOTB scorecard framework for weighted KPI indicators and alerts
- Integrates with additional Cognos analytic applications

Utilize Rational Insight to measure current process efficiency and process **improvement** effectiveness

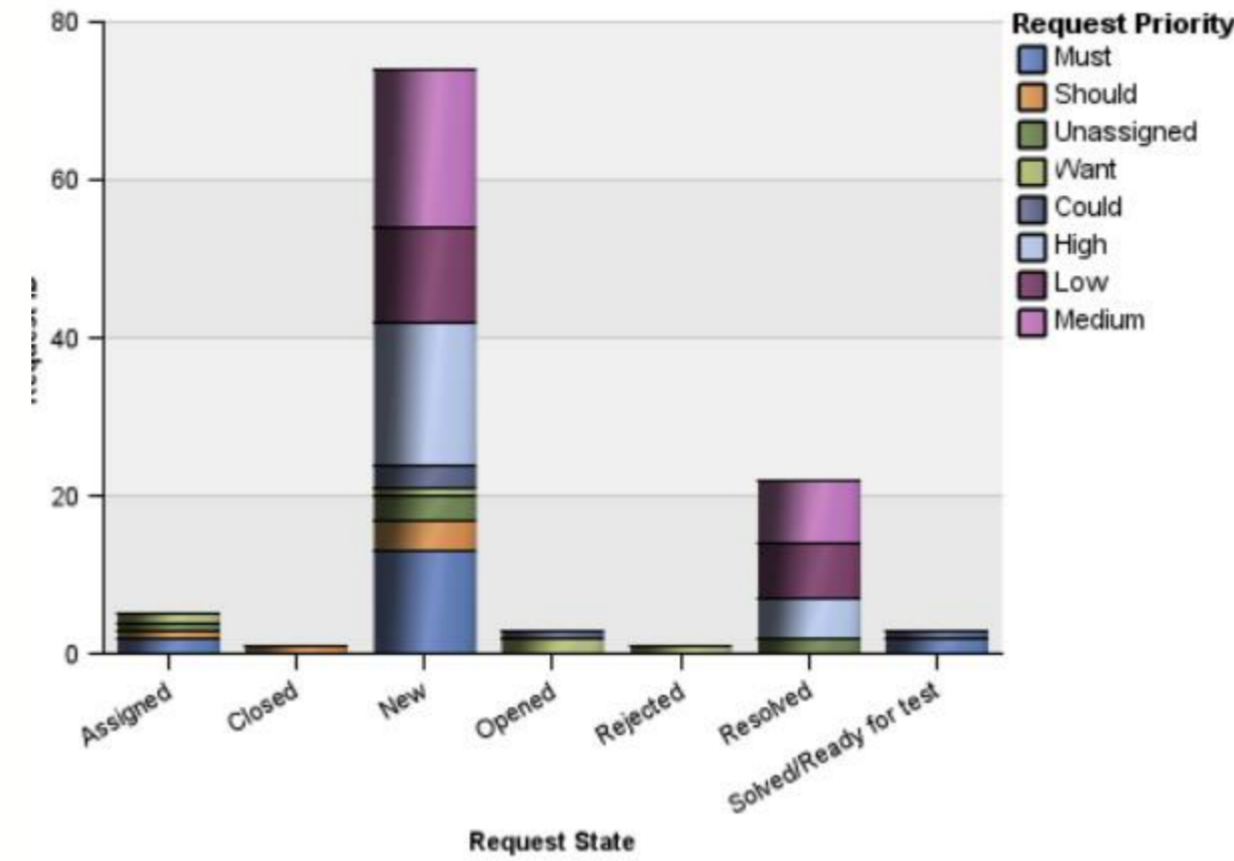
- ▶ OOTB reports and dashboards based on many Rational Method Composer best practices
- ▶ OOTB reports and dashboards grouped by CMMI process area and level



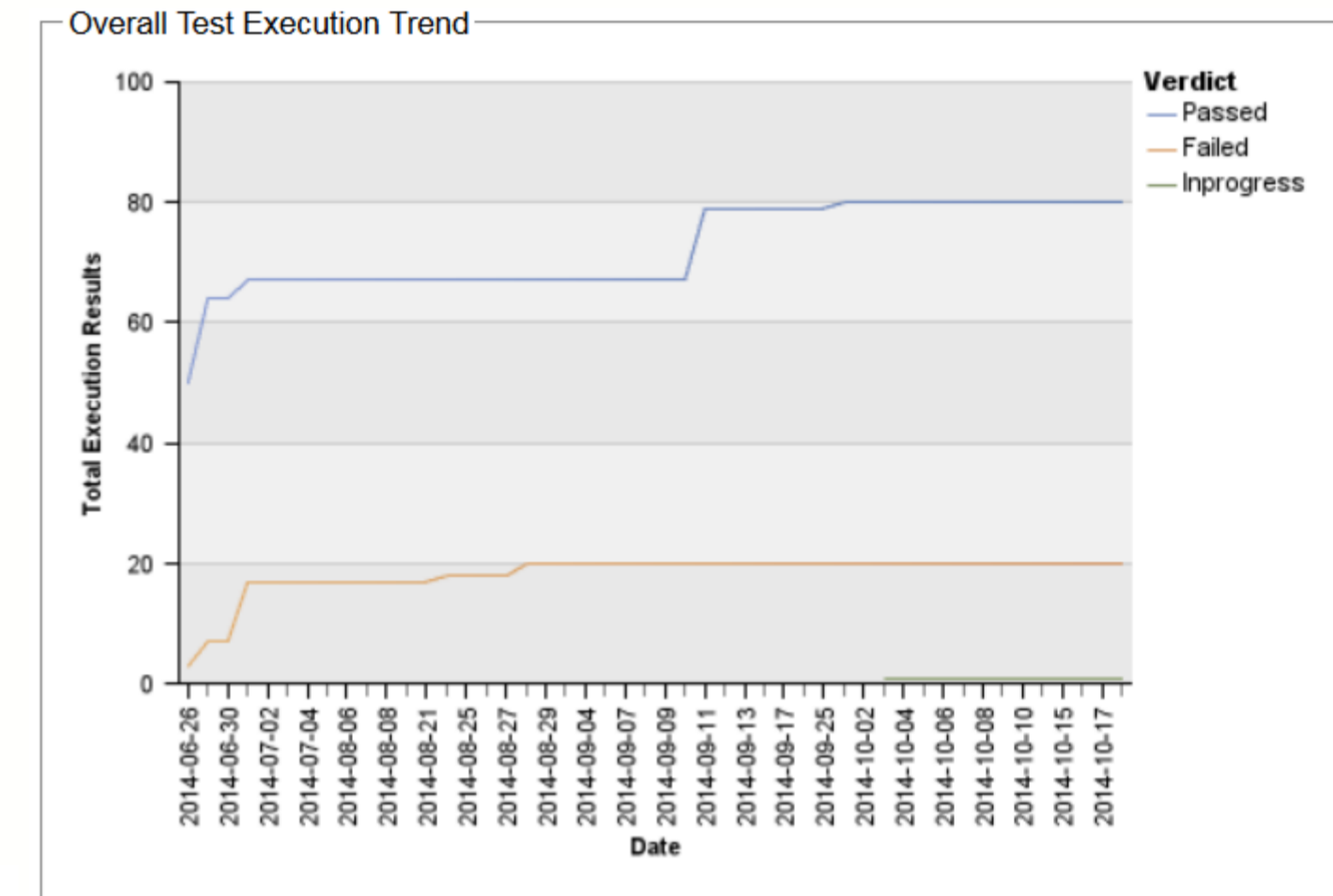


And building your reports using CLM data

Test Status Name	Test Case ID	Name	Owner Name
draft	289	Donors will receive confirmation and receipt	Tanuj
	290	Organizations can Apply	Tanuj
	291	Donor dividend allocation conforms to stated criteria	Tanuj
	292	JKE Charity Coordinator responds to online request	Tanuj
	293	Dividend Allocation by Percentage	Tanuj
	294	Allocate Dividends to a Single Cause	Tanuj
	295	Check Account Balance	Tanuj
	296	Close Account	Tanuj
	297	Dispute Credit Card Charge	Tanuj
	298	Pay Bills Online	Tanuj
	299	Request Credit Increase	Tanuj
	300	(QM Tutorial) Allocate Dividends to Multiple Causes	Tanuj
	301	Consistent display of currency	Tanuj
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32		Overall - Count Distinct	

