

Re-defining Project and Program Reporting

Going up and down the hierarchy and report on it

Introduction

Atlassian Hero @ iDalko

Implementing EazyBI since 2016

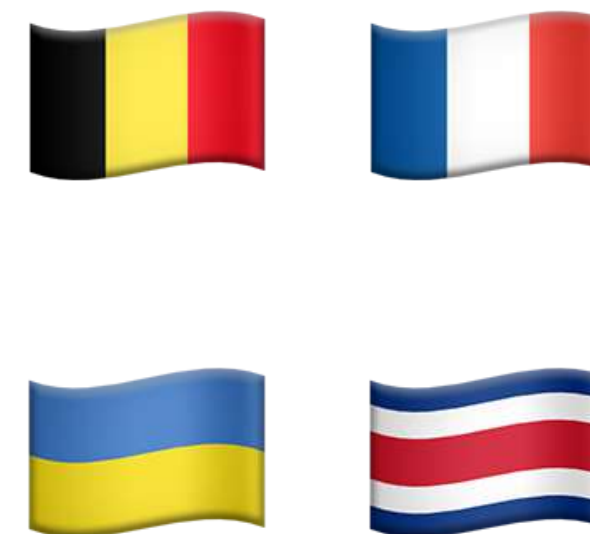
tom.moors@idalko.com



@tommoors



idalko



4
hubs

70+
heroes

2000+
customers

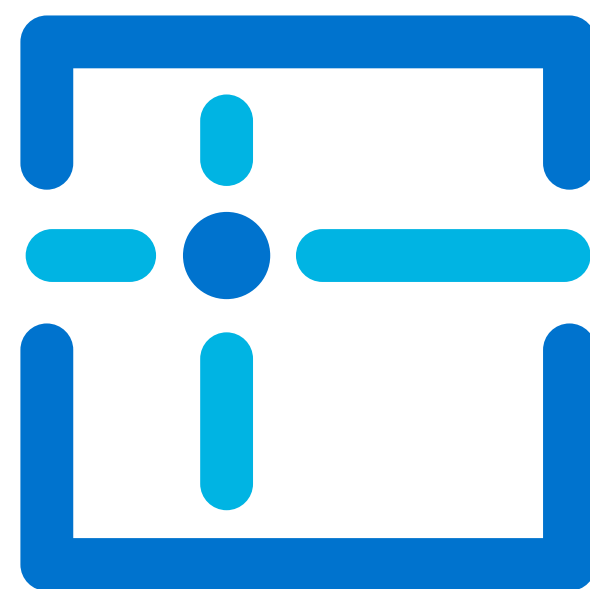


table grid editor



Platinum
Solution Partner



celebrating **a decade**
with heroes!



exalate

Connecting vision to work

Define

The
Optimizer
The Planner

groups of
friends
travelling
together

Sally
&
Gordon

2. PROBLEMS / PAINS

There could be more than one, explore different ones
eg. existing solar solutions for private houses are not considered
a good investment (1).

X
TOO MANY
POINTS FOR
COMPARISONS

TOO MANY
TABS

Too much
irrelevant
info on SL
cards



Facts & Figures

Today, the Ravago group represents over 6,600,000 metric tons of annual polymer sales serving more than 50,000 active customers through 325+ locations across more than 55+ countries worldwide. Ravago's production competence consists of 45+ manufacturing facilities of which 19 recycling and compounding plants in North America, Europe, Asia and Africa with a combined annual capacity of over 775,000 metric tons; 13 production plants in Europe that are offering finished product solutions for the building sector and 7 plants and 6 application laboratories for our Chemicals business. This all would not have been possible without the help of its 7,000 employees.



6,600,000
metric tons annual polymer sales



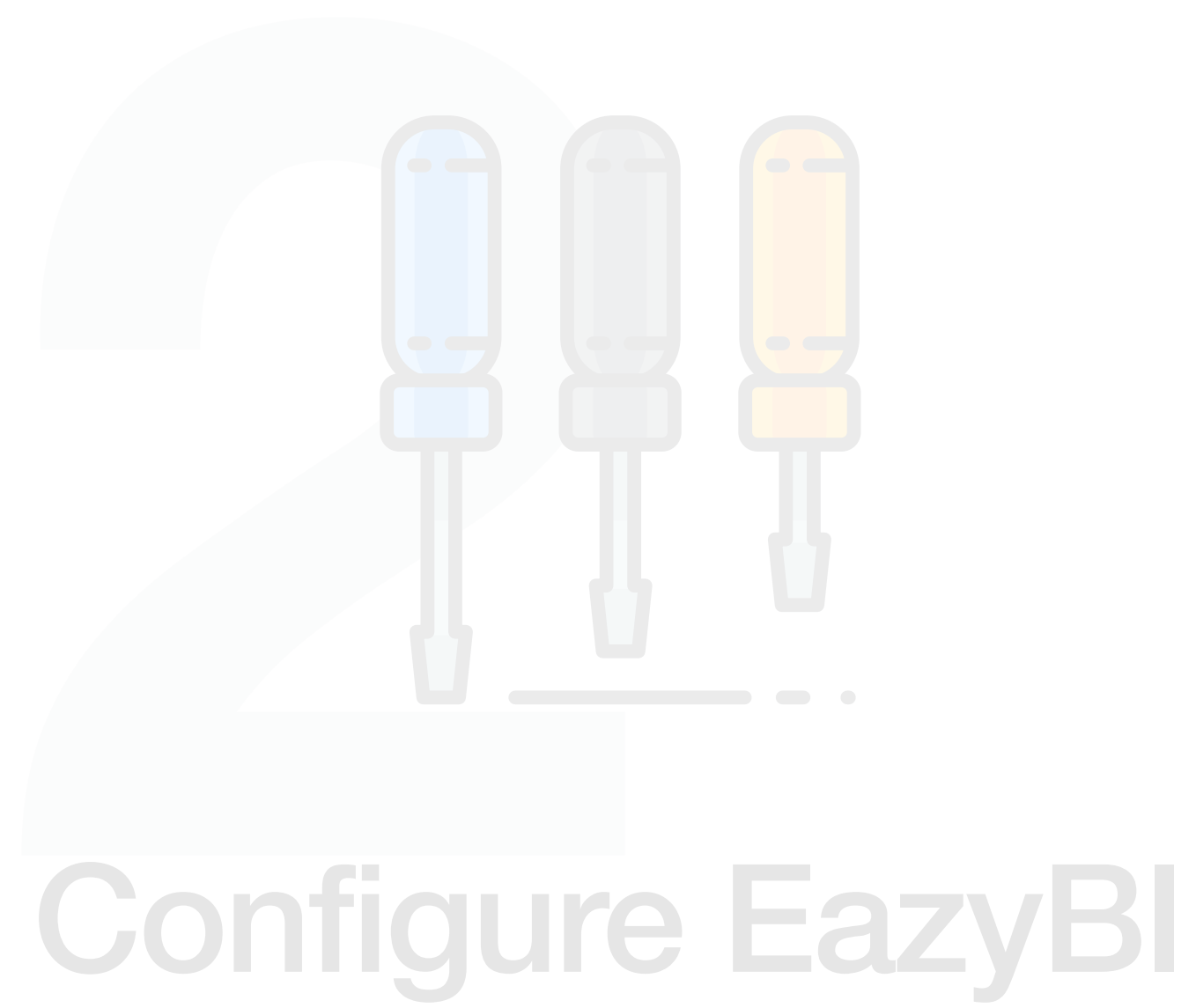
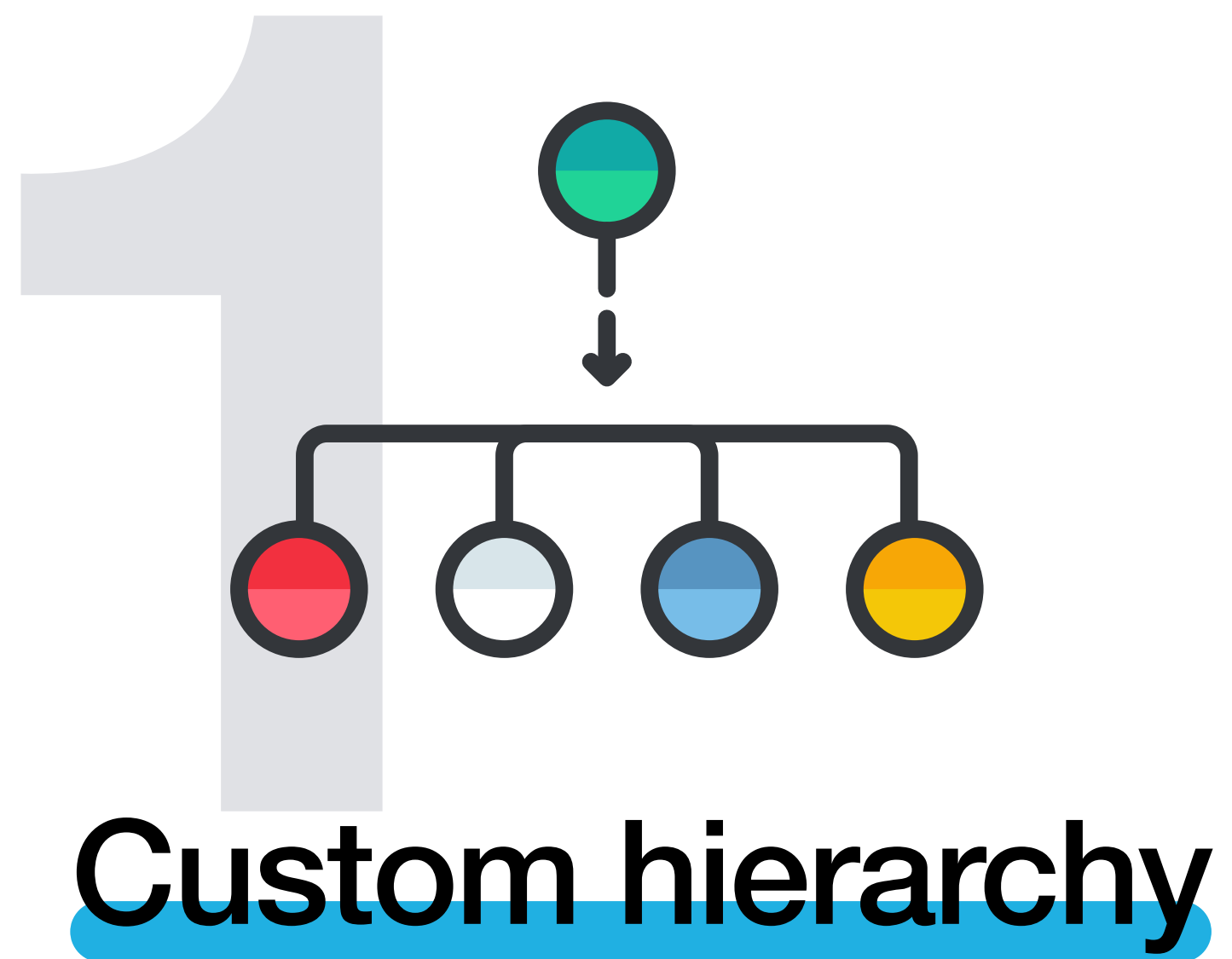
50,000
active buying customers



55
countries worldwide



7,000
employees



Defining hierarchy

Managing a global portfolio

 **Practice**

 **Program**

 **Project**

 **PCR**

 **Epic**


 **Story**

 **Sub-task**

Implementing hierarchy in Jira

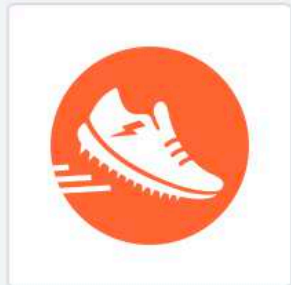
Advanced Roadmaps hierarchy levels

In plans, your project items are grouped into hierarchy levels. You can change the names of these levels and structure the hierarchy to your needs. See our documentation to find out [how to expose these levels in Jira](#).

