

CA PPM

Jaspersoft Studio 6.1.0 Report Development Guide for SaaS

Release 14.3.00



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Chapter 1: Jaspersoft Studio and SaaS Connectivity

With the introduction of Jaspersoft and the new CA PPM data warehouse, getting management insights and business metrics is significantly simplified. CA PPM has capabilities now that are well beyond what was available in prior releases. Also, now that the platform is in place, new and powerful capabilities are available to us and will be forthcoming.

Reporting Improvements

CA PPM Release 14.3 provides the following advantages from a business information standpoint:

1. **Data Warehouse:** The CA PPM transactional database data model is complex, and the learning curve is somewhat steep. Customers experience poorly performing and inaccurate reports due to this complexity, which often results in additional consulting services or support cases. The data warehouse was designed to address these issues. The data model is in an easy to understand, business friendly format. Report developers now have a much simpler data model to work with, which reduces errors, optimizes performance, and simplifies report development.
2. **Domains:** Domains, or business views, are provided out of the box. These business views allow end users to quickly access information about Projects, Resources, Time, Financials, and other data.
3. **Ad Hoc/Self Service Reporting:** End users can develop their own management insights in minutes. This capability reduces formal report demand and allows developers to focus on the key management reports.
4. **Custom Fields:** Custom fields can be enabled in the data warehouse. End users and report developers both benefit. All information necessary for reporting is organized and delivered in basic business language.
5. **Schema Document:** We provide a comprehensive schema document, available on the CA Support site, with the entire data warehouse and transactional database. Report developers do not need database access to understand the data model or build queries. All of this information is provided in the documentation, which is auto-generated from the data model.
6. **Linking Capability:** The linking capability is embedded in the data warehouse to enable report writers to combine the data warehouse fields with any other elements from the transactional database, if required.

Connection Process for Report Development

Virtual Private Network (VPN) has been a problematic service to provide to customers. With Business Objects, it was not possible to create reports without direct connection to the database. Therefore, a secondary, direct database connection was set up. This is a significant compliance issue from an auditor standpoint, as well as a security concern for many of our customers. In addition, frequent password resets and other manual processes have been a point of frustration for our customers.

With Jaspersoft, you do not need a direct database connection to create reports. This new capability now allows us to simplify this process. From a report development standpoint, there may be a few extra steps. However, when viewed in light of everything we have discussed, this should be a very positive improvement for our customers.

Listed below are the items required for custom report development with Jaspersoft Studio Professional as well as Jaspersoft Domain creation. Please contact CA Support for this information.

- Advanced Reporting Server URL
- Organization ID
- Data Warehouse Database Schema
- CA PPM Database Schema

Summary

We provide simplified report creation and improved performance, while reducing the demand from end users for formal reporting. We provide better documentation, and we support custom configurations. We eliminated the compliance issues and cumbersome process of accessing the database through VPN. However, we added a few steps to report development. We feel the tradeoff here is well worth it and expect that most of our customers will as well.

Chapter 2: Creating a Jaspersoft User and Connecting

When a Jaspersoft report is run from CA PPM, a dynamic Java bean connection is used, which passes the database connection information and other variables such as username at runtime. You cannot use this same Java bean connection outside CA PPM while writing reports using the Jaspersoft Studio client application. During report creation, report writers do not have direct access to the database.

However, unlike our previous reporting solution, this does not stop you from building reports. It does change the process. In developing reports, you will need to follow the process for formatting reports as well as testing the report queries.

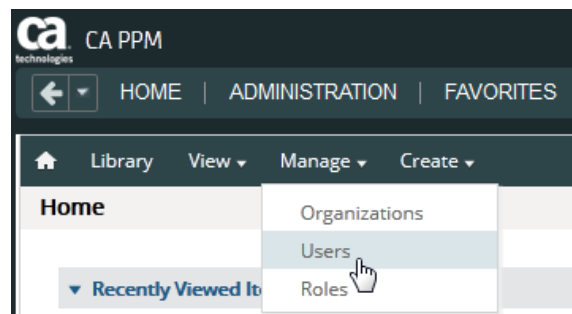
Report Development User

A non-linked user is required for report development in Jaspersoft Studio. Users created in Jaspersoft from CA PPM are created with an encrypted password. For report development purposes, we need to create a user for logging into Jaspersoft Studio directly. The user has no more rights than the Advanced Reporting Administration users in CA PPM, but has the ability to connect through Jaspersoft Studio.

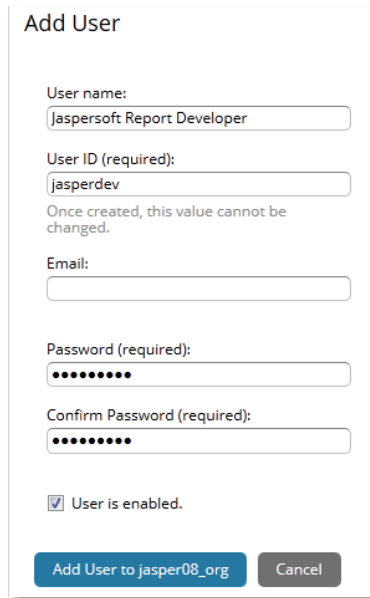
Create the Report Development User in Jaspersoft

Follow these steps:

1. Log in to CA PPM as a user with Advanced Reporting Administration rights.
2. Select Advanced Reporting.
3. Select Manage Menu / Users from the Jaspersoft sub menu.



4. The Organization in which to add a user should be selected in the left navigation pane. Here you can create a user in Jaspersoft that is not externally maintained by CA PPM.
5. Click the Add Users button in the middle pane above the user list.
6. Enter user name and password information, for example *jasperdev*, and then click Add User to add the user to your organization. This user is used for report development purposes, but cannot be used to log in to CA PPM.

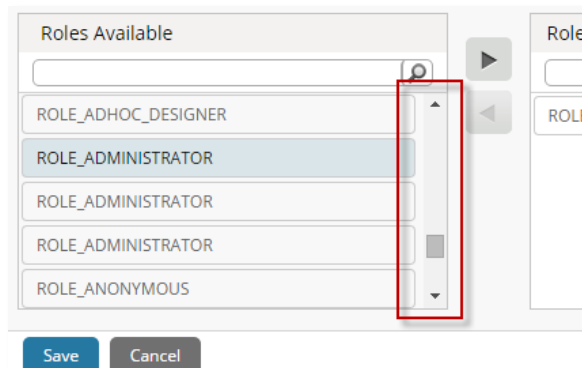


The 'Add User' form contains the following fields and controls:

- User name:** Text input with value 'Jaspersoft Report Developer'.
- User ID (required):** Text input with value 'jasperdev'. Below it, a note states: 'Once created, this value cannot be changed.'
- Email:** Empty text input.
- Password (required):** Password input field with masked characters (dots).
- Confirm Password (required):** Password input field with masked characters (dots).
- User is enabled:** A checked checkbox.
- Buttons:** 'Add User to jasper08_org' (blue) and 'Cancel' (grey).

- Once the user is created, click the Edit button on the properties page on the right side of screen.
- Locate the `ROLE_ADMINISTRATOR` role, click the left arrow to assign the permission, and click Save. The `ROLE_ADMINISTRATOR` grants permissions for users to modify and administer items under their organization in Jaspersoft.

Due to a known Jaspersoft issue, the Roles may not appear correctly unless the browser window is sized smaller to show a scroll bar. If you do not see the scroll bar, resize the browser application window until the scroll bars are shown, as in the following screen shot. Once the scroll bar appears, scroll down to `ROLE_ADMINISTRATOR`. This known issue also can cause the roles to be listed multiple times as well.



Chapter 3: Developing and Testing Report Queries

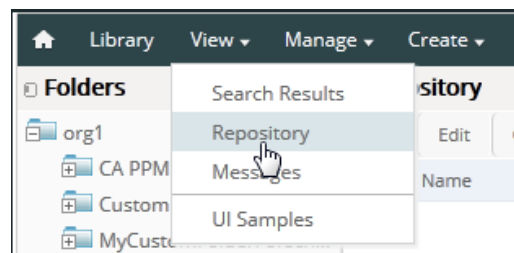
For SaaS customers, VPN will not be allowed when developing reports. Jaspersoft has alternatives to requiring VPN when testing queries. The following instructions explain how to set up four domains that can be used for viewing data and testing queries.

One Time Setup of Domains

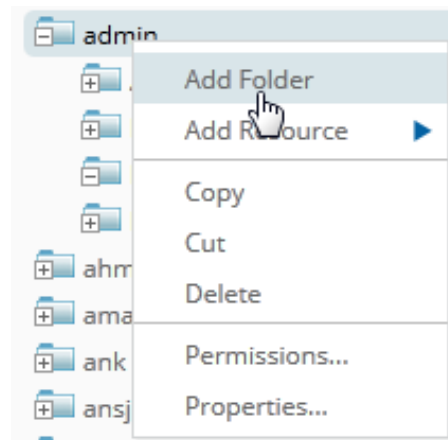
Create Domains Folder in the Repository

Follow these steps:

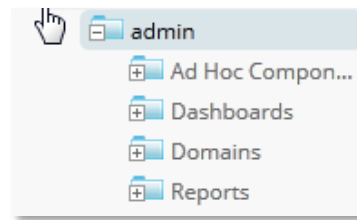
1. In CA PPM, click Advanced Reporting.
2. Select View, Repository.



3. Navigate to Users and expand your user folder. Look for a folder named Domains. If it is not there, right-click your user name, choose Add Folder, and name the folder Domains.



Now, under your name you should see following folder structure.



4. Next, click the home icon.



5. Click View List under Domains.



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](#)



Admin

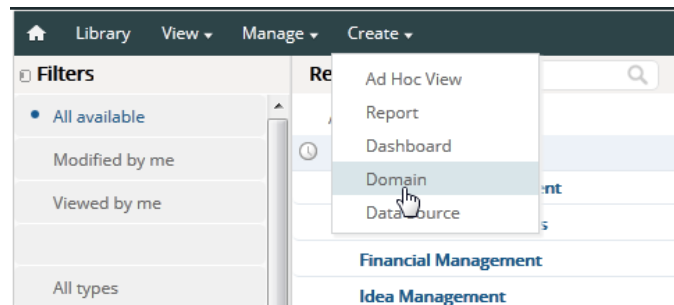
Configure your server instance and manage user settings.

[View options](#)

Create Domain for Viewing Data Warehouse Data

Follow these steps:

1. Determine if a domain called View DWH Data exists.
2. If the domain does not exist, create a new domain.



3. Enter the name View DWH Data.

Add New Domain

Set property values for the domain.

Required Information

Name (required):
View DWH Data

Resource ID (required):
View_DWH_Data

Description:
This domain is a place holder to be used when a developer needs to view data in the data warehouse

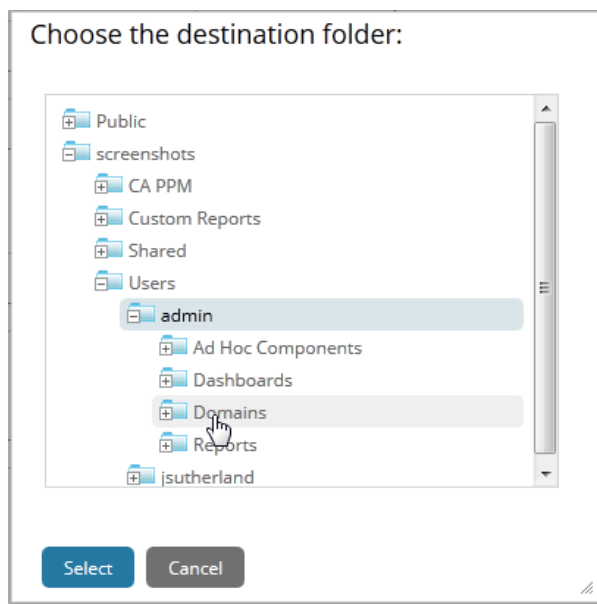
Save Location:
/users/admin/Domains

Data Source:
/ca_ppm/data_sources/CA_PPM_DWH_BEAN

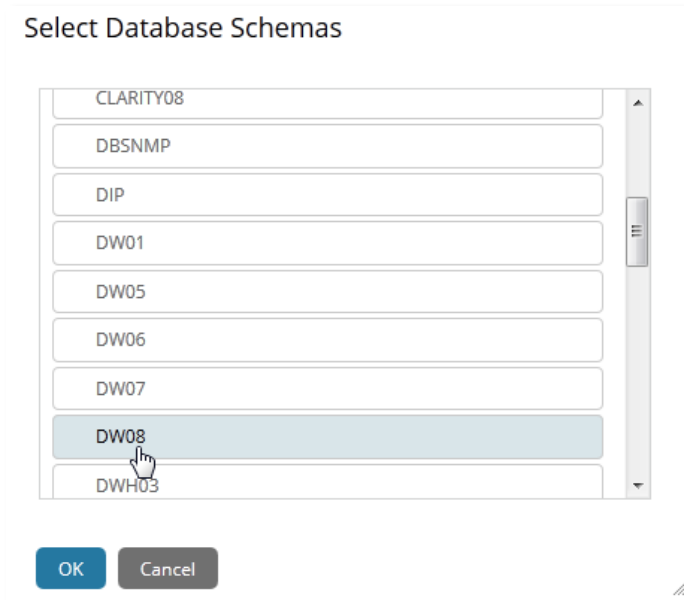
Browse...

Browse...

4. In the Save Location field, choose the Domains directory that you created earlier under your user directory.



5. In the Data Source field, choose the CA PPM DWH BEAN.
6. Click Create with Domain Designer.
7. Select your database schema from the list (the names are supplied by CA Support). In this example, DW08 is the data warehouse schema.



