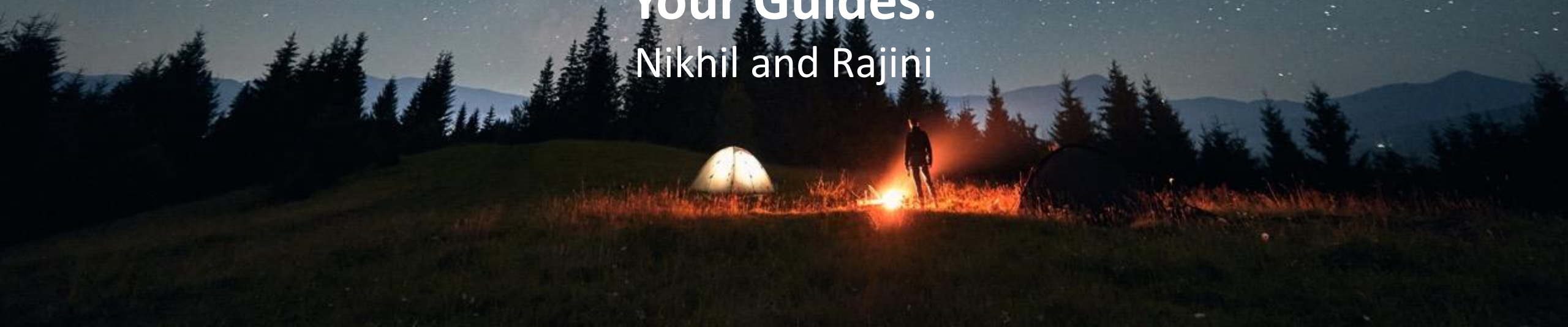




# Jaspersoft Ad Hoc | Beginner

**Your Guides:**  
Nikhil and Rajini



# Course Outline

- Overview
  - What is Jaspersoft
  - How does Jaspersoft Work
- 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

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**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





# What is Jaspersoft?

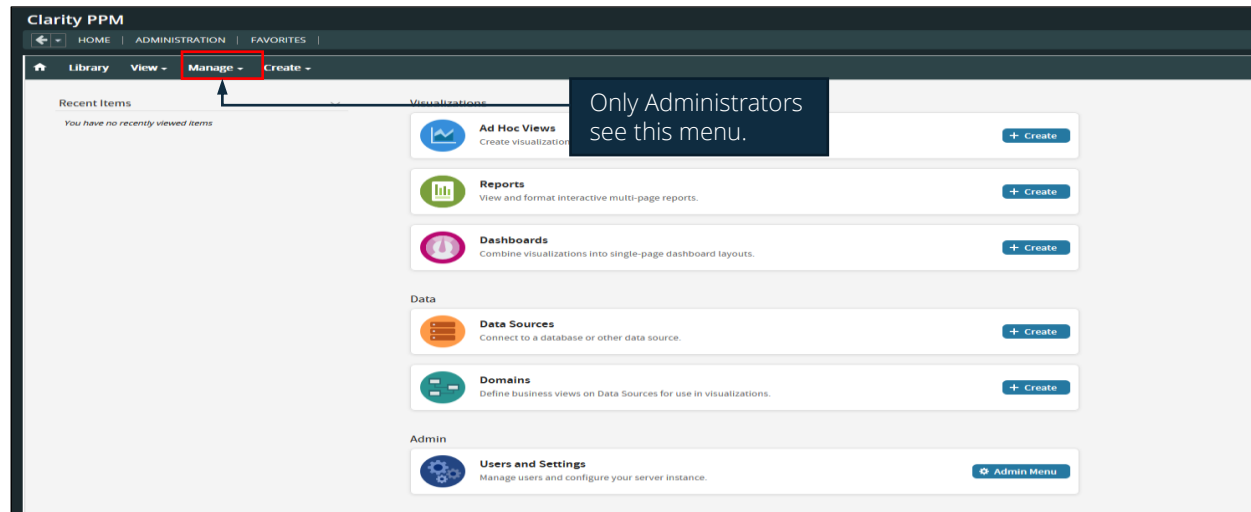
- Jaspersoft is a reporting software that takes information from CA PPM to provide easy to read, highly interactive reports for users.
- Jaspersoft is a rights based reporting system. The capabilities of the Advanced Reporting in CA PPM is dependent on what security users are granted.
- Jaspersoft reporting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

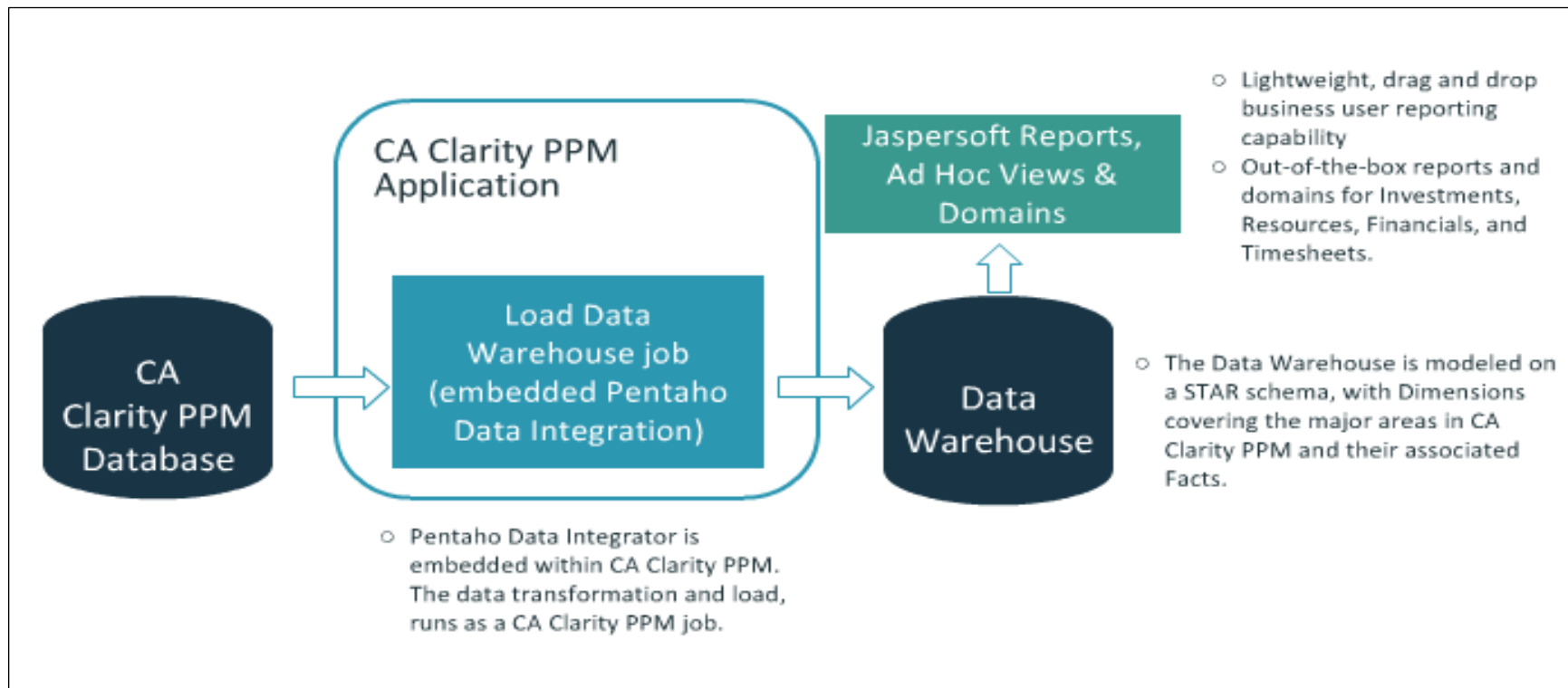
The rights above will show them the following when accessing advanced reporting.



# Data Warehouse Overview

7

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.

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

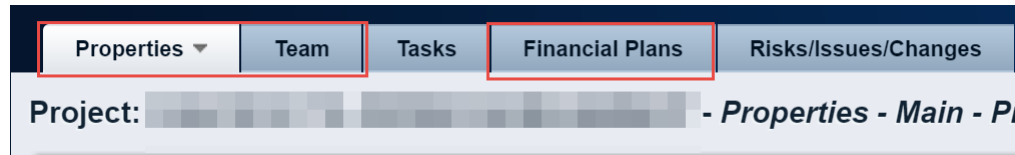


# Investment Management Domain

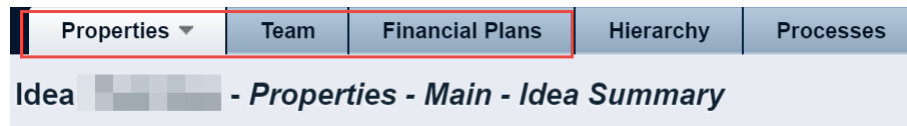
The investment management domain will only show data that is shared between the idea and project. If an attribute gets carried over when converting from idea to project, that attribute will be in this domain.

