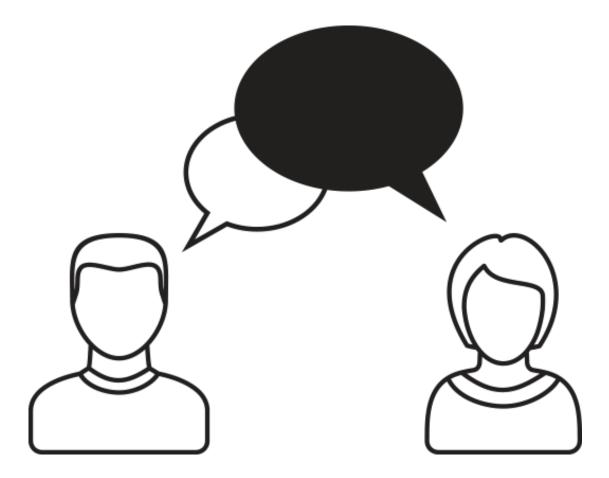
regoUniversity 2017

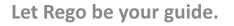
Jaspersoft Studio | Advanced

Your Guides: Darren Greer, Nikhil Gadgil

Introductions

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





- Introduction
- Modifying an Out of the Box Report

Part I Agenda

Part I: Introduction

✓ Jaspersoft – Overview of the Big Picture



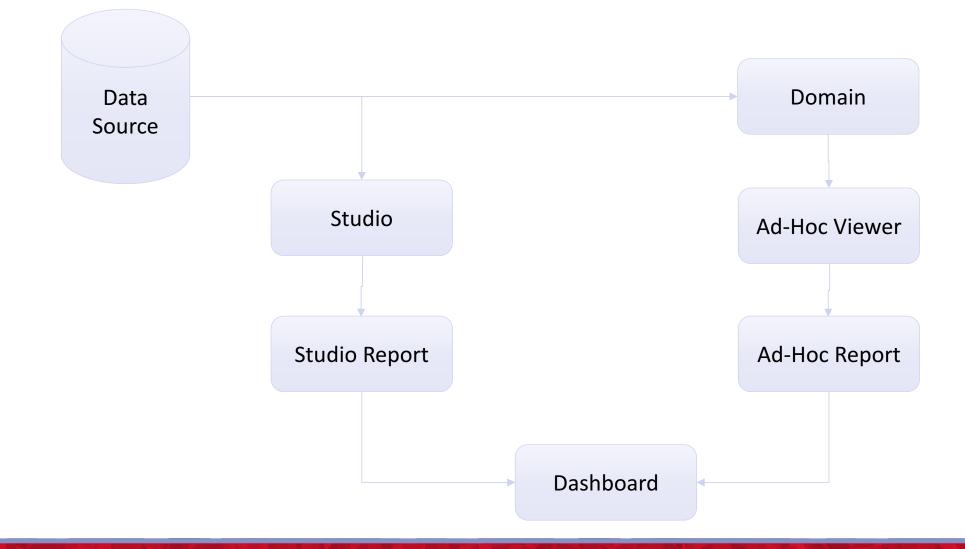
What Is Jaspersoft?

- JasperSoft is a reporting software that takes information from Clarity to provide easy to read, highly interactive reports for users.
- 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 Clarity 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.

read

• Reports can be published in PDF, XLS, XLSX, CSV, DOC X, RTF, ODT, ODS, or PPTX

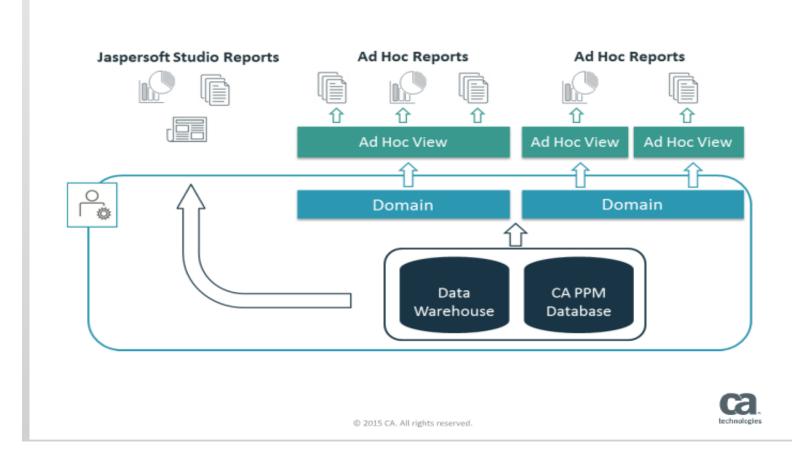
Overview - The Big Picture



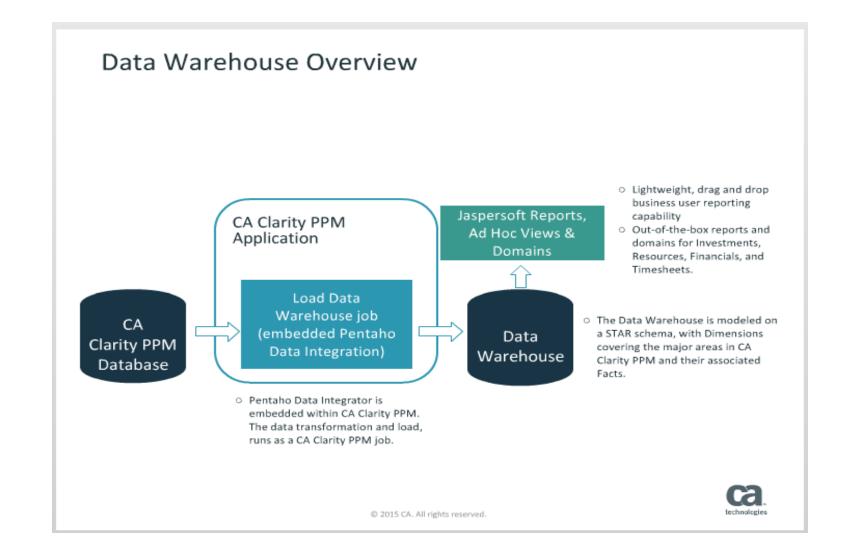


CA Jaspersoft Overview

Jaspersoft Overview



CA Data Warehouse Overview



Jaspersoft Studio – Data Adapter

- In this exercise we'll create a new Data Adapter, which we will connect to an existing Clarity 14.2+ Oracle instance
- From the "Repository Explorer" right-click on Data Adapters, and select "Create Data Adapter", then select "Database JDBC Connection"
- Give it a meaningful Name, then select "tibcosoftware.jdbc.oracle.OracleDriver" for the JDBC Driver
- Use the following information for the URL, Username and Password:
- Url: jdbc:tibcosoftware:oracle://54.215.229.225:1521;SID=clarity
- CA PPM DB User: ro_user
- CA PPM DB Pass: dbxistRhTr759
- CA DWH DB User<mark>: ro_dwh_user</mark>
- CA DWH DB Pass: ghdtGfelmcn67
- Verify using "Test"
- Click "Finish"

| ty | Data Adapter Database JDBC Connection |
|--|--|
| Data Adapter Wizard 📃 🗖 🗙 | Name: RegoUniversityLocal |
| ata Adapters se SQL queries to get data from a database | JDBC Driver tibcosoftware.jdbc.oracle.OracleDriver JDBC Url jdbc:tibcosoftware.oracle:// <host>:1521;SID=<sid> Username </sid></host> |
| Cassandra Connection Collection of JavaBeans Custom implementation of JRDataSource Database JDBC Connection EIBQL Connection EIBQL Connection HBase Thrift Connection HBase Thrift Connection Hibernate Session Hibernate Session Loaded By Spring Hive Connection | Password Attention! Passwords are saved in clear text Database Location Connection Properties Driver Classpath |
| INDI Data Source ISON File Test < Back Next > Finish Cancel | ⑦ Test < <u>Back</u> <u>Next</u> > <u>Finish</u> Cancel |

