



# easyBI

**How To Think Report Wise**

**Ilze Leite-Apine**



**Ilze Leite-Apine**

**“I will explain everything”**



**eazyBI**

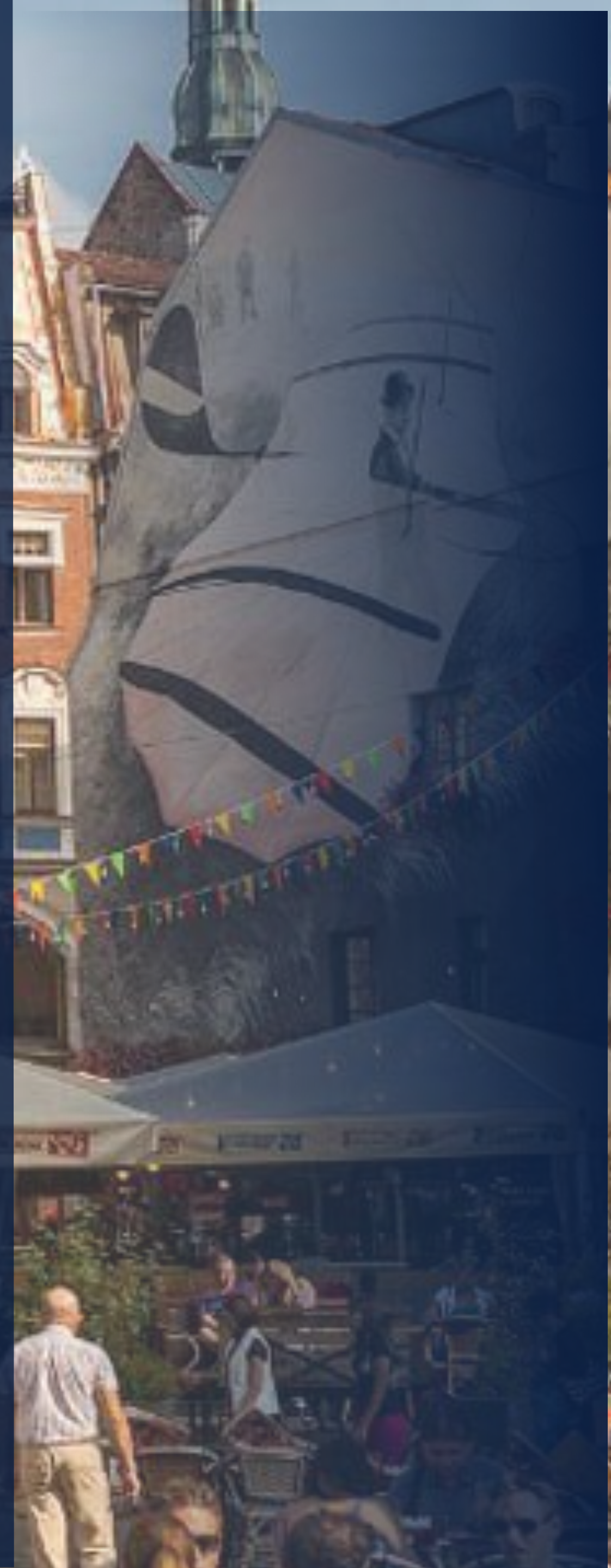
**Community Days  
May 24-25, 2018**



**How to ask  
question?**

