

Project Reporting With eazyBI and Profields for Jira



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Agenda



Report User

- Who are Synergy Learning
- Before eazyBI
- Quick Wins
- Reports overview



Solution Developer

- Solution Overview
- Data Pipeline
- eazyBI
- Calculated Member



About me

From: Scotland

Developer

At New Veve for ~1.5 years

Hobbies

1. Badminton 
2. Indoor Climbing 

About New Verve

We inspire effective teamwork

We design and implement bespoke Atlassian solutions to meet your specific needs

Based in Scotland!



Gold
Solution Partner



About me

synergy learning

From: Ireland

Head of Operations

Synergy Learning ~9.5 years

Hobbies

- I've heard of them!
- Two Children = No free time!
 - Daniel - 2 years
 - Amy - 6 months

Who are Synergy Learning?

synergy learning

Full Service Provider of Learning Technology



Hosting



Support



Training & Consultancy



UX Design



Bespoke Development



Elearning Content

-  Partner - 2005
-  Platinum Partner - 2011

Companies we work with

synergy learning



halfords



RYANAIR

WOLSELEY



KIND
HÖRGERÄTE



TRANSPORT
FOR LONDON



mtrcrossrail | 



GOETHE
INSTITUT



Save the Children



CONCERN
worldwide

C/M/S'
Law.Tax

STADT MANNHEIM²

Excel Reporting:

- Export JIRA issues to CSV
- Export Tempo data to CSV
- Bring into Excel for analysis & charts

Custom Dashboards:

- Retrieve data using API's to local database
- Analysis & Charts developed in PHP

Bottleneck in developing new reports

- Excel Reports were advanced
 - Required specific person to develop them
- Sharing files even with GDrive still a pain!

PHP Reports

- Developer required

Requirement: A reporting engine not “static” built to spec reports

Consultancy day / Health Check with New Verve Consulting

- **Recommendation:** EazyBI
- Quick wins / Simple Reports

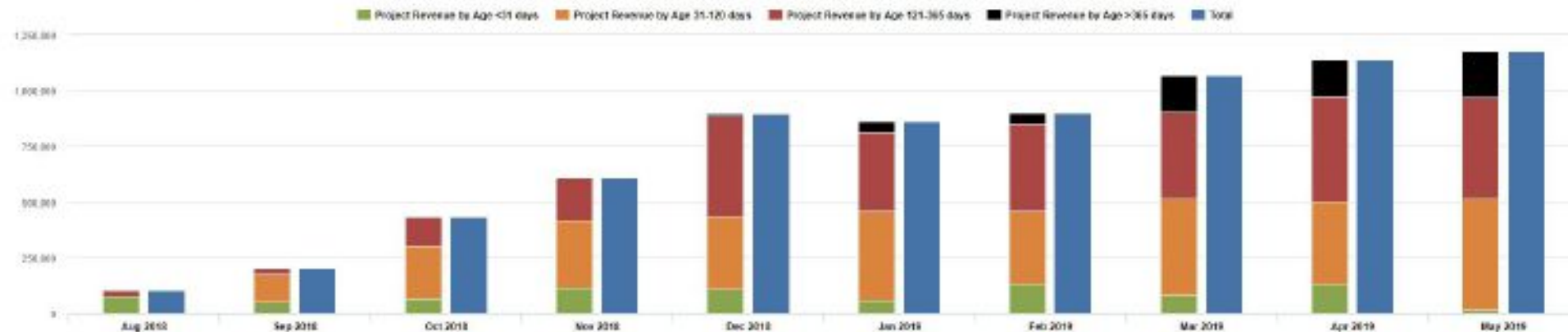
Attended EazyBI Community Day - May 2018

- Fascinating to see what was possible
- Realised quickly that we needed help!