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Data Adapter Wizard

Jaspersoft Studio – Repository Connection

- At this stage, having connected a Data Adapter to a Clarity Database, one can begin development locally
- To validate your locally developed report against the Jaspersoft Server, you must first connect your Studio environment to a Jaspersoft Server
- Within the "Repository Explorer" right-click on "Servers" and select "Create JasperReports Server Connection" and name the connection appropriately
- For this session, we'll use the following information to connect to Rego development server:
 - URL: http://regou06.dev.regoconsulting.net:8089/reportservice/
 - Organization: rego
 - Username: jasper_dev
 - Password: Clarity1

| 0 | Server profile wizard |
|---|--|
| JasperRe | eports Server Access Configuration |
| Configure | server connection |
| Name Re | goUniversityServer |
| URL htt | p://clarity09.dev.regoconsulting.net:8089/reportservice/ |
| Account Organizat User Password : Advanc | regou |
| | |
| ? | Test Connection Einish Cancel |



Advanced Reporting - Connection

- In addition to the repository and data adapter connection, we'll need to ensure we have connectivity to the Advanced Reporting section of CA PPM
- The URL to the Rego University CA PPM instance is:
 - <u>http://regou06.dev.regoconsulting.net:8082/niku/nu</u>
- 100 users have been created for the purposes of these training classes:
 - User Accounts: jasper_adhoc_01 jasper_adhoc_100
 - Passwod: niku2000
- Work with your instructor to choose which user account to use, in order to avoid conflicting development with other class members

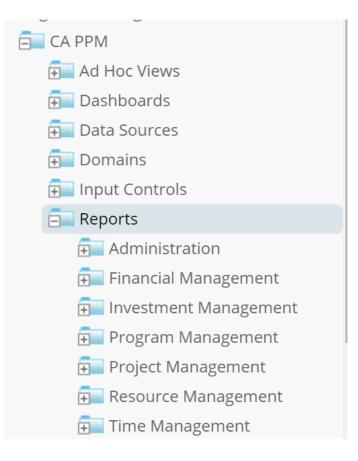
Part I: Copying An Out Of The Box Report

- ✓ Copy the Report
- ✓ Modify the Report
- ✓ Add a Sub Report
- ✓ Publish the Report

Out Of The Box Reports

CA PPM OOTB Reports

- CA PPM provides a large amount of high quality reports out of the box. These reports are all separated into various categories.
 - Resource Management
 - Project Management
 - Time Management
 - Portfolio Management
- These reports are also excellent examples of how to do something in jaspersoft studio. Each report contains functions, frames, sub reports and graphs.
- Reports are located under the CA PPM Folder -> Reports



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Copy An OOTB Report

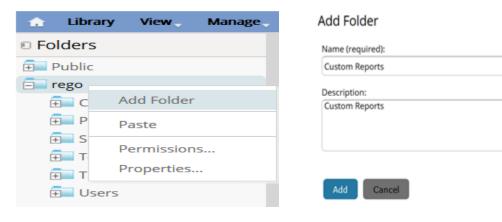
- When a developer needs to modify or edit an out of the box report it is best practice to copy the report and put it into a folder outside of the CA PPM structure. The reason we do this is because during an upgrade or troubleshooting CA may have to refresh their CA PPM folder, and you will lose your saved reports and items.
- An admin can copy a report by navigating to the Advanced Reporting link in Clarity.
- Clicking on the View -> Repository link.
- Within the repository navigate to the report you want to edit.
- Right Click on the report and click the Copy function.
 - Note: You can select the report and click the copy button on the top toolbar as well.

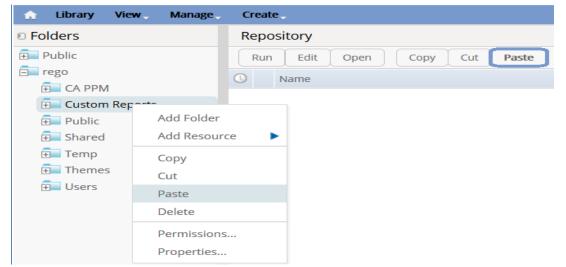
| Repository | |
|--------------------------|-----------------------|
| Run Edit Open | Copy Cut Paste Delete |
| 🕓 Name | |
| KPIs by Project Type | |
| KPIs by Project Type (D | Dashboard) |
| Key Task and Mileston | e Status |
| Project Change Reques | st Register |
| Project Cost and Effort | t |
| Project Issue Register | |
| Project Portfolio Sumn | nary |
| Project Risk Register | |
| Project Risk, Issue, and | Change Summary |
| Project Status Detail | |
| Project Status Report I | list |
| Project Storyboard | _ |
| Project Task Depende | Run |
| Top 50 Project Watch | Run in New Tab |
| | Run in Background |
| | Schedule |
| | Edit |
| | Сору |
| | Cut |
| | Delete |
| | Permissions |
| | Properties |



Paste An OOTB Report

- Within your Repository, navigate to outside of the CA PPM folder and create a folder for Custom Reports.
- Right Click on the Organization folder and select 'Add Folder'
- Name the new folder as 'Custom Reports' and click 'Add'
- Once the folder is created, paste the earlier copied report by selecting the 'Custom Report' folder and clicking the button 'Paste' on the top toolbar.







Rename An OOTB Report

- Once the copy of OOTB report is available in custom report, change the Report's name to completely remove the internal link between the two reports.
- To rename the report, right click the report and select 'Edit'
- Update the Name of the report and click 'Submit'

Exercise: Copy an OOTB Report.

