



Jaspersoft Ad-Hoc Reporting

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Overview

- Introduction
- Reporting Tools Available
- Why Jaspersoft?
- Jaspersoft Ad-Hoc Demo
- Steps to Migrate to Jaspersoft
- Ad-Hoc Setup



Jaspersoft Introduction

- New in CA PPM 14.2
- Full Suite of Reporting Tools
- Replaces Business Objects
- Runs on top of CA PPM

The screenshot displays the CA PPM Jaspersoft web application interface. The top navigation bar includes the CA PPM logo, user information (System Administrator), and links for Logout, Learn, and Help. Below this is a secondary navigation bar with tabs for Home, Administration, and Favorites. A third bar contains a search icon and a dropdown menu with options: Library, View, Manage, and Create. The main content area is titled 'Home' and features a sidebar on the left with a 'Recently Viewed Items' section. This section contains a table listing various reports and their types. The main area is a grid of six tool categories, each with an icon, title, description, and links to 'Create' and 'View list' (or 'View options' for Admin).

Recently Viewed Items	
Project Risks (Table)	Ad Hoc view
Investments (Table)	Ad Hoc view
Project Storyboard	Report
KPIs by Project Type (Dashboard)	Report
KPIs by Project Type	Report
Project Cost and Effort	Report
Project Status Detail	Report
Project Risk, Issue, and Change Summary	Report
Project Risk Register	Report
ProjectListbyPM View	Ad Hoc view

Data Sources
Define connection to a database or other data source.
[View tutorial](#)

Create View list

Domains
Add structure to a data source for use in an Ad Hoc view.
[View tutorial](#)

Create View list

Ad Hoc Views
Visualize your data for analysis and report creation. [View tutorial](#)

Create View list

Reports
Create and format interactive reports from existing Ad Hoc views. [View tutorial](#)

Create View list

Dashboards
Combine related reports into custom dashboard layouts.
[View tutorial](#)