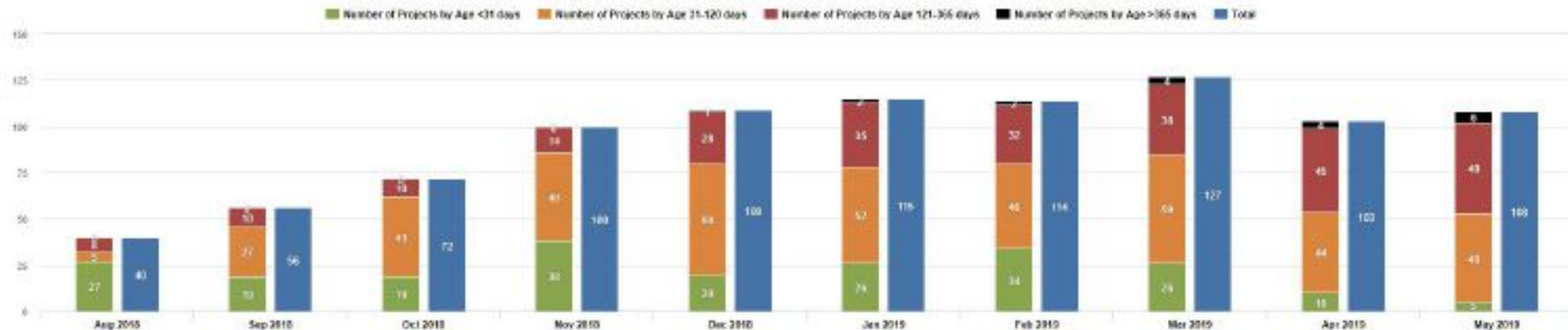
- Consultancy with New Verve to define reports
 - Back to basics - “Pen & Paper” specification!
- Development with New Verve to build

In-Flight / Work in Progress

Aug 2018, Sep 2018, Oct 2018, Nov 2018, Dec 2018, Q1 2019, ...



Aug 2018, Sep 2018, Oct 2018, Nov 2018, Dec 2018, Q1 2019, ...

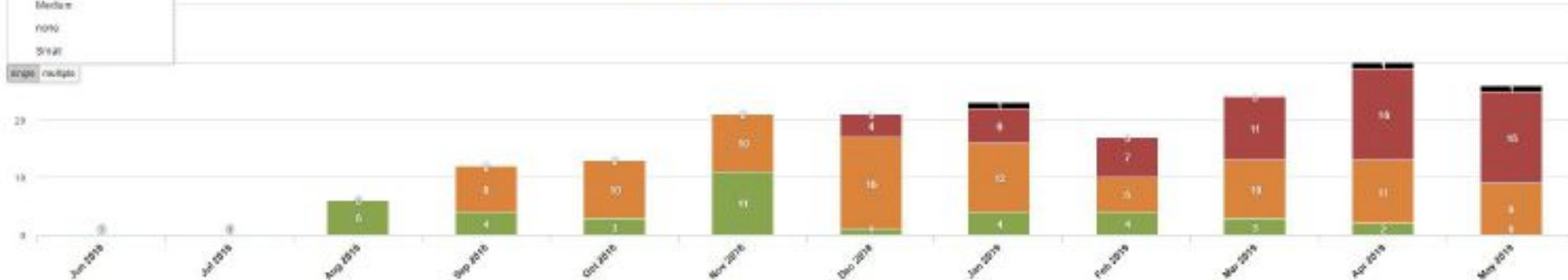


EXCITE. ENGAGE. EMPOWER.

Blocked Projects

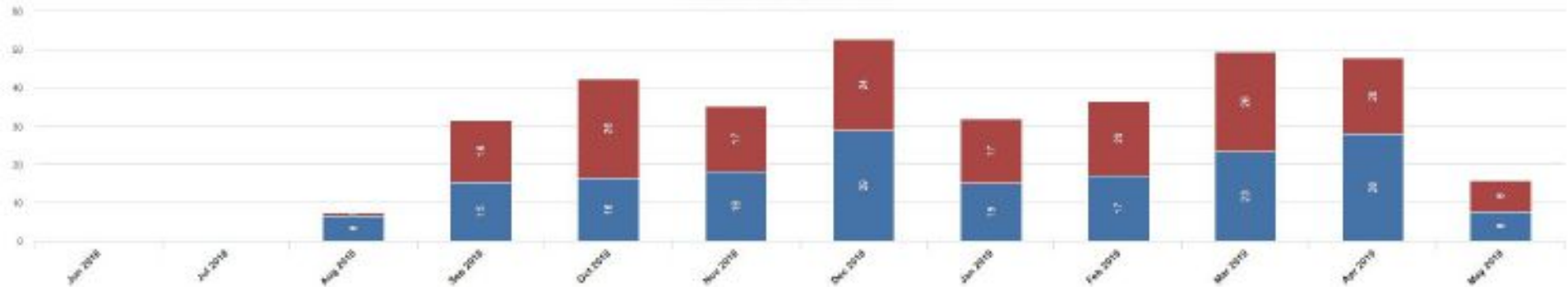
All Profiles Project Sizes ▾
 - All Profiles Project Sizes
 Large
 Medium
 Small
 All
 All

