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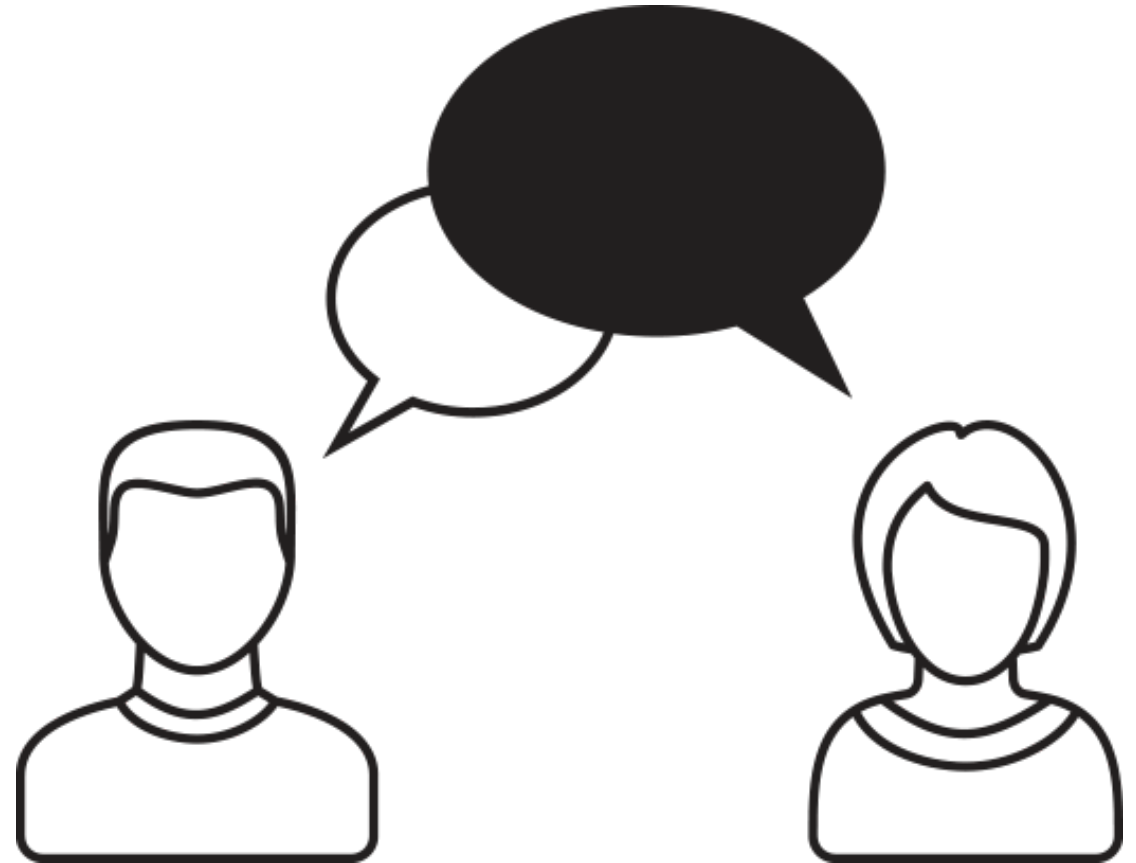
Portlets | Advanced

Your Guides: Rahul Agrawal, Anthony Alcala



Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



Agenda

- Multi-Dimensional Portlets
 - Syntax
 - How to create a sample portlet
- Drilldown Portlets
 - Syntax
 - How to create a sample drilldown portlet
- Common Portlet Issues
- RegoXchange References
- Questions

Multi-Dimensional Portlets

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Let Rego be your guide.

Multi-Dimensional Portlets

The Goal !

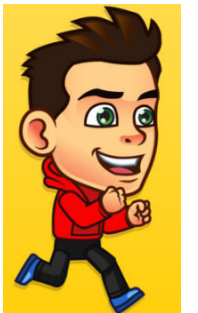


We are going to build a Portlet that displays ETC by Tasks over time (timescaled)

Overview: Rahul Test Tab



ETC by Tasks Over Time													
Start Date		1/1/2017						Time Scaled Value		Monthly			
Finish Date		6/30/2017											
Filter		Save Filter		Clear									
Project Code	Project Name	Resource	Task	Assignment Finish	Assignment Start	ETC Total	2017-01-01 ETC (Hours)	2017-02-01 ETC (Hours)	2017-03-01 ETC (Hours)	2017-04-01 ETC (Hours)	2017-05-01 ETC (Hours)	2017-06-01 ETC (Hours)	2017-07-01 ETC (Hours)
APP01	Bat Signal	Alfred, Al	Bat Signal	12/29/17	2/29/16	910	154	140	161	140	161		
APP01	Bat Signal	Dolak, Jerry	Bat Signal	12/29/17	10/5/15	1,040	176	160	184	160	184		
APP01	Bat Signal	Wuenstel, Chris	Bat Signal	12/29/17	2/23/15	1,040	176	160	184	160	184		
ID1015	RA Test Idea	Agrawal, Rahul	RA Test Idea	12/29/17	1/1/16	520	88	80	92	80	92		
ID1015	RA Test Idea	Almeida, Joe	RA Test Idea	12/29/17	1/1/16	208	35.2	32	36.8	32	36.8		
ID1015	RA Test Idea	America, Captain	RA Test Idea	12/29/17	1/1/16	832	140.8	128	147.2	128	147.2		



Let's begin !

Multi-Dimensional Portlets

- What is Multi-dimensional?