#	Level Name		Jira Issue Types	Actions
	Epic	←	 Epic	
	Story	←	All other standard issue types	
	Sub-Task	←	All sub-task issue types	
+ Create Level				

 Changes to the hierarchy configuration will apply to all existing plans.

Save changes



★★★★★ 584
28,400

ScriptRunner for Jira

by [Adaptavist](#)
for Jira Cloud, Jira Server 8.0.0 - 8.16.1, Jira Data Center 8.0.0 - 8.16.1 and [more versions](#)

SUPPORTED JIRA SERVICE MANAGEMENT

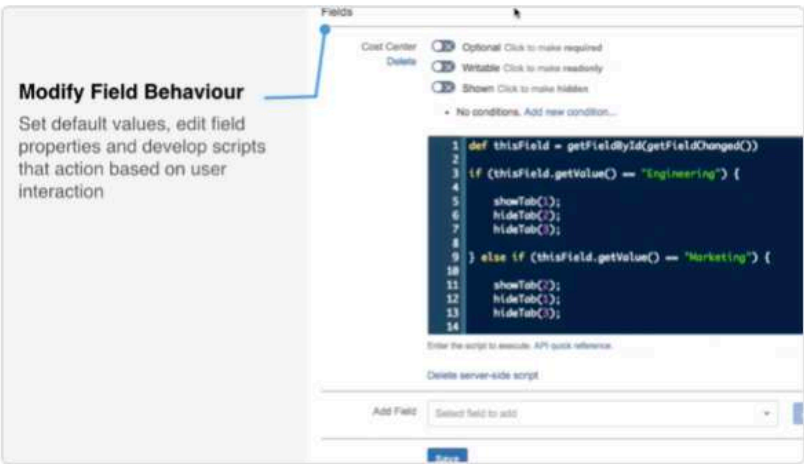
Try it free

Buy it now

Overview Reviews Pricing Support Versions Installation

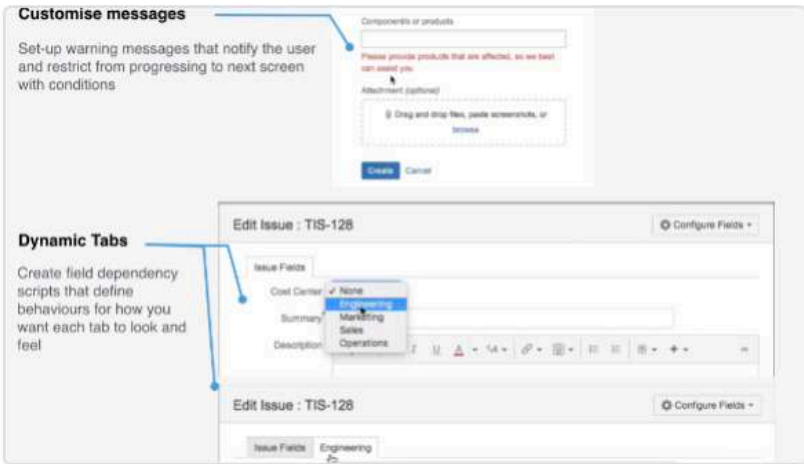
Server

The Leading Automation and Customization App: Automate Workflows & Issues, Extend Jira and Improve UX with Groovy Scripts and JQL



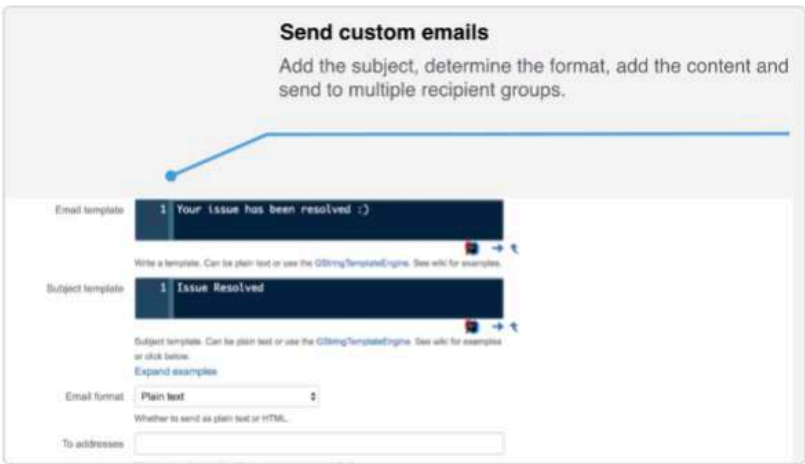
Automate Jira using built-in or custom scripts

Get started with [ready-made scripts](#) or use the [powerful script console](#) to build your own. Build Scripted Fields to show calculated data or [use Behaviours](#) to completely customise how you create and update issues.



Customise your Jira interface and JQL extensions

Modify your fields, forms and issues to look, feel and behave how you want. Design enhanced search queries [using JQL functions](#) and use it to automate tasks, drive smarter reporting, and intelligent backlogs and boards.



Deep integrations with Jira and 3rd party tools

Complete Jira Service Management compatibility; [automate issue management](#) to meet SLAs faster and optimise workflows. [Build multi-lingual support with Confluence](#) and control your Jira Service Management in one place.


Create a new Custom Field

Script Field: Issue picker

Script Fields > Create

Create Script Field

Extend the information shown for an issue using script fields. Display calculated values in custom fields according to the results of ScriptRunner scripts.

 More information

Search ScriptRunner functionality

Script Fields >

Project		<div>Custom Script Field</div> <div>Create your own custom scripted field.</div> <div>FIELDS</div>
Issue		
Fields		<div>Date of First Transition</div> <div>Shows the date when the field first transitioned into a required state.</div> <div>FIELDSWORKFLOW</div>
User		
Reporting		<div>Issue(s) picker</div> <div>Select another issue, optionally constrained by a JQL query</div> <div>ISSUEFIELDS</div>
System		
Workflow		<div>No. of Times In Status</div> <div>FIELDSWORKFLOW</div>

Create a Script Field

Issue picker with name Parent

Browse

Console

Built in scripts

Listeners

Fields

REST Endpoints


Fragments

Escalation Services

Resources

JQL Functions

Script Editor



Issue(s) picker

?

Select another issue, optionally constrained by a JQL query

Field Name

Parent

The name of the custom field that you are creating

Field Description

Defines the parent in the hierarchy of work

The description of the custom field that you are creating

Field Note

A note attached to the field

JQL

(project = portfolio OR issueType in (PCR))

JQL that the issue picker will select from. Leave blank to allow any issue
You can modify this with Behaviours using `field.setConfigParam('currentJql', '<your jql query>')`

Multiple

☐

Check for a multi-select, unchecked for a single select. **This cannot be edited after creation.**

Placeholder text

Select issue(s)

Placeholder text to show for empty inputs. Leave blank for the default

Preview Issue Key

POR-77

Issue key for preview. Only used for the preview function below.

Preview

Update

Cancel

Issue picker: limit the picklist

Behaviours to the rescue

Edit Behaviour: POR: Program

Edit your behaviour here. When finished return to [mappings](#).

Mappings

All projects ( Program)

Save

Discard

Behaviour Settings

Use Validator Plugin ☐

This will check your workflow for uses of the *Fields Required* validator in Jira Suite Utilities, and mark these fields as required.

Guide workflow

None

Use this setting to allow the tool to show you actions and state names when using *Conditions*.

Initialiser

Delete

```
1 def field = getFieldByName("Parent")
2 field.setConfigParam('currentJql', 'issuetype = Practice')
```

SCRIPT

FILE



Enter the script to execute. [API quick reference](#).

Add Field

Select field to add

▼

Add

Save

Issue picker: limit the picklist

Behaviours to the rescue

 **Practice**

```
1 def field = getFieldByName("Parent")
2 field.setConfigParam('currentJql', 'resolution IS NOT EMPTY and resolution IS EMPTY')
```

 **Program**

```
1 def field = getFieldByName("Parent")
2 field.setConfigParam('currentJql', 'issuetype = Practice')
```

 **Project**

```
1 def field = getFieldByName("Parent")
2 field.setConfigParam('currentJql', 'issuetype = Program')
```

 **PCR**

```
1 def field = getFieldByName("Parent")
2 field.setConfigParam('currentJql', 'issuetype = Project')
```

 **Epic**


```
1 def field = getFieldByName("Parent")
2 field.setConfigParam('currentJql', 'issuetype = PCR')
```


JQL without results


Issue picker: limit the picklist


Behaviours to the rescue


 Project


Parent  POR-330 Sales Archive ✕ ▼


 POR-196


 POR-245


 POR-231

 POR-211


 POR-217

 POR-215


 POR-198


 POR-206


 PCR


Parent  POR-384 LMS Archive ✕ ▼


Showing 10 of 194 matching issues


 POR-254


 POR-255

 POR-251

 POR-248

 POR-238


 POR-237


 POR-246

 Program

Issue links for visualizing relations

Something about parent/child issues

Portfolio / POR-384

Edit


Assign

More ▾


Admin ▾

Details

Type:

Project


Priority:


Minor (P4)

Component/s:None

Labels:None

Parent:

POR-330 Sales Archive

OPEN

Status:


NEW

Resolution:Unresolved

Description


Click to add description


Attachments

Drop files to attach, or [browse](#).


Issue Links


child of

POR-330 Sales Archive

OPEN

parent of

RAV-1259Organization

CLOSED

Script Runner: listener for keeping issue link in sync

Automatic housecleaning for the win!

Browse Console Built in scripts Listeners Fields REST Endpoints Fragments Escalation Services Resources JQL Functions Script Editor ⚙

Custom listener

Write your own groovy class as a custom listener.

Note Update Parent field and Parent/Child Issue link

An optional note, used only for your reference.

Project(s) All projects x

Filter on events for these projects. Some events, eg **User** events, are not associated with a project.

Events

Issue Created x Issue Updated x
IssueLinkCreatedEvent x IssueLinkDeletedEvent x

Which events to fire on.