**How to choose  
report layout?**

**Let's create!**

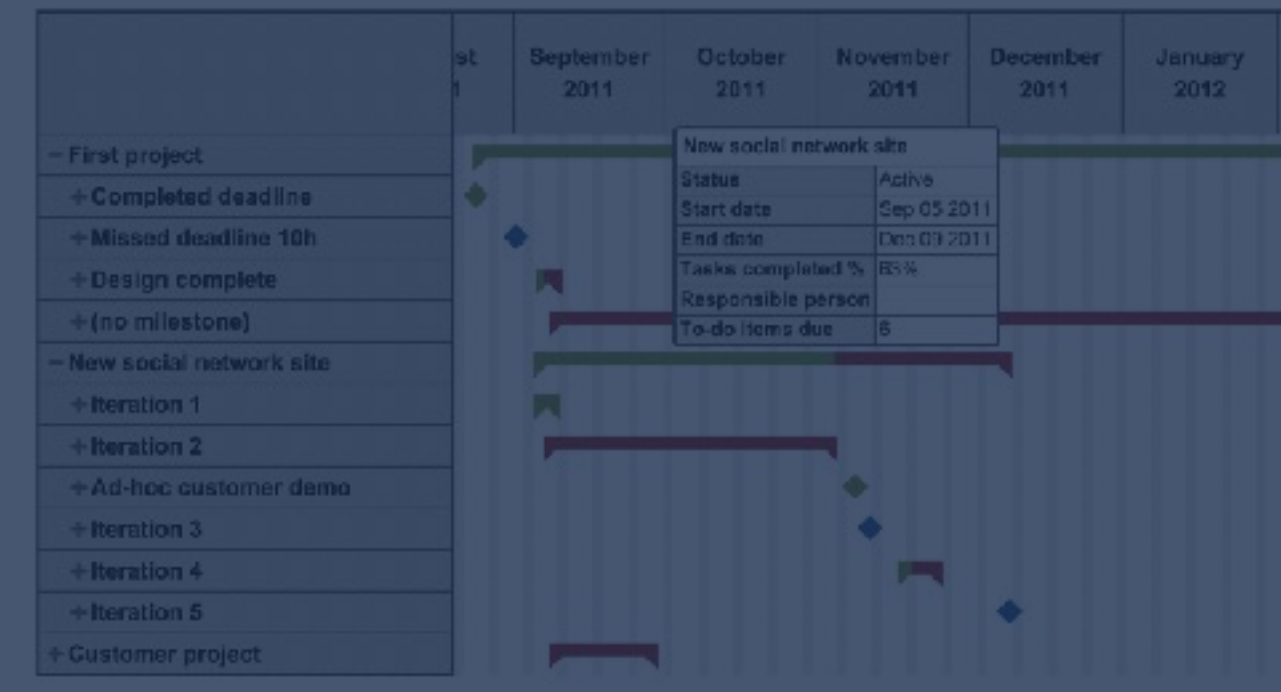
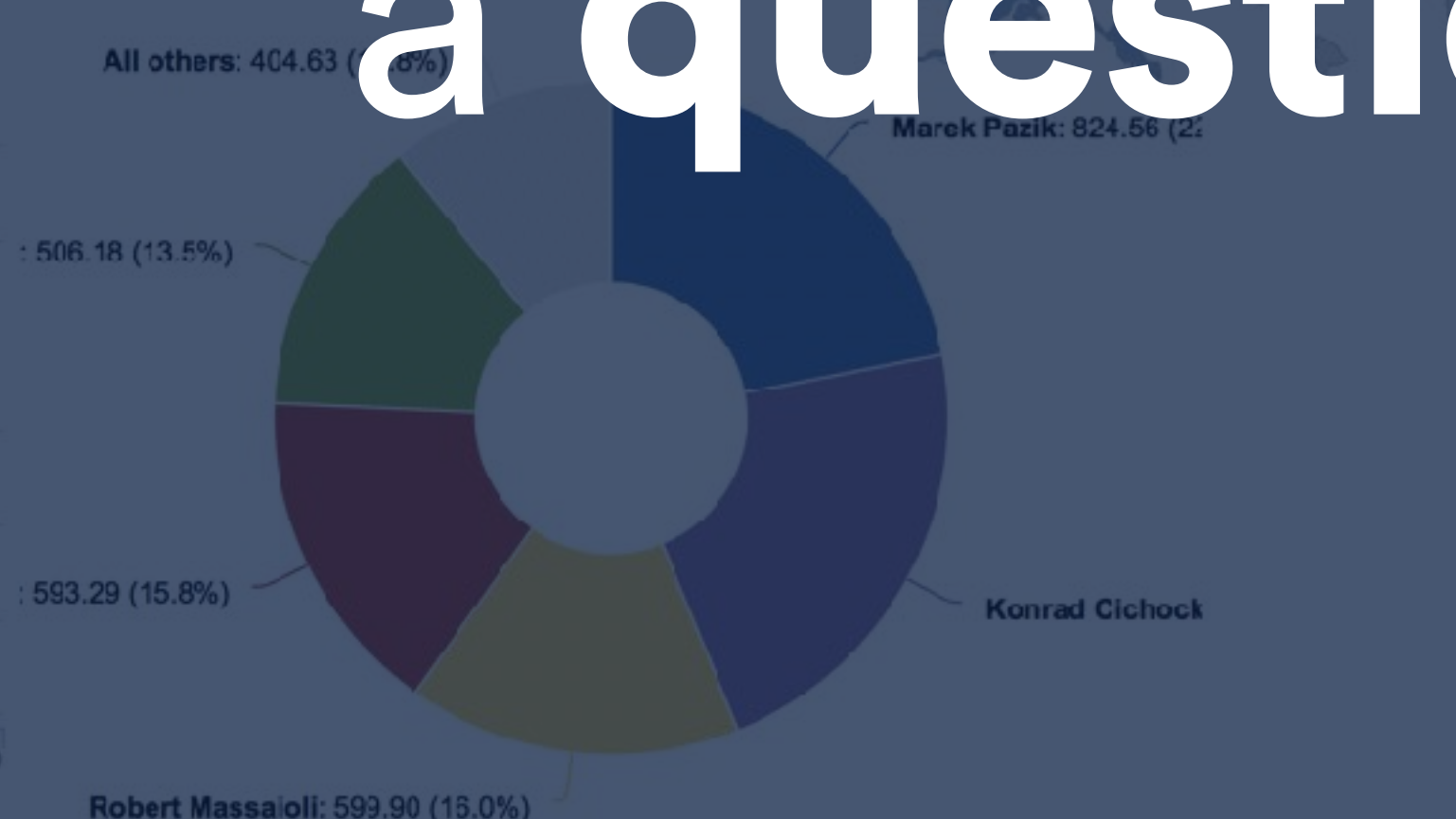
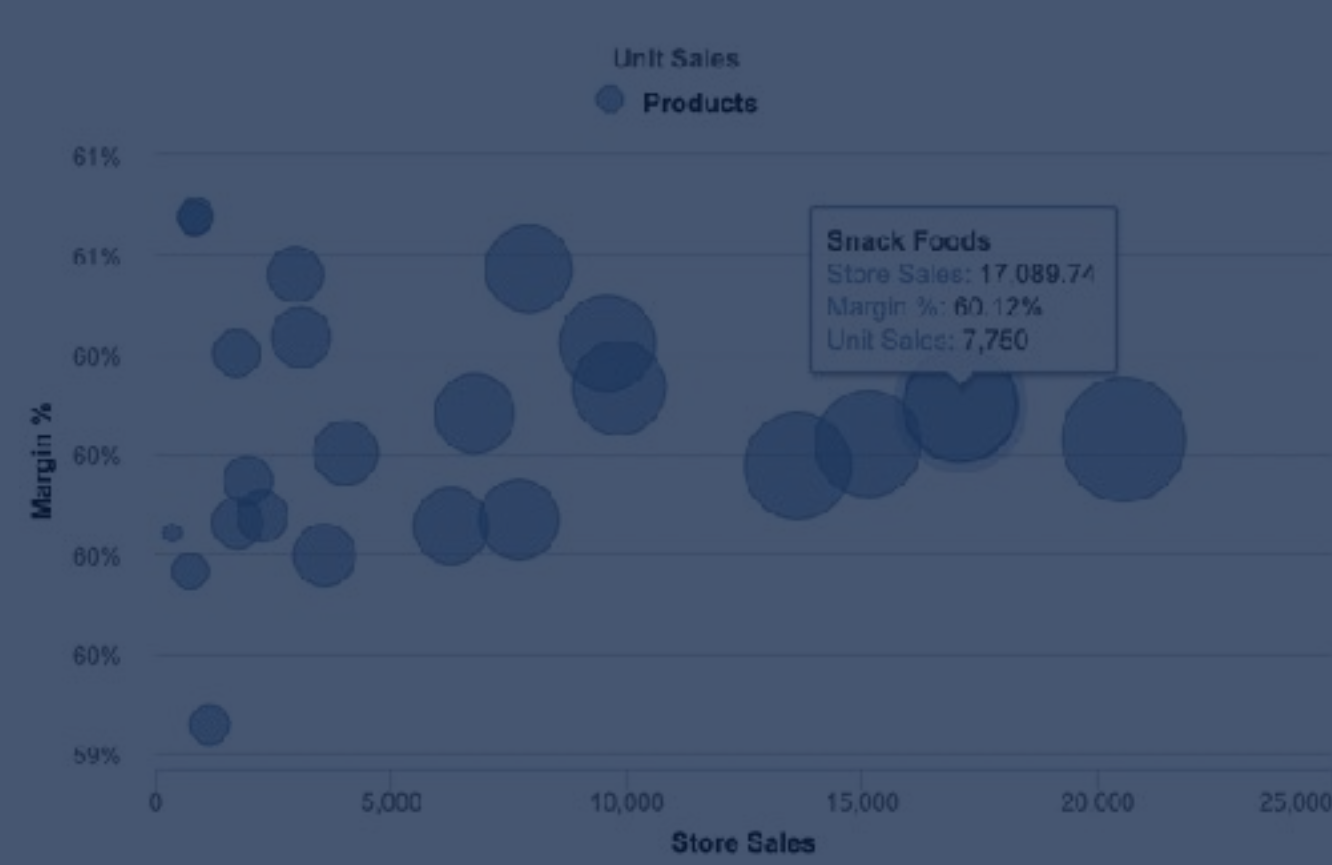
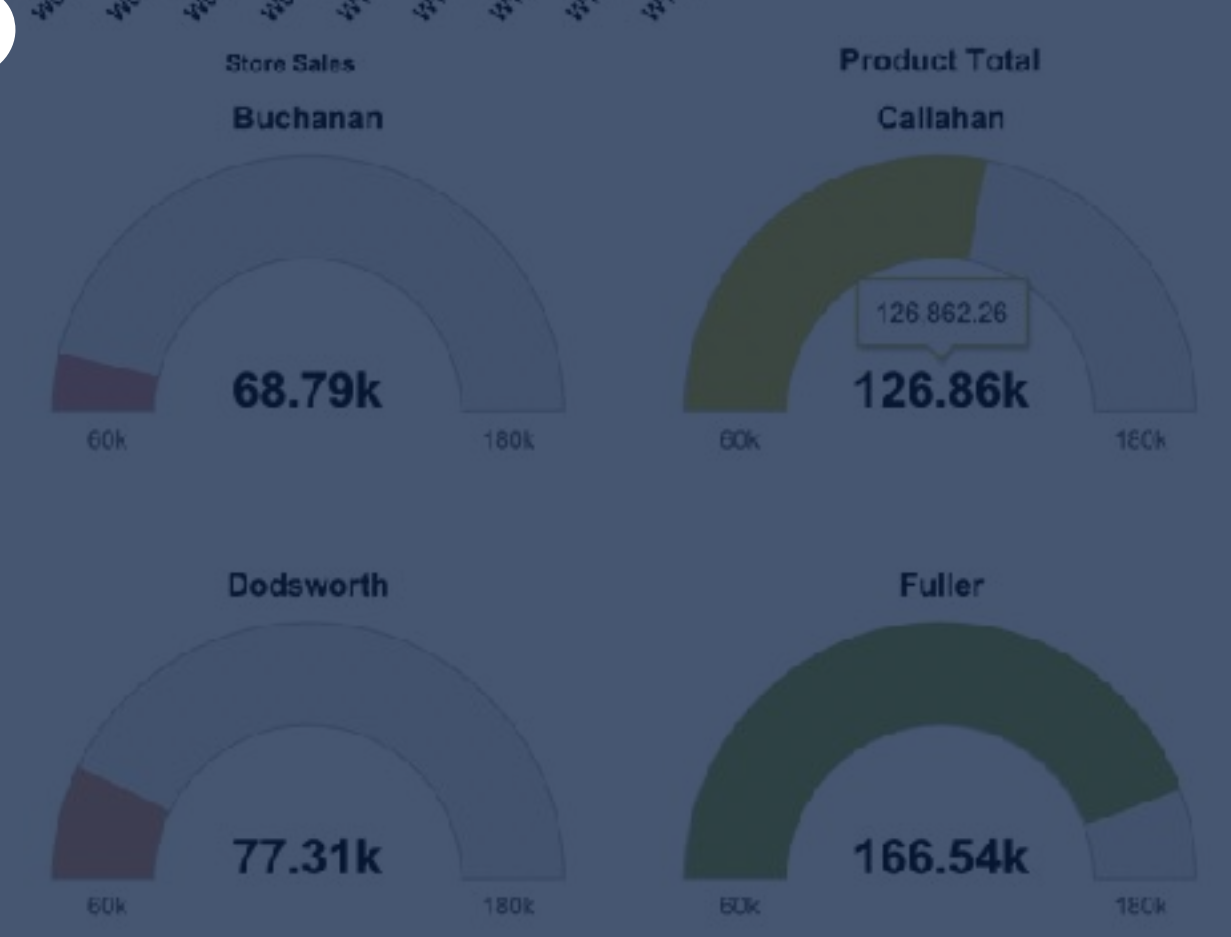
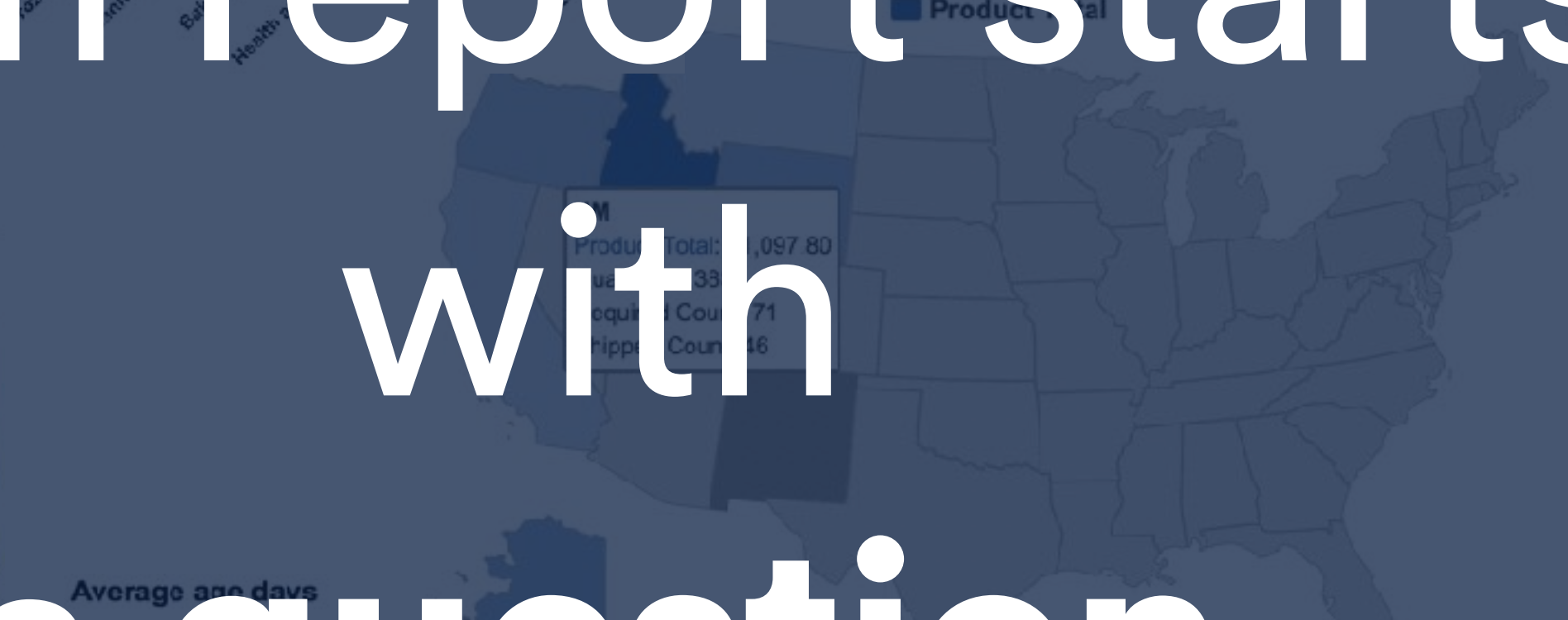