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| 0 | Name | |
| | Resource Skills | |
| | | Run |
| | | Run in New Tab |
| | | Run in Background |
| | | Schedule |
| | | Edit |
| | | Сору |
| | | Cut |

| | Set Up the Report |
|----------------------|---|
| | Set the required values for the report, then, optionally, proceed to other pages in the |
| Set Up | Name: |
| Controls & Resources | Project Storyboard - Custom |
| 5 | Resource ID (read-only): |
| Data Source | CSK_PRJ_ProjectStoryboard |
| Query | Description: |
| Customization | Project Storyboard - Custom |
| customization | |
| | |
| | |
| | Locate the JRXML File |
| | Upload a Local File |
| | |
| | |
| | O Select a JRXML from the Repository |
| | |



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Open The OOTB Report In Studio

- Now that the report has been copied over and is located outside of the CA PPM folder we can edit it in studio.
- First we have to make a jaspersoft project to hold the JRXML from the OOTB report.
- In jaspersoft studio click 'New \rightarrow Project' under File tab to create a new project.
- On next window select 'Jaspersoft Studio → JasperReports Project' and give a name to your new project and click Finish.

| TIBCO Jaspersoft® Studio Proference <u>File</u> Edit <u>Navigate</u> Project <u>Wingerence</u> | | | Wew Project - Søløct a wizard - Create a JasperReports project - | | New Jasper Project Wizard – — X New Jasper Reports Project Create a new JasperReports projects |
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| New Open File | Alt+Shift+N> | Jasper Report Style Template File | Wizards: type filter text > | | Name RegoU |
| Close | Ctrl+W | Data Adapter Project | JasperReports Samples Samples Dava Plug-in Development SVN | | |
| Close All Save Save As | Ctrl+Shift+W Ctrl+S | Other Ctrl+N | Show All Wizards. Control Co | Cancel | ⑦ < Back Next > Einish Cancel |

Open The OOTB Report In Studio – Cont'd

- Once the project has been made navigate to the repository and find the new report folder with the copied report.
- Right Click on the main JRXML and click Download To File.
- Select the project we recently created to hold the report files and rename the default file name 'main_jrxml' and click 'Ok'

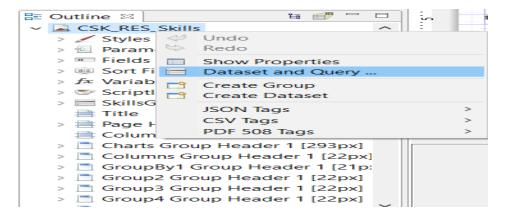
Exercise: Open the OOTB Report in Studio.

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| Repository Explorer 🛛 쀁 Project Explorer 📃 🗖 | Save file to another location. | \$R(StageKey) | SIFESTAG | = / sr(P | rogressKey) | \$F{PROGRESS} | SR(AduatsKey) | SF SP(financia/PlanTypeKey_1) = | \$P |
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| > 🖾 Ad Hoc Views | Enter or select the parent folder: | \$R(PlanKey) | DateForma | DateFormat. | \$R(ScheduleKey) | | \$R(EACToBaseline VarianceKey) | \$F \$P(financialPlanTypeKey_1) = (EAC_LABOR_H "FORECAST" ? \$R | SF {EAC_TOTAL_C |
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| SR{ProjectSta | File name: Project Storyboard - Custom.jrxml | | | | | | | | |
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| SR{PhaseStar | | | | | | | Nia Data | | |
| R{Financial Properties | OK Cancel | \$R(NoMatching Re | cordsKey) | | | | NO Data | | |

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Modify The OOTB Report In Studio

- The report JRXML is open in Studio and available to edit. You can modify, delete, any object on the report.
- The user also has access to the Data Set and Query that is being used in the report. As long as you know how to modify the query without testing it you can.
- To access the report Query, right click on report name in 'Outline' section and select 'Dataset and Query'.
- Report definitions like Query, Fields, Parameters and sort order can be viewed or edited from 'Dataset and Query' dialog box.
- Out of the Box reports cannot be previewed via Studio even when the environment is On Premise. These reports utilize the parameters of logged in users and other various input controls stored on the sever. It also uses functions for formatting that cannot be interpreted without being ran from jaspersoft server.



| 🖺 No Data Adapter 🔻 | | | |
|---|---|--|-------------|
| Query Java Bean | | | |
| anguage sql | ~ | | Read Fields |
| No Metadata. Double click to refresh. 10 11 12 13 4 5 6 6 8 0 10 11 12 13 | sf.level2_skill_id, CASE WHEN sf.level3_name IS NULL T sf.level3_skill_id, CASE WHEN sf.level4_name IS NULL T sf.level4_skill_id, | "HEN '' ELSE sf.level2_name END level2_name, "HEN '' ELSE sf.level3_name END level3_name, "HEN '' ELSE sf.level4_name END level4_name, "HEN '' ELSE sf.level5_name END level5_name, | ~ |
| [Texts] Ou | | | |
| Texts Ou | A ¥ | | |
| Field Name SKILL_ID | Class Type java.math.BigDecimal | Description | Add |
| Field Name SKILL_ID SKILL_NAME | Class Type java.math.BigDecimal java.lang.String | Description | Delete |
| Field Name SKILL_ID SKILL_NAME HIERARCHY_LEVEL | Class Type java.math.BigDecimal java.lang.String java.math.BigDecimal | Description | |
| Field Name SKILL_ID SKILL_NAME HIERARCHY_LEVEL LEVEL1_NAME | Class Type java.math.BigDecimal java.lang.String java.math.BigDecimal java.lang.String | Description | Delete |
| Field Name SKILL_ID SKILL_NAME HIERARCHY_LEVEL | Class Type java.math.BigDecimal java.lang.String java.math.BigDecimal | Description | Delete |



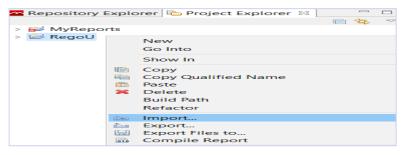
Modify The OOTB Report In Studio – Cont'd

- Exercise: Modify the report's object. Remove Frames and Graphs as you please.
- Extra Credit: Modify the sql and add a new custom field to the report.

Let Rego be your guide.

- Next, we'll focus on adding a sub-report, which pulls in the milestones for each project
- To start, we'll add a one more frame to the Group footer band Select 'Frame' element from 'Palette' and drop it on the group footer section below the existing frames.
- A pre-developed report has been made available at the following location – Download this to your PC:
 - http://jaspersoft.regoconsulting.com/2017/RegoU_Jaspersoft_Advan ced_Risks_Issues.jrxml
- Right-click on your project folder within the Project Explorer View and click "Import"
- Next, select "File System" under "General" Click Next

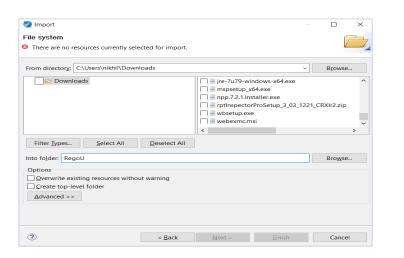
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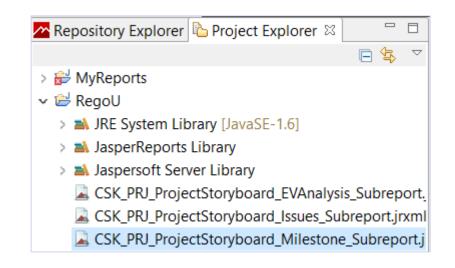


| 0 | Import | |
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| Select Import resources from | the local file system into an existing project. | 23 |
| Select an import source type filter text General General File Syster File Syster General File Syster General File Syster General File Syster General File Syster General File Syster Syster Syster Syster File Syster File Syster General File Syster General File Syster File Syster | le rojects into Workspace n es | |
| ? | < Back Next Finish | Cancel |



