regoUniversity 2019

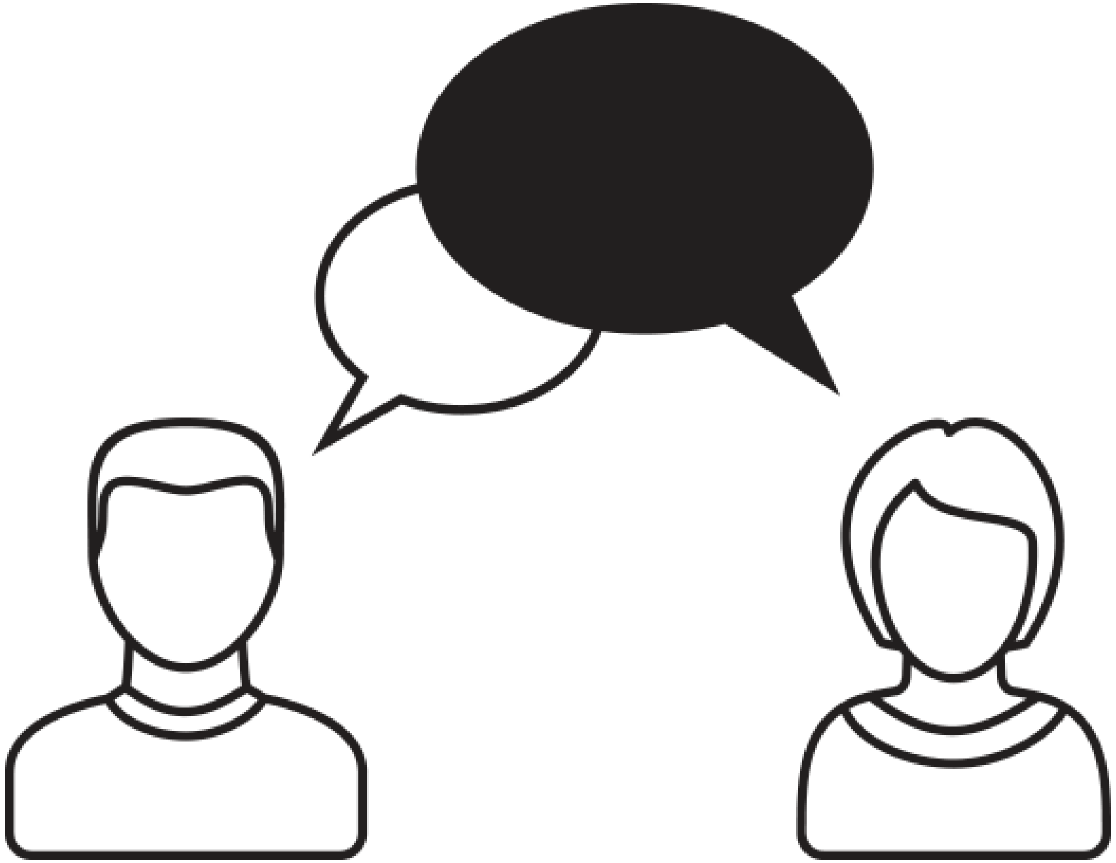
SAN DIEGO

# Jaspersoft
# Ad Hoc| Beginner

Your Guides: Robert Newell and Atul Kunkulol

# Introductions

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



# Course Outline

- Overview
  - What is Jaspersoft
  - How does Jaspersoft Work
  - Differences between CA PPM Versions 14.2 and 14.3
- Accessing Advanced Reporting
  - Advanced Reporting Navigation
- Running a Report
  - Accessing and Running an out of the Box (OOTB) Report
- Running an Ad-Hoc Report
  - Accessing and Running an Ad-Hoc Report
- Saving and Accessing a Saved Ad-Hoc View/Report
  - Saving an Ad-Hoc View/Report
  - Accessing a saved View/Report
- Creating a Cross Tab View
  - Creating a Cross Tabbed Report
- Creating a Chart
- Creating a Dashboard
  - Creating a Dashboard Report
- Scheduling a Report
  - Creating a schedule
  - Setting the report parameters
  - Defining the output format
  - Sending report notification
- Appendix

# Session Goal and Objectives

**Course Goal**: To provide an overview of Jaspersoft functionality in conjunction with CA PPM.

**Course Objectives**: You will learn how to:

- Understand How JasperSoft Works
- Access Advanced Reporting
- Access and Run a Pre-Existing Report
- Access and Run an Ad-Hoc Report
- Save and Access a Saved Ad-Hoc View/Report
- Create Dashboards, Charts and Cross Tab Views
- Schedule a Report

# Overview

- What is Jaspersoft
- How does Jaspersoft Work
- Differences between CA PPM Versions 14.2 and 15.3

# What is Jaspersoft?

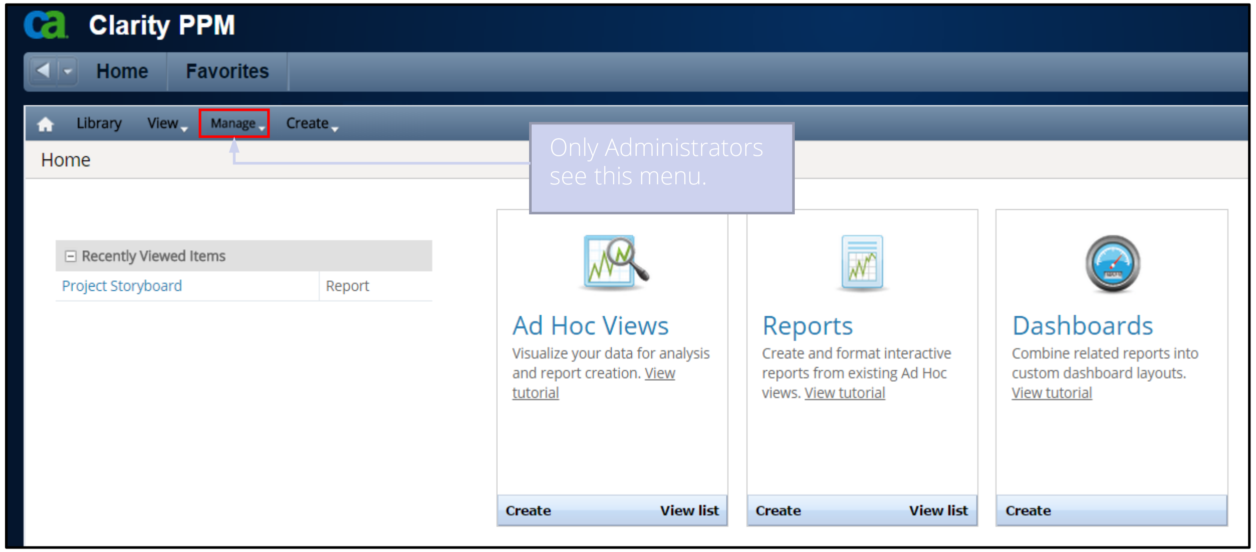
- Jaspersoft is a reporting software that takes information from CA PPM to provide easy to read, highly interactive reports for users.
- Jaspersoft is a rights based reporting system. The capabilities of the Advanced Reporting in CA PPM is dependent on what security users are granted.
- Jaspersoft reporting 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.

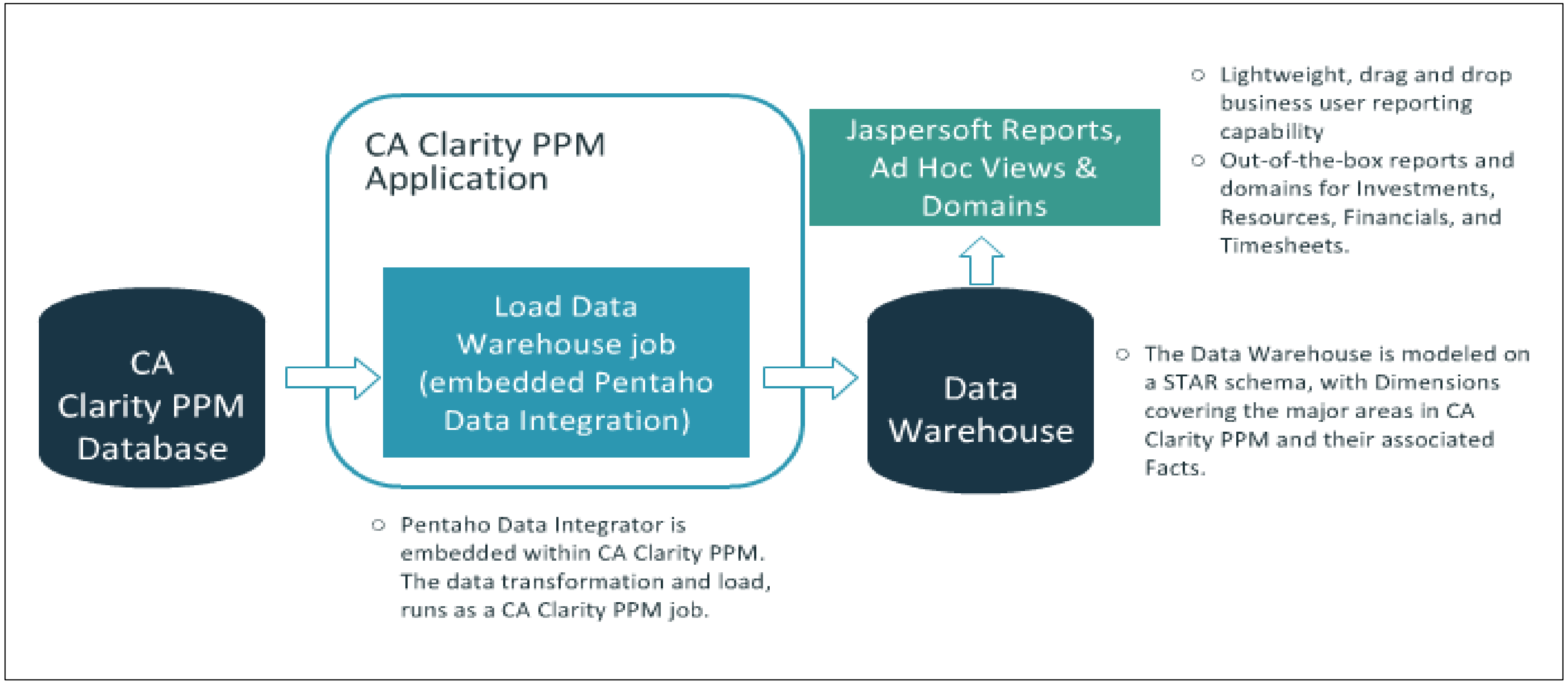
- Advanced Reporting - Ad Hoc Create
- Advanced Reporting - Dashboard Create
- Advanced Reporting – Navigate

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.

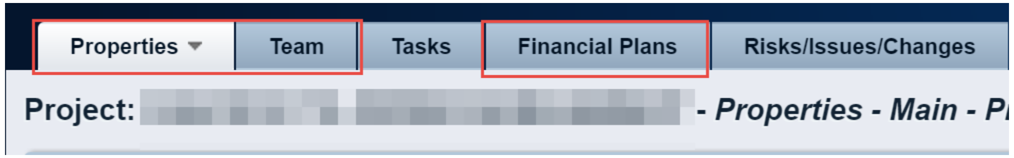
- Investment Management
- Project Management
- Idea Management
- Custom Master Objects
- Resource Management
- Time Management
- Financial Management
- Application Management

# Investment Management Domain

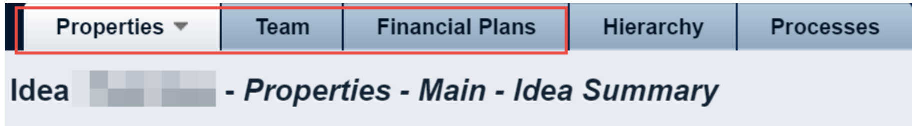
The investment management domain will only show data that is shared between the idea and project. If an attribute gets carried over when converting from idea to project, that attribute will be in this domain.