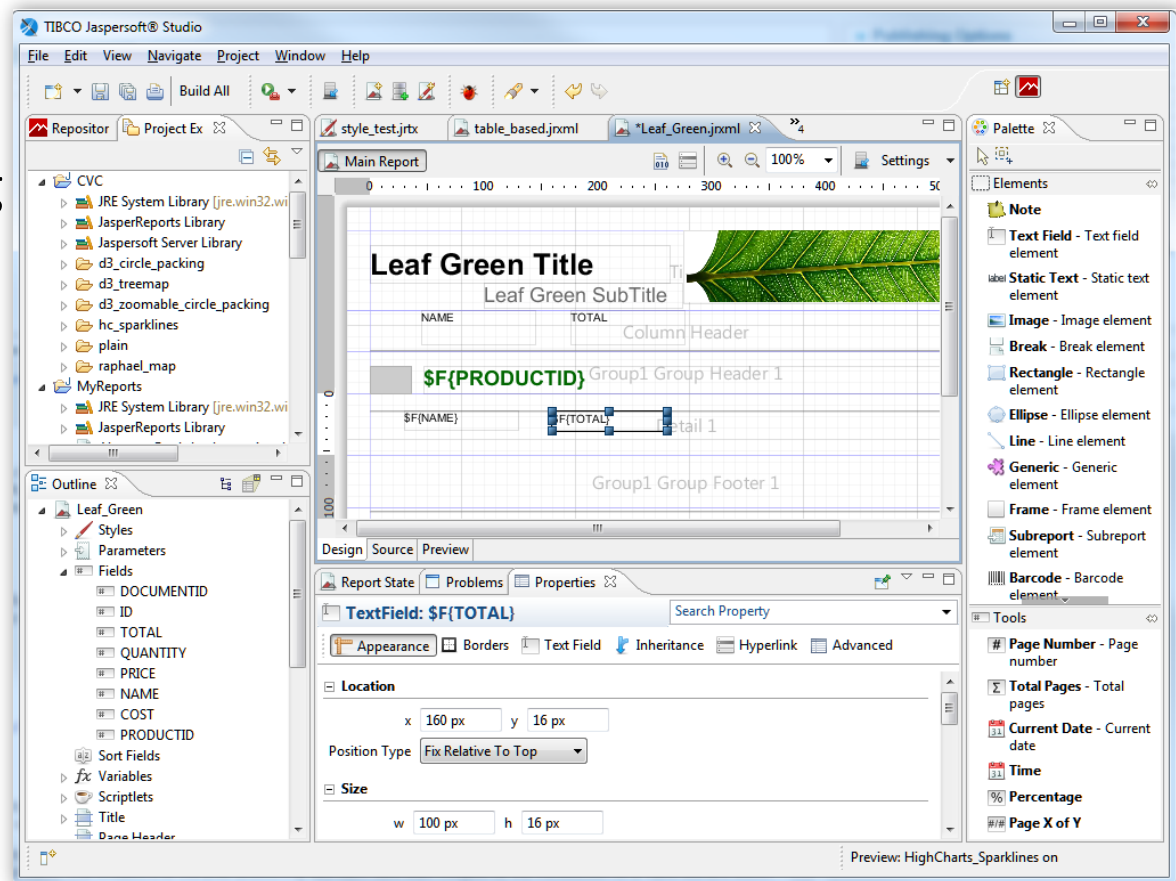
Create View list

Admin
Configure your server instance and manage user settings.

View options

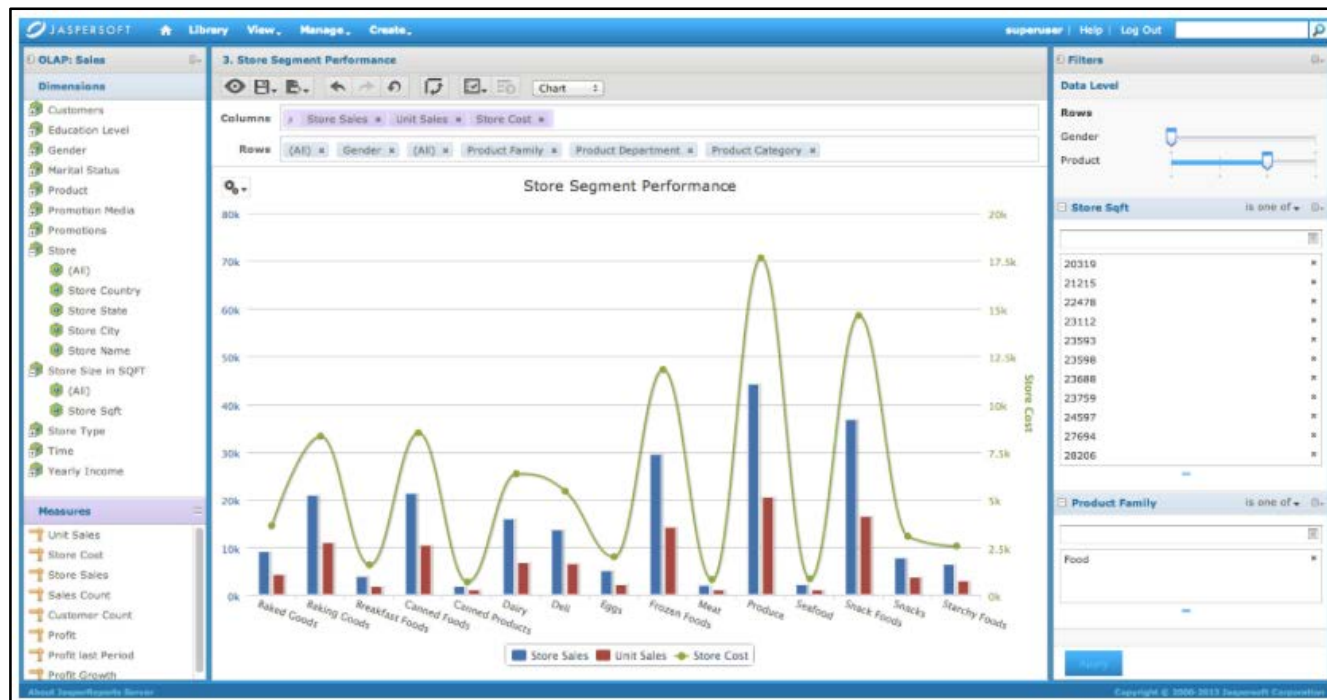
Jaspersoft Report Types

- Studio Reports
 - Pixel perfect
 - Robust reporting abilities



Jaspersoft Report Types

- Ad-Hoc Reports
 - Quick to create
 - Technical background not needed
 - Small amount of training needed