The following tabs will be available in the Investment Management domain

Project:



Idea:

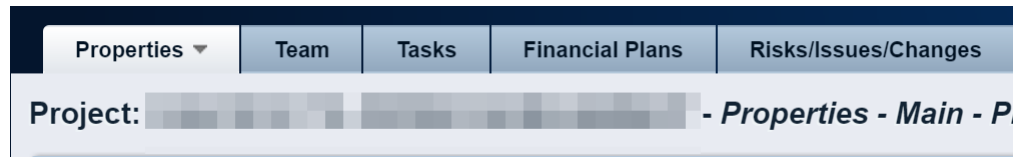


# Project Management Domain

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:

Project: [redacted] - Tasks - Task List

Open in Scheduler Scenario: [--Select--] Actions

Filter: None

Task	Task ID	Start	Finish	Baseline Finish	Is Late	Status	% Complete	Critical	Open for Time Entry	Actuals	Created By
[redacted]	~rmw	3/21/13	3/21/13			Not Started	0%			0.00	Administrator, Clarity

Displaying 1 - 1 of 1

Assignment:

Assignments																		
		Resource	Role	Loading Pattern	Start	Finish	Actuals	Actual Cost (ACWP)	ETC	EAC	ETC By Period							Pending Actual
											3/28/16	4/4/16	4/11/16	4/18/16	4/25/16	5/2/16	5/9/16	
				Front	3/21/13	3/21/13	0.00		0.00	0.00								

# Idea Management Domain

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

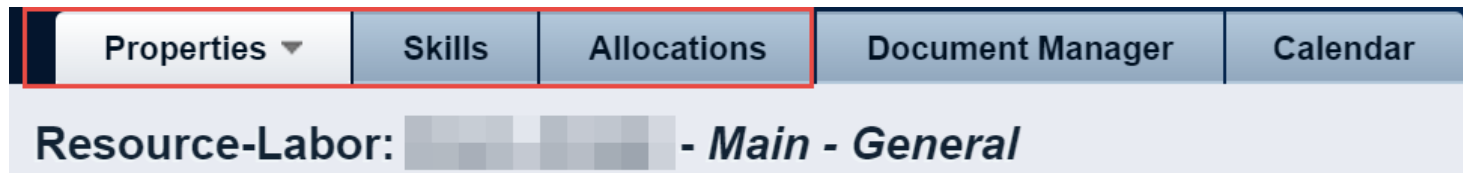
The following data in CA PPM is available in the idea management domain



# 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: [Redacted] Submitted by: [Redacted]

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	[Redacted]	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

[Approve] [Return Timesheet] [Cancel]

Work Effort = Hours

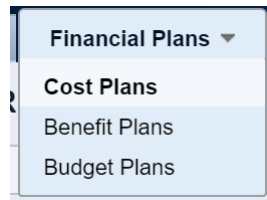
[Configure]  
[Printable Version]

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



Properties

Detail

Processes

Project:

Cost Plan: Budget Plan - Cost Plan Details

Actions

Show:

Investment Currency View

Filter: None

							Amounts By Period							
	Cost Type	Charge Code	Planned Cost	Actual Cost	Cost Variance		2016	2017	2018	2019				
	Capital	Capital	1,800,000.00	172,627.17	1,627,372.83	Planned Cost	1,800,000	0	0	0				
						Actual Cost	172,627	0	0	0				
						Cost Variance	1,627,373	0	0	0				
Cost							1,800,000	0	0	0				
Actual Cost				172,627.17			172,627	0	0	0				
Cost Variance					1,627,372.83		1,627,373	0	0	0				

Save

Add

Delete

Return

Currency = USD

Displaying 1 - 1 of 1



# Accessing Advanced Reporting

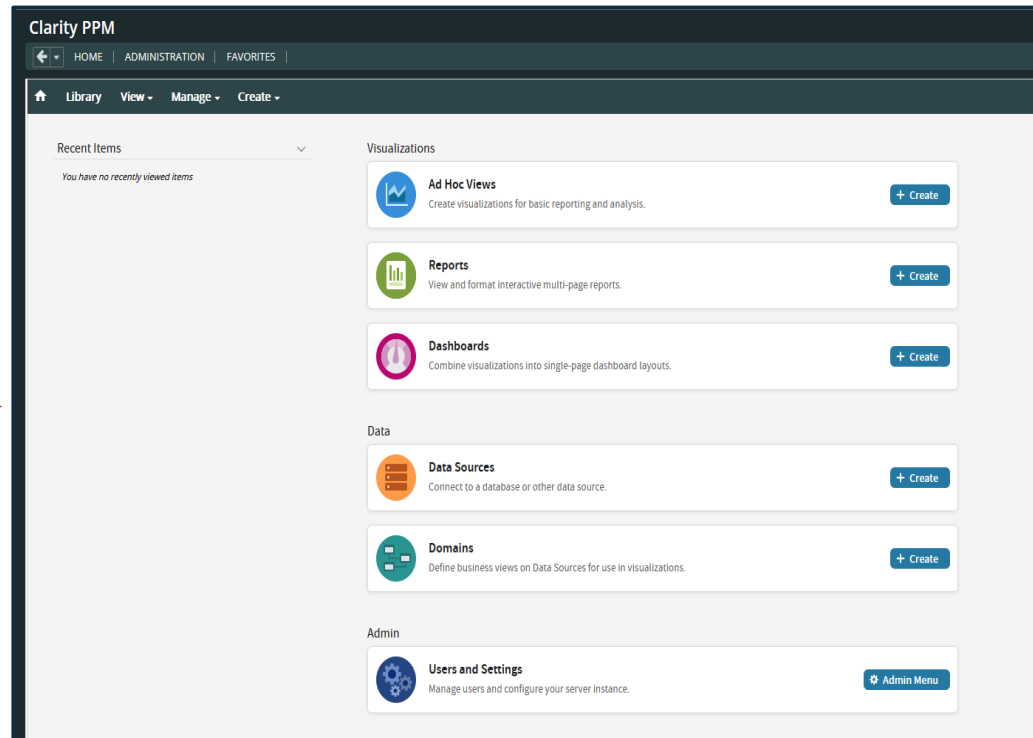
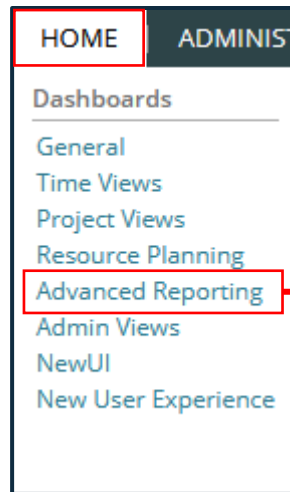
- Advanced Reporting Navigation



Let Rego be your guide.

# 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**




<u>Right</u>	<u>Description</u>	<u>Notes</u>
<b>Advanced Reporting: Ad Hoc Create</b>	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. <b>Note:</b> Domain access is required to enable create rights.
<b>Advanced Reporting: Administer</b>	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.
<b>Advanced Reporting: Dashboard Create</b>	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.
<b>Advanced Reporting: Data Source Create</b>	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)

<u>Right</u>	<u>Description</u>	<u>Notes</u>
<b>Advanced Reporting: Domain Create</b>	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.
<b>Advanced Reporting: Navigate</b>	Allows resource to navigate to the Advanced Reporting page. Resource is assigned JasperSoft role as ROLE_USER.	By default all users inherit this right , <b>but</b> CA PPM navigation rights are also required.
<b>Advanced Reporting: Report Create</b>	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

	<u>Library</u>	<u>View</u>	<u>Manage</u>	<u>Create</u>
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
		• Schedule	• Roles	• Dashboard
		• Messages	• Update Domain Schema	• Domain
				• Data Source

# Library Menu

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

Library View Manage Create					
Library					
<input type="text"/>					
Sort By: Name Modified					
Name	Description	Type	Created Date	Modified Date	
Capacity vs. Allocation by OBS	Resource Management (PMO Accelerator)	Report	August 15	August 15	
Capacity vs. Booking Status by OBS	Resource Management (PMO Accelerator)	Report	August 15	August 15	
Capacity vs. Demand by Resource	Resource Management (PMO Accelerator)	Report	August 15	August 15	
Capacity vs. Demand by Role	Resource Management (PMO Accelerator)	Report	August 15	August 15	
Customizations Overview	Administration (PMO Accelerator)	Report	August 15	August 15	
Data Warehouse Schema	Administration (PMO Accelerator)	Report	August 15	August 15	
Database Connection Check: CA PPM	Administration (PMO Accelerator)	Report	August 15	August 15	
Database Connection Check: Data Warehouse	Administration (PMO Accelerator)	Report	August 15	August 15	
Financial Budget vs. Forecast by Period	Financial Management (PMO Accelerator)	Report	August 15	August 15	
Financial Budget vs. Forecast by Period Detail	Financial Management (PMO Accelerator)	Report	August 15	August 15	
Financial Capitalization Detail	Financial Management (PMO Accelerator)	Report	August 15	August 15	
Financial Capitalization by Investment	Financial Management (PMO Accelerator)	Report	August 15	August 15	
Financial Forecast Review by Investment	Financial Management (PMO Accelerator)	Report	August 15	August 15	
Financial Forecast Review by Plan Grouping	Financial Management (PMO Accelerator)	Report	August 15	August 15	
Investment Allocations and Assignments	Investment Management (PMO Accelerator)	Report	August 15	August 15	
Investment Assignments by Task	Investment Management (PMO Accelerator)	Report	August 15	August 15	
Investment Baseline vs. Plan by Task	Investment Management (PMO Accelerator)	Report	August 15	August 15	
Investment Change Request Register	Investment Management (PMO Accelerator)	Report	August 15	August 15	
Investment Issue Register	Investment Management (PMO Accelerator)	Report	August 15	August 15	



# 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 list 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.

# Manage Menu

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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

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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.



The screenshot shows a web interface titled 'Home'. Below the title is a section labeled 'Recently Viewed Items' with a dropdown arrow. It contains a list of items with their names and types. The items are: 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), and Financial Capitalization Detail (Report). The bottom of the screenshot is torn.

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



Domains

## Functional Users



Reports



Ad Hoc Views



Dashboards



# Exercise 1: Navigation

Let Rego be your guide.

# Running a Report

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



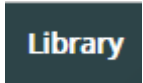
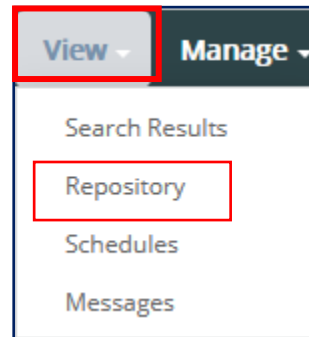
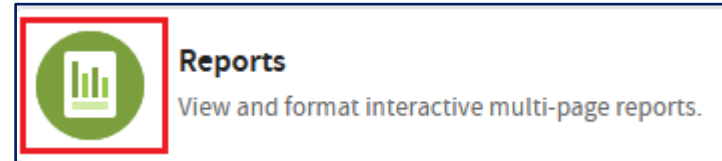
Let Rego be your guide.