The following tabs will be available in the Investment Management domain

Project:




Idea:

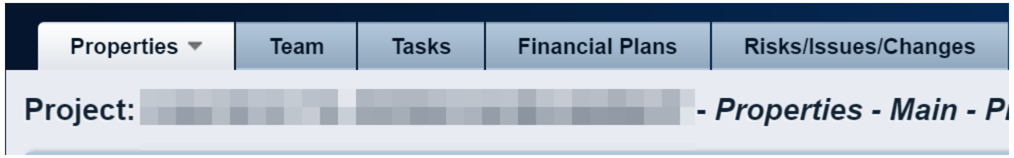


# Project Management Domain

## 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.

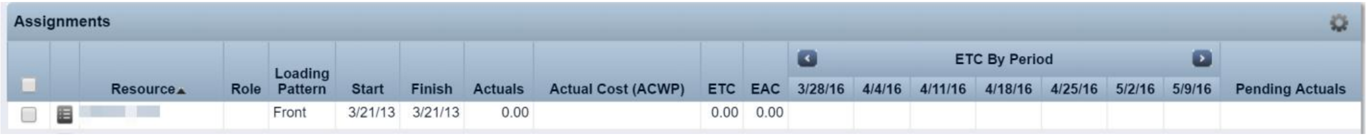
The following data in CA PPM is available in the project management domain

Project:




Task:

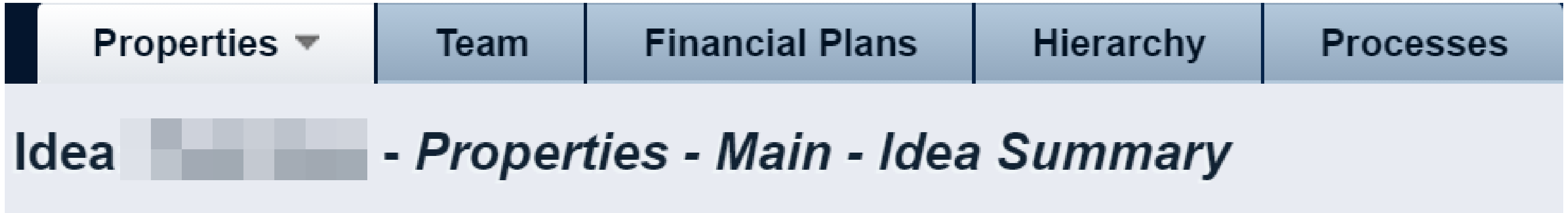

Assignment:



# 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

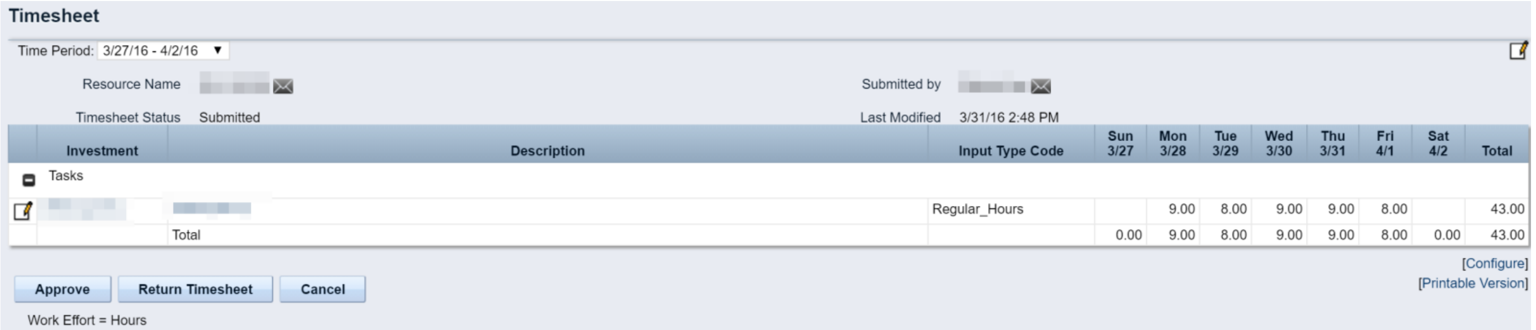
## The resource management domain will only show data that is directly on the resource.

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

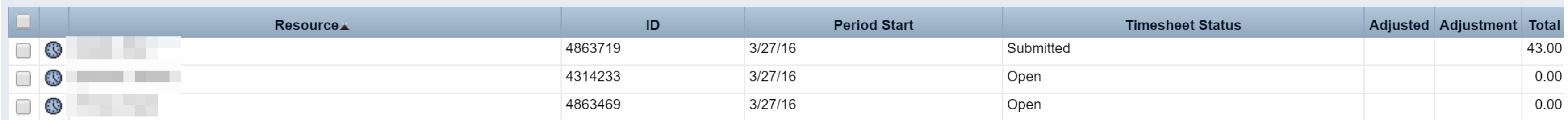
Resource Name | Submitted by
Timesheet Status: Submitted | Last Modified: 3/31/16 2:48 PM

| 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

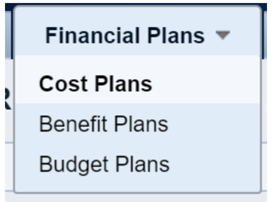


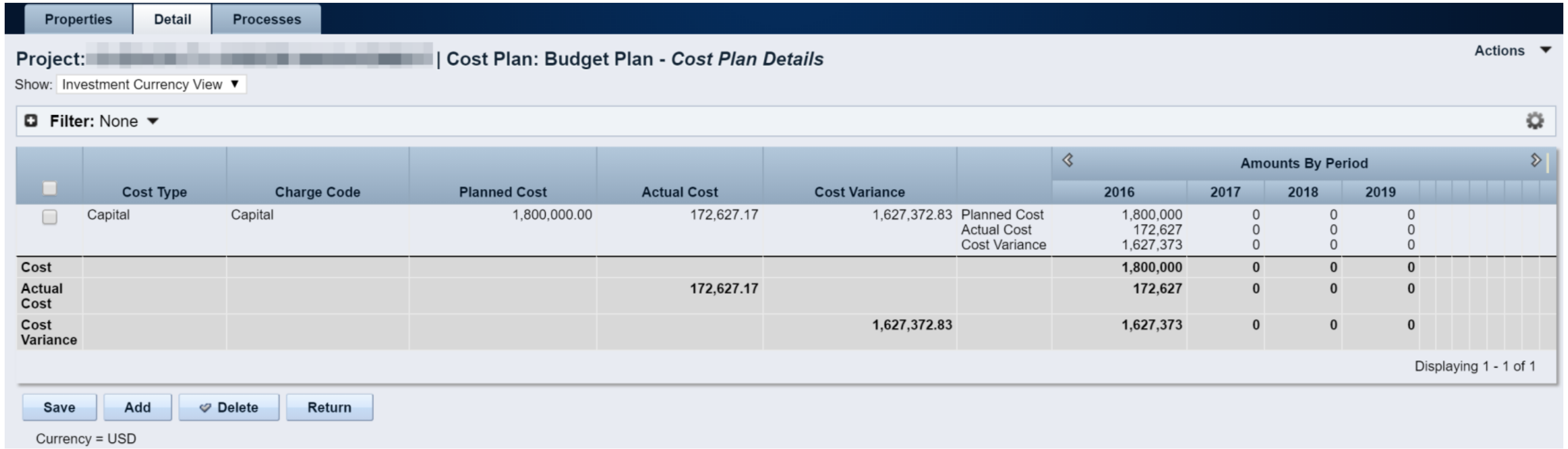
| Resource | ID | Period Start | Timesheet Status | Adjusted | Adjustment | Total |
|---|---|---|---|---|---|---|
| | 4863719 | 3/27/16 | Submitted | | | 43.00 |
| | 4314233 | 3/27/16 | Open | | | 0.00 |
| | 4863469 | 3/27/16 | Open | | | 0.00 |

# 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



# Accessing Advanced Reporting

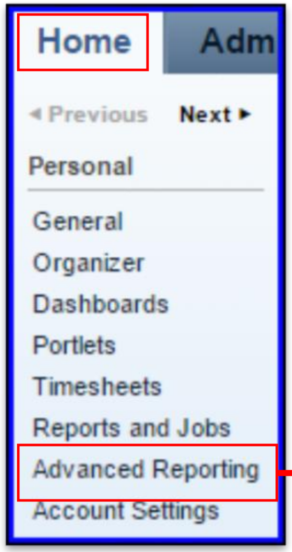
- Advanced Reporting Navigation

# 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. |

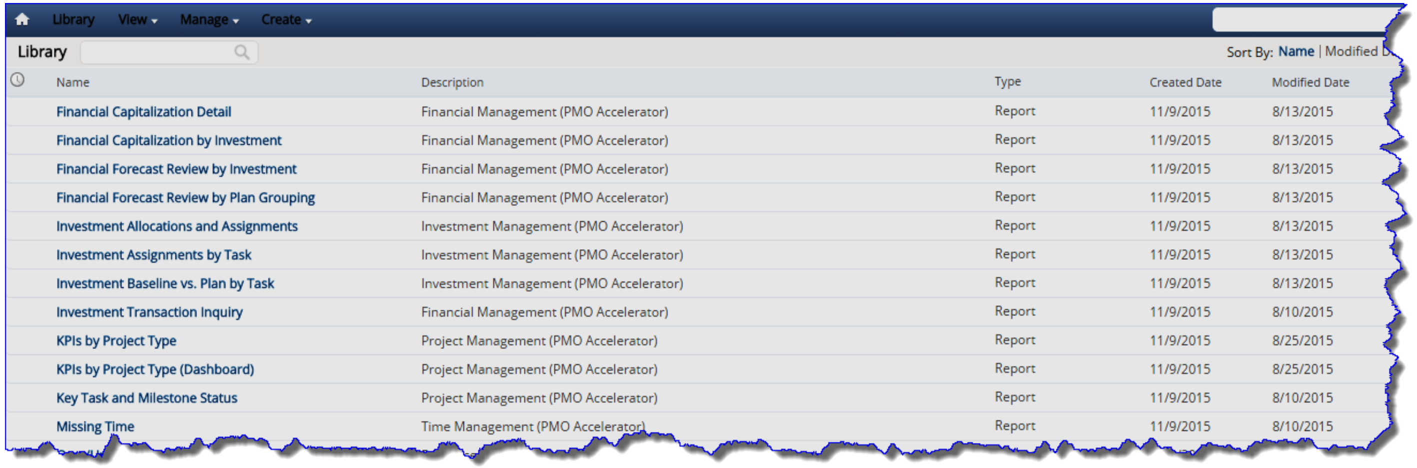
# Advanced Reporting Menu Structure



| | 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.




| 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.
- **Schedules:** displays a lit of scheduled reports, along with relevant details around owner, schedule, etc.
- **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 - Administrator Use:** displays a list of users, allowing an administrator to add or remove assigned roles
- **Roles – Administrator Use:** displays a list of roles, and their members.  Also allows for the creation of new roles to be managed within Jaspersoft

# 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.

Home

▾ Recently Viewed Items

| | |
|---|---|
| Project Risk Register | Report |
| Project Risk Register | Report |
| Investment Transaction Inquiry | Report |
| Ad Hoc View cjf | Ad Hoc view |
| Project Status Report List | Report |
| Project Status Detail | Report |
| Project Issue Register | Report |
| Capacity vs. Demand by Resource | Report |
| Financial Capitalization Detail | Report |

## Administrators

Admin

Data Sources Or Domains

## Functional Users

Reports

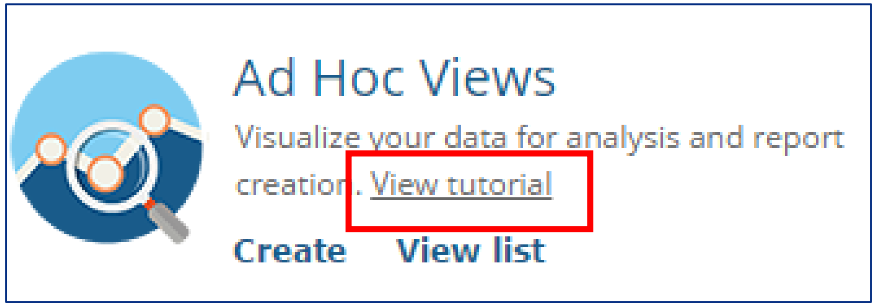
Ad Hoc Views

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

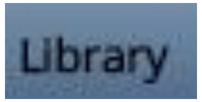
# Running a Report

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

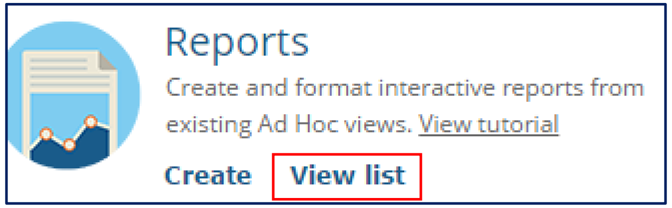
# Accessing Reports

Reports can be accessed three ways:

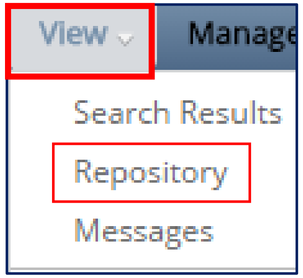
- **Advanced Reporting Menu > Library**




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



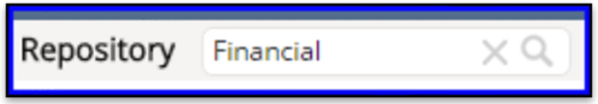

- Click **View > Repository**

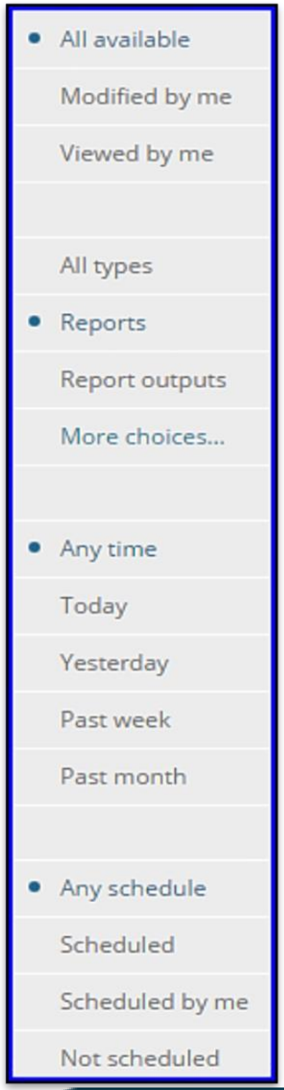


# Report Section

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).

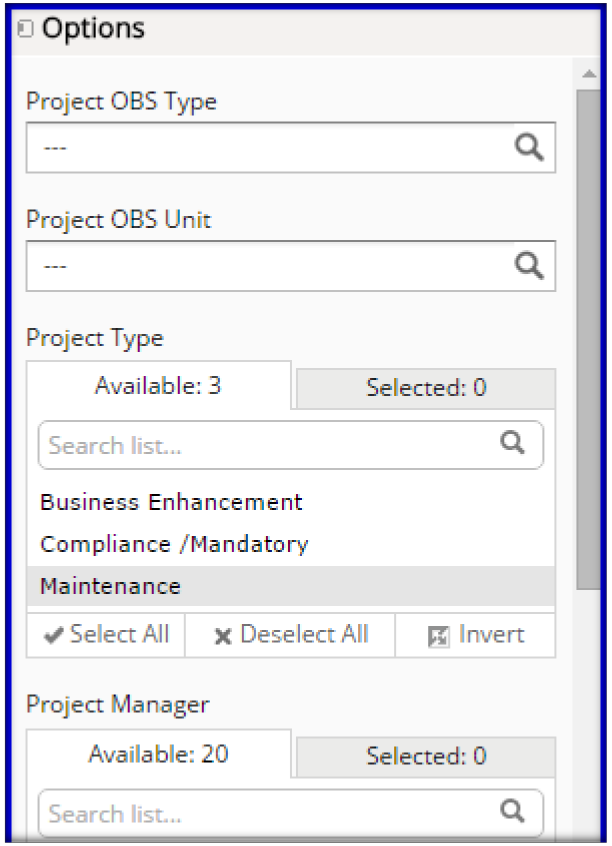


# Running a Report

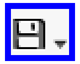
When a Report is selected from the list  the report screen will display without results.

- **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.

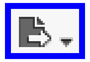


# Report Menu Structure


**Navigates** to the previous screen.



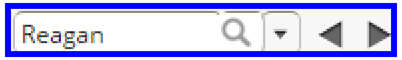
**Save** the report if changes were made.



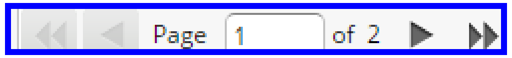
**Save** the report in a different format: PDF, XLS, XLSX, CSV, DOC X, RTF, ODT, ODS, or PPTX.

**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: Overview of a Report

# Overview of an Ad-Hoc Report

✓ Accessing and Creating an Ad-Hoc Report

regoUniversity 2019
SAN DIEGO

Let Rego be your guide.

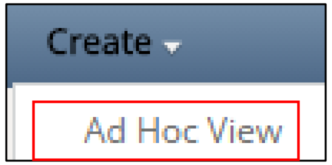
# Ad-Hoc Views

- 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 three 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

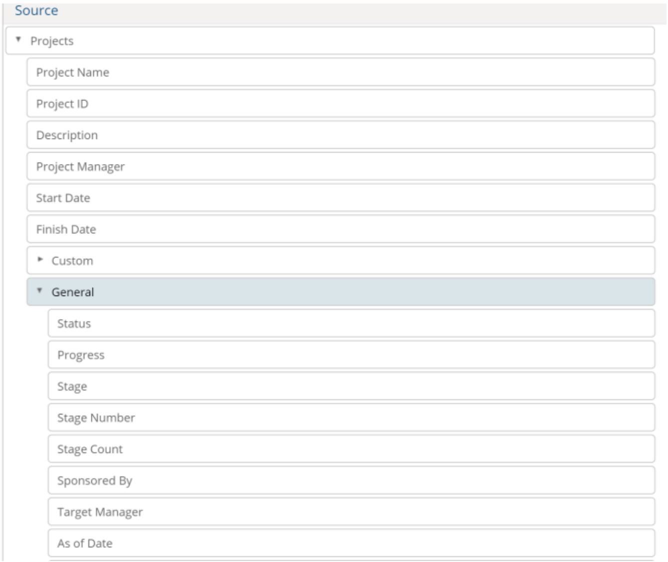
Domains are a specific set of CA PPM components that are related to the modules in CA PPM. A Domain provides a business view of the CA PPM Data Warehouse.

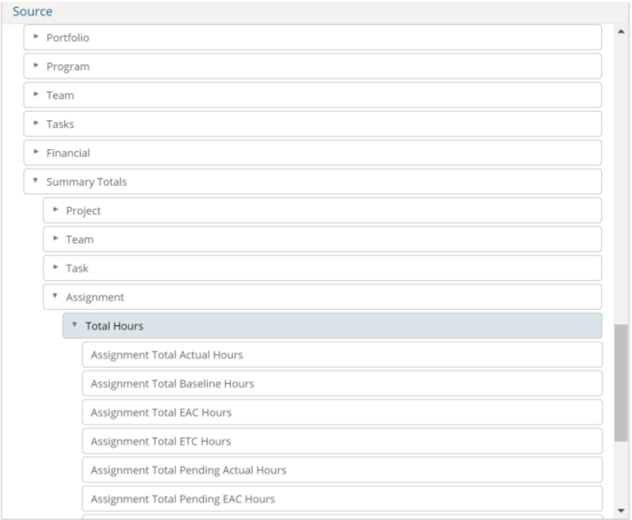
- Out of the Box Domains are:
  - Application Management
  - Custom Master Objects
  - Financial Management
  - Idea Management
  - Investment Management
  - Project Management
  - Resource Management
  - Time Management
- Ad-Hoc reports require the selection of a single **Domain** from which the CA 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 include fields and measures.
  - Fields are the qualitative information.
  - Measures are the quantitative information.



# Selecting a Domain

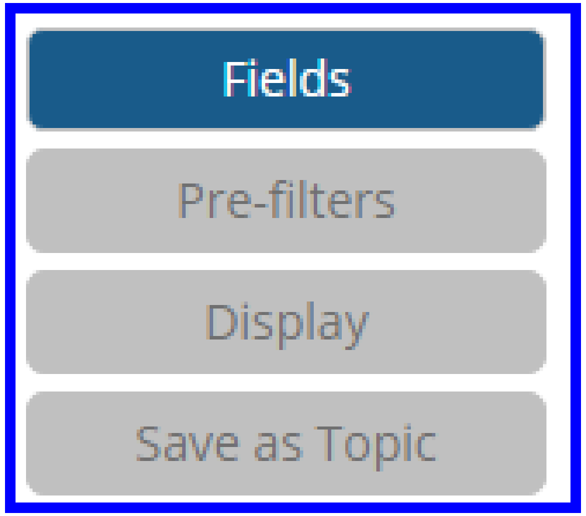
In order to create an Ad-Hoc report the user must select **ONE** domain.

- **Note:** Advanced Reporting does not allow the selecting of more that 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

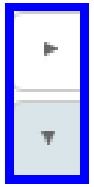
The Ad-Hoc choose data screen will display three main sections.

- 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**

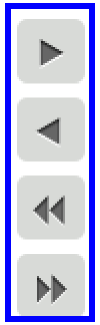


# Choose Data - Fields

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

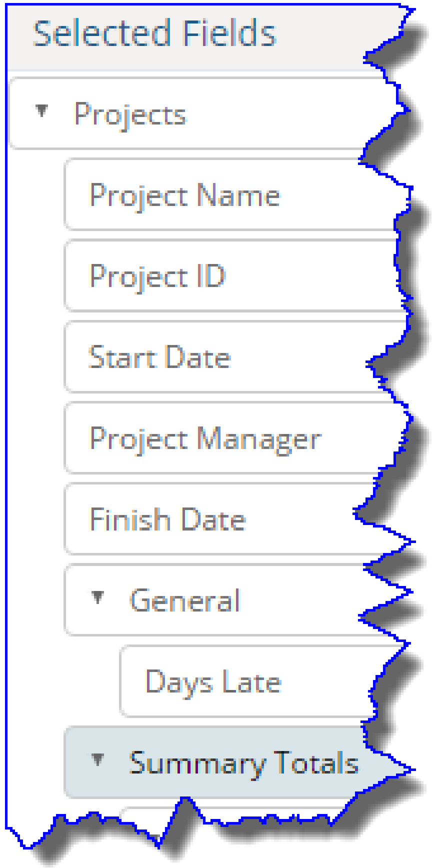


Clicking on the arrows to the left of a listed Items will expand or collapse the hierarchy of components.



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

Any unwanted items can be removed using the arrows.