adapt when the Parent field has a (new) value

Remove parent/child issue links that are created manually

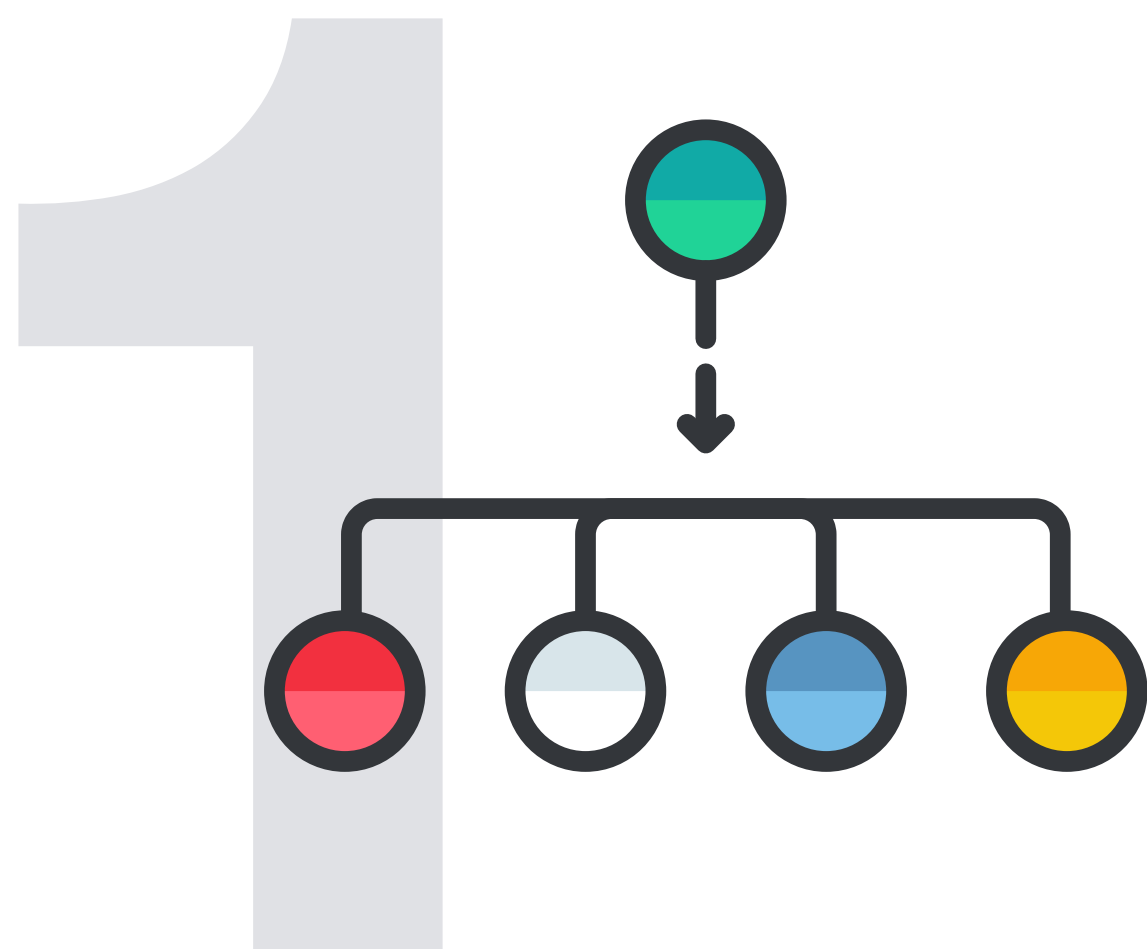
Inline script

```
104
105 public void sanitizeLinkedIssuesBasedOnParentIssueField(Issue issueToSanitize) {
106     if (issueToSanitize != null) {
107         log.debug("Issue to sanitize: " + issueToSanitize.getKey())
108         String parentIssueKey = getParentIssueKeyFromIssue(issueToSanitize)
109         log.debug("Parent key: " + parentIssueKey)
110         updateLinkedIssuesBasedOnParentIssueKey(null, issueToSanitize, parentIssueKey)
111     }
112 }
113
114 public void updateLinkedIssuesBasedOnParentIssueKey(ApplicationUser user, Issue issue, String parentIssueKey) {
115     Issue parentIssue = ComponentAccessor.getIssueManager().getIssueByKeyIgnoreCase(parentIssueKey)
116     if (parentIssue != null) {
117         List<IssueLink> allInIssueLink = ComponentAccessor.getIssueLinkManager().getInwardLinks(issue.getId())
118         boolean linkDoesNotExist = true
119     }
```

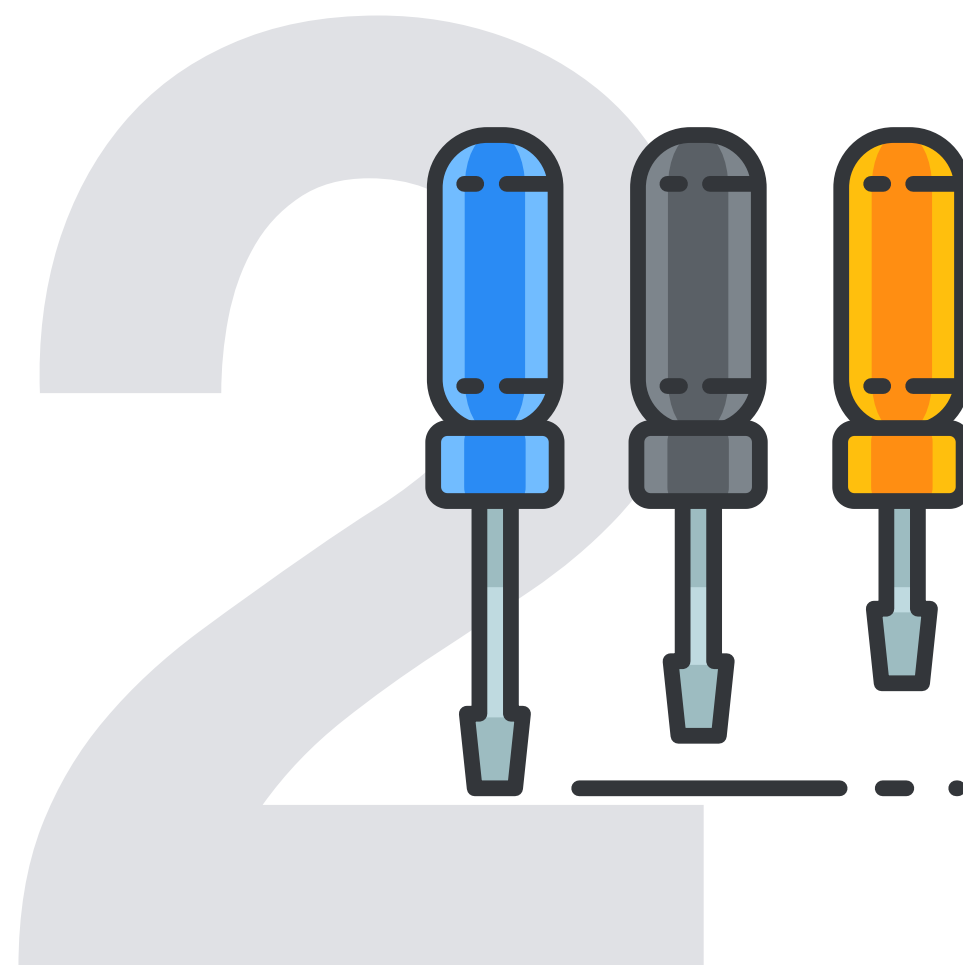
Enter your script here

Script file Start typing to search for files...

Path to the script accessible on the server - or fully-qualified class name class in the form com.acme.MyListener



Custom hierarchy




Configure EazyBI



Let's build!

Adding our hierarchy in EazyBI

Let's open up the hood

 Home System Admin Jira

Select account ? ⚙️ 👤

Settings

All users

All accounts

System events

Background jobs

Troubleshooting

eazyBI settings

General License Additional Advanced settings

Advanced settings

Please see the [advanced settings help page](#).

```
10 inward_link = "child of"
11 update_from_issue_key="customfield_program"
12
13 [jira.customfield_program]
14 name = "Program"
15 inward_link = "child of"
16 issue_type = "Program"
17 update_from_issue_key = "customfield_rav_project"
18
19 [jira.customfield_rav_project]
20 name = "Ravago Project"
21 inward_link = "child of"
22 issue_type = "Project"
23 update_from_issue_key = "customfield_pcr"
24
25 [jira.customfield_pcr]
26 name = "PCR/Activity"
27 inward_link = "child of"
28 issue_type = ["PCR","Activity"]
29 update_from_issue_key = "epic_key"
30
31 [[jira.issue_hierarchies]]
32 name = "Ravago Portfolio"
33 all_member_name = "All Issues by practice"
34 levels = [
35   {name="Practice",key_column="customfield_practice",issue_type="Practice"},
36   {name="Program",key_column="customfield_program",issue_type="Program"},
37   {name="Ravago Project",key_column="customfield_rav_project",issue_type="Project"},
38   {name="PCR",key_column="customfield_pcr",issue_type=["PCR","Activity"]},
39   {name="Epic",key_column="epic_key",issue_type="Epic"},
40   {name="Parent",key_column="epic_parent_key"},
41   {name="Sub-task",key_column="subtask_key"}
42 ]
```

Update advanced settings

Adding a custom issue hierarchy in EazyBI

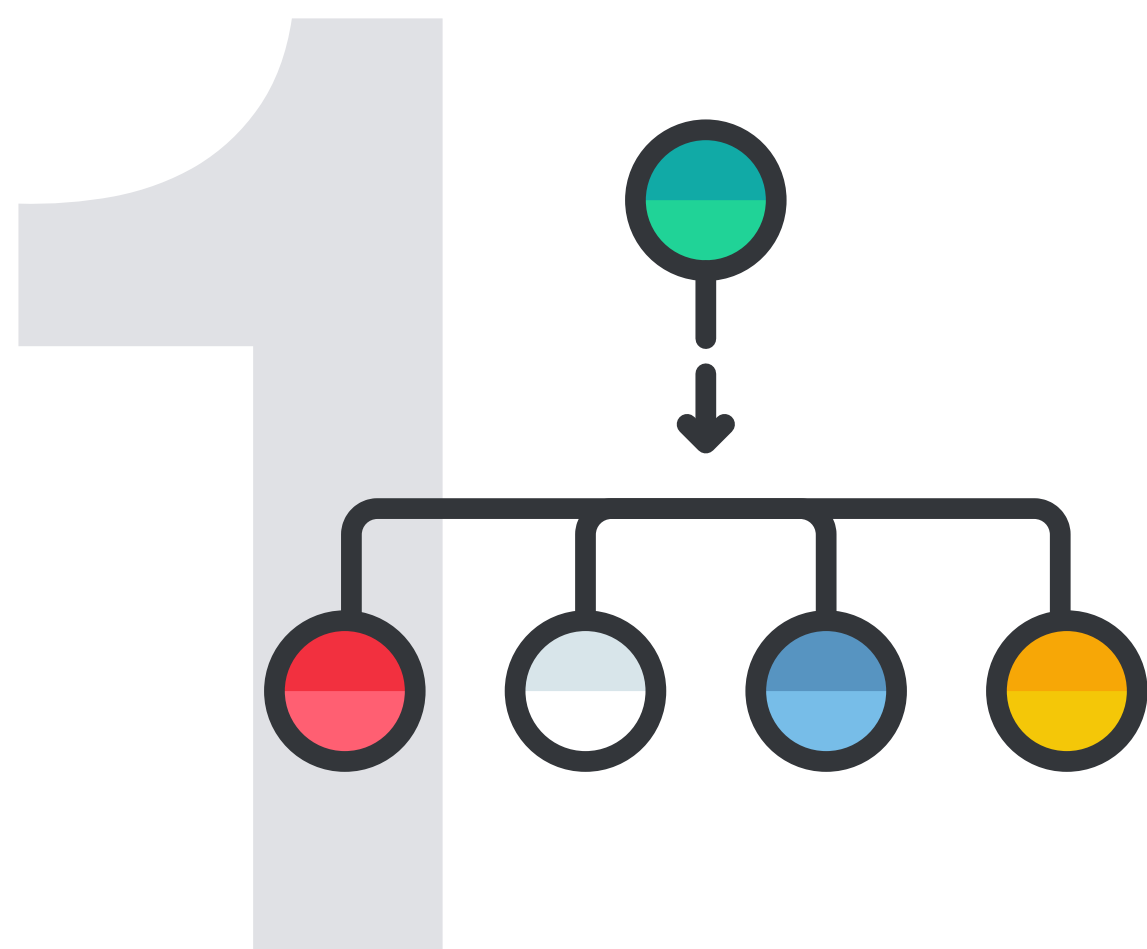
Set up the levels in the hierarchy

```
1 [jira.customfield_practice]
2 name = "Practice"
3 issue_type = "Practice"
4 inward_link = "child of"
5 update_from_issue_key="customfield_program"
6
7 [jira.customfield_program]
8 name = "Program"
9 inward_link = "child of"
10 issue_type = "Program"
11 update_from_issue_key = "customfield_rav_project"
12
13 [jira.customfield_rav_project]
14 name = "Ravago Project"
15 inward_link = "child of"
16 issue_type = "Project"
17 update_from_issue_key = "customfield_pcr"
18
19 [jira.customfield_pcr]
20 name = "PCR/Activity"
21 inward_link = "child of"
22 issue_type = ["PCR","Activity"]
23 update_from_issue_key = "epic_key"
```