- Click "Browse" and then browse and select the location of the downloaded jrxml file
- Next, in the right pane, check the box for the jrxml file
- Then, click "Finish"
- The jrxml file should now be imported to your project



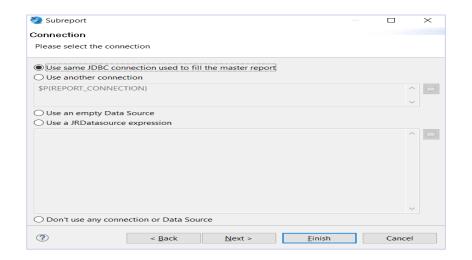


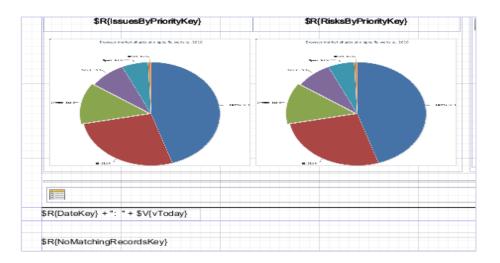
- Now, we'll add the subreport to the new Frame on Group Footer band Drag the Subreport component from the Palette view, into the new Frame
- On the next window, click "Select a report file..."
- Next, select the Risks and Issues report file, and click "Ok" Click "Finish"

| Subreport – 🗆 🗙 | 🗞 Open Resource — 🗆 🗙 | 🗞 Subreport — 🗆 🗙 |
|---|--|--|
| Subreport | | Subreport |
| 8 Please add an expression for subreport path | Select an item to open (? = any character, * = any string): | Please specify a report to be used as subreport, or just press finish to create an empty |
| | *.jrxml | subreport element. |
| O Create a new report | Matching items: | ○ Create a new report |
| Select an existing report | - | Select an existing report |
| | CSK_PRJ_ProjectStoryboard_EVAnalysis_Subreport.jrxml | "CSK_PRJ_ProjectStoryboard_Milestones_Subreport.jasper" |
| | CSK_PRJ_ProjectStoryboard_Issues_Subreport.jrxml | |
| | CSK_PRJ_ProjectStoryboard_Milestone_Subreport.jrxml - MyReports | |
| | CSK_PRJ_ProjectStoryboard_Milestone_Subreport.jrxml - RegoU | |
| | CSK_PRJ_ProjectStoryboard_Milestones_Subreport.jrxml - MyReports | |
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| Operation And | OK Cancel | Image: Second |



- On the next window select 'Use same JDBC connection used to fill the master report" so that sub report use the same data source as master project .
- Resize the subreport object to the full width and height of the Frame
- Then, resize the band height to fit





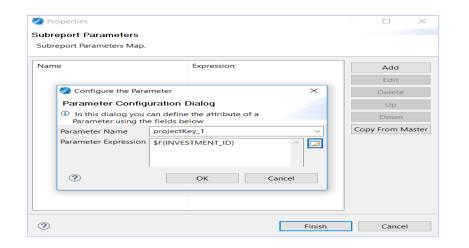
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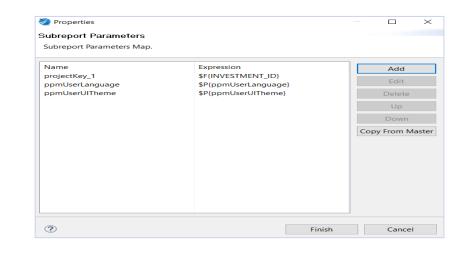
- The provided Subreport expects following parameter "projectKey_1", "ppmUserLanguage" and "ppmUserUITheme", which we'll now focus on
- Select the Subreport in the design view, then, in Properties open the "Subreport" sub-menu Click "Parameters"
- On the Parameters screen, click "Add"

| 🔲 Properties 🛛 🗖 Problems | s 🗖 | ▽ □ [|
|---------------------------|-----------------------------------|-------|
| Subreport: Subreport | ort | |
| The Appearance 🔄 Subrepo | ort 🔲 Advanced | |
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| Expression | "CSK_PRJ_ProjectStoryboard_Milest | 0 |
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| Connection Expression | \$P{REPORT_CONNECTION} | 0 |
| Data Source Expression | | 0 |

| Subreport Paramete | ers | |
|----------------------|------------|----------------|
| Subreport Parameters | Map. | |
| Name | Expression | Add |
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- Change the "Name" to "projectKey_1". Next, click on the "..." for the Expression Editor
- We'll be passing the "INVESTMENT_KEY" field, so double-click the "INVESTMENT_KEY" in the "Fields" menu. Click "Finish"
- As you can see, we're now passing "\$F{INVESTMENT_KEY}" as "projectKey_1" to the Sub report.
- Repeat the process for remaining two parameters, with a difference that parameter \$P{ppmUserLanguage} and \$P{ppmUserUITheme} from main report are passed as 'ppmUserLanguage' and 'ppmUserUITheme' to the subreport
- Now the updated OOTB report can be published on Clarity as explained earlier.







Redeploy The OOTB Report In Studio

- Since the JRXML contains the design of the report, by publishing the new jrxml to the report unit, replacing the old jrxml, you can update the report.
- Once editing the OOTB report is complete, save the jrxml file on Jaspersoft Studio and redeploy the report on Clarity using 'Publish' icon
- Using this method you can change the subreport jrxmls.
- If you wanted to add a new sub report from one OOTB report and put it into another, you can do that as well. Just make sure the expression for the sub report points to the new one in the report.
- Exercise: Add a sub report from another OOTB report into your current one.

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| Repository Explorer 🛛 🔓 Project Explorer 🛛 Publish the | file on JasperReports Sen | er (Ctrl+Alt+U | Ŋ | | | |
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| Project Storyboard Earned Value Anal | \$R(issuesByF | rioityKey) | \$R(Ri | aksByPrioiityKey/ | E | |
| Project Storyboard Issues Subreport | Toward days to | extanc32 | locare | lites transference 32 | - | |
| \$R{ProjectOBSTypeKey} | BERN Martin | | Meter | | | |
| \$R{ProjectOBSUnitKey} | - m | | | | | |
| \$R{ProjectManagerKey} | | | | | | |
| \$R{ProjectKey} | | - 10- | (mare | - 185-11 | GroupDeta | il Group Footer 1 |
| \$R(ProjectStatusKey) | | | | | ereapp cu | |
| C (DOM-J.Control/cr.) | | | | | | |
| \$R{WorkStatusKey} \$R{PhaseStartDateKey} | | | | | | |



Questions?