# Each report starts with a question

	Store Sales	Store Cost	Unit	Average
- All Customers	136,626.35	55,752,240		
- USA	136,626.35	55,752,240		
+ CA	36,175.20	14,431,085		
- OR	40,170.28	16,081,073		
+ Albany	4,491.26	1,782,817		
+ Beaverton	2,407.97	950,359		
+ Corvallis	5,695.13	2,281,248		
+ Lake Oswego	2,262.56	907,8483	1,102	6.41
+ Lebanon	5,934.62	2,390,0872	2,825	6.49
+ Milwaukie	2,802.32	1,155,6025	1,345	6.02
+ Oregon City	2,324.62	929,0752	1,113	6.55
+ Portland	2,122.12	847,5187	1,001	6.55
+ Salem	4,251.81	1,697,6039	2,104	6.28
+ W. Linn	2,181.81	871,0418	1,041	6.59



# How to build a report?

## Data

What data answers the question?

---

## Representation

How to tell the story?

## Implementation

How to create the report?

# How to build a report?

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# How to build a report?

## Data

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---

**How much does it take  
for your team to get features  
done?**

**Are you improving?**

# How to build a report?

## Data

What data answers the question?

---

## Representation

How to tell the story?

## Implementation

How to create the report?

**Data**

---

**Content**

Availability

# Translate business terms to Jira terms

What is “actual work”?

**Data**

---

**Content**

Availability

Translate business terms to  
Jira terms

**Uncover buzz words**

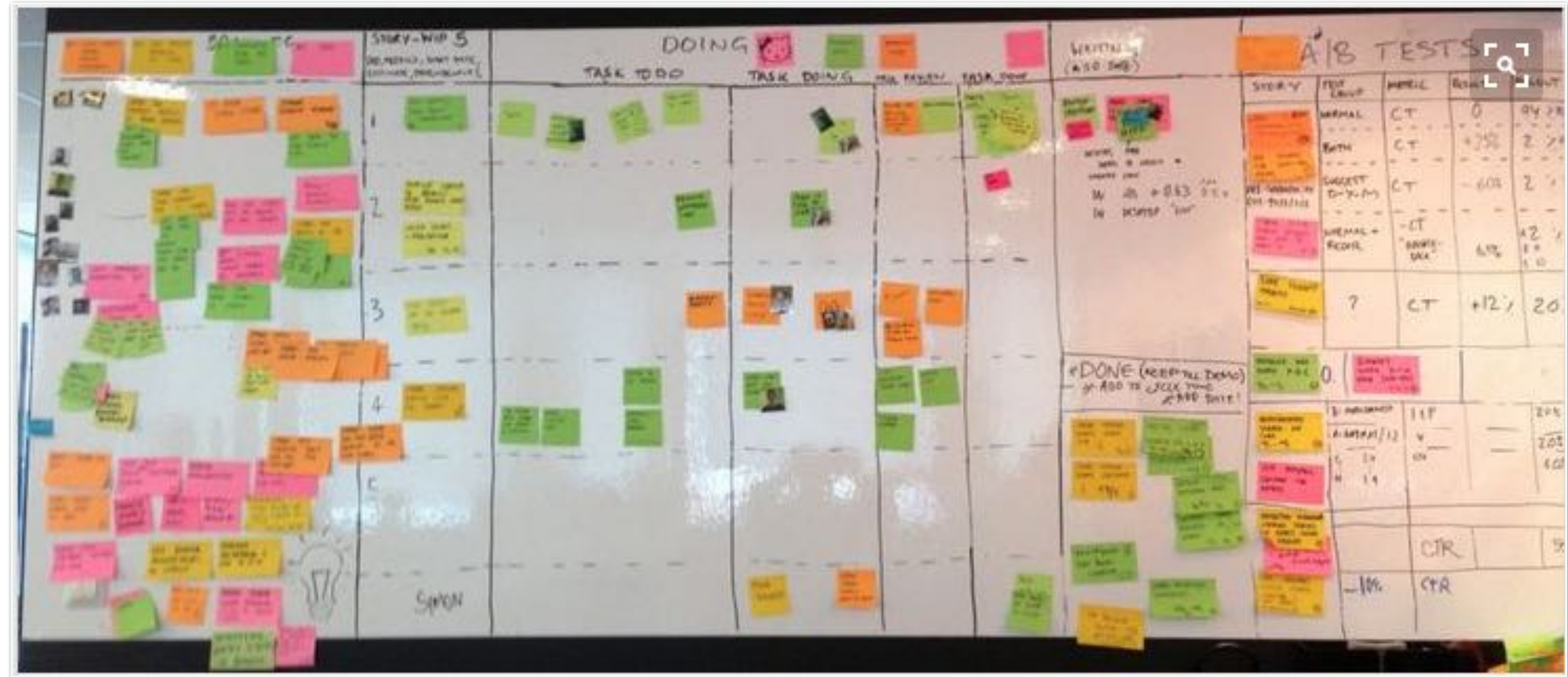
**What is “Team”?**

Data

# Do we record the data accurately?

Content

Availability



**Data**

---

Content

**Availability**

Do we record the data accurately?

**Where those data are stored?**

**Map data from different sources**

# How to build a report?

## Data

What data answers the question?

## Representation

How to tell the story?

---

## Implementation

How to create the report?



# Representation

---

## Viewpoint

Numbers

Filters

Chart

# Purpose of the report

Base for invoices vs trend analysis

# Representation

---

## Viewpoint

Numbers

Filters

Chart

Purpose of the report

## Report users

Team members vs company board vs customer

**Representation**

---

**Viewpoint**

Numbers

Filters

Chart

Purpose of the report

Report users

**Overview in time or a snapshot**

# Representation



Viewpoint

**Numbers**

Filters

Chart

## What metrics to use?

Issue or transition count

Logged or estimated hours

Total or average or cumulative

Ratio

Value change

Max/min/med value

# Representation

---

Viewpoint

**Numbers**

Filters

Chart

What metrics to use?

**How to get a countable  
outcome from the input data?**

Logic and mathematics

# Representation

---

Viewpoint

**Numbers**

Filters

Chart

What metrics to use?

How to get a countable outcome from the input data?

**Metrics for context**

**Combine metrics to interpret the situation more clearly**

# Representation

---

Viewpoint

Numbers

**Filters**

Chart

## What is the report context?

Specific issue types

Specific statuses

Last month/year

# Representation

---

Viewpoint

Numbers

**Filters**

Chart

What is the report context?