8. Click OK.

The data model is visible in the Data Source pane.

9. Choose the DWH_CMN_PERIOD table and move it to the Selected Tables pane.



10. Go to the Display tab.

11. Highlight the table and move it to the Sets and Items pane.



12. Click OK.

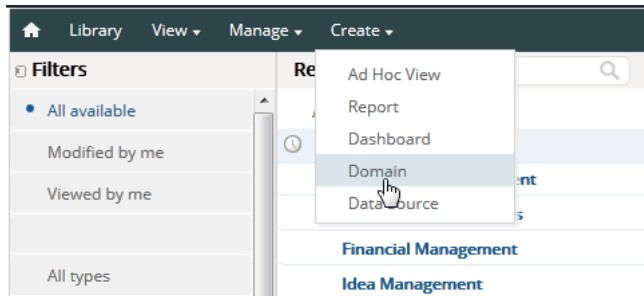
13. Click Submit.

This domain is now completed and will be used for viewing the data warehouse data.

Create Domain for Viewing CA PPM Data

Follow these steps:

1. Determine if a domain called View PPM Data exists.
2. If the domain does not exist, create a new domain.



3. Enter the name View PPM Data.

Add New Domain

Set property values for the domain.

Required Information

Name (required):
View PPM Data

Resource ID (required):
View_PPM_Data

Description:
This domain is a place holder to be used when a developer needs to view PPM data

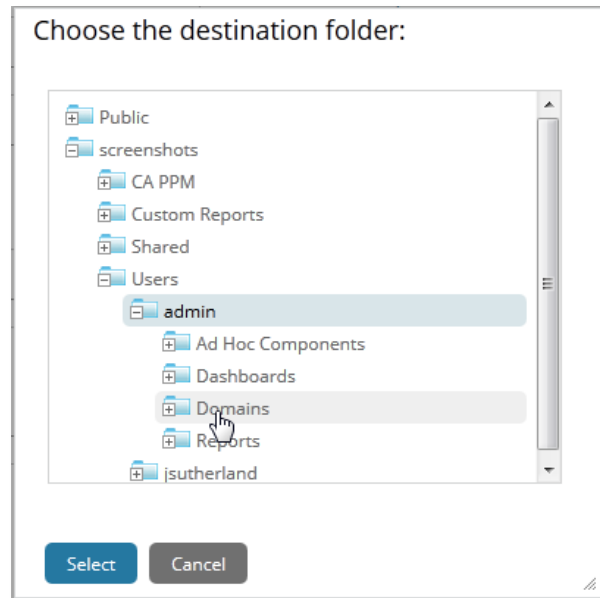
Save Location:
/users/admin/Domains

Browse...

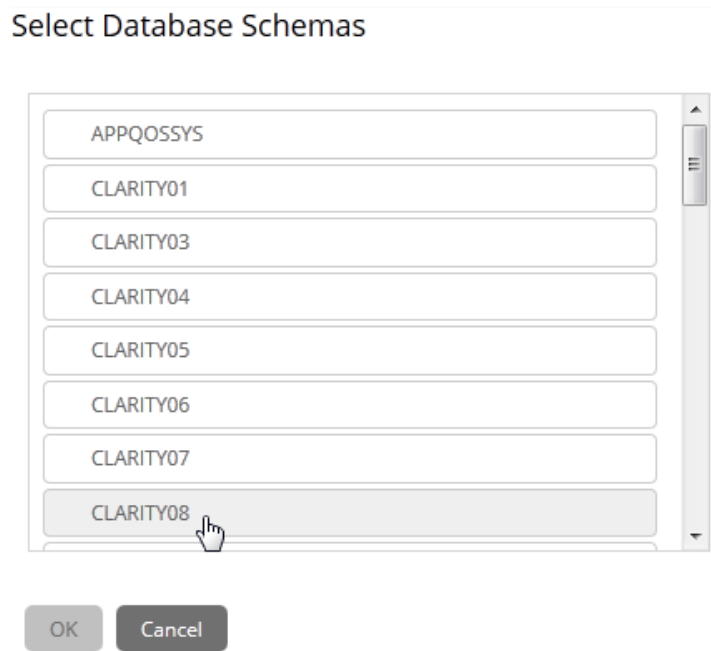
Data Source:
/ca_ppm/data_sources/CA_PPM_BEAN

Browse...

4. In the Save Location field, choose the Domains directory that you created earlier under your user directory.

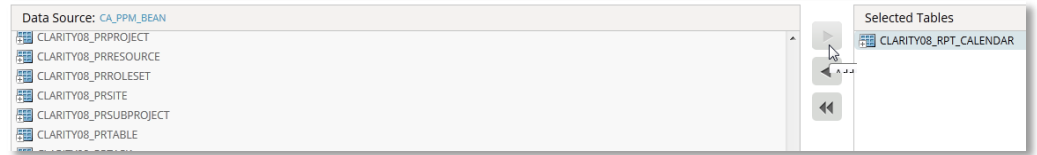


5. In the Data Source field, choose the CA PPM BEAN.
6. Click Create with Domain Designer.
7. Select your database schema from the list (the names are supplied by CA Support). In this example, CLARITY08 is the CA PPM schema.



8. Click OK.
The data model is visible in the Data Source pane.

9. Choose the RPT_CALENDAR table and move it to the Selected Tables pane.



10. Go to the Display tab.
11. Highlight the table and move it to the Sets and Items pane.



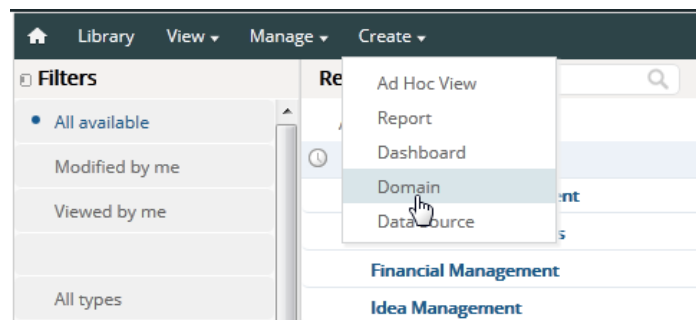
12. Click OK.
13. Click Submit.

This Domain is now completed and will be used for looking at the CA PPM data.

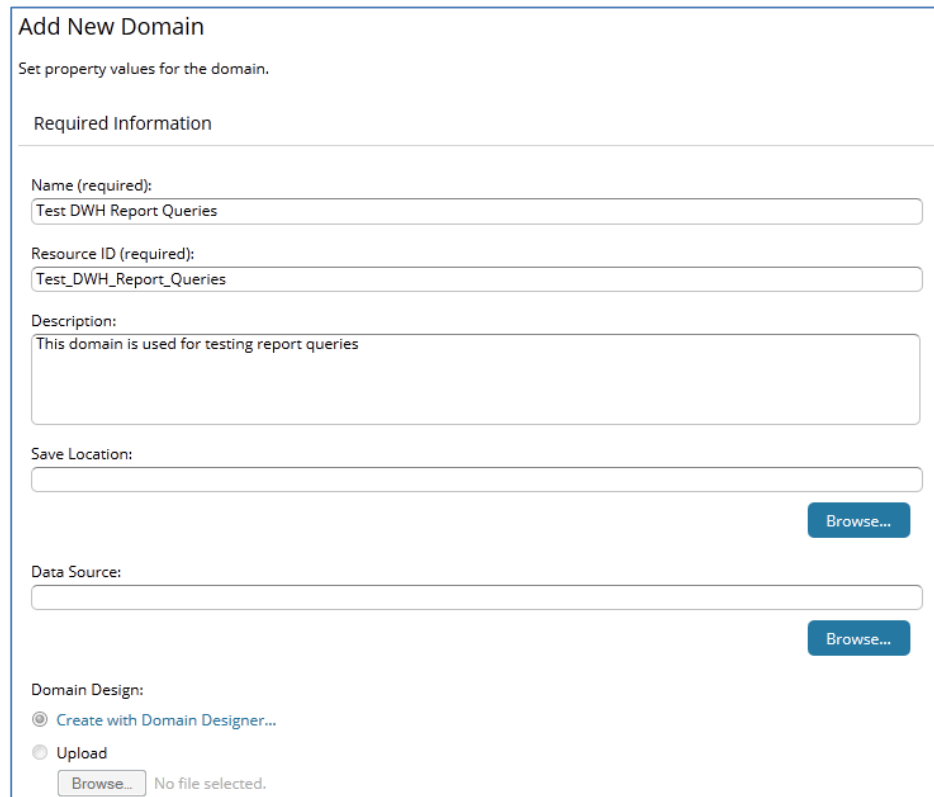
Create Domain for Testing Data Warehouse Report Queries

Follow these steps:

1. Determine if a domain called Test DWH Report Queries exists.
2. If the domain does not exist, create a new domain.

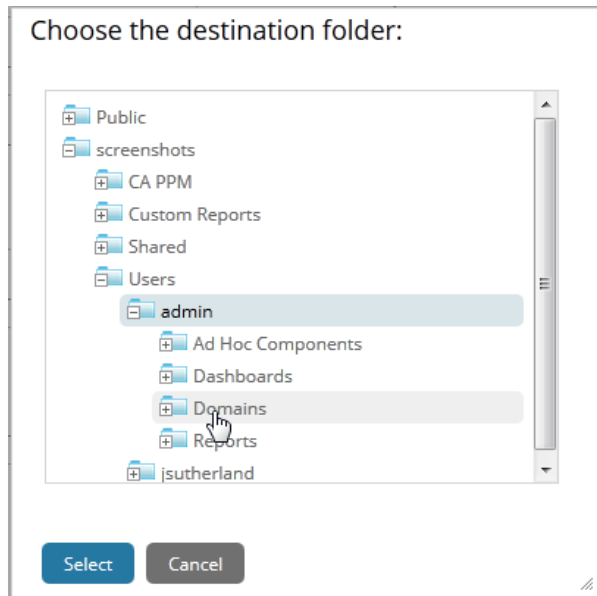


3. Enter the name Test DWH Report Queries.



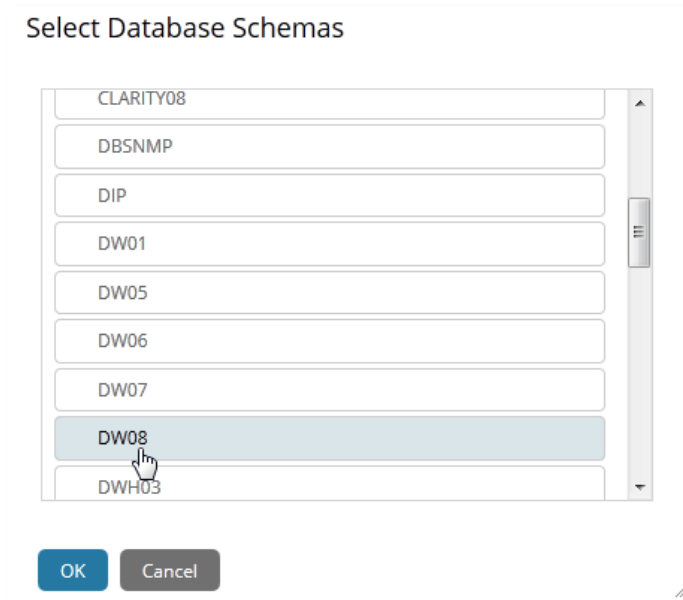
The 'Add New Domain' dialog box is shown. It has a title bar 'Add New Domain' and a subtitle 'Set property values for the domain.' Below this is a section 'Required Information'. It contains three text input fields: 'Name (required):' with the value 'Test DWH Report Queries', 'Resource ID (required):' with the value 'Test_DWH_Report_Queries', and 'Description:' with the value 'This domain is used for testing report queries'. Below these is a 'Save Location:' text input field and a 'Browse...' button. Below that is a 'Data Source:' text input field and another 'Browse...' button. At the bottom is a 'Domain Design:' section with two radio buttons: 'Create with Domain Designer...' (which is selected) and 'Upload'. Below the 'Upload' radio button is a 'Browse...' button and the text 'No file selected.'

4. In the Save Location field, choose the Domains directory that you created earlier under your user directory.

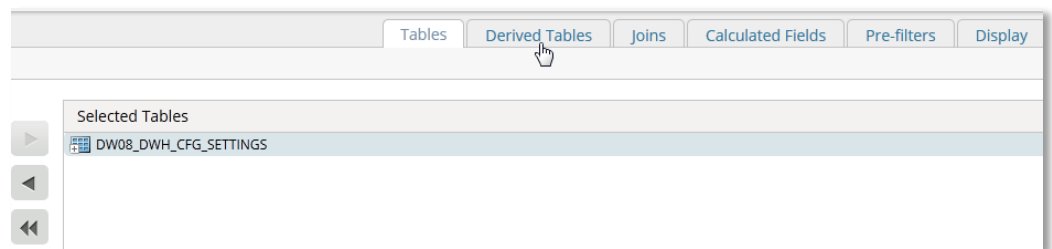


5. In the Data Source field, choose the CA PPM DWH BEAN.
6. Click Create with Domain Designer.

7. Select your database schema from the list (the names are supplied by CA Support).
In this example, DW08 is the data warehouse schema.



8. Click OK.
9. Click the Derived Tables tab.



10. Name the derived table DWHQueryTest.
11. Choose the Data Source CA_PPM_DWH_BEAN.

12. Type the following query:

```
SELECT investment_key FROM dwh_inv_investment
```

Derived Table

Query ID (required):
DWHQueryTest

Data Source:
CA_PPM_DWH_BEAN

Query (required):
SELECT investment_key FROM dwh_inv_investment

Hint: select * from [table]

Run Query

Select at least one field from the query result.