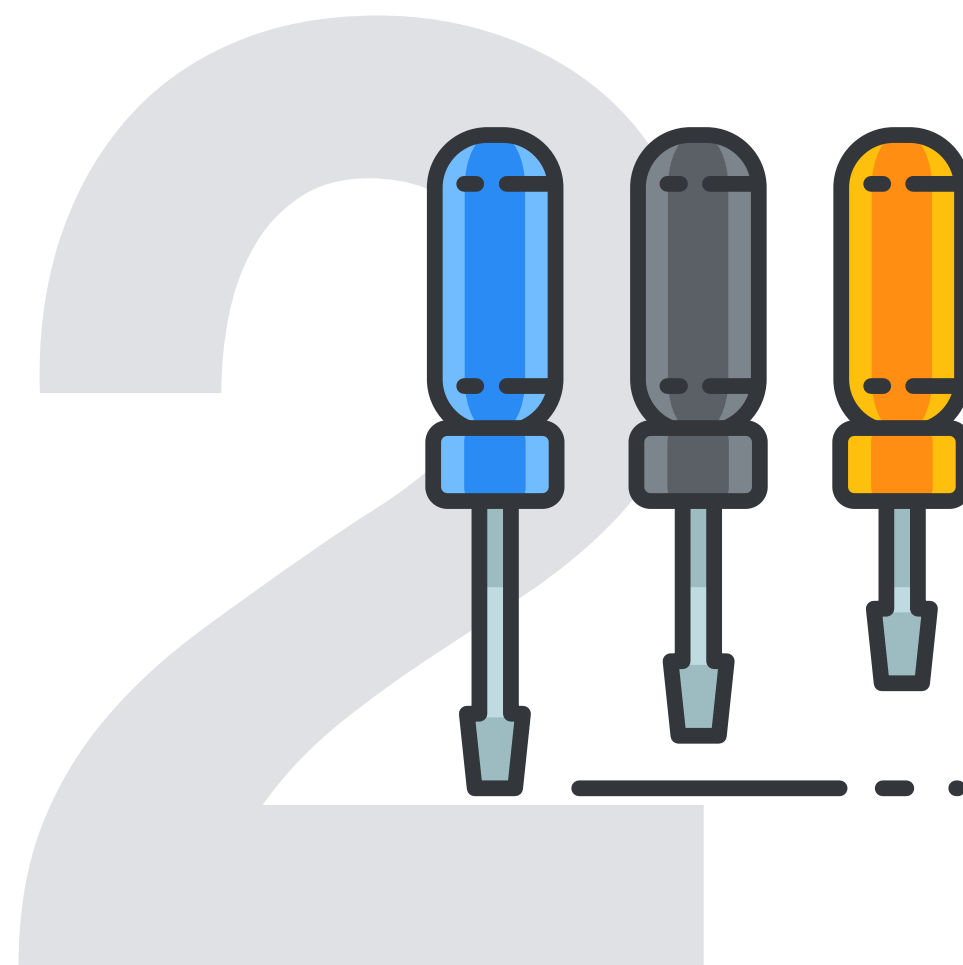

Adding a custom issue hierarchy in EazyBI

Define the hierarchy

```
[[jira.issue_hierarchies]]
name = "Ravago Portfolio"
all_member_name = "All Issues by practice"
levels = [
  {name="Practice",key_column="customfield_practice",issue_type="Practice"},
  {name="Program",key_column="customfield_program",issue_type="Program"},
  {name="Ravago Project",key_column="customfield_rav_project",issue_type="Project"},
  {name="PCR",key_column="customfield_pcr",issue_type=["PCR","Activity"]},
  {name="Epic",key_column="epic_key",issue_type="Epic"},
  {name="Parent",key_column="epic_parent_key"},
  {name="Sub-task",key_column="subtask_key"}
]
```



Custom hierarchy



Configure EazyBI



Let's build!

Building a new report

Show available dimensions

Pages

Drag here if needed

Columns

Measures

Rows

Nonempty

Issue

Select individual members

All hierarchy level members

Select all members at level

Project 55Issue 20579

Sub-task

Project 55Parent 18441

Sub-task 20579

Epic

Project 55Epic 2015

Parent 18508Sub-task 20633

Ravago Portfolio

Practice 11Program 50

Ravago Project 222PCR 1860

Epic 3144Parent 18458

Sub-task 20579

Drill into or expand

TableBarLinePieScatterTimelineMapGanttGauge


Total

Freeze header

	Issues created	Issues resolved	Original estimated hours
+ All Issues	20,578	15,387	407,784.56

Building a new report

Measures limited to specific period







[Home](#)[Source Data](#)[Analyze](#)[Dashboards](#)[Jira](#)


IT Overview


?


⚙




 Issues >  project and PCR reporting >  PROD Project and PCR reporting - bud act

 Save

 New

 Open



[Show available dimensions](#)

Pages

► **Issue**

Rows

Nonempty

► **Issue**

Columns

► Measures

Table

Bar

Line

Pie

Scatter

Timeline

Map

Gantt

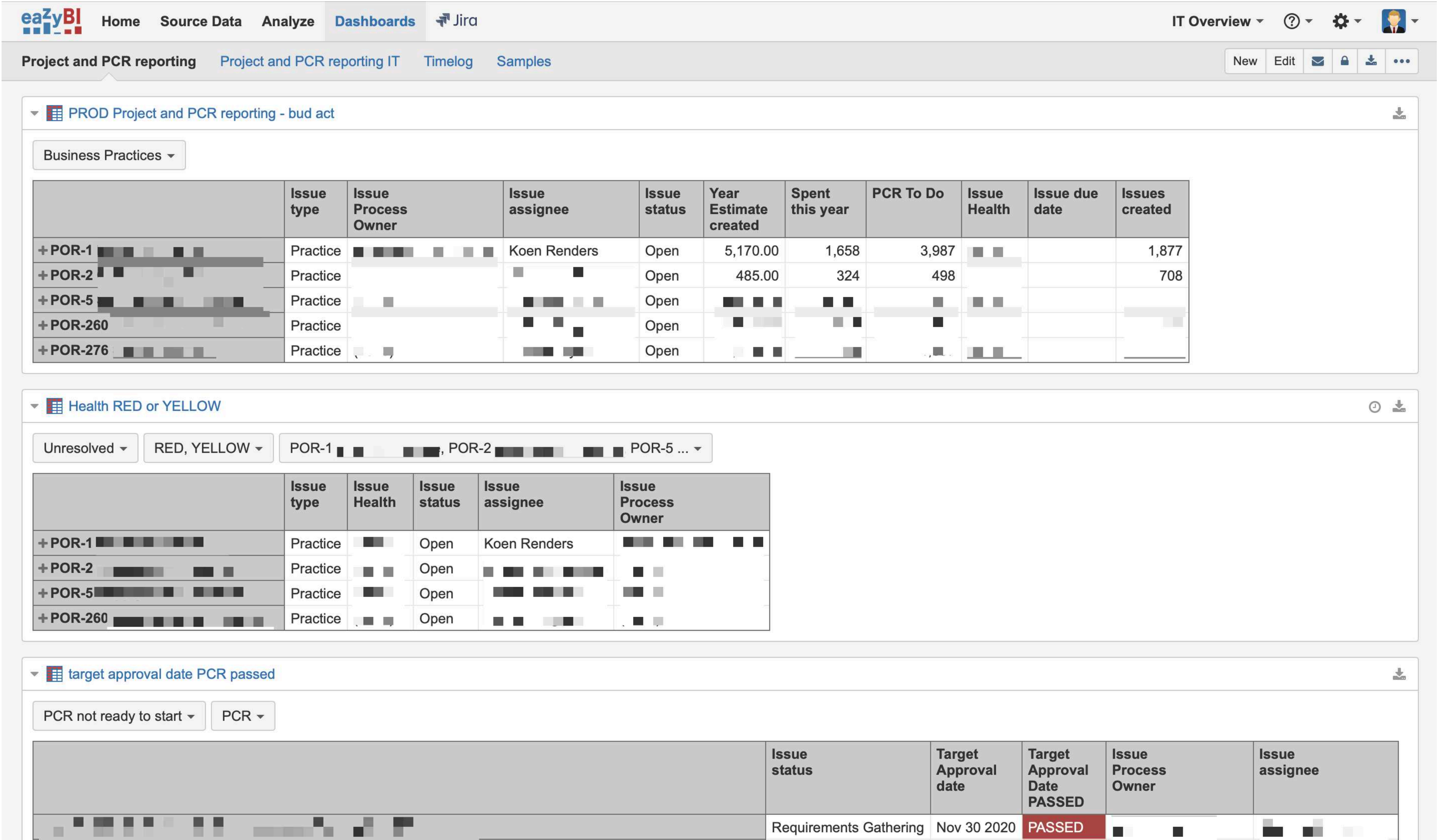
Gauge

Business Practices ▼

[illegible]

Building a new dashboard

Dive into items that need attention



Restricting data access across the hierarchy

Provide access to data as-needed

eaZyBI

HomeSource DataAnalyzeDashboardsJira

IT Overview ? ⚙️ 👤

Account usersData access roles

Role name	Cubes	Folders	Dashboards	Dimensions	Actions
BOPO	Issues	project and PCR reporting	Project and PCR reporting	Issue.Ravago Portfolio	<div>EditDelete</div>

Use [data access roles](#) to restrict access to cubes, report folders, dashboards, as well as limit access to a subset of dimension members. Assign defined data access roles to users in the **Account users** tab, to report folders in the **Analyze** tab, and to dashboards in the **Dashboards** tab.

Add new data access role

eaZyBI

HomeSource DataAnalyzeDashboardsJira

IT Overview ? ⚙️ 👤

Update data access role

Role name *BOPO

Restricted cubes

Issues ✕

Restrict access only to selected cubes. If none is selected then no cube restrictions will be added by this role.

Dimension restrictions

Limit access to a subset of dimension members. Please read [data access roles documentation](#) for more detailed description and examples.

Dimension	Hierarchy	Bottom level	Members	Actions
Issue	Ravago Portfolio	PCR	All Issues by practice	<div>Remove</div>
				<div>Add</div>

Update

 or [back](#)

Restricting data access across the hierarchy

Provide access to data as-needed



Unrestricted access

Project and PCR reporting

POR-66

Search in members list

- POR-2
- + POR-65
- POR-92
- POR-94
- GAUSS-5635
- GAUSS-5713
- RAV-1294**
- + ON-114

single multiple

Issue	Issue	Issue	Issue	Issue
-------	-------	-------	-------	-------

Spent this year



User with BOPO data access role

Project and PCR reporting

POR-245

Search in members list

- + POR-65
- POR-92
- POR-94
- GAUSS-5635**
- ON-114
- RAV-730
- RAV-1234
- RAV-1252

single multiple

Issue	Issue	Issue	Issue	Issue
-------	-------	-------	-------	-------

ear estimate created

time re

MDX Formulas & data access roles

Tuples, tuples, tuples!

```
case
when
  ([Issue.Ravago Portfolio].CurrentHierarchyMember.level.Name = "PCR" OR [Issue.Ravago
Portfolio].CurrentHierarchyMember.level.Name = "Activity")
then
  CoalesceEmpty((Sum([Issue.Ravago Portfolio].CurrentHierarchyMember.Children,
    [Measures].[Hours spent with sub-tasks])
  +
  nonzero(
    [Measures].[Hours spent with sub-tasks],
    [Issue Type].[PCR/Activity]
  ))) / 8,0)
end
```

