Jaspersoft Ad-Hoc Reporting

Presented by: Doug Greer | Prepared On: Sept 10, 2015

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

Jaspersoft Report Types

- Studio Reports
  - Pixel perfect
  - Robust reporting abilities
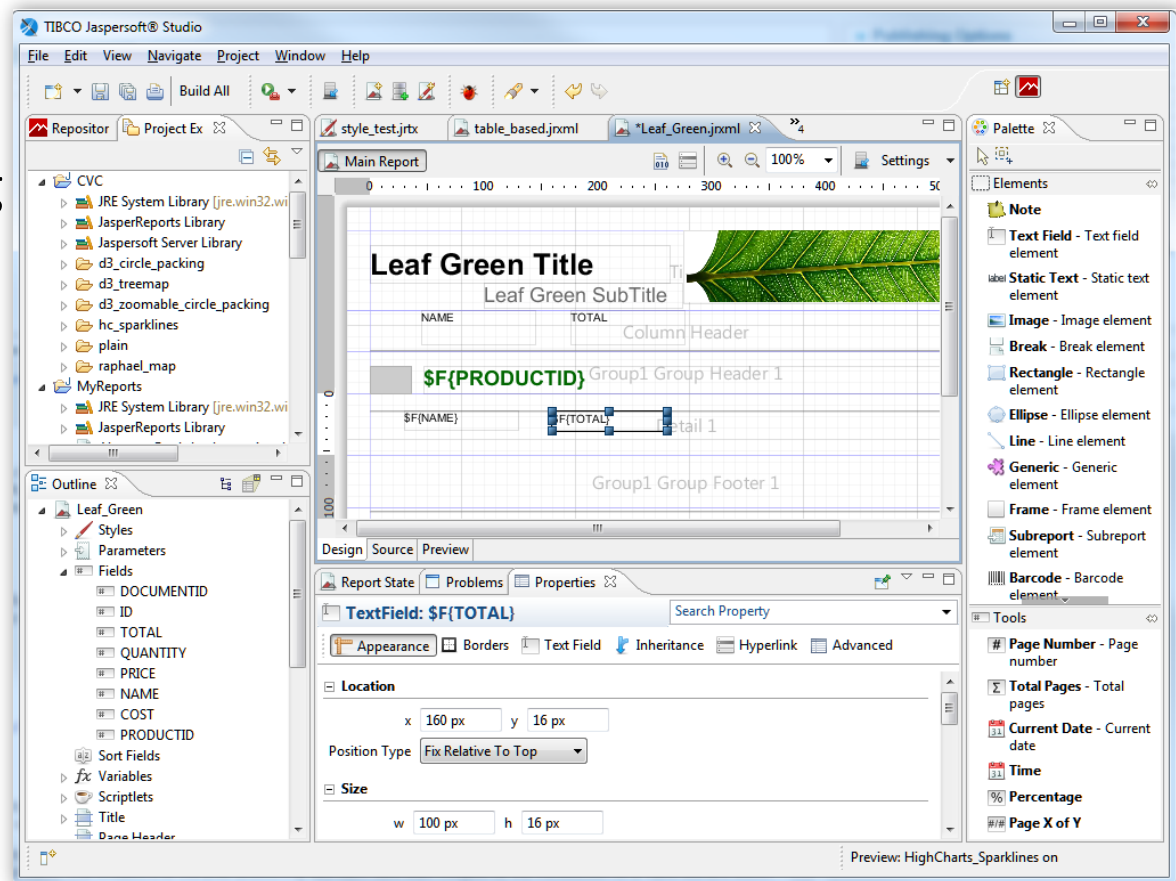
Jaspersoft Report Types