- Secondary Data Sets
- Setting Colors on Charts
- Using Domain as the Data Source
- Cross Tabs

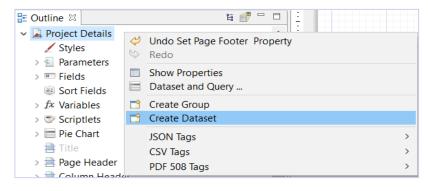
Part II Agenda

Part II: Secondary Data Sets ✓ Create a Secondary Data Set ✓ Filter the secondary data set based on a value from the main report

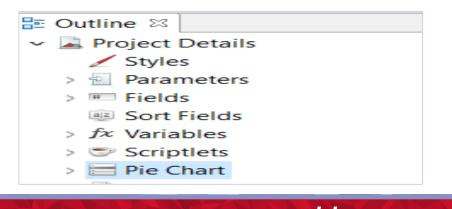


Creating A Secondary Data Set

- Creating a secondary data set allows a user to contain values that a chart or table outside of the main report's query.
- Charts and Tables can utilize other data sets.
- Filter a secondary data set based on the first is also possible.
- To create a secondary data set follow the steps below.
 - 1. Navigate to the outline tab in studio.
 - 2. Right Click on the Report name.
 - 3. Select Create Data Set
 - 4. Name the Data Set
 - 5. Select the appropriate Database JDBC DataSource
 - 6. Paste this query into the SQL window:
 - 7. http://jaspersoft.regoconsulting.com/2017/RegoU_Jaspersoft_Advanced_ Query_FinancialPie.txt
 - 8. Click "Finish"
 - 9. In the Outline you should now see the secondary data set with the name given. Treat this as you treat the query you use in the main report.



| 🗞 Dataset | | | | | \times |
|---------------------------------------|--------------------|--------|--------|--------|----------|
| Dataset | | | | | |
| Create a new dataset, please select a | unique dataset nar | ne. | | | |
| Dataset name: PieChart | | | | | |
| Create new dataset from a connect | ion or Data Source | | | | |
| ○ Create an empty dataset | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| ? | < Back | Next > | Finish | Cancel | |

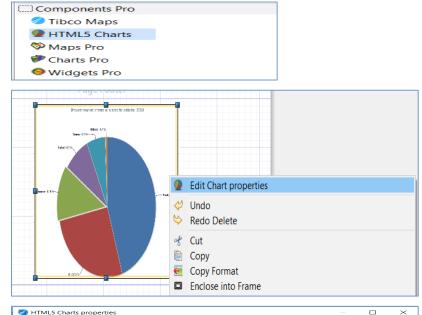


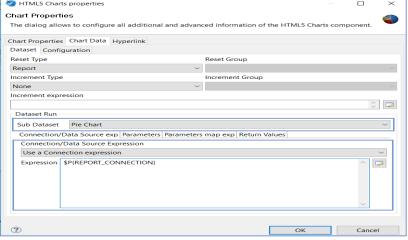
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Using A Secondary Data Set

- Charts and tables can have a different data source chosen when creating. This allows for the user to get summary data using a sub query that may contain additional rules or data.
 - 1. In the report, bring over the Chart object.
 - 2. Select the chart type and click Next.
 - 3. Next, Right-click on the chart and edit the chart properties
 - 4. On the Chart Data tab, select our new Dataset from the "Sub Dataset" menu
 - 5. Next, Select "Use a Connection expression", which should default to the report connection: \$P{REPORT_CONNECTION}







Using A Secondary Data Set – Cont'd

- Next, we will configure the chart to display the data from the query
- On the Chart Data tab, open the "Configuration" sub-tab
- Select the "Level1" category Click "Modify"
- Change Name to "Risk Type"
- Change Expression to \$F{LABEL}
- Leave Value Class Name "java.lang.String"
- Click "Ok"

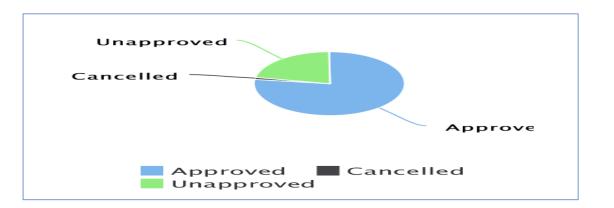
| HTML5 Charts pro | perties | | | | - 🗆 X |
|-------------------------------|------------------------------|-----------------|------------------------------|-----------------|--------------|
| The dialog allows to | configure all | additional a | nd advanced information of t | ne HTML5 Charts | component. 🖤 |
| Chart Properties Cha | rt Data Hyp | erlink | | | |
| Dataset Configurat | 🔊 Categor | ies level | _ | | |
| Categories Levels | Name Ris | sk Type | | | |
| Risk Type | | | cket Properties | | Add |
| | Expression | | \$F{LABEL} | 0 🗔 | Modify |
| | Value Class | | java.lang.String | | Remove |
| Value | | Order Ascending | | | |
| Name Task Cou | | or Expression | _ | | |
| Hidden | | | | | |
| Value definition | | | | | |
| Label Expression | | | ОК | Cancel | 0 |
| Calculation | | INOTIN | | | ~ |
| Value Expression | | \$F{TASKS} | | | 0 |
| Value Class Name | Value Class Name | | teger | | |
| Increment Factory | Increment Factory Class Name | | | | |
| Associated Hyperlink | | 🚳 Edit Hy | perlink | | |
| | | | | | |
| | | | | | |
| ? | | | [| ОК | Cancel |

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Using A Secondary Data Set – Cont'd

- Back in the Configuration tab, adjust the Value:
- Change Name to "Task Count"
- Change Label Expression to "Project Count" (With quotes)
- Change Calculation to "Count"
- Change Value Expression to \$F{INVESTMENT_KEY}
- Leave Value Class Name "java.lang.Integer"
- Click "Ok"
- Preview your report to validate

| ltTML5 Charts properties | | | | \times |
|------------------------------------|---|---------|--------|----------|
| Chart Properties | | | | |
| The dialog allows to configure all | additional and advanced information of the HTML5 Charts | s compo | nent. | |
| Chart Properties Chart Data Hyp | erlink | | | |
| Dataset Configuration | | | | |
| Categories Levels | | | | |
| Risk Type | | | Add | d i |
| | | | Mod | fy |
| | | | Remo | ove |
| Value | | | | |
| Name Task Count | | | | _ |
| | | | | |
| Hidden | | | | |
| Value definition Advanced pr | operties | | | |
| Label Expression | "Task Count" | | 0 | 8 |
| Calculation | Nothing | | ~ | - |
| Value Expression | \$F{TASKS} | | 0 | 8 |
| Value Class Name | java.lang.Integer | | | |
| Increment Factory Class Name | | | | |
| Associated Hyperlink | Sit Hyperlink | | | |
| | | | | |
| | | | | |
| (?) | OK | | Cancel | |





Filtering The Secondary Set

• The secondary set can take a value from the master report and use that as a parameter to filter on. This can be useful when doing subsets of data for charts and tables.

The following steps are for using a secondary data source with a chart.