# Accessing Reports

Reports can be accessed three ways:

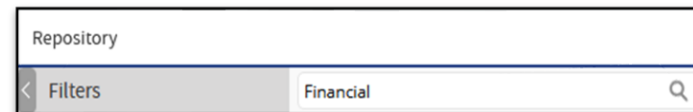
- **Advanced Reporting Menu > Library**
- **Advanced Reporting Home Page > Reports Icon**
- Click **View > Repository**

A dark blue rectangular button with the word "Library" in white text.

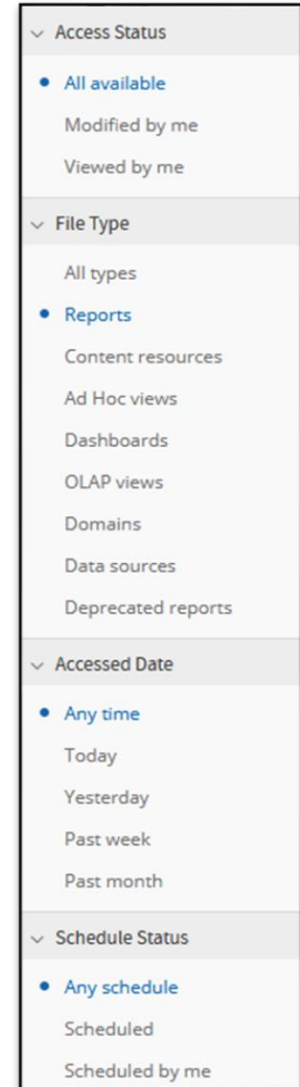
# Report Section

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).



The screenshot shows a search bar labeled "Repository" with a search icon. Below it is a filter dropdown menu with a left arrow, the word "Filters", and a search icon. The dropdown is currently open, showing the word "Financial" as the selected filter.




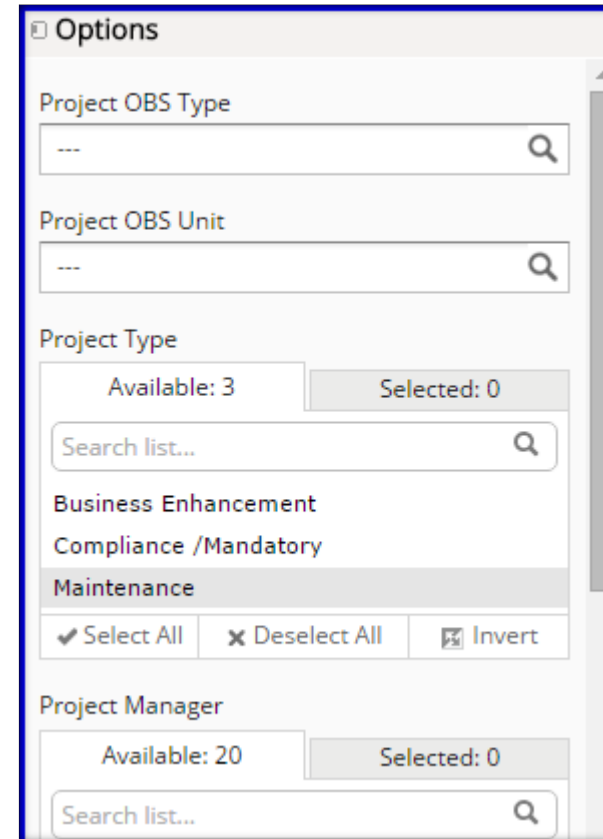
The screenshot shows a sidebar with four filter categories, each with a dropdown arrow and a list of options:

- Access Status**
  - All available
  - Modified by me
  - Viewed by me
- File Type**
  - All types
  - Reports
  - Content resources
  - Ad Hoc views
  - Dashboards
  - OLAP views
  - Domains
  - Data sources
  - Deprecated reports
- Accessed Date**
  - Any time
  - Today
  - Yesterday
  - Past week
  - Past month
- Schedule Status**
  - Any schedule
  - Scheduled
  - Scheduled by me

# 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.



**Options**


Project OBS Type  
---

Project OBS Unit  
---

Project Type  
Available: 3 Selected: 0  
Search list...  
Business Enhancement  
Compliance /Mandatory  
Maintenance  
✓ Select All ✗ Deselect All 

Project Manager  
Available: 20 Selected: 0  
Search list...

# Report Menu Structure


 **Navigates** to the previous screen.

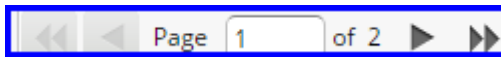
 **Save** the report if changes were made.

 **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

Let Rego be your guide.

# Overview of an Ad-Hoc Report

✓ Accessing and Creating an Ad-Hoc Report



Let Rego be your guide.



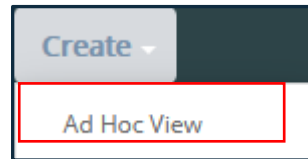
# Ad-Hoc Views

- 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.

Source

▼ Projects

Project Name

Project ID

Description

Project Manager

Start Date

Finish Date

► Custom

▼ General

Status

Progress

Stage

Stage Number

Stage Count

Sponsored By

Target Manager

As of Date

Source

► Portfolio

► Program

► Team

► Tasks

► Financial

▼ Summary Totals

► Project

► Team

► Task

▼ Assignment

▼ Total Hours

Assignment Total Actual Hours

Assignment Total Baseline Hours

Assignment Total EAC Hours

Assignment Total ETC Hours

Assignment Total Pending Actual Hours

Assignment Total Pending EAC Hours

# Selecting a Domain

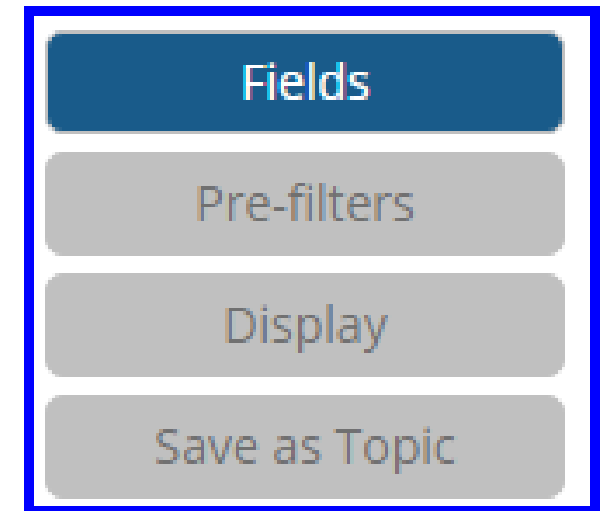
In order to create an Ad-Hoc report the user must select **ONE** domain.

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

# Choose Data - Window

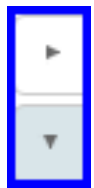
The Ad-Hoc choose data screen will display three main sections.

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



# Choose Data - Fields

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

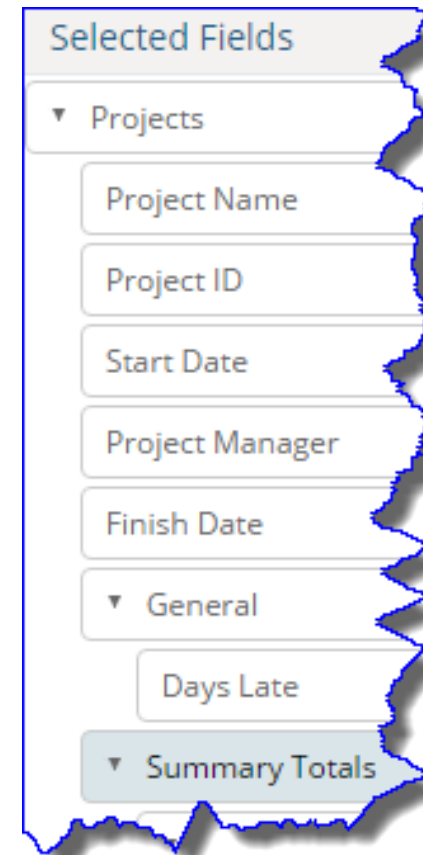


Clicking on the arrows to the left of a listed Items will expand or collapse the hierarchy of components.



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

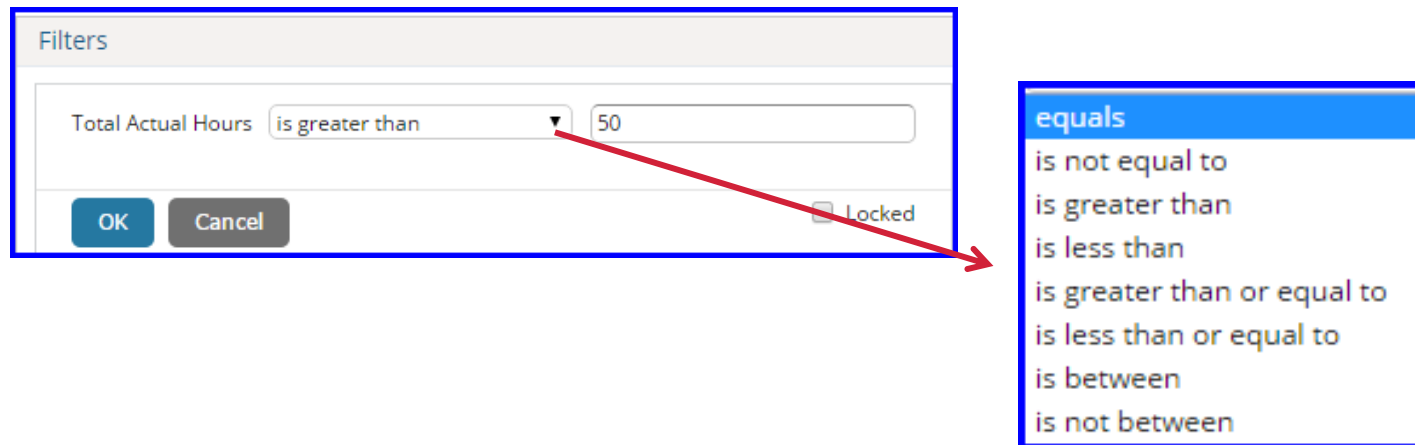
Any unwanted items can be removed using the arrows.