- **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
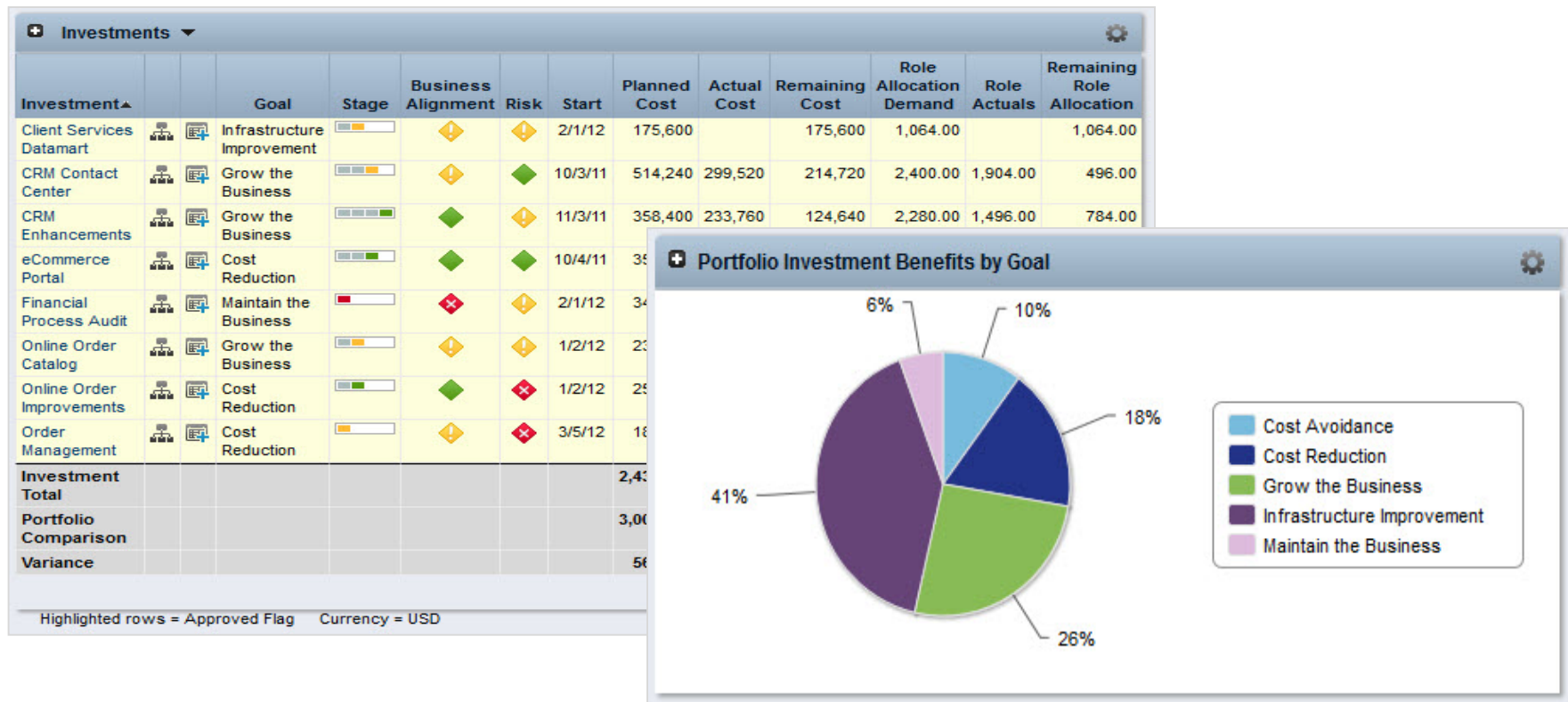
When to Use Each Reporting Tool

- Studio Reports
  - There are very specific requirements on how the report should look and none of the other tools will accommodate