MDX Formulas & data access roles

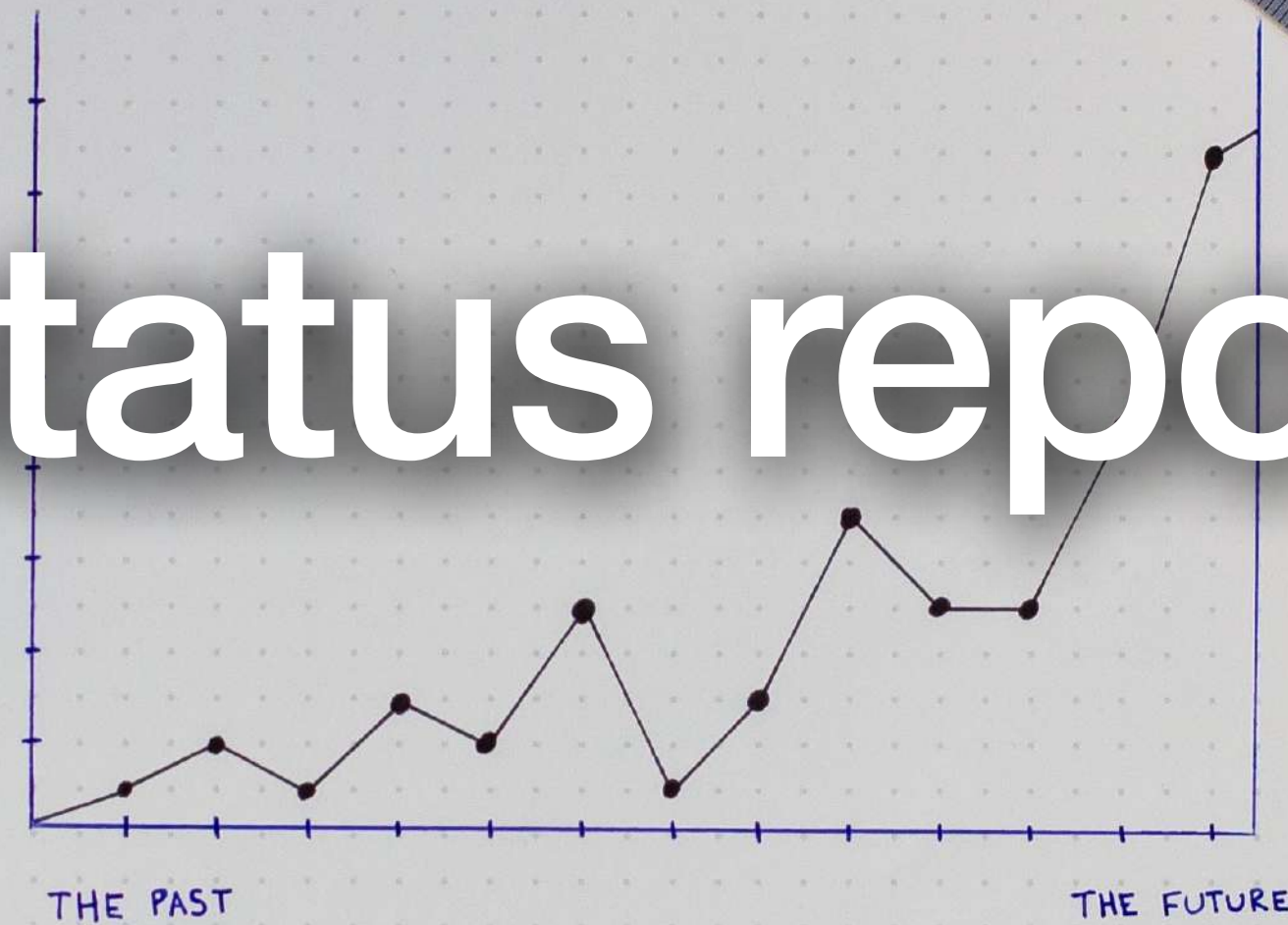
Tuples, tuples, tuples!

```
([Measures].[Hours spent with sub-tasks],  
[Issue Type].[All types below PCR]) / 8
```

[Issue Type].[] =

```
1 Aggregate(Except(  
2     [Issue Type].[Issue Type].Members,  
3     {  
4         [Issue Type].[Practice],  
5         [Issue Type].[Program],  
6         [Issue Type].[Project]  
7     }  
8 )  
9 )
```


Improving status reports





Atlassian Confluence

@Confluence

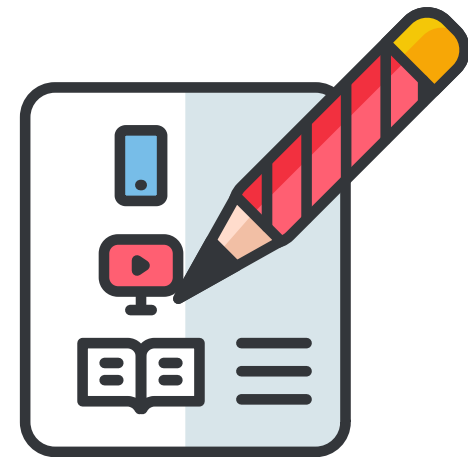


#ProjectManagers — on a scale of 1-10, how much can you relate?



9:34 p.m. · 4 mei 2021 · Sprout Social

Project Manager reporting pains



Status reporting templates are limited



Every pm uses it's own ad-hoc practices



Preserving the snapshot at the time of prep takes time



Sharing reports internally/externally is hard

**EasyBI has many ways to
consume & share reports**



Add gadget

3

Priority - Blocker

Add a gadget

CATEGORIES

- All 2
- Charts 0
- Jira 2
- Jira Service Management 0
- Wallboard 0



easyBI dashboard

By easyBI • Local

Embed selected easyBI dashboard.

Add gadget



easyBI report

By easyBI • Local

Embed selected easyBI report.

Add gadget

Close

rations

Chart: IT Operations

20.0%

0.0%

30th Apr

1st May

2nd May

3rd May

4th May

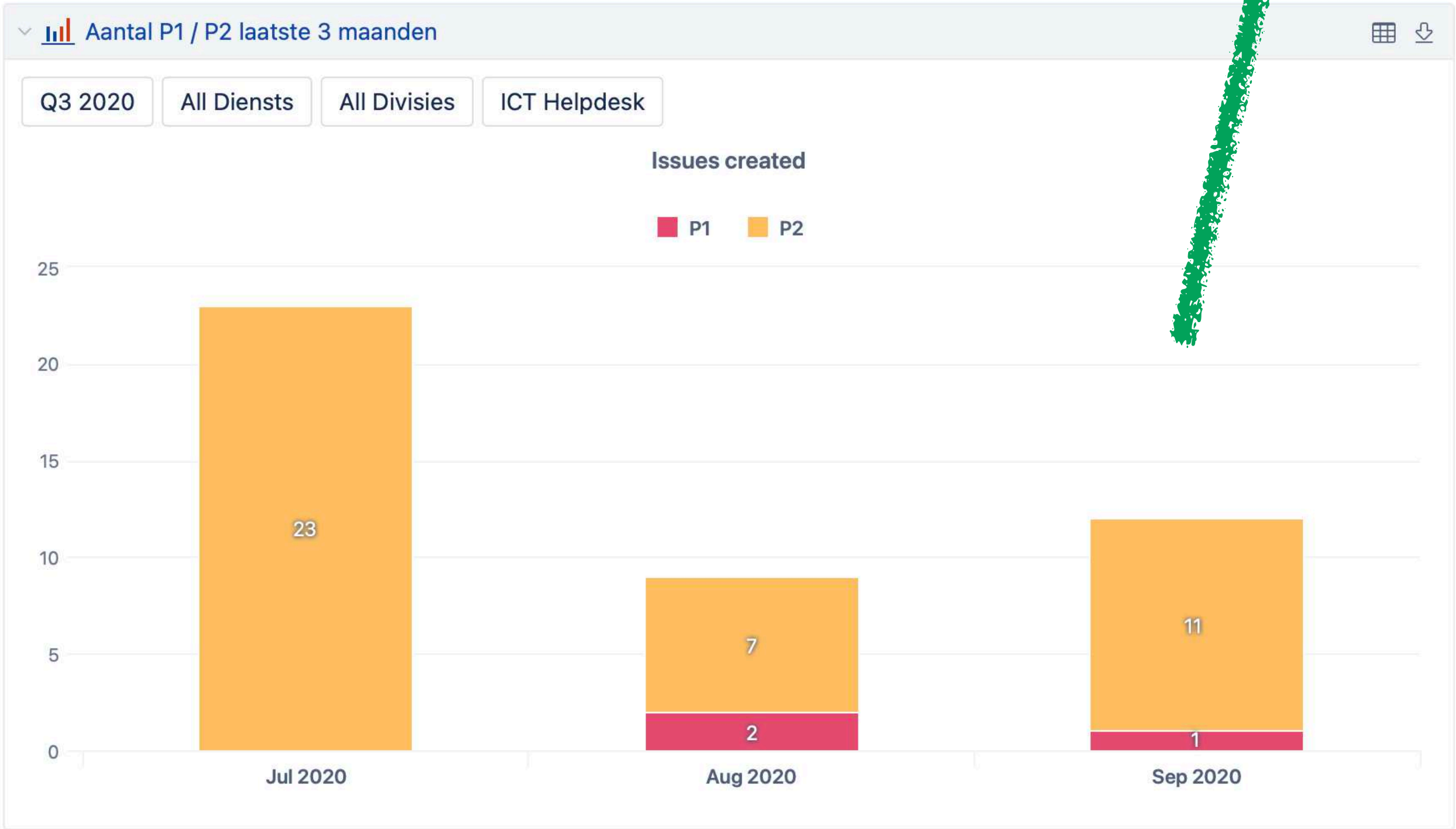
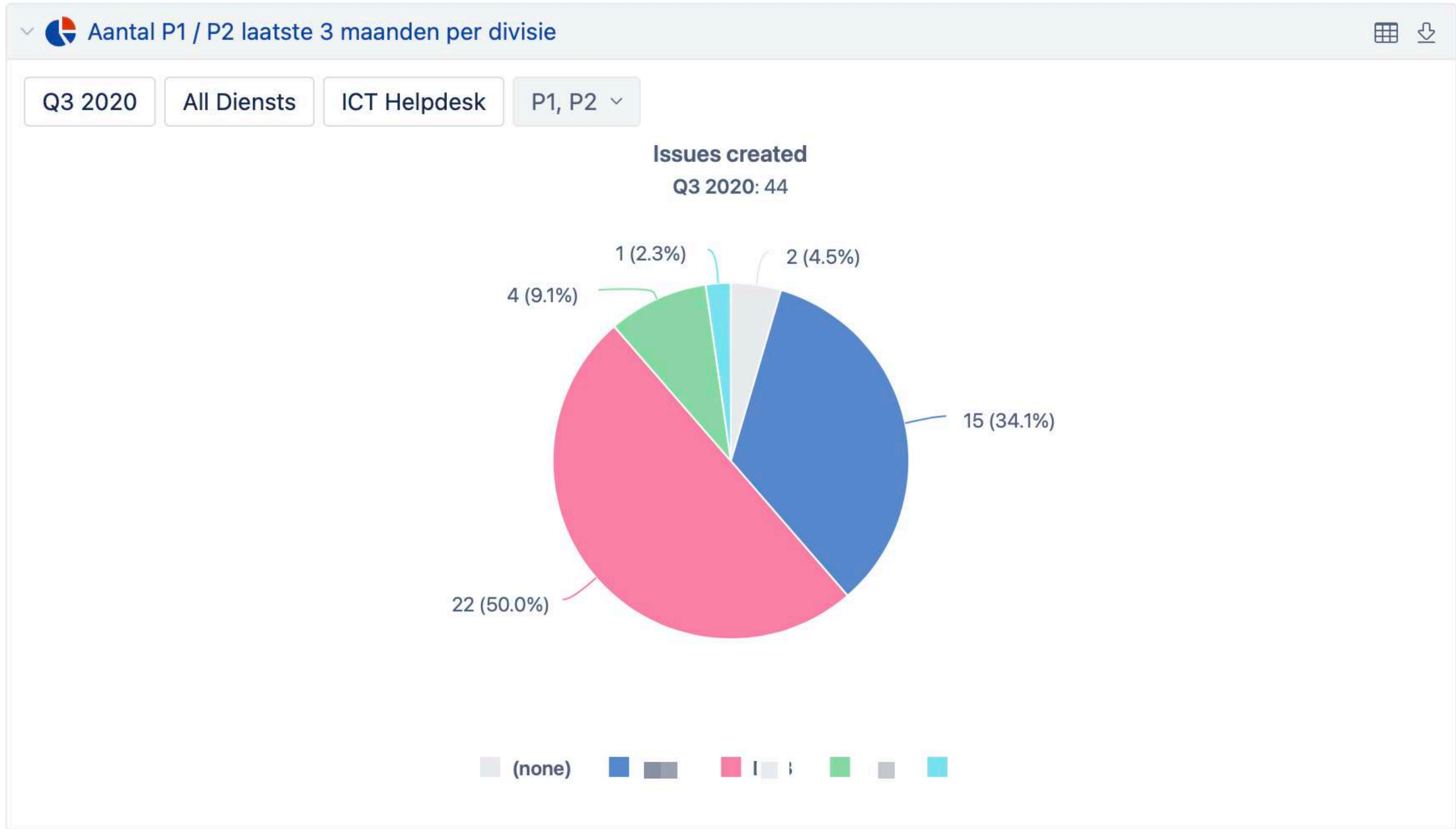
5th M