**How other users would like to filter the report?**

By themselves

By their project



Representation

---

Viewpoint

Numbers

Filters

Chart

Read [eazybi.com](https://eazybi.com) blog post

## Data Visualization – How to Pick the Right Chart Type?

# Representation

---

Viewpoint

Numbers

Filters

**Chart**

## Choose chart type

Choose by data type and report goals,  
not by chart type “fashion trends”

# Representation

---

Viewpoint

Numbers

Filters

**Chart**

Choose chart type

**Don't overuse charts**

**Pie and Gantt are not the only options!**

# Representation

---

Viewpoint

Numbers

Filters

**Chart**

Choose chart type

Don't overuse charts

**Keep on conventions**

**Reg, yellow, green**

**Full line for actual data, dash line for forecasts**

# Representation

---

Viewpoint

Numbers

Filters

**Chart**

Choose chart type

Don't overuse charts

Keep on conventions

**Try and adjust**

# How to build a report?

## Data

What data answers the question?

## Representation

How to tell the story?

## Implementation

How to create the report?

---

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**How much does it take  
for your team to get features  
done?**

**Are you improving?**

---

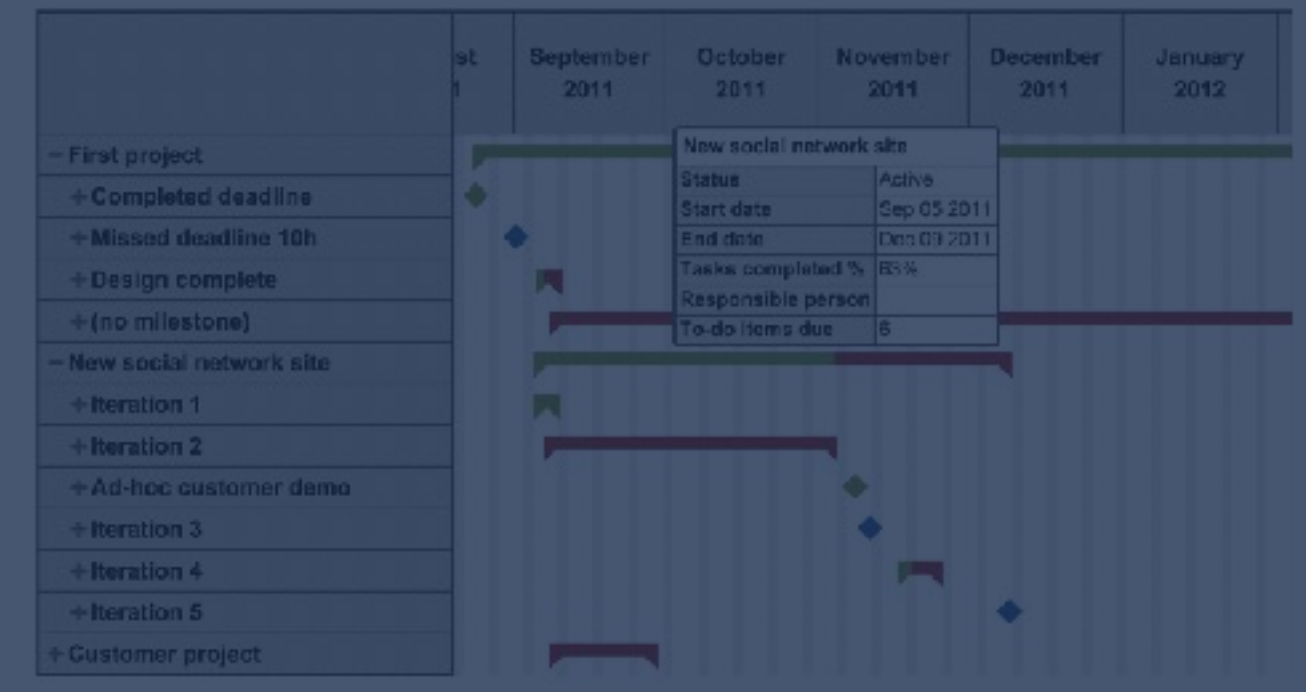
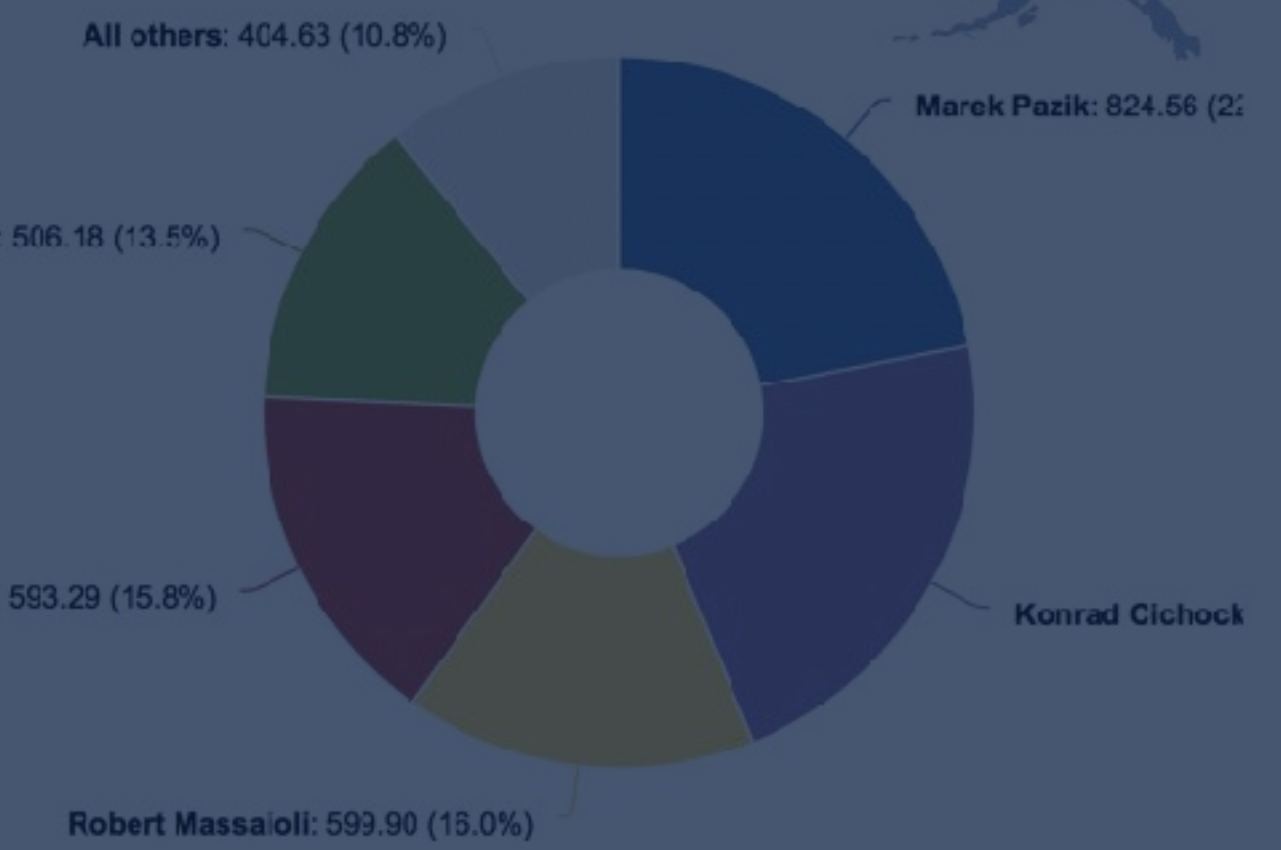
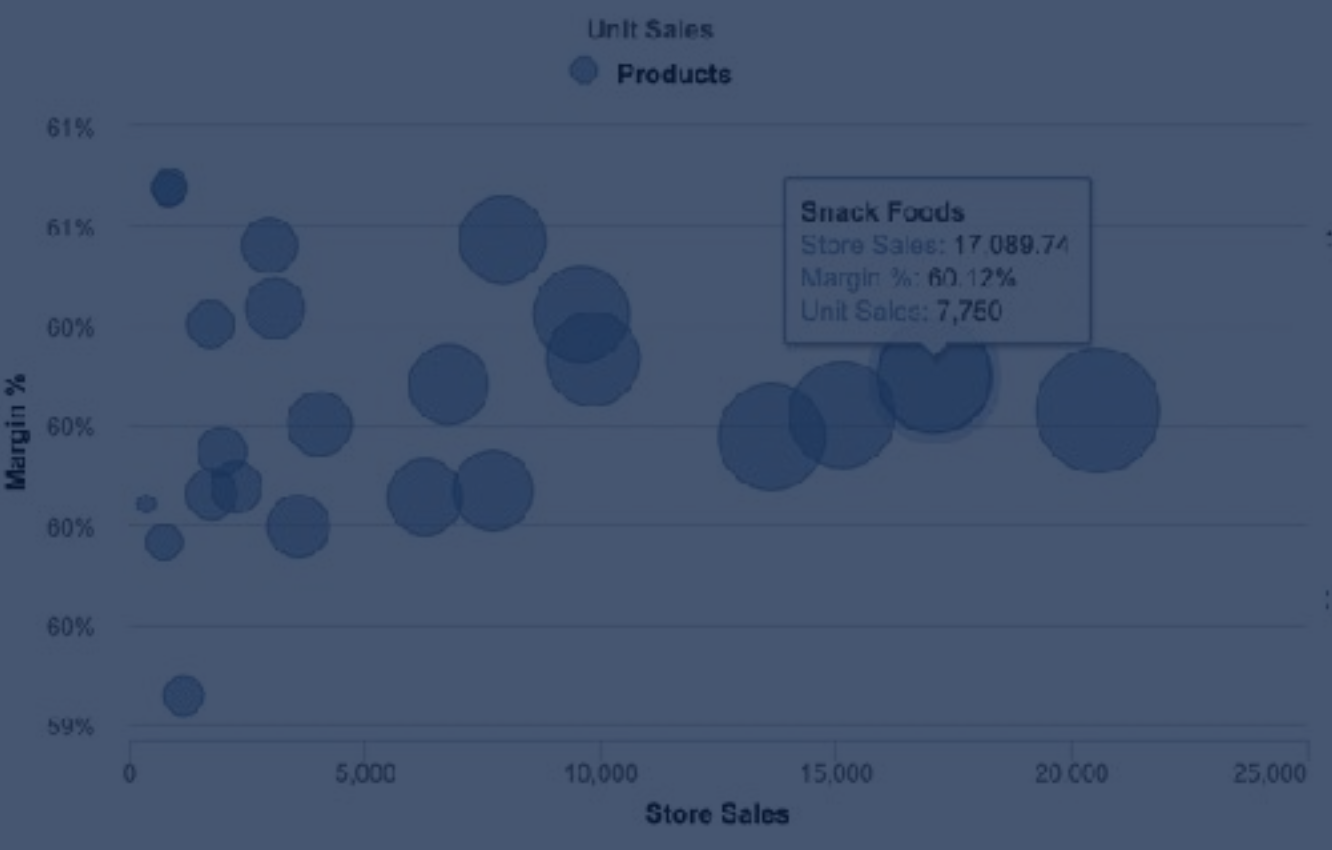
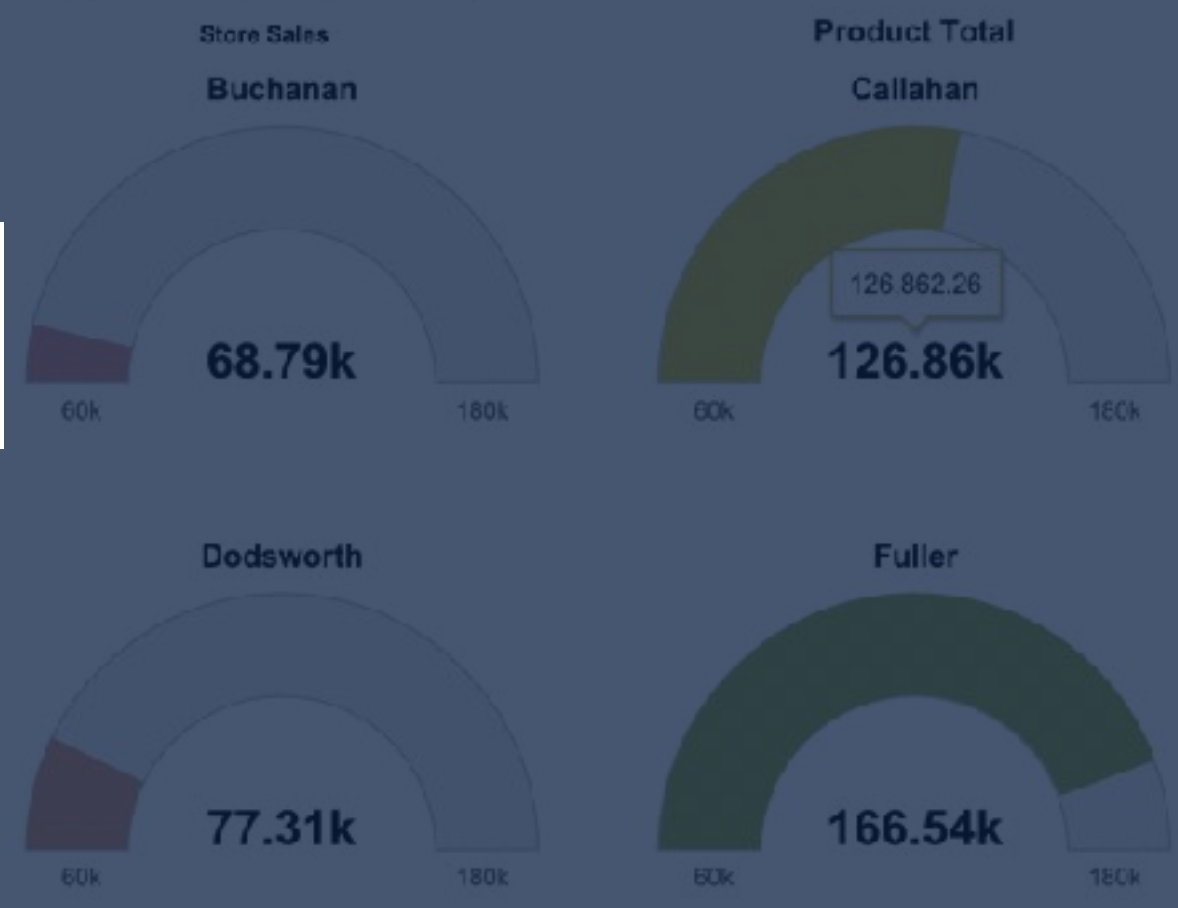
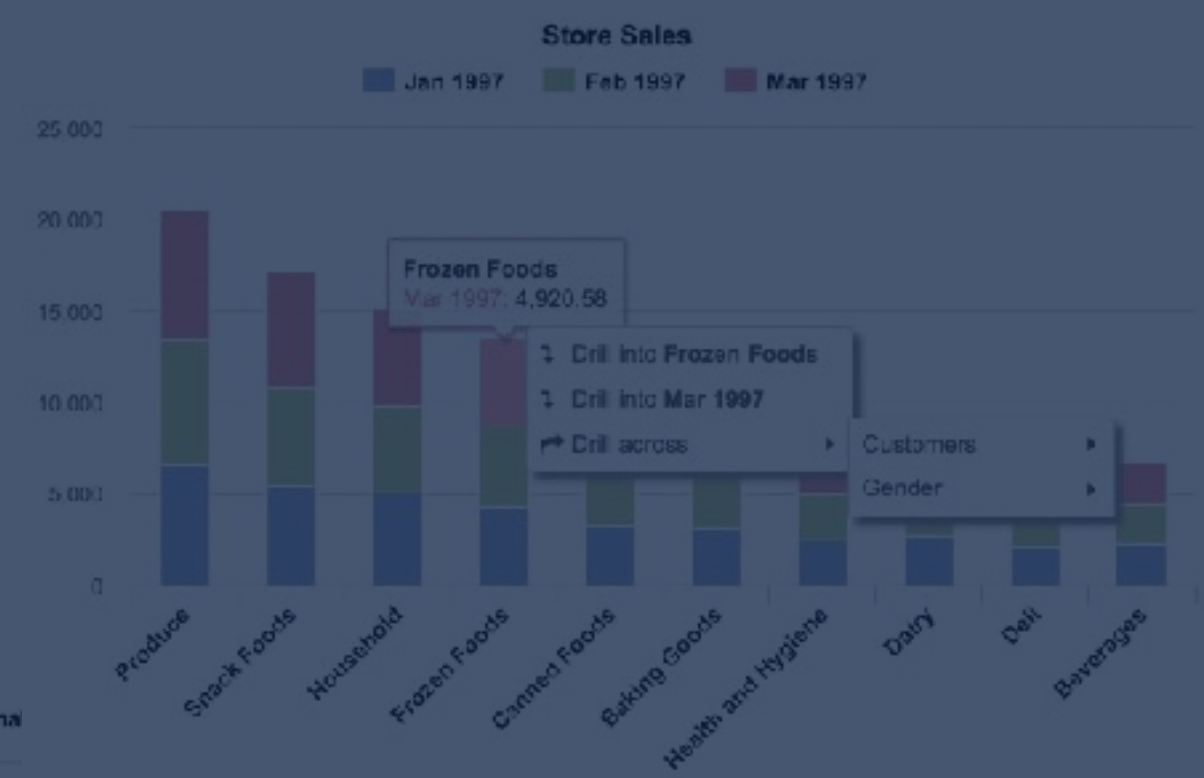
**How many workdays (in average)  
issues with feature issue types  
have spend in progress statuses  
and  
how many issues were in progress;  
per projects,  
monthly for this and previous year?**



	Store Sales	Store Cost	Unit	Average
- All Customers	136,626.35	55,752.240		
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+ W. Linn	2,161.61	871.0418	1,041	6.59

- Drill across
- Select this
- Remove
- Order by
- Top rows
- Bottom rows
- Filter rows
- Call formatting

- Time
  - Year
  - Quarter
  - Month
  - Day
  - Weekly
  - Year
  - Week
  - Day
  - Fiscal
  - Year
  - Quarter
  - Month
  - Day