1 Dimension

Sample Single Dimension Portlet

Project	Resource	Task	Slice Date▲	Cost	Hours
Project 1	Resource 1	Task 1	1/1/15	100	2
Project 1	Resource 1	Task 2	1/1/15	150	3
Project 1	Resource 1	Task 3	1/1/15	200	4
Project 1	Resource 2	Task 1	1/1/15	150	3
Project 1	Resource 2	Task 2	1/1/15	200	4
Project 1	Resource 2	Task 3	1/1/15	250	5
Project 1	Resource 3	Task 1	1/1/15	200	4
Project 1	Resource 3	Task 2	1/1/15	250	5
Project 1	Resource 3	Task 3	1/1/15	300	6
Project 2	Resource 1	Task 1	1/1/15	100	2

Dimension 2



Dimension 1

Sample Multi-Dimensional Portlet

Project▲	Resource	Task	Jan 2015		Feb 2015		Mar 2015		Apr 2015		May 2015		Jun 2015		Jul 2015	
			Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost	Hours	Cost
Project 1	Resource 1	Task 1	2	100	2	100	2	100	2	100	2	100	2	100	2	100
Project 1	Resource 1	Task 2	3	150	3	150	3	150	3	150	3	150	3	150	3	150
Project 1	Resource 1	Task 3	4	200	4	200	4	200	4	200	4	200	4	200	4	200
Project 1	Resource 2	Task 1	3	150	3	150	3	150	3	150	3	150	3	150	3	150
Project 1	Resource 2	Task 2	4	200	4	200	4	200	4	200	4	200	4	200	4	200
Project 1	Resource 2	Task 3	5	250	5	250	5	250	5	250	5	250	5	250	5	250
Project 1	Resource 3	Task 1	4	200	4	200	4	200	4	200	4	200	4	200	4	200
Project 1	Resource 3	Task 2	5	250	5	250	5	250	5	250	5	250	5	250	5	250
Project 1	Resource 3	Task 3	6	300	6	300	6	300	6	300	6	300	6	300	6	300
Project 2	Resource 1	Task 1	2	100	2	100	2	100	2	100	2	100	2	100	2	100

Multi-Dimensional Portlets: Syntax

7

- NSQL Syntax

Single Dimension

```
SELECT @SELECT:DIM:USER_DEF:IMPLIED:ASSIGNMENT:A.PRID:ID@  
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:INVI.ID:PROJECT_ID@
```



Adding Second Dimension

```
SELECT @SELECT:DIM:USER_DEF:IMPLIED:ASSIGNMENT:A.PRID:ID@  
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:INVI.ID:PROJECT_ID@  
, @SELECT:TIMPERIOD:USER_DEF:IMPLIED:ETC.SLICE_DATE:SLICE_DATE_ID@  
, @SELECT:TIMPERIOD_PROP:USER_DEF:IMPLIED:ETC.SLICE_DATE:SLICE_DATE@  
, @SELECT:METRIC:USER_DEF:IMPLIED:ETC.SLICE:ETC@
```

- Dimension Column
- Dimension Property

	DIM2	DIM2	DIM2
DIM1	METRIC	METRIC	
DIM1	METRIC		METRIC
DIM1		METRIC	
DIM1	METRIC		METRIC

DIM1 = ASSIGNMENT
DIM2 = TIMEPERIOD (timescaled)
METRIC = ETC

Multi-Dimensional Portlets: Query

- Multi-Dimensional Query

```

SELECT @SELECT:DIM:USER_DEF:IMPLIED:ASSIGNMENT:A.PRID:ID@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:INVI.CODE:PROJECT_CODE@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:INVI.NAME:PROJECT_NAME@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:T.PRNAME:TASK_NAME@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:SRMR.FULL_NAME:RESOURCE_NAME@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:A.PRSTART:ASSIGNMENT_START@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:A.PRFINISH:ASSIGNMENT_FINISH@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:SUM(ETC.SLICE) OVER (PARTITION BY A.PRID):ETC_TOTAL@

, @SELECT:DIM:USER_DEF:IMPLIED:TIMEPERIOD:ETC.SLICE_DATE:SLICE_DATE_ID@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:TIMEPERIOD:TO_CHAR(ETC.SLICE_DATE, 'YYYY-MM-DD'):SLICE_DATE@
, @SELECT:METRIC:USER_DEF:IMPLIED:ETC.SLICE:ETC@
FROM INV_INVESTMENTS INVI
JOIN PRTASK T ON INVI.ID = T.PRPROJECTID
JOIN PRASSIGNMENT A ON T.PRID = A.PRTASKID
JOIN SRM_RESOURCES SRMR ON A.PRRESOURCEID = SRMR.ID
JOIN PRJ_BLB_SLICES ETC ON A.PRID = ETC.PRJ_OBJECT_ID
WHERE 1=1
AND ETC.SLICE_REQUEST_ID = (SELECT SR.ID FROM PRJ_BLB_SLICEREQUESTS SR WHERE SR.REQUEST_NAME= @WHERE:PARAM:USER_DEF:STRING:SLICE BY STRING@ || 'RESOURCEESTCURVE')
AND ETC.SLICE_DATE BETWEEN @WHERE:PARAM:USER_DEF:DATE:START_DATE@ AND @WHERE:PARAM:USER_DEF:DATE:FINISH_DATE@
AND @FILTER@

```

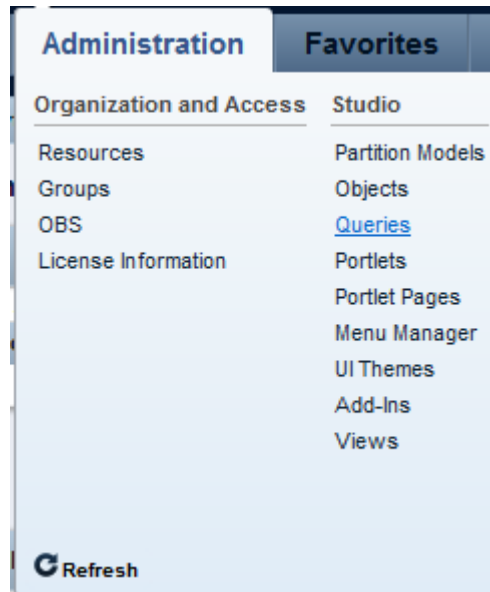
← 1st Dimension (Y-Axis)