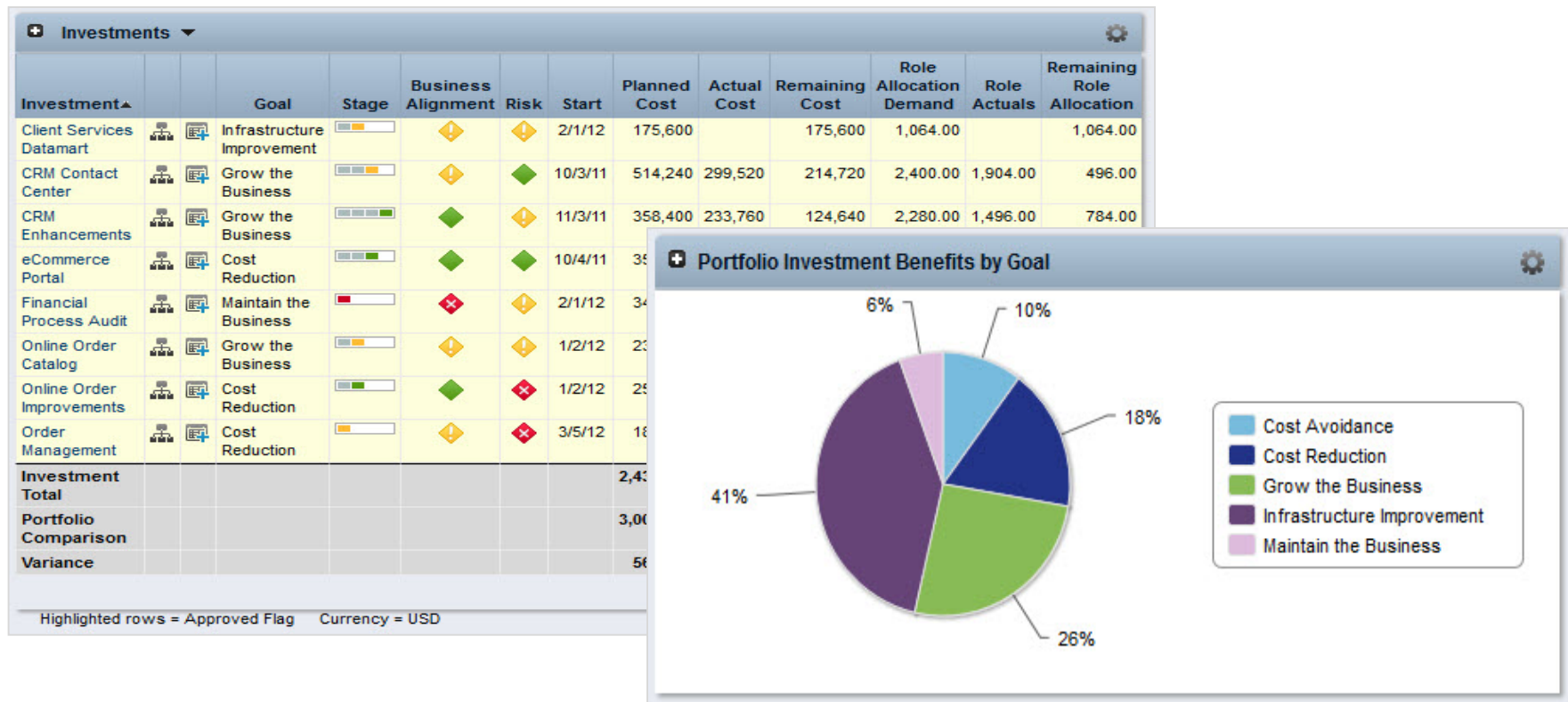
Jaspersoft Report Types

- Dashboards
 - Combine multiple reports
 - Add images & web pages
 - Easy & fast to create



Jaspersoft Report Types

- Portlets
 - Fully integrated into CA PPM



When to Use Each Reporting Tool

- Studio Reports
 - There are very specific requirements on how the report should look and none of the other tools will accommodate
- Ad-Hoc
 - You want power users to build their own reports or data extracts, or you need to create a large number of reports quickly
- Dashboards
 - Need to combine multiple ad-hoc reports into a single view
- Portlets
 - The target audience are CA PPM users who view the information in the browser or export to Excel, and no specific format is required

Why Jaspersoft Ad-Hoc Reporting

- Create reports more quickly than other reporting methods
- Non-technical CA PPM end users can create their own reports or data extracts – relieve burden of technical staff
- Drag and Drop interface right in CA PPM in the browser
- Schedule & Email reports – HTML directly in email or attachment
- Export to PDF, Excel, Word, CSV, and PPT

