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Jaspersoft | Ad Hoc Reporting

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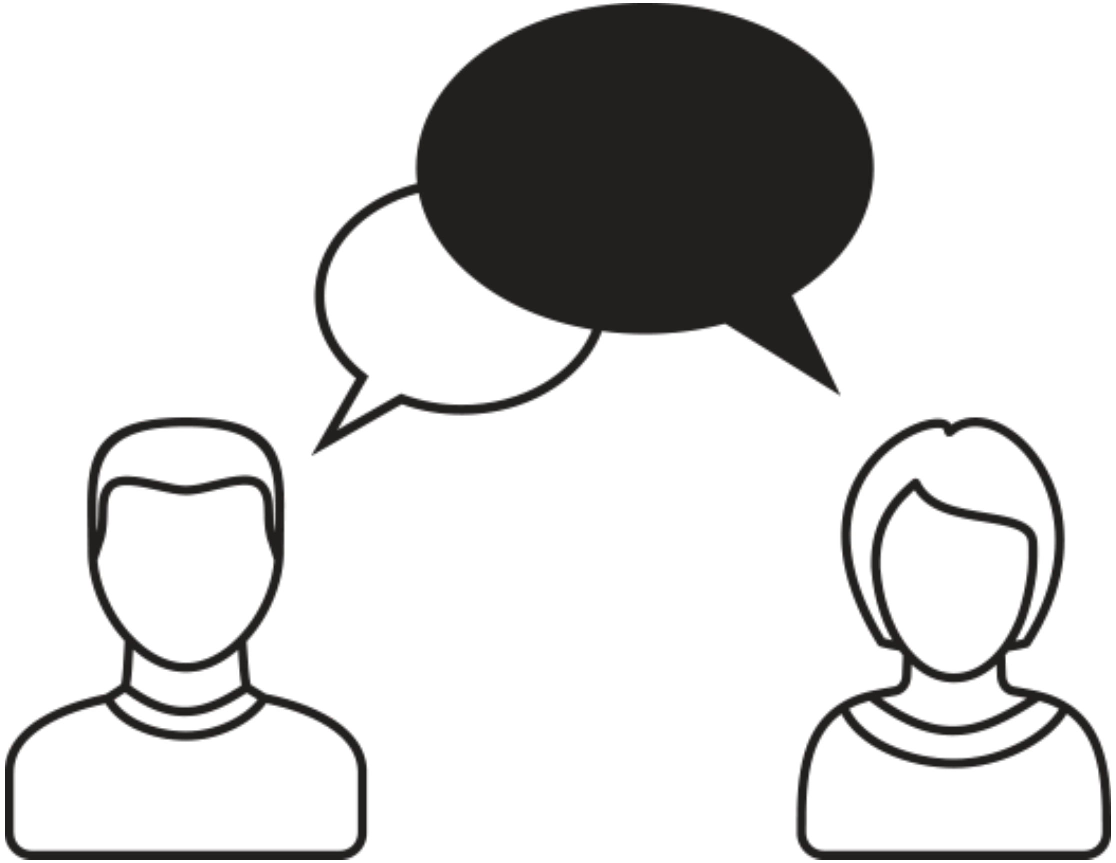
Introductions

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



Agenda

- Introductions
- Overview
- Accessing Advanced Reporting
- Running a Report
- Running an Ad Hoc Report
- Saving and Accessing a Saved Ad Hoc View/Report
- Creating a Cross Tab View
- Creating a Chart
- Creating a Dashboard
- Scheduling a Report
- Q & A

Overview

- ✓ What is Jaspersoft
- ✓ How does Jaspersoft Work
- ✓ Differences between CA PPM Versions 14.2 and 14.3

What is Jaspersoft?

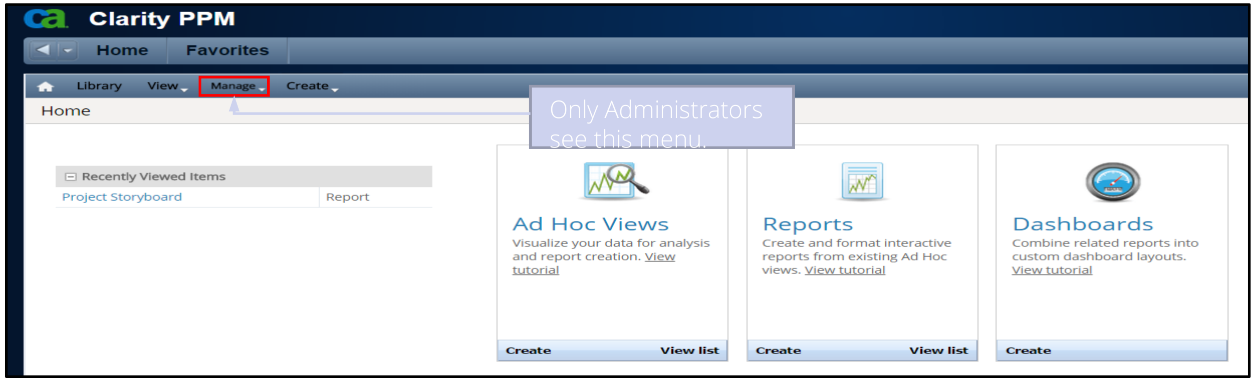
- Jaspersoft is a reporting software that takes information from CA PPM to provide easy to read, highly interactive reports for users.
- Jaspersoft is a rights based reporting system. The capabilities of the Advanced Reporting in CA PPM is dependent on what security users are granted.
- Jaspersoft reporting allows for sorting, filtering, formatting, moving/hiding columns, string searches, zooming in/out which can be saved for future use.
- Jaspersoft comes with pre-formatted CA PPM reports or has the ability to do self-service ad hoc reporting.
- Ad hoc reports are easy to use with drag and drop capability, crosstab views, tables or charts.
- Reports can be published in PDF, XLS, XLSX, CSV, DOC X, RTF, ODT, ODS, HTML, or PPTX.

Jaspersoft Security

The average user will see the following modules in Jaspersoft. These modules allow the user to Create Ad Hoc Views, Run Reports, and Create Dashboards.

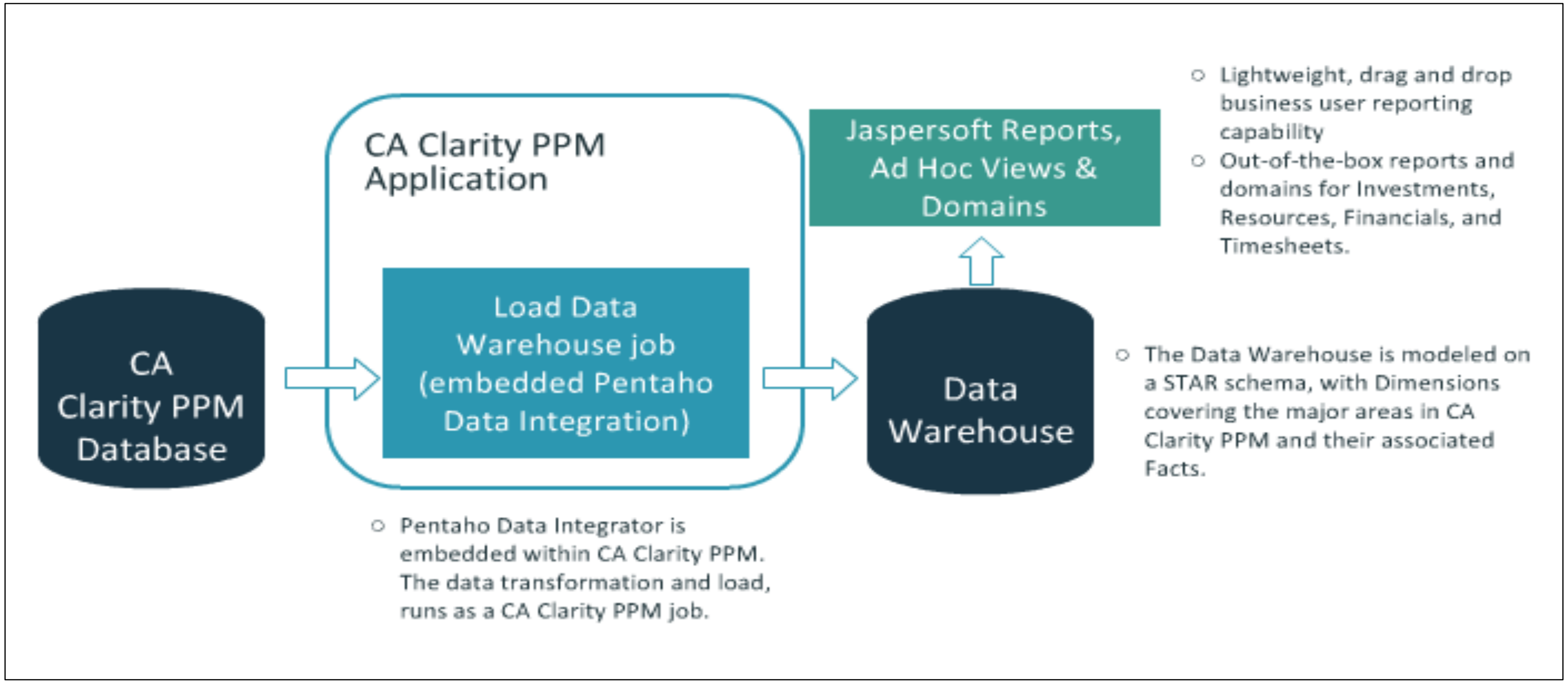
- Advanced Reporting - Ad Hoc Create
- Advanced Reporting - Dashboard Create
- Advanced Reporting – Navigate

The rights above will show them the following when accessing advanced reporting.



Data Warehouse Overview

Jaspersoft data warehouse (or data mart) is where CA PPM fields are stored for use in reports and/or analysis.



Understanding Jaspersoft Domains

CA PPM contains domains that contain the most frequently used product data. Domains provide a **business view** of CA PPMs **Data Warehouse**. They are selected via the Ad Hoc viewer when building Ad Hoc Views. Access to domain data is controlled via security permissions.

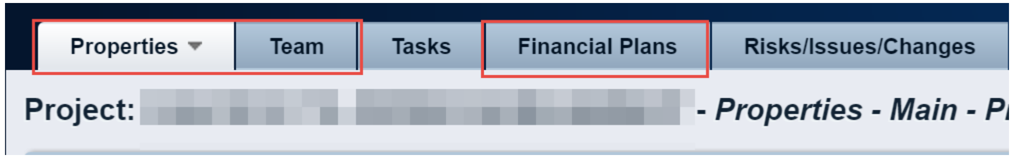
- Investment Management
- Project Management
- Idea Management
- Custom Master Objects
- Resource Management
- Time Management
- Financial Management
- Application Management

Investment Management Domain

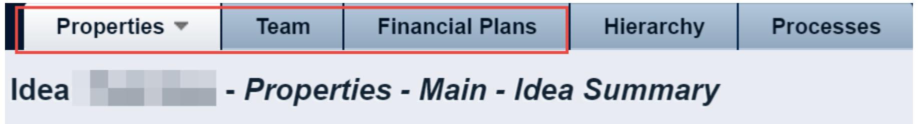
The investment management domain will only show data that is shared between the idea and project. If an attribute gets carried over when converting from idea to project, that attribute will be in this domain.

The following tabs will be available in the Investment Management domain

Project:



Idea:

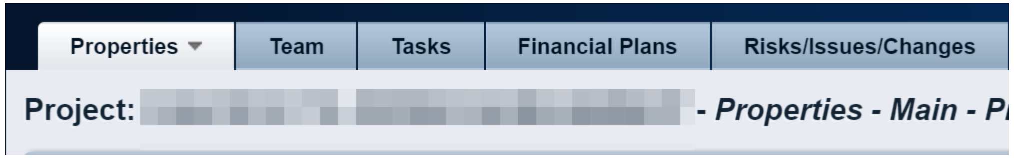


Project Management Domain

The project management domain will only show data that is on the project. This domain is unique because it contains data to the assignment level.

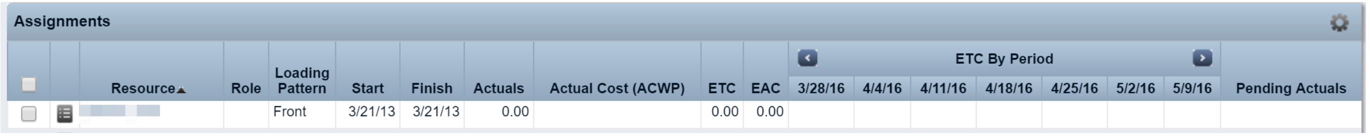
The following data in CA PPM is available in the project management domain

Project:



Task:

Assignment:



Idea Management Domain

The idea management domain will only show data that is on the idea.

The following data in CA PPM is available in the idea management domain

Resource Management Domain

The resource management domain will only show data that is directly on the resource.

The following data in CA PPM is available in the resource management domain

Time Management Domain

The time management domain will only show data that is on the timesheets.