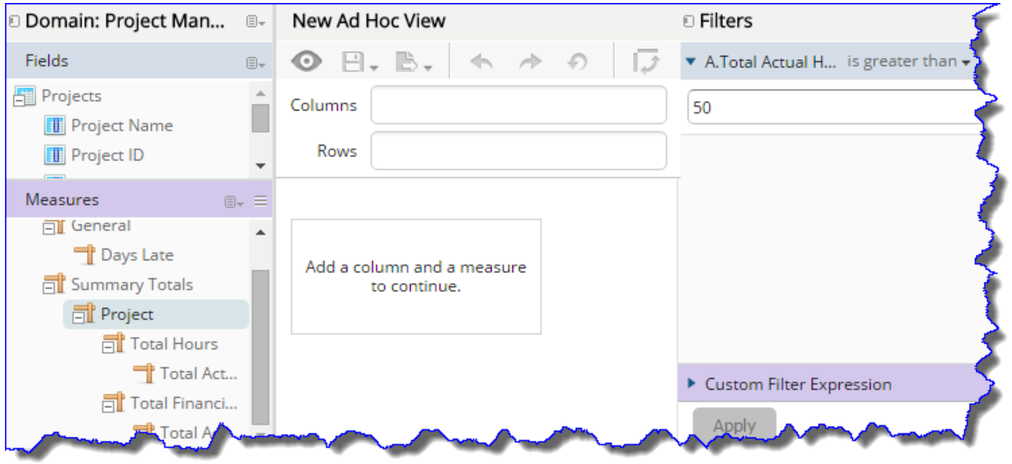
# Pre-Filters

- **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:

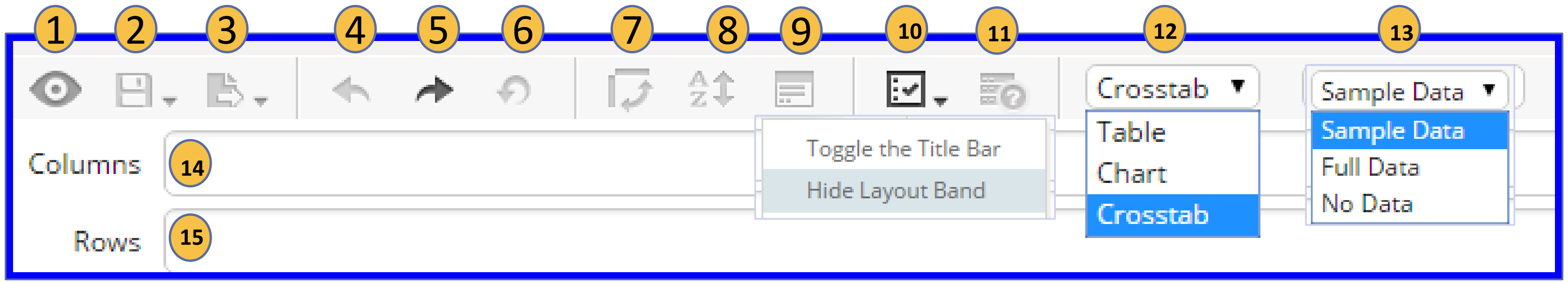
- Fields (components) that were selected from the domain.
- Measures which are fields (components) that contain calculated fields.
- New Ad-Hoc View screen where the layout of the view is created.
- Filter section that display the pre-defined filters and where other filters can be added.
- Custom Filter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



# Layout of the View (2)

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

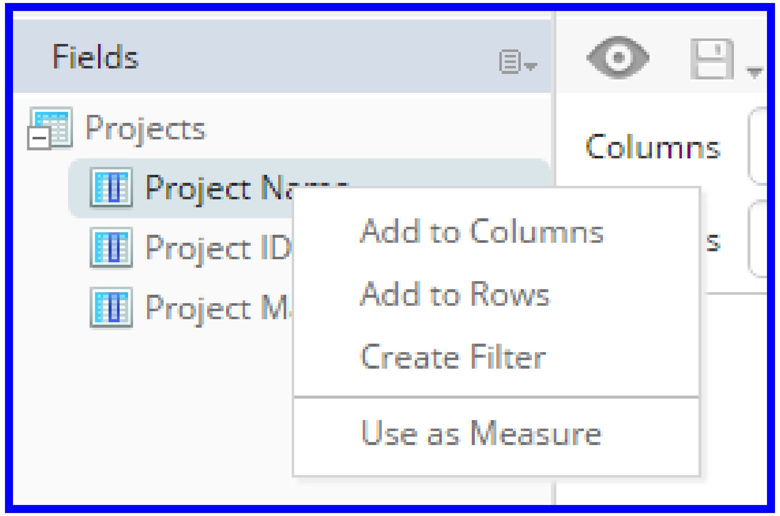
1. Toggle between design and display modes
2. Save
3. Save As
4. Undo the Last Change
5. Redo the Last Change
6. Reset the report to the last saved state
7. Switch the Groups
8. Set the Sort Order
9. Change the Input Values
10. Toggle Title Bar / Hide Layout Band
11. View SQL Query
12. Type of View
13.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

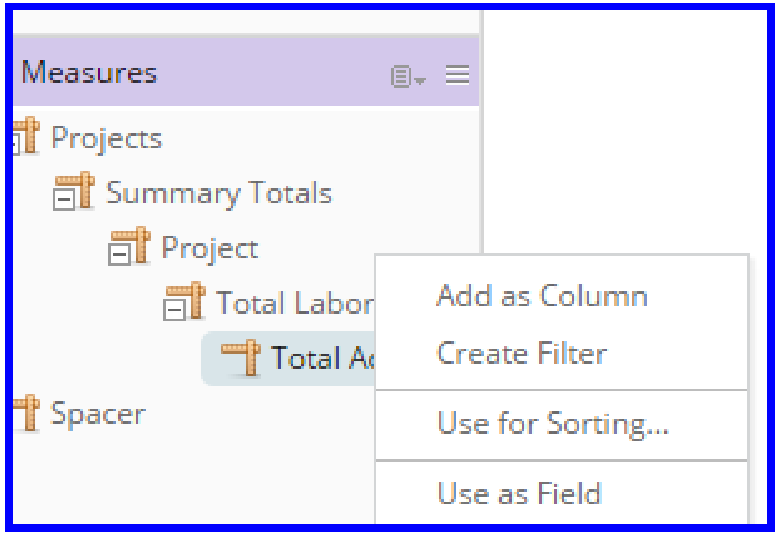


# Layout of the View (3)

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.

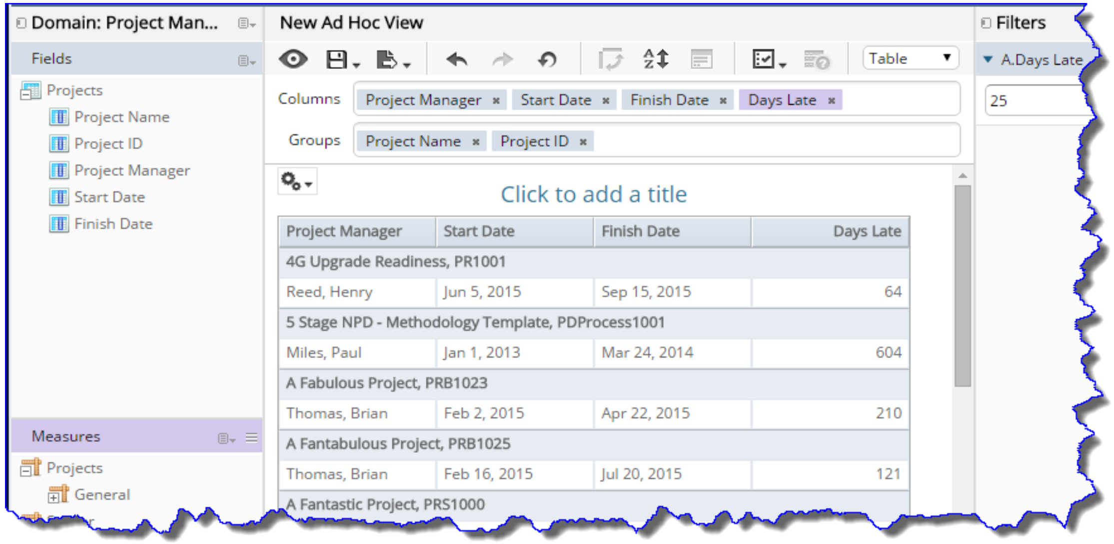


# Layout of the View (4)

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.

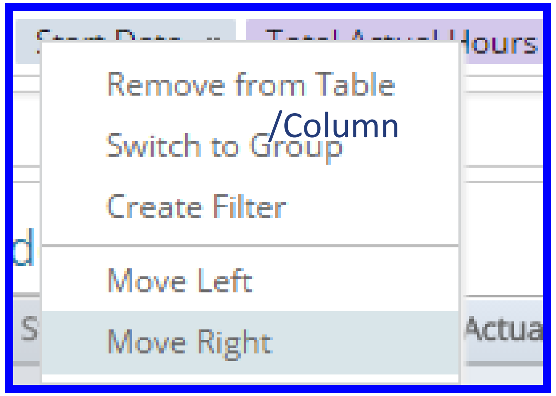
- Double-clicking on the Component will add the Component into the Column Field. The Component can be dragged into the Group field or moved into a different order.
- Sample Data results will populate immediately.



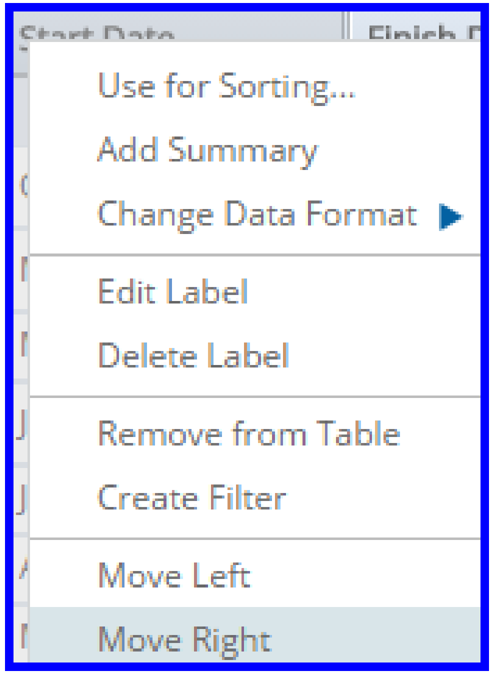
# Layout of the View (5)

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>




<u>Data</u>

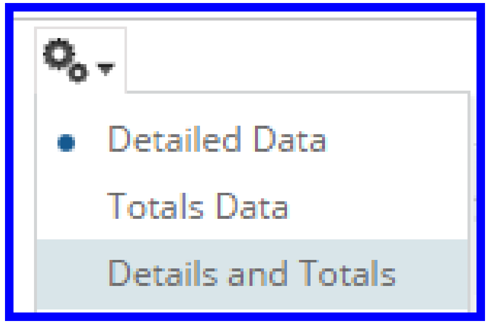


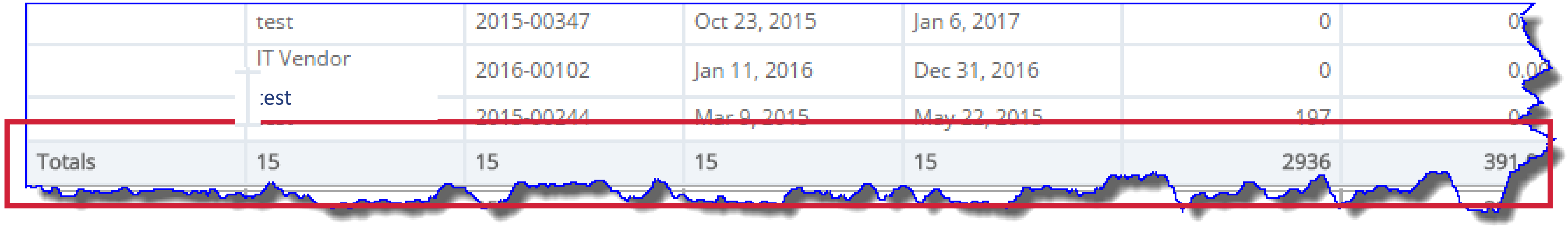
# Layout of the View (6)

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.

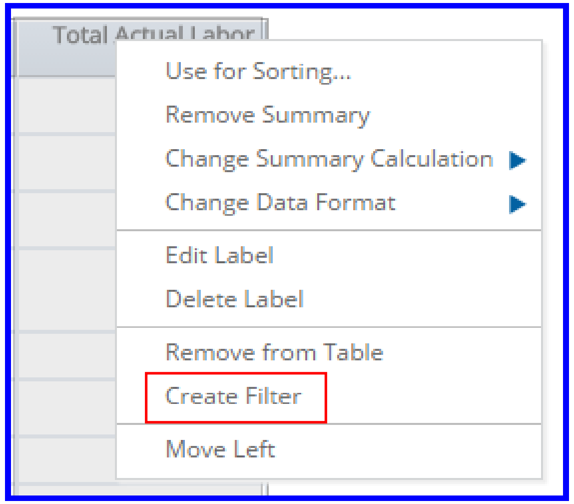
- If using Details and Totals, a Totals column will be added and values aggregated at the bottom of the view.