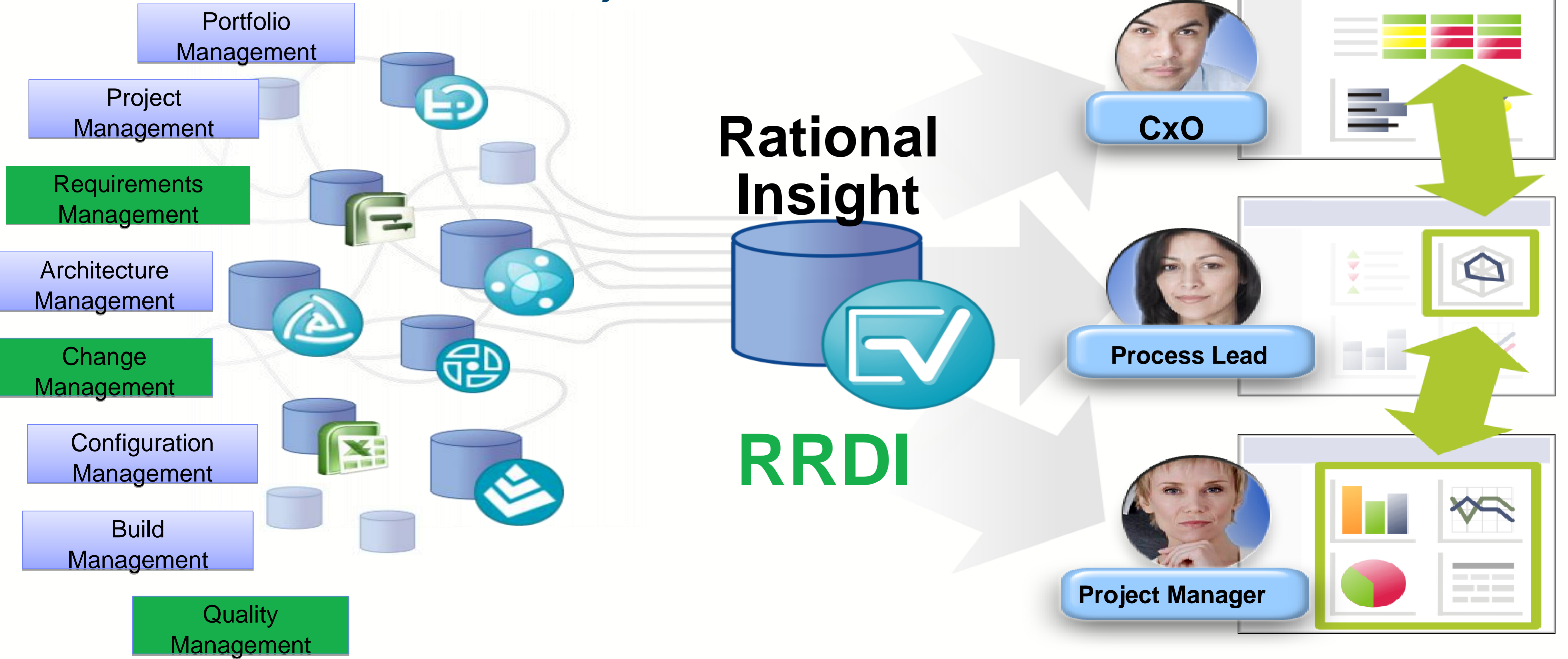


Requirement ID	Name	Test Case ID	Name
220	Support dividend processing via mobile devices	304	Mobile donor can contribute
227	Requests sent in form of hard copy mail	279	Process hard copy requests
237	Donors will receive confirmation and receipt	289	Donors will receive confirmation and receipt
239	Customers can nominate an organization for the program	285	Customers can Nominate an Organization
240	Donors Deposit Money in a Pooled Assistance Fund		
245	Mobile app must be cross platform	303	Donor can modify mobile settings
253	JKE Charity Coordinator will respond to request in the website triggering..	292	JKE Charity Coordinator responds to online request
289	Validate Loan term and amount	302	Test Validate Loan Term and Amount
297	Donor Dividend Allocation Criteria	291	Donor dividend allocation conforms to stated criteria
302	Organizations may apply with an initial request	283	Organizations may apply with an initial request
305	Frequency of dividend transfer	276	Verify dividend transfer frequency
307	Requests sent in form of email	280	Process email requests
309	Organization must identify how much money is desired	281	Organization must identify how much money is desired
310	Organizations can apply	290	Organizations can Apply
311	Organization must provide justification for why funds are needed	287	Organization must provide justification for why funds are needed
316	Dividend allocation by percentage	293	Dividend Allocation by Percentage
316	Dividend allocation by percentage	294	Allocate Dividends to a Single Cause
321	Dividend processing payment is a one time transaction.		





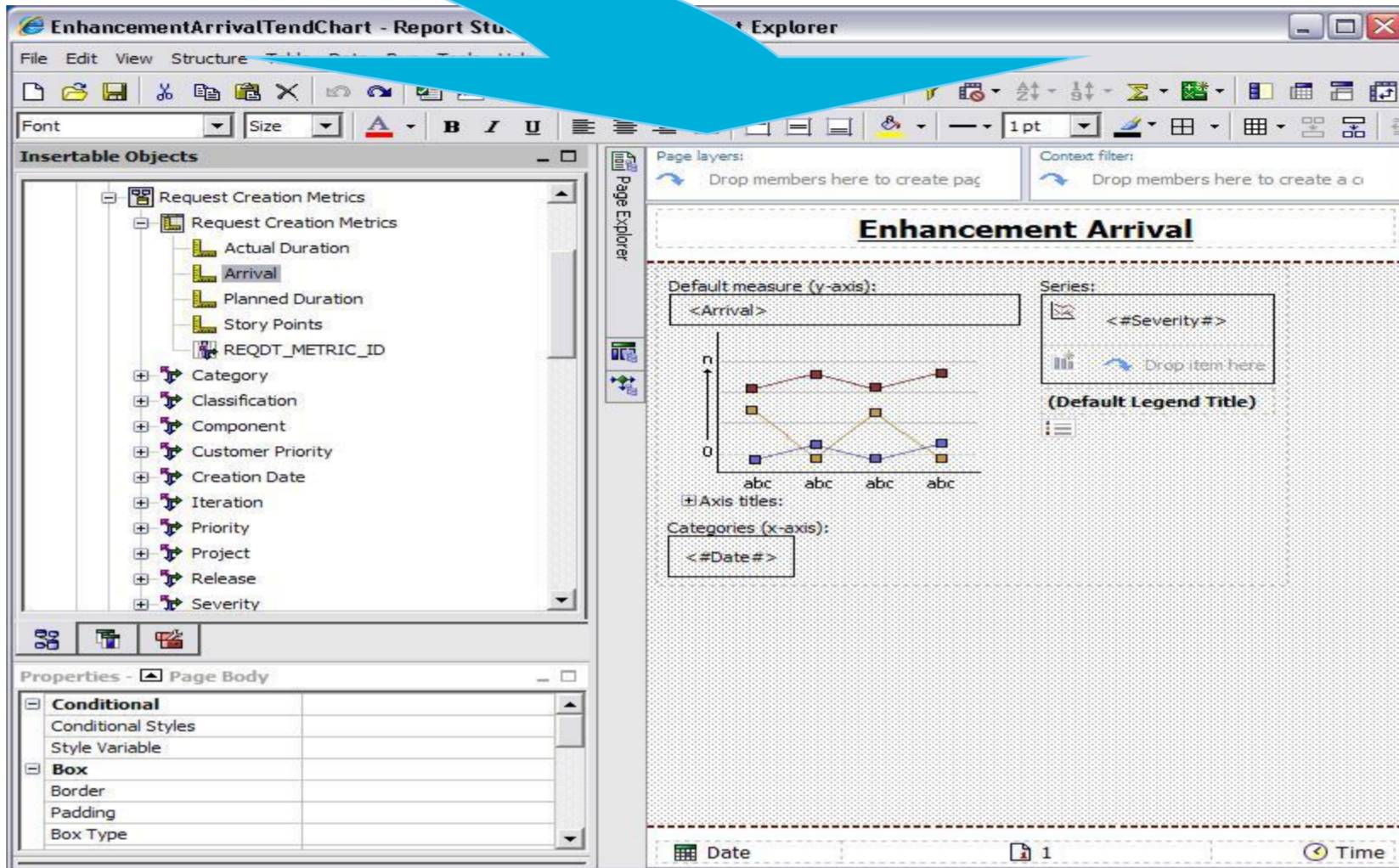
Collaborate and Report across disparate development artifacts in the context of business objectives