INVESTMENT_KEY

Hint: Use the SHIFT or CTRL keys (Mac:CMD) to multi-select the fields.

This simply is a placeholder that you replace with your own report query for testing.

13. Click Run Query, and if it is successful, the column names display (as in the previous graphic).

14. Click Save Table and then click the Display tab.

15. Move the DWHQueryTest to the Sets and Items pane.

Tables Derived Tables Joins Calculated Fields Pre-filters Display

Sets and Items

DWHQueryTest

Properties

Identification
Label: DWHQueryTest
ID: DWHQueryTest
Description: DWHQueryTest

16. Click OK in the lower left corner.

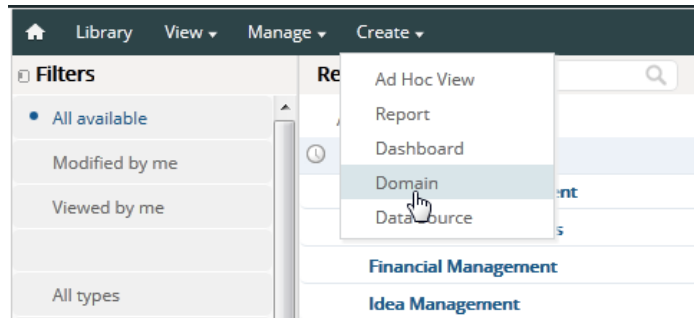
17. Click Submit in the lower left corner.

You have now created a domain for testing DWH queries.

Create Domain for Testing CA PPM Report Queries

Follow these steps:

1. Determine if a domain called Test PPM Report Queries exists.
2. If the domain does not exist, create a new domain.



3. Enter the name Test PPM Report Queries.

Add New Domain

Set property values for the domain.

Required Information

Name (required):

Resource ID (required):

Description:

Save Location:

[Browse...](#)

Data Source:

[Browse...](#)

Domain Design:

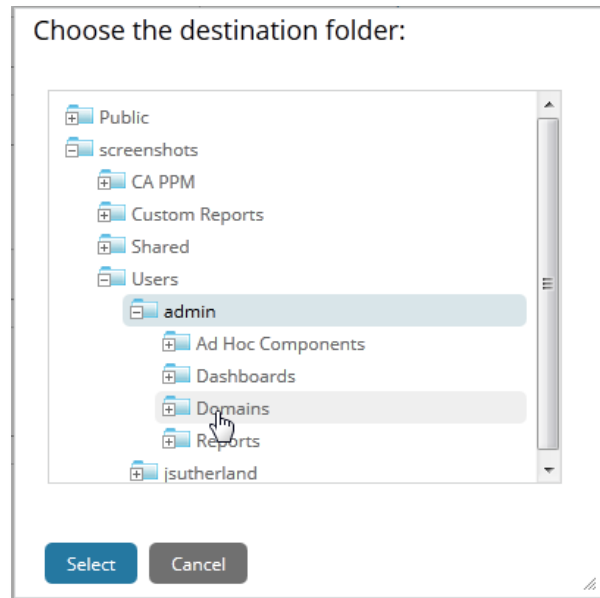
☒ Create with Domain Designer...

☐ Upload

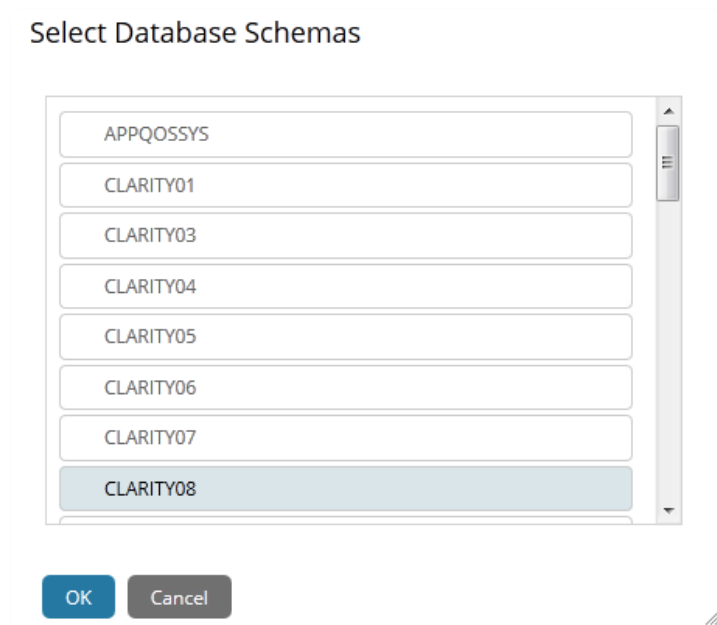
[Browse...](#)

No file selected.

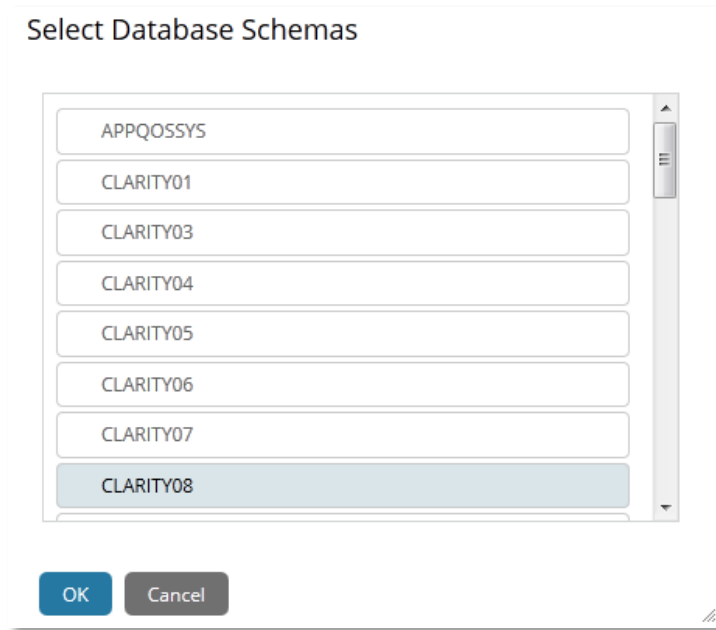
4. In the Save Location field, choose the Domains directory that you created earlier under your user directory.



5. In the Data Source field, choose the CA PPM BEAN.
6. Click Create with Domain Designer.
7. Select your database schema from the list (the names are supplied by CA Support). In this example, CLARITY08 is the CA PPM schema.



8. In the Data Source field, choose the CA PPM BEAN.
9. Click Create with Domain Designer.
10. Select your database schema from the list (the names are supplied by CA Support).
In this example, CLARITY08 is the CA PPM schema.



11. Click OK and click the Derived Tables tab.
12. Name the derived table PPMQueryTest.
13. Choose the Data Source CA_PPM_BEAN.

14. Type the following query:

```
SELECT id FROM inv_investments
```

Derived Table

Query ID (required):
PPMQueryTest

Data Source:
CA_PPM_BEAN

Query (required):
SELECT id FROM inv_investments

Hint: select * from [table]

Run Query

Select at least one field from the query result.

ID

Hint: Use the SHIFT or CTRL keys (Mac:CMD) to multi-select the fields.

This simply is a placeholder that you replace with your own report query for testing.

15. Click Run Query, and if it is successful, the column names display (as in the previous graphic).
16. Click Save Table and then click the Display tab.
17. Move the PPMQueryTest to the Sets and Items pane.

Resources

View as: [Join Tree](#) | Table List

	PPMQueryTest
--	--------------

18. Click OK in the lower left corner.
19. Click Submit in the lower left corner.

You have created a domain for testing CA PPM queries. Now you have your testing domains set up.

Developing the Report Query

Example Report Information

A report is needed that shows Investment ID, Investment Name, Investment Manager, Investment Status, and Estimate at Completion Hours. The report should be filtered by Investment Manager (optional multi-select), Investment Name (optional multi-select), and Include Inactive Investments (checkbox). The report should only show investments that the user has permissions to see.

Note: The `_key` values are used whenever possible for filtering because of indexing.

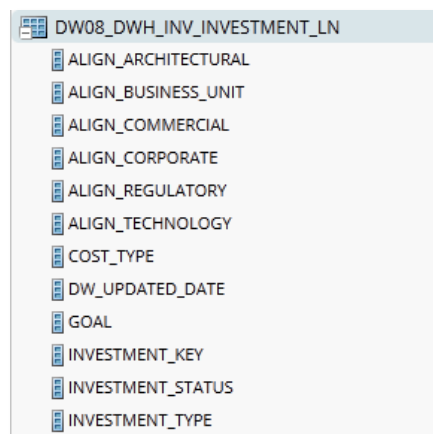
Find Fields in the Data Warehouse

Follow these steps:

1. In CA PPM, click Advanced Reporting.
2. Click View List in the Domains box.
3. Right-click the View DWH Data domain and Edit.
4. Click Edit with Domain Designer.
5. Expand the different tables to see the columns:
 - `Investment_key`, `Investment_id`, `Investment_name`, `investment_manager`, and `investment_manager_key` can be found in the `dwh_inv_investment` table.
 - `Investment_status` can be found in the `dwh_inv_investment_ln` table.

Note: “`_ln`” on the end of a table name means that the values in the table are language specific and must therefore be filtered by `language_code` if you are using more than one language in the data warehouse.

The following example applies to `dwh_inv_investment_ln`.

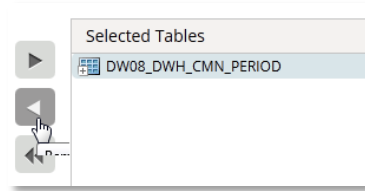


The `eac_total_hours` can be found in the `dwh_inv_summary_facts` table.

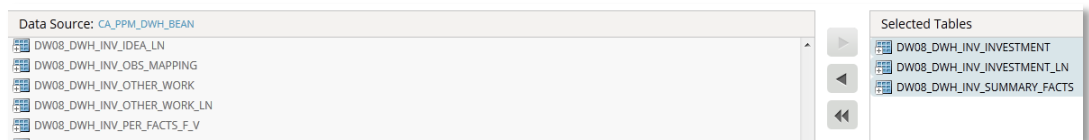
View Data in the Tables for Your Report

Follow these steps:

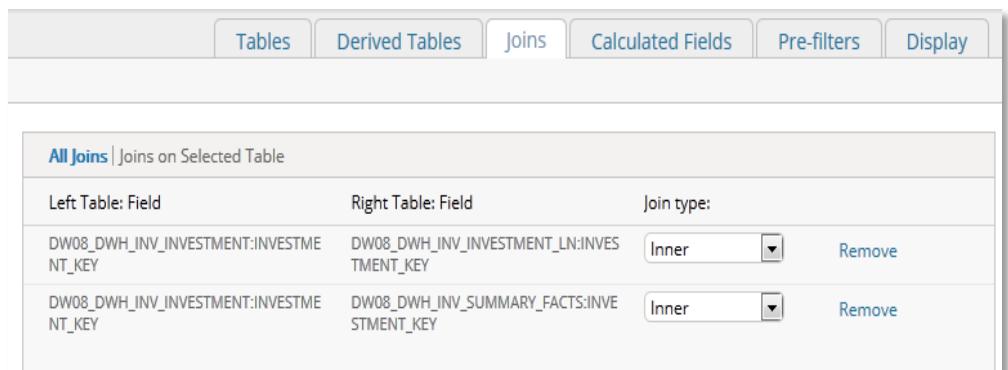
1. Highlight any Selected Tables and move them back out of the Selected Tables pane.



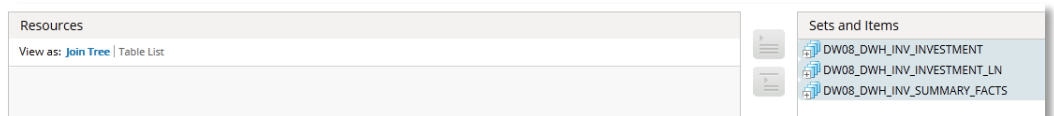
2. Choose the table with the data that you want to see and move it to the Selected Tables pane. You can also move more than one table over, but you will then need to go to the Joins tab and create joins between the tables.



In this case, three tables are chosen so Joins must be set up as shown below.

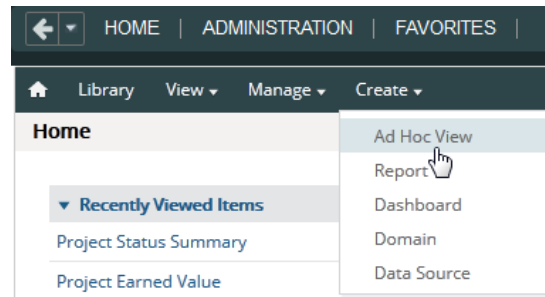


3. Go to the Display tab.
4. Remove any items in the Sets and Items pane.
5. Move the three tables to the Sets and Items pane.



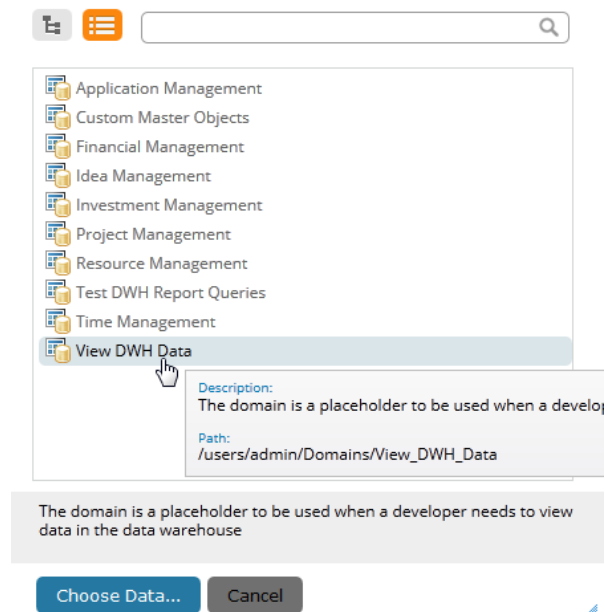
6. Click OK and then Submit.