- 1. In the outline find the secondary data source and create a parameter to be used.
- 2. Navigate back to the outline and select the chart on the report.
- 3. Double click to get the chart wizard to reappear. Note: If you have not added a chart or table already, please add one to get to this wizard.
- 4. Next to the dataset is the Parameters and Parameters Map.
- 5. Select the Parameters link.
- 6. In the list, click the Add button.
- 7. Find the parameter from the secondary set that will be used to connect to the master report.
- 8. Next in the expression editor choose the field or parameter to link to.
- 9. Click Ok.

| 🗸 🗮 Pie (| Chart | | |
|-------------------------|---------|--------------------------------------|--|
| > 🚰 P. > 🎫 Fi @ S | ieiu: | Undo Edit Highcharts element Redo | |
| > fx V | arial 🔲 | Show Properties | |
| > 🗇 S | cript 📑 | Create Parameter | |

| 🧞 HTML5 Charts propertie | 25 | \Box \times |
|--|--|-----------------|
| Chart Properties | | |
| The dialog allows to confi | gure all additional and advanced information of the HTML5 Charts co | omponent. |
| Chart Properties Chart Da | ta Hyperlink | |
| Dataset Configuration | | |
| Reset Type | Reset Group | |
| Report | ~ | \sim |
| Increment Type | Increment Group | |
| None | ~ | \sim |
| Increment expression | 📎 Dataset Parameter for Dataset Run 🚽 🗆 🗙 | |
| Dataset Run | Dataset parameter name projectKey_1 Value Expression \$P{projectKey_1} | ¢ 🔽 |
| Sub Dataset PieCha Connection/Data Sour | | ~ |
| Parameter | | Add |
| projectKey_1 | OK Cancel | Modify |
| | | Remove |
| | | |
| | | |
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| | | |
| ? | ОК | Cancel |

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Setting Colors On Charts

- Setting the colors based on the category value must be done via the advanced properties bucket. Follow the steps below.
 - 1. Edit Chart Properties
 - 2. Chart Data tab
 - 3. Configuration tab
 - 4. Click on Category Level
 - 5. Click Modify button
 - 6. Go to Bucket Properties tab.
 - 7. Click Add.
 - 8. Name the property color and give it an expression to define the color of the slice. Example below.

\$F{LABEL}.equals("LOW RISK") ? "#9CCB19" : \$F{LABEL}.equals("MEDIUM RISK") ? "#FCB514" : \$F{LABEL}.equals("HIGH RISK") ? "#B22222" : "#E8EBF2"

| 🞘 Categories level | | |
|---------------------------|---------------|-------------------------|
| Name Risk Type | | |
| Bucket information Bucket | et Properties | |
| Property | Expression | Add Modify Remove |
| | ОК | Cancel |

| 🗞 Categories level | — — × |
|--------------------|--|
| Name Risk Type | |
| Bucket information | Bucket Properties |
| Property Color | Expression \$F{LABEL}.equals("LOW Remove |
| | OK Cancel |

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Setting Colors On Charts

Once the bucket property has been created.

- 1. Navigate to the advanced properties for the configuration
- 2. Click Add
- 3. Set contributer to "SeriesItemProperty".
- 4. Name the property Name "color".
- 5. Check the Use Bucket Property Value radio button
- 6. Select the Color Bucket property that we setup in the previous slide.

| NTML5 Charts properties | | | \times |
|---|--------------------|-----------|----------|
| Chart Properties | | | |
| The dialog allows to configure all additional and advanced information of | the HTML5 Charts c | omponent. | |
| Chart Properties Chart Data Hyperlink | | | |
| Dataset Configuration | | | |
| Categories Levels | | | |
| Risk Type | | Ad | d |
| | | Mod | ify |
| | | Remo | ove |
| Value | | | |
| | | | |
| Name Task Count | | | |
| Hidden | | | |
| Value definition Advanced properties | | | |
| Color [SeriesItemProperty] | | Add | |
| | | Modify | / |
| | | Remov | |
| | | rterne v | |
| | | | |
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| | | | |
| | | | |
| ? | OK | Cancel | |
| | | | |

| 📎 Edit property | | | \times |
|----------------------|----|--------|----------|
| Contributor | | | |
| SeriesItemProperty | | | ~ |
| Property Name | | | |
| | | | |
| O Use Constant Value | | | |
| | | | ~ |
| Use Bucket Value | | | |
| Risk Type.Color | | | \sim |
| O Use Measure Value | | | |
| | | | \sim |
| O Use Expression | | | |
| | | ^ | Ţ |
| | | | |
| | | ~ | |
| | | | |
| | ОК | Cancel | |



Highcharts API

Once the chart is created you can add various custom properties to control the look and feel of the HTML5 Chart.

- 1. Navigate to the Chart Properties
- 2. Click Show Advanced Properties
- 3. Click Add
- 4. Open the Highmarks API website: http://api.highcharts.com/highcharts
- 5. To identify the property to name go down the hierarchy and the property name becomes the property identified path.
- 6. Property value is whatever value is expected.

| Property | Value | Add |
|---------------------------------------|-------|--------|
| chart.zoomType | "ху" | Modify |
| credits.enabled | false | |
| credits.href | | Remove |
| credits.text | | |
| plotOptions.column.dataLabels.enabled | true | |
| title.text | | |
| yAxis.title.text | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

lotOptions : area: { ... } arearange: { ... } areaspline: { ... } areasplinerange : { ... } bar: { ... } boxplot: { ... } bubble: { ... } column : allowPointSelect : false animation: true animationLimit: borderColor: "#FFFFFF" borderRadius: 0 borderWidth: 1 color: undefined colorByPoint : false colors : cropThreshold: 50 cursor: undefined vdataLabels :



Property name

plotOptions.column.dataLabels.enabled

Show Advanced Properties

Part II: Using Domain As The Data Source ✓ Using A Domain as the Data Source



Selecting The Domain

 Using a domain allows the user to have the ability to select the fields available in the domain as their data set. This can be an easy solution to using the direct query in the data set but limits the user from controlling the query and the filtering.

Follow the steps below to use a query as a data source

- 1. When creating a new Jaspersoft Report click "Domain JRS"
- 2. Next let the developer try to connect to an open repository.
- 3. If it can't connect, the next interface will appear allowing you to choose another server to use.
- 4. In the Domain section, select the domain you will be pulling the fields you want to bring into your report.