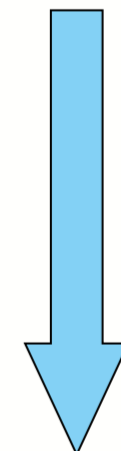


Create and Customize Reports (RRDI and Insight)...

- Reporting Data Model (DW)
- Change Management
- Configuration Management
- Project Management
 - Project Performance Metrics
- Quality Management
 - Execution Result Date Metric
 - Execution Result Metrics
 - Execution Result Metrics with Iteration
 - Execution Result Points Metric
 - Execution Result Points Metric with Iteration
 - Execution Work Item Metric
 - Execution Work Item Metric with Iteration
 - Execution Work Item Metric with Iteration and Request
- Requirement Management
 - Child Requirement Metrics
 - Requirement Metrics
 - Requirement Metrics with Iteration
 - Requirement Metrics with Iteration and Request
 - Requirement Traceability
- Operational Data Store



Query Studio lets users with little or no training quickly design, create and save reports to meet reporting needs not covered by the standard, professional reports created in Report Studio.



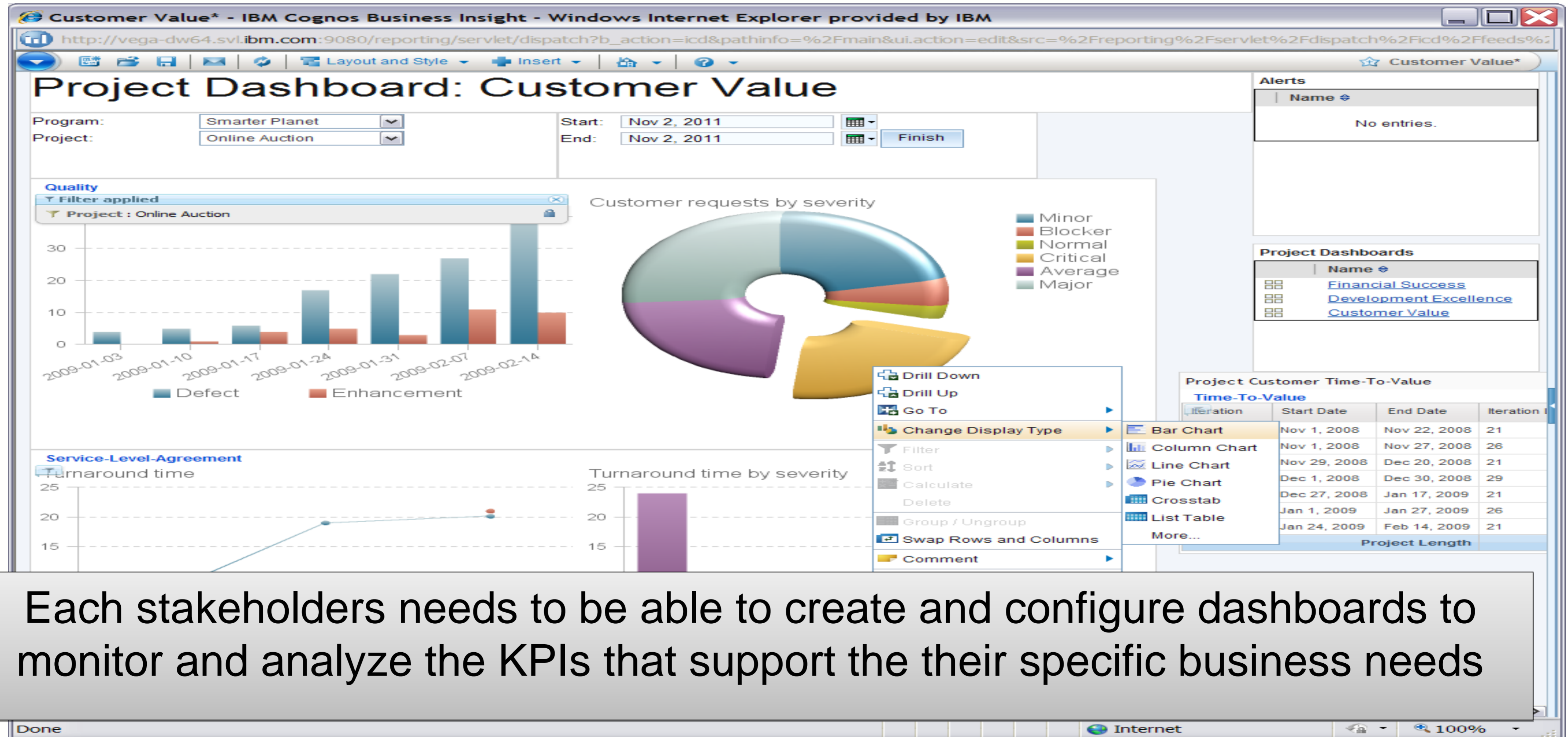
The screenshot shows a report titled "All Defects" in Query Studio. The report displays a table with the following columns: Severity, ID, Headline, Priority, and State. The data is sorted by ID in ascending order.

Severity	ID	Headline	Priority	State
1-Critical	SAMPL00000002	sales tax incorrect if item deleted from purchase	2-Give High Attention	Resolved
	SAMPL00000018	add item button not active after adding 3 other items	1-Resolve Immediately	Resolved
	SAMPL00000019	sales tax incorrect for NH		Submitted
	SAMPL00000021	inventory report is not running correctly		Submitted
	SAMPL00000022	delete item button deletes two items	2-Give High Attention	Resolved
	SAMPL00000006	delete item not working correctly	2-Give High Attention	Open
	SAMPL00000007	override price does not work	2-Give High Attention	Resolved
	SAMPL00000009	inventory re-order not done on large sale	2-Give High Attention	Resolved
	SAMPL00000024	overriding price operation allows negative number		Submitted
	SAMPL00000028	context sensitive help fails from reorder window		Submitted
	SAMPL00000032	shortcut to logout does not work		Submitted
	SAMPL00000033	unable to add item already in sale list		Submitted
	SAMPL00000001	spelling error in login screen	3-Normal Queue	Open
	SAMPL00000003	cancel sale doesn't correctly repaint screen	3-Normal Queue	Resolved
	SAMPL00000005	columns out of alignment	2-Give High Attention	Resolved
	SAMPL00000008	alt-C does not invoke cancel operation	3-Normal Queue	Resolved
	SAMPL00000011	change due amount is supposed to be red		Submitted
	SAMPL00000015	end-of-shift report fails if after midnight	3-Normal Queue	Resolved
	SAMPL00000017	delete operation leaves blank line in form	3-Normal Queue	Resolved
	SAMPL00000020	credit card refused message is unclear	3-Normal Queue	Resolved

Report Studio lets report authors create, edit, and distribute a wide range of professional reports. They can also define corporate-standard report templates for use in Query Studio, and edit and modify reports created in Query Studio.