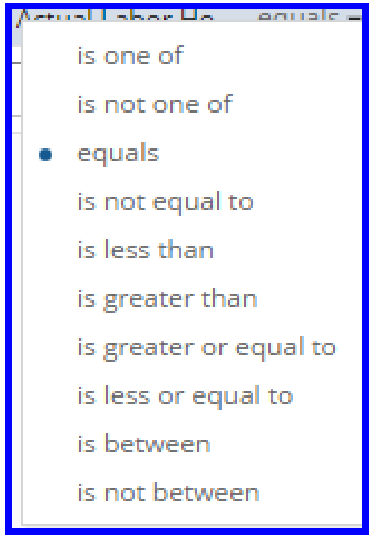


# Working with Filters

- 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: Saving an Ad-Hoc Report

# Saving and Accessing a Saved Ad-Hoc View/Report

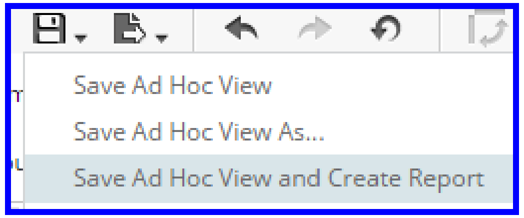
- Saving an Ad-Hoc View/Report
- Accessing a saved View/Report

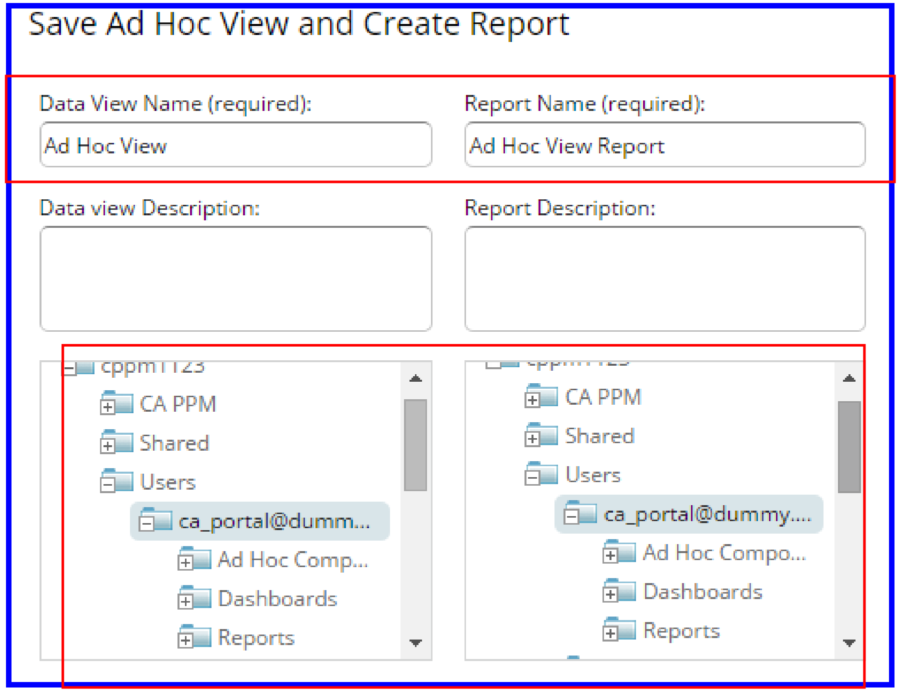
# Saving a Report

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.

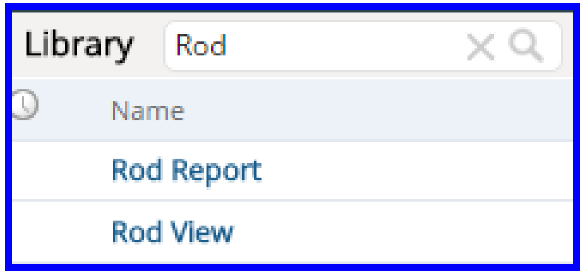


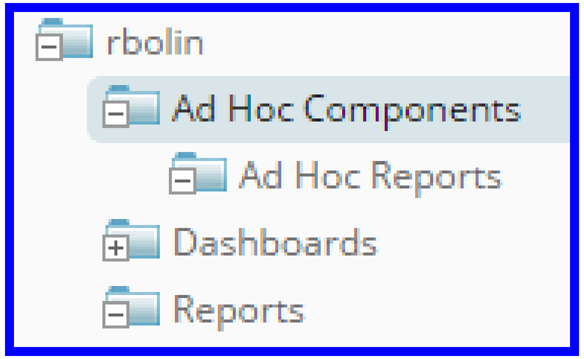

# Accessing a Saved Report

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.



regoUniversity 2019

SAN DIEGO

# Exercise 4: Creating a Report

# Creating a Cross Tab View

- Creating a Cross Tabbed Report

# 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 |

regoUniversity 2019

SAN DIEGO

# Exercise 5: Creating a Cross Tab Report

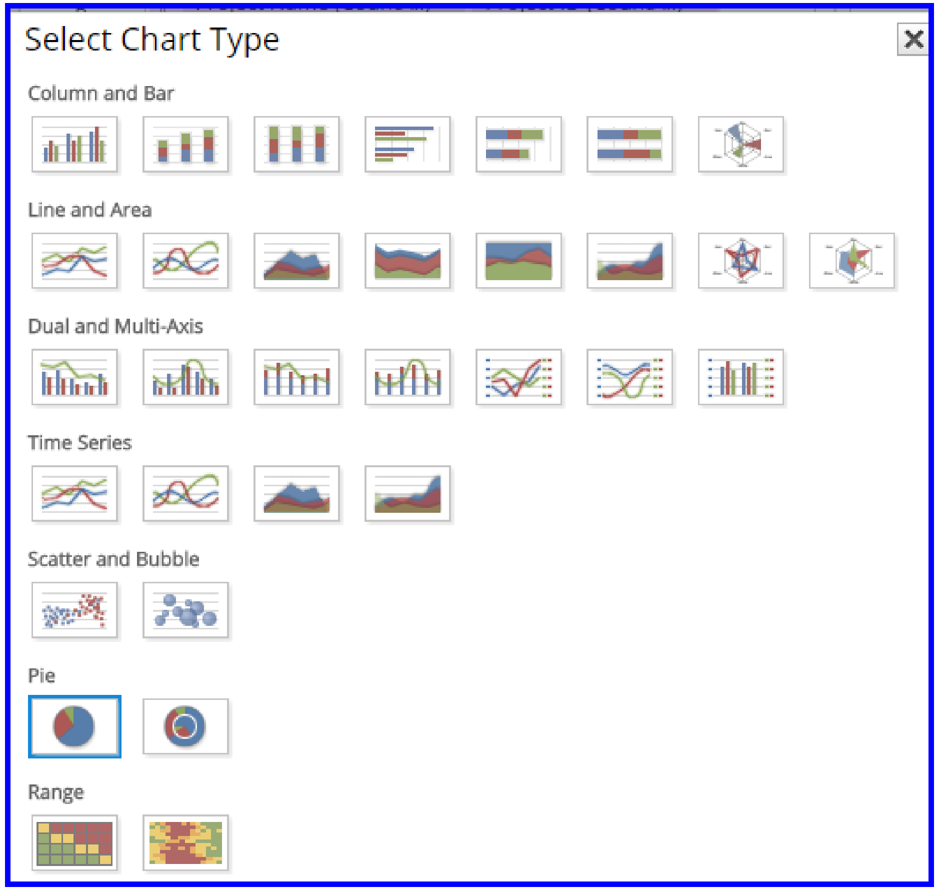
# Creating a Chart

- Creating a Chart

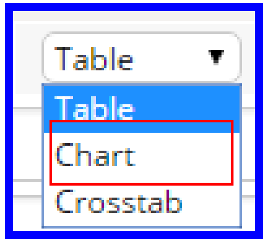
# Creating Charts

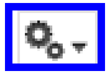
Charts are a flexible way to see data graphically.

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



# Creating Charts (2)

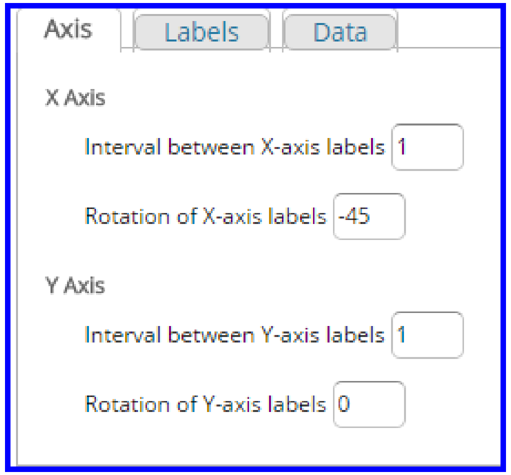


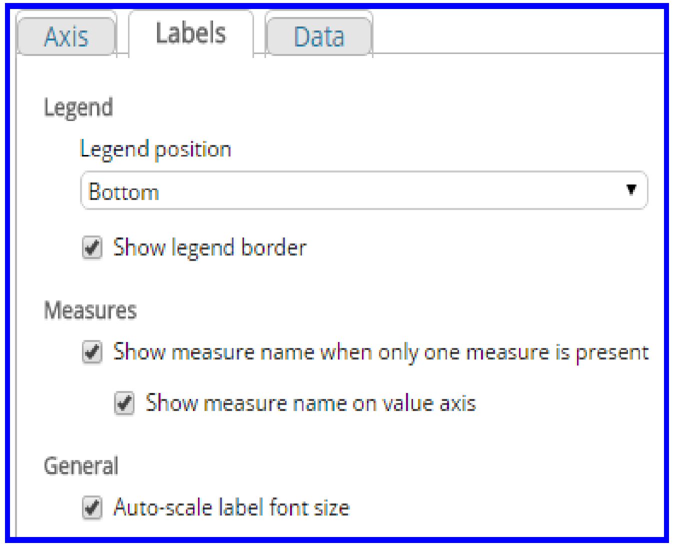

- From the Ad-Hoc View menu **select Chart** from the drop-down menu.
- The system default is to create a Column Graph.
- **Click on the**  **Icons drop-down**. The  type of chart can be modified or the chart can be future formatted.

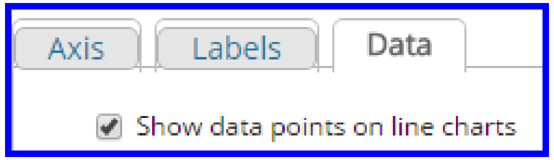
# Creating Charts (3)