The following data in CA PPM is available in the time management domain

Timesheet

Time Period: 3/27/16 - 4/2/16

Resource Name Submitted by

Timesheet Status Submitted Last Modified 3/31/16 2:48 PM

Investment	Description	Input Type Code	Sun 3/27	Mon 3/28	Tue 3/29	Wed 3/30	Thu 3/31	Fri 4/1	Sat 4/2	Total
Tasks										
		Regular_Hours		9.00	8.00	9.00	9.00	8.00		43.00
	Total		0.00	9.00	8.00	9.00	9.00	8.00	0.00	43.00

[Configure]
[Printable Version]

Approve | Return Timesheet | Cancel

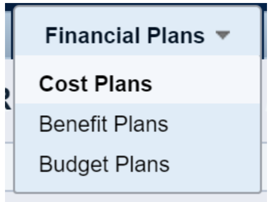
Work Effort = Hours

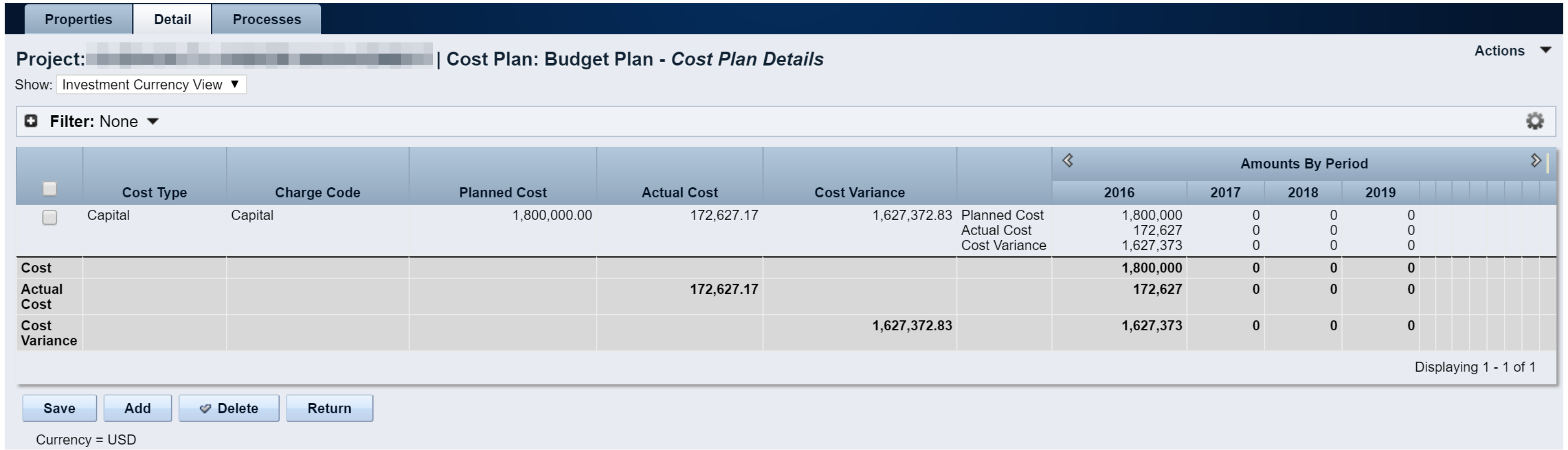
Resource	ID	Period Start	Timesheet Status	Adjusted	Adjustment	Total
	4863719	3/27/16	Submitted			43.00
	4314233	3/27/16	Open			0.00
	4863469	3/27/16	Open			0.00

Financial Management Domain

The financial management domain will only show data that is on the cost, benefit, and budget plans.

The following data in CA PPM is available in the financial management domain





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Accessing Advanced Reporting

✓ Advanced Reporting Navigation

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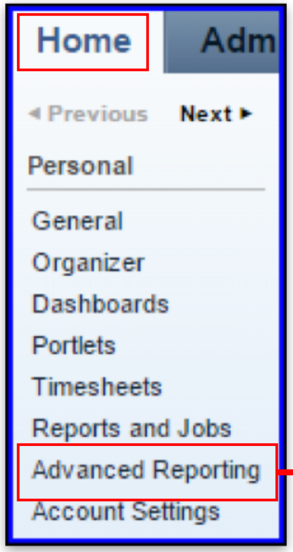
Navigation

- *The ability to navigate to and within Advanced Reporting is based specific security rights.*

  Note: Some functions may not be available based on advanced reporting security rights displayed on next page.

- **Home > Advanced Reporting**



Jaspersoft Security

Right	Description	Notes
Advanced Reporting: Ad Hoc Create	Allows resource to navigate to the Advanced Reporting page and create Ad Hoc Views. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_ADHOC_DESIGNER.	Required for Ad Hoc reporting. **Note**: Domain access is required to enable create rights.
Advanced Reporting: Administer	Allows resource to navigate to the Advanced Reporting page and administer Advanced Reporting. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_ADMINISTRATOR.	By default this is the CA PPM Administrator.
Advanced Reporting: Dashboard Create	Allows resource to navigate to the Advanced Reporting page and create Dashboards. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_DASHBOARD_DESIGNER.	To create a dashboard users add reports to the dashboard. Domain access is required to create reports.
Advanced Reporting: Data Source Create	Allows resource to navigate to the Advanced Reporting page and create Data Sources. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_DATASOURCE_DESIGNER.	Set to Admin account by default. This is for advanced users who will create new data sources.

Jaspersoft Security (2)

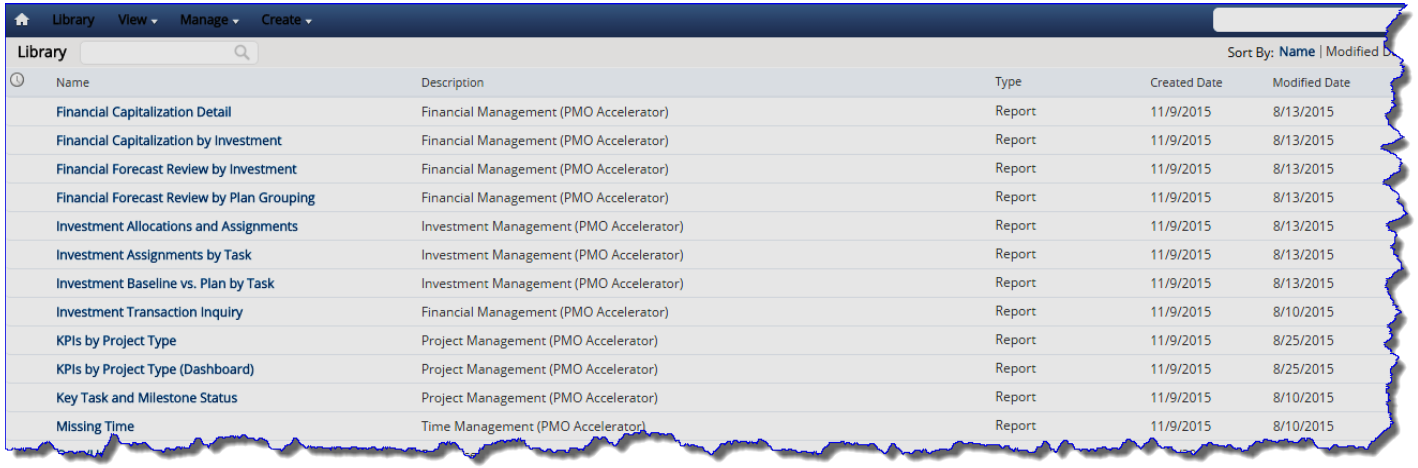
Right	Description	Notes
Advanced Reporting: Domain Create	Allows resource to navigate to the Advanced Reporting page and create Domains. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_DOMAIN_DESIGNER.	Set to Admin account by default. This is for advanced users who will create new domains.
Advanced Reporting: Navigate	Allows resource to navigate to the Advanced Reporting page. Resource is assigned JasperSoft role as ROLE_USER.	By default all users inherit this right , ***but*** CA PPM navigation rights are also required.
Advanced Reporting: Report Create	Allows resource to navigate to the Advanced Reporting page and create Reports. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_REPORT_DESIGNER.	Domain access is required to create reports.

Advanced Reporting Menu Structure

	Library	View	Manage	Create
When selected the Advanced Reporting main page displays	Displays an alphabetical listing of the out of the box reports available in CA PPM.	Drop down menu that provides additional options:		
		• Search Results	• Organizations	• Ad Hoc
		• Repository	• Users	• Report
		• Messages	• Roles	• Dashboard
		• UI Samples		• Domain
				• Data Source

Library Menu

- The Library offers a more focused set of ad hoc views, reports and dashboards.
- Search features provides the ability to narrow the list to a specific set of data.
- Each item displays the Created Date and Modified Date.
- From the Library ad hoc views, reports and dashboards can re run and scheduled.



Library View Manage Create

Library

Sort By: Name | Modified

Name	Description	Type	Created Date	Modified Date
Financial Capitalization Detail	Financial Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Financial Capitalization by Investment	Financial Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Financial Forecast Review by Investment	Financial Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Financial Forecast Review by Plan Grouping	Financial Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Investment Allocations and Assignments	Investment Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Investment Assignments by Task	Investment Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Investment Baseline vs. Plan by Task	Investment Management (PMO Accelerator)	Report	11/9/2015	8/13/2015
Investment Transaction Inquiry	Financial Management (PMO Accelerator)	Report	11/9/2015	8/10/2015
KPIs by Project Type	Project Management (PMO Accelerator)	Report	11/9/2015	8/25/2015
KPIs by Project Type (Dashboard)	Project Management (PMO Accelerator)	Report	11/9/2015	8/25/2015
Key Task and Milestone Status	Project Management (PMO Accelerator)	Report	11/9/2015	8/10/2015
Missing Time	Time Management (PMO Accelerator)	Report	11/9/2015	8/10/2015

View Menu

The View menu displays:

- **Search Results**: provides a way to quickly filter and look for specific reports using key words or pre-defined filters.
- **Repository**: displays folders where reports can be saved.
  - *Shared Folder* is the location where all Advanced Reporting users can save, view and use reports.
  - *Named User Folder* is where each individual can save their reports for their use only.
- **Messages:** provides basic information about a report and when selected will provide message details.
- **UI Samples:** **For Administrator Use Only**

Manage Menu

The Manage menu displays:

- **Organizations:** displays information pertaining to the organizations instance of JasperSoft Reporting.
- **Users:** displays a list of folders where reports can be saved.
  - *Shared Folder* is the location where all Advanced Reporting users can save, view and use reports.
  - *Named User Folder* is where each individual can save their reports for their use only.
- **Roles: For Administrator Use Only**

Create Menu

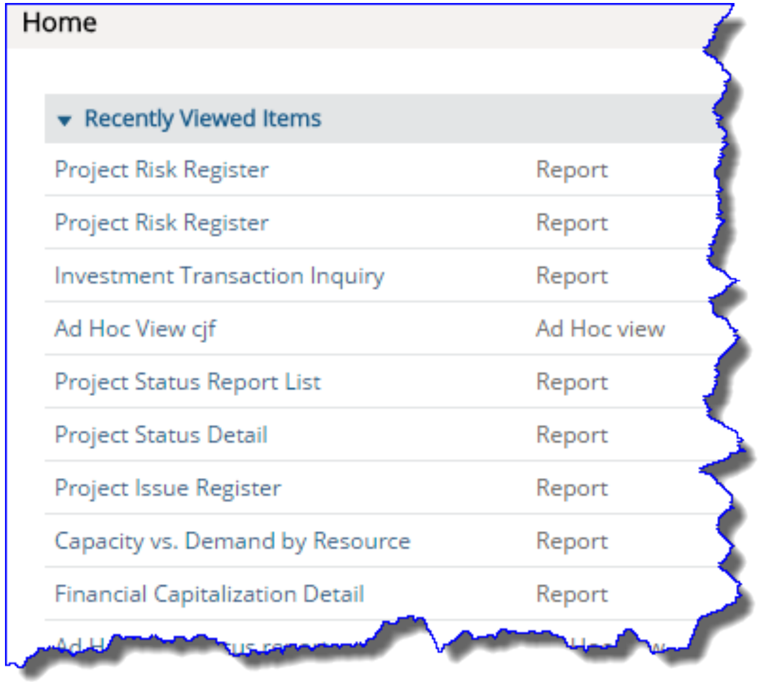
The Create menu displays:

- **Ad Hoc Views:** is a link to create an ad hoc report.
- **Report:** provides the user with a simple way to access the shared or named user folder to run any saved report.
- **Dashboards:** is a link to where a dashboard report can be created.
- **Domain: Administrator Use Only**
- **Data Source: Administrator Use Only**

Advanced Reporting Home Screen

The Home screen has two sections:

- **Recently Viewed Items:** displays linkable list of those reports that were viewed by the logged in user.
- **Advanced Reports Security Rights:** allows the user to view various options on the Home screen.
- **Click on Create or View List** under the appropriate section.



Administrators

Admin

Data Sources Or Domains

Functional Users

Reports

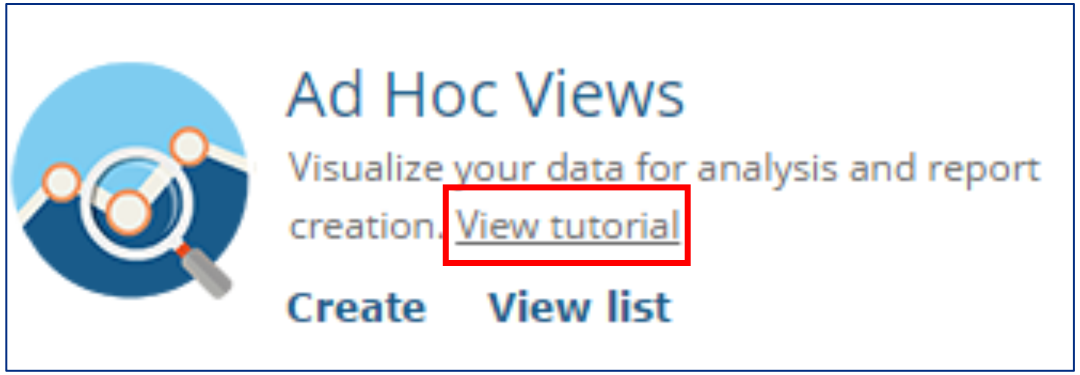
Ad Hoc Views

Dashboards

Tutorials

Advanced Reporting provides access to video tutorials which provide end users with information on the basics of creating Ad Hoc Reports, Dashboards and Running of Reports.

Click the **View Tutorial link** under the desired area from the Advanced Reporting Home page. In this example we are accessing the link via Ad Hoc Views.



Exercise 1

Navigation

Part One: Navigating to the Report Library

1. **Log on** to CA PPM
2. **Home > Advanced reporting**
3. Select the **Library** Link on the menu bar
4. In the **Search** box enter: **‘project storyboard’**.
5. Click the **Magnifying glass icon** to search.
6. The **Project Storyboard** report is displayed.
7. **Hover** over the **Report** link. CA PPM displays the **name and path** of the report.
8. If the report was scheduled to run there would be a **Clock Icon in the far left column**

Part Two: Navigating the Repository

1. Click on the **View** menu
2. Click on **Repository**
3. The **Folder** section on the left when expanded display the various folder structures where views, reports and dashboards are saved.
4. Navigate to the **Repository search field** (top right)
5. In the **Search** box enter: **'Project'**.
6. Click the **Magnifying glass icon** to search.
7. All the report components that contain the word project are displayed: including input controls, views, content resources, reports, queries and domains. These are all the different components associated with Advanced Out-Of-The-Box (OOTB) reports.