- Ad-Hoc
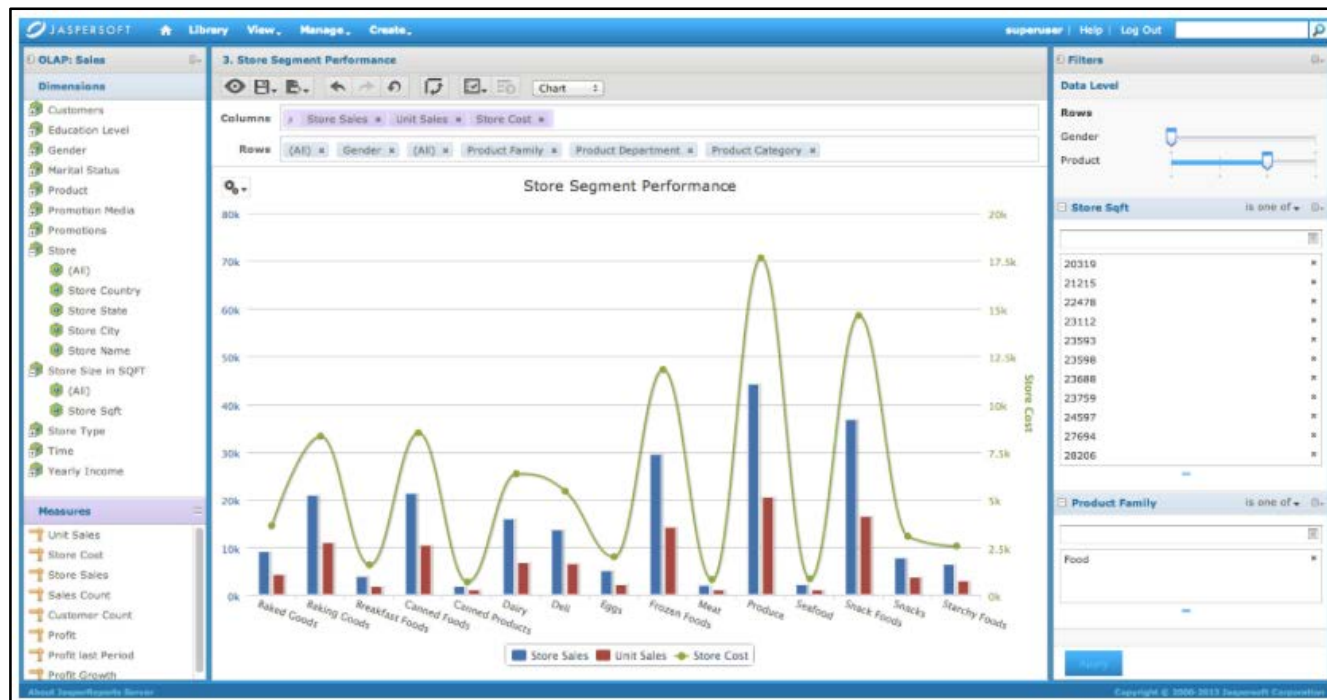 - You want power users to build their own reports or data extracts, or you need to create a large number of reports quickly

- 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

Demo

Migrating from BO to Jaspersoft
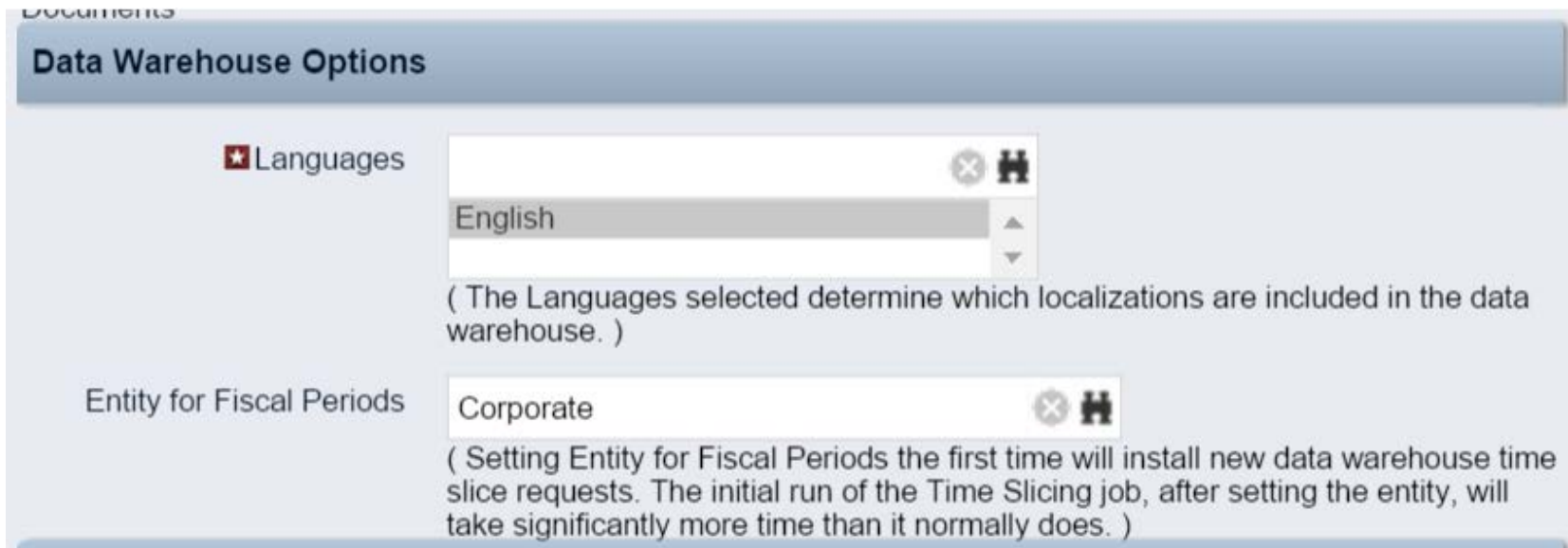
- Custom Crystal Reports, Xcelsius, WEBI Reports and Universes will NOT be automatically converted