# Pre-Filters

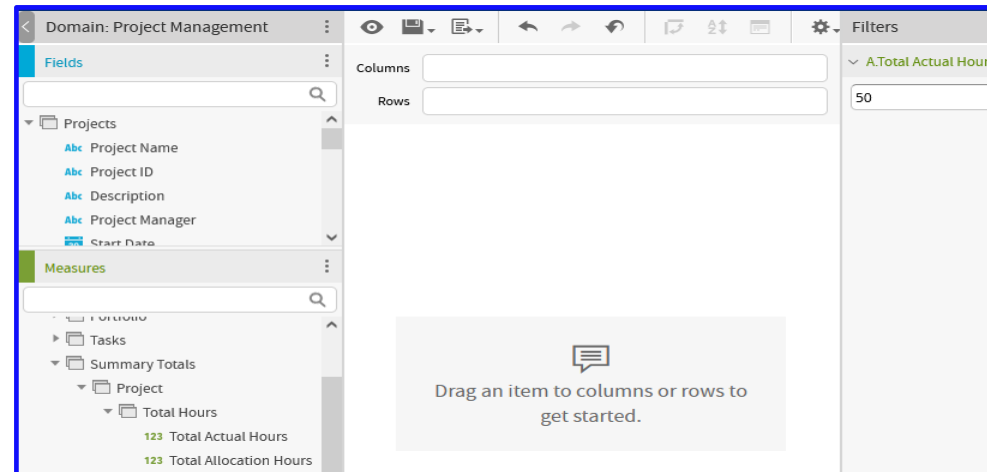
- **Pre-filters** allow the user to select filtering criteria to populate the report with specific types of data.
- **Select the data field(s)** for the filter and use the drop-down to select the criteria. Then **populate the data field**.
  - **Note:** Options may vary based on item(s) selected.
- Once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



# Layout of the View

The Layout page displays five sections:

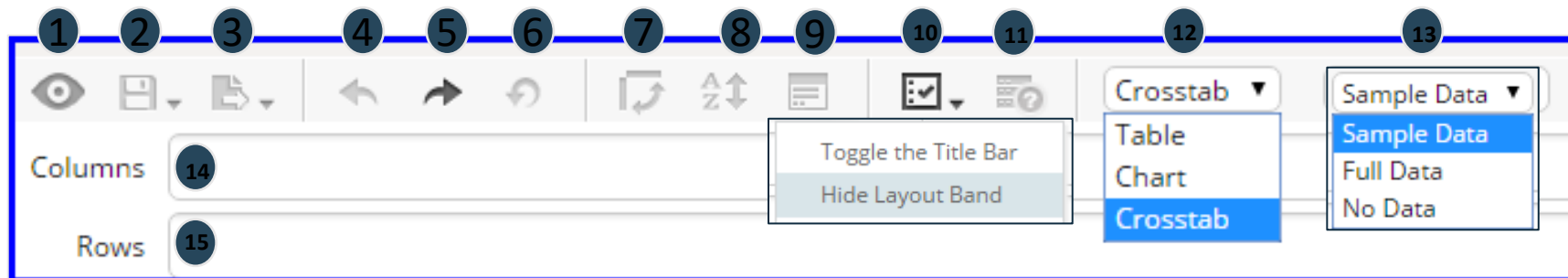
- Fields (components) that were selected from the domain.
- Measures which are fields (components) that contain calculated fields.
- New Ad-Hoc View screen where the layout of the view is created.
- Filter section that display the pre-defined filters and where other filters can be added.
- Custom Filter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



# Layout of the View (2)

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

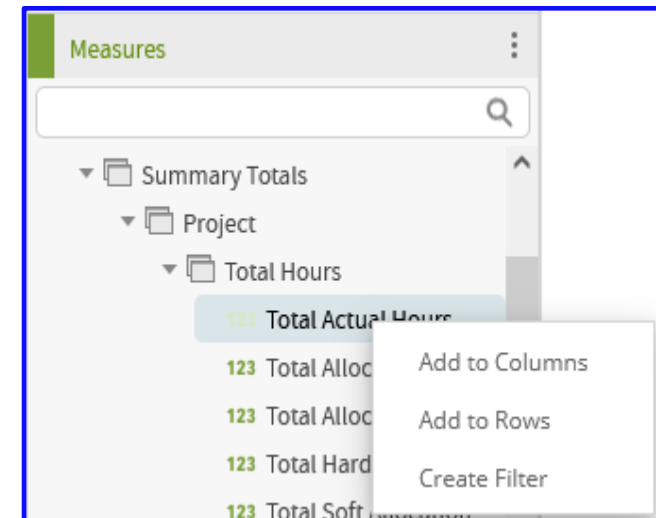
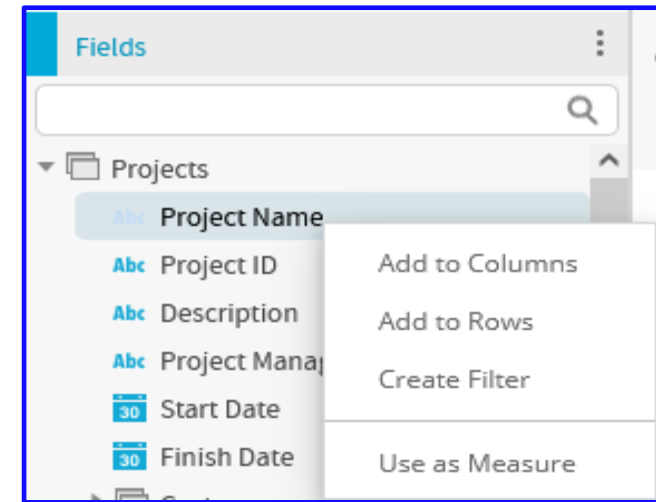
1. Toggle between design and display modes
2. Save
3. Save As
4. Undo the Last Change
5. Redo the Last Change
6. Reset the report to the last saved state
7. Switch the Groups
8. Set the Sort Order
9. Change the Input Values
10. Toggle Title Bar / Hide Layout Band
11. View SQL Query
12. Type of View
13.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



# Layout of the View (3)

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

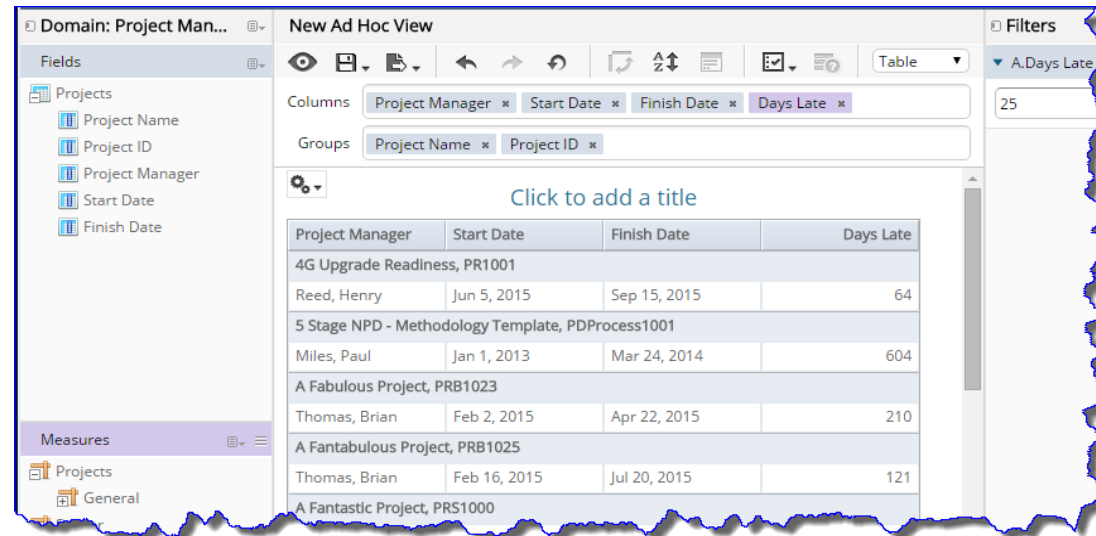
- Right-clicking on a component in the **Fields** section will provide options to Add to Columns, Add to Rows, Create Filter or Use as Measure on the view.
- Right-clicking on a component in the **Measures** section provides the options to Add as a Column, Create Filter, Use for Sorting or Use as Field.