The screenshot shows the Jaspersoft Ad-Hoc Reporting interface. Annotations with arrows point to various components:

- Change source/Select fields:** Points to the 'Fields' list on the left, which includes Accounts, Opportunities, and Users.
- Tool bar:** Points to the top toolbar containing icons for view, save, print, undo, redo, and other actions.
- View Type menu:** Points to the 'Table' dropdown menu.
- Data Mode menu:** Points to the 'Sample Data' dropdown menu.
- Filter controls:** Points to the 'Filters' panel on the right, showing a filter for 'A. Account State' with a list of states (BC, CA, DF, Guerrero, Jalisco, Mexico) and a 'Select All' option.
- Layout band:** Points to the area between the 'Columns' and 'Groups' sections.
- Canvas:** Points to the main report area displaying a table of data.

The main report area displays a table with the following data:

Opportunity	Amount
Altadena	
B & D Wolter Machinery - 2400 units - Max	45,030.00
G & T Beatty Engineeri - 2700 units - Matt	11,540.00
Zimmerman-Evans Constr - 3300 units - Kristen	2,950.00
Minnear-Robinson Comm - 2400 units - Beth	3,210.00



Demo

Migrating from BO to Jaspersoft

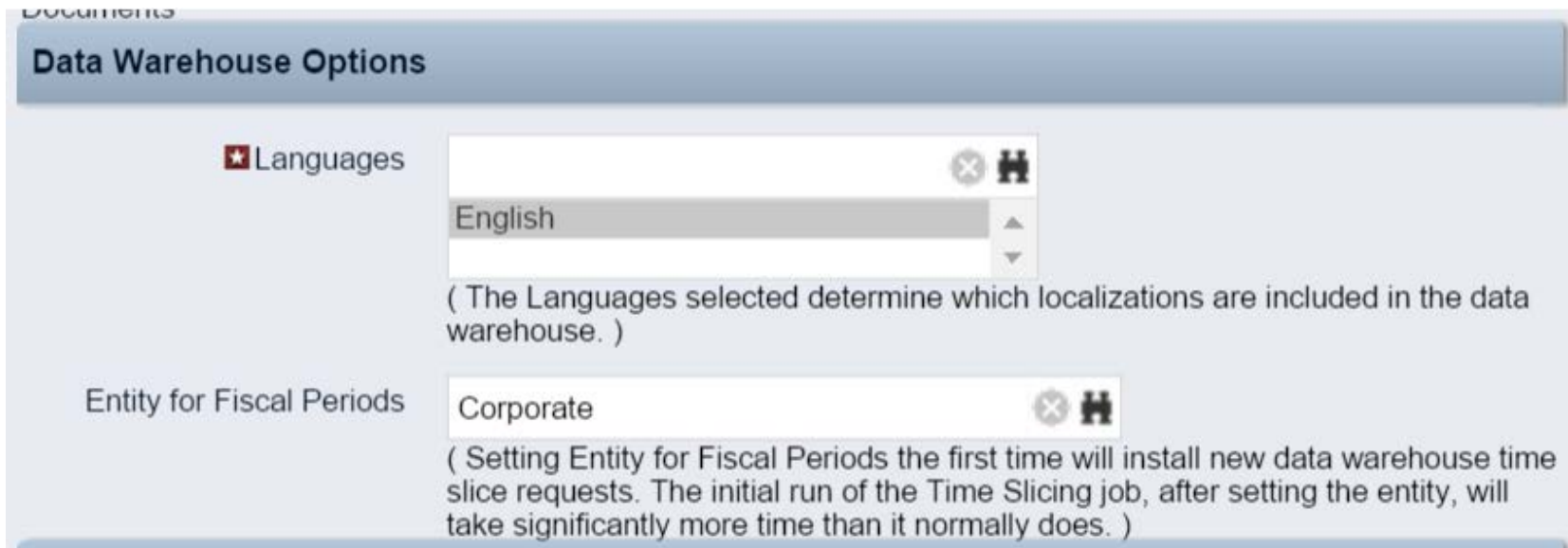
- Custom Crystal Reports, Xcelsius, WEBI Reports and Universes will NOT be automatically converted
- Studio reports should be a last resort, first:
 - Review OOTB reports & portlets
 - If possible, create as a portlet, ad-hoc report, or dashboard
- Studio report creation
 - Crystal Queries can be reused to rebuild the new studio report
 - Use templates for consistent formatting
- Jaspersoft Ad-Hoc Training
- In CA PPM 14.2, BO and Jaspersoft can run side-by-side, so it's a great time to make the switch

A large blue triangle pointing upwards, located on the right side of the slide, containing the title text.