All Divisies

Q3 2020

ICT Helpdesk

All Diensts



Kritische meldingen overzicht

Q3 2020

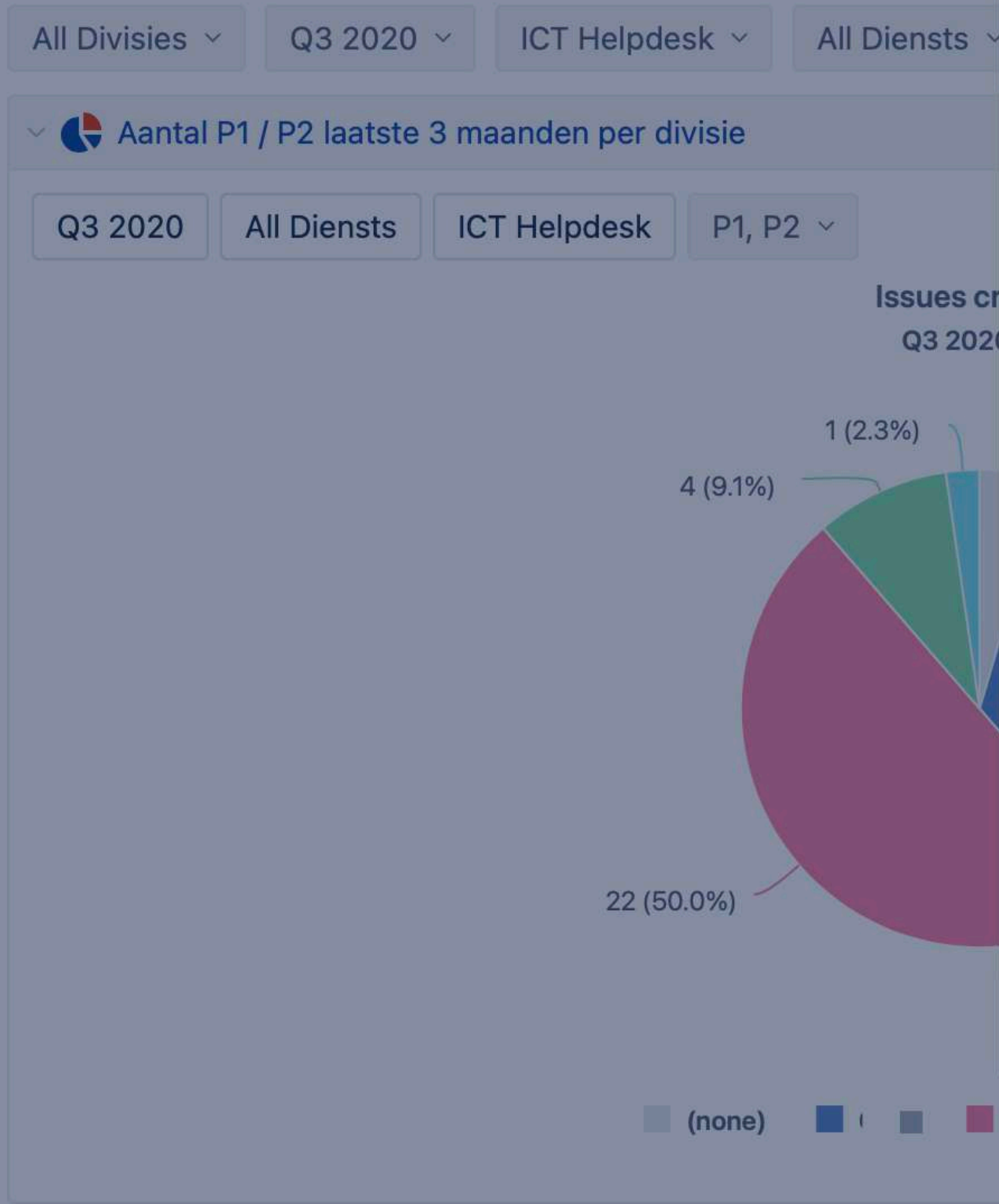
All Divisies

All Diensts

ICT Helpdesk

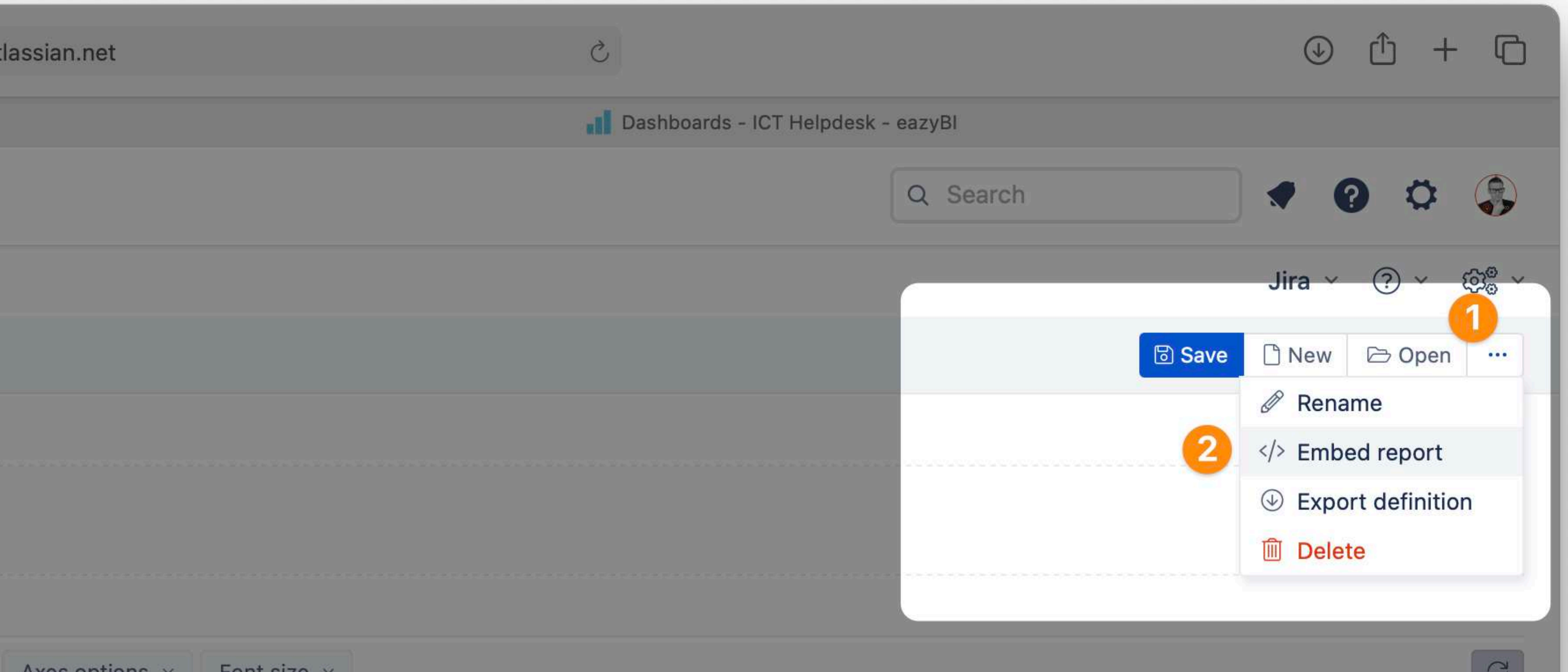
			Issue created date	Issue resolution date	Issue status	Issue Application	Issue Time to resolution 1st line Breached	Issue Time to resolution 1st line Elapsed hours	Issue RCA Link	Escalatiewacht
+ Jul 2020	P2	ICTHELP-4838 P2: <div></div>	Jul 07 2020	Jul 07 2020	Closed		Not breached	2020-07-07T14:30:22+0200,Completed,Not breached,0.08	https://confluence.nl/pages/viewpage.action?pageId=123456789	
		ICTHELP-4839 P2: <div></div>	Jul 07 2020	Jul 07 2020	Closed		Not breached	2020-07-07T12:34:57+0200,Completed,Not breached,0.01	https://confluence.nl/pages/viewpage.action?pageId=987654321	
		<div></div>	Jul 07 2020	Jul 07 2020	Closed	MS Excel	Not	2020-07-	https://confluence.nl/pages/viewpage.action?pageId=111111111	

Kwartaal: Servicedesk rapportage



Embed report in web pages

E.g. in Confluence



Embed report in web pages

E.g. in Confluence

Embed report in another HTML page

Copy and paste this **iframe** code into another HTML page. You can modify width and height attributes as needed (currently they are specified for current visible report size).

```
<iframe width="1480" height="487"
src="https://aod.eazybi.com/accounts/5/.../embed/report/5...i6?
embed_token=...27k762s4hlq1m435ega"
frameborder="0"></iframe>
```

☒ Enable public access with a token [Regenerate access token](#)

☒ Show header

☒ Show border


☐ Enable results export

☐ Disable report actions (except enabled below)

☐ Automatically refresh


Width Height



Embed report in Confluence








Normal text ▾



B*I*⋮

▬ ▾

 ▾

Publish

Close⋮

Development / Pages / Development / Financial info / Embed iframe

↔

Embed iframe

Iframe | src = https://aod.eazybi.co...

Edit 'Iframe' Macro

Add an iframe to your page.

URL *

https://aod.eazybi.com/accounts/509

URL source of the iframe

ID


Class

Enter a CSS class to apply to the content (optional).