7. Go to home and create an ad hoc view.



8. Choose the domain View DWH Data.

Select Data

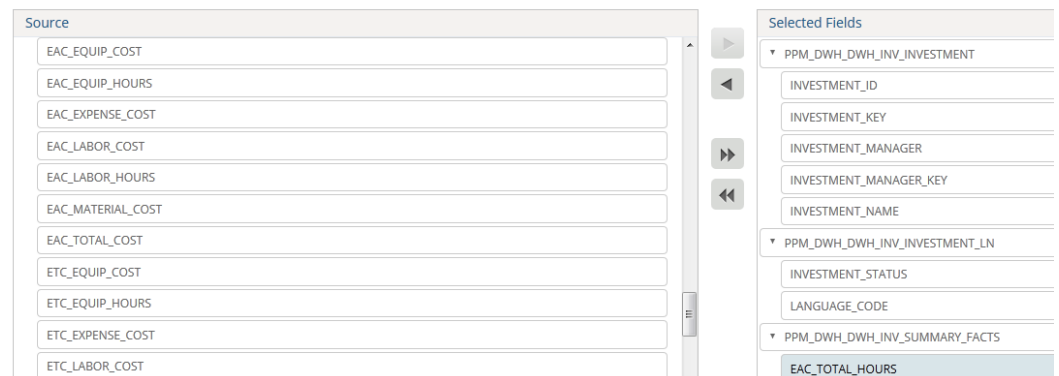


9. Click Choose Data.

10. Move your fields to the Selected Fields.

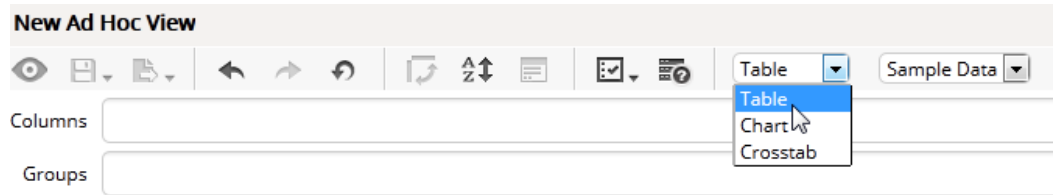
Choose Data

To move items in or out of selected fields, double-click them, drag them, or use the direction buttons.



11. Click OK in the lower left corner.

12. Choose Table in the dropdown on the Icon bar.



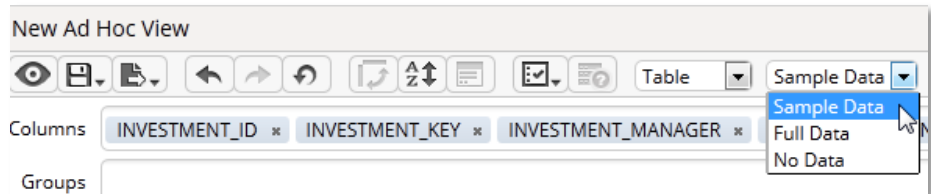
13. Drag your fields on to the display pane and you see data.

Note: Fields defined as numbers may appear under Measures. If the field is not a measure, simply right-click the field and choose Use as Field.

The screenshot shows the 'New Ad Hoc View' window with a data table. The table has the following columns: INVESTMENT_ID, INVESTMENT_KEY, INVESTMENT_MANAGER, INVESTMENT_MANAGER_KEY, INVESTMENT_NAME, INVESTMENT_STATUS, LANGUAGE_CODE, and EAC_TOTAL_HOURS. The table contains 17 rows of data.

INVESTMENT_ID	INVESTMENT_KEY	INVESTMENT_MANAGER	INVESTMENT_MANAGER_KEY	INVESTMENT_NAME	INVESTMENT_STATUS	LANGUAGE_CODE	EAC_TOTAL_HOURS
AS1010	5,001,011.00	Perez, Carlos	5,002,005.00	API Research and Development Center	Approved	en	8,336.00
AS1004	5,001,012.00	Newburg, Mary	5,002,059.00	API Technology Center	Approved	en	0.00
AS1002	5,001,013.00	Lewis, Paul	5,002,047.00	BEA Weblogic 10.0 Application Server	Approved	en	4,168.00
AS1024	5,001,014.00	Miller, Veronica	5,002,008.00	BrightStor HSM Hierarchical Storage Manager	Approved	en	0.00
AS1016	5,001,015.00	Lewis, Paul	5,002,047.00	CA Wily Introscope	Approved	en	0.00
AS1030	5,001,016.00	Lewis, Paul	5,002,047.00	CA Wily Portal Manager	Approved	en	4,184.00
AS1023	5,001,024.00	Stewart, Diane	5,002,031.00	HP 1500cs Modular Smart Array - 48TB	Approved	en	12,504.00
AS1012	5,001,025.00	Perez, Carlos	5,002,005.00	LATAM Data Center	Approved	en	4,184.00
AS1017	5,001,026.00	Newburg, Mary	5,002,059.00	LATAM Research and Development Center	Approved	en	12,552.00
AS1022	5,001,027.00	Perez, Carlos	5,002,005.00	LATAM Technology Center	Approved	en	4,176.00
AS1015	5,001,028.00	Lewis, Paul	5,002,047.00	Microsoft SQL Server 2008 Standard Edition	Unapproved	en	12,528.00
csk.infrastructure	5,000,000.00	Martin, Paul	5,002,045.00	Infrastructure Deployment Template	Unapproved	en	784.00
csk.appCOTS	5,000,001.00	Martin, Paul	5,002,045.00	Application COTS Template	Unapproved	en	328.00
AS1021	5,001,029.00	Miller, Veronica	5,002,008.00	MS Exchange 2010	Approved	en	12,552.00
AS1007	5,001,030.00	Newburg, Mary	5,002,059.00	NA Data Center	Approved	en	12,528.00

Another important drop-down specifies whether you want to show Sample, Full, or No Data. This can be important if you are viewing large tables.



You can now save the data and the ad hoc view if you want. This is just a way to view data in order to help determine how to write the query.

Write Query with No Dynamic Filtering

You should now have enough information to write the following query. You should use a simple text editor tool to write your query.

```

SELECT i.investment_key,
       i.investment_id,
       i.investment_name,
       i.investment_manager_key,
       i.investment_manager,
       ilang.investment_status,
       isf.eac_total_hours
FROM   dwh_inv_investment i
       INNER JOIN dwh_inv_investment_ln ilang ON i.investment_key = ilang.investment_key
       INNER JOIN dwh_inv_summary_facts isf ON i.investment_key = isf.investment_key
ORDER BY i.investment_manager, i.investment_manager_key

```

Create Derived Table with the Query

Follow these steps:

1. Go to home, Domains, and View List.
2. Right-click Test DWH Report Queries and Edit.
3. Click Edit with Domain Designer.

Edit Domain
Edit property values for the domain.

Required Information

Name (required):
Test DWH Report Queries

Resource ID (read-only):
Test_DWH_Report_Queries

Description:
This domain is used for testing report queries

Save Location:
/users/admin/Domains Browse...

Data Source:
/ca_ppm/data_sources/CA_PPM_DWH_BEAN Browse...

Domain Design:
☒ Edit with Domain Designer...
☐ Upload Browse... No file selected.

4. Click the Derived Tables tab.
5. Click your dummy derived table DWHQueryTest and replace the query with the new one.

6. Click Run Query.

Derived Table

Query ID (required):

DWHQueryTest

Data Source:

CA_PPM_DWH_BEAN

Query (required):

```
i.investment_manager,  
ilang.investment_status,  
isf.eac_total_hours  
FROM   dwl_inv_investment i  
INNER JOIN dwl_inv_investment_in ilang ON i.investment_key = ilang.investment_key  
INNER JOIN dwl_inv_summary_facts isf ON i.investment_key = isf.investment_key
```

Hint: select * from [table]

Run Query

Select at least one field from the query result.

INVESTMENT_KEY

INVESTMENT_ID

INVESTMENT_NAME

INVESTMENT_MANAGER_KEY

INVESTMENT_MANAGER

Hint: Use the SHIFT or CTRL keys (Mac:CMD) to multi-select the fields.

Save Table

Cancel

Once you Run Query, make sure you highlight all the fields and click Save Table.

Run Query

Select at least one field from the query result.

INVESTMENT_KEY

INVESTMENT_ID

INVESTMENT_NAME

INVESTMENT_MANAGER_KEY

INVESTMENT_MANAGER

Hint: Use the SHIFT or CTRL keys (Mac:CMD) to multi-select the fields.

Save Table

Cancel

- Click the Display tab and delete DWHQueryTest from Sets and Items.
- Next, highlight the derived table and move it back over to the Sets and Items pane.
- Click OK and then Submit.

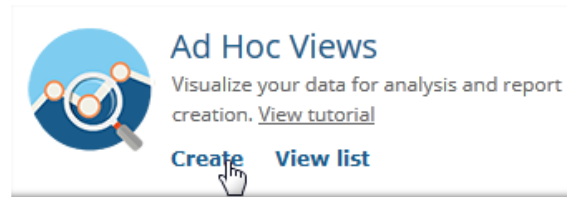
You are now ready to write the report

Important! Filtering will be added later. If you have a lot of data, you can add a hard-coded filter to the query, for example, “WHERE i.investment_manager_key IN (1,2,3)”. You could view the data in the “View the Data in the Tables Needed for Your Report” section to find the valid investment_manager_key.

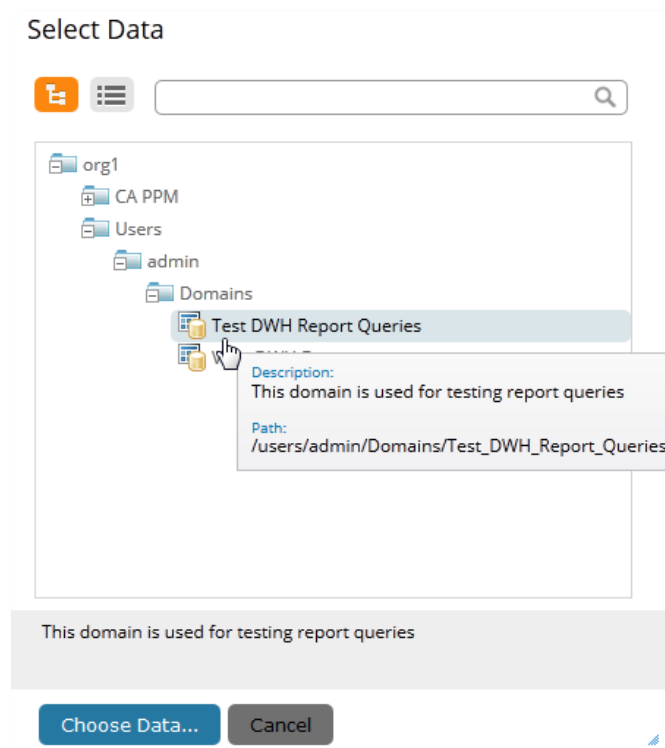
View Report Query Data

Follow these steps:

1. Click the Home icon and then click Create in the Ad Hoc Views box.



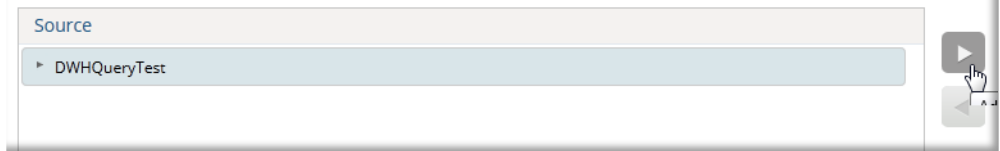
2. Click Domains for the Data Chooser: Source.
3. Go to your domain directory and choose your domain.



4. Click Choose Data.
5. Highlight your Source and move it to the Selected Fields pane.

Choose Data

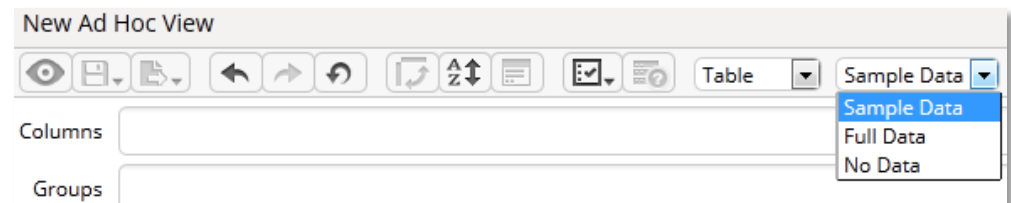
To move items in or out of selected fields, double-click them, drag them, or use the direction buttons.