Setting up Ad-Hoc Reporting

Ad-Hoc Setup

- Go to Administration -> CA PPM -> System Options
- Fill out the language and entity



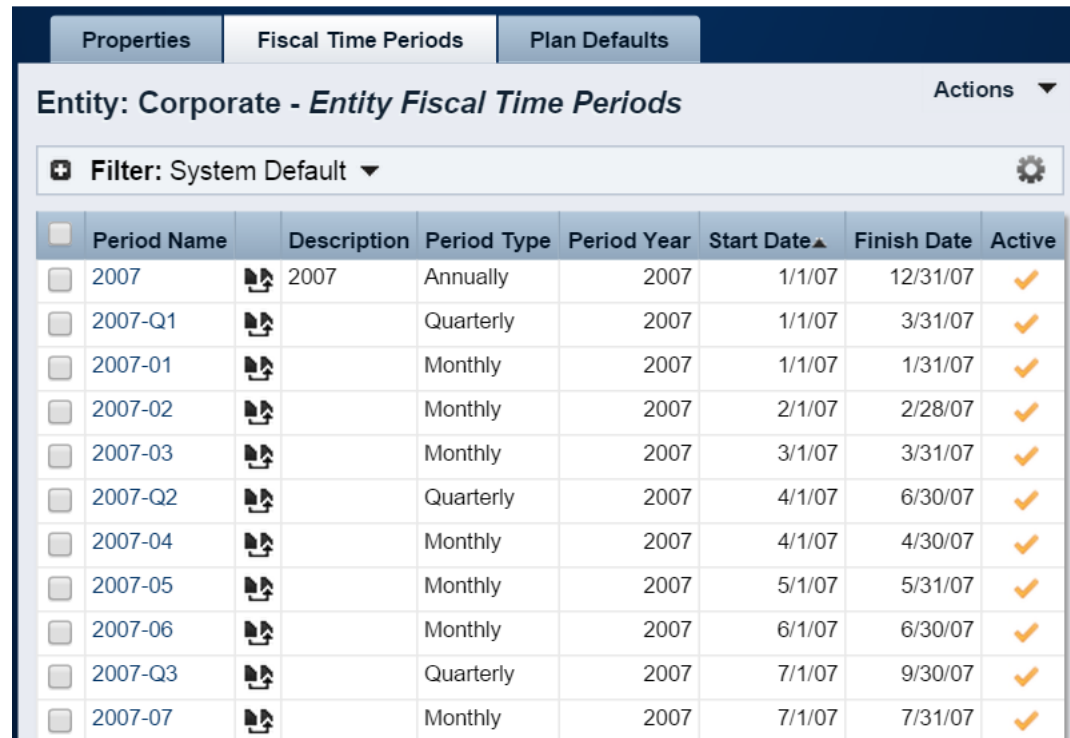
The screenshot shows a web-based configuration interface titled "Data Warehouse Options". It contains two main sections: "Languages" and "Entity for Fiscal Periods".

Languages: This section has a red star icon and a text input field containing "English". To the right of the input field are a close button (X) and a help icon (H). Below the input field is a list of languages, with "English" selected and highlighted. A note below this section states: "(The Languages selected determine which localizations are included in the data warehouse.)".

Entity for Fiscal Periods: This section has a text input field containing "Corporate". To the right of the input field are a close button (X) and a help icon (H). A note below this section states: "(Setting Entity for Fiscal Periods the first time will install new data warehouse time slice requests. The initial run of the Time Slicing job, after setting the entity, will take significantly more time than it normally does.)".

Ad-Hoc Setup

- Go to Administration -> Finance -> Setup
- Click on Entities, then click on your entity name
- Click on the Fiscal Time Periods tab, and make sure these are setup and active



The screenshot displays the 'Fiscal Time Periods' tab for a corporate entity. The table lists various fiscal periods for the year 2007, including monthly and quarterly periods, all of which are marked as active.