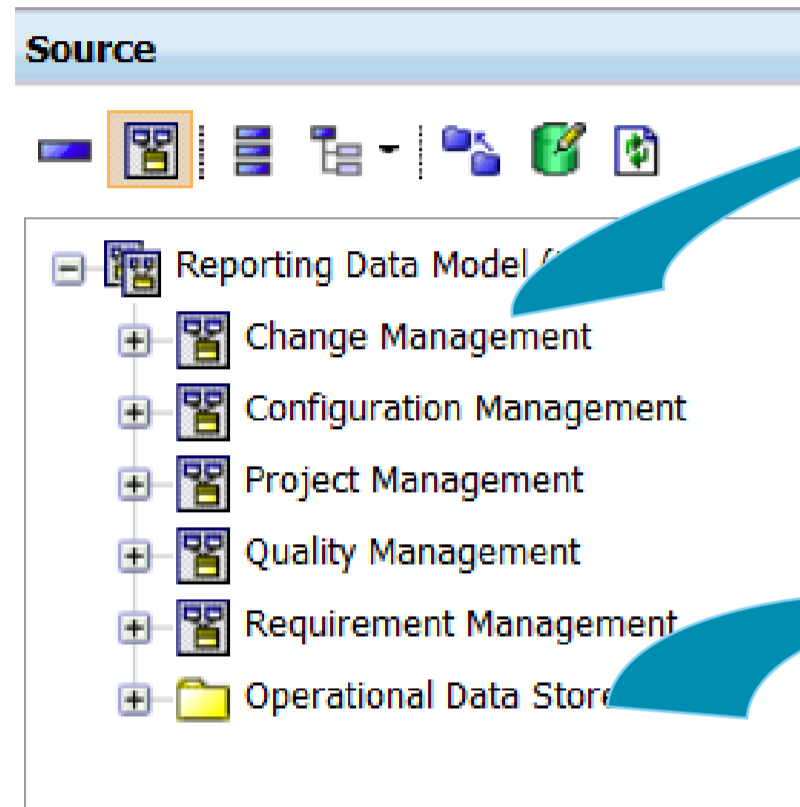
Create and Customize Personal Dashboards



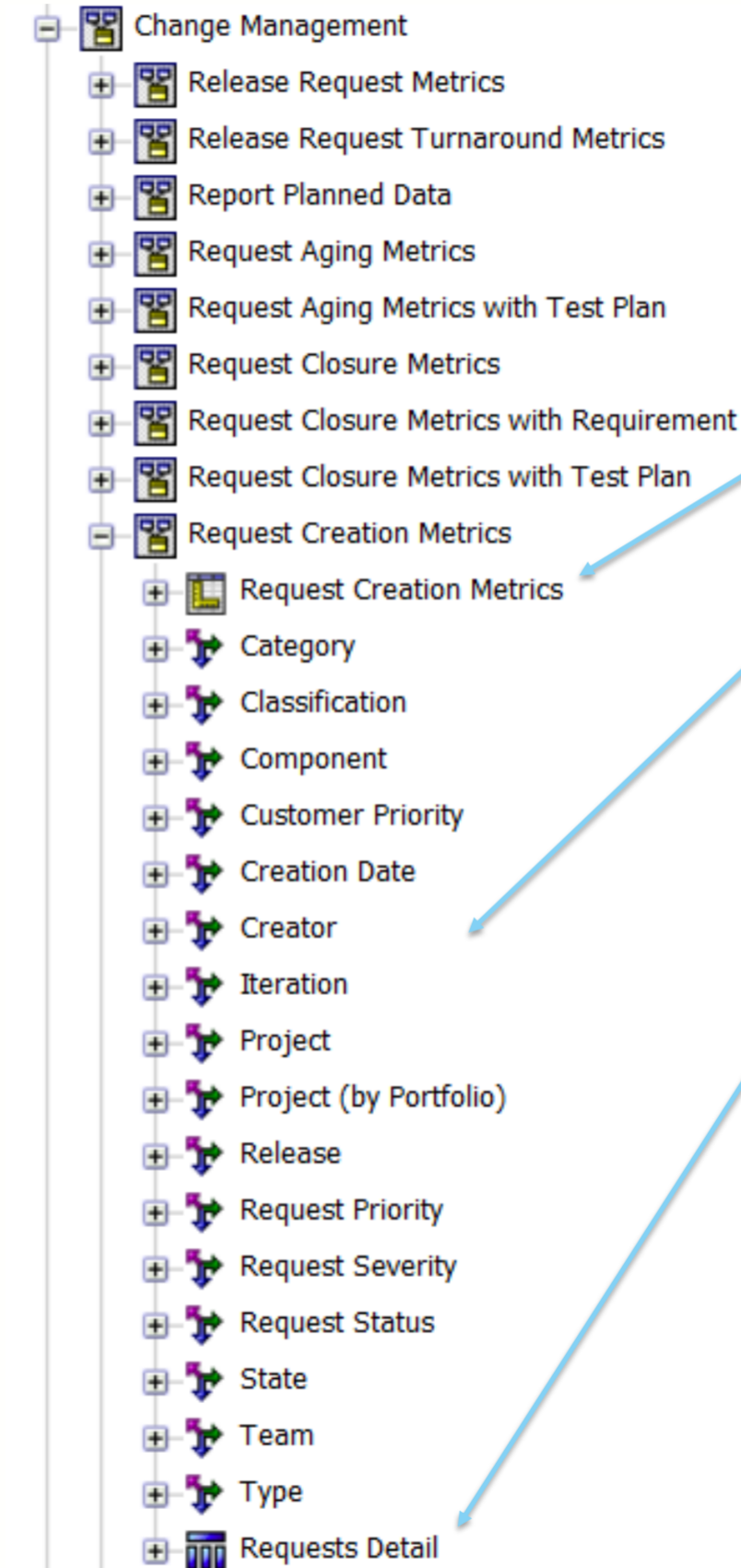
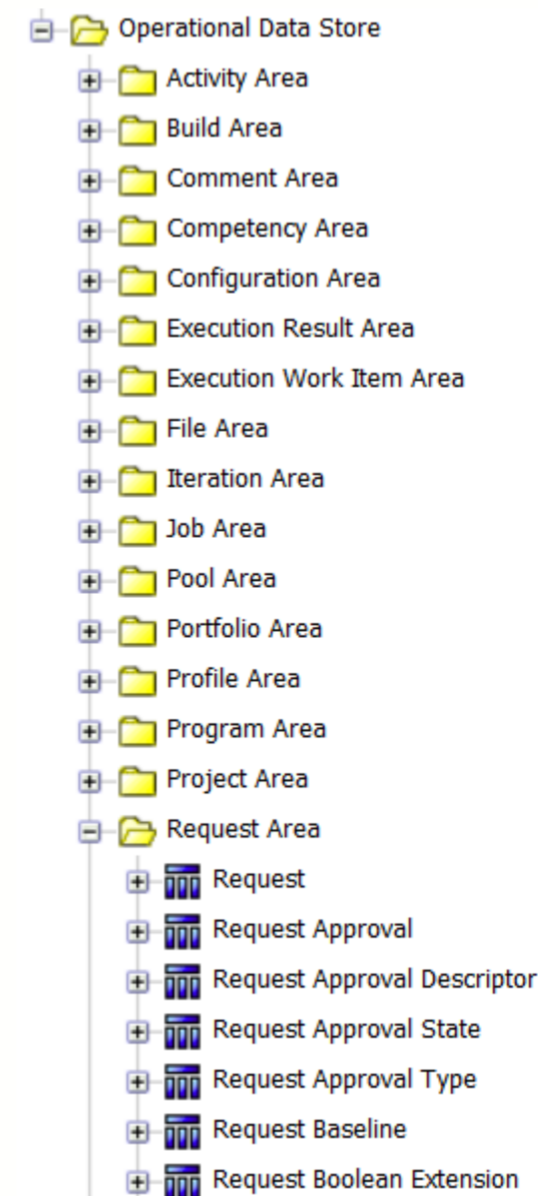
Each stakeholders needs to be able to create and configure dashboards to monitor and analyze the KPIs that support the their specific business needs



CLM Data Dictionary



Raw Data and Related Data



Metrics
Measurement
Dimension
Data

I want to see

- Test case details
- Defect details
- Traceability from Requirements to Implementation and Test