6. Click OK in the lower left corner.
7. Drag your source into the New Ad Hoc View and your data will appear.

INVESTMENT_ID	INVESTMENT_MANAGER	INVESTMENT_NAME	INVESTMENT_STATUS	EAC_TOTAL_HOURS
AS1010	Perez, Carlos	API Research and Development Center	Approved	8,336.00
AS1004	Newburg, Mary	API Technology Center	Approved	0.00
AS1002	Lewis, Paul	BEA Weblogic 10.0 Application Server	Approved	4,168.00
AS1024	Miller, Veronica	BrightStor HSM Hierarchical Storage Manager	Approved	0.00
AS1016	Lewis, Paul	CA Wily Introscope	Approved	0.00
AS1030	Lewis, Paul	CA Wily Portal Manager	Approved	4,184.00
AS1023	Stewart, Diane	HP 1500cs Modular Smart Array - 48TB	Approved	12,504.00
AS1012	Perez, Carlos	LATAM Data Center	Approved	4,184.00
AS1017	Newburg, Mary	LATAM Research and Development Center	Approved	12,552.00
AS1022	Perez, Carlos	LATAM Technology Center	Approved	4,176.00
AS1015	Lewis, Paul	Microsoft SQL Server 2008 Standard Edition	Unapproved	12,528.00
csk.infrastructure	Martin, Paul	Infrastructure Deployment Template	Unapproved	784.00
csk.appCOTS	Martin, Paul	Application COTS Template	Unapproved	328.00
AS1021	Miller, Veronica	MS Exchange 2010	Approved	12,552.00
AS1007	Newburg, Mary	NA Data Center	Approved	12,528.00

Note: The data display options appear at the top. If your query returns a large result set, you can limit it using the Sample Data option.



When you are satisfied with the result set, you can exit without saving the Ad Hoc query.

Chapter 4: Jaspersoft Studio Professional

Installing Jaspersoft Studio Professional

Install Jaspersoft Studio Professional 6.1.0. Once installed, proceed with the following sections to configure the environment.

Create JasperReports Server Connection

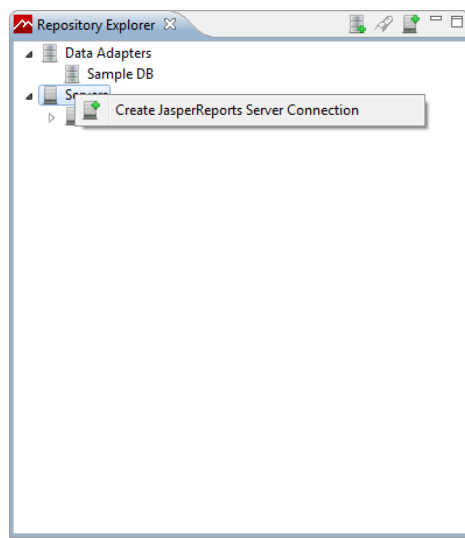
The following information is required:

- Advanced Reporting Server URL (supplied by CA Support)
- Organization ID (supplied by CA Support)
- Jaspersoft Studio report development user and password

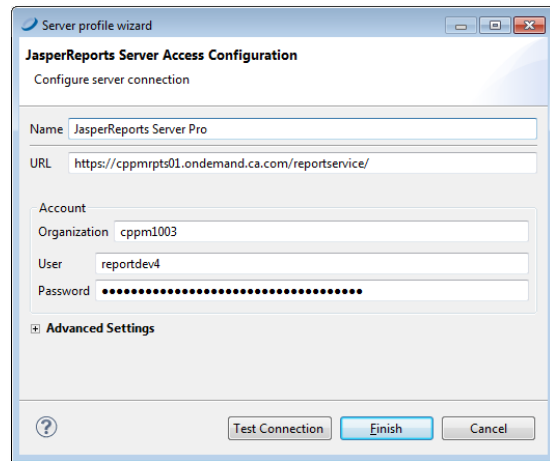
Launch Jaspersoft Studio Professional

Follow these steps:

1. In the Repository Explorer, right-click Servers and select Create JasperReports Server Connection.



2. Enter the JasperReports Server URL (Advanced Reporting Server URL).
3. Enter the Jaspersoft Server information using the new report development user name (with necessary privileges) and password.



4. Click Test Connection to insure that the server is responding and Click Finish.

Important! If unsuccessful, expand Advanced Setting and check the box Use SOAP Protocol Only and click Test Connection.

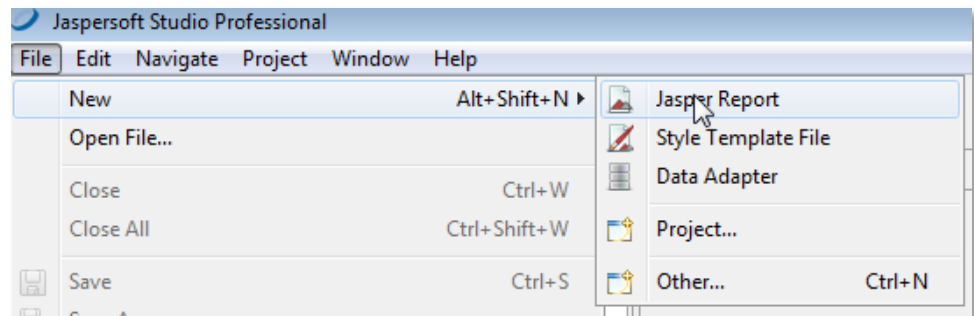
Chapter 5: Creating a Jaspersoft Report

Create Report Using the Domain

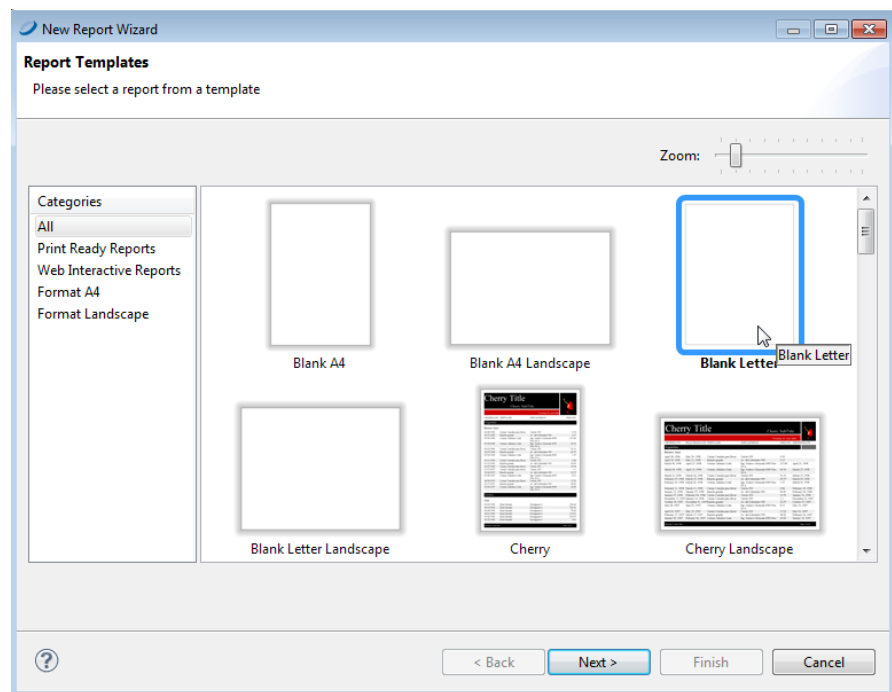
Since there is no direct connection to the database, domains are used when creating reports and then converted to straight SQL, if needed, later.

Follow these steps:

1. Open Jaspersoft Studio and select File, New, Jasper Report.

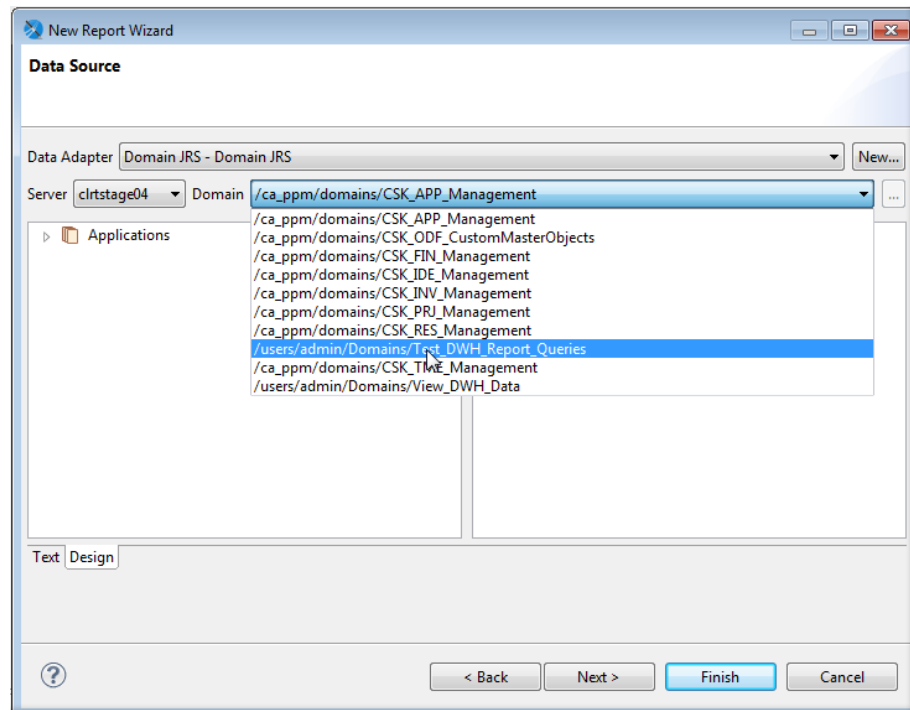


A list of report templates appears. For this exercise, choose Blank Letter.

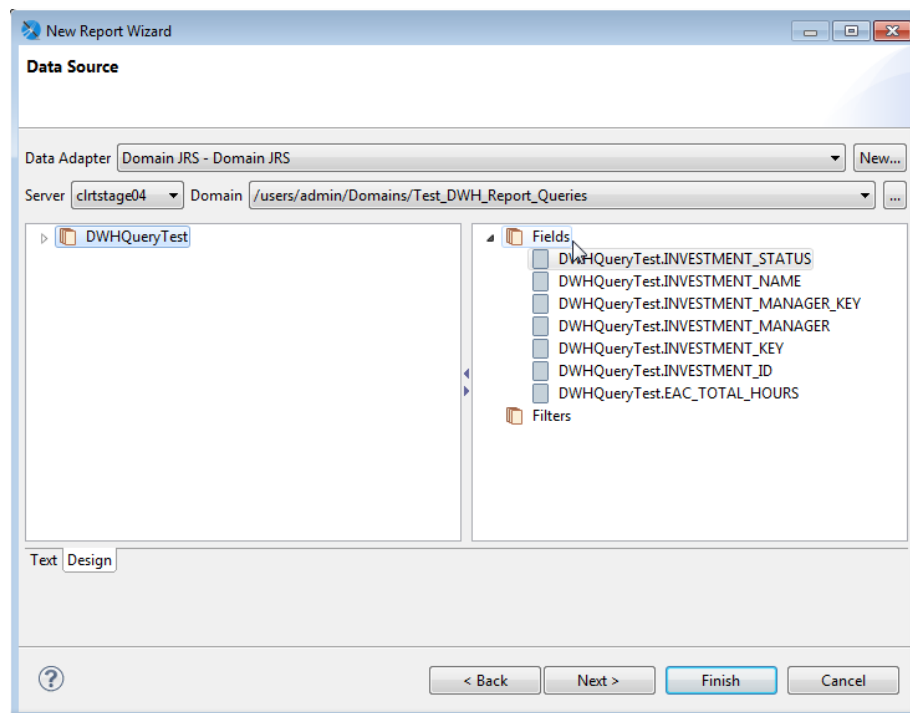


2. Click Next and name your report (no spaces in name). For this exercise, use Investment_Hours_Listing.jrxml.
3. Click Next and, in the Data Adapter field, choose Domain JRS.

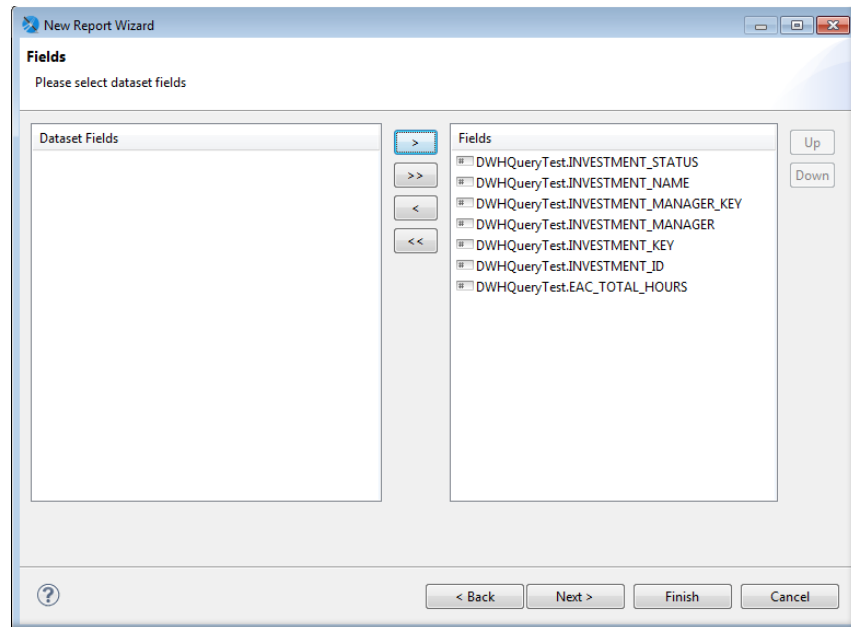
4. Choose your server and in the Domain field, choose your domain.