← 2nd Dimension (X-Axis)

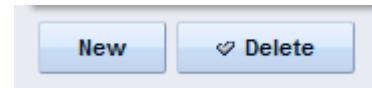
Multi-Dimensional Portlets: Query

- Create Query

Administration -> Queries



Click New



Enter "Query Name" and "Query ID"
Click "Save and Continue"

Query Properties: General

A screenshot of the 'Query Properties: General' form. The 'Query Name' field contains 'ETC by Tasks Over time' and is highlighted with a red box. The 'Query ID' field contains 'regou_etc_by_tasks' and is highlighted with a red box. The 'Available for User Portlets' checkbox is checked. The 'Content Source' dropdown is set to 'Customer'. The 'Category' dropdown is set to '--Select--'. The 'Description' field is empty. The 'Save and Continue' button is highlighted with a red box. At the bottom, there is a legend: a red square with a white 'X' for 'Required', a green square with a white 'X' for 'Enter Once', and a green asterisk for 'Unique'.

Multi-Dimensional Portlets: Query

- Create Query

Remove the default
query and Paste your
query.
Click Save and
Continue

Query: ETC by Tasks Over Time - NSQL

Use this template to create your Niku SQL statement.

■ NSQL

```
SELECT @SELECT:DIM:USER_DEF:IMPLIED:ASSIGNMENT:A.PRID:ID@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:INVI.CODE:PROJECT_CODE@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:INVI.NAME:PROJECT_NAME@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:T.PRNAME:TASK_NAME@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:SRMR.FULL NAME:RESOURCE_NAME@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:A.PRSTART:ASSIGNMENT_START@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:A.PRFINISH:ASSIGNMENT_FINISH@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:ASSIGNMENT:SUM(ETC.SLICE) OVER (PARTITION BY A.PRID):ETC_TOTAL@
, @SELECT:DIM:USER_DEF:IMPLIED:TIMEPERIOD:ETC.SLICE_DATE:SLICE_DATE_ID@
, @SELECT:DIM_PROP:USER_DEF:IMPLIED:TIMEPERIOD:TO_CHAR(ETC.SLICE_DATE, 'YYYY-MM-DD'):SLICE_DATE@
, @SELECT:METRIC:USER_DEF:IMPLIED:ETC.SLICE:ETC@
FROM INV_INVESTMENTS INVI
JOIN PRTASK T ON INVI.ID = T.PRPROJECTID
JOIN PRASSIGNMENT A ON T.PRID = A.PRTASKID
JOIN SRM_RESOURCES SRMR ON A.PRRESOURCEID = SRMR.ID
JOIN PRJ_BLB_SLICES ETC ON A.PRID = ETC.PRJ_OBJECT_ID
WHERE 1=1
AND ETC.SLICE_REQUEST_ID = (SELECT SR.ID FROM PRJ_BLB_SLICEREQUESTS SR WHERE SR.REQUEST_NAME= @WHERE:PA
AND ETC.SLICE_DATE BETWEEN @WHERE:PARAM:USER_DEF:DATE:START_DATE@ AND @WHERE:PARAM:USER_DEF:DATE:FINIS
AND @FILTER@
```

Preview

Save and Continue

Save And Return

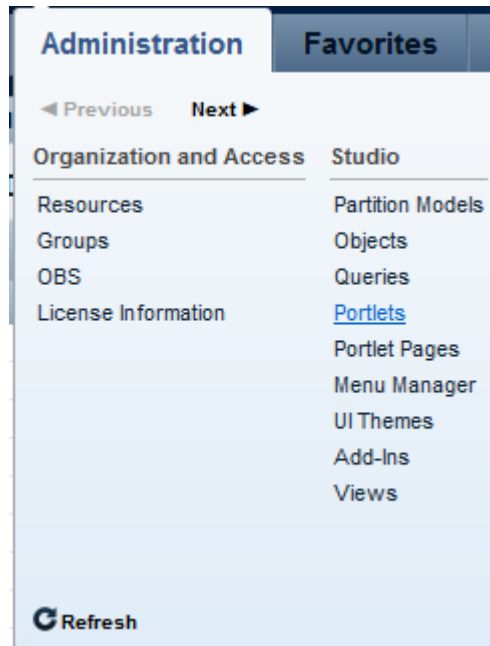
Return

■ = Required

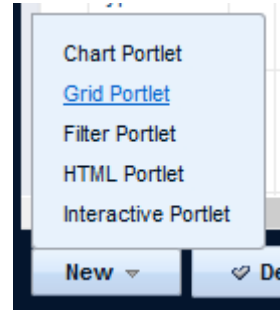
Multi-Dimensional Portlets: Portlet

- Create Portlet

Administration -> Portlets



Click New
Grid Portlet



Enter Portlet Name and ID
Browse for NSQL Query
Click Next

Grid Portlet: General

A screenshot of the 'Grid Portlet: General' configuration form. The form has a 'General' tab. Fields include: 'Portlet Name' (ETC by Tasks Over Time), 'Portlet ID' (regou_etc_by_tasks_portlet), 'Content Source' (Customer), 'Category' (Administration), 'Description' (empty text area), 'Instance Type' (General), and 'Data Provider' (ETC by Tasks Over Time). At the bottom, 'Number of Dimensions' is set to 2 (highlighted with a red box) and 'Number of Metrics' is set to 1. 'Next' and 'Cancel' buttons are at the bottom. A legend at the bottom indicates: Required (red square), Enter Once (green square), and Unique (asterisk).