   Note: The library displays reports while the repository displays reports and associated components.
8. On the left hand margin is **Filters** where the information can be further refined based on **Available, Type, Time** accessed, **Scheduled**

Running a Report

✓ Accessing and Running an Out-of-the-Box (OOTB) Report

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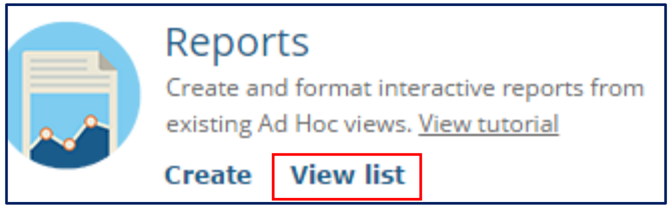
Accessing Reports

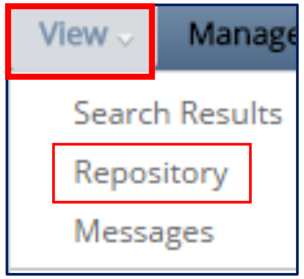
Reports can be accessed three ways:

- **Advanced Reporting Menu > Library**

- **Advanced Reporting Home Page > Reports Icon > View List**



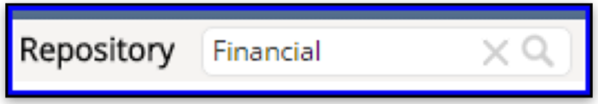
- Click **View > Repository**

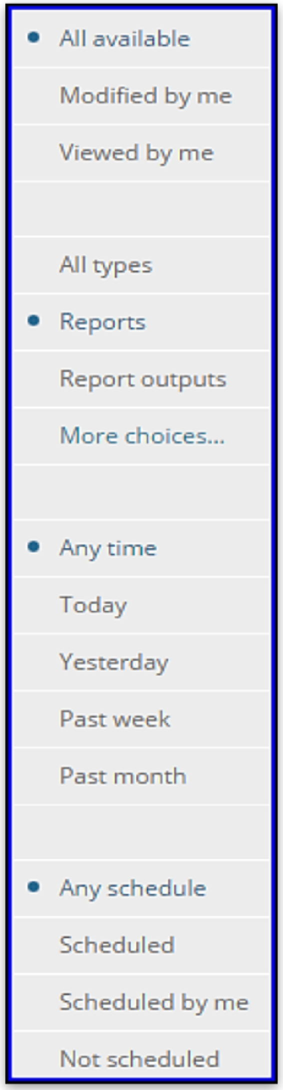


Report Section

The Report section displays an alphabetical listing of the reports that are available.

- **Filters** provide the user with the ability to utilize a predefined set of criteria to find a report easily:
  - Modified by Me; Viewed by Me; Accessed Today, etc.
- **Search** to locate report(s) containing specific word(s).

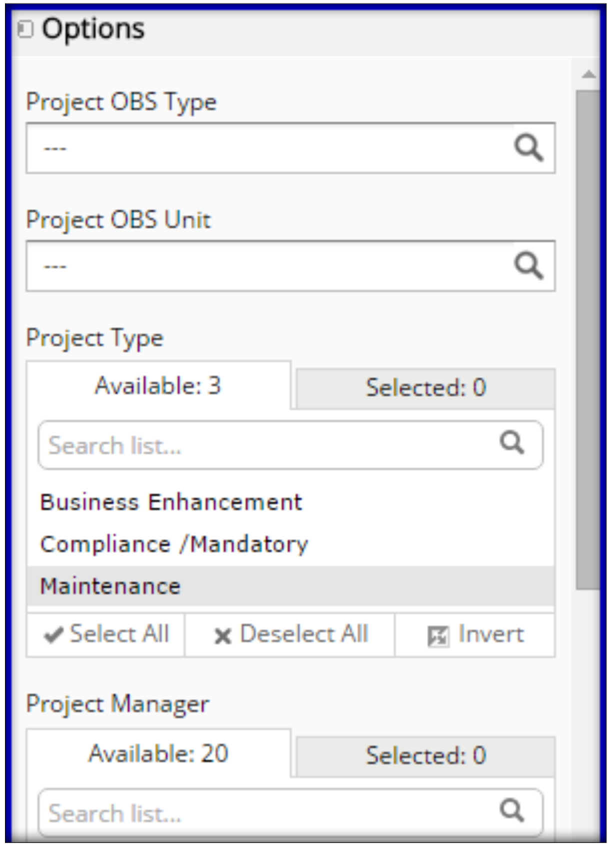




Running a Report

When a Report is selected from the list the report screen will display without results.

- **Options** (report parameters) must be defined to render results.
- Use the **Browse** (binoculars) to select desired options.
- Browse fields also have auto-suggest functionality.
- After you have defined option criteria, click **Apply** to return results.



Report Menu Structure

Navigates to the previous screen.


Save the report if changes were made.


Save the report in a different format: PDF, XLS, XLSX, CSV, DOC X, RTF, ODT, ODS, or PPTX.


Undo, Redo or Undo All changes.

Zoom In or Out.

Search Report provides the ability to search the report for specific text. Text will highlight in yellow. Drop-down options include Case Sensitive or Whole Words Only.

Navigation to various page(s) found in report by page or by arrows (single or multiple page forward and / or back)

Exercise 2

Running a Report

Part One: Running a Report

1. Click on the **Library** Link
2. In the **Search** box enter: **KPI**
3. Click the **Magnifying glass icon** to search.
4. Select the **‘KPIs by Project Type (Dashboard)** link.
5. The report will load into view, but no data will display until the report criteria is further defined

Part Two: Working with Report Menu Structure

1. Navigating to **Options** section to review filters.
2. Click the **Binoculars (Browse) icons** to view the various options available.
3. Select **Major Project** under the **Project Type** field.
4. Click **Apply** to display the report.
5. Utilize the **Plus and Minus** icons to zoom in and out.
6. Type **Alignment** into the **search field**
7. Click on the Click the **Magnifying glass icon** to search.
8. **Alignment** will become **highlighted** in yellow.
9. Click the **drop down next to the search field**, notice that you can search by Case Sensitive, and Whole Words Only.
10. **Hover the Mouse over the Save icon** to view Save or Save As.
11. **Hover the Mouse over the Export icon** to see the various export options.

Part Three: Saving your Report

1. Click the **Save as type icon**  to view the different file types.
2. Select **'Save as‘**.
3. To name your report, **add your initials to the end of the report name** (i.e. KPIs by Project Type (Dashboard ABC).
4. Locate the **Users folder**
5. Select the folder for your **Training ID**.
    1. There are three additional folders within your main folder: Ad Hoc Components, Dashboards, and Reports.
    2. **Highlight the Reports folder** and click the **Save** button.
6. A **message** indicating the report was saved is displayed.
7. Return to the library.
8. **Type your initials into the Search window and click the Magnifying Glass** to search. Your report is displayed.

Running an Ad Hoc Report

✓ Accessing and Running an Ad Hoc Report

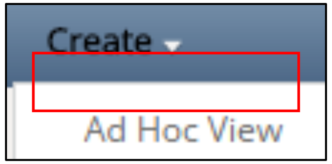
Ad Hoc Views

- The Ad Hoc Views editor supports the creation of various formats of reports for your Projects or Portfolios:
  - Table
  - Cross Tabs
  - Charts
- Users have the ability to include field summaries, define a set of predefined filters, sorting and other field formatting options.
- The reports are created using Click or Drag and Drop.
- Reports can be saved to a users individual folder or to a shared folder.
- Reports can be scheduled to run based on the frequency established by the user.

Accessing Ad Hoc Views

Ad Hoc Views can be accessed two different ways:

- **Advanced Reporting Home Page > Ad Hoc Views Icon > Create**
- Select **Ad Hoc View** from the **Create** drop-down on the menu bar.



The Select Data window will display the available ***Domains*** (see next slide).

Domains

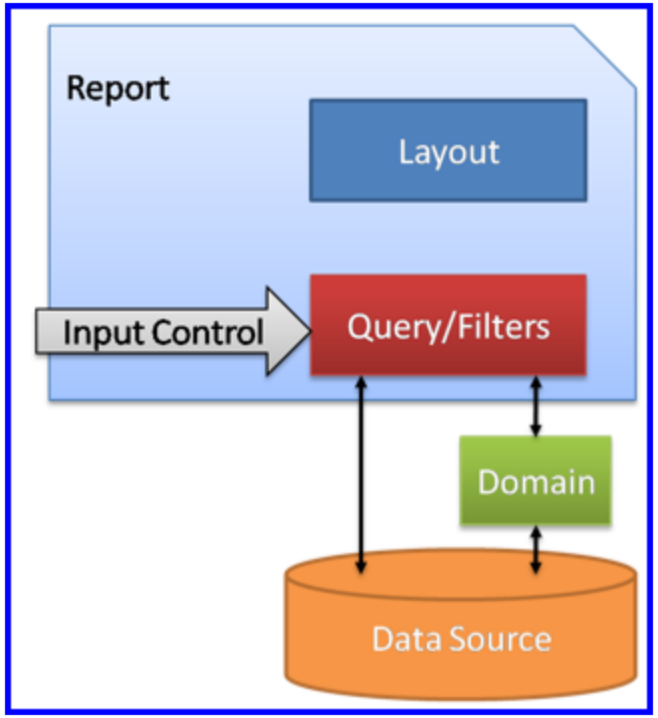
Domains are a specific set of CA PPM components that are related to the modules in CA PPM. A Domain provides a business view of the CA PPM Data Warehouse.

- Out of the Box Domains are:
    - Application Management
    - Custom Master Objects
    - Financial Management
    - Idea Management
    - Investment Management
    - Project Management
    - Resource Management
    - Time Management
- Ad Hoc reports require the selection of a single **Domain** from which the CA PPM fields related to that domain are housed.

Domains (2)

Domains are organized hierarchically into Sets and Items:

- Sets act like a folder that can be expanded to view the items.
- Items include fields and measures.
  - Fields are the qualitative information.
  - Measures are the quantitative information.



Selecting a Domain

In order to create an Ad Hoc report the user must select **ONE** domain.

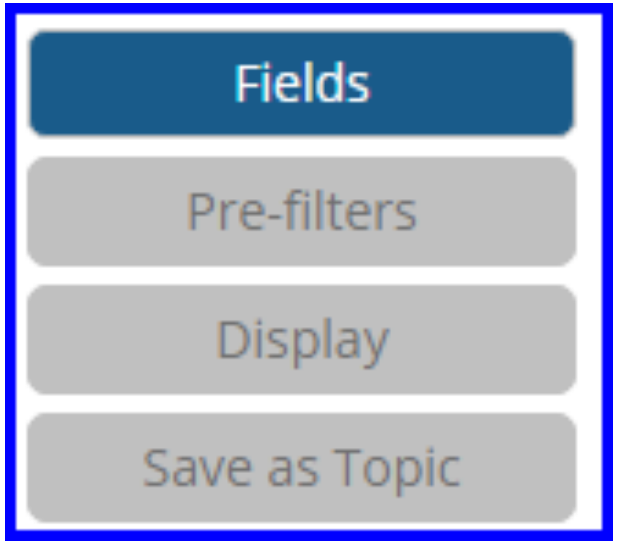
- **Note:** Advanced Reporting does not allow the selecting of more than one domain.
- Administrators can develop custom domains to include components from different domains or custom objects.
- Once a domain is selected the Choose Data button will become active.

Choose Data - Window

– **Save as Topic**

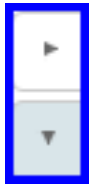
The Ad Hoc choose data screen will display three main sections.

- The first section is a set of four action buttons.
  - **Fields** allow users to select the fields from within the Domain selected.
  - **Note**: It is not recommended that you select the entire set of fields within a Domain.
  - **Pre-Filters** provides the user the opportunity to define filter criteria so that unwanted or needed data is not pulled into the view when created.
  - **Display** allows the user to change the layout of the report by re-ordering fields or renaming the headings.
  - **Save as Topic**



Choose Data - Fields

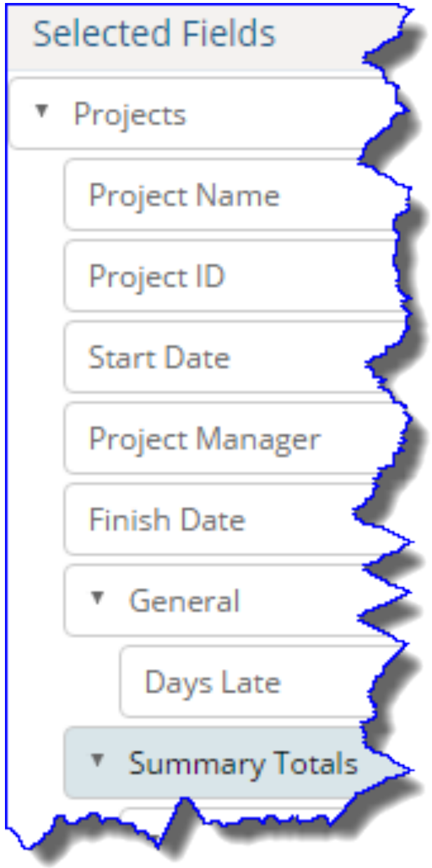
The second section is where the Domain fields are identified and selected.



Clicking on the arrows to the left of a listed Items will expand or collapse the hierarchy of components.

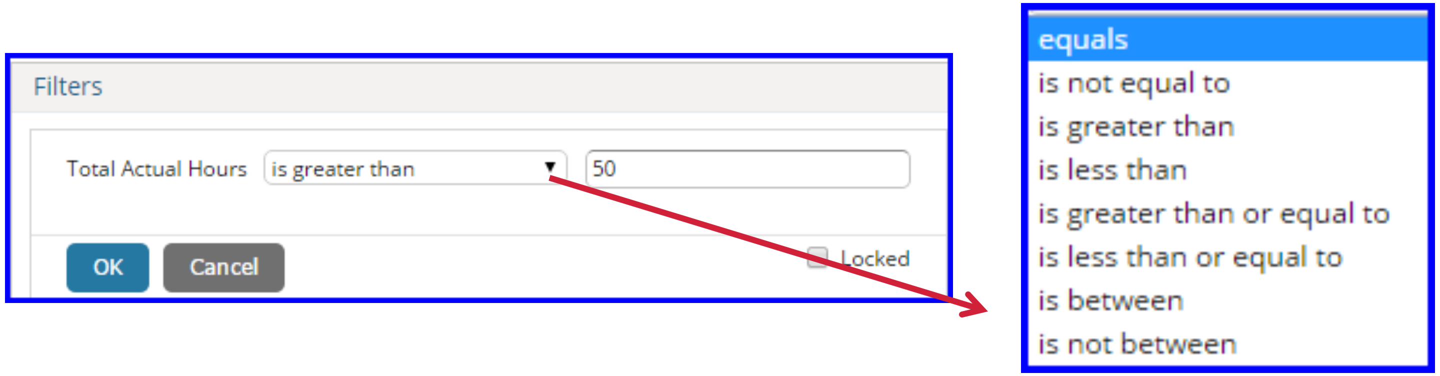
When a component is identified the user can double-click or use the arrows to move the component into the selected fields section.