# Use case in eazyBI

# Representation

Viewpoint

Numbers

Filters

Chart

Dimensions

▶ Measures	▶ Project	▶ Reporter
▶ Assignee	▶ Issue Type	▶ Priority
▶ Status	▶ Resolution	▶ Affects Version
▶ Fix Version	▶ Security Level	▶ Issue
▶ Logged by	▶ Label	▶ Time
▶ Transition Status	▶ Transition	▶ Transition Author
▶ Age interval	▶ Resolution interval	
Agile <a href="#">hide</a>		
▶ Epic Link	▶ Sprint	
Service Desk <a href="#">hide</a>		
▶ Time to resolution Breached	▶ Time to resolution State	

# Representation

Viewpoint

Numbers

Filters

Chart

Dimensions

▸ Measures	▸ Project	▸ Reporter
▸ Assignee	▸ Issue Type	▸ Priority
▸ Status	▸ Resolution	▸ Affects Version
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<b>Agile</b> <a href="#">hide</a>		
▸ Epic Link	▸ Sprint	
<b>Service Desk</b> <a href="#">hide</a>		
▸ Time to resolution Breached	▸ Time to resolution State	

# Representation

Viewpoint

Numbers

Filters

Chart

▼ **Measures**

▶ **Select members**

▼ **Calculated members**

**Default** [hide](#)

Open issues [edit](#) Average resolution days [edit](#) Average resolution workdays [edit](#) Average closing days [edit](#)

Average age days [edit](#) Average age workdays [edit](#) Original estimated hours with sub-tasks [edit](#)

Remaining estimated hours with sub-tasks [edit](#) Hours spent with sub-tasks [edit](#) Issues history [edit](#)

Average days in transition status [edit](#) Average workdays in transition status [edit](#) Transition to status first date [edit](#)

Transition to status last date [edit](#) Transition from status first date [edit](#) Transition from status last date [edit](#)

Transitions to assignee [edit](#) Transitions from assignee [edit](#) Remaining estimated hours history [edit](#) Time days ago [edit](#)

**Agile** [show 30 measures](#)

**Epic burn-down** [show 7 measures](#)

**Issue properties** [show 26 measures](#)

**Other properties** [show 6 measures](#)

**Predicted** [show 9 measures](#)

**Service Desk - Time to resolution** [hide](#)

Time to resolution - Met [edit](#) Time to resolution - Breached [edit](#) Time to resolution - Met % [edit](#)

Time to resolution - Breached % [edit](#) Time to resolution - Average hours [edit](#)

**User defined** [show 94 measures](#)

[Define new](#)

# Representation

Viewpoint

Numbers

Filters

Chart

▼ **Measures**

▶ **Select members**

▼ **Calculated members**

**Default** [hide](#)

Open issues [edit](#) Average resolution days [edit](#) Average resolution workdays [edit](#) Average closing days [edit](#)

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Time to resolution - Breached % [edit](#) Time to resolution - Average hours [edit](#)

**User defined** [show 94 measures](#)

[Define new](#)

# Representation

Viewpoint

Numbers

Filters

Chart

▼ **Measures**

▶ **Select members**

▼ **Calculated members**

**Default** [hide](#)

Open issues [edit](#) Average resolution days [edit](#) Average resolution workdays [edit](#) Average closing days [edit](#)

Average age days [edit](#) Average age workdays [edit](#) Original estimated hours with sub-tasks [edit](#)

Remaining estimated hours with sub-tasks [edit](#) Hours spent with sub-tasks [edit](#) **Issues history [edit](#)**

**Average days in transition status [edit](#)** Average workdays in transition status [edit](#) Transition to status first date [edit](#)

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**Service Desk - Time to resolution** [hide](#)

Time to resolution - Met [edit](#) Time to resolution - Breached [edit](#) Time to resolution - Met % [edit](#)

Time to resolution - Breached % [edit](#) Time to resolution - Average hours [edit](#)

**User defined** [show 94 measures](#)

[Define new](#)

# Representation

Viewpoint

Numbers

Filters

Chart

**Pages**

- ▶ Transition Status
- ▶ Issue Type
- ▶ Project

**Rows** Nonempty

- ▼ Time
- ▶ Select members
- ▶ Calculated members

**Columns** ▶ Measures

Table Bar Line Pie Scatter Timeline Map Gantt Gauge

✕ ↶ ↷ 🗨️ ⬇️

In Progress ▼ New Feature, Improvement, Story ▼ All Projects ▼

	Issues history	Average workdays in transition status
+ Apr 2017	12	7.43
+ May 2017	12	5.04
+ Aug 2017	14	2.51
...	..	...

# Representation

Viewpoint

Numbers

Filters

Chart

**Pages**

- ▶ Transition Status
- ▶ Issue Type
- ▶ Project

**Rows** Nonempty

- ▼ Time
- ▶ Select members
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Table Bar Line Pie Scatter Timeline Map Gantt Gauge

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	Issues history	Average workdays in transition status
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...	..	...



# Representation

Viewpoint

Numbers

Filters

Chart

The screenshot displays a BI tool interface with several configuration panels and a data table. The **Pages** panel on the left contains three items: **Transition Status**, **Issue Type**, and **Project**, all of which are highlighted with a red border. The **Columns** panel shows a dropdown menu with **Measures** selected. Below these panels is a visualization toolbar with options for **Table**, **Bar**, **Line**, **Pie**, **Scatter**, **Timeline**, **Map**, **Gantt**, and **Gauge**. The **Table** view is currently selected. A filter bar below the toolbar contains three dropdown menus: **In Progress**, **New Feature, Improvement, Story**, and **All Projects**, all highlighted with a red border. The **Rows** panel on the left includes a **Nonempty** button and three items: **Time**, **Select members**, and **Calculated members**. The main data table is a pivot table with the following structure:

	Issues history	Average workdays in transition status
+ Apr 2017	12	7.43
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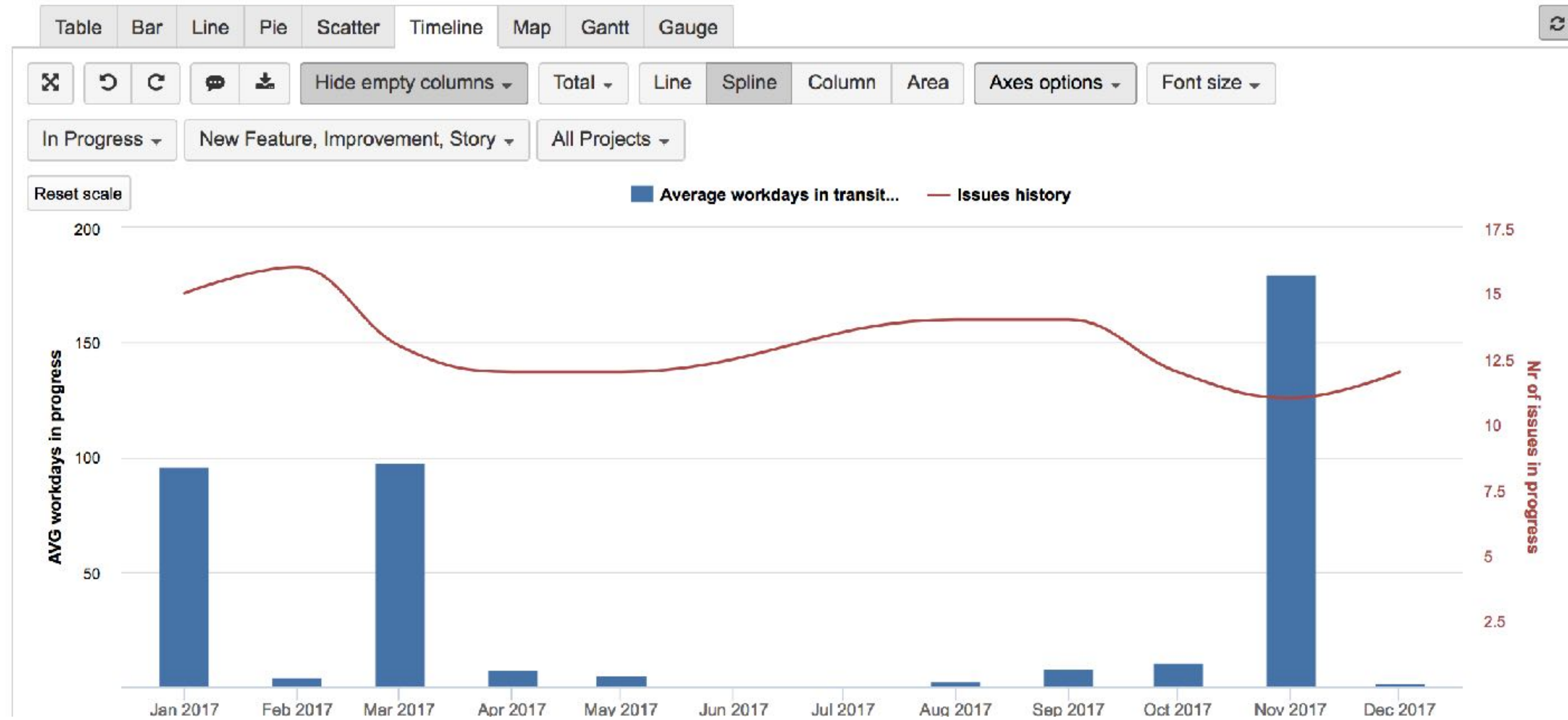
# Representation