Chart Formatting contains three tabs

Axis Label Data



regoUniversity 2019 SAN DIEGO

# Exercise 6: Creating a Chart

# Creating a Dashboard

- Creating a Dashboard Report

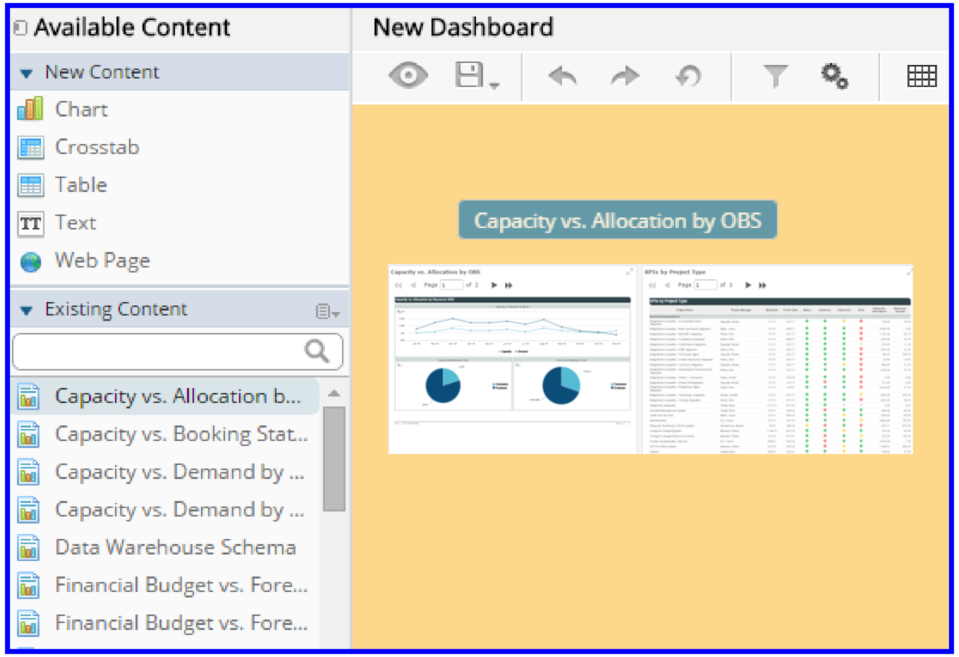
# Dashboards

- 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

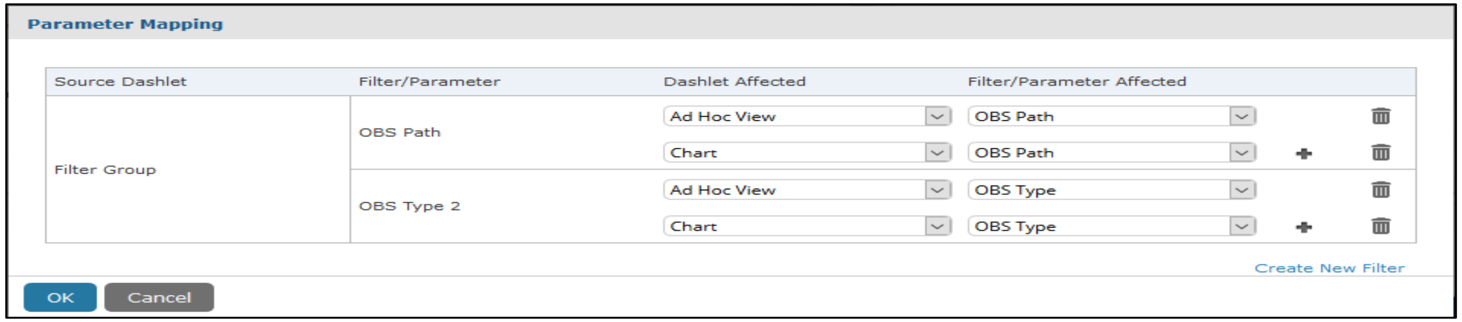
- Jaspersoft Dashboards provides the ability to display several reports in a single, integrated view.
- Combining different types of reports, creates appealing, data-rich dashboards that quickly convey trends.

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

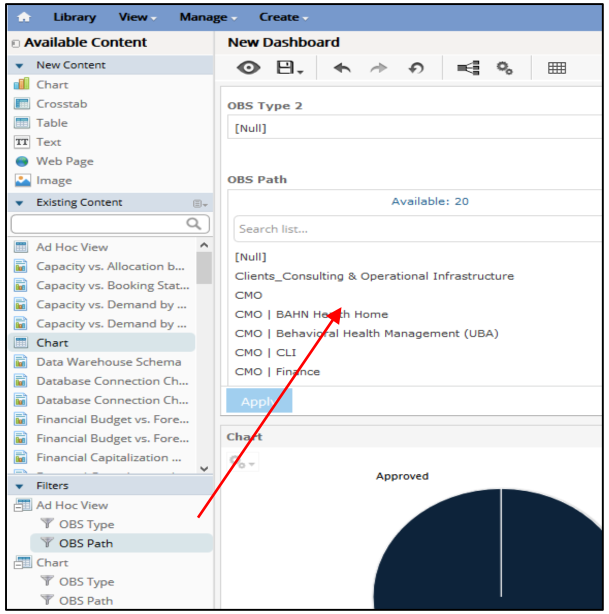


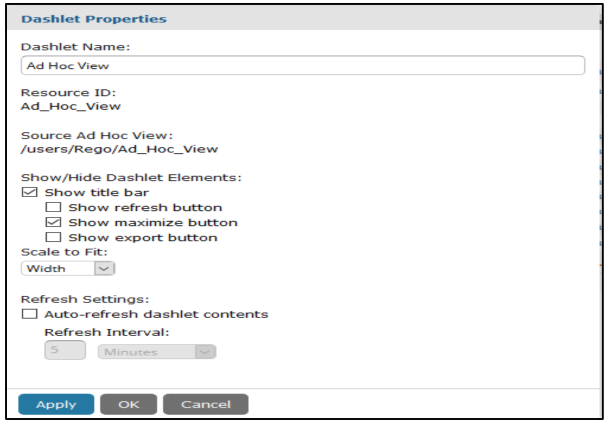
# Adding filters to Dashboard Report

- You can drag and drop the filters available on the reports on to your dashboards.
- To add mapping between parameters of different dashlets, click on to define parameter mappings.



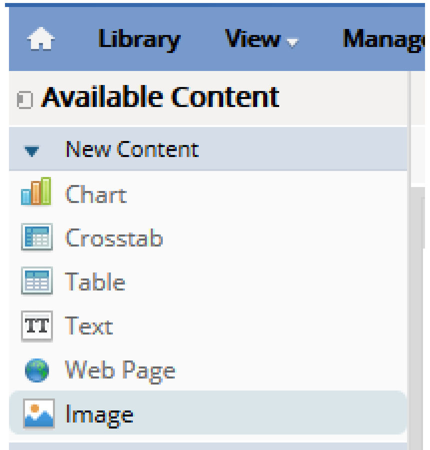

- To edit properties of any of the dashlets double click on the frame and you should get a new pop-up window to make changes.

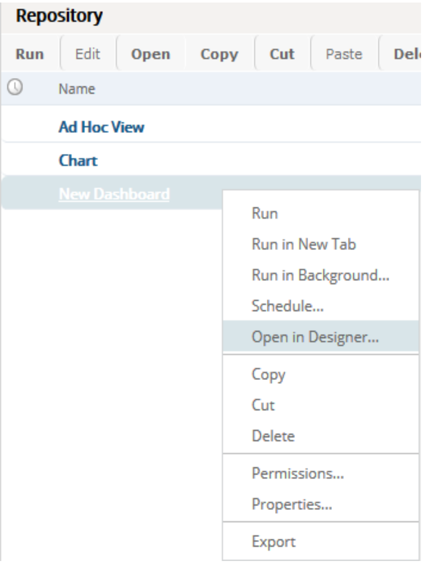


# Adding New Content to Dashboard Report

- In addition to adding existing reports/views, you can also add New Content like Text fields, Images etc. to your Dashboard. To add new elements, drag and drop the element from ‘New Content’ section and drop it on the design section
- This elements can be well utilized to set Dashboard names and company logos
- Once the dashboard design is defined click on **Save**, the dashboard can then be tested by using the toggle button.
- To edit an existing dashboard, open the dashboard in ‘Designer View’ by right clicking on the dashboard name and selecting ‘Open in Designer’.



regoUniversity 2019 SAN DIEGO

# Exercise 7: Creating a Dashboard

# Scheduling a Report

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

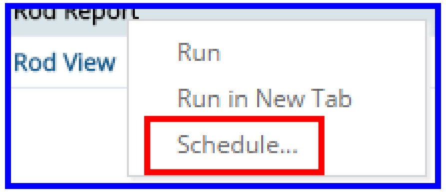
regoUniversity 2019
SAN DIEGO

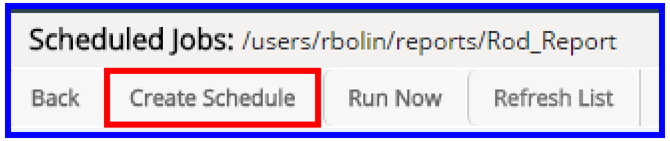
Let Rego be your guide.

# 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.**

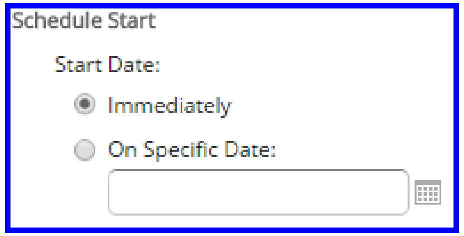


# Scheduling a Report – Schedule Tab

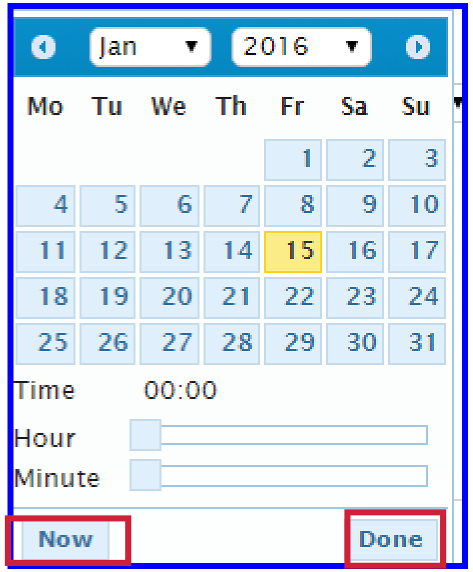
The Schedule window displays four tabs:


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.**

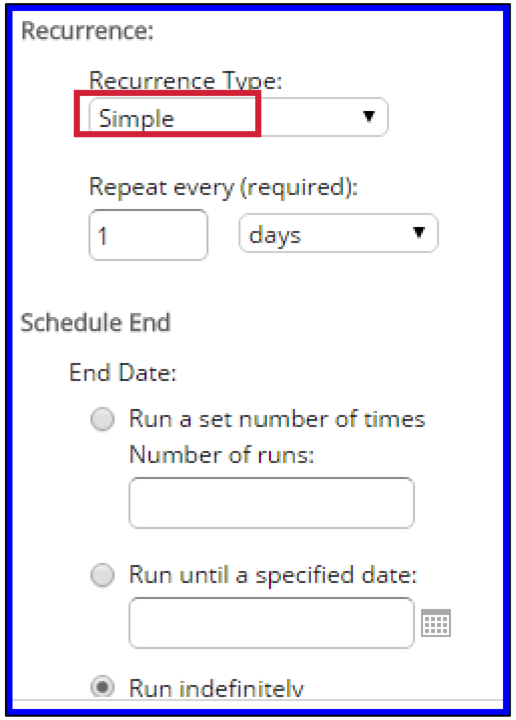


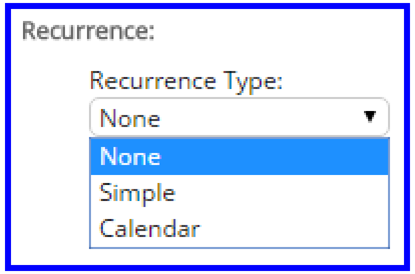

**Note:** The *Now button* is accessed via the Calendar icon.

# Scheduling a Report – Schedule Tab (2)

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

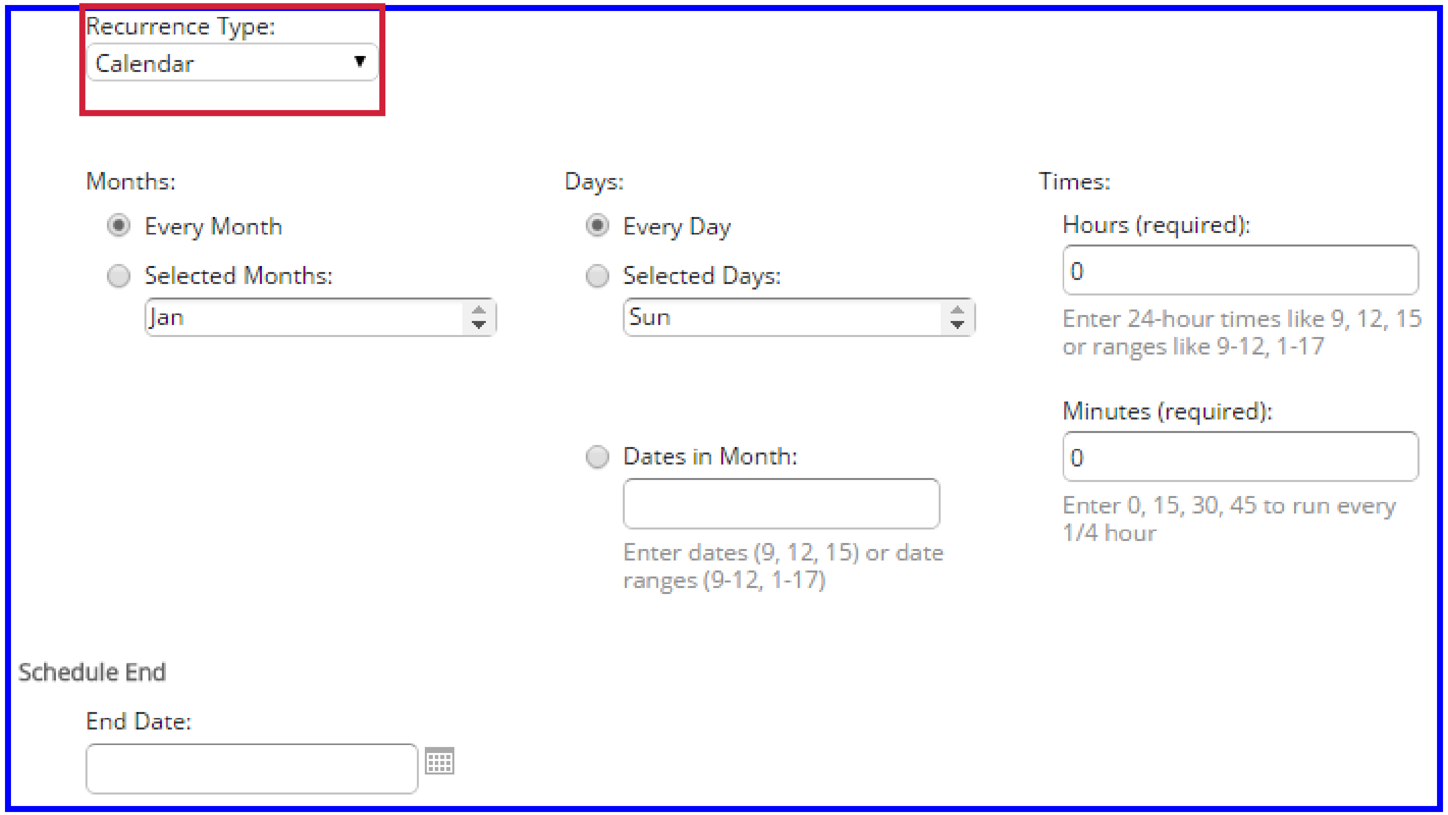
- Set **Recurrence Type** to **Simple.**
- *Define the repeat cycle* by selecting number of minutes, hours, days or weeks.
- Select the **Schedule End** by selecting: Run a set number of times, Run until a specified date, or Run indefinitely.



# Schedule A Report – Schedule Tab (3)

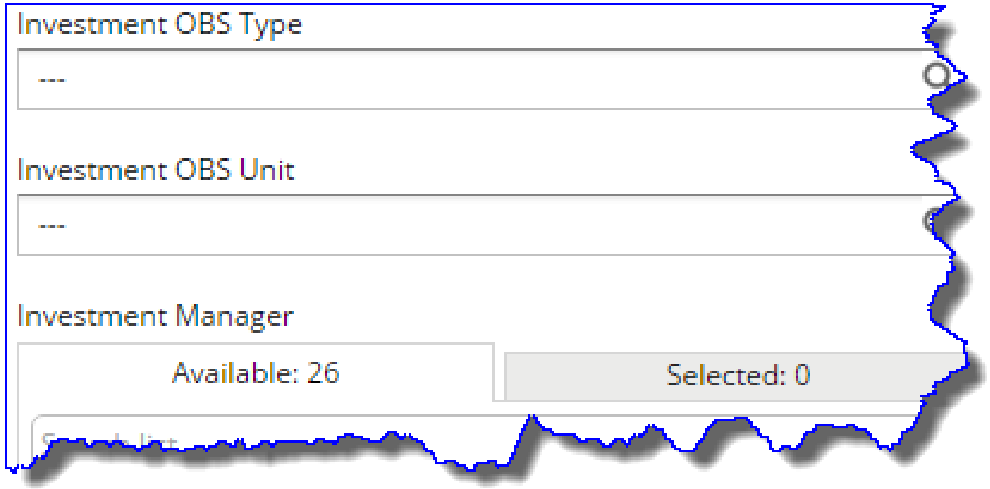
For a more detailed set of recurring values select *Calendar from the Recurrence Type drop-down.*



# 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.

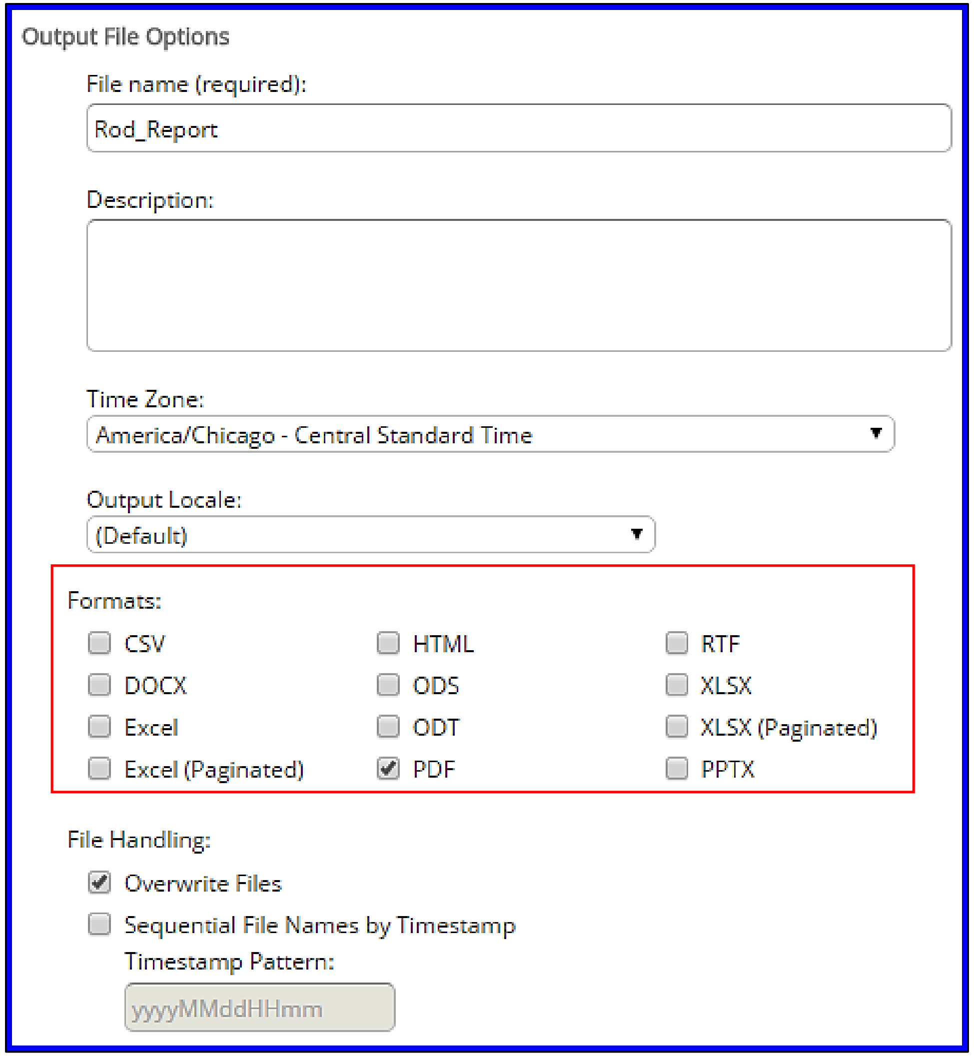
- Parameters will vary by report but could include:
    - Investment OBS Type
    - Investment OBS Unit
    - Investment Manager
    - Investment name
    - Investment Status
    - Investment Type
    - Fiscal Year



# Scheduling a Report – Option Output Tab

There are many different report format options.

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

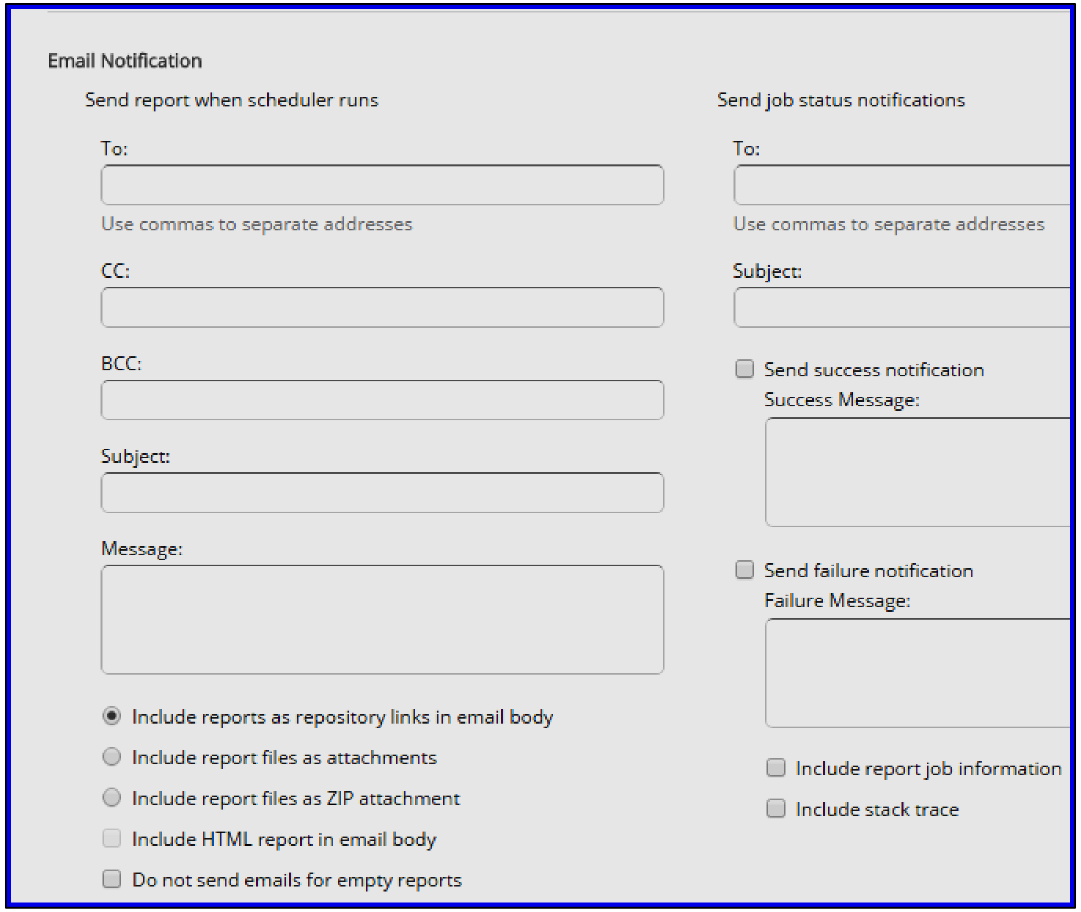


# Scheduling a Report – Notifications Tab

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.