Any unwanted items can be removed using the arrows.



Pre-Filters

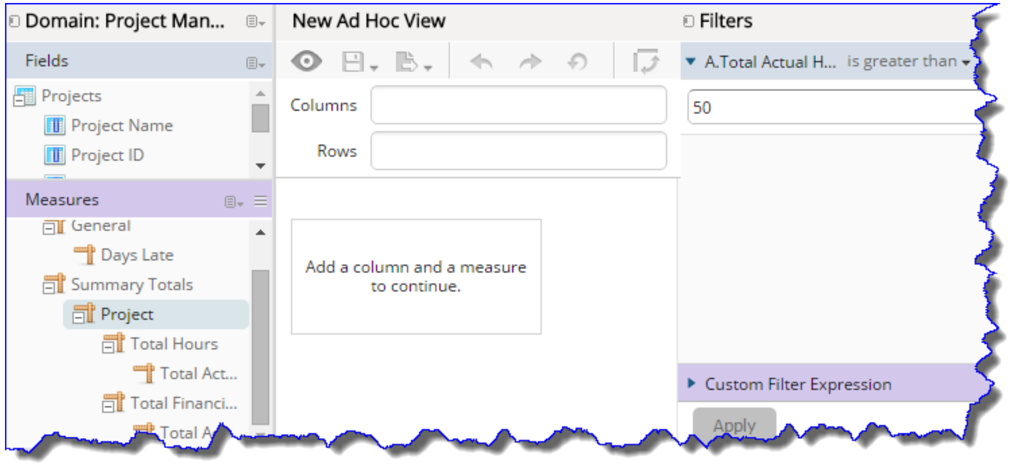
- **Pre-filters** allow the user to select filtering criteria to populate the report with specific types of data.
- **Select the data field(s)** for the filter and use the drop-down to select the criteria. Then **populate the data field**.
  - **Note**: Options may vary based on item(s) selected.
- Once an item has been selected and the parameter entered, click **OK**.
- *Repeat this step* to add additional data elements.
- Click **OK** to finish.



Layout of the View

The Layout page displays five sections:

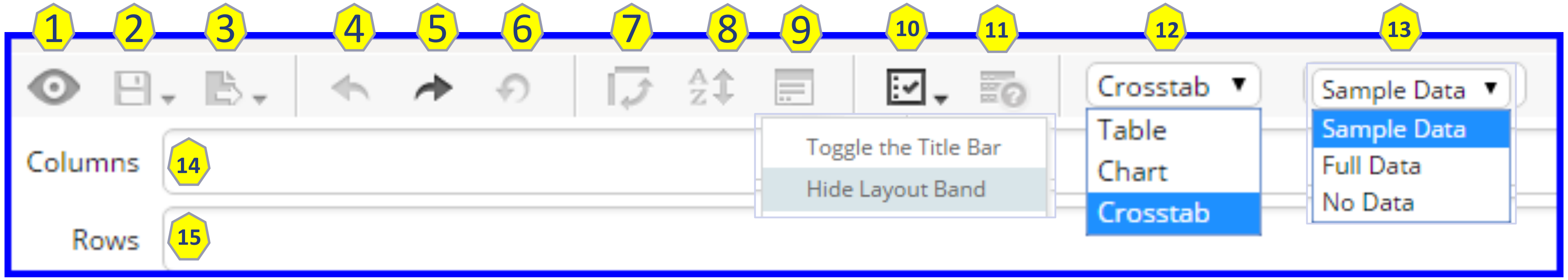
- Fields (components) that were selected from the domain.
- Measures which are fields (components) that contain calculated fields.
- New Ad Hoc View screen where the layout of the view is created.
- Filter section that display the pre-defined filters and where other filters can be added.
- Custom Filter Expression



Layout of the View (2)

The Ad Hoc view section menu section contains the following functions:

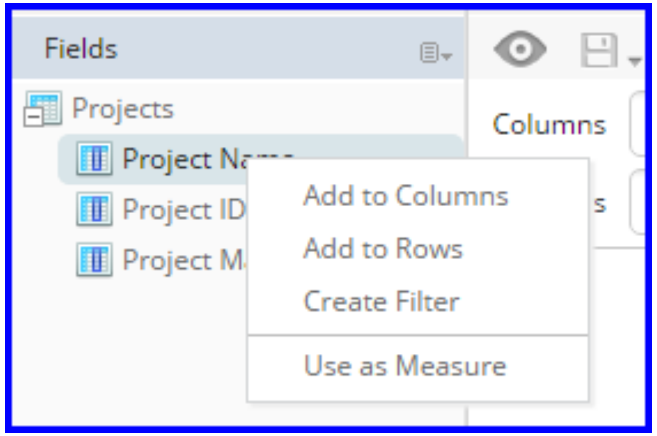
1. Toggle between design and display modes
2. Save
3. Save As
4. Undo the Last Change
5. Redo the Last Change
6. Reset the report to the last saved state
7. Switch the Groups
8. Set the Sort Order
9. Change the Input Values
10. Toggle Title Bar / Hide Layout Band
11. View SQL Query
12. Type of View
13. Type of Data
14. Columns
15. Rows



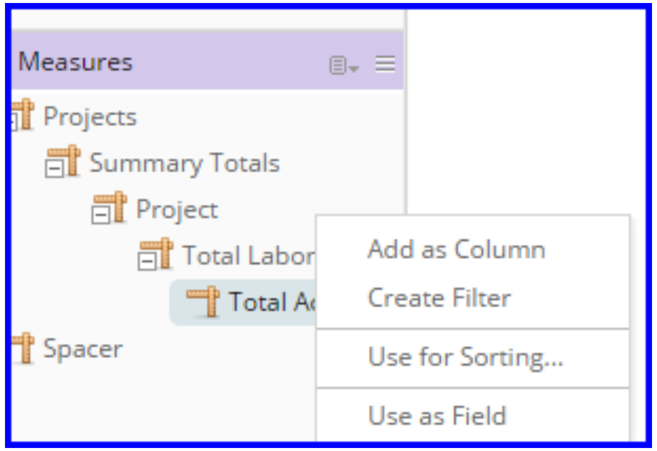
Layout of the View (3)

The Fields selected from the Domain will display on the left side of the screen.

- Right-clicking on a component in the **Fields** section will provide options to Add to Columns, Add to Rows, Create Filter or Use as Measure on the view.



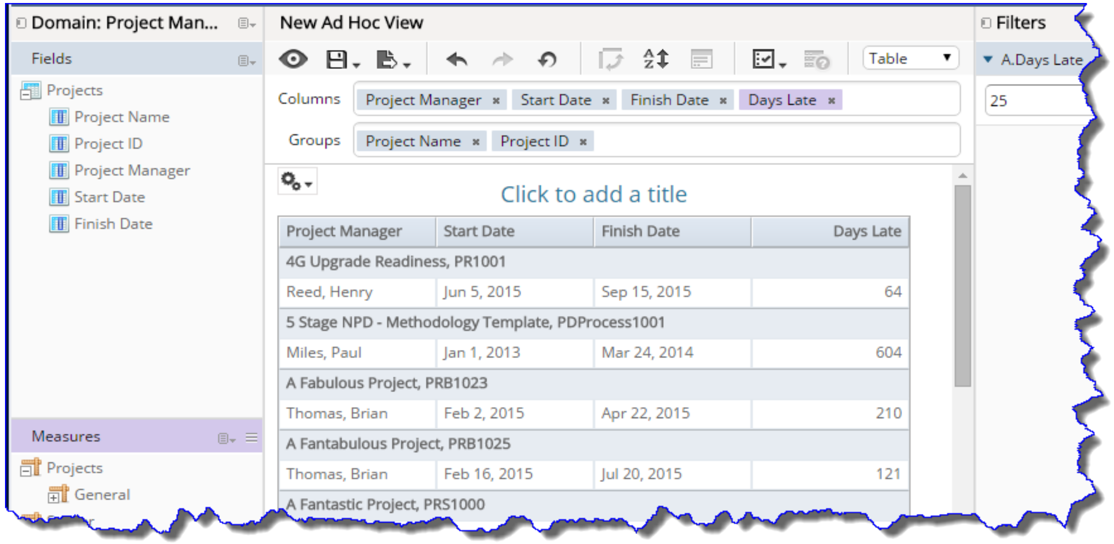
- Right-clicking on a component in the **Measures** section provides the options to Add as a Column, Create Filter, Use for Sorting or Use as Field.



Layout of the View (4)

To create the View Layout: **Choose the report type** (Table, Cross Tab or Chart), then **double click the field(s) or measure(s)** into either the **Columns or Group** of a Table View.

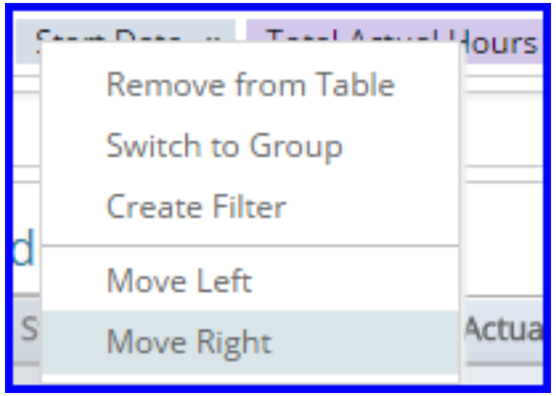
- Double-clicking on the Component will add the Component into the Column Field. The Component can be dragged into the Group field or moved into a different order.
- Sample Data results will populate immediately.



Layout of the View (5)

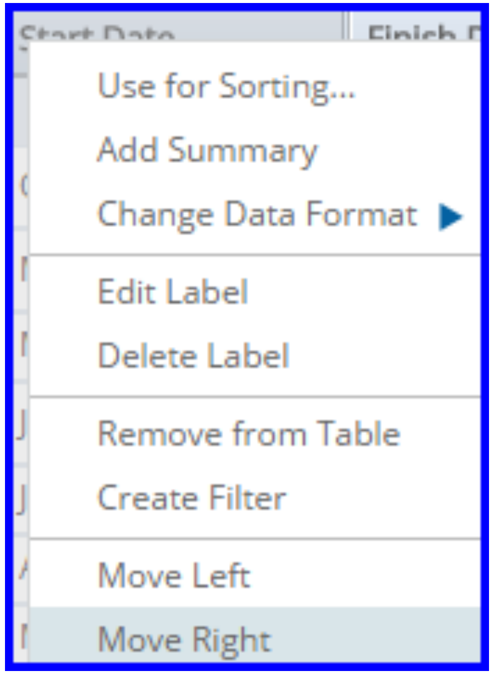
Once the Components have been added into a Column, Group or View additional options are available by right-clicking on the component.

<u>Column/Group</u>



/Column

<u>Data</u>

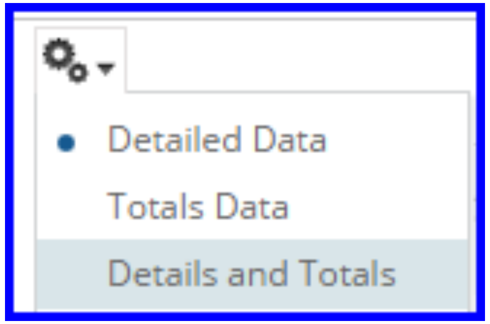


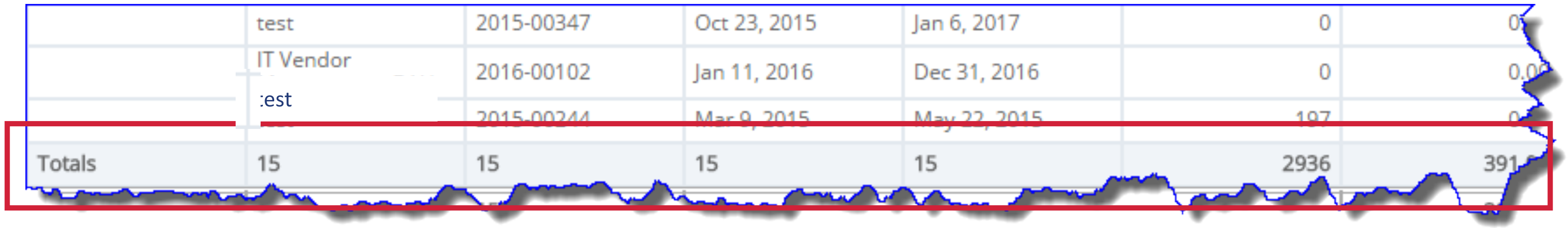
Layout of the View (6)

A Title for the report can be created by selecting *Click to add a title.*

The View section also allows for the data to be displayed as a Detailed Data, Totals Data or Details and Totals.

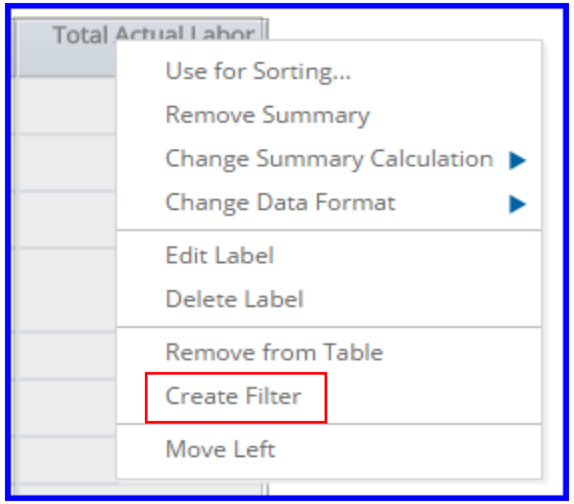
- If using Details and Totals, a Totals column will be added and values aggregated at the bottom of the view.