Multi-Dimensional Portlets: Portlet

• Create Portlet

1) Select Dimension for the Y Axis

Portlet: ETC by Tasks Over Time - Y Axis

☒ Y Axis ASSIGNMENT ▼
(Select the left-most column for the grid.)

Previous Next Cancel

☒ = Required

2) Click Finish and Open

Portlet: ETC by Tasks Over Time - Finish

Click on the Finish button to create the portlet. Further options are available after you click Finish and Open.

Finish Finish and Open Previous Cancel

3) Click on Layout

General List Column Section ▼

Portlet: ETC

☒ Y Axis

Layout

☒ P

Options

☒ Aggregation

The selected fields
will appear on Y-Axis

Select Metric(s)

X-Axis column
grouping

Select the field
to be displayed
as header

Column Layout

Available Columns: id ▲

Selected Columns: project_code ▲, project_name ▲, resource_name ▲, task_name ▲, assignment_finish ▲, assignment_start ▲, etc_total ▲, [Data Columns]* ▲

Required Options: [Data Columns]*.

Data Column Headers

This grid can show multiple columns of data. Use the arrows to show or hide the data and change the column order.

Available: ▲, ▼

Selected: etc ▲, ▼

Row Grouping

Data in this grid can be grouped by multiple dimensions. Use the arrows to change grouping order.

Row Grouping: TIMEPERIOD ▲, [Data Columns] ▼

Column Labels

Dimension	Label
TIMEPERIOD	slice_date ▼

Multi-Dimensional Portlets: Portlet

- Create Portlet

Select the columns to use for sorting

Always sort
on Date first

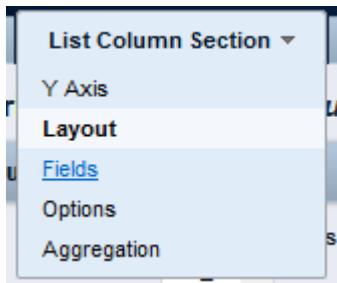
Use slice_date_id,
NOT
slice_date(label)

Column Sorting				
Sort By	Column	Direction		
		Ascending	Descending	
First Field	slice_date_id ▼	<input checked="" type="radio"/>	<input type="radio"/>	
Second Field	project_name ▼	<input checked="" type="radio"/>	<input type="radio"/>	
Third Field	resource_name ▼	<input checked="" type="radio"/>	<input type="radio"/>	
Fourth Field	task_name ▼	<input checked="" type="radio"/>	<input type="radio"/>	
* = required				

Multi-Dimensional Portlets: Portlet

• Create Portlet

Click on Fields



Update Label



Portlet: ETC by Tasks Over Time - List Column Fields

Show: All Display: Selected Go

Column Label	Attribute	Data Type	Display Type
Assignment Finish	assignment_finish	Date	Date Text
Assignment Start	assignment_start	Date	Date Text
ETC (Hours)	etc	Number	Number
ETC Total	etc_total	Number	Number
Project Code	project_code	String	Text
Project Name	project_name	String	Text
Resource	resource_name	String	Text
Task	task_name	String	Text

New Delete Save Save And Return Return

Click on Filter Layout and select filters

Portlet: ETC by Tasks Over Time - List Filter Layout

Layout

Available	Selected (Left Column)	Selected (Right Column)
assignment_finish assignment_start etc etc_total id project_code project_name resource_name slice_date slice_date_id	param_start_date param_finish_date	param_slice_by_string

Add Field Move Field Move Field

Click on Filter fields and update labels

Portlet: ETC by Tasks Over Time - List Filter Fields

Display: Selected

Filter Label	Column	Data Type	Display Type	Required in Filter	Read only in Filter	Filter Default
Finish Date	param_finish_date	Date	Date			
Time Scaled Value	param_slice_by_string	Lookup - String	Pull-Down			Monthly
Start Date	param_start_date	Date	Date			

Save Save And Return Return

Multi-Dimensional Portlets: Portlet

- Create Portlet

Portlet: ETC by Tasks Over Time - List Filter Field

Display: Selected ▼	
Filter Label	Column
Finish Date	param_finish_date
Time Scaled Value	param_slice_by_string
Start Date	param_start_date

Portlet: ETC by Tasks Over Time - Filter Field Properties

Attribute: param_start_date

☒ Filter Label: Start Date

Data Type: Date

Display Type: Date ▼

Filter Default: ☒ Rolling Date: Start of Current Quarter ▼

☐ Specific Date:

Required in Filter: ☒

Hidden in Filter: ☐
(In order to make a filter field hidden a Filter Default must be selected)

Read-Only in Filter: ☐
(In order to make a filter field read only a Filter Default must be selected)

Hint:

Tooltip:

Portlet: ETC by Tasks Over Time - Filter Field Properties

Attribute: param_finish_date

☒ Filter Label: Finish Date

Data Type: Date

Display Type: Date ▼

Filter Default: ☒ Rolling Date: End of Next Quarter ▼

☐ Specific Date:

Required in Filter: ☒

Hidden in Filter: ☐
(In order to make a filter field hidden a Filter Default must be selected)

Read-Only in Filter: ☐
(In order to make a filter field read only a Filter Default must be selected)

Hint:

Tooltip:

Portlet: ETC by Tasks Over Time - Filter Field Properties

Attribute: param_slice_by_string

☒ Filter Label: Time Scaled Value

Data Type: Lookup - String

Display Type: Pull-Down ▼

Lookup: Slice By (String)

Filter Default: Monthly

Required in Filter: ☐

Hidden in Filter: ☐
(In order to make a filter field hidden a Filter Default must be selected)

Read-Only in Filter: ☐
(In order to make a filter field read only a Filter Default must be selected)

Hint:

Tooltip:

Portlet is now ready but don't forget to add to a page.