# Layout of the View (4)

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

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



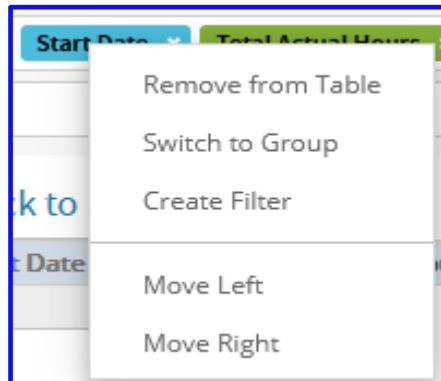
The screenshot shows the 'New Ad Hoc View' interface. On the left, there is a 'Fields' pane with 'Projects' and 'Measures' sections. The 'Columns' field contains 'Project Manager', 'Start Date', 'Finish Date', and 'Days Late'. The 'Groups' field contains 'Project Name' and 'Project ID'. The 'Filters' pane on the right shows 'A.Days Late' with a value of 25. The main area displays a table with the following data:

Project Manager	Start Date	Finish Date	Days Late
4G Upgrade Readiness, PR1001			
Reed, Henry	Jun 5, 2015	Sep 15, 2015	64
5 Stage NPD - Methodology Template, PDProcess1001			
Miles, Paul	Jan 1, 2013	Mar 24, 2014	604
A Fabulous Project, PRB1023			
Thomas, Brian	Feb 2, 2015	Apr 22, 2015	210
A Fantabulous Project, PRB1025			
Thomas, Brian	Feb 16, 2015	Jul 20, 2015	121
A Fantastic Project, PRS1000			

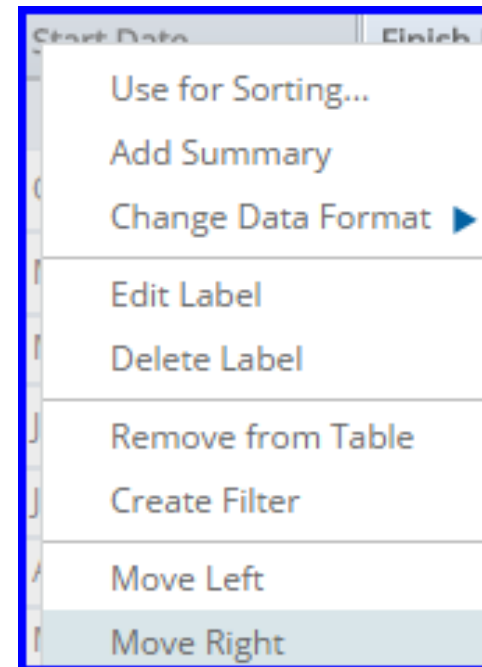
# Layout of the View (5)

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

## Column/Group



## Data



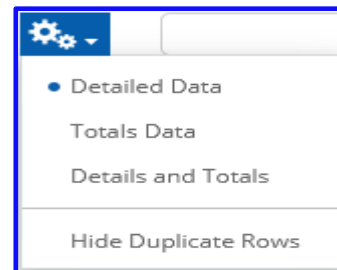
# Layout of the View (6)

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

[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.

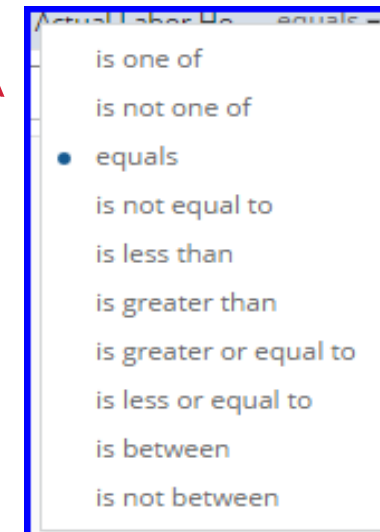
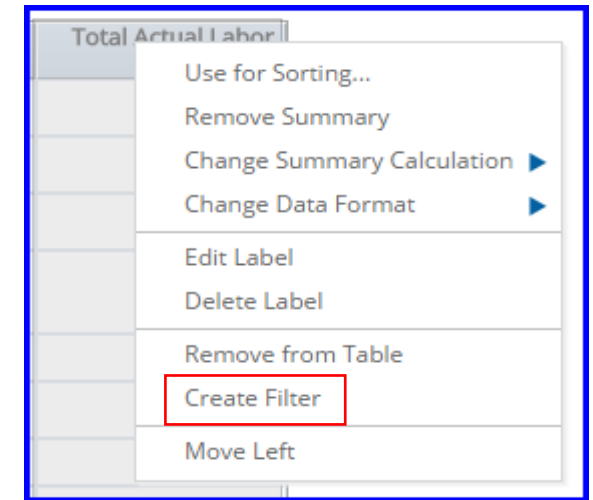


	test	2015-00347	Oct 23, 2015	Jan 6, 2017	0	0
	IT Vendor	2016-00102	Jan 11, 2016	Dec 31, 2016	0	0.00
	test	2015-00244	Mar 9, 2015	May 22, 2015	197	0
Totals	15	15	15	15	2936	391



# 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

Let Rego be your guide.

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

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



Let Rego be your guide.

# 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.

Save Ad Hoc View and Create Report

Data View Name (required):  
Ad Hoc View

Report Name (required):  
Ad Hoc View Report

Data View Description:

Report Description:

Folder selection trees:

- Left tree: rego > CA PPM > CA PPM Reports Output > Shared > Users (selected)
- Right tree: rego > CA PPM > CA PPM Reports Output > Shared > Users > Rego (selected)

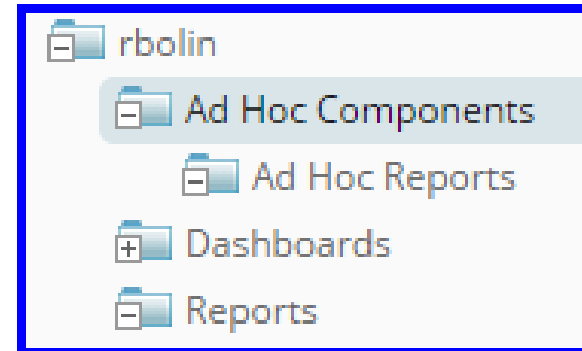
Save was successful | close



# Accessing a Saved Report

Accessing a saved view/report can be accessed via:

- Library:
  - Enter search criteria.
  - Click on the view/report.
- Repository
  - Locate and expand the User folder
  - Click on Ad Hoc Reports or Reports
  - Click on the View or Report that populates to the rights of the folders section.



# Exercise 4: Creating a Report

Let Rego be your guide.

# Creating a Cross Tab View

- Creating a Cross Tabbed Report



Let Rego be your guide.



# 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						
+	IT - Support Services - Network Services	Totals		76.50		76.50	
+	IT - Support Services - Help Desk	Totals	237.25	237.25	237.25		
+	IT - Support Services - IT Help Desk	Totals		24.00	24.00		
+	IT - Support Services - IT Help Desk	Totals			46.00		
+	IT - Support Services - IT Help Desk	Totals	99.50	99.50	99.50		99.50
+	IT - Support Services - IT Help Desk	Totals	16.00		16.00		
+	IT - Support Services - IT Help Desk	Totals		133.50	133.50		
+	IT - Support Services - IT Help Desk	Totals		2,777.52		2,777.52	
Totals	Totals		352.75	3,348.27	556.25	2,854.02	99.50

# Exercise 5: Creating a Cross Tab Report

Let Rego be your guide.

# Creating a Chart

- Creating a Chart

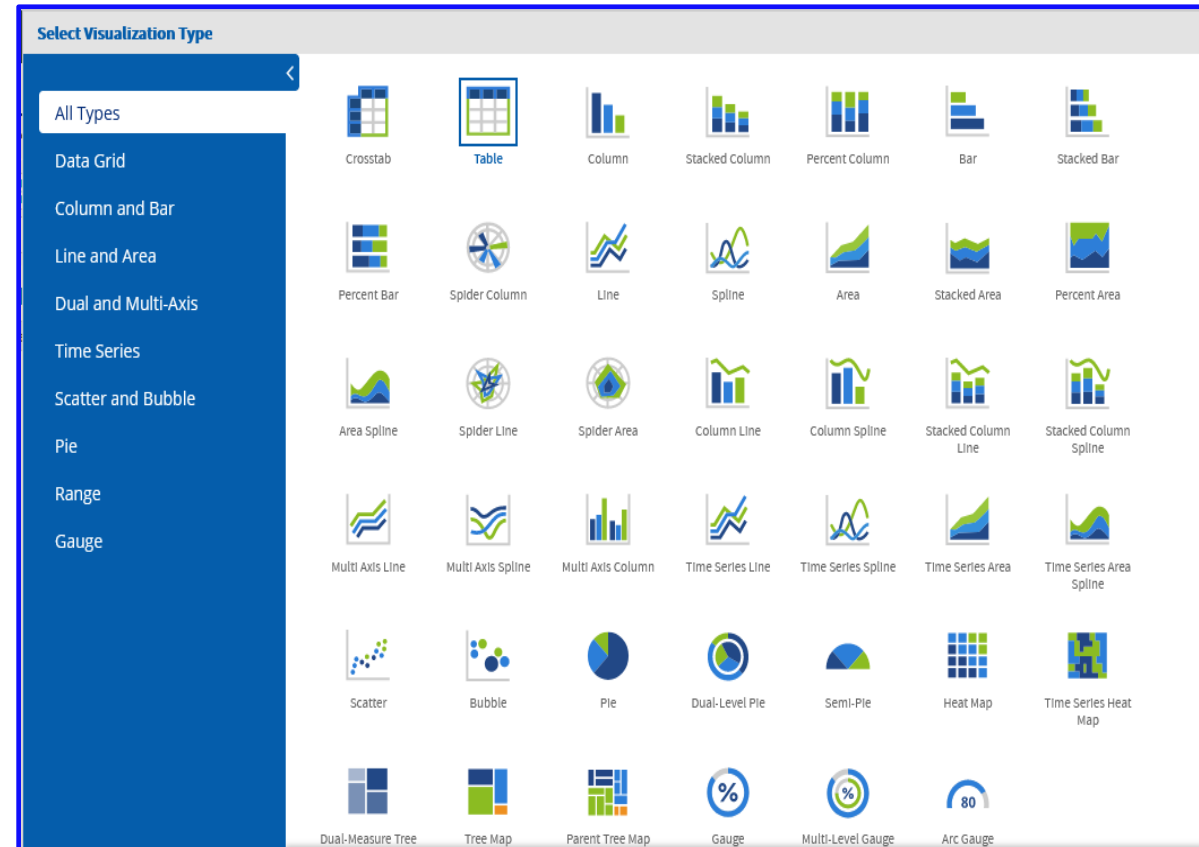


Let Rego be your guide.