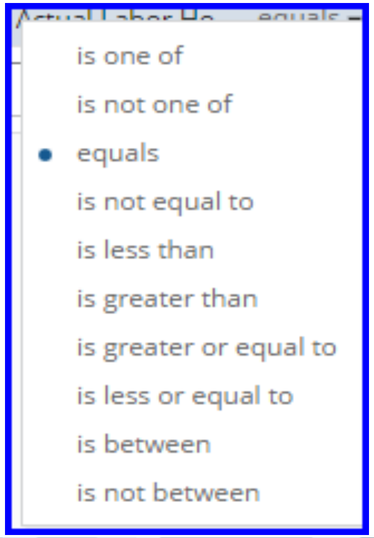




Working with Filters

- The filters panel will display any pre-filters defined at the onset of report creation.
- Additional filters can be added by right clicking on the item and selecting **Create Filter**.
- Once the field displays in the Filters section, you can define the criteria.
- Click **Apply** to view filtered results.
- **Note**: Multiple filters can be applied to a view.





Exercise 3

Create Ad Hoc Report

Part One: Choosing the Domain

1. Logon to **CA PPM**.
2. **Select Advanced Reporting.**
3. Click on **Create** drop-down.
4. Choose **Ad Hoc View**.
5. The **Select Data** window displays.
6. Click on **Project Management**.
7. Click on the **Choose Data** button.
8. The **Data Chooser** Page is displayed.

Part Two: Adding Data Fields

1. Expand **Projects** by clicking on the arrow to the left of Projects
2. Double Click on **Project Name**
3. Double Click on **Project Manager**
4. Double Click on **Project ID**.
5. Double Click on **Status**
6. Double Click on **Progress**
7. Double Click on **Stage**
8. Double Click on **Is Active**
9. Double Click on **Is Template**
10. Double Click on **Start Date**
11. Double Click on **Finish Date**
12. Locate and expand the **OBS Set**
13. Add **OBS Path**

Part Three: Creating Pre-Filters

1. Click on the **Pre-Filters** button to display the Pre-Filters page
2. Expand the **Project Set**
3. Expand and Double Click on **Is Active** to the **Filters section**
4. Click the **Filters drop-down** to view the possible filtering options, select: **‘equals’**
5. Add a **1** to filter for only active projects
6. Expand and Double Click on **Is Template** to the **Filters section**
7. Click the **Filters drop-down** to view the possible filtering options, select: **‘equals’**
8. Add a **0** to filter for no template projects

Part Three: Creating Pre-Filters, cont.

9. Notice the **Locked Flag**
    1. Note: If a value was chosen from the drop-down and this flag set, the filter would be locked and only projects matching these criteria would be displayed.
    2. **Leave blank** for this exercise. Click **OK, and the Filter will be listed in the view.** Additional filters could be added if necessary
10. Click **Display** to open the **'Customize the Display**' window which allows the moving of items into a particular order if desired
11. Click the OK Button at the bottom of the screen

Part Four: Building the View

1. **New Ad Hoc View** displays
    1. Note: The Project Management domain is located on the left side of the screen
2. Click on the down arrow to the right of where it says **Crosstab** at the top of the screen
3. Select **Table**
4. **Mouse Hover over the Domain name paper icon drop-down**. This icon allows you to change the data source or select different fields
5. Expand the **Projects +** sign to display the selected **Fields** such as Project Name and Project Manager
6. **Mouse Hover over the Fields paper icon drop-down**. This allows creation of a calculated field.

Part Five: Creating Calculated Measures

1. Click on the icon across from the Fields banner
2. Click on **Create Calculated Field**
3. **New Calculated Field** window displays
4. Enter **New Measure Name: ‘Project Duration’**
5. In the Functions section locate and double click on **ElapsedDays** function
   a) Double clicking will populate the Formula box with the expression
6. **Highlight** the DateFieldName1 expression in the formula section between the quote marks.
7. Within the Fields and Measures section locate and select Finish Date
8. Double Click on Finish Date which will replace the highlighted part of the formula expression.
9. Highlight the **DateFieldName2** expression in the formula section between the quote marks..
10. Within the **Fields and Measures** section locate and select **Start Date**
11. Double Click on **Start Date** which will replace the highlighted part of the formula expression.

Part Five: Creating Calculated Measures

12. Click Validate to validate the expression.
    a) Note: To the right of the Validate Button it will display the status of the Validation.
    b) If the expression was done correctly it will indicate Validation Successful.
    c) If the expression was not properly entered and error message will display to the right of the Validation button and the Formula section will become red.
13. Click Create Field button to create the measure.
    a) A message will display at the top of the screen that the Field has been added.
14. The new Calculated Field will display under the Fields section.

Part Six: Building the View Layout

1. **Double Click** the following items to the **Columns** row:
    1. **Project Name**
    2. **Project ID**
    3. **Project Manager**
    4. **Status**
    5. **Progress**
    6. **Stage**
    7. **Start Date**
    8. **Finish Date**
    9. **OBS Path**
2. **Double Click** on **Project Duration** in the Fields section (this is your calculated field)

Part Seven: Add a Title

1. Select **Click to add Title**
2. Enter: **‘Project Listing’ followed by your initials**

Part Eight: Additional Formatting

1. **Right Click** on the column heading to view the different options available
   1. Use for Sorting
   2. Add Summary
   3. Change Date Format
   4. Edit Label
   5. Delete Label
   6. Remove from Table
   7. Create Filter
   8. Move Right
   9. Move Left
2. **Right Click** on the **Project Name** and choose **create filter**. A new filter is added to the filter section on the right
3. In the new filter, **change** the **'equals'** view to **'is one of'** in the filter dropdown arrow
4. Click on **Deselect All** at the bottom of the **Project Name** filter
5. Locate and Click on **Nana's Great Project** in the list of project names
6. Click the **Apply** button at the bottom of the filter section

Part Nine: Hiding Display Title bar and Layout Bands

1. **Click the Toggle Title bar / Hide layout** icon 
2. Click on **Hide Layout Band**
3. Click on **Table**
4. **Click** on the drop down to the right of **Sample Data** to view the options: Full Data / Sample Data / No Data which is used to manipulate the amount of data that is returned during report design

Saving and Accessing a Saved Ad Hoc View/Report

- ✓ Saving an Ad Hoc View/Report
- ✓ Accessing a saved View/Report

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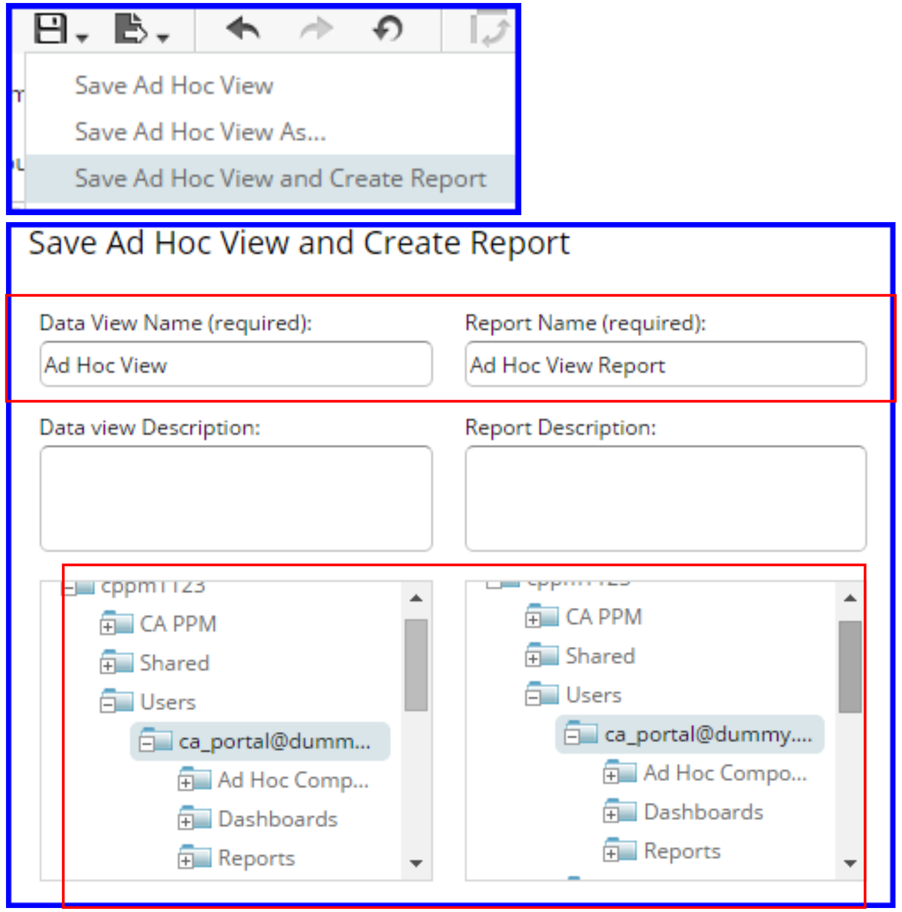
Saving a Report

There are three ways to save the view/report:

- Save Ad Hoc View
- Save Ad Hoc View As
- Save Ad Hoc View and Create Report

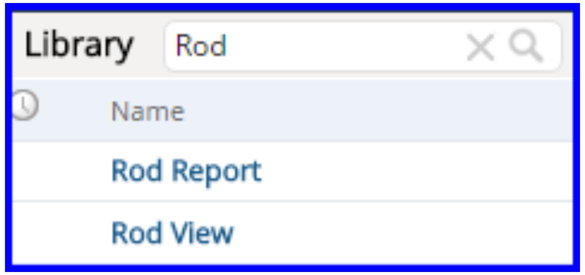
- Enter Data View Name and Report Name fields (required)
- Select the appropriate folder for the view and report .
- Click Save.
- Once saved the following message will be displayed.



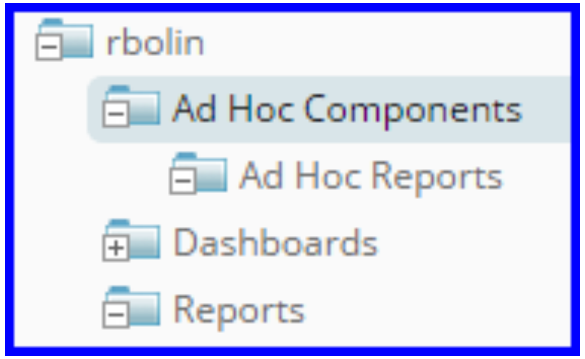
Accessing a Saved Report

Accessing a saved view/report can be accessed via:

- Library:
  - Enter search criteria.
  - Click on the view/report.



- Repository
  - Locate and expand the User folder
  - Click on Ad Hoc Reports or Reports
  - Click on the View or Report that populates to the rights of the folders section.



Exercise 4

Saving a Report

Part One: Saving the Ad Hoc View as a Report

1. **Hover over the Save icon** and select **Save Ad Hoc View and Create Report**
2. The **Save Ad Hoc View and Create Report** Window opens
    1. *The left side of the screen is for saving the view while the right side is for saving the report*
3. **Type Project Financials** and **your initials** into the Data View name
4. **Type Project Financials** and **your initials** into the Data Report name
5. In the **folder structure for the *view* navigate to the users, Training ID, Ad Hoc Components**
6. In the **folder structure for the *report* navigate to the users, Training ID, Reports**
7. Click **Save**

Part Two: Viewing your Report

1. **Navigate to the library**
2. **Enter your initials as the search criteria and click the Magnifying Glass** icon. Your report and view will display
3. **Click on the report** to open

Part Three: How to format your report

1. **Navigate to the library**
2. **Enter your initials as the search criteria and click the Magnifying Glass** icon. Your report and view will display
3. **Click on the report** to open
4. **Right-Click on the column <u>duration</u>** to bring up the options
5. **Select the column options and then "Formatting"**
6. **Format Column Interface will appear**. Modify the font type by selection a new type if the section "Font:"
7. **Select the tab** Conditional Formatting
8. **Click the Add link**
9. **In the Operator** select "Greater Than"
10. **In the Condition** select 50
11. **In the format** select the A (for font color) and change to a Red
12. **Click Ok**
13. **Values** in the report on the column duration should now be red if above 50

Creating a Cross Tab View

✓ Creating a Cross Tabbed Report

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Create a Cross Tab Report

- Cross Tab Views (similar to a pivot table) is the grouping of data in rows by one field and in columns by another field.
- For a Cross Tab View to function properly it must contain a measure as either a row or column.

Note: Measure(s) cannot be in both a column and a row in the same Cross Tabbed View.

	Month	Apr-14	Apr-15	Aug-14	Aug-15	Dec-13
	Measures	Total Actual Labor Hours	Total Actual Labor Hours	Total Actual Labor Hours	Total Actual Labor Hours	Total Actual Labor Hours
Project Name	Project Manager					
[illegible]	Totals		76.50		76.50	
[illegible]	Totals	237.25	237.25	237.25		
[illegible]	Totals		24.00	24.00		
[illegible]	Totals			46.00		
[illegible]	Totals	99.50	99.50	99.50		99.50
[illegible]	Totals	16.00		16.00		
[illegible]	Totals		133.50	133.50		
[illegible]	Totals		2,777.52		2,777.52	
Totals	Totals	352.75	3,348.27	556.25	2,854.02	99.50

Exercise 5

Creating a Cross Tab Report

Part One: Select Domain

1. Select **Advanced Reporting**
2. Click on the **Create Drop Down**
3. Select: **Ad Hoc View** to open the data chooser window
4. Select **'Domains'**
5. Select **Resource Management**
6. Click on the **Choose Data** button
7. The **Select Fields** page of the data chooser is displayed

Part Two: Choosing Data Fields

1. Expand the **Resource** data set
2. Add **Resource Name** to the selected fields
3. Expand **Calendar Periods** set
4. Select **Month End Date**
5. Expand **Hours**
6. Add **Available Hours**
7. Add **Allocated Hours**
8. Add **Actual Hours**
9. Click **OK** button

Part Three: Building the View

1. Double Click on **Resource Name** to add to the **Rows** field.
2. Expand the **Calendar Periods** set under the **Fields** section.
3. Right Click on **Month End Date**
4. Select **Add to Columns**
5. **Expand Resources** under the **Measures** section until the values under **Hours** displays
6. Add **Available Hours** to Columns
7. Add **Allocated Hours** to Columns
8. Add **Actuals Hours** to Columns
9. **Right Click** on **Month End Date**
10. Select **Create Filter**
11. Change **Equals** to **Is Between**
12. Using the Calendar to the right of the date fields select **September 30, 2015 to February 29, 2016**
13. Click the **Apply** button at the bottom of the screen

Part Four: Changing the layout of the view

1. Right Click on the Month End Date heading to display the options.
2. Click on Change Grouping
3. Select Month
4. New Month End Date will now display.
5. Right click on Available Hours in the Columns section.
6. Click on the Switch to Row Group which will move all the measures to rows for each resource.