	Period Name	Description	Period Type	Period Year	Start Date▲	Finish Date	Active
<input type="checkbox"/>	2007	2007	Annually	2007	1/1/07	12/31/07	✓
<input type="checkbox"/>	2007-Q1		Quarterly	2007	1/1/07	3/31/07	✓
<input type="checkbox"/>	2007-01		Monthly	2007	1/1/07	1/31/07	✓
<input type="checkbox"/>	2007-02		Monthly	2007	2/1/07	2/28/07	✓
<input type="checkbox"/>	2007-03		Monthly	2007	3/1/07	3/31/07	✓
<input type="checkbox"/>	2007-Q2		Quarterly	2007	4/1/07	6/30/07	✓
<input type="checkbox"/>	2007-04		Monthly	2007	4/1/07	4/30/07	✓
<input type="checkbox"/>	2007-05		Monthly	2007	5/1/07	5/31/07	✓
<input type="checkbox"/>	2007-06		Monthly	2007	6/1/07	6/30/07	✓
<input type="checkbox"/>	2007-Q3		Quarterly	2007	7/1/07	9/30/07	✓
<input type="checkbox"/>	2007-07		Monthly	2007	7/1/07	7/31/07	✓

Ad-Hoc Setup

- Go to Administration -> Time Slices
- Review the new DWH time slices and modify if necessary

<input type="checkbox"/>	ID	Time Slice	Rollover Interval	From	Slice Period	Number of Periods	Item	Expiration	Data Warehouse	Last Run
<input type="checkbox"/>	1000008	assignment::etccost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Assignment::ETC Cost	10/1/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000010	baseline::current_team_usage::dwh_month	Monthly	9/1/12	Monthly	72	Current Baseline Team Usage	10/1/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000011	baseline::current_team_cost::dwh_month	Monthly	9/1/12	Monthly	72	Current Baseline Team Cost	10/1/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000012	team::hardallccost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Team::Hard Allocation Cost	10/1/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000013	assignment::actcost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Assignment::Actual Cost	10/1/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000014	team::alloccost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Team::Allocation Cost	10/1/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000023	assignment::etccost_curve::dwh_week	Weekly	7/28/14	Weekly	130	Assignment::ETC Cost	9/21/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000024	baseline::current_team_usage::dwh_week	Weekly	7/28/14	Weekly	130	Current Baseline Team Usage	9/21/15	✓	9/16/15 9:05 PM
<input type="checkbox"/>	1000025	baseline::current_team_cost::dwh_week	Weekly	7/28/14	Weekly	130	Current Baseline Team Cost	9/21/15	✓	9/16/15 9:05 PM

Ad-Hoc Setup

- Go to Administration -> Groups
- Add the new advanced reporting rights to the appropriate groups

<input type="checkbox"/>	Access Right▲	Description
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	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.
<input type="checkbox"/>	Advanced Reporting - Navigate	Allows resource to navigate to the Advanced Reporting page. Resource is assigned Jaspersoft role as ROLE_USER.
<input type="checkbox"/>	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.

Displaying 1 - 7 of 7



Ad-Hoc Setup

- Go to Administration -> Objects
- Go through each object, and check or uncheck the “include in data warehouse” box in order to set which custom fields/objects will be available to report on in Jaspersoft



Ad-Hoc Setup


- Go to Administration -> Reports & Jobs
- Find the two data warehouse jobs and activate them

<input type="checkbox"/>	Job Definition		ID	Description	Executable Type	File Name	System Type	Active
<input type="checkbox"/>	Load Data Warehouse		DWH_ETL_MASTER	Extracts data from the CA PPM database, transforms the data into a denormalized format and loads it into the CA PPM Data Warehouse	ETL	dwh_etl_master.kjb	System	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Load Data Warehouse Access Rights		DWH_SEC_LOAD_MASTER	Extracts access rights for investments and resources from the CA PPM database and loads them into CA PPM Data Warehouse	ETL	dwh_sec_load_master.kjb	System	<input checked="" type="checkbox"/>

Displaying 1 - 2 of 2

Ad-Hoc Setup

- Go to Home -> Reports & Jobs
- Run the Load Data Warehouse job, checking the box for “full load”
- Run the Load Data Warehouse Access Rights job

	Job Type▲	Description	Executable Type
	Load Data Warehouse	Extracts data from the CA PPM database, transforms the data into a denormalized format and loads it into the CA PPM Data Warehouse	ETL
	Load Data Warehouse Access Rights	Extracts access rights for investments and resources from the CA PPM database and loads them into CA PPM Data Warehouse	ETL

- Schedule the following to run on a recurring basis:
 - Load Data Warehouse – Full
 - Load Data Warehouse
 - Load Data Warehouse Access Rights

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