Multi-Dimensional Portlets: Output

- Create Portlet

Final Output



Overview: Rahul Test Tab

ETC by Tasks Over Time

Start Date: 1/1/2017 Time Scaled Value: Monthly

Finish Date: 6/30/2017

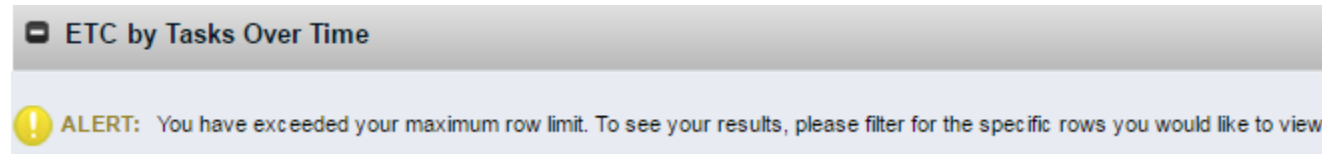
Filter Save Filter Clear

Project Code	Project Name	Resource	Task	Assignment Finish	Assignment Start	ETC Total	2017-01-01 ETC (Hours)	2017-02-01 ETC (Hours)	2017-03-01 ETC (Hours)	2017-04-01 ETC (Hours)	2017-05-01 ETC (Hours)	2017-06-01 ETC (Hours)
APP01	Bat Signal	Alfred, Al	Bat Signal	12/29/17	2/29/16	910	154	140	161	140	161	
APP01	Bat Signal	Dolak, Jerry	Bat Signal	12/29/17	10/5/15	1,040	176	160	184	160	184	
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ID1015	RA Test Idea	Almeida, Joe	RA Test Idea	12/29/17	1/1/16	208	35.2	32	36.8	32	36.8	
ID1015	RA Test Idea	America, Captain	RA Test Idea	12/29/17	1/1/16	832	140.8	128	147.2	128	147.2	

Multi-Dimensional Portlets: Limitation

- Limitations

- Row Limit Governor – 50,000 rows
 - 10 rows of projects with 12 months of data = 120 rows



- Sorting Limitations

Sort on the Date first

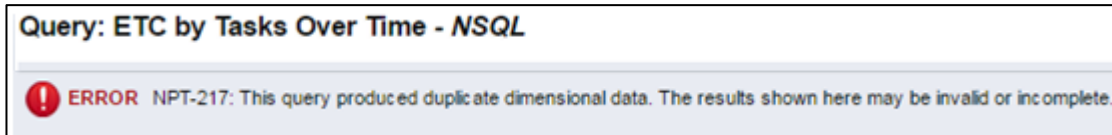


ETC by Tasks Over Time									
Project Code	Project Name	Resource	Task	Assignment Finish	Assignment Start	ETC Total	2017-02-01 ETC (Hours)	2017-01-01 ETC (Hours)	2017-05-01 ETC (Hours)
PRJ0009	Save the World	Alfred, Al	Save the World	9/28/17	2/29/16	1,664.251206	256.0	281.6	294.4
ID1015	RA Test Idea	Almeida, Joe	RA Test Idea	12/29/17	1/1/16	208	32.0	35.2	36.8
ID1015	RA Test Idea	America, Captain	RA Test Idea	12/29/17	1/1/16	832	128.0	140.8	147.2

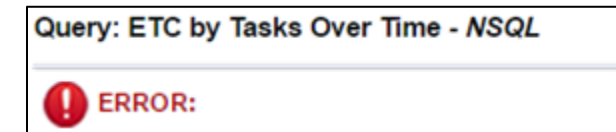
Multi-Dimensional Portlets: Common Errors

• Common Errors Seen

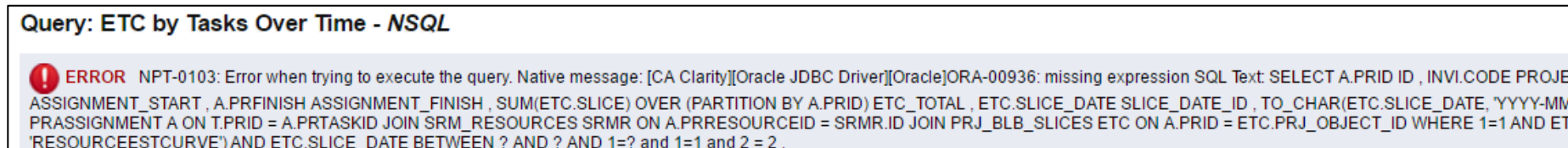
- Duplicate Dimensional Data



- Null Dimensional Key



- ERROR



Possible causes:

- A field listed in the SELECT or WHERE clause does not specify the table name. Because the field name appears in multiple tables, the table name must precede the field name.
- A comma after the last @SELECT statement.
- A comma after the last table listed in the FROM clause.
- Incorrect table name

Drilldown Portlets

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Let Rego be your guide.

Drilldown Portlets

- General Perception – **Complex !!**

- Two Portlets
- Linking
- XML Construct
- Portlet Page (One or Two)
- Filtering
- Confusion??



Drilldown Portlets

- What is Drilldown Portlets ?