regoUniversity 2019 SAN DIEGO

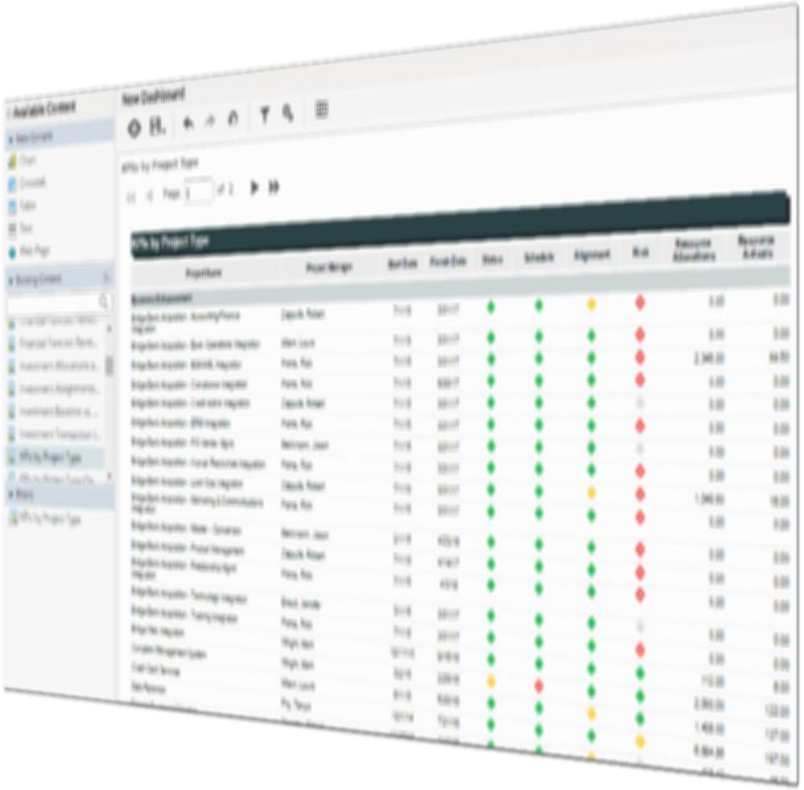
# Exercise 8: Scheduling a Report

regoUniversity 2019 SAN DIEGO

# Exercise 9: Create Your Own

# 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



# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

**Phone**
888.813.0444

**Email**
info@regouniversity.com

**Website**
www.regouniversity.com

# Appendix

- Differences Between CA PPM 14.2 and 15.3
- Jaspersoft Technical Overview
- Configuring Custom Attributes
- Jaspersoft Jobs
- Jaspersoft Security Administration
- Jaspersoft Users and Roles
- Create a custom Domain

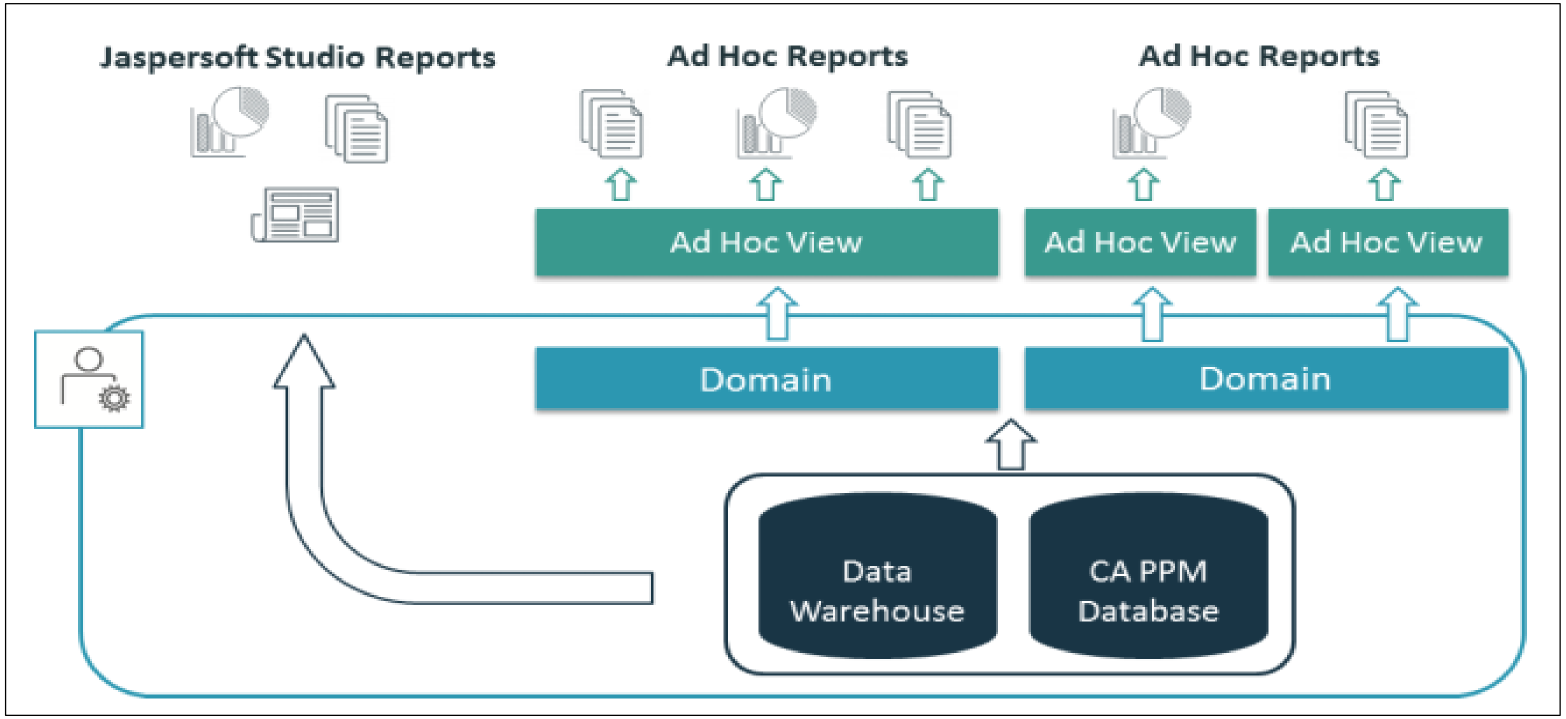
# Differences Between CA PPM 14.2 and 15.3

Changes were made to Advanced Reporting in CA PPM 15.3.

- 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.

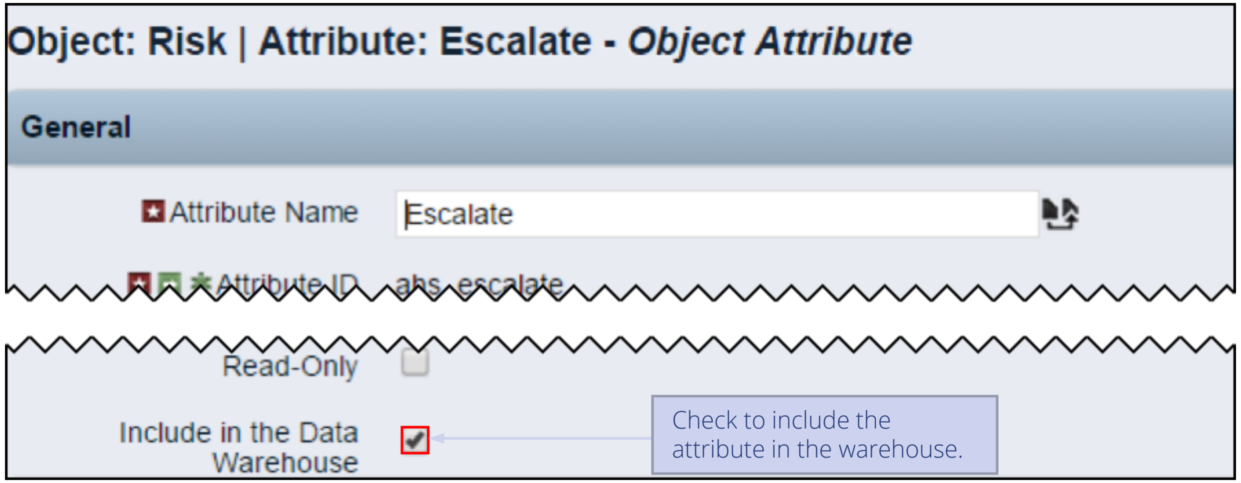
# Jaspersoft Technical Overview

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.

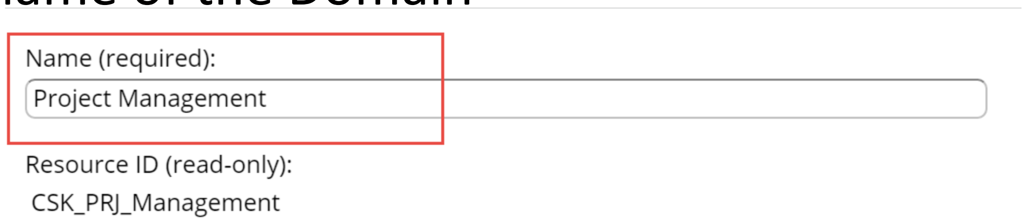
# Jaspersoft Users and Roles

- 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

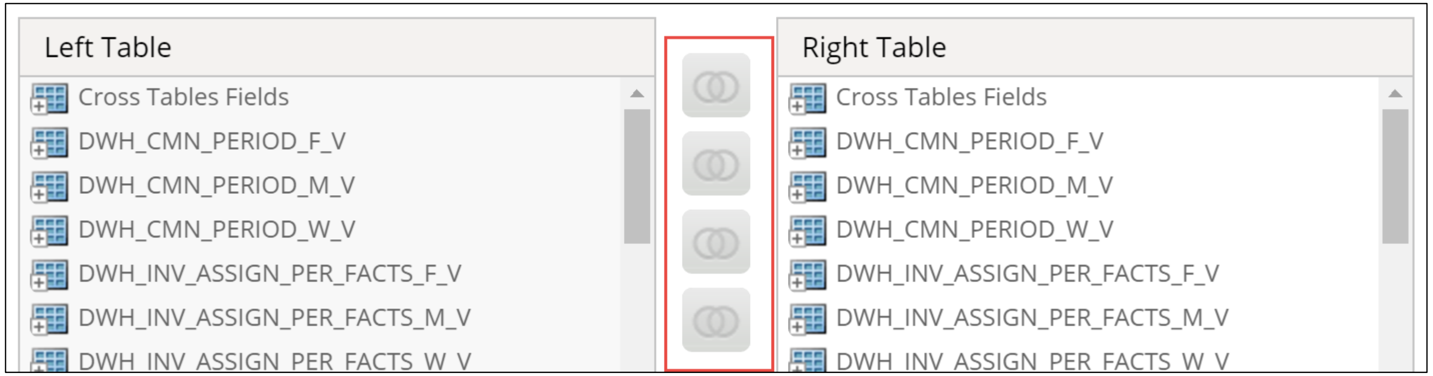
# Create a Custom Domain Cont.

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

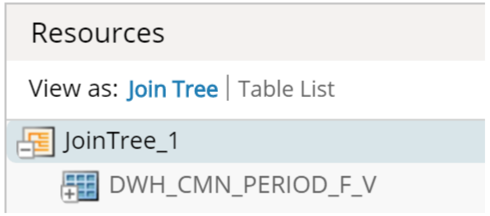
   Note: For information on what tables contain click [link]

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



# Create a Custom Domain Cont.

7. Click the Display Tab
8. Expand the jointree table in the Resources list on the far left side




9. 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.

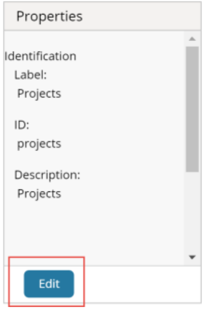
 - Adds the field to the selected set.

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

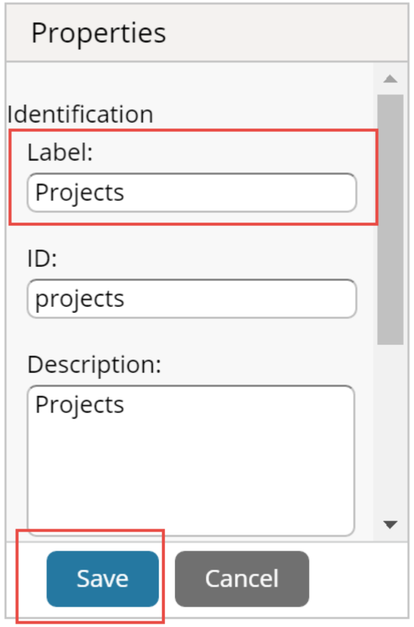
To add new subsets click “New Set” button once you have selected a parent set in the Sets and Items list.

# Create a Custom Domain Cont.

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




11. Edit the label name to an appropriate label
12. Click Save
13. Click Ok once you have added all attributes
14. Click Submit to finish editing the domain



# Questions?

regoUniversity 2019

SAN DIEGO

# Thank You For Attending regoUniversity

## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Name = **regoUniversity**
- Course Number = **Session Number**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

**Phone**
888.813.0444

**Email**
info@regouniversity.com

**Website**
www.regouniversity.com