I want to visualise

- Test Execution Trend
- Request Closure Trend



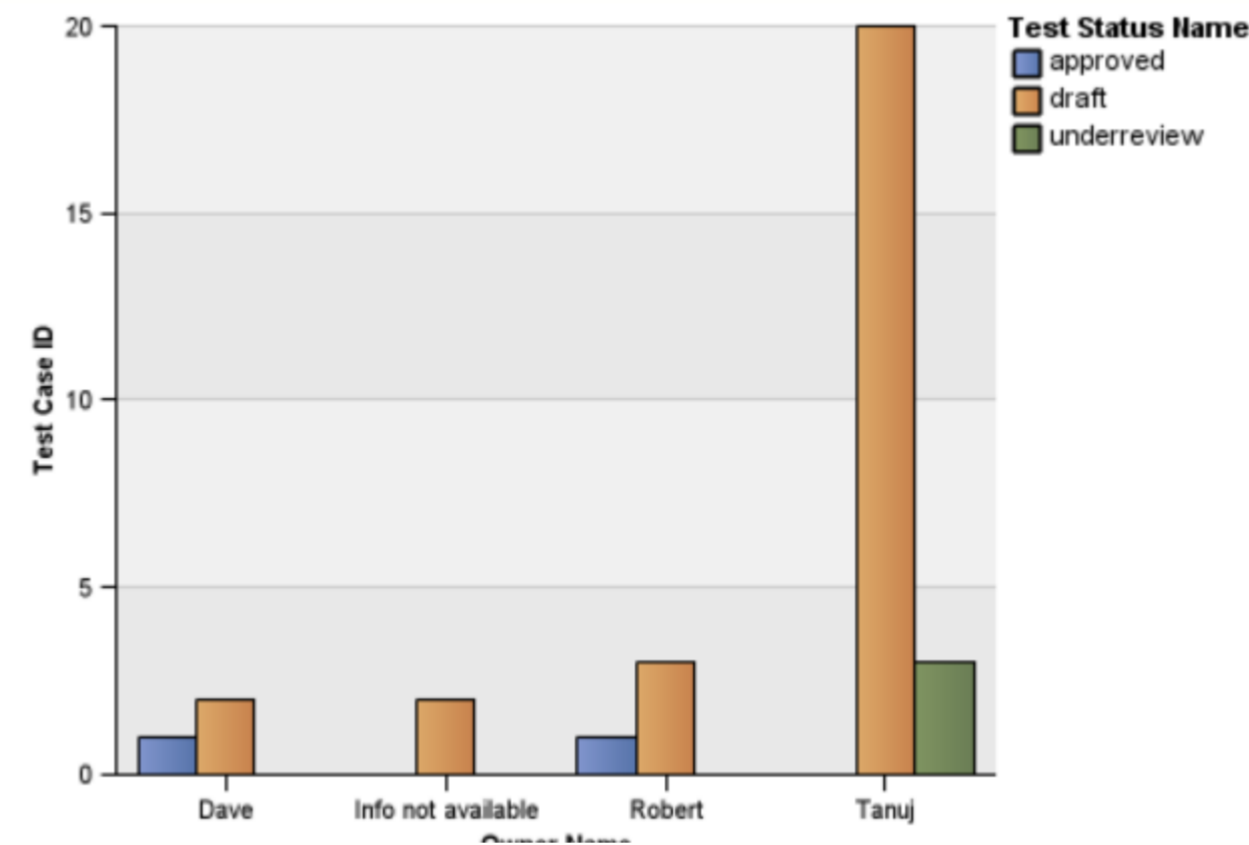
Demonstration of Report Studio

- Goal is to introduce you to the Report Studio GUI and CLM Data Model
- Operation Data Store (ODS) Reports
 - Demo 1 - Create a Test Case Report (List and Chart)
 - Demo 2 - Create a Defect Report (Chart)
- Metrics Report
 - Demo 3 - Create a Test Execution Results trend by Creation Date for Verdict and Test Plan
- Import report into CLM Application