Styles

Enter CSS styles

Title

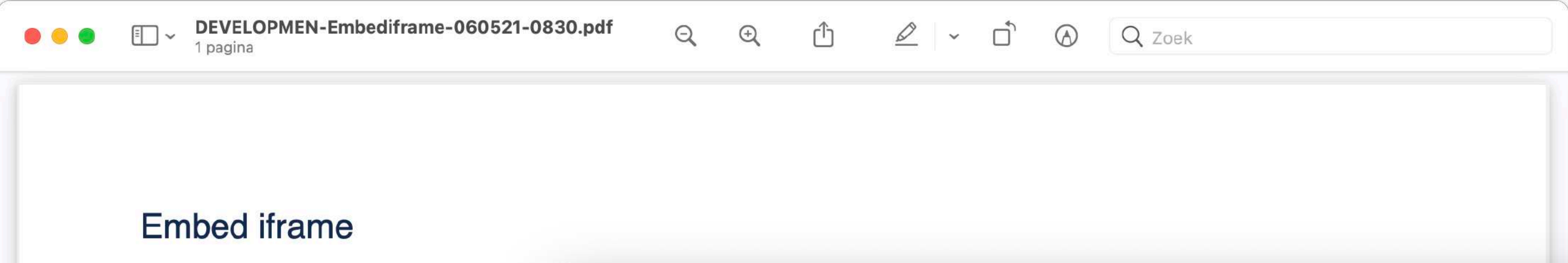
 Preview

Select macro

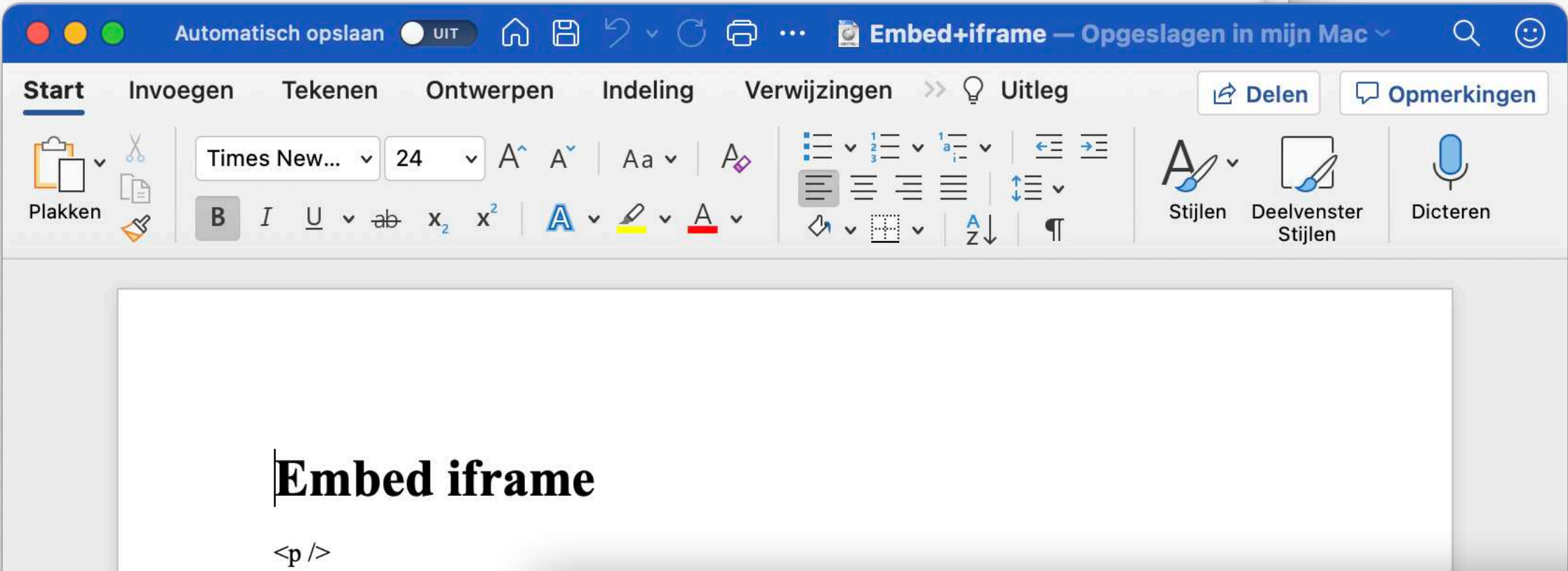
Save

Cancel

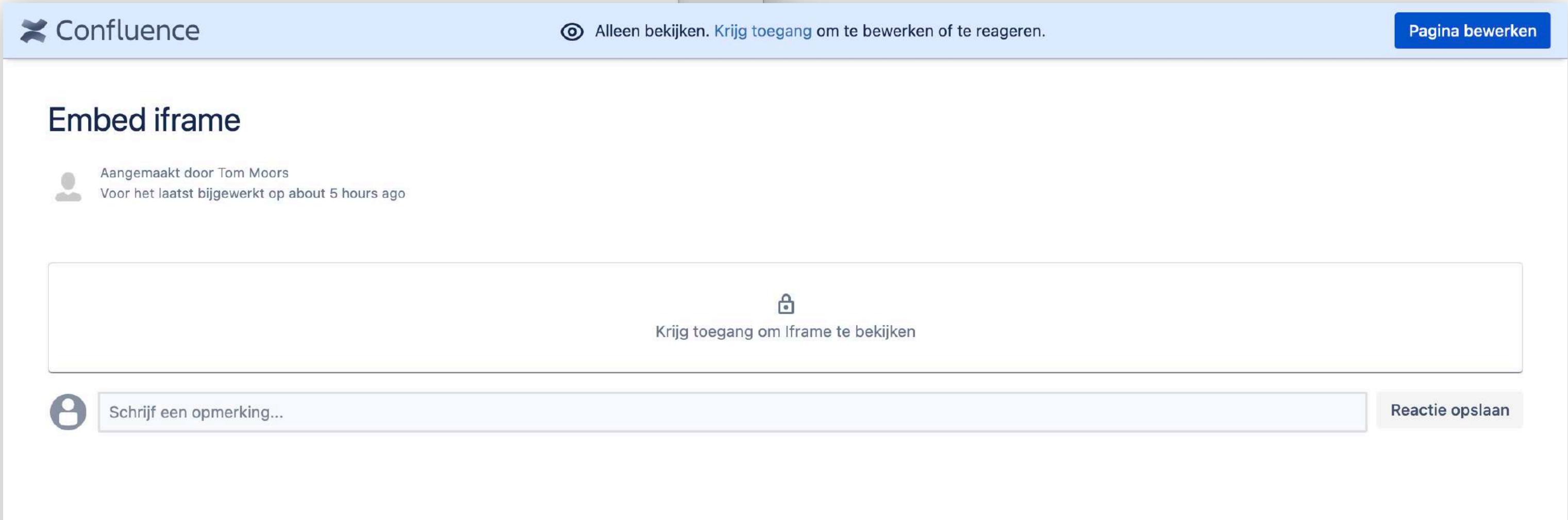
Export report from Confluence



Export to pdf

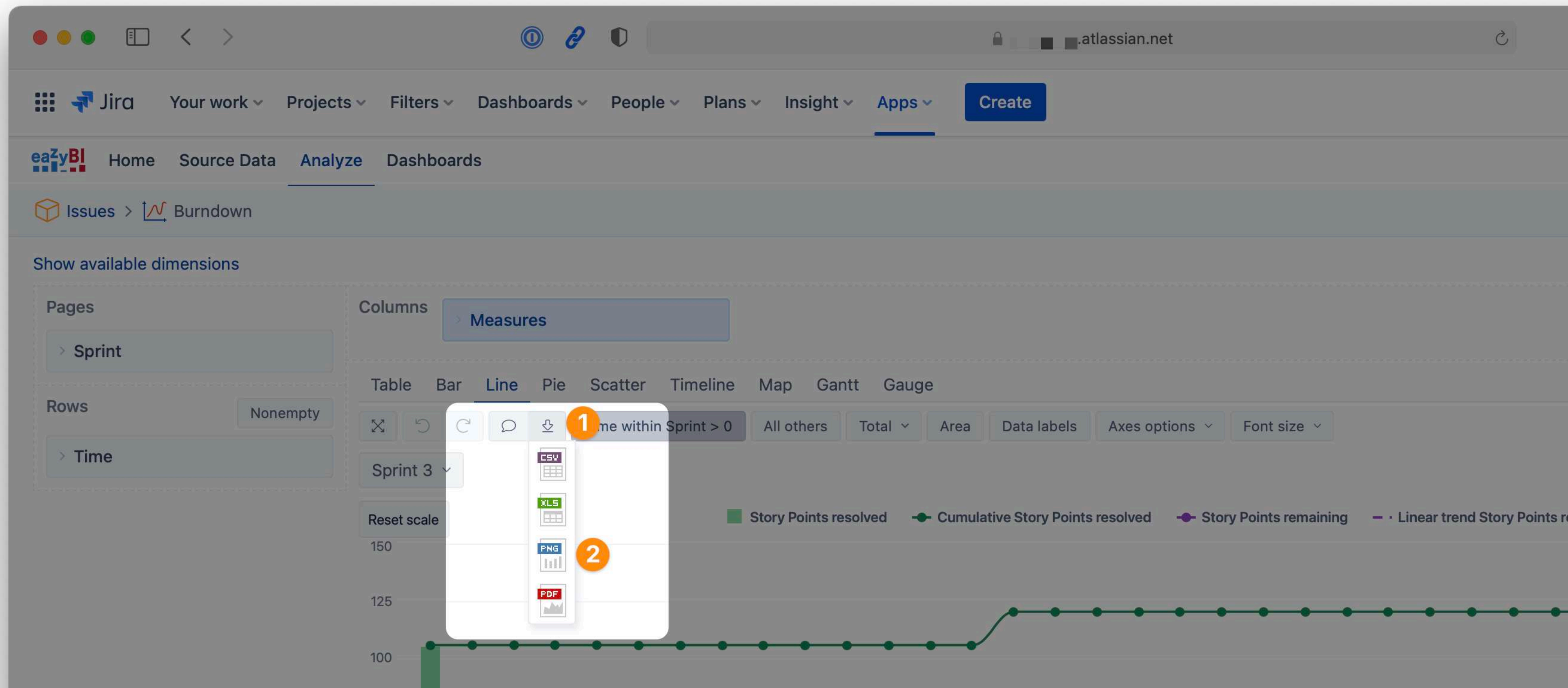


Export to Word



Confluence Cloud: share

Download reports



EasyBI snapshotting toolkit

Internal project for some customers

Confluence

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Sprint reports

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Space Settings

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TemplatesReorder PagesOrphaned PagesUndefined PagesAttachmentsTrashExportRSS Feeds

User Created Templates

Create New Template

Name	Description	Last Updated By	Updated	Operations
Sprint report		Tom Moors	May 06, 2021	Promote · Edit · Delete

Blueprint templates

[What are Blueprints?](#)

Master project documentation	Promote · Disable
Master project documentation	Edit
Service team health monitor	Promote · Disable
Service team health monitor	Edit
Career development plan	Promote · Disable
Career development plan	Edit
Virtual event	Promote · Disable
Virtual event	Edit
ITSM change management	Promote · Disable
ITSM change management	Edit
Design systems	Promote · Disable
Design systems	Edit

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Created by Tom Moors

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2021-05-06 Sprint Report

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Just a moment ago • 1 min read • Analytics

- 👁️ Last sprint: overview
- 🚗 Velocity
- 📊 Burndown
- 📝 Issue overview
- Actions
- Decisions

👁️ Last sprint: overview

 This placeholder will be replaced by an actual snapshot of the report as image.

Remarks




Velocity

 This placeholder will be replaced by an actual snapshot of the report as image.

Remarks

Burndown

 This placeholder will be replaced by an actual snapshot of the report as image.