Number of Projects Blocked by Age
 < 31 days 31-120 days 121-365 days > 365 days



Average Blocked

Catherine Murray Mike Campbell



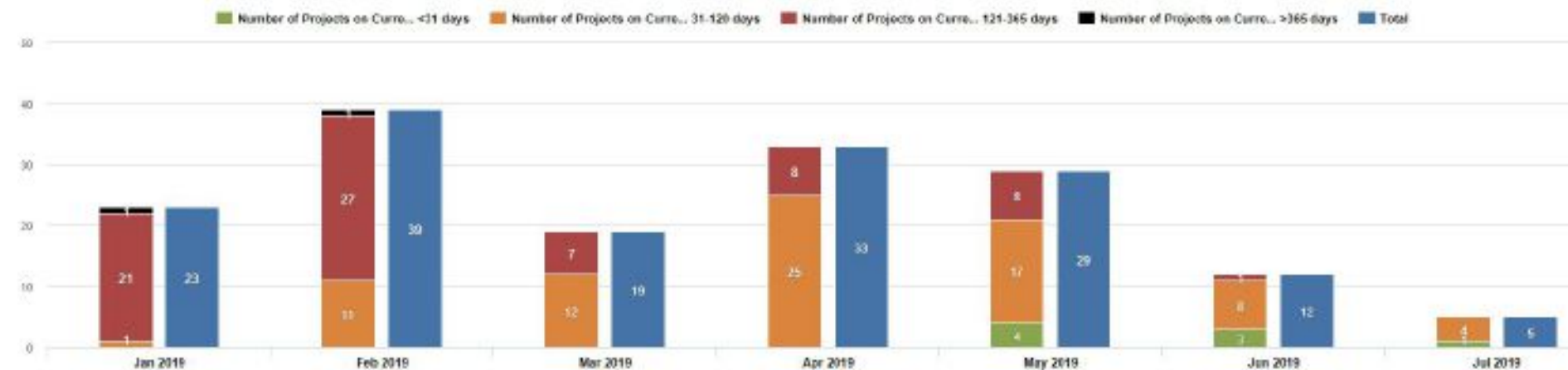
Days moved

CLOSED ▾ Oct 2018, Nov 2018, Dec 2018, Jan 2019, Feb 2019, Mar 2019, Apr 2019



Closeout

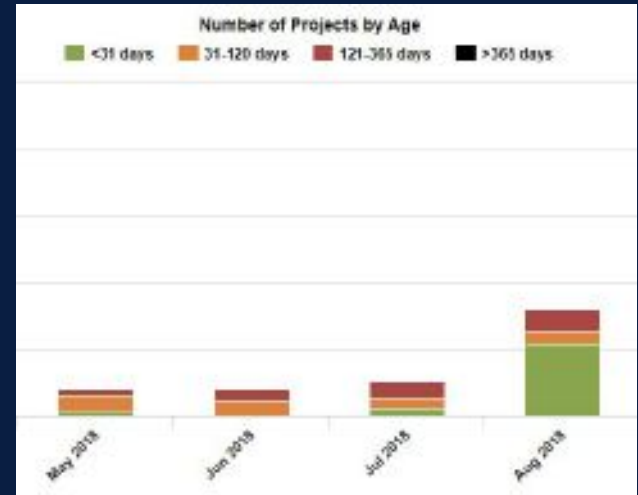
Ordered Set ▾



CLOSED

From

To



Solution Overview



Profields

Project fields like statuses,
revenues etc



ScriptRunner

Extract data and pre-process



eazyBI

Reports

ScriptRunner

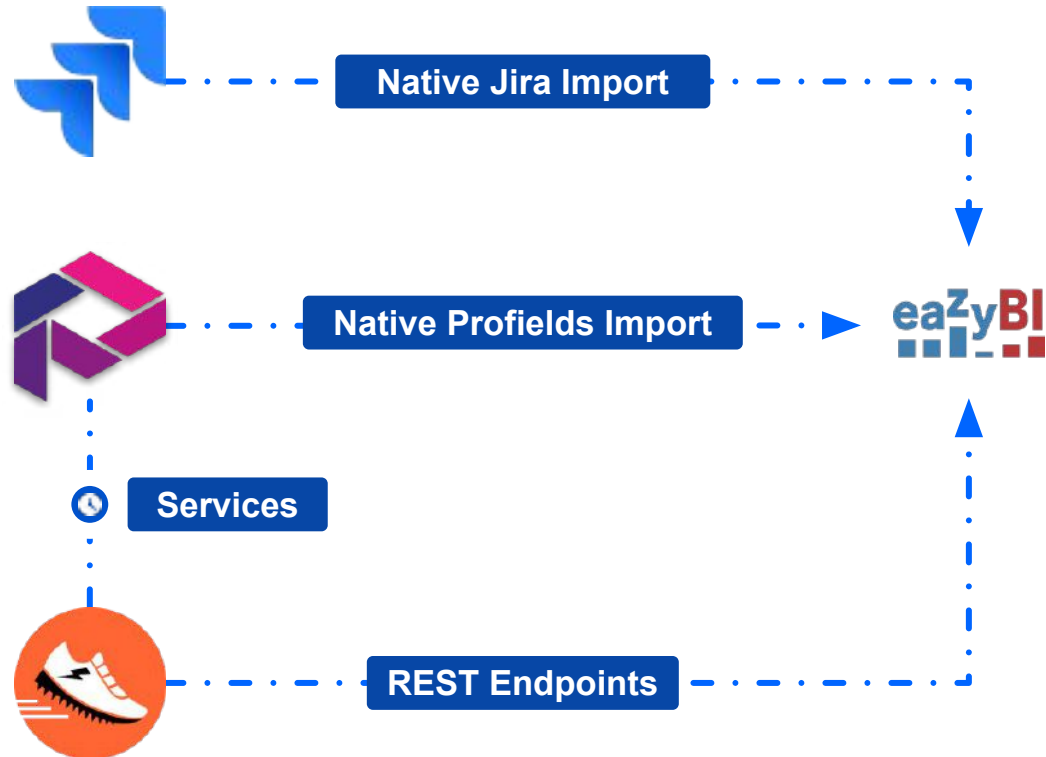
Data Pipeline

Endpoints

Services

Data Pipeline

Get information from Profields to eazyBI



ScriptRunner

Data Pipeline

Endpoints

Services

Endpoints

Endpoint allows us to extract data from Profields and import it into eazyBI, example:

```
GET <Jira URL>/rest/scriptrunner/latest/custom/getStatusHistory
```

```
Response:  [
            {
                "projectName": "Desk",