# Creating Charts

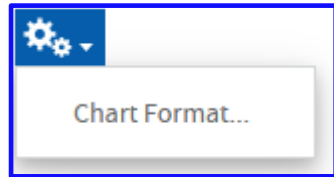
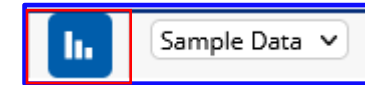
Charts are a flexible way to see data graphically.

- 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 Visualization Type** icon.
- Select the chart type and click Apply and Close.
- **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

Appearance

The 'Axis' tab is selected. It contains settings for the X and Y axes. For the X Axis, the 'Interval between X-axis labels' is set to 1 and the 'Rotation of X-axis labels' is set to -45. For the Y Axis, the 'Interval between Y-axis labels' is set to 1 and the 'Rotation of Y-axis labels' is set to 0.

The 'Label' tab is selected. It contains settings for the legend, measures, and general formatting. Under 'Legend', the 'Legend position' is set to 'Bottom' and 'Show legend border' is checked. Under 'Measures', 'Show measure name when only one measure is present' and 'Show measure name on value axis' are both checked. Under 'General', 'Auto-scale label font size' is checked.

The 'Appearance' tab is selected. It contains settings for series colors, background colors, line and area, scatter and bubble, and gauges. Under 'Series Colors', there is a '+ Add Series Color' button. Under 'Background Colors', the 'Chart' color is set to #FFFFFF and the 'Plot' color is set to TRANSP. Under 'Line and Area', 'Show data points on line charts' is checked. Under 'Scatter and Bubble', 'Show line on scatter charts' is unchecked. Under 'Gauges', the 'Layout' is set to 'Best Fit', the 'Min Value' is 0, and the 'Max Value' is 100.

# Exercise 6: Creating a Chart

Let Rego be your guide.

# Creating a Dashboard

- Creating a Dashboard Report



Let Rego be your guide.



# Dashboards

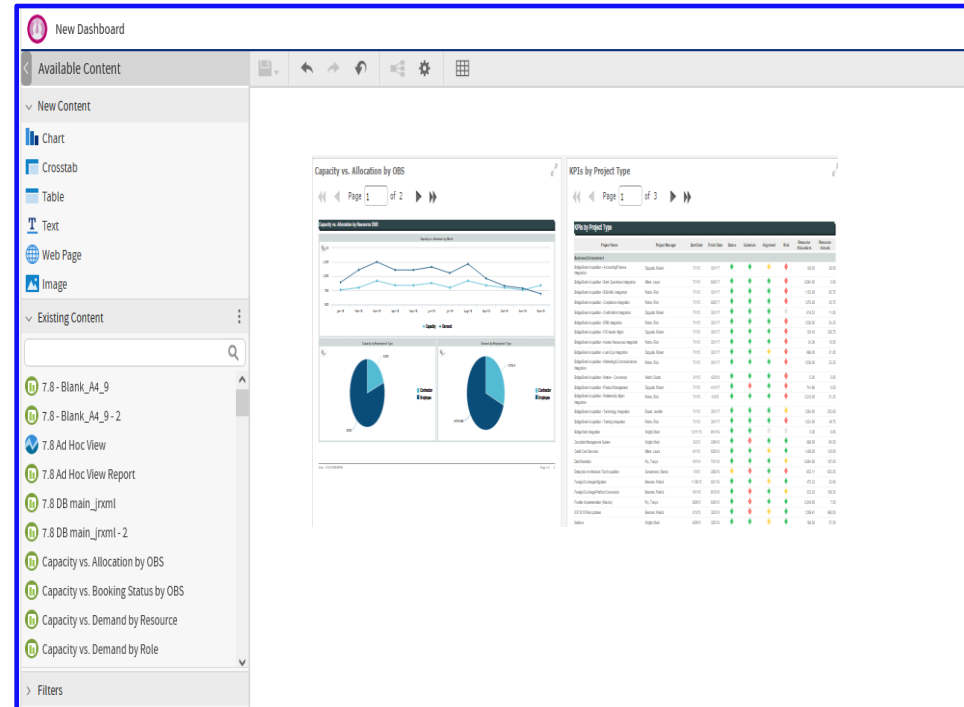
---

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


# Creating a Dashboard Report

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

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



# 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.

**Parameter Mapping**

Source Dashlet	Filter/Parameter	Dashlet Affected	Filter/Parameter Affected	
Filter Group	OBS Path	Ad Hoc View	OBS Path	
		Chart	OBS Path	
	OBS Type 2	Ad Hoc View	OBS Type	
		Chart	OBS Type	

OK Cancel [Create New Filter](#)

- 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.

**New Dashboard**

OBS Type 2  
[Null]

OBS Path  
Available: 20

Search list...

[Null]  
Clients\_Consulting & Operational Infrastructure  
CMO | BAHN Health Home  
CMO | Behavioral Health Management (UBA)  
CMO | CLI  
CMO | Finance

Apply

Chart

Approved

**Dashboard Properties**

**Canvas Settings:**

Background Color:

☐ Set custom size in pixels: 1280 by 800

**Dashlet Settings:**

☐ Show Filter Dashlet as pop-up window

☒ Show borders

Outer margin in pixels:

Inner padding in pixels:

Title bar text color:

Title bar background color:

**Toolbar Settings:**

☐ Show Export button


**Refresh Settings:**

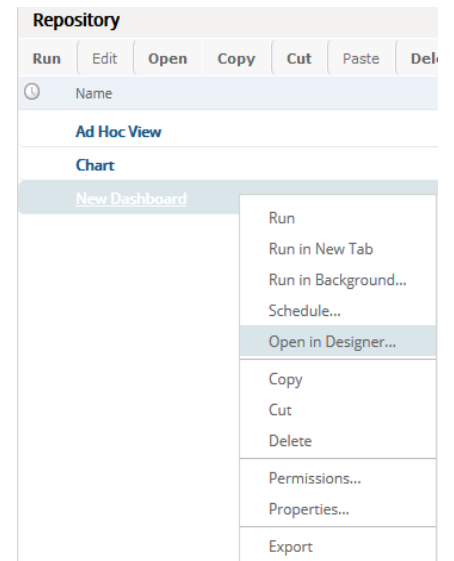
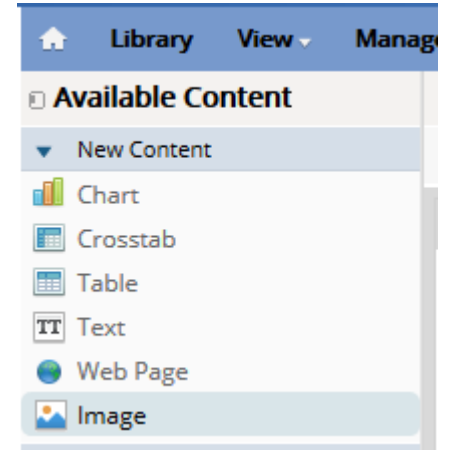
☐ Auto-refresh dashboard contents

Refresh Interval:  Minutes

Apply OK Cancel

# 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
- These 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'.





# Exercise 7: Creating a Dashboard

Let Rego be your guide.

# Scheduling a Report

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



Let Rego be your guide.

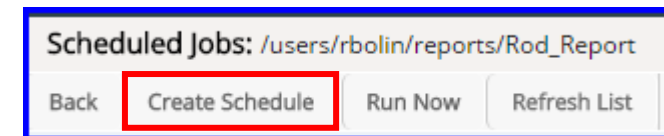
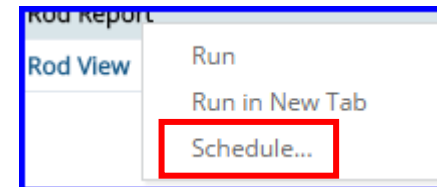
# Scheduling a Report

- 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:

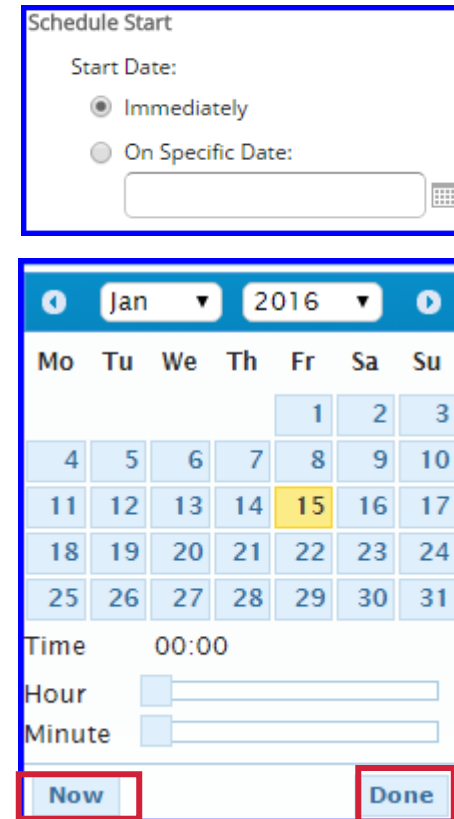


By default the Schedule tab displays to allow the user to define when the report is going to run.

## 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.

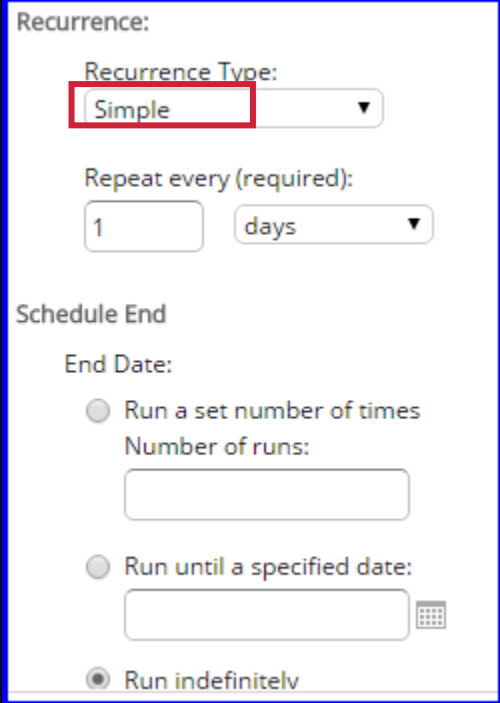
The 'Schedule Start' dialog box is shown. It has two radio buttons: 'Immediately' (selected) and 'On Specific Date:'. Below the 'On Specific Date' option is a text input field and a small calendar icon. Below this is a calendar interface for January 2016. The calendar shows days of the week (Mo to Su) and dates (1 to 31). The date '15' is highlighted in yellow. Below the calendar is a 'Time' section with '00:00' and input fields for 'Hour' and 'Minute'. At the bottom are two buttons: 'Now' (highlighted with a red box) and 'Done' (highlighted with a red box).