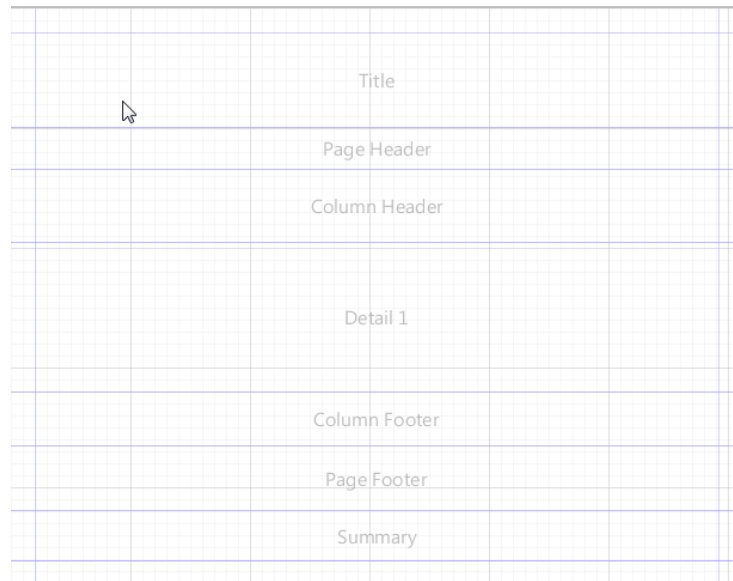
5. Drag DWHQueryTest into Fields.



6. Click Next and choose all the fields.



7. Click Next and then Next again for the Group By.
8. Click Finish.
9. Right-click in the Main Report pane and Create Group.
10. Choose INVESTMENT_MANAGER_KEY and Finish.



Group bands have now been added to the layout.

11. Drag your fields on to the pane and design your report.

The screenshot shows the JasperReports design tool interface. The report title is "Investment Hours Listing". The design area contains a table with four columns: "Investment ID", "Investment Name", "Status", and "EAC Hours". The table is currently empty, with placeholder text like "\$F{DWHQueryTest.INVESTMENT_MANAGER}" and "\$F{DWHQueryTest.INVESTMENT_NAME}" visible. The design tool also shows a "Group1" structure with a "Group Header 1" and a "Group Footer 1". Other elements like "Column Footer", "Page Footer", and "Summary" are also visible in the design area.

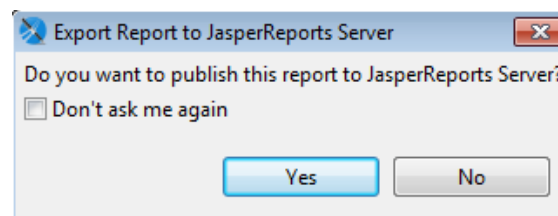
12. Click the Preview tab and view your data.

The screenshot shows the JasperReports Preview tab. The report title is "Investment Hours Listing". The table displays the following data:

Investment ID	Investment Name	Status	EAC Hours
Administrator, Niku			
OW1001	Personal Leave	Approved	0
1	Denise Project 1	Approved	34698
OW1002	Holiday	Approved	0
OW1003	Vacation Time	Approved	0
Berks, Paul			
PR1009	Credit Card Processing Enhancement	Unapproved	9090
PR1019	Financial Workflow Development	Approved	0
PR1022	Email SAN Storage Implementation	Approved	1000
PR1012	Order Trending Analysis	Unapproved	1600
PR1016	Automated Security Enhancements	Unapproved	1600
PR1040	Executive Dashboard Visibility	Approved	1600
Childers, Valerie			
AP1001	Fixed Assets	Approved	836.8
Granger, Paula			
PG1000	Online Web Portal Program	Approved	0

13. Save your report. (Click No for publishing to JasperReports Server)

Note: Going forward, whenever this prompt comes up, Click No.



Insert CA PPM Required Parameters

Follow these steps:

1. Go to the Source tab and replace the existing parameters with the parameters (that are required from PPM) in the following code example:

```
<parameter name="LoggedInUser" class="com.jaspersoft.jasperserver.api.metadata.user.domain.User" isForPrompting="false">
<parameterDescription><![CDATA[Logged In User]]></parameterDescription>
</parameter>
<parameter name="ppmUser" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[User Name - Change "admin" to ${LoggedInUser}.getUsername()]]></parameterDescription>
<defaultValueExpression><![CDATA["admin"]]></defaultValueExpression>
</parameter>
<parameter name="LoggedInUserAttribute_ppmUserUITheme" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[UI Theme Profile Attribute]]></parameterDescription>
</parameter>
<parameter name="ppmUserUITheme" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[UI Theme - Change "ca_ppm_default" to
${LoggedInUserAttribute_ppmUserUITheme}]]></parameterDescription>
<defaultValueExpression><![CDATA["ca_ppm_default"]]></defaultValueExpression>
</parameter>
<parameter name="LoggedInUserAttribute_ppmUserLanguage" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[User Language Profile Attribute]]></parameterDescription>
</parameter>
<parameter name="ppmUserLanguage" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[User Language - Change "en" to
${LoggedInUserAttribute_ppmUserLanguage}]]></parameterDescription>
<defaultValueExpression><![CDATA["en"]]></defaultValueExpression>
</parameter>
<parameter name="LoggedInUserAttribute_dwhDBSchema" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[Data warehouse DB Schema Profile Attribute]]></parameterDescription>
</parameter>
<parameter name="dwhDBSchema" class="java.lang.String" isForPrompting="false">
<parameterDescription><![CDATA[Data warehouse DB Schema - Change "ppm_dwh" to
${LoggedInUserAttribute_dwhDBSchema}]]></parameterDescription>
<defaultValueExpression><![CDATA["ppm_dwh"]]></defaultValueExpression>
</parameter>
```

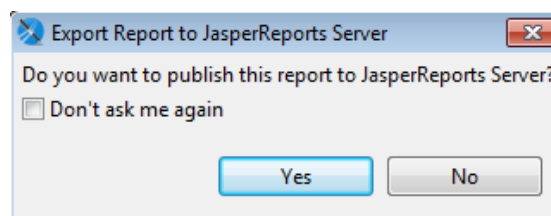
Before:

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <!-- Created with Jaspersoft Studio version 6.1.0.final using JasperReports Library version 6.1.0 -->
3 <!-- 2015-09-15T16:13:15 -->
4 <jasperReport xmlns="http://jasperreports.sourceforge.net/jasperreports" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
5   <property name="ireport.jasperserver.url" value="http://clrtstage04:8081/reportservice/" />
6   <property name="ireport.jasperserver.user" value="bryan|org1" />
7   <property name="ireport.domainUri" value="/users/admin/Domains/Test_DWH_Report_Queries" />
8   <property name="com.jaspersoft.studio.data.defaultdataadapter" value="Domain JRS" />
9   <parameter name="LoggedInUser" class="com.jaspersoft.jasperserver.api.metadata.user.domain.User" isForPrompting="false">
10    <parameter name="LoggedInUsername" class="java.lang.String" isForPrompting="false">
11      <queryString language="domain">
12        <![CDATA[<query>
13          <queryFields>
14            <queryField id="DWHQueryTest.INVESTMENT_STATUS"/>
15            <queryField id="DWHQueryTest.INVESTMENT_NAME"/>
16            <queryField id="DWHQueryTest.INVESTMENT_MANAGER_KEY"/>
17            <queryField id="DWHQueryTest.INVESTMENT_MANAGER"/>
18            <queryField id="DWHQueryTest.INVESTMENT_KEY"/>
19            <queryField id="DWHQueryTest.INVESTMENT_ID"/>
20            <queryField id="DWHQueryTest.EAC_TOTAL_HOURS"/>
21          </queryFields>
22        </query>]]>
23      </queryString>
```

After:

```
1 <?xml version="1.0" encoding="UTF-8"?>
2 <!-- Created with Jaspersoft Studio version 5.6.1.final using JasperReports Library version 5.6.1 -->
3 <!-- 2015-06-12T09:37:34 -->
4 <jasperReport xmlns="http://jasperreports.sourceforge.net/jasperreports" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schema
5   <property name="ireport.jasperserver.url" value="http://jaspercps08.ca.com/reportservice/" />
6   <property name="ireport.domainUri" value="/users/admin/Domains/Test_DWH_Report_Queries" />
7   <property name="com.jaspersoft.studio.data.defaultdataadapter" value="Domain JRS" />
8   <parameter name="LoggedInUser" class="com.jaspersoft.jasperserver.api.metadata.user.domain.User" isForPrompting="false">
9     <parameterDescription><![CDATA[Logged In User]]></parameterDescription>
10   </parameter>
11   <parameter name="ppmUser" class="java.lang.String" isForPrompting="false">
12     <parameterDescription><![CDATA[User Name - Change "admin" to ${LoggedInUser.getUsername()}]]></parameterDescription>
13     <defaultValueExpression><![CDATA["admin"]]></defaultValueExpression>
14   </parameter>
15   <parameter name="LoggedInUserAttribute_ppmUserUITheme" class="java.lang.String" isForPrompting="false">
16     <parameterDescription><![CDATA[UI Theme Profile Attribute]]></parameterDescription>
17   </parameter>
18   <parameter name="ppmUserUITheme" class="java.lang.String" isForPrompting="false">
19     <parameterDescription><![CDATA[UI Theme - Change "ca_ppm_default" to ${LoggedInUserAttribute_ppmUserUITheme}]]></parameterDescri
20     <defaultValueExpression><![CDATA["ca_ppm_default"]]></defaultValueExpression>
21   </parameter>
22   <parameter name="LoggedInUserAttribute_ppmUserLanguage" class="java.lang.String" isForPrompting="false">
23     <parameterDescription><![CDATA[User Language Profile Attribute]]></parameterDescription>
24   </parameter>
25   <parameter name="ppmUserLanguage" class="java.lang.String" isForPrompting="false">
26     <parameterDescription><![CDATA[User Language - Change "en" to ${LoggedInUserAttribute_ppmUserLanguage}]]></parameterDescription>
27     <defaultValueExpression><![CDATA["en"]]></defaultValueExpression>
28   </parameter>
29   <parameter name="LoggedInUserAttribute_dwhDBSchema" class="java.lang.String" isForPrompting="false">
30     <parameterDescription><![CDATA[Data Warehouse DB Schema Profile Attribute]]></parameterDescription>
31   </parameter>
32   <parameter name="dwhDBSchema" class="java.lang.String" isForPrompting="false">
33     <parameterDescription><![CDATA[Data Warehouse DB Schema - Change "ppm_dwh" to ${LoggedInUserAttribute_dwhDBSchema}]]></parameter
34     <defaultValueExpression><![CDATA["ppm_dwh"]]></defaultValueExpression>
35   </parameter>
36   <queryString language="domain">
37     <![CDATA[<query>
38       <queryFields>
39         <queryField id="DWHQueryTest.INVESTMENT_STATUS"/>
40         <queryField id="DWHQueryTest.INVESTMENT_NAME"/>
41         <queryField id="DWHQueryTest.INVESTMENT_MANAGER_KEY"/>
42         <queryField id="DWHQueryTest.INVESTMENT_MANAGER"/>
43         <queryField id="DWHQueryTest.INVESTMENT_KEY"/>
44         <queryField id="DWHQueryTest.INVESTMENT_ID"/>
45         <queryField id="DWHQueryTest.EAC_TOTAL_HOURS"/>
46       </queryFields>
```

2. Remove line #6. (<property name="ireport.jasperserver.user"...))
3. Save your report. (Click No for publishing to JasperReports Server)



Add Report Parameters to Your Query

Follow these steps:

1. Go to the domain and copy your SQL.
2. Add parameters to your SQL, as shown in the following code example:

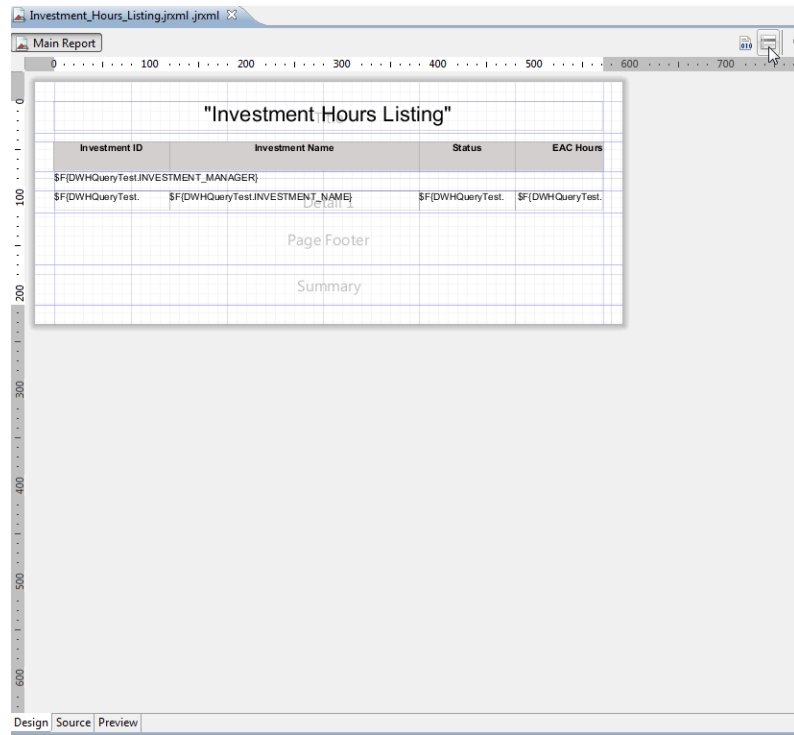
```
SELECT i.investment_key,
       i.investment_id,
       i.investment_name,
       i.investment_manager_key,
       i.investment_manager,
       ilang.investment_status,
       isf.eac_total_hours
FROM   dwh_inv_investment i
       INNER JOIN dwh_inv_investment_ln ilang ON i.investment_key = ilang.investment_key
       INNER JOIN dwh_inv_summary_facts isf ON i.investment_key = isf.investment_key
WHERE  ilang.language_code = ${ppmUserLanguage}
AND    (i.is_active = CASE WHEN ${includeInactiveInvestments} = 1 THEN i.is_active ELSE 1 END)
AND    ${X{IN, i.investment_key, investmentKey_1}}
AND    ${X{IN, i.investment_manager_key, investmentManagerKey_1}}
AND    ((EXISTS (SELECT user_key
                  FROM   dwh_inv_security
                  WHERE  global_view_right = 1
                  AND    user_name = ${ppmUser}
                  AND    permission_key = 'ProjectViewManagement'))
OR
 (EXISTS (SELECT investment_key
          FROM   dwh_inv_security
          WHERE  investment_key = i.investment_key
          AND    user_name = ${ppmUser}))))
ORDER BY i.investment_manager, i.investment_manager_key
```

Note: The ppmUser parameter limits the data according to CA PPM Security. The ppmUserLanguage parameter needs to be added because the “_ln” table is used.

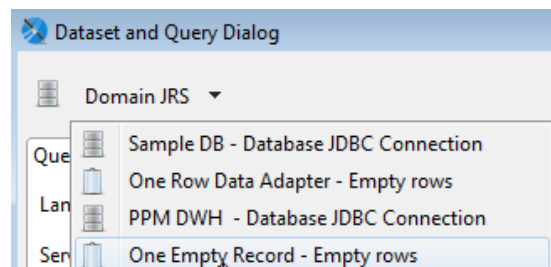
Replace the Query

Follow these steps:

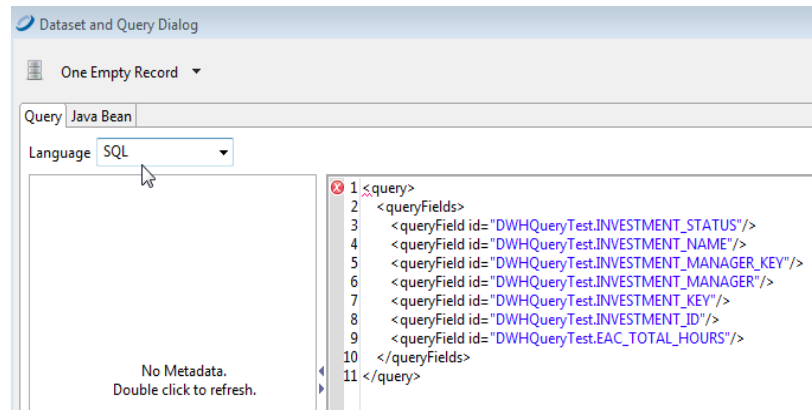
1. Go to the Design tab and click the Dataset and Query Dialog icon.



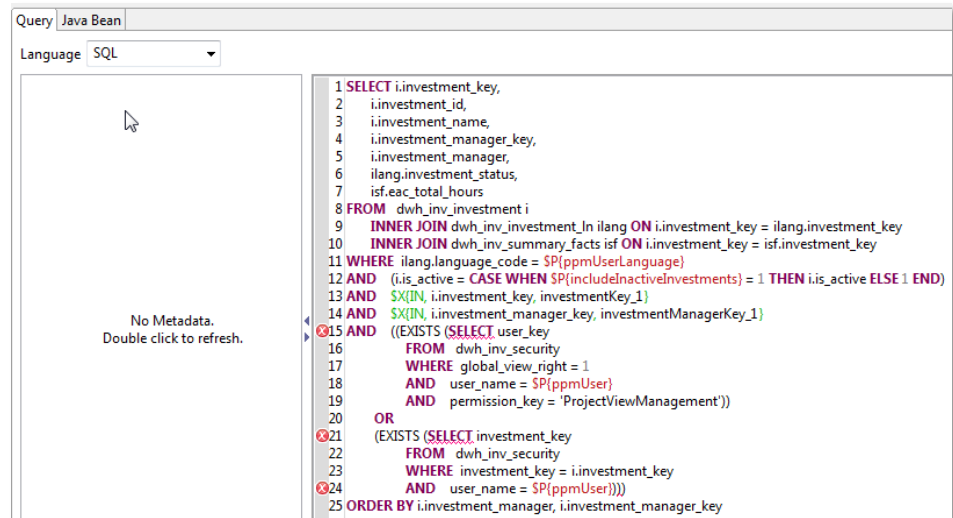
2. Change to One Empty Record.



3. Change the Language to SQL.



4. Paste your query into the query pane on the right.

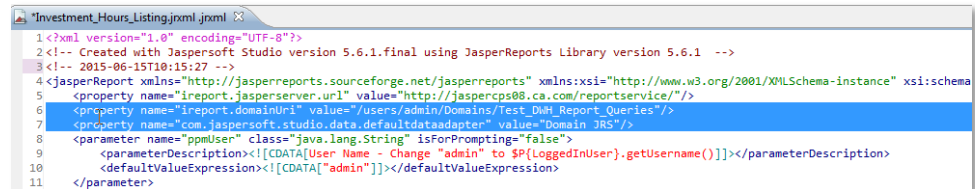


5. Click OK.

Replace Domain References

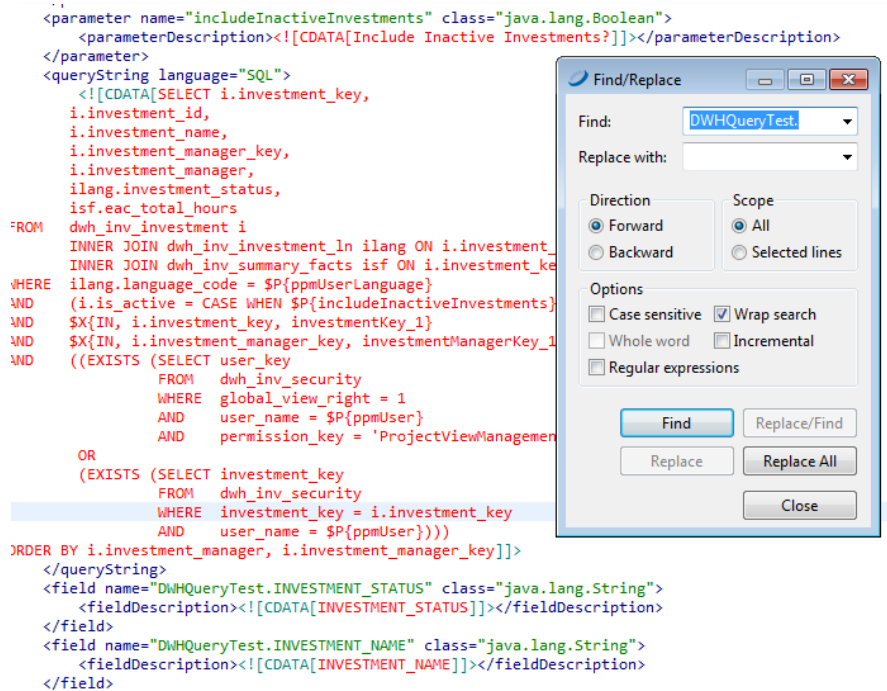
Follow these steps:

1. Go to the Source tab.
2. Remove the two property lines (highlighted in the following example) that reference the domain.



```
1<?xml version="1.0" encoding="UTF-8"?>
2<!-- Created with JasperSoft Studio version 5.6.1.final using JasperReports Library version 5.6.1 -->
3<!-- 2015-06-15T10:15:27 -->
4<jasperReport xmlns="http://jasperreports.sourceforge.net/jasperreports" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schema
5  <property name="ireport.jasperserver.url" value="http://jaspercps08.ca.com/reportservice/" />
6  <property name="ireport.domainUri" value="/users/admin/Domains/Test.DWH.Report.Queries"/>
7  <property name="com.jaspersoft.studio.data.defaultdataadapter" value="Domain JRS"/>
8  <parameter name="ppmUser" class="java.lang.String" isForPrompting="false">
9    <parameterDescription><![CDATA[User Name - Change "admin" to ${LoggedInUser}.getUsername()]]></parameterDescription>
10    <defaultValueExpression><![CDATA["admin"]]]></defaultValueExpression>
11  </parameter>
```

3. Select Edit, Find/Replace and remove references to “DWHQueryTest”.