                "date": "2018-10-08",
                "count": 1
            },
            ...
        ]
```

ScriptRunner



Data Pipeline

Endpoints

Services

Status history

Project	Date	Status
Project X	YYYY-MM-DD	1

Numeric history

Project	Date	Change
Project X	YYYY-MM-DD	+2

Difference history

Project	Date	Change
Project X	YYYY-MM-DD	1

ScriptRunner

Data Pipeline

Endpoints

Services

Services

Pre-process data so that it is easier to use in EazyBI

New dimensions:

Project Age
<31 days
31-120 days
121-365 days
>365 days

Project Size
Small
Medium
Large

eazyBI



10 Data Sources

Native imports and custom endpoints



25 Reports

Internal, status, closeout and issue



8 Dimensions

Including time, measures, assignee, project age and size



69 Members

Sums, counts, averages and linear regressions

Calculated
Member



Chart

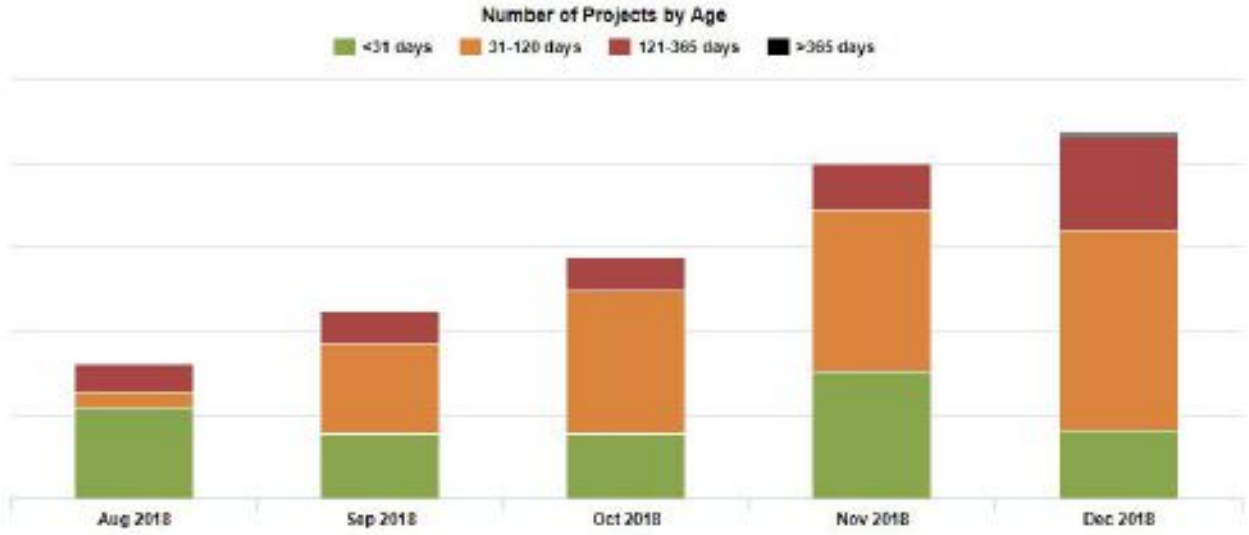
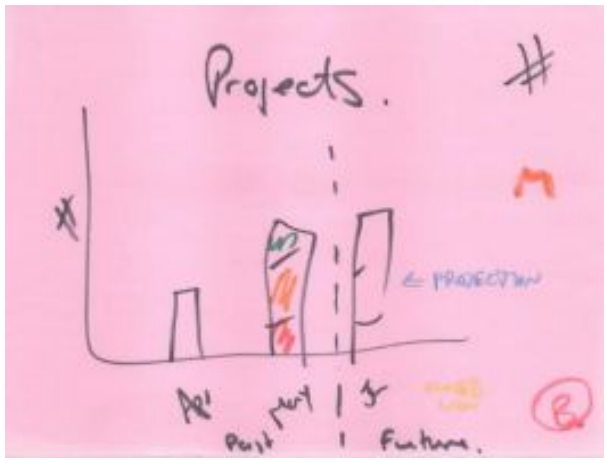
Table