# 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.



Recurrence:

Recurrence Type: Simple

Repeat every (required): 1 days

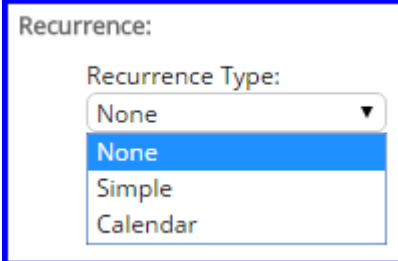
Schedule End

End Date:

☐ Run a set number of times  
Number of runs:

☐ Run until a specified date:

☒ Run indefinitely



Recurrence:

Recurrence Type:

- None
- None
- Simple
- Calendar

# Schedule A Report – Schedule Tab (3)

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

Recurrence Type:  
Calendar ▼

Months:  
☒ Every Month  
☐ Selected Months:  
Jan ▼

Days:  
☒ Every Day  
☐ Selected Days:  
Sun ▼  
☐ Dates in Month:  
Enter dates (9, 12, 15) or date ranges (9-12, 1-17)

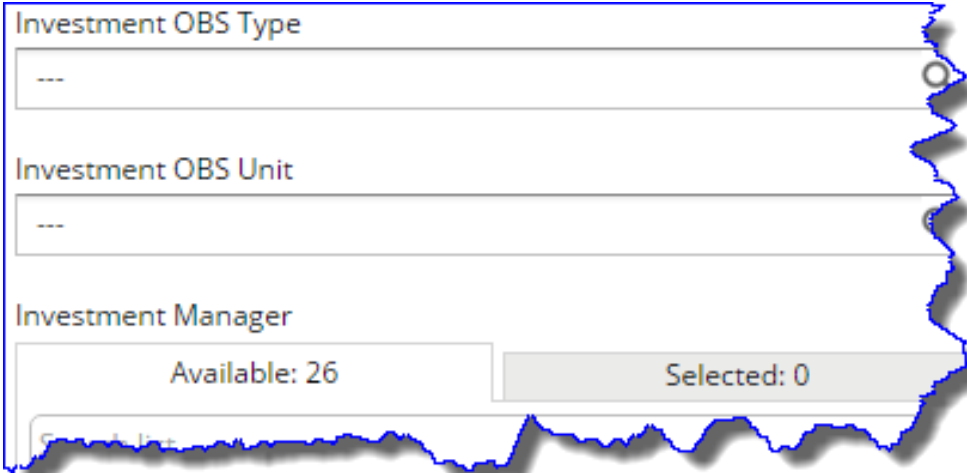
Times:  
Hours (required):  
0  
Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17  
Minutes (required):  
0  
Enter 0, 15, 30, 45 to run every 1/4 hour

Schedule End  
End Date:  
[Date Picker]

# 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



The screenshot displays a web interface for setting report parameters. It features three dropdown menus stacked vertically. The first dropdown is labeled 'Investment OBS Type' and shows '---'. The second dropdown is labeled 'Investment OBS Unit' and also shows '---'. The third dropdown is labeled 'Investment Manager' and shows 'Available: 26' and 'Selected: 0'. Below the 'Investment Manager' dropdown, there is a partially visible dropdown labeled '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.

Output File Options

File name (required):

Description:

Time Zone:

Output Locale:

Formats:

<input type="checkbox"/> CSV	<input type="checkbox"/> HTML	<input type="checkbox"/> RTF
<input type="checkbox"/> DOCX	<input type="checkbox"/> ODS	<input type="checkbox"/> XLSX
<input type="checkbox"/> Excel	<input type="checkbox"/> ODT	<input type="checkbox"/> XLSX (Paginated)
<input type="checkbox"/> Excel (Paginated)	<input checked="" type="checkbox"/> PDF	<input type="checkbox"/> PPTX

File Handling:

☒ Overwrite Files

☐ Sequential File Names by Timestamp

Timestamp Pattern:

# 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.

The screenshot shows a configuration window titled "Email Notification". It is divided into two main sections: "Send report when scheduler runs" on the left and "Send job status notifications" on the right.

**Send report when scheduler runs:**

- To:** A text input field with a placeholder "Use commas to separate addresses".
- CC:** A text input field with a placeholder "Use commas to separate addresses".
- BCC:** A text input field with a placeholder "Use commas to separate addresses".
- Subject:** A text input field with a placeholder "Use commas to separate addresses".
- Message:** A large text area for the email body.
- Options:**
  - ☒ Include reports as repository links in email body
  - ☐ Include report files as attachments
  - ☐ Include report files as ZIP attachment
  - ☐ Include HTML report in email body
  - ☐ Do not send emails for empty reports

**Send job status notifications:**

- To:** A text input field with a placeholder "Use commas to separate addresses".
- Subject:** A text input field with a placeholder "Use commas to separate addresses".
- Send success notification:** ☐ (When checked, a "Success Message:" text area is visible).
- Send failure notification:** ☐ (When checked, a "Failure Message:" text area is visible).
- Additional options:**
  - ☐ Include report job information
  - ☐ Include stack trace



# Exercise 8: Scheduling a Report

Let Rego be your guide.



# Exercise 9: Create Your Own

Let Rego be your guide.

# 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

The screenshot displays the Jaspersoft Advanced Reporting interface. On the left is a sidebar with navigation options like 'New Dashboard', 'Dashboards', 'Reports', and 'Data'. The main area shows a report titled 'By Project Type' with a table of data. The table has columns for 'Project Name', 'Project Manager', 'Status', 'Project Date', 'Status', 'Allocation', 'Risk', 'Resource Allocation', and 'Resource Allocation'. The data is organized into rows, with some rows highlighted in green and others in red, indicating different project statuses or risk levels.

Project Name	Project Manager	Status	Project Date	Status	Allocation	Risk	Resource Allocation	Resource Allocation
Project A	John Doe	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project B	Jane Smith	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project C	Mike Johnson	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project D	Sarah Lee	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project E	David Brown	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project F	Emily White	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project G	James Green	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project H	Olivia Black	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project I	Noah Grey	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project J	Aria Gold	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project K	Liam Silver	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project L	Mia Bronze	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project M	Ben Copper	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project N	Charlotte Iron	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project O	Lucas Steel	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project P	Grace Tin	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project Q	Henry Lead	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project R	Isabella Zinc	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project S	Jack Nickel	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project T	Chloe Cobalt	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project U	William Manganese	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project V	Amelia Silicon	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project W	Benjamin Germanium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project X	Harper Arsenic	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project Y	James Selenium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project Z	Charlotte Tellurium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AA	Lucas Polonium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AB	Mia Astatine	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AC	Benjamin Francium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project AD	Charlotte Radium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AE	James Actinium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AF	Harper Thorium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AG	William Protactinium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project AH	Amelia Uranium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AI	Benjamin Neptunium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AJ	Charlotte Plutonium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AK	James Americium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project AL	Harper Curium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AM	William Berkelium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AN	Mia Californium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AO	Benjamin Einsteinium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project AP	Charlotte Fermium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AQ	James Mendelevium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AR	Harper Nobelium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AS	William Lawrencium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project AT	Amelia Rutherfordium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AU	Benjamin Dubnium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AV	Charlotte Seaborgium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AW	James Bohrium	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project AX	Harper Hassium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project AY	William Meitnerium	Delayed	2023-01-01	Delayed	60%	High	60%	60%
Project AZ	Mia Darmstadtium	On Track	2023-01-01	On Track	100%	Low	100%	100%
Project BA	Benjamin Tennessine	At Risk	2023-01-01	At Risk	80%	Medium	80%	80%
Project BB	Charlotte Oganesson	On Track	2023-01-01	On Track	100%	Low	100%	100%



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- Click on **Maintain My Certification**
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- 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.