- 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

Setting up Ad-Hoc Reporting

Ad-Hoc Setup

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

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
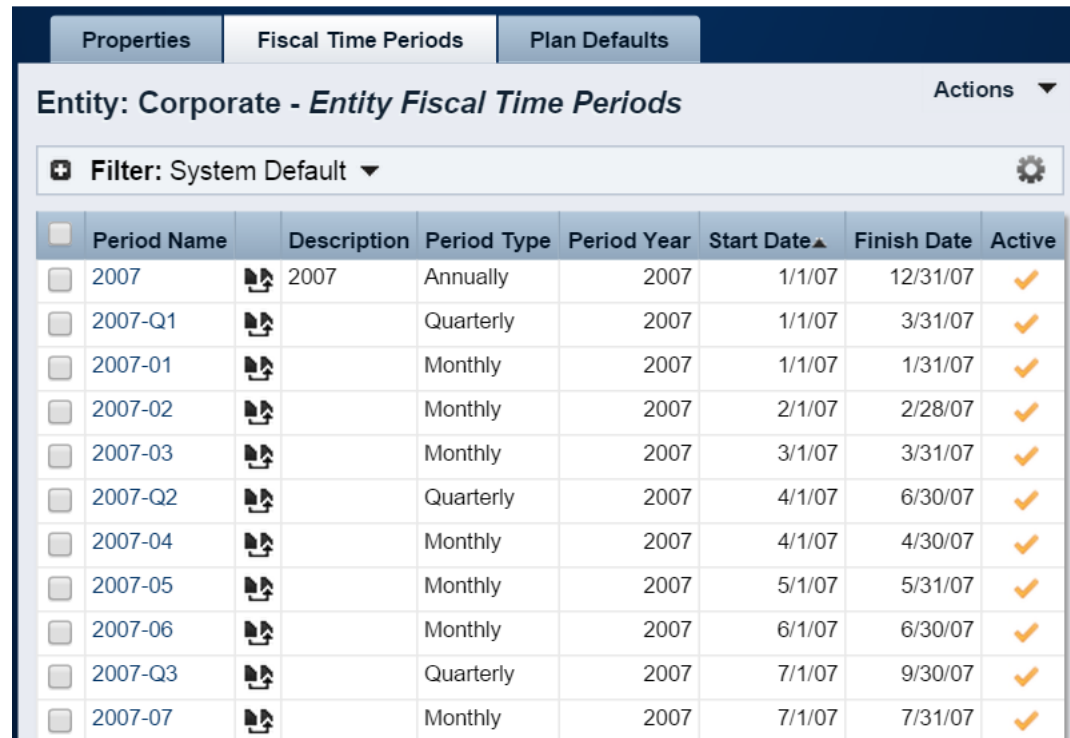
Ad-Hoc Setup

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

Time Slices

	ID	Time Slice	Rollover Interval	From	Slice Period	Number of Periods	Item	Expiration	Data Warehouse	Last Run
☐	1000008	assignment::etccost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Assignment::ETC Cost	10/1/15	✔	9/16/15 9:05 PM
☐	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
☐	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
☐	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
☐	1000013	assignment::actcost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Assignment::Actual Cost	10/1/15	✔	9/16/15 9:05 PM
☐	1000014	team::alloccost_curve::dwh_month	Monthly	9/1/12	Monthly	72	Team::Allocation Cost	10/1/15	✔	9/16/15 9:05 PM
☐	1000023	assignment::etccost_curve::dwh_week	Weekly	7/28/14	Weekly	130	Assignment::ETC Cost	9/21/15	✔	9/16/15 9:05 PM
☐	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
☐	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

	Access Right ▲	Description
☐	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.
☐	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.
☐	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.
☐	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.
☐	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.
☐	Advanced Reporting - Navigate	Allows resource to navigate to the Advanced Reporting page. Resource is assigned Jaspersoft role as ROLE_USER.
☐	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

Include in the Data Warehouse ✔

Ad-Hoc Setup

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

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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