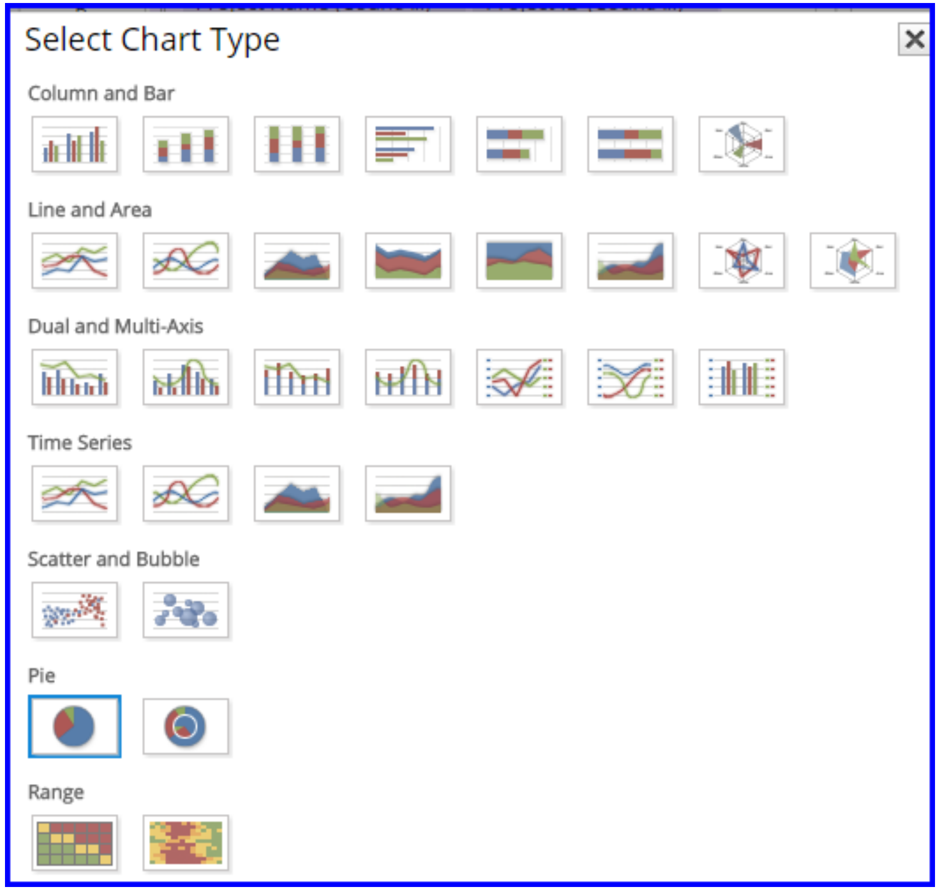
Creating a Chart

✓ Creating a Chart

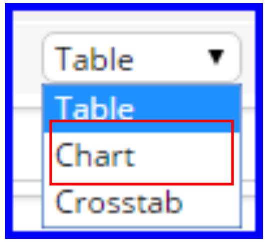
Creating Charts

Charts are a flexible way to see data graphically.

- Column and Bar
- Lines and Area
- Dual and Multi-Axis
- Time Series
- Scatter and Bubble
- Pie
- Range



Creating Charts (2)

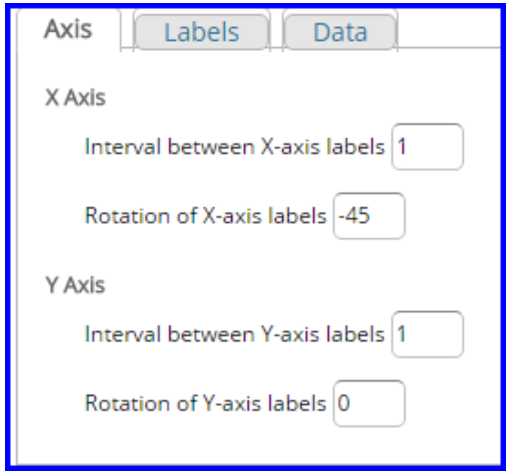


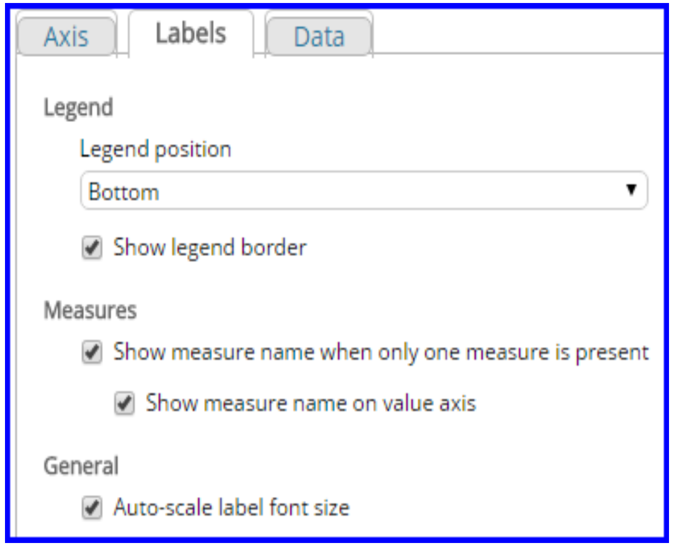
- From the Ad Hoc View menu **select Chart** from the drop-down menu.
- The system default is to create a Column Graph.
- **Click on the**  **Icons drop-down**. The type of chart can be modified or the chart can be future formatted.

Creating Charts (3)

Chart Formatting contains three tabs

Axis Label Data





Exercise 6

Creating a Chart

Part One: Select the Domain

1. Select **Advanced Reporting**
2. Click on the **Create Drop Down**
3. Select: **Ad Hoc View** to open the data chooser window
4. Select **Project Management** in the **Select Data** window
5. Click on the **Choose Data** button
6. The **Select Fields** Page of the data chooser is displayed

Part Two: Choosing Data Fields

1. Expand the **Project** data set
2. **Navigate Summary Totals Set > Project Set > Total Hours Set**
3. Add **'Total Actuals'** to the selected fields
4. Add **'Total Allocations'** to the selected fields
5. Navigate to the **General Set**
6. **Select Stage**
7. **Select Goal**
8. Click **OK** button
9. Click on the drop down arrow to the right of **Crosstab** and select **Chart**

Part Three: Building the View

1. Expand the **Measures** section until all the **Total Hours** set displays
2. Double Click on **Total Actuals and Total Allocations** to add to the **Columns Header**
3. Expand the **General** set under the **Fields** section
4. Double Click on **Goal** to the **Rows** section

Part Four: Select Chart Type

1. Click the **Gears Icon drop down** to view the possible chart types
2. Select **Pie Chart**
3. Exit out of the Chart Type window

Part Five: Use the Filter

1. Locate the **Data Level Filter** on the right side of the page
2. **Move the slider** to view how the chart changes
3. In the Legend, select different items to toggle on and off

Creating a Dashboard

- ✓ Creating a Dashboard Report

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Let Rego be your guide.

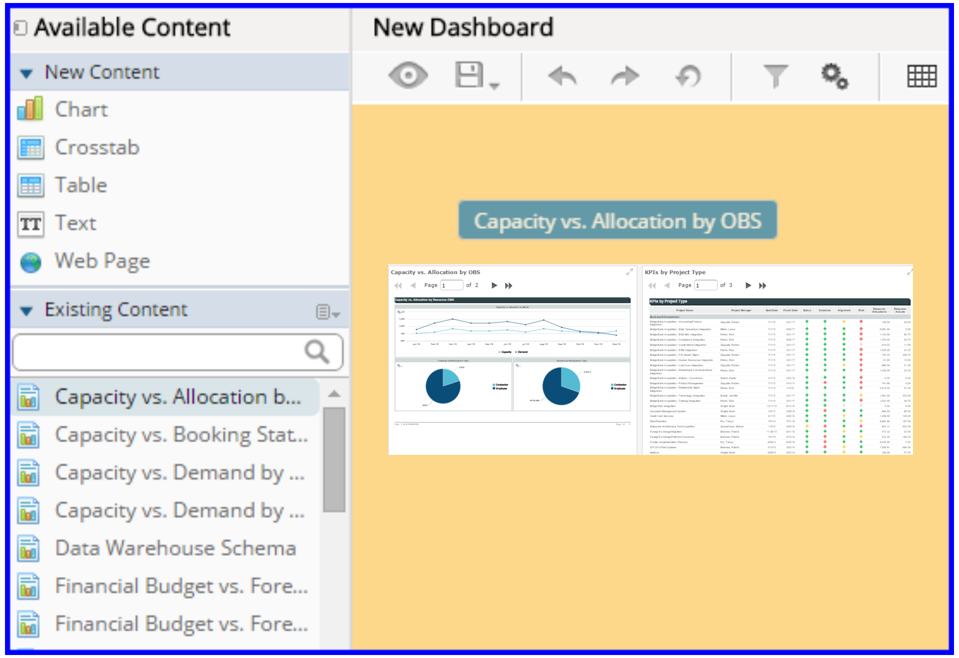
Dashboards

- A Dashboard report displays several reports in a single, integrated view.
- A dashboard can include other dashboards, input controls for choosing the data displayed in one or more frames, and custom frames that point to URLs for other content.
- By combining different types of related content, you can create appealing, data-rich dashboards that quickly convey trends.

Creating a Dashboard Report

- Jaspersoft Dashboards provides the ability to display several reports in a single, integrated view.
- Combining different types of reports, creates appealing, data-rich dashboards that quickly convey trends.

  - Drag and drop an item from the available content into the dashboard canvas.
  - Resize by dragging the edge of a content box to resize



Exercise 7

Creating a Dashboard

Part One: Creating Dashboards

1. Click on the **Create Drop Down** menu
2. Select **Dashboard, New Dashboard** page displays
3. Under the **Existing Content** section type **'KPI'** into the **search window** and click on the **magnifying glass**
4. Select the drag **KPI's By Project Type** onto the Dashboard portion of the screen
5. Use the  in the **corners** so the size of the screen can be adjusted

Part Two: Adding Additional Reports to the Dashboard

1. Type **‘Status’** into the **Existing Content** search window and click on the magnifying glass
2. Select and drag the Select **‘Project Status Detail’** into the add to Dashboard **below the KPI’s by Project Type**
3. Click the **Save** icon
4. Type **My Dashboard** with your initials into the Name field
5. Locate your **Training** folder
6. Click on **Dashboards**
7. Hover over the **Save Icon** and select **Save Dashboard**
8. **Type your Initials at the end of New Dashboard**
9. Expand the folder structure and locate under **your Training ID** under the **Users Folder**
10. Expand the **Training Folder**
11. Click on **Dashboards**
12. Click the **Save** button

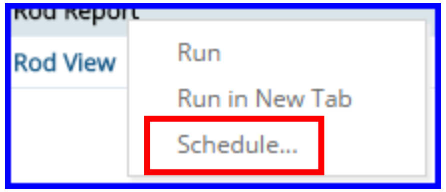
Scheduling a Report

- ✓ Creating a schedule
- ✓ Setting the report parameters
- ✓ Defining the output format
- ✓ Sending report notification

Scheduling a Report

- Advanced Reporting provides users with the opportunity to run a report based on needed frequency.
- Users can define the day, time, recurrence and output formats using the *Scheduling Wizard.*

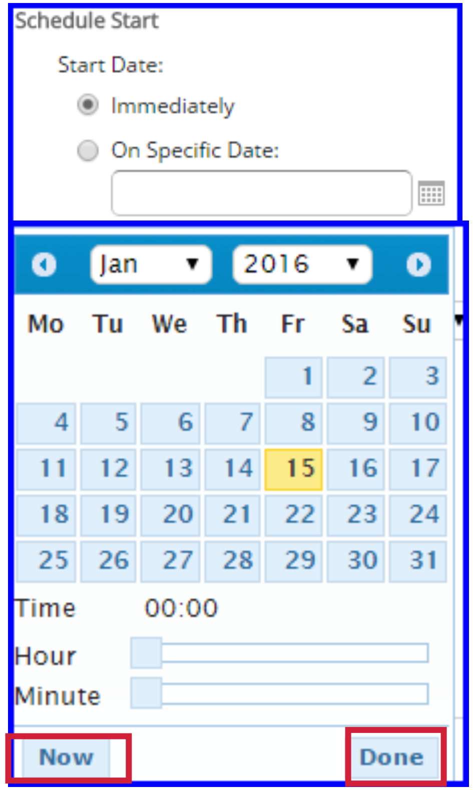
1. **Right click** on the **Report name** to be scheduled.
2. Click **Schedule**.
3. When the Scheduled Jobs window displays, click **Create Schedule.**



Scheduling a Report – Schedule Tab

The Schedule window displays four tabs:

By default the Schedule tab displays to allow the user to define when the report is going to run.



Schedule Start Date:

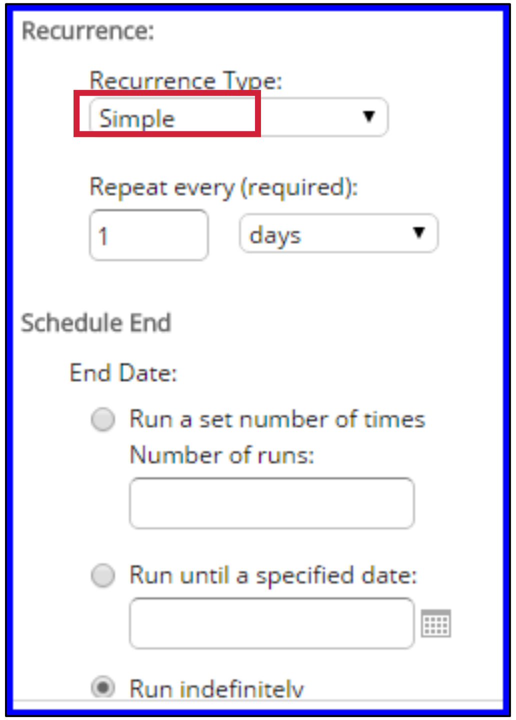
- *Immediately*
- *On Specific Date*: click on the **Calendar Icon** to enter a specific date and time. Click **Done.**

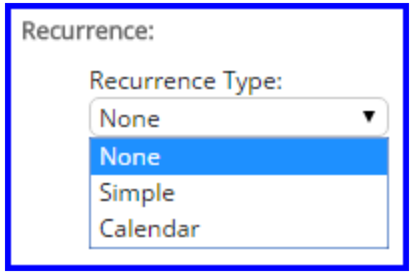
Note: The *Now button* is accessed via the Calendar icon.