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Sprint reports

• 2021-03-19 Sprint Report

• 2021-04-02 Sprint Report

• 2021-04-16 Sprint Report

• 2021-04-30 Sprint Report

• 2021-05-06 Sprint Report

Development / Sprint reports

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2021-05-06 Sprint Report

ET

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- 👁 Last sprint: overview
- 🏎 Velocity
- 📉 Burndown
- 📝 Issue overview
- Actions
- Decisions

👁 Last sprint: overview

Ecomm Platform Dev

Sprint issues at closing


■ (deleted)

■ In Review

■ To Do

■ In Progress

■ Done



Issue Status	Count
To Do	3
In Progress	3
Done	1

Remarks

🏎 Velocity

Ecomm Platform Dev

■ Sprint Story Points committed

■ Sprint Story Points completed

➡ Running Story Points velocity for 5 closed sprints

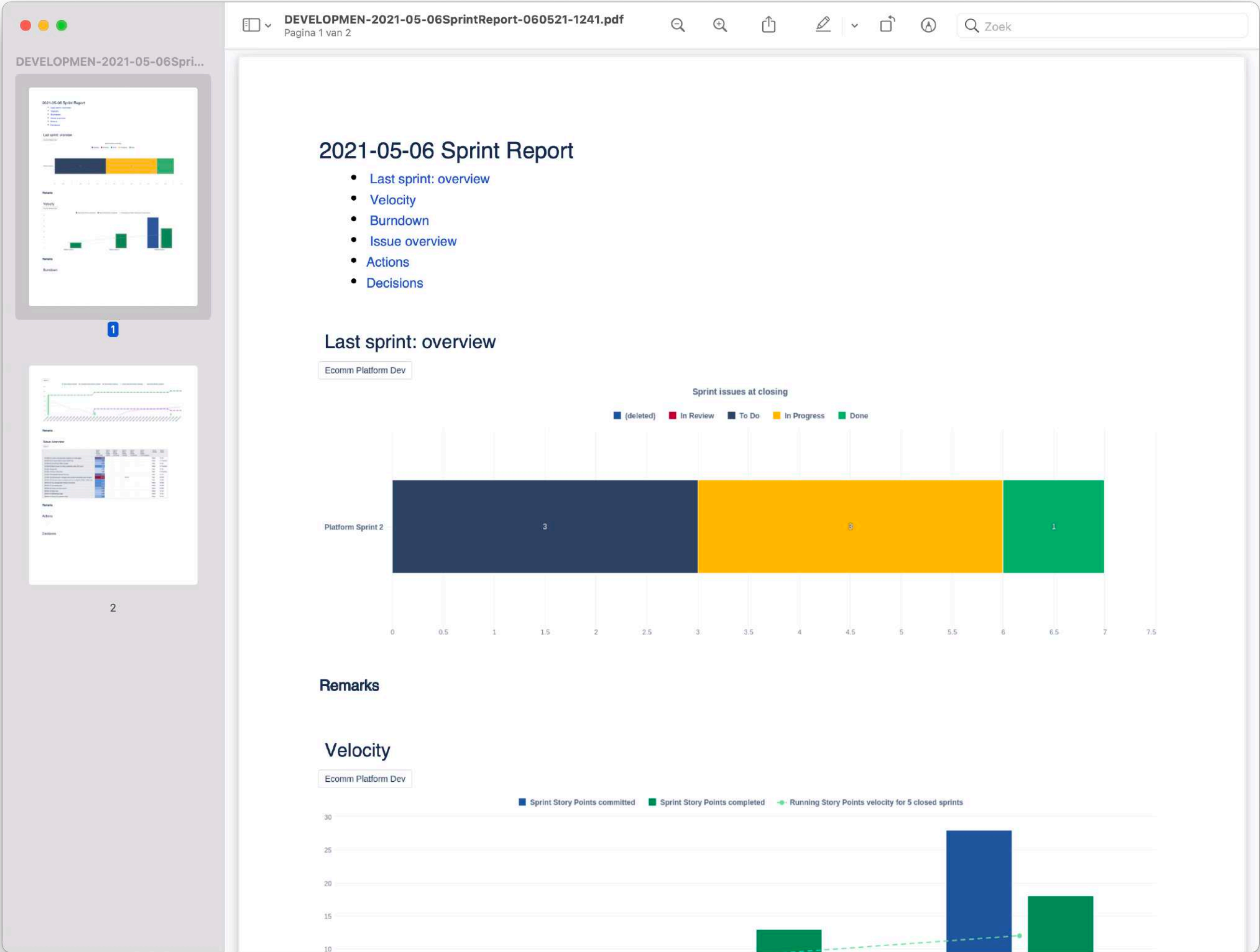


30

Sharing status reports

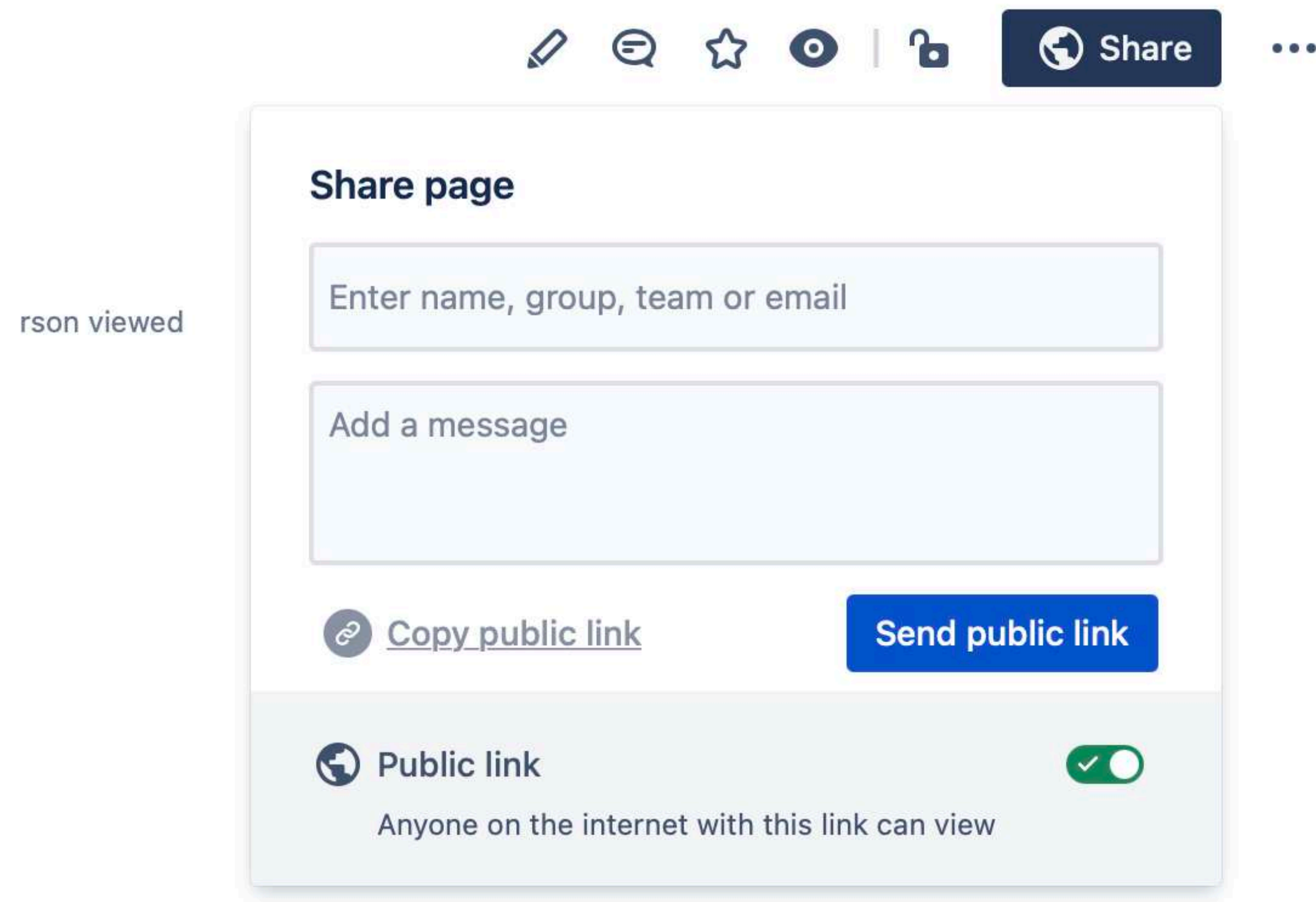
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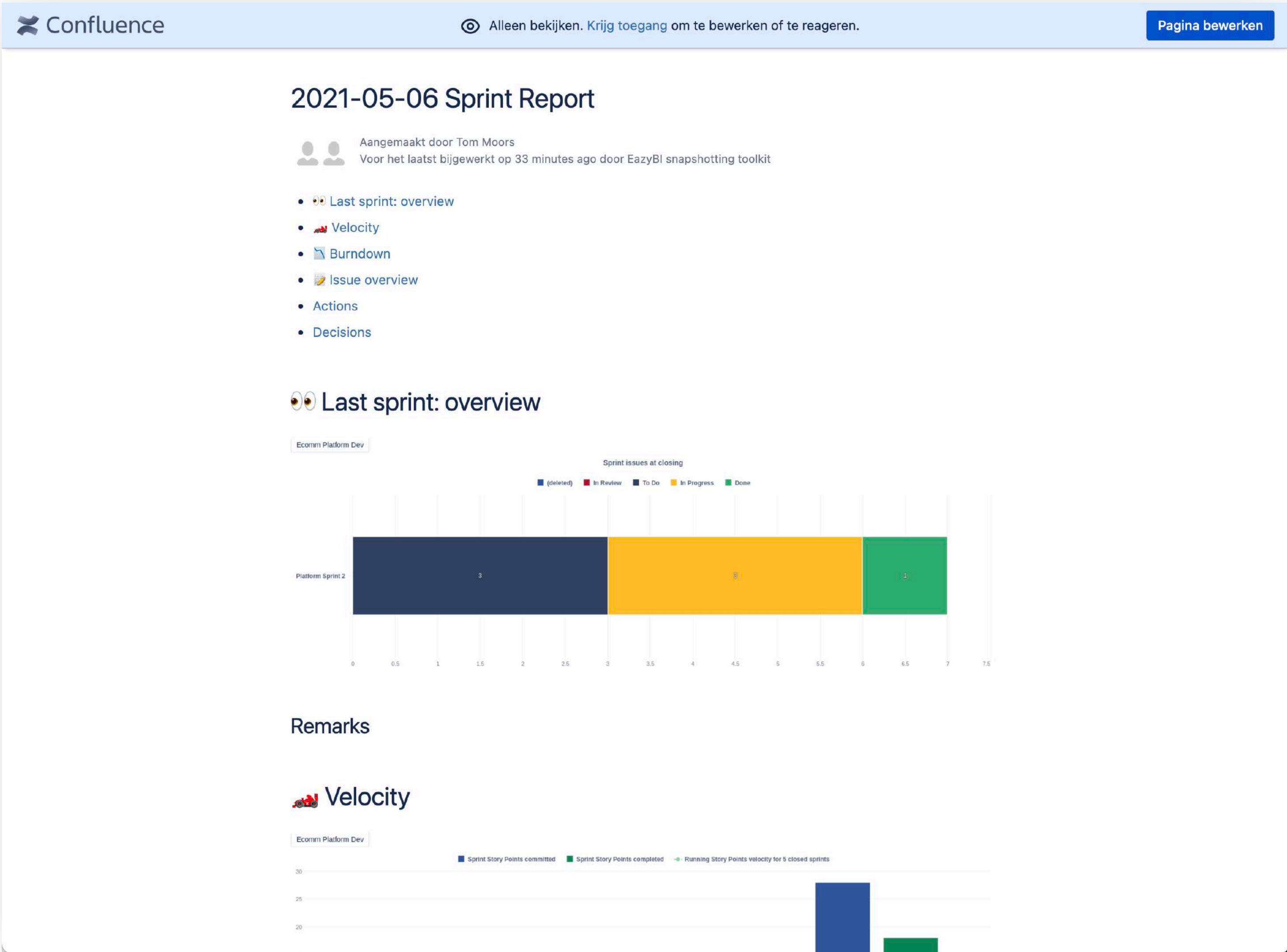
Share a page?

Confluence Cloud



Share a page?

Confluence Cloud



More info coming soon at <https://www.idalko.com/eazybi-reporting>

@tommoors

DANKE!
THANK YOU!
MERCI!
GRAZIE!
GRACIAS!
DANK JE WEL!

.....

Other questions?
tom.moors@idalko.com