Note: You will have to bring over ID's to use in the filter expression instead of filtering the query.

| 📎 New Report Wizard | | | \times |
|-----------------------------|---|--------|----------|
| Data Source | | | |
| | | | |
| Data Adapter Domain JRS - I | Domain JRS | \sim | New |
| Server Clarity 12 V Do | main /ca_ppm/domains/CSK_PRJ_Management | | ~ |
| > 🖺 Projects | Fields Filters | | |
| Text Design | < Back Next > Finish | Cancel | |

| Data Source | |
|--|---------------------------------------|
| ⁸ Connection timed out: connect | |
| Data Adapter Domain JRS - Query Exe | cutor adapter |
| | in /ca_ppm/domains/CSK_PRJ_Management |



Selecting The Domain

- 5. In the left explorer, expand the sets to populate the fields.
- 6. Click and drag the field to either the Fields of Filter folder on the right explorer
- 7. Click Next
- 8. Move the fields you want to bring into your report to the right explorer.
- 9. Click Next
- 10. Move the fields you want to group your data by in the report to the right explorer
- 11.Click Finish

| 📎 New Report Wizard | | | | | | — | | × |
|--------------------------------------|----------------|-------|-----|------|---------|---------------------|-------|-----|
| Data Source | | | | | | | | |
| | | | | | | | | |
| Data Adapter Domain JRS - I | Domain JRS | | | | | | ~ | New |
| Server Clarity 12 V Do | main /ca_ppm/d | omain | s/C | SK_P | RJ_Man | agement | | ~ |
| ✓ | | ^ | ~ | | Fields | | | |
| Project Name | | _ | - | | | jects.Project Name | | |
| Project ID | | | | | | jects.Project ID | | |
| Description | | | ~ | U | Filters | | | |
| Project Manager Start Date | | | • | | Proj | ject ID Equals NULL | | |
| Finish Date | | | | | | | | |
| Finish Date | | | | | | | | |
| > Custom | | | | | | | | |
| > Ceneral | | | | | | | | |
| > Portfolio | | ~ | | | | | | |
| | | | | | | | | |
| Text Design | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| ? | < <u>B</u> ack | | No | xt > | | Finish | Cance | st. |
| | < Dack | | He | xt > | | Lunsu | Cance | |

| 🗞 New Report Wizard | _ | | \times |
|---------------------------------------|--|------|----------------------------|
| Fields | | | |
| Please select dataset fields | | | |
| Dataset Fields ■projects.projectID | >>> <Fields ■ projects.projectName | | <u>U</u> p <u>D</u> own |
| | | | |
| ? | < <u>B</u> ack <u>N</u> ext > <u>F</u> inish | Cano | cel |

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Part II: Creating A Crosstab ✓ How to create a crosstab ✓ How to create a Table



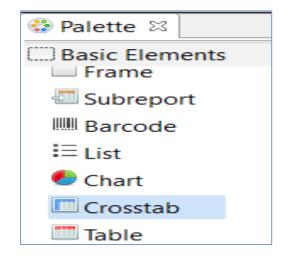
Creating A Crosstab

 Crosstabs allow the report designer to create a table that will expand based on the quantity they want their measure to populate from. A common example is Time by Month for a project.

Follow the steps below to create a crosstab

- 1. From the pallete , drag over the Crosstab element
- 2. Select the dataset that the crosstab will use to be populated
- 3. Click Next

| 🗞 Crosstab Wizard | | | | | | × |
|-----------------------------|--------------------|---------------------|----------|--------|-------|---|
| Dataset | | | | | | |
| Please select or build a da | taset that will be | e used for this con | nponent. | | | |
| O Create a Crosstab using | a new dataset | | | | | |
| | | | | | | |
| Create a Crosstab using | an existing datas | set | | | | |
| [Main Dataset] | | | | | ~ | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
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| (?) | | < Back | Next > | Finish | Cance | |
| | | < DdCK | ivext > | FINISH | Cance | |

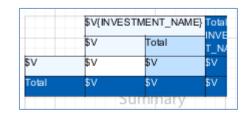




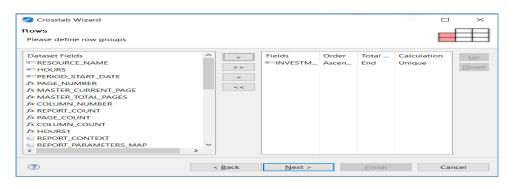
Creating A Crosstab

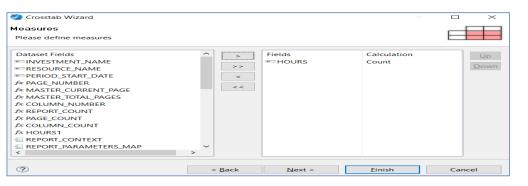
- 1. Select the column attribute(s) and bring the field(s) over to the right section
- 2. Click Next
- 3. Select the row attribute(s) and bring the field(s) over to the right section
- 4. Click Next
- 5. Select the measure attribute) and bring the field(s) over to the right section
- 6. Click Finish
- Query:

http://jaspersoft.regoconsulting.com/2017/Advanced_Queries.txt



| 🧞 Crosstab Wizard | | | | | \times |
|--|--------|----------------------------|---------------------|---------------------------------|----------|
| Columns Please define column groups | | | | E | |
| Dataset Fields HOURS HOURS A MASTER, CURRENT, PAGE A MASTER, CURRENT, PAGE A MASTER, COTAL, PAGES A COLUMN_NUMBER A REPORT_COUNT A FAGE, COUNT A FOOLS HOURS1 A REPORT_OPAMATERS, MAP ASPER, REPORTS, CONTEXT ASPER, REPORT | | Fields RESOUR PERIOD | Total End End | Calculation Unique Unique | Down |
| 0 | < Back | Next > | Finish | Ca | ncel |





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Creating a Table

- Tables can be used to show the summary of the report in table format. For Tables we can choose the report summary, because it is printed at end of the report and can be used to easily view aggregated data.
- Follow the steps to create a Table
 - 1. From the pallete , drag over the Table element
 - 2. Select the dataset that the crosstab will use to be populated
 - 3. Click Next
 - 4. Select 'Use Same JDBC connection used to fill master Report' to set data source for the Table

| 😳 Palette 🖂 | Dataset | Connection |
|----------------------|--|--|
| Basic Elements | Please select or build a dataset that will be used for this component. | Please select the connection |
| Subreport | Create a Table using a new dataset | Use same JDBC connection used to fill the master report Use another connection |
| Barcode | Create a Table using an existing dataset Dataset1 ✓ | \$P(REPORT_CONNECTION) |
| i≡ List | | Use an empty Data Source Use a JRDatasource expression |
| 🗲 Chart | | |
| Crosstab | | |
| Table | | |
| 🔜 Мар | | O Don't use any connection or Data Source |
| left Spider Chart | | |
| Custom Visualization | (?) < Back Next > Finish Cancel | Image: Second |



Creating a Table

- Select the Table Column Fields attribute(s) and bring the field(s) over to the right
- 2. Click Next
- 3. Select the layout Color
- 4. Click Finish

| Select the fields of the datase selected, the table will be cre | t that will be used to produce table columns. If no fi ated without any column. | elds are | |
|--|--|----------|-------|
| Dataset Fields | >>> Fields = TASKS = LABEL < < | | I |
| (?) | < Back Next > | Finish | Cance |

| TASKS | LABEL | |
|------------|------------|--|
| \$F{TASKS} | \$F{LABEL} | |
| | | |
| | | |

| 2 Table Wizard | | | \sim |
|--|------------------------|-------|--------|
| ayout | | | |
| Please select layout | | | |
| Cell Colors | Style preview | | |
| Table Header Column Header | | | |
| Detail Alt. Row Detail Use alternated detail rows background | | | |
| Colors by Schema | | | |
| Color scheme Color scheme | | | |
| Variations Default ~ | | | |
| Cell borders | | | |
| Borders color Borders style | | | |
| # #000000 | | | |
| 🖂 Add Table Header 🖂 Add Column Head | der 🗹 Add Group Header | | |
| 🗹 Add Group Footer 🗹 Add Column Foot | er 🗹 Add Table Footer | | |
| | | | |
| | | | |
| (?) | < Back Next > Finish | Cance | |



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Questions?