- Navigating to portlets that showed detailed information by clicking on a **link** within another portlet
 - Examples –
 - Pie Chart linking to a grid portlet that shows the details
 - Grid portlet showing summarized data linked to a grid that shows the detailed info

Drilldown Portlets

- High Level Implementation Steps:
 - Create Portlet Page with link parameter(s)
 - Create Query for Summary Portlet with link to the Portlet Page
 - Create Portlet based on Summary Query
 - Create Query for detail Portlet that utilizes the parameter(s) from the portlet page
 - Create Portlet based on Detail Query
 - Place Detail Portlet on the Portlet Page created above
 - Add Summary Portlet to a portlet page

Drilldown Portlets : Portlet Page-Link Parameter

- Create Portlet Page with a link parameter

1. Create a new Portlet Page

Page: [New Page] - Create Page

☐

2. Check the Linkable box and Click Save and Continue

Page: Sample Drilldown Page - Properties

☐

☒

3. Create a Link Parameter (make sure the ID is all lowercase)

Page: Sample Drilldown Page - Link Parameter

(The parameter label that the administrator will see when linking)

(This ID will be used in the URL when calling this page)

☐ = Required
 ☐ = Enter Once
 ☒ = Unique

Drilldown Portlets : Source Portlet Query

- Create Query for summary Portlet with link to the Portlet Page
- Input Query Name and ID
- Paste NSQL Query

Query Properties: General

Query Name

Query ID

Available for User Portlets ☒

Content Source

Category

Description

Save and Continue Save And Return Return



Query: Project Summary Query - NSQL

NSQL

```
SELECT
@SELECT:DIM:USER_DEF:IMPLIED:PRJ:INV.ID:PRJID@,
@SELECT:DIM_PROP:USER_DEF:IMPLIED:PRJ:INV.NAME:PRJNAME@,
@SELECT:DIM_PROP:USER_DEF:IMPLIED:PRJ:MGR.USER_ID:MGRID@,
@SELECT:DIM_PROP:USER_DEF:IMPLIED:PRJ:MGR.FULL_NAME:PRJMGR@,
@SELECT:DIM_PROP:USER_DEF:IMPLIED:PRJ:Count(*) :TEAMCOUNT@
FROM
INV_INVESTMENTS INV
JOIN PRI TEAM PT ON INV.ID = PT.PRPROJECTID
JOIN SRM_RESOURCES MGR ON MGR.USER_ID = INV.MANAGER_ID
WHERE INV.ODF_OBJECT_CODE = 'project'
AND @FILTER@
GROUP BY INV.ID,INV.NAME, MGR.USER_ID,MGR.FULL_NAME
HAVING @HAVING_FILTER@
```


Drilldown Portlets : Source Portlet Query

- Click on Linking Tab and Click New

Query: Project Summary Query - Linking

There are no links defined for this query.

New

Return

- Select “Sample Drill Down Page”

Query: Project Summary Query - Link Settings

Name Project Details Drill Link

Link ID regou_drill_link

Description

Action [-- Select --]

Save And Return

Rights by User

Role Capacity

Sample Drilldown Page

Scheduled Report

Schedule Performance Drill Down

- Map the Project Internal ID to **prjid** from the NSQL

Project Internal ID

prjid

Save And Return

Return

Drilldown Portlets: Source Portlet

- Create Summary Portlet
- Provide Portlet Name and ID
- Browse for Data Provider

General

☒ Portlet Name: Project Summary Portlet

☒ ☒ Portlet ID: regou_prj_summary

☒ Content Source: Customer

Category: Administration

Description:

☒ ☒ Instance Type: General

☒ ☒ Data Provider: Project Summary Query

Number of Dimensions: 1

Number of Metrics: 0

☒ = Required ☒ = Enter Once ☒ = Unique

Click on List Columns-> Layout

Configure the Layout

Portlet: Project Summary Portlet - List Column Layout

Column Layout

Available Columns: mgrid, prjid

Selected Columns: prjname, prjmgr, teamcount




Column Sorting

Sort By	Column	Direction	
		Ascending	Descending
First Field	prjname	<input checked="" type="radio"/>	<input type="radio"/>
Second Field	[--Select--]	<input checked="" type="radio"/>	<input type="radio"/>

Update the Labels

Portlet: Project Summary Portlet - List Column F

Show: All Display: Selected

<input checked="" type="checkbox"/> Column Label		Attribute	Data T
Project Manager		prjmgr	String
Project Name		prjname	String
Team Count		teamcount	Numbe

☒ = Required

Click on "Project Name" properties icon

Drilldown Portlets: Source Portlet

- Select the Link that we created.

Link = Project Details Drill Link

Select “Team Count” in Disable Link attribute
This will help disable the link if there are NO
Team members in the project.

Save And Return

Portlet: Project Summary Portlet - List Column Field



General

Attribute prjname

Data Type String

☒ Column Label Project Name

Show Column Label ☒

Display Type Text

Secondary Value [--Select--]

Alignment Left

Column Width %

Width

(Number of columns)

Height

(Number of rows)

Allow Word Wrapping in Column Header ☐

Allow Word Wrapping in Column ☒

Link Project Details Drill Link

Open as Pop-up ☐

Disable Link Attribute Team Count
(The attribute column value link will be disabled)

Save Save And Return Return

☒ = Required

Drilldown Portlets : Destination Portlet Query

- Create Query for Detail Portlet

Query Properties: General

Query Name	Project Details Query-drilldown
Query ID	regou_destination_qry
Available for User Portlets	<input checked="" type="checkbox"/>
Content Source	Customer
Category	[--Select--]
Description	

Query Name: Project Details Query-drilldown

Query ID: regou_destination_qry

Paste the NSQL

Query: Project Details Query-drilldown - NSQL

NSQL	<pre>SELECT @SELECT:DIM:USER_DEF:IMPLIED:RES:srm.id:RESID@, @SELECT:DIM_PROP:USER_DEF:IMPLIED:RES:srm.full_name:Resource_Name@ FROM PTEAM PT JOIN SRM_RESOURCES SRM ON SRM.ID = PT.PRRESOURCEID WHERE 1=1 And (@WHERE:PARAM:XML:STRING:/data/prjid/@value@ IS NULL OR @WHERE:PARAM:XML:STRING:/data/prjid/@value@ =PT.PRPROJECTID) AND @FILTER@</pre>
<div> <div>Preview</div> <div>Save and Continue</div> <div>Save And Return</div> <div>Return</div> </div>	

Drilldown Portlets : Destination Portlet NSQL

XPATH (XML Parameter) Construct

Enables a portlet to retrieve a name-value pair from the XML page URL to a user-defined portlet

Format:

@WHERE:PARAM:XML:STRING:/data/prjid/@value@

Case sensitive (Best Practice – all lowercase IDs)

This construct can only be used on a specific portlet instance type, not the *General* portlet instance type.