Columns

Filter

And the rest...

The following report provides an illustration of the number of projects per each Project Age category.



Calculated Member

Chart

Table

Columns

Filter

And the rest...

	Number of Projects by Age			
	<31 days	31-120 days	121-365 days	>365 days
+ Jan 2018	1	1	0	0
+ Feb 2018	1	2	0	0
+ Mar 2018	2	4	0	0
+ Apr 2018	2	5	1	0
+ May 2018	2	6	2	0
+ Jun 2018	0	6	4	0
+ Jul 2018	3	4	6	0
+ Aug 2018	27	5	8	0
+ Sep 2018	19	27	10	0
+ Oct 2018	19	43	10	0
+ Nov 2018	38	48	14	0
+ Dec 2018	20	60	28	1

Calculated Member

Chart

Table

Columns

Filter

And the rest...

	Number of Projects by Age			
	<31 days	31-120 days	121-365 days	>365 days
+ Jan 2018	1	1	0	0
+ Feb 2018	1	2	0	0
+ Mar 2018	0	1	0	0

```

-- Change results based on age category
CASE [Profields Project Age Category].CurrentMember.Name

WHEN [Profields Project Age Category].[<31 days].Name THEN
...
WHEN [Profields Project Age Category].[31-120 days].Name THEN
...
WHEN [Profields Project Age Category].[121-365 days].Name THEN
...
WHEN [Profields Project Age Category].[>365 days].Name THEN
...
END
  
```

Calculated Member



Chart

Table

Columns

Filter

And the rest...

	Number of Projects by Age			
	<31 days	31-120 days	121-365 days	>365 days
+Jan 2018	1	1	0	0
+Feb 2018	1	2	0	0

```

WHEN [Profields Project Age Category].[<31 days].Name THEN
Count (
  Filter (
    -- Filter all projects currently selected
    Descendants (
      [Project].CurrentMember, [Project].[Project]
    ),
    ...
  )
)

```

	Number of Projects by Age			
	<31 days	31-120 days	121-365 days	>365 days
+Jan 2018	1	1	0	0
+Feb 2018	1	2	0	0
+Mar 2018	0	1	0	0

Calculated Member

Chart

Table

Columns

Filter

And the rest...

```
Filter(
    -- Filter all projects
    ...,
    -- That are >0 days old in this month
    DateDiffDays(
        [Measures].[Profields Closed Won Date],
        ClosingPeriod([Time].[Day], [Time].CurrentMember).Name
    ) > 0
    AND
    -- That are <31 days old in this month
    ... < 31
    AND
    -- Not closed
    IsEmpty(([Measures].[Closed status],
        [Profields Project Age Category].DefaultMember))
)
```

Calculated Member

Chart

Table

Columns

Filter

And the rest...

Measures grew organically, depending on the report requirements, e.g.:

- Number of Projects by Age
- Number of Projects by Age and Size
- Number of Projects by Age, Size and Status
- Number of Projects by Age, Size and Status (with prediction)

... and then there are Revenue members

So many! But many of them had a similar structure but with different filtering.

Summary



Report User

- Before eazyBI
- Defining requirements
- Reports overview



Solution Developer

- ScriptRunner - data pipeline
- eazyBI configuration
- Calculated member example

Thanks for Listening

Any Questions?