Scheduling a Report – Schedule Tab (2)

There are three options for setting a Recurrence schedule: None, Simple or Calendar.

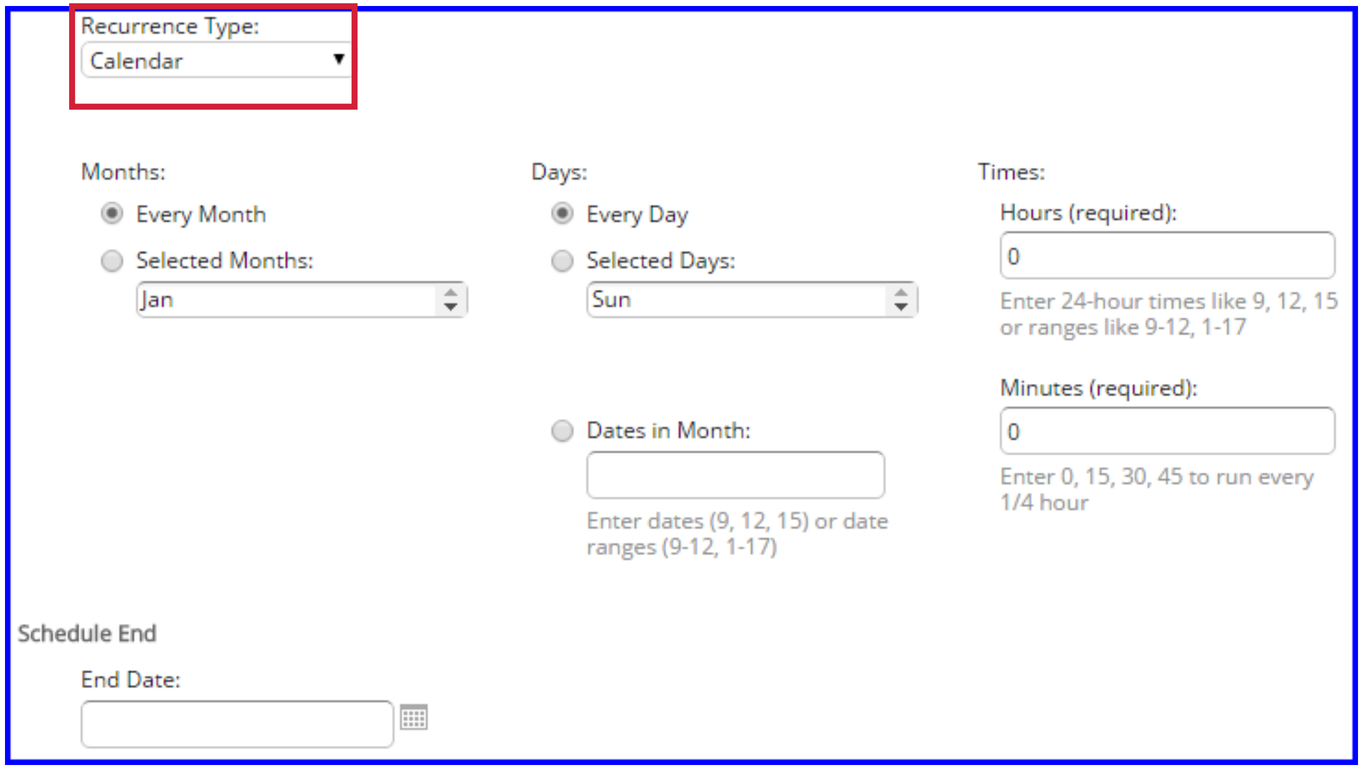
- Set **Recurrence Type** to **Simple.**
- *Define the repeat cycle* by selecting number of minutes, hours, days or weeks.
- Select the **Schedule End** by selecting: Run a set number of times, Run until a specified date, or Run indefinitely.





Schedule A Report – Schedule Tab (3)

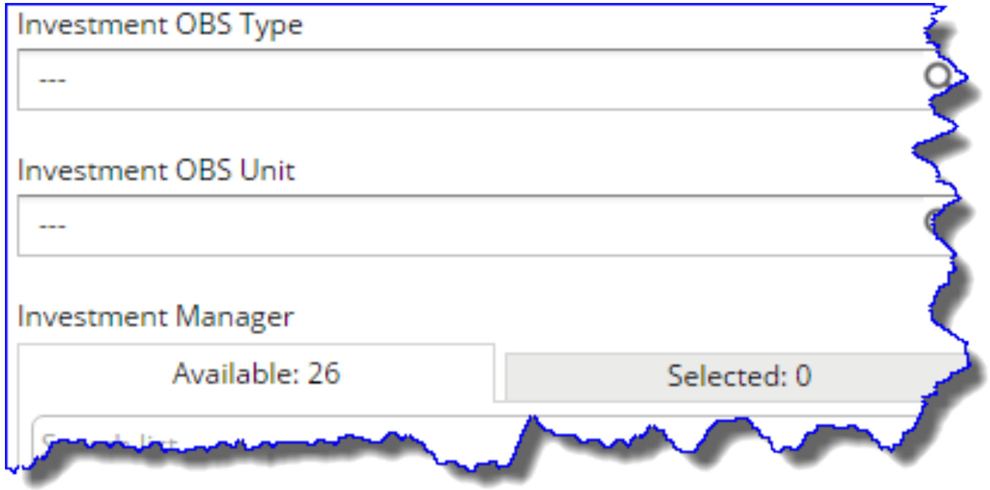
For a more detailed set of recurring values select *Calendar from the Recurrence Type drop-down.*



Scheduling a Report – Parameters Tab

If a report contains a set of report parameters they can be set for the scheduled report. This will ensure that the report provides only the data necessary for the end user.

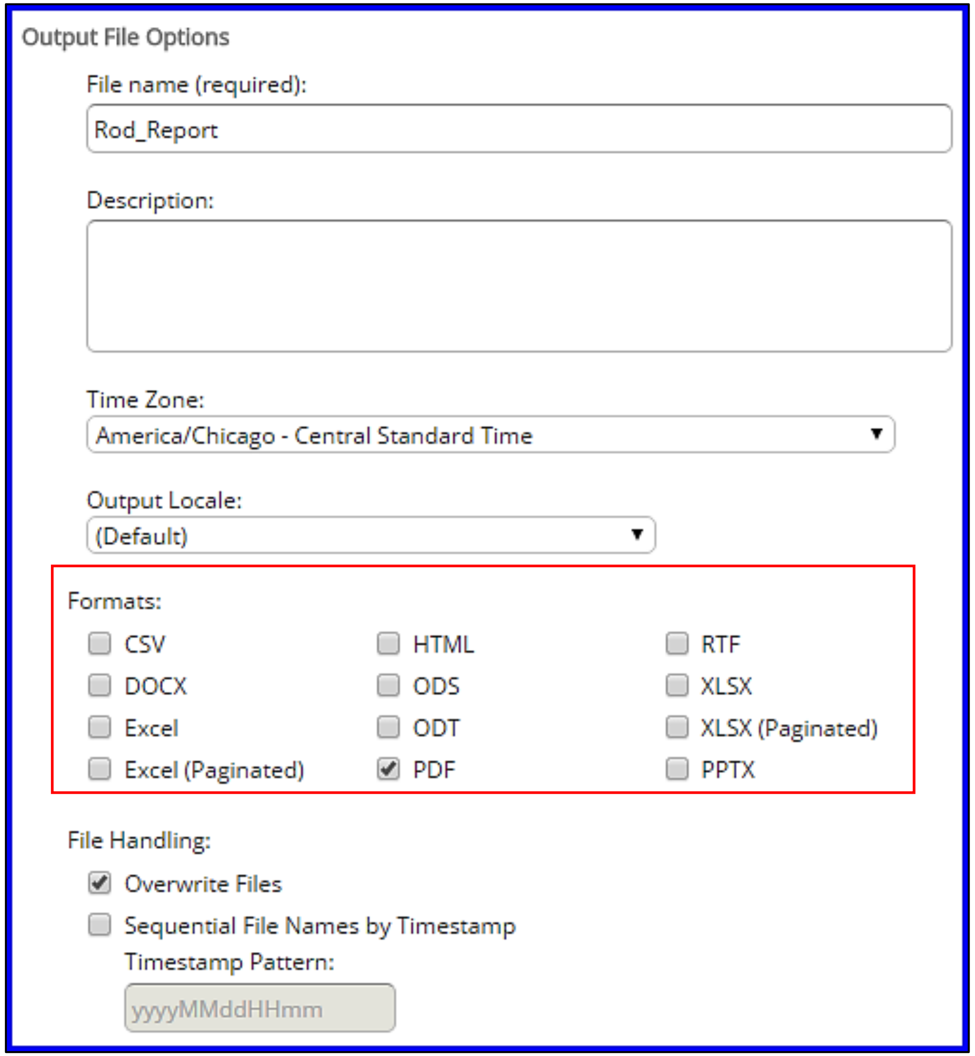
- Parameters will vary by report but could include:
  - Investment OBS Type
  - Investment OBS Unit
  - Investment Manager
  - Investment name
  - Investment Status
  - Investment Type
  - Fiscal Year



Scheduling a Report – Option Output Tab

There are many different report format options.

- The default is PDF.
- Only two formats can be chosen.

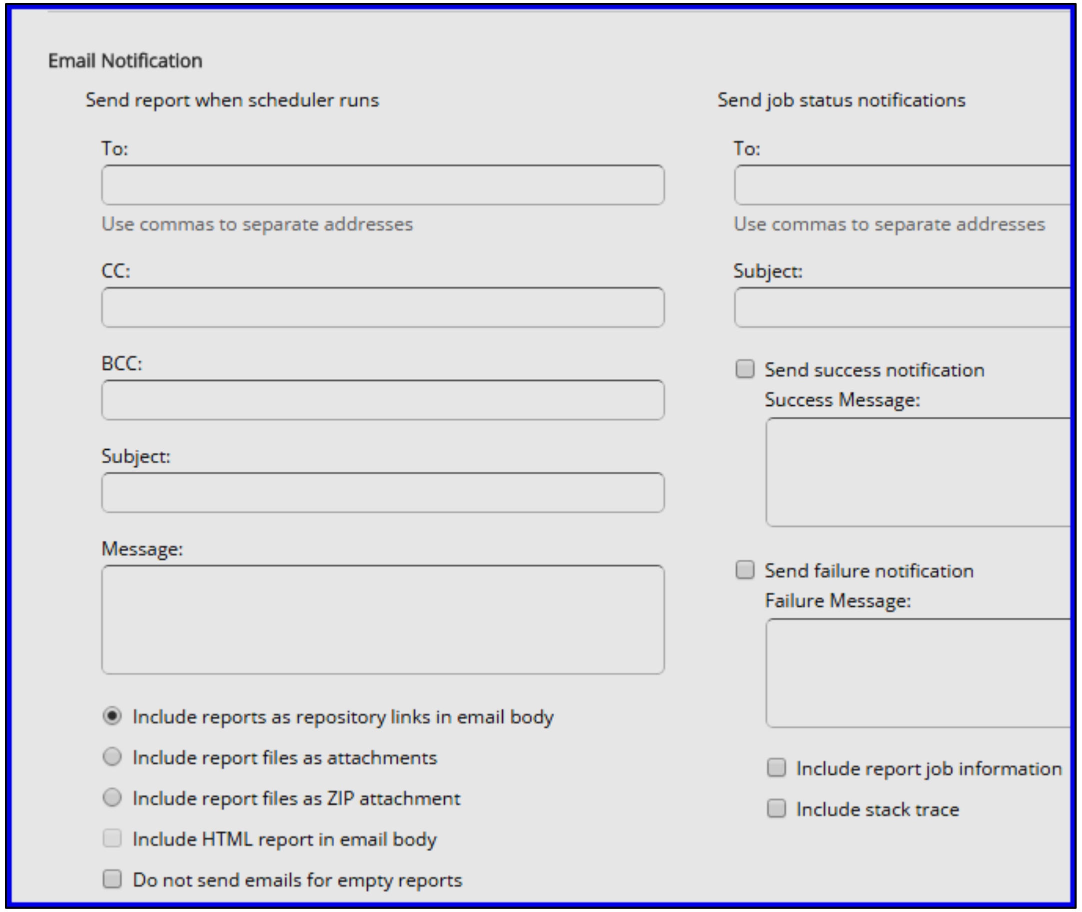


Scheduling a Report – Notifications Tab

E-mail notifications can be sent to users who need to receive the completed report

Notifications can contain:

- Subject
- Message
- Send job status success and failure notifications/messages.
- Additional options such as repository links in email body, include reports as attachments, etc.



Exercise 8

Scheduling a Report

Exercise Eight: Scheduling a Report

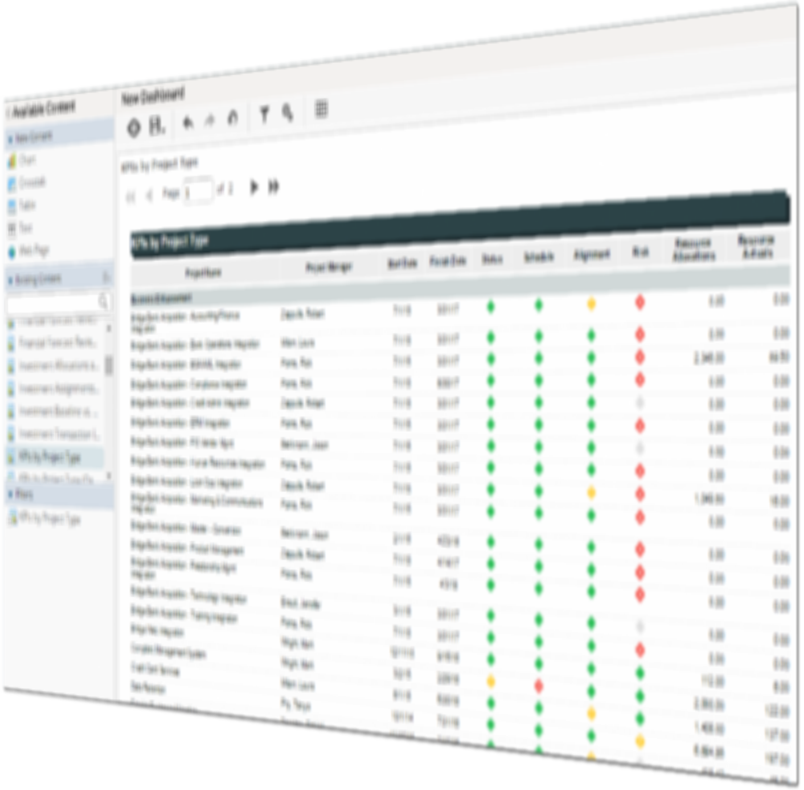
1. Click on the **Library** Link
2. Filter to **Risk**
3. **Right Click on the Project Risk Register** report and select **Schedule**
4. Click **Create Schedule** from the menu options
5. In the **Specific** Date field set to **today's date**
6. Set **Time** to **18:00** (6:00)
7. **Recurrence: None**
8. Click on the **Parameters** tab
9. Set the Parameter Values for the **Project Type** to **Major Project**
10. Click the **Output Options** tab

Exercise Eight: Scheduling a Report, cont.