Viewpoint

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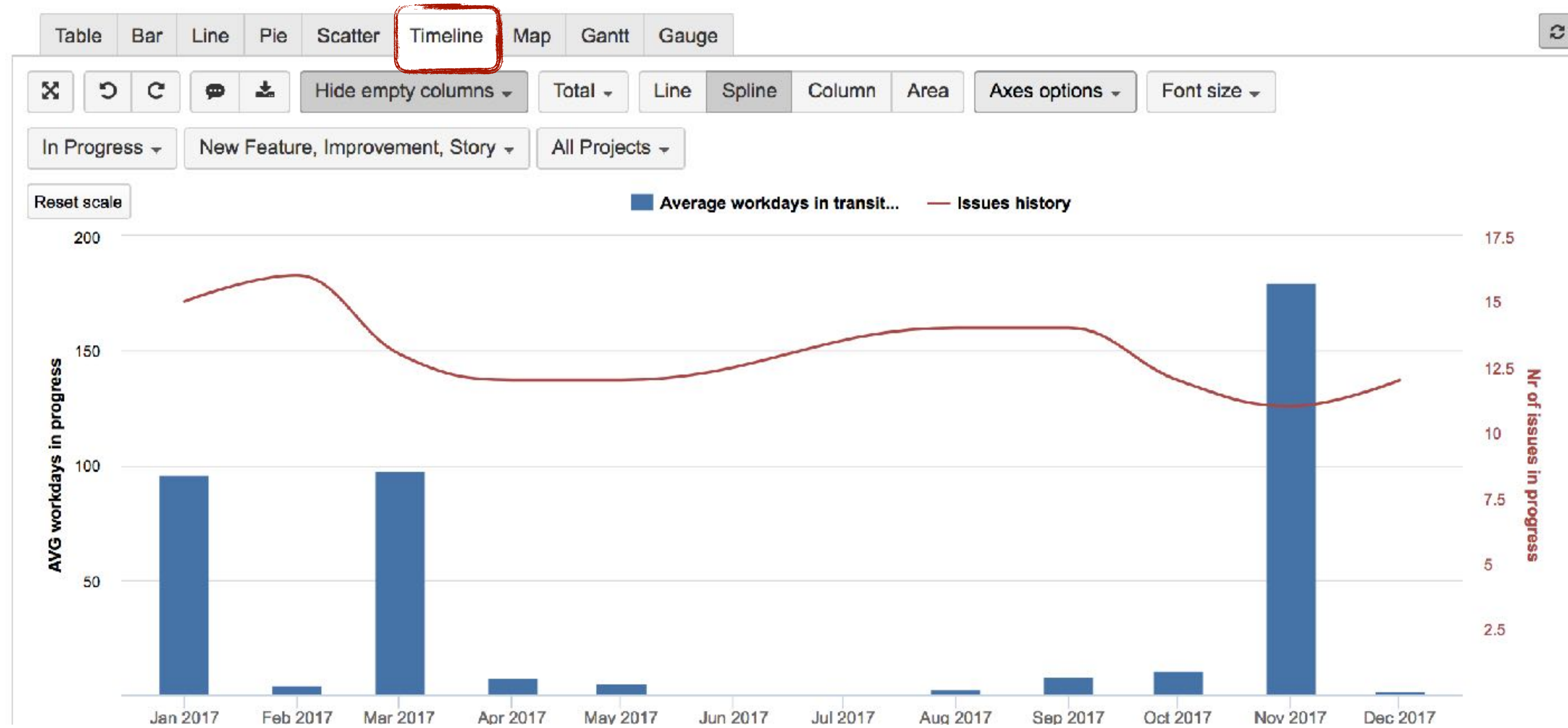
# Representation