Demo 1 – Test Case by Status List and Test Case by Owner and State

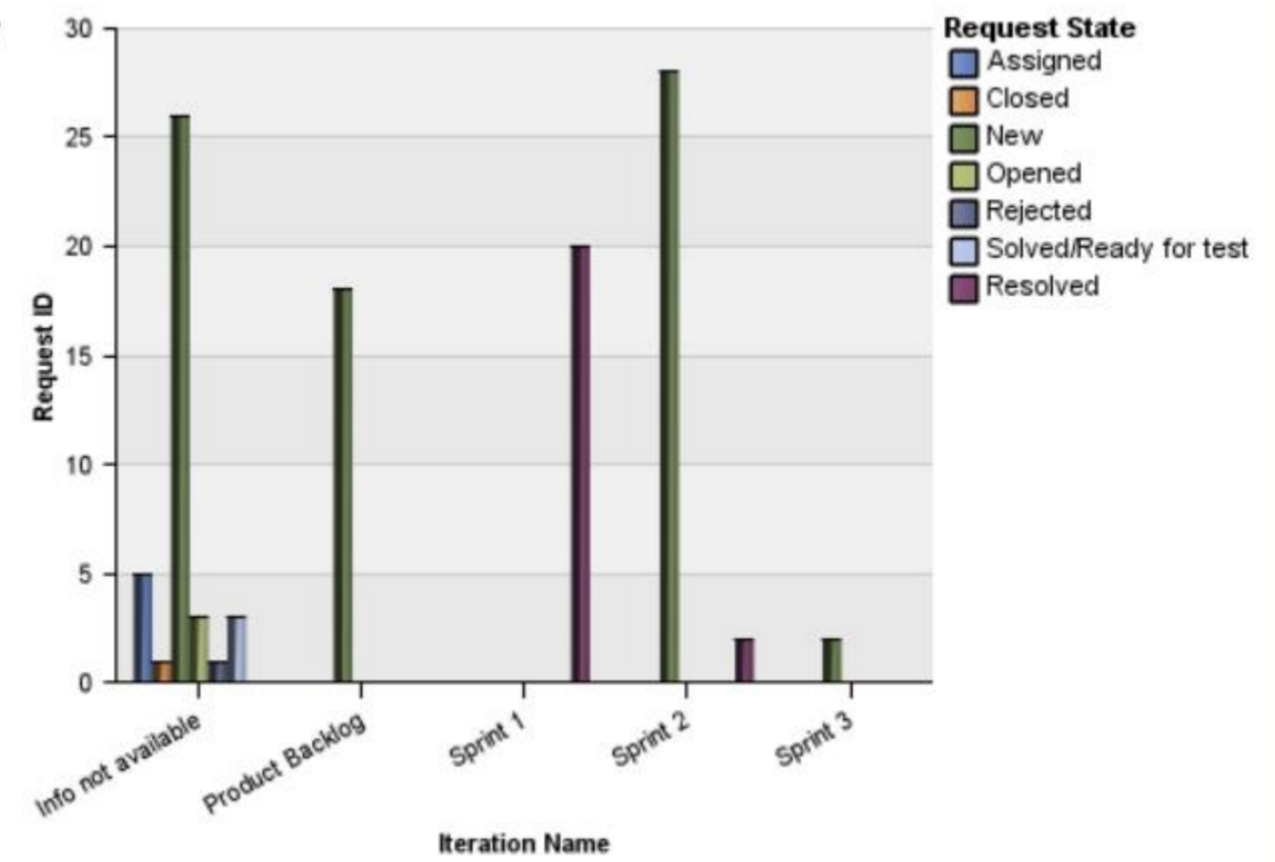
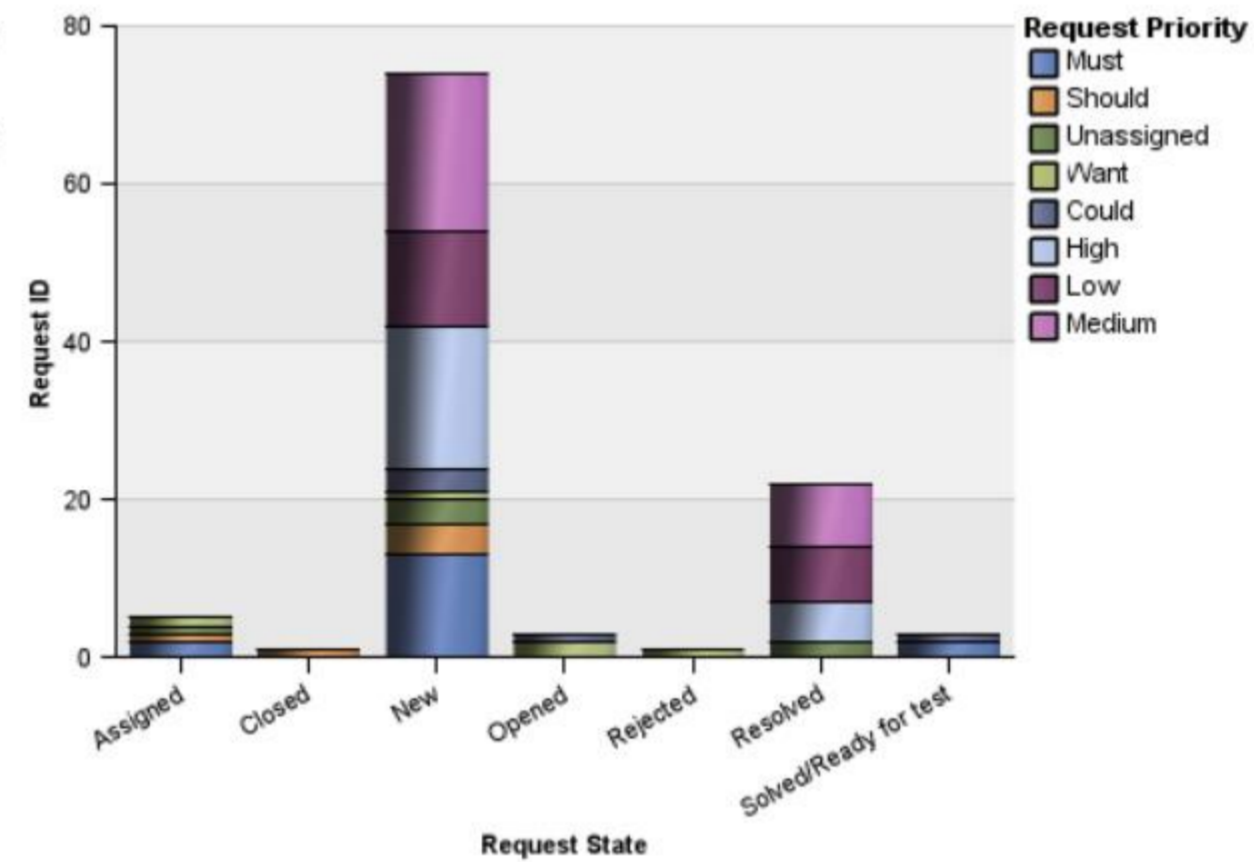
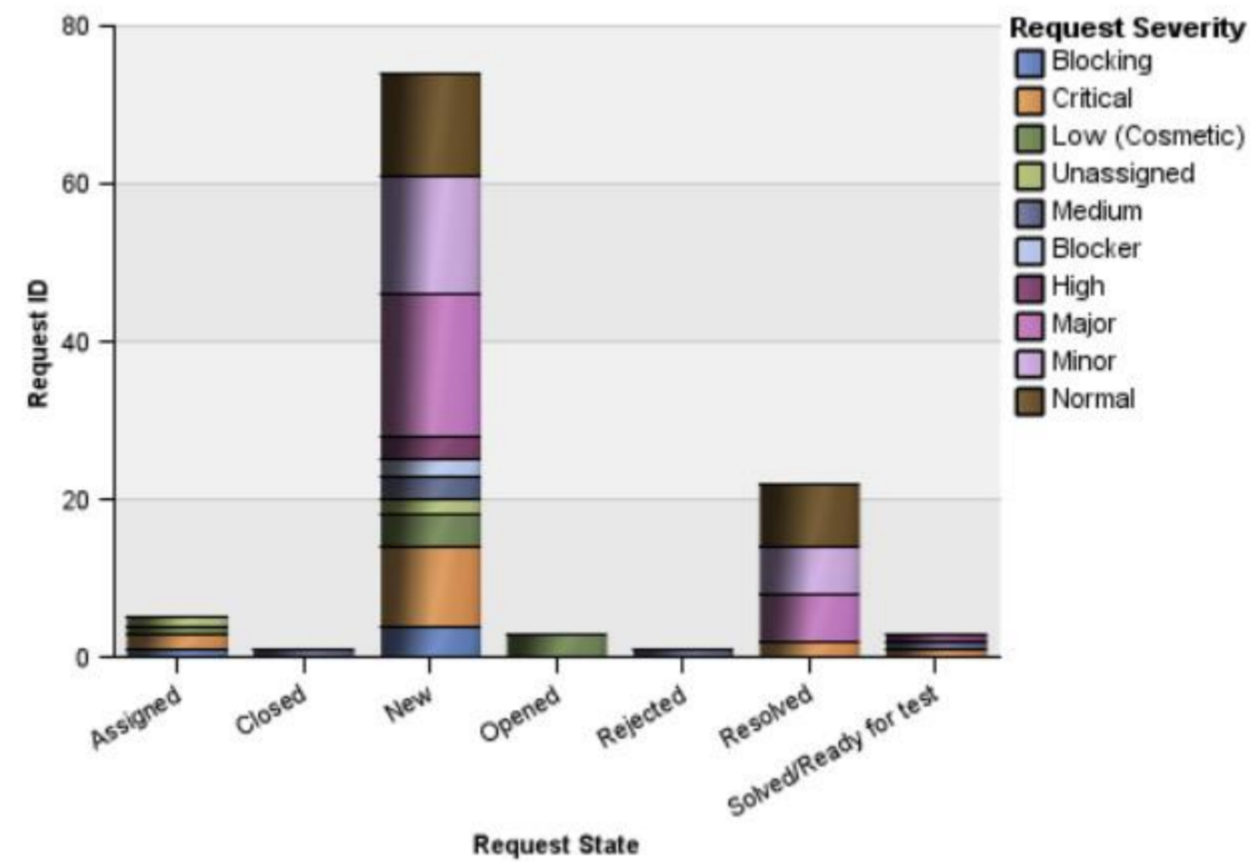
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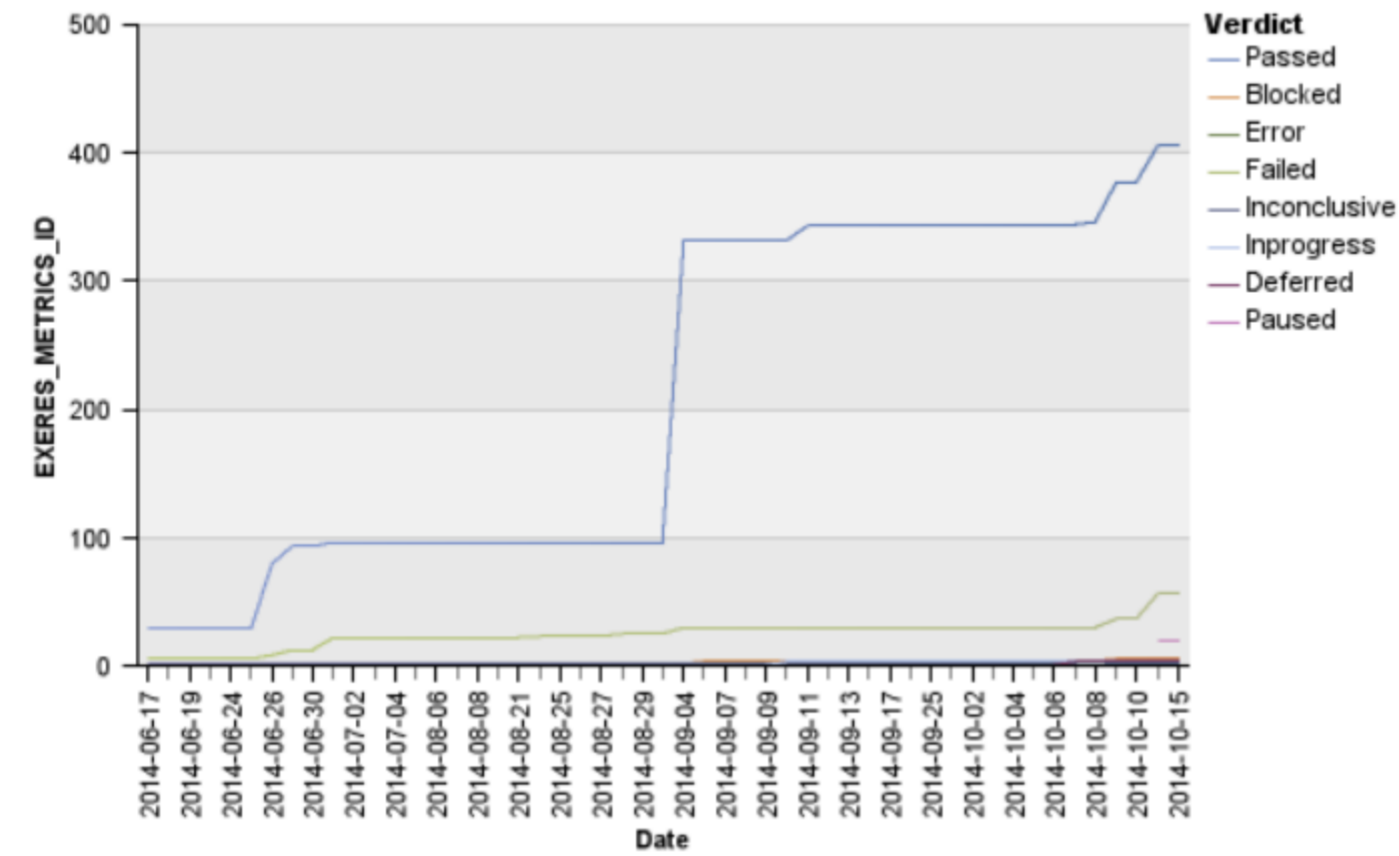
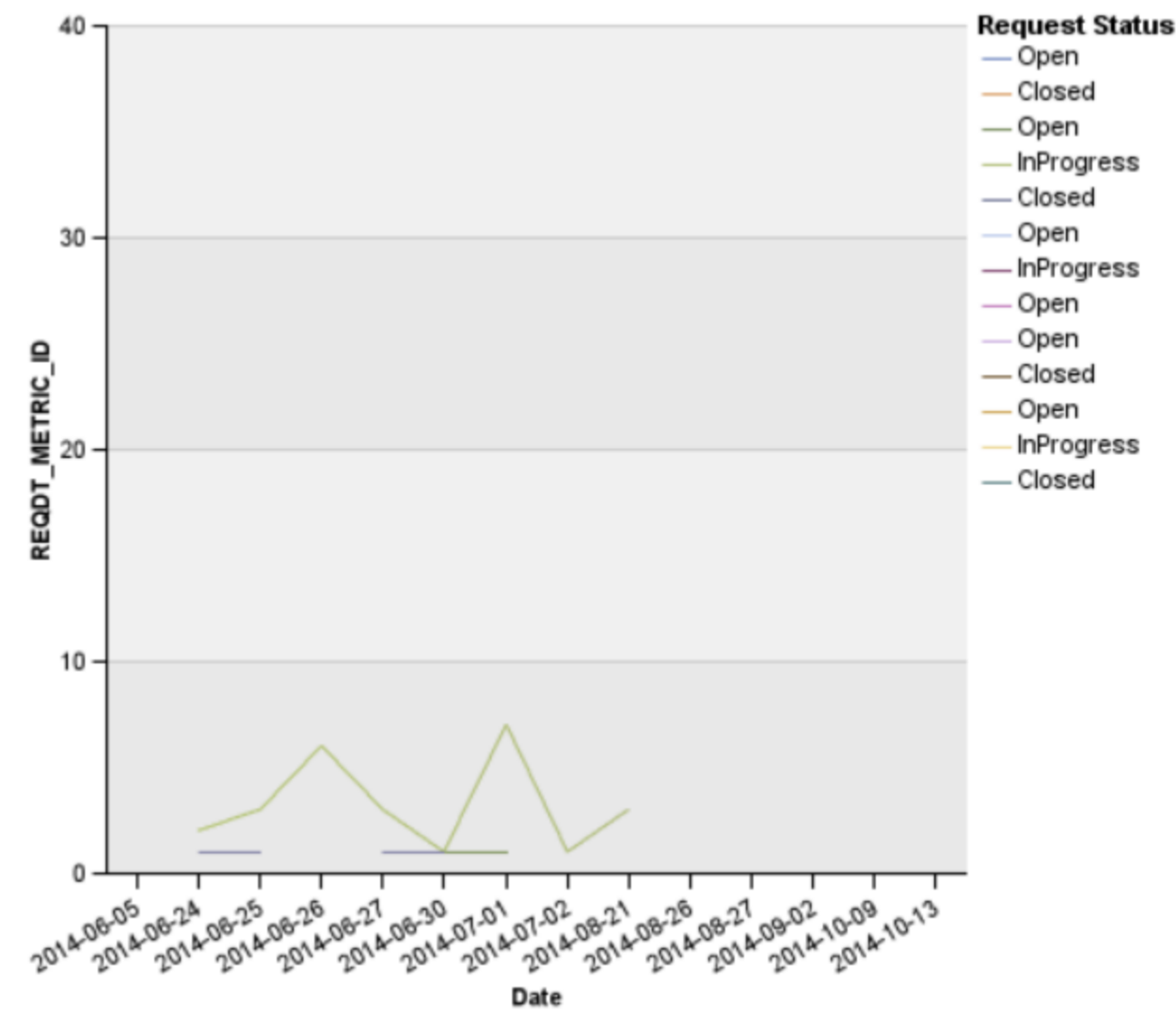
Demo 2 – Defect Severity, Priority by State