11. **Formats Section**: Select **HTML** and **PDF**
12. **Uncheck** Overwrite files
13. **Uncheck** Output to Repository
14. Click the **Notifications** tab. We will not set any notifications for the report
15. Click **Save**
16. **Enter your first name as a name for the Scheduled Job Name**
17. Click **Save**
18. **Scheduled Jobs** window will display the **Schedule Job Information**
19. The report is now scheduled and would be delivered automatically according to values set in the job schedule parameters

Key Points

- Provided an understanding of how Jaspersoft works.
- Demonstrated how to access and navigate within Advanced Reporting
- Showed how to access and Run a Pre-Existing Report
- Created and saved an Ad Hoc Report
- Demonstrated how to build Dashboards, Charts and Cross Tab Views



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- Access your account at pmi.org
- Click on **Certification**
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- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- 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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Appendix

- Differences Between CA PPM 14.2 and 14.3
- Jaspersoft Technical Overview
- Configuring Custom Attributes
- Jaspersoft Jobs
- Jaspersoft Security Administration
- Jaspersoft Users and Roles
- Create a custom Domain

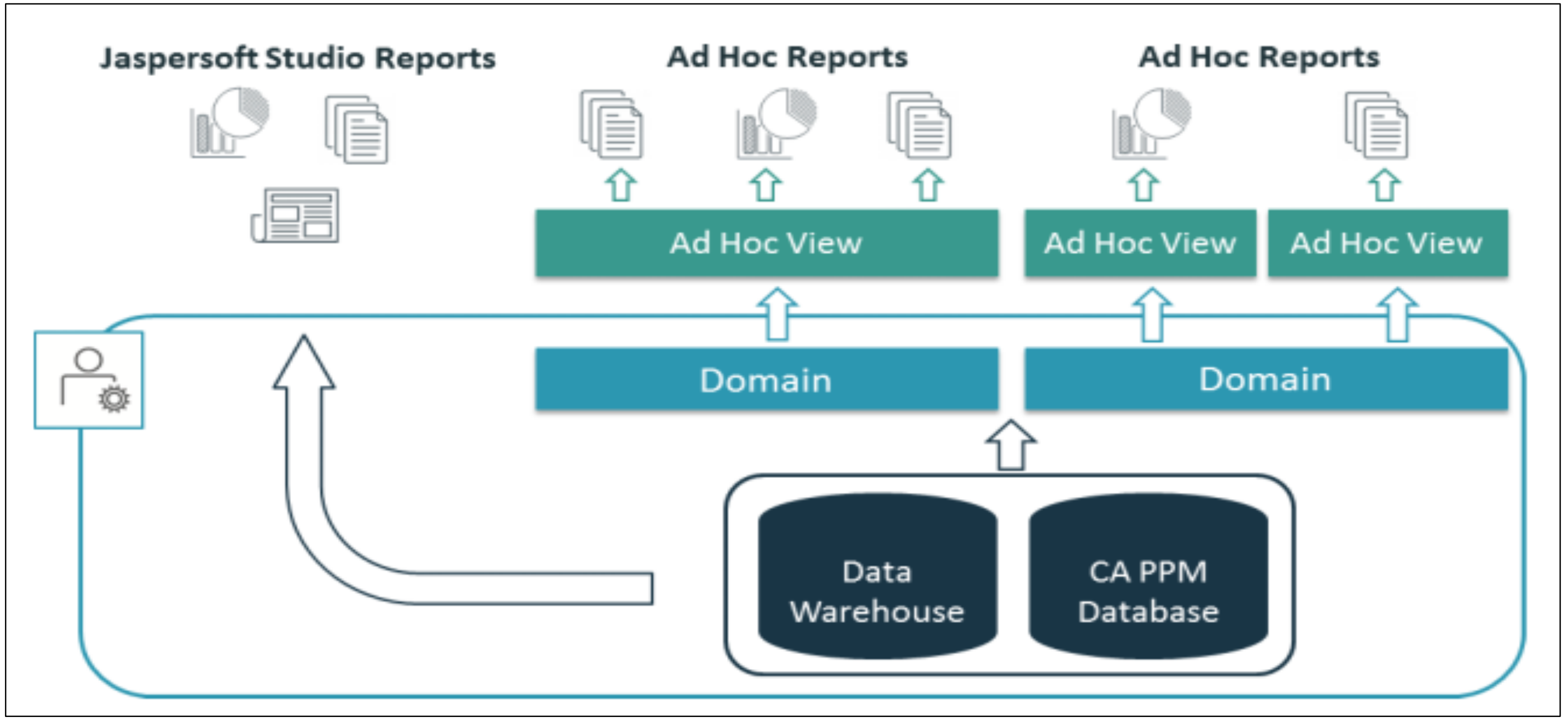
Differences Between CA PPM 14.2 and 14.3

Changes were made to Advanced Reporting in CA PPM 14.3.

- Home page displays a new set of icons
- Data Chooser: Source (Topics \ Domains) is now called Select Data
- Select Data displays two Icons Tree or List
- Change in the Create Dashboard left hand menu structure making it easier to locate the report(s) to pull into the Dashboard.
- Can no longer choose the Ad Hoc format (Table, Chart, Crosstab) from the bottom of the Select Field page. It is selectable from the ad hoc views menu structure.

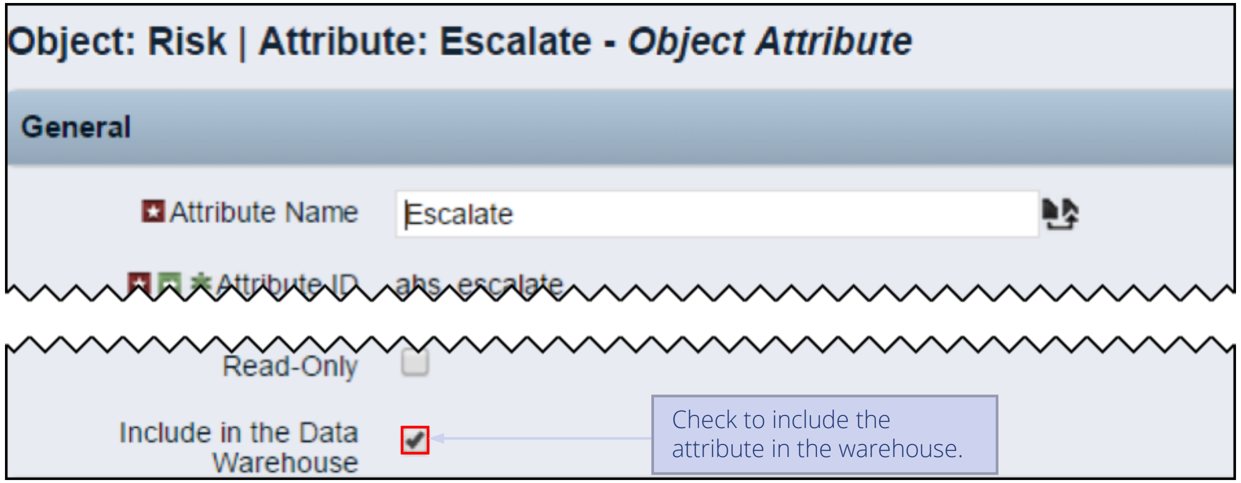
Jaspersoft Technical Overview

Jaspersoft uses fields and data from CA PPM and places them in a Data Warehouse. The JasperSoft Data Warehouse allows for easy-to-read View generation, Interactive Reports, Dashboards and Charts.



Jaspersoft Configuration Custom Attributes

- One of the key advantages of JasperSoft over Business Objects is the ability to add Custom Attributes to the Domain without needing to modify the Universe.
- However, in order to add the Custom Attribute, check **Include in the Data Warehouse** box on the Attributes properties page. *If you do not check this box, the attribute is not added to the domain*.



Jaspersoft Automation / Jobs

There are three jobs that the Administrators need to schedule in order for JasperSoft to work correctly. They are:

- Create and Update JasperSoft Users Job
  - Creates active CA PPM Users into JasperSoft.
    - Security rights driven
- Load Data Warehouse Job
  - Extracts data from CA PPM's databases
  - Optimizes the data for read performance purposes
- Load Data Warehouse Access Rights Job
  - Extracts access rights for investments and resources from CA PPM databases

Jaspersoft Security Considerations

There are several new security rights associated with JasperSoft reporting.

Best Practice Recommendations:

- **New Clients:** Remove security rights for access to the old Business Objects reports (*Reports – Access)*. This eliminates the risk of users becoming confused by accessing the wrong reporting feature.
- **Transitioning Clients:** Transitioning from BO to JasperSoft where access to old reports is still needed, train users on the two reporting tools and their various functions in relation to each other.
  - However, they are not be able to create the view or report as no domains are available. To fix this, it is necessary to add users to domains using the *Manage* menu.

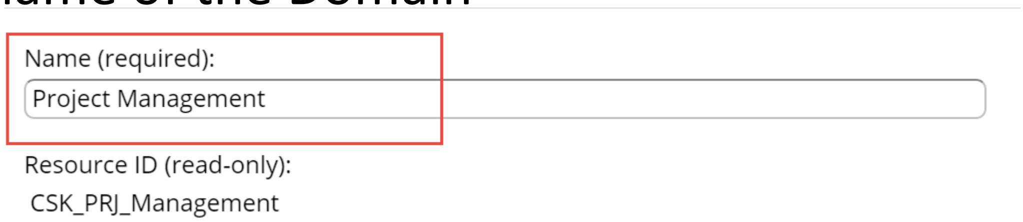
Jaspersoft Users and Roles

- For example, to give Project Managers (PMs) access to build reports from the Project Management Domain, add them to the *CSK_ROLE_PROJECT_MANAGEMENT* role. They will then be able to view the Project Management domain for Ad Hoc reporting and all out of the box public reports built using that domain.
- To give PMs access to all domains, add them to *CSK_ROLEALL_REPORTS_DOMAINS.* The following table shows the difference between the two roles.

Create a Custom Domain

Custom domains should be created if the user group cannot create valuable reports with the out of the box domains. To create a custom domain follow the steps below

1. Copy an OOTB domain
2. Paste this OOTB domain into a custom domain folder outside of the CA PPM folder
3. Click Edit on the new copied domain
4. Modify the name of the Domain



5. Click the Submit button

   Note: Modifying the name destroys the link between the copied OOTB domain

6. Click Edit on the new custom domain

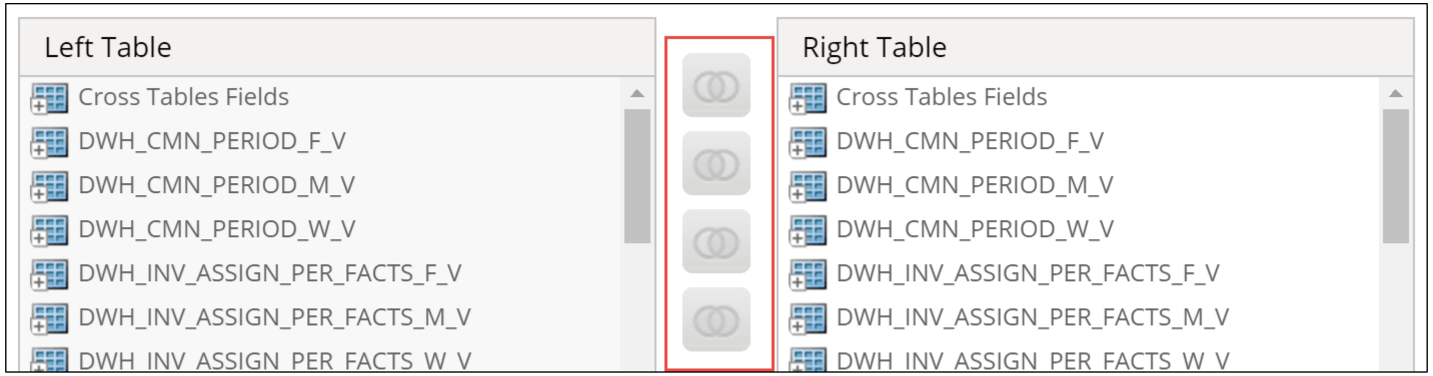
Create a Custom Domain Cont.

7. Click on the link “Edit with Domain Designer…”

8. Add the following DWH tables you want to bring into your new domain to the selected tables

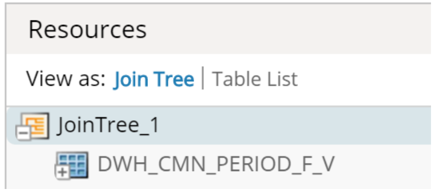
   Note: For information on what tables contain click [link]

9. Click the Joins tab
10. Join the two tables based on the data need.



Create a Custom Domain Cont.

11. Click the Display Tab
12. Expand the jointree table in the Resources list on the far left side



13. Expand the tables in the tree and add the attributes you want to select in your domain by click on the arrows.

 - Adds the field to the overall set.

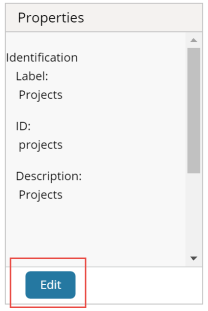
 - Adds the field to the selected set.

Note: This is the recommended button to use. Create subsets and then use this button to add the new fields to the selected subset.

To add new subsets click “New Set” button once you have selected a parent set in the Sets and Items list.

Create a Custom Domain Cont.

14. Once the attribute is added to the set click the Edit button under the properties section on the right side



15. Edit the label name to an appropriate label
16. Click Save
17. Click Ok once you have added all attributes
18. Click Submit to finish editing the domain