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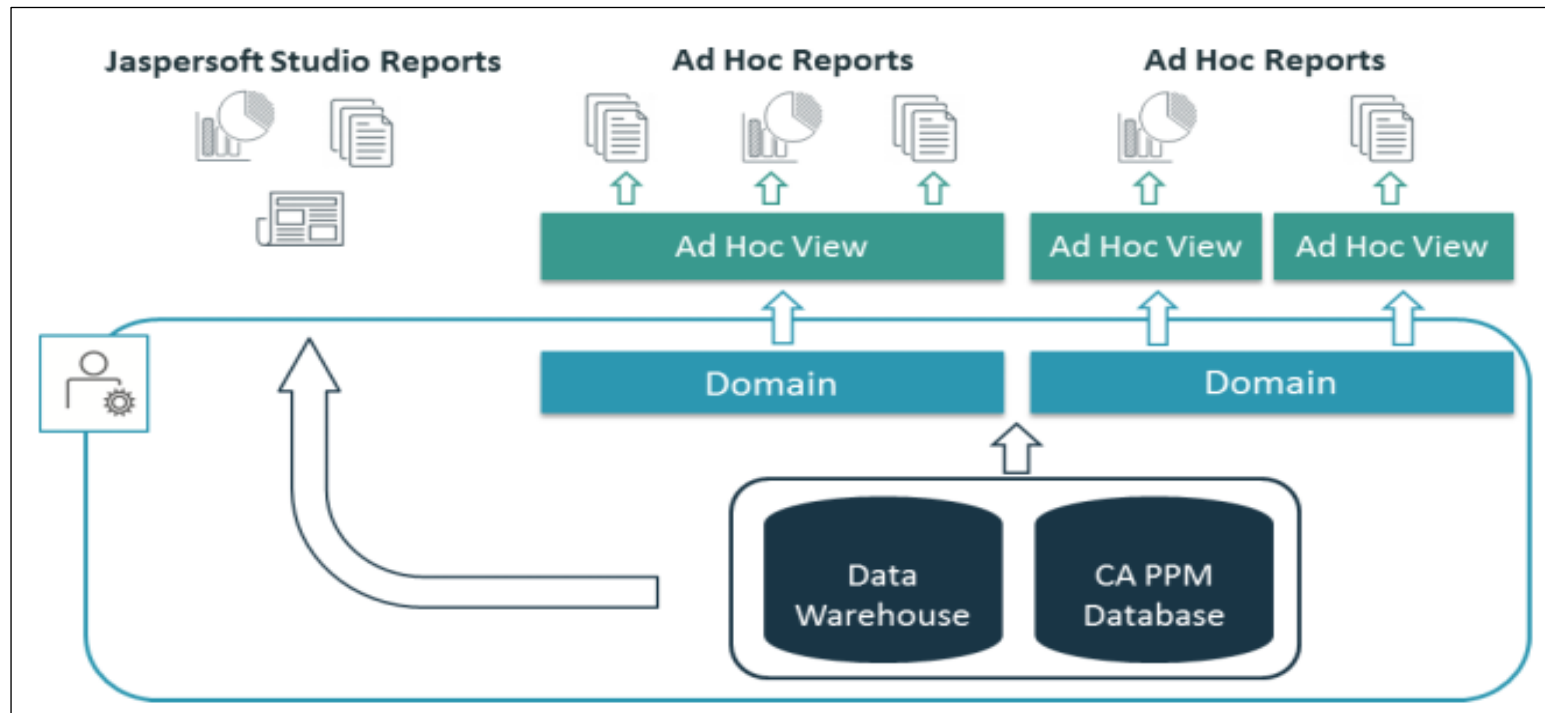
# Appendix

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- Jaspersoft Technical Overview
- Configuring Custom Attributes
- Jaspersoft Jobs
- Jaspersoft Security Administration
- Jaspersoft Users and Roles
- Create a custom Domain

# 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.*

The screenshot shows the 'Object: Risk | Attribute: Escalate - Object Attribute' configuration page. The 'General' tab is active. The 'Attribute Name' field contains 'Escalate'. The 'Attribute ID' field contains 'ahs\_escalate'. The 'Read-Only' checkbox is unchecked. The 'Include in the Data Warehouse' checkbox is checked, and a callout box points to it with the text 'Check to include the attribute in the warehouse.'

Object: Risk | Attribute: Escalate - Object Attribute

General

Attribute Name Escalate

Attribute ID ahs\_escalate

Read-Only ☐

Include in the Data Warehouse ☒ Check to include the attribute in the warehouse.

# 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



Name (required):  
Project Management

Resource ID (read-only):  
CSK\_PRJ\_Management

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.

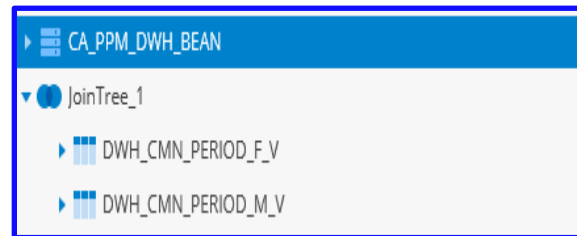
8. Add the following DWH tables you want to bring into your new domain to the selected tables
9. Click the Joins tab
10. Join the two tables based on the data need.

JoinTree_1	Type	Weight	
▼ DWH_INV_INVESTMENT ⌘ DWH_INV_INVESTMENT_LN DWH_INV_INVESTMENT.INVESTMENT_KEY == DWH_INV_INVESTMENT_LN.INVESTMENT_KEY and DWH_INV_INVESTMENT_LN.LANGUAGE_CODE == DWH_INV_INVESTMENT_LN.CALC_LANGUAGE_CODE	Inner ▼	1 ▼	
▼ DWH_INV_INVESTMENT ⌘ DWH_INV_PROJECT DWH_INV_INVESTMENT.INVESTMENT_KEY = ▼ DWH_INV_PROJECT.INVESTMENT_KEY	Inner ▼	1 ▼	
▼ DWH_INV_PROJECT ⌘ DWH_INV_PROJECT_LN DWH_INV_PROJECT.INVESTMENT_KEY == DWH_INV_PROJECT_LN.INVESTMENT_KEY and DWH_INV_PROJECT_LN.LANGUAGE_CODE == DWH_INV_PROJECT_LN.CALC_LANGUAGE_CODE	Inner ▼	1 ▼	
▼ DWH_INV_INVESTMENT ⌘ DWH_INV_OBS_MAPPING DWH_INV_INVESTMENT.INVESTMENT_KEY = ▼ DWH_INV_OBS_MAPPING.INVESTMENT_KEY	Left Outer ▼	1 ▼	
▼ DWH_INV_INVESTMENT ⌘ DWH_INV_SUMMARY_FACTS DWH_INV_INVESTMENT.INVESTMENT_KEY = ▼ DWH_INV_SUMMARY_FACTS.INVESTMENT_KEY	Inner ▼	1 ▼	

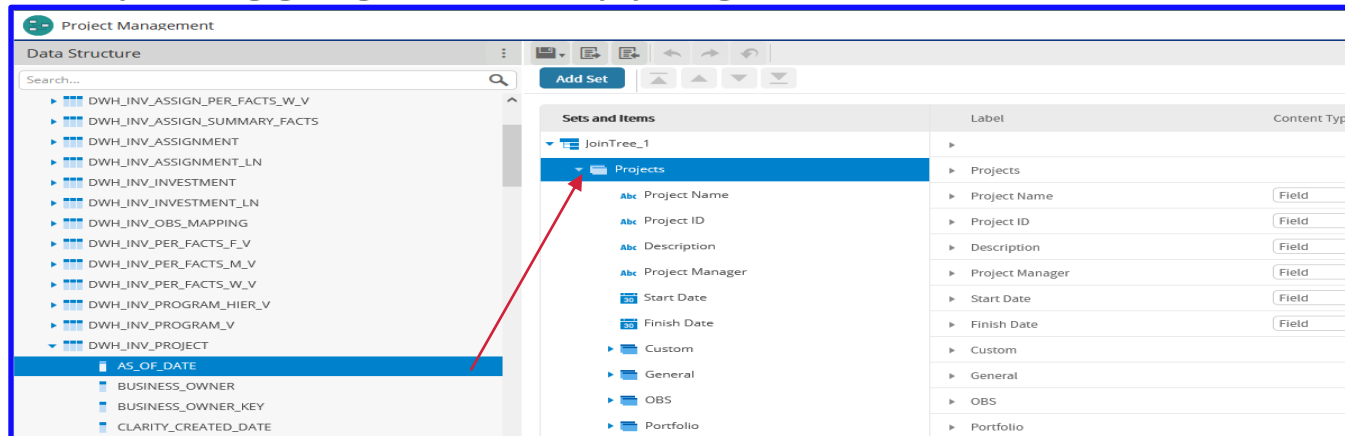
Available Tables	Selected Tables
Search...	Search...
CMN_DB_HISTORY CMN_DWH_INSTALL_HISTORY DWH_CFG_AUDIT DWH_CFG_AUDIT_HISTORY DWH_CFG_EXTRA_COLUMNS DWH_CFG_LOG DWH_CFG_OBJECT_TYPE DWH_CFG_SETTINGS DWH_CFG_SETTINGS_HISTORY DWH_CMN_ERROR_MESSAGE DWH_CMN_ERROR_MSG_HISTORY DWH_CMN_EXCHANGE_RATE DWH_CMN_MV_LOOKUP DWH_CMN_OBS_HIERARCHY DWH_CMN_PERIOD DWH_CMN_PERIOD_LN DWH_CMN_PERIOD_MAPPING	DWH_CMN_PERIOD_F_V DWH_CMN_PERIOD_M_V DWH_CMN_PERIOD_W_V DWH_INV_ASSIGNMENT DWH_INV_ASSIGNMENT_LN DWH_INV_ASSIGN_PER_FACTS_F_V DWH_INV_ASSIGN_PER_FACTS_M_V DWH_INV_ASSIGN_PER_FACTS_W_V DWH_INV_ASSIGN_SUMMARY_FACTS DWH_INV_INVESTMENT DWH_INV_INVESTMENT_LN DWH_INV_OBS_MAPPING DWH_INV_PER_FACTS_F_V DWH_INV_PER_FACTS_M_V DWH_INV_PER_FACTS_W_V DWH_INV_PROGRAM_HIER_V DWH_INV_PROGRAM_V

# Create a Custom Domain Cont.

7. Click the Data Presentation 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 dragging and dropping it under the set



# Create a Custom Domain Cont.

10. Once the attribute is added to the set click the Pencil icon next to attribute on the right side



A screenshot of a domain attribute editor. It shows a list of attributes. The first attribute is 'Project Name', which is highlighted with a blue border. To the right of the attribute name is a small pencil icon, also highlighted with a red border, indicating it can be edited.

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



A screenshot of a domain attribute editor showing a list of attributes. The list is enclosed in a blue border. Each attribute has a name and a type (Field) with a dropdown arrow. The attributes are: Project Name, Project ID, Description, Project Manager, Start Date, and Finish Date.

▶ Project Name	Field ▼
▶ Project ID	Field ▼
▶ Description	Field ▼
▶ Project Manager	Field ▼
▶ Start Date	Field ▼
▶ Finish Date	Field ▼

# Questions?



Let Rego be your guide.

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