Viewpoint

Numbers

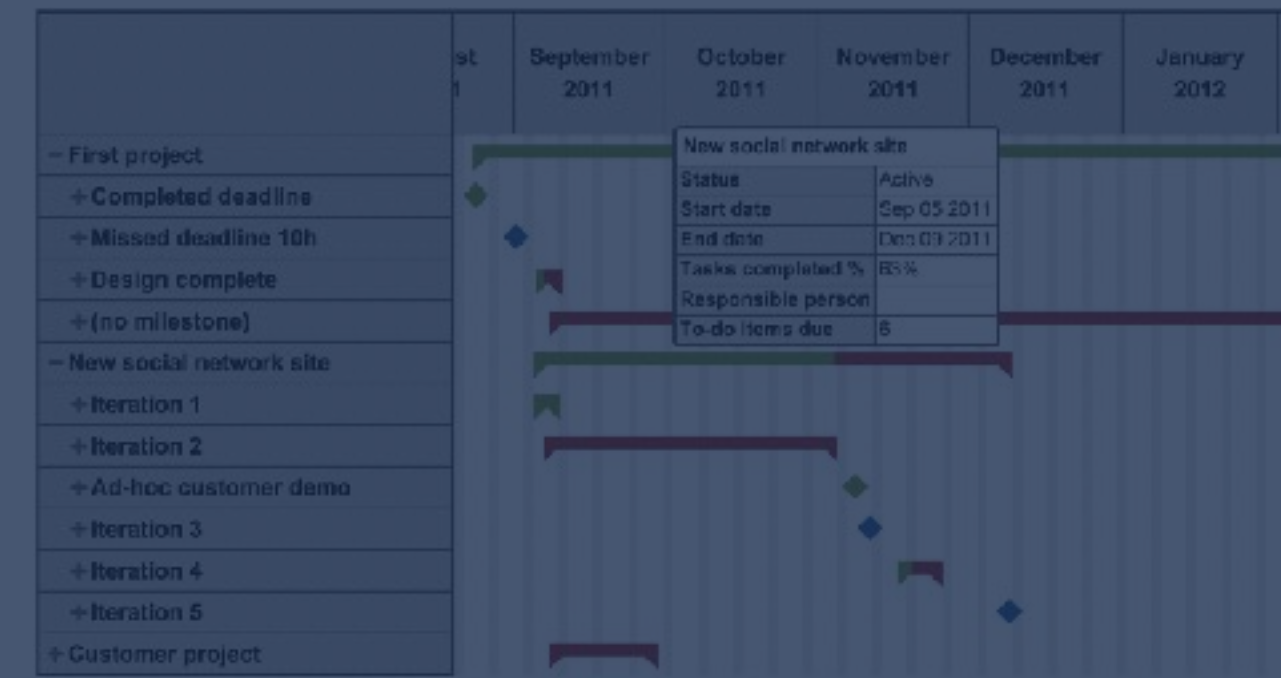
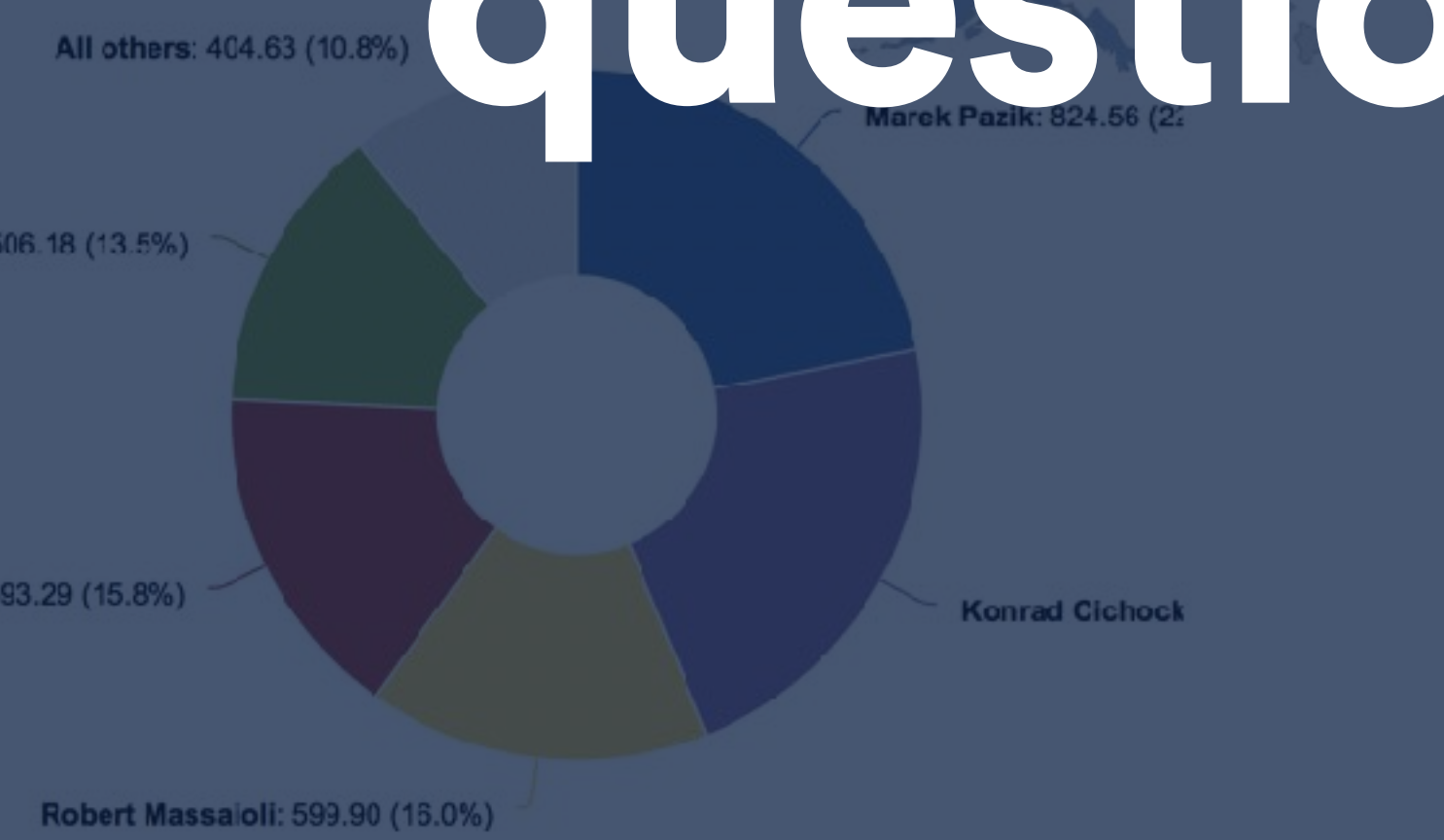
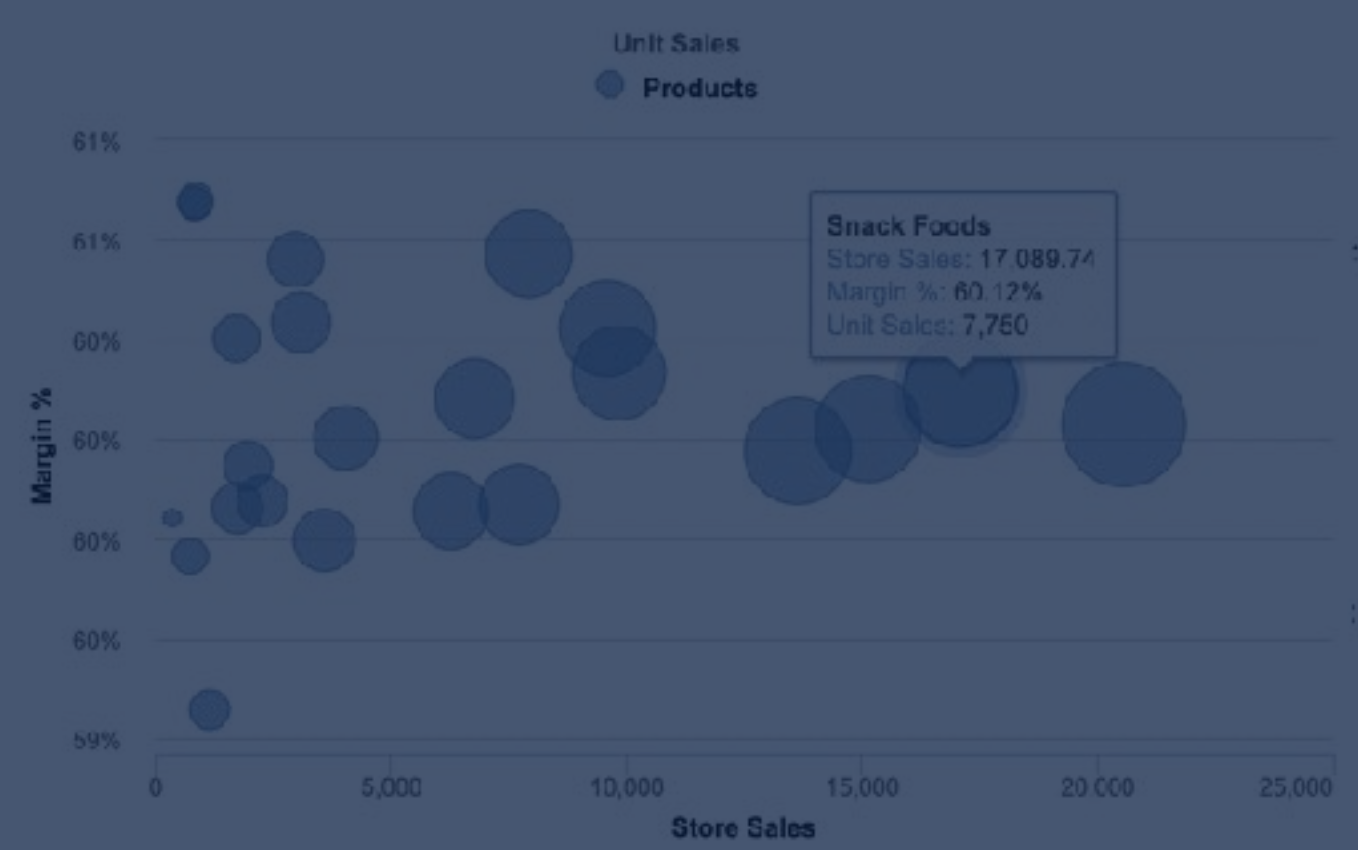
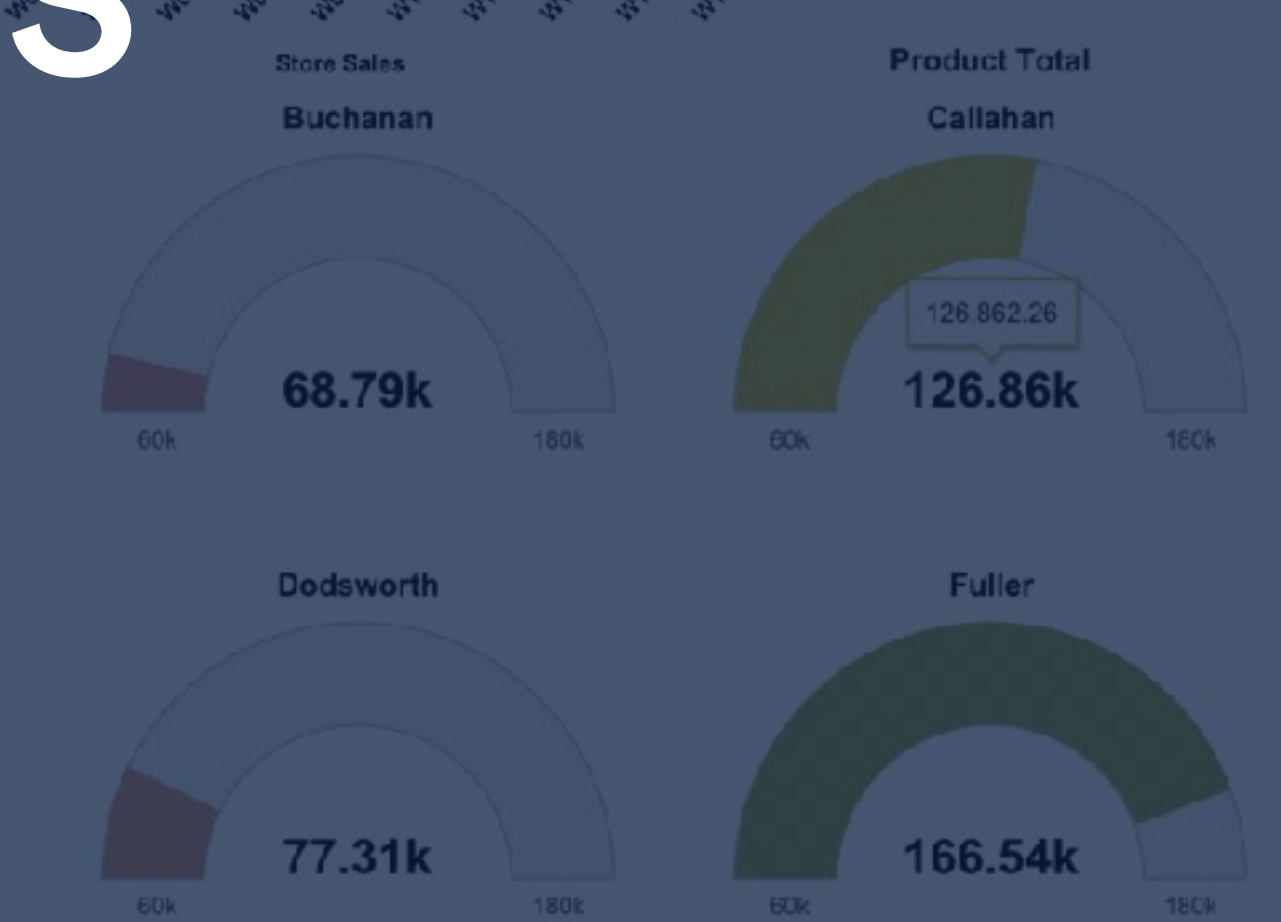
Filters

Chart



# Each answer leads to the next question

	Store Sales	Store Cost	Unit	Average
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[community.eazybi.com](https://community.eazybi.com)

[support@eazybi.com](mailto:support@eazybi.com)