This construct expects the internal ID value to come from the URL that is displaying the page that contains the portlet

```
SELECT
    @SELECT:DIM:USER_DEF:IMPLIED:RES:srm.id:RESID@,
    @SELECT:DIM_PROP:USER_DEF:IMPLIED:RES:srm.full_name:Resource_Name@
FROM PRTEAM PT
JOIN SRM_RESOURCES SRM ON SRM.ID = PT.PRRESOURCEID
WHERE 1=1
```

```
AND (@WHERE:PARAM:XML:STRING:/data/prjid/@value@ IS NULL
    OR @WHERE:PARAM:XML:STRING:/data/prjid/@value@ =PT.PRPROJECTID)
```

```
AND @FILTER@
```


Drilldown Portlets : Destination Portlet

- Create Detail Portlet
- Input Portlet Name and ID
- Browse for Query
- Click Next
- Click Finish and Open
- Go to Column Layout
- Update the Layout
- Update Column Sorting
- Update Field Label

General

Portlet Name: Project Details Portlet -drilldown

Portlet ID: regod_detail_portlet_drilldown

Content Source: Customer

Category: Administration

Description:

Instance Type: General

Data Provider: Project Details Query-drilldown

Number of Dimensions: 1

Number of Metrics: 0

Next Cancel

Portlet: Project Details Portlet -drilldown - List Column Layout

Column Layout

Available Columns: resid

Selected Columns: resource_name

Column Sorting

Sort By	Column	Direction	
		Ascending	Descending
First Field	resource_name	<input checked="" type="radio"/>	<input type="radio"/>
Second Field	[--Select--]	<input type="radio"/>	<input type="radio"/>
Third Field	[--Select--]	<input type="radio"/>	<input type="radio"/>
Fourth Field	[--Select--]	<input type="radio"/>	<input type="radio"/>

Save Save And Return Return

Portlet: Project Details Portlet -drilldown - List Column Fields

Show: All Display: Selected Go

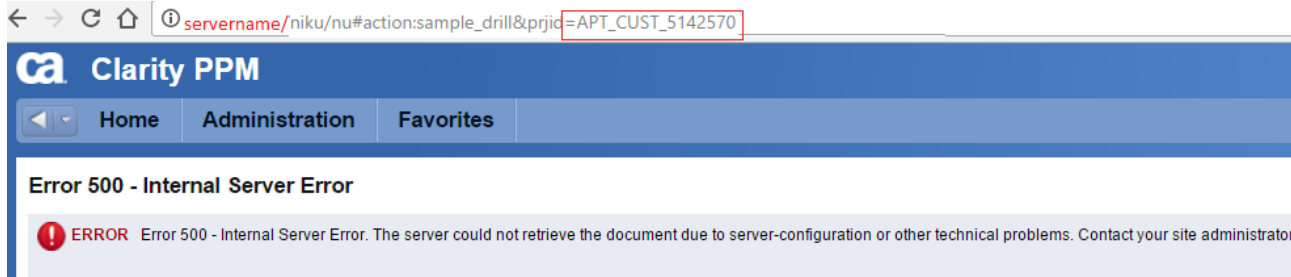
Column Label	Attribute	Data Type	Display
Resource Name	resource_name	String	Text

Drilldown Portlets: Portlet Page(s)

- Final piece - Placing the two Portlets on the Portlet Page(s)
- It requires at least ONE portlet page.
- The detail portlet MUST be placed on the page that was created previously.
- The Summary Portlet can be placed on the same page OR to another page.
- Add the portlet page that contains the Summary Portlet as a new link on the Menu using Menu Manager

Drilldown Portlets: Portlet Page(s)

- CASE#1: Placing both the portlet on the same portlet page.



- Go Back to Portlet Page -> Link Parameter

Page: Sample Drilldown Page - *Link Parameter*

Parameter Name: Project Internal ID
(The parameter label that the administrator will see)

Parameter ID: prjid
(This ID will be used in the URL when calling this)

Parameter Source: APT_CUST_5142570



Add the below AND condition to Detail Query

AND @WHERE:PARAM:XML:STRING:/data/prjid/@value@ != 'APT_CUST_5142570'

Query: Project Details Query-drilldown - NSQL

```

NSQL
SELECT
@SELECT:DIM:USER_DEF:IMPLIED:RES:srm.id:RESID@,
@SELECT:DIM_PROP:USER_DEF:IMPLIED:RES:srm.full_name:Resource_Name@
FROM PRIEAM PT
JOIN SRM_RESOURCES SRM ON SRM.ID = PT.PRRESOURCEID
WHERE 1=1
AND(@WHERE:PARAM:XML:STRING:/data/prjid/@value@ IS NULL
    OR @WHERE:PARAM:XML:STRING:/data/prjid/@value@ =PT.PRPROJECTID)
AND @WHERE:PARAM:XML:STRING:/data/prjid/@value@ != 'APT_CUST_5142570'
AND @FILTER@
  
```

If the drilldown portlet page is added to the menu, then the parameter value will default to the **Parameter Source**

Drilldown Portlets: Portlet Page(s)

- Click the Menu link again.