- Tips and Tricks
 - Markup Language
 - How to set Defaults on parameters
 - Add Jaspersoft to an iFrame

Part III Agenda

Part III: Markup Language

✓ Demo



Markup Language

- Markup is a style choice that allows you to apply style inside the expression.
- Ex: <u>http://community.jaspersoft.com/questions/534014/use-style-text-expression</u>
- To do this follow the steps.
- Navigate to the properties of the textfield
- Make sure to select the markup language to use.

| □ Font | |
|-----------------|-------------|
| SansSerif | ✓ I ✓ A- A- |
| B I U S | |
| Markup styled ~ |] |

- Once this is applied you can apply the selected markup in your textfield expression.
 - 1. Example: I want my field "name" to be bold. I am using the markup "Styled".

```
• "<style isBold='true'>" + $F{NAME} + "</style>" + " - " + ($F{SR_UPDATE} != null ?
    $F{SR_UPDATE} : "No Update")
```



Part III: How To Set Defaults On Parameters

✓ Demo



How To Set Defaults On Parameters

- Defaults on parameters will auto-fill a value in a particular parameter. Setting up parameters with defaults requires knowing the data values being passed to the report.
- How to set up a single and multi-select value(s) default
 - 1. Navigate to the outline
 - 2. Expand the Parameters list
 - 3. Right click on the parameter
 - 4. Click Show Properties
 - 5. Click the expression edit for the Default Value Expression
 - 6. In the expression for a single value fill out the **value** for the default. This **value** should be the back end value that is being passed from the parameter.
 - Ex. Resource_key vs Resource_name
 - 7. In the expression for a multi value convert the values into an array list. To do this follow the template below.
 - new ArrayList(Arrays.asList(VALUE1,VALUE2))

| 🗖 Properties 🛛 🗖 Proble | ms | | \bigtriangledown | |
|--------------------------|-----|-----------------|--------------------|---|
| 🗄 Parameter: INV_K | EY | Search Property | | • |
| 📼 Object 🔲 Advanced | | | | |
| Name resourceKey_1 | | | | |
| Class java.math.BigDecir | mal | | | |
| Description | | | | _ |
| ✓ Is For Prompting | | | | |
| Default Value Expression | | | \sim | l |

| 🗏 Properties 🛿 🗖 Proble | ems | | \bigtriangledown | | |
|--------------------------|--------|-----------------|--------------------|----|---|
| Parameter: INV_ | (EY | Search Property | | | • |
| Object Advanced | | - | | | |
| Name resourceKey_1 | | | | | |
| Class java.math.BigDeci | imal | | |]. | |
| Description | | | | | _ |
| ✓ Is For Prompting | | | | | |
| Default Value Expression | 500001 | | $\hat{}$ | 6 | 2 |

| 🗖 Properties 🛛 🗖 Proble | ms | 1 | ~ ' | - 0 |
|----------------------------|---------------------|----------------------------|--|-----|
| 🖾 Parameter: INV_K | EY | Search Property | | r |
| Object Advanced | | | | |
| Name resourceKey_1 | | | | |
| Class java.util.Collection | | | | |
| Nested Type Name | | | | |
| Description | | | | |
| ✓ Is For Prompting | | | | |
| Default Value Expression | new ArrayList(Array | s.asList(5000001,5000002)) | $\hat{\boldsymbol{\boldsymbol{\omega}}}$ | |



Part III: How To Add Jaspersoft To An Iframe

✓ Demo



How To Setup An Iframe With Jaspersoft

Setting up an Iframe to contain Jaspersoft allows for the user to create visible view for a Jaspersoft report in a tab on an object or page in clarity.

1. Extracting the link parameter (This all goes in an HTML portlet). This method only pulls one parameter, if you need multiple, it would be an easy change:

```
<script>
var str = window.location.href;
var key = "";
vars = str.split("&");
for (var i=0;i<vars.length;i++) {
var pair = vars[i].split("=");
if (pair[0] == "id") {
key = pair[1];
}
}
</script>
```

2. We can now add the following line inside the "script" tags, after the above code, to update the iFrame source location. In this example, we're linking to a quick project list report, passing the parameter projectKey_1 and updating the iFrame with id "HTMLID":

document.getElementById('projectList').src = 'https://cppm1080-

dev.ondemand.ca.com/reportservice/flow.html?_flowId=viewReportFlow&standAlone=true&decorate=no&ParentFolderUri=/users/regoconsulting/reports/ProjectList&projectKey_1=' + key;

3. The iFrame line for the HTML Portlet:

<iframe id="HTMLID" width="1024" height="600" src=""></iframe>

Note: Not hard coding the iframe size results in poor sizing for the report



Questions?





Appendix

✓ Items of Interest



Connecting To Jaspersoft Mobile

- To connect to the Jaspersoft Mobile app follow the steps
- 1. Tap the TIBCO JasperMobile icon.
- 2. Complete the following information and tap Login
- 3. <u>Username</u> The username to log in to CA PPM.
- 4. <u>Password</u> The password to log in to CA PPM.
- 5. Server URL The server url that is used to log in to TIBCO JasperMobile. Example: https://<PPM Hostname>/ppm/mobile



- 6. Click the "+" button in Server Profiles to add an account in the mobile app to connect to the CA PPM server. Complete the following information and click Save
- 7. Profile name Specify the name of your profile. You can specify any profile name that you want.
- 8. Server address
- 9. Organization ID (Not Required) CA PPM automatically identifies this value based on the Server URL, Username, and Password provided.
- 10. Automatically extend the session
- 11. Select the added profile and click Login.

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Items of Interest

- Use free layout to avoid Jaspersoft Studio reformatting your report
- Use a standard parameter and variable naming conventions
- Maintain the same folder structures locally when developing for easy report migration
- Create multiple detail bands if you have multiple charts
- Frequently build and clean the cache of the project in Studio to avoid inconsistencies and issues
- Maintain a centralized location for report resources such as images, sub-reports, queries, input controls with the JasperServer repository to promote reusability
- Ensure the data warehouse is refreshed regularly, as OOTB Jaspersoft components like reports and input controls are heavily dependent on it

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Items of Interest

- There is no known limit to the number of nested subreports
- Layered domains is not possible in Jasper like in Business Objects
- Audit Trail and chargebacks information is not available in OOTB domains
- Report errors will show up on the Jaspersoft Server logs
- Custom date fields can be displayed only in Date format in adhoc reports. Use query in custom domain to get Date in Date Time format
- Multiselect valued parameters can be defined for a subreport

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