– Defect State by Iteration





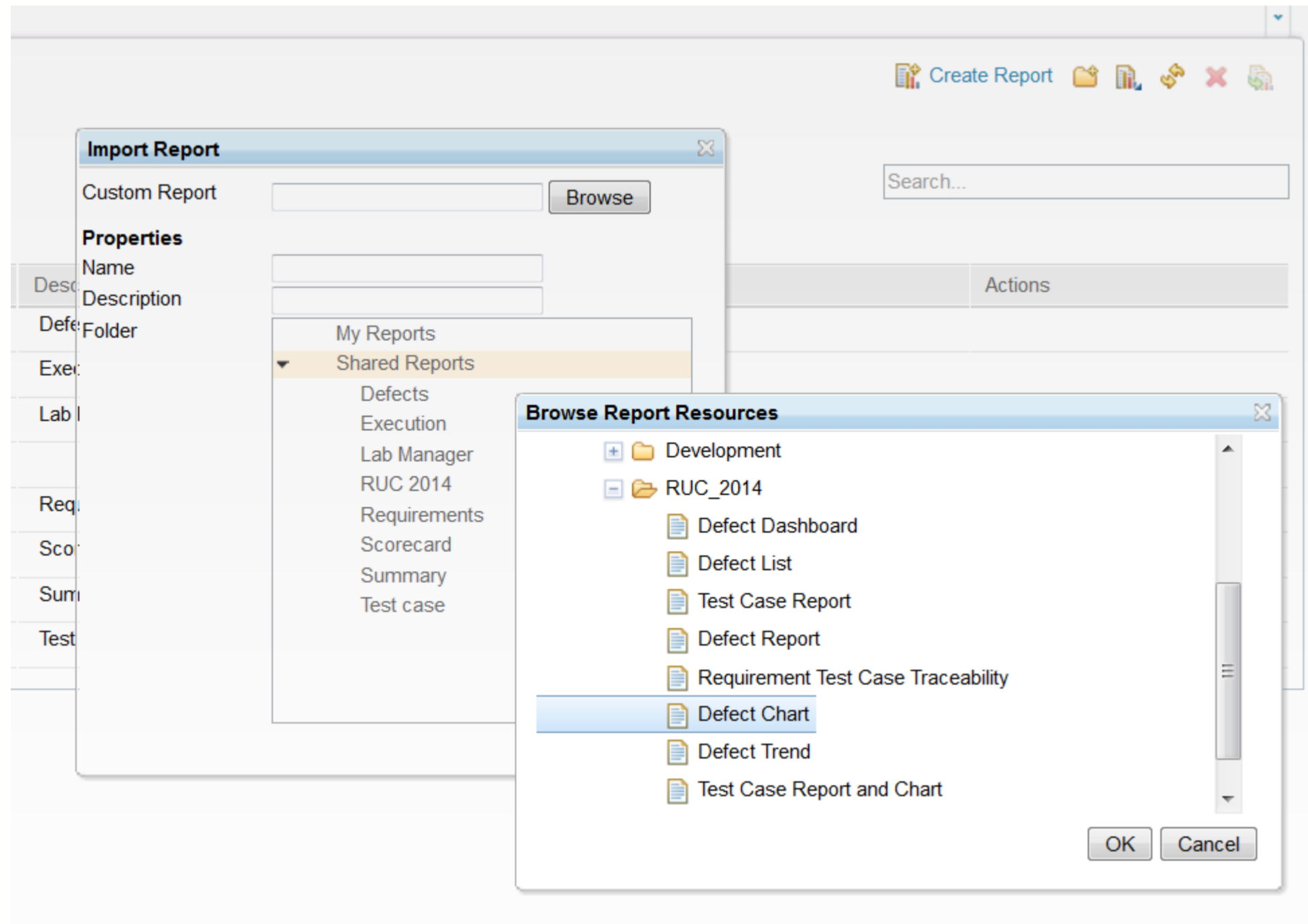
Demo 3 – Trend Metrics (Defects, Test Execution)