Sample Drilldown Page

Project Summary Portlet

Project Name ▲	Project Manager	Team Count
ABC E-Commerce 1	Administrator, Niku	5
ABC E-Commerce (1.1)	Chouhan, Vipin	17
Admin - Technical Environment Training Admin - Technical Environmvery long text	Wuenstel, Chris	11
Advanced Capabilities Enhancement	Dateno, George	6
Akhila's XOGGED Project	Zywiec, David	1
Another Sharepoint Test	Wuenstel, Chris	3
Bat Cave Re-Design	Joshi, Navdeep	8
Big Bang Theory Superhero Contest	Spiderman, Spidy	8
Big Project Multiple Year [JS]	Administrator, Niku	18
BMI - Introduction To Clarity	Dolak, Jerry	4
Budget Allocation 2015	Admin, Rego	4
Build a Software Solution	DeCeglia, Virginia	15
Build home	Reynolds, Clayton	2
Business Strategy v1.0	Manager, Project	1
CER - Test Project 1	Reynolds, Clayton	4
CER Test Idea	Administrator, Niku	3
CER test Project	Administrator, Niku	3
Clarity Implementation Project	Cronin, Ellen	4
Clayton Project 1	Reynolds, Clayton	3
CLR Test Project 042314	Administrator, Niku	6

◀ Page 1 of 6 ▶▶ Displaying 1 - 20 of 108

Project Details Portlet -drilldown

There are no items to display



Sample Drilldown Page

Project Name ▲	Project Manager	Team Count
ABC E-Commerce 1	Administrator, Niku	5
ABC E-Commerce (1.1)	Chouhan, Vipin	17
Admin - Technical Environment Training Admin - Technical Environmvery long text	Wuenstel, Chris	11
Advanced Capabilities Enhancement	Dateno, George	6
Akhila's XOGGED Project	Zywiec, David	1
Another Sharepoint Test	Wuenstel, Chris	3
Bat Cave Re-Design	Joshi, Navdeep	8
Big Bang Theory Superhero Contest	Spiderman, Spidy	8
Big Project Multiple Year [JS]	Administrator, Niku	18
BMI - Introduction To Clarity	Dolak, Jerry	4
Budget Allocation 2015	Admin, Rego	4
Build a Software Solution	DeCeglia, Virginia	15
Build home	Reynolds, Clayton	2
Business Strategy v1.0	Manager, Project	1
CER - Test Project 1	Reynolds, Clayton	4
CER Test Idea	Administrator, Niku	3
CER test Project	Administrator, Niku	3
Clarity Implementation Project	Cronin, Ellen	4
Clayton Project 1	Reynolds, Clayton	3
CLR Test Project 042314	Administrator, Niku	6

◀ Page 1 of 6 ▶▶ Displaying 1 - 20 of 108

Project Details Portlet -drilldown

Resource Name ▲
Agrawal, Rahul
Alfred, Al
Allen, Barry
Brewster, Leanne
Dhar, Sankhadeep
Dolak, Jerry
Holt, Allen

Drilldown Portlets: Portlet Page(s)

- CASE#2: Placing the Summary portlet on different portlet page.

Page: Rahul Test Page - Content

<input type="checkbox"/>	Content
No Maximized Portlet	
<input type="checkbox"/>	Project Summary Portlet

Add Remove Save and Continue Save And Return

The additional AND condition is optional.

Optional

AND @WHERE:PARAM:XML:STRING:/data/prjid/@value@ != 'APT_CUST_5142570'

Add the test Page as link to Menu

Drilldown Portlets: Portlet Page(s)

Rahul Test Page

Project Summary Portlet

Project Name ▲	Project Manager	Team Count
ABC E-Commerce 1	Administrator, Niku	5
ABC E-Commerce (1.1)	Chouhan, Vipin	17
Admin - Technical Environment Training Admin - Technical Environmvery long text	Wuenstel, Chris	11
Advanced Capabilities Enhancement	Dateno, George	6
Akhila's XOGGED Project	Zywiec, David	1
Another Sharepoint Test	Wuenstel, Chris	3
Bat Cave Re-Design	Joshi, Navdeep	8
Big Bang Theory Superhero Contest	Spiderman, Spidy	8
Big Project Multiple Year [JS]	Administrator, Niku	18
BMI - Introduction To Clarity	Dolak, Jerry	4
Budget Allocation 2015	Admin, Rego	4
Build a Software Solution	DeCeglia, Virginia	15
Build home	Reynolds, Clayton	2
Business Strategy v1.0	Manager, Project	1
CER - Test Project 1	Reynolds, Clayton	4
CER Test Idea	Administrator, Niku	3
CER test Project	Administrator, Niku	3
Clarity Implementation Project	Cronin, Ellen	4
Clayton Project 1	Reynolds, Clayton	3
CLR Test Project 042314	Administrator, Niku	6

Click on Project Name

Page 1 of 6

Displaying 1 - 20 of 108



Sample Drilldown Page

Project Details Portlet -drilldown

Resource Name ▲
Agrawal, Rahul
Alfred, Al
Allen, Barry
Brewster, Leanne
Dhar, Sankhadeep
Dolak, Jerry
Holt, Allen
Jones, Bruce
Joshi, Navdeep
Junior Programmer
Murry, Chris
Obrien, Allison
Project Manager
Systems Analyst
Test Engineer
Trainor, Pat
Wachsmann, David

Resource Names appear here



RegoXchange Portlet References

- **RegoXchange** has some EXCELLENT portlets out there !!!
- Take Advantage, Learn 😊
- Allocation Compliance Pie Chart Drilldown
- Project Change Request count w/ Drilldown
- Project Count by Stage w/ Drilldown
- Projects by Status Indicator - Pie w/ Drilldown
- Milestone Task Dependency
- Actuals/ETC/Allocations per Resource
- Capacity Graph
- **Many many more !!!!!**



Questions?



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- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



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