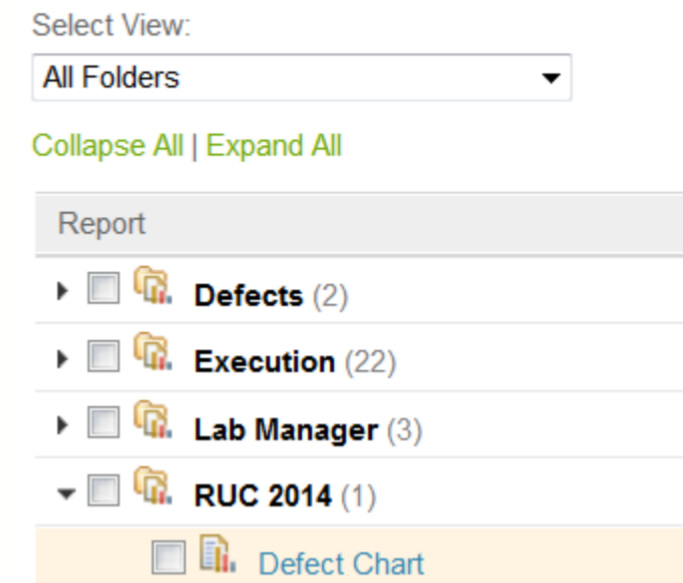


Demo 4 – Run Report

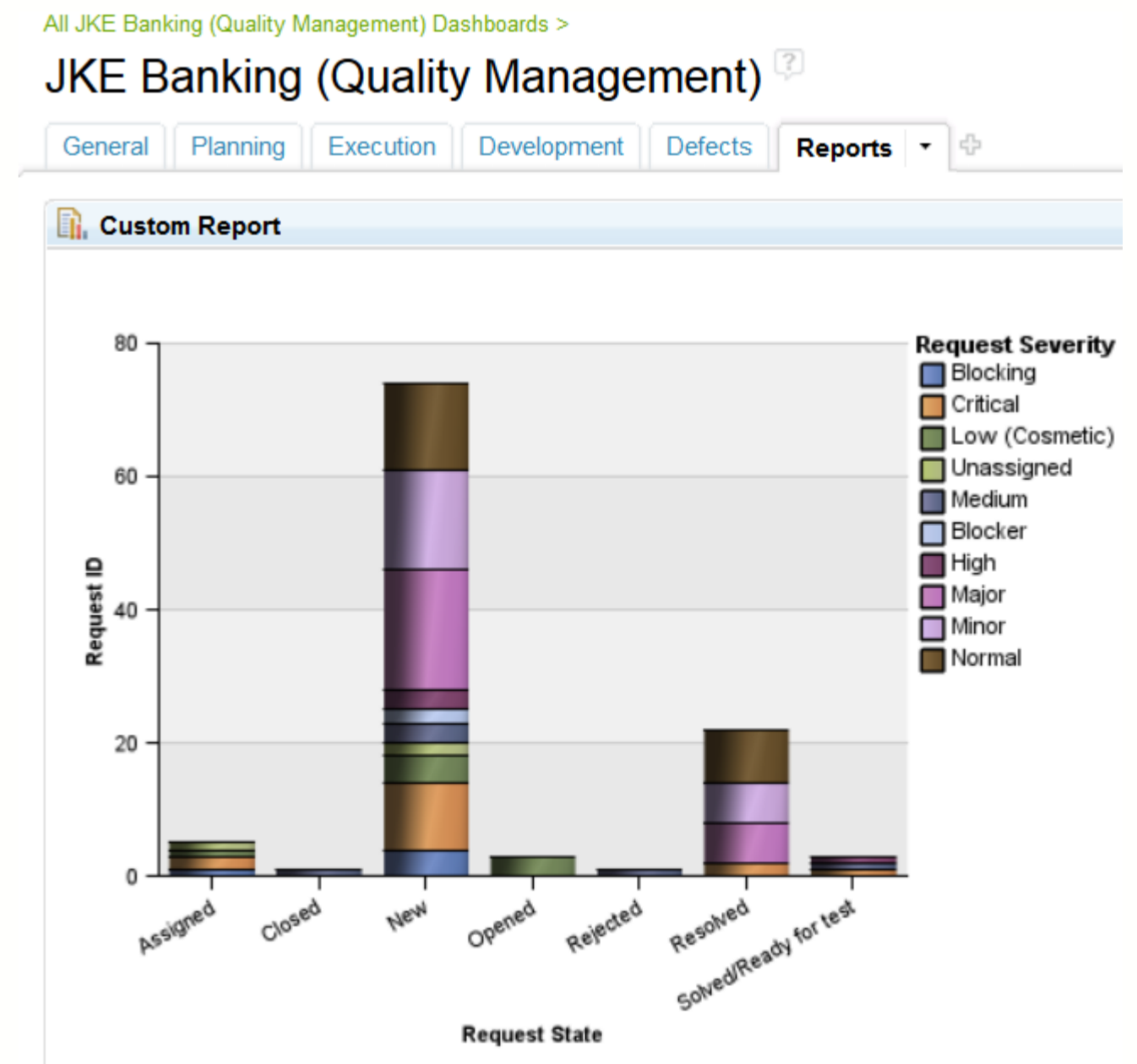
Import into CLM Application



Shared Reports



Available as a Report



Display on Dashboard using Custom Report widget



'Need to know' when using Rational Insight

- Reporting is against the data warehouse (data is not real time) so update to date as of last data collection.
- Metrics data compared to raw data (both are available)
- Rational Insight compared to RRDI (eg Data Sources).
- Spend time working out the result (data and relations) before choosing which tables to use.
- Where and how can your custom reports be accessed (eg. as a dashboard; within CLM applications).
- Reports can be scheduled and published.



Conclusion/Summary

- Create YOUR reports (lists and charts) containing CLM data.
- Create YOUR metrics and publish automatically.

For example

- We need a chart showing defect status by XYZ.
- I want to see my test progress by test phase.
- I need to produce a compliance document where I need to prove all my requirements have been implemented and tested.
- I want to publish reports and dashboards for users who do not want to log into CLM applications.

Q&A



Defect Dashboard