```
<parameter name="includeInactiveInvestments" class="java.lang.Boolean">
  <parameterDescription><![CDATA[Include Inactive Investments?]]></parameterDescription>
</parameter>
<queryString language="SQL">
  <![CDATA[SELECT i.investment_key,
    i.investment_id,
    i.investment_name,
    i.investment_manager_key,
    i.investment_manager,
    ilang.investment_status,
    isf.eac_total_hours
FROM
  dwh_inv_investment i
  INNER JOIN dwh_inv_investment_ln ilang ON i.investment_
  INNER JOIN dwh_inv_summary_facts isf ON i.investment_ke
WHERE
  ilang.language_code = ${ppmUserLanguage}
  AND (i.is_active = CASE WHEN ${includeInactiveInvestments}
  AND ${IN, i.investment_key, investmentKey_1}
  AND ${XIN, i.investment_manager_key, investmentManagerKey_1}
  AND ((EXISTS (SELECT user_key
    FROM dwh_inv_security
    WHERE global_view_right = 1
    AND user_name = ${ppmUser}
    AND permission_key = 'ProjectViewManagement
    OR
    (EXISTS (SELECT investment_key
    FROM dwh_inv_security
    WHERE investment_key = i.investment_key
    AND user_name = ${ppmUser}))))
ORDER BY i.investment_manager, i.investment_manager_key]]>
</queryString>
<field name="DWHQueryTest.INVESTMENT_STATUS" class="java.lang.String">
  <fieldDescription><![CDATA[INVESTMENT_STATUS]]></fieldDescription>
</field>
<field name="DWHQueryTest.INVESTMENT_NAME" class="java.lang.String">
  <fieldDescription><![CDATA[INVESTMENT_NAME]]></fieldDescription>
</field>
```

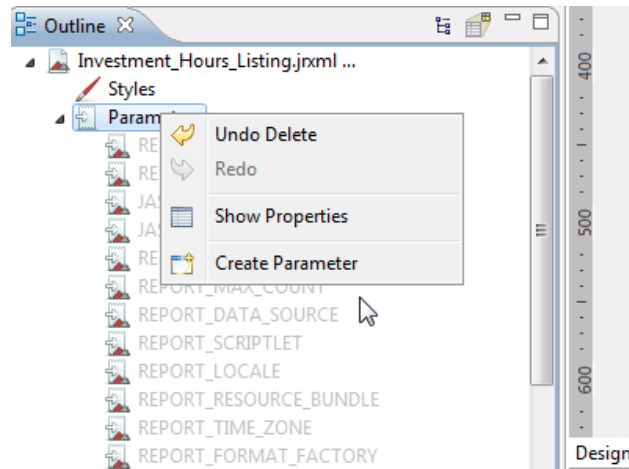
4. Select Replace All.
5. Save your report.

Add Query Parameters

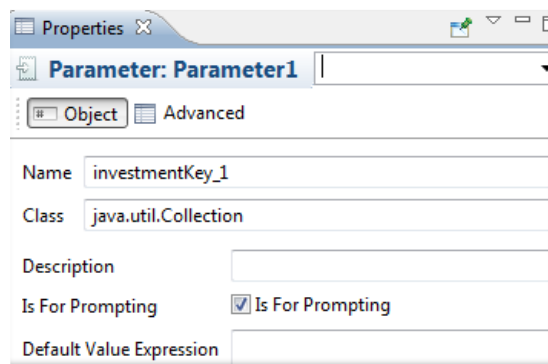
Report-specific parameters in your query need to be added. The ppmUser and ppmUserLanguage were created in the “Insert the PPM Required Parameters” section, so only investmentKey_1, investmentManagerKey_1, and includeInactiveInvestments need to be created.

Follow these steps:

1. Go to the Design tab, right-click Parameters in the Outline pane, and select Create Parameter.



2. Create investmentKey_1 first.
 - a. Choose java.util.Collection for the Class since the parameter is a multi-select parameter.



- b. Go to the Advanced tab and add java.math.BigDecimal for Nested Type Name

Parameter: Parameter1 Search Property	
Object Advanced	
Property	Value
Class	java.util.Collection
Default Value Expression	
Description	
Is For Prompting	<input checked="" type="checkbox"/> true
Name	investmentKey_1
Nested Type Name	java.math.BigDecimal
Properties	[Properties: 0]

3. Create investmentManagerKey_1.
 - a. Choose java.util.Collection for the Class since the parameter is a multi-select parameter.

Properties X

Parameter: Parameter1 Search Property

Object **Advanced**

Name

Class

Description

Is For Prompting ☒ Is For Prompting

Default Value Expression

- b. Go to the Advanced Tab and add java.math.BigDecimal to Nested Type Name.

Parameter: Parameter1 Search Property	
Object Advanced	
Property	Value
Class	java.util.Collection
Default Value Expression	
Description	
Is For Prompting	<input checked="" type="checkbox"/> true
Name	investmentManagerKey_1
Nested Type Name	java.math.BigDecimal
Properties	[Properties: 0]

4. Create includeInactiveInvestments.
5. Choose java.lang.Boolean for the Class since the parameter is a Boolean/checkbox.

Parameter: Parameter1 Search Property

☒ Object ☐ Advanced

Name

Class

Description

Is For Prompting ☒ Is For Prompting

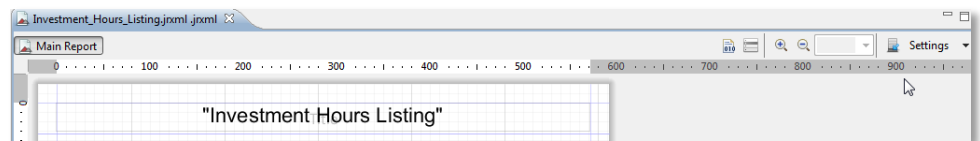
Default Value Expression

6. Save the report.

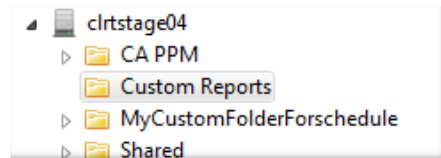
Publish the Report

Follow these steps:

1. Go to the Design tab and click the Publish Report icon.



2. Go to the folder where you want to save the report.



3. Make sure Create Report Unit is checked and fill out the information.

☒ Create Report Unit

Report Unit Label

Report Unit Name (ID)

Report Unit Description

4. Click Next and change Overwrite to Ignore.

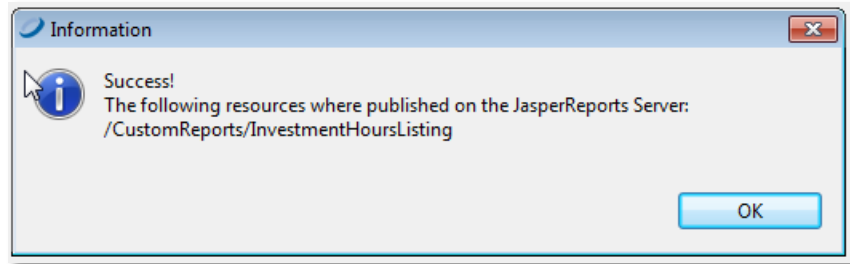
Report Publishing Wizard

Publish To JasperReports Server

Select Resources to publish

Resource	Overwrite	Expression
<input type="checkbox"/> investmentKey_1	Ignore	
<input type="checkbox"/> investmentManagerKey_1	Ignore	
<input checked="" type="checkbox"/> includeInactiveInvestments	Ignore	

5. Click Finish.

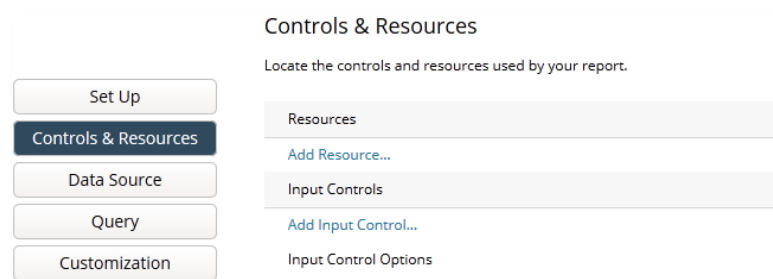


Chapter 6: CA PPM Configuration for a Custom Report

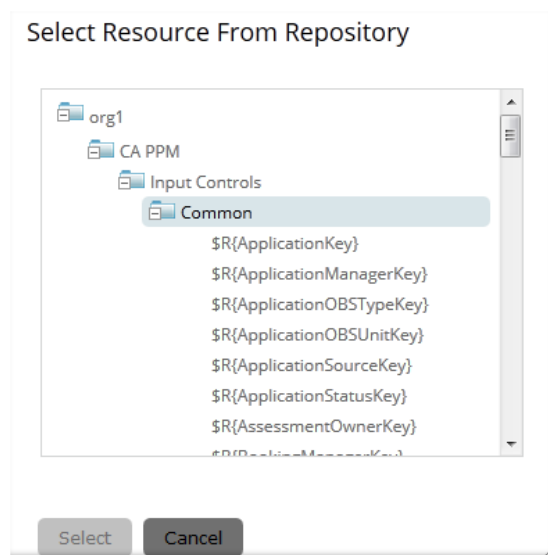
Add Input Controls

Follow these steps:

1. Log in to CA PPM and go to Advanced Reporting.
2. Go to View, Repository, find your report, right-click it, and Edit.
3. Select Controls & Resources.
4. Click Add Input Control.



5. Browse on Select an Input Control from the Repository.

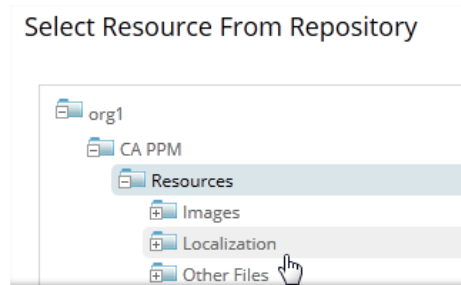


6. Select the Input Controls folder and Common subfolder.
7. Scroll and choose `$R{InvestmentKey}`.
8. Click Next.
9. Add another input control: `$R{InvestmentManagerKey}`
10. Add another input control: `$R{IncludeInactiveInvestmentsKey}` (This will be under the Report Specific subfolder)

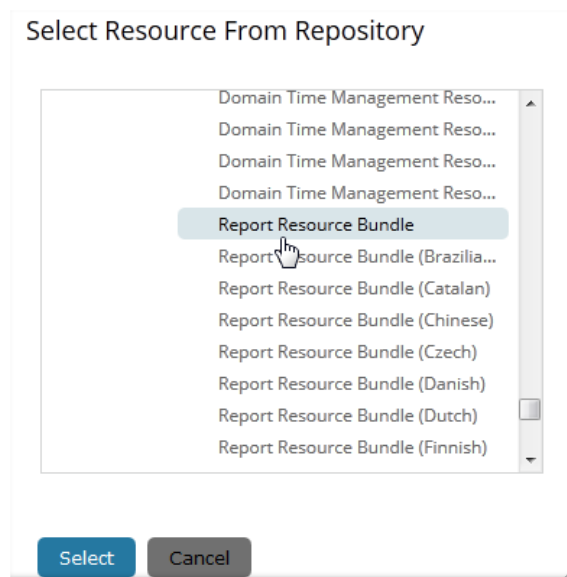
11. Change Display Mode to In Window



12. Click on Add Resource and Select a resource from the Repository and Browse.



13. Choose Report Resource Bundle under the Localization folder



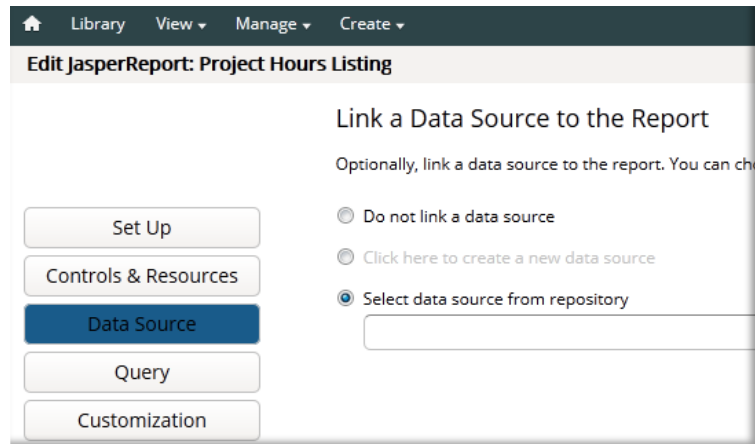
14. Select and when prompted for the Name, just fill in dummy names

A form titled "Type: Resource Bundle" with the following fields:

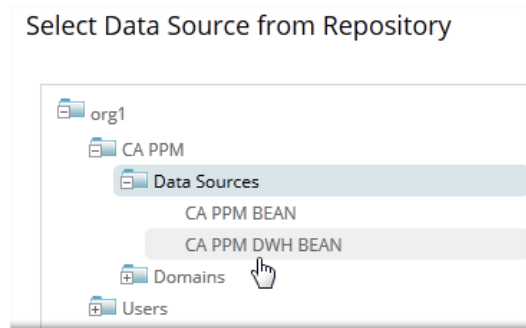
- Selected Resource: /ca_ppm/resources/localization/CSK_Report_Resource_Bundle.properties
- Name (required): CSK_Report_Resource_Bundle
- Resource ID (required): CSK_Report_Resource_Bundle
- Description: CSK_Report_Resource_Bundle

15. Click Next.

16. Click on Data Source and Select data source from repository



17. Browse and select CA PPM DWH BEAN



18. Click Submit.

Run the Report

Follow these steps:

1. Go to View, Repository and find your report.
2. Click your report and fill in the parameter values, if any, and click OK.

You should now see your report.

Investment Hours Listing

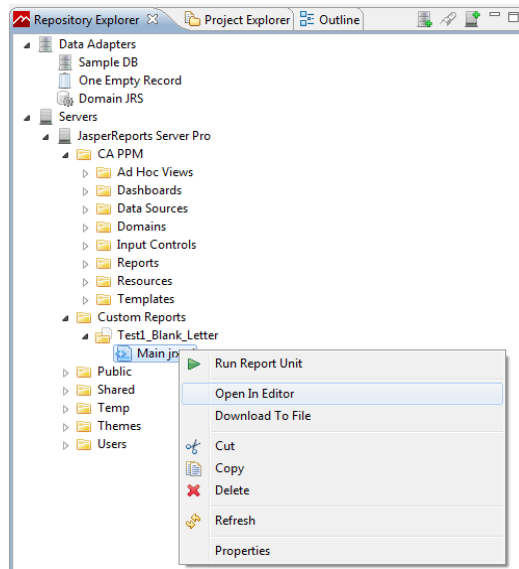
Investment ID	Investment Name	Status	EAC Hours
Administrator, Niku			
1	Denise Project 1	Approved	34698
OW1003	Vacation Time	Approved	0
OW1001	Personal Leave	Approved	0
OW1002	Holiday	Approved	0
Berks, Paul			
PR1016	Automated Security Enhancements	Unapproved	1600
PR1009	Credit Card Processing Enhancement	Unapproved	9090
PR1012	Order Trending Analysis	Unapproved	1600
PR1040	Executive Dashboard Visibility	Approved	1600
PR1019	Financial Workflow Development	Approved	0
PR1022	Email SAN Storage Implementation	Approved	1000
Childers, Valerie			
AP1001	Fixed Assets	Approved	836.8
Granger, Paula			
PG1000	Online Web Portal Program	Approved	0
Lewis, Paul			
AS1002	BEA Weblogic 10.0 Application Server	Approved	4168
AS1016	CA Wily Introscope	Approved	0
AS1030	CA Wily Portal Manager	Approved	4184
AS1028	Vignette Portal	Unapproved	8352
AS1015	Microsoft SQL Server 2008 Standard Edition	Unapproved	12528
AS1029	Sun StorageTek 9970 System - 17TB	Approved	0
AS1001	Dell PowerVault NX1950 Network Storage	Approved	8368
Martin, Paul			
ID1020	Airport Access Security	Unapproved	3824
PR8096	Imaging System Enhancements	Unapproved	6264

Edit the Report

Follow these steps:

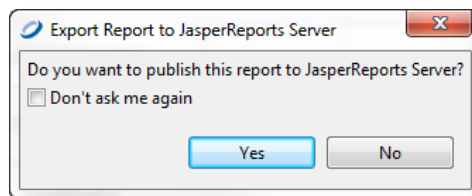
1. To edit the report on the server, expand the Report Unit folder, right-click Main.jrxml, and select Open in Editor.

The report opens locally in Jaspersoft Studio from the server.



2. After making changes to the report, make sure you publish it back to the JasperReports Server.

When you save the report in Jaspersoft Studio, you are prompted to publish the report.

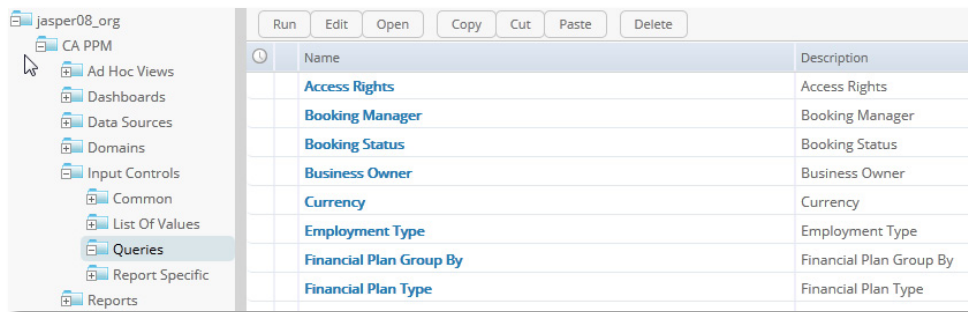


3. Click Yes. Then follow the Report Publishing Wizard.

Chapter 7: Helpful Miscellaneous Information

Input Controls

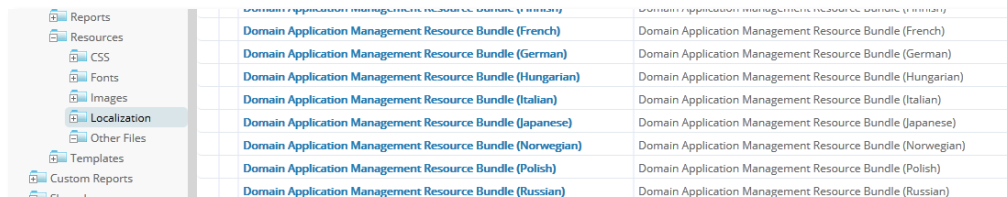
Many Input Controls are defined for CA PPM. You should use these whenever possible. By looking at the queries, you can determine the parameter naming.



Name	Description
Access Rights	Access Rights
Booking Manager	Booking Manager
Booking Status	Booking Status
Business Owner	Business Owner
Currency	Currency
Employment Type	Employment Type
Financial Plan Group By	Financial Plan Group By
Financial Plan Type	Financial Plan Type

Report Resources

All the CA PPM reports are localized and use security. Use these files if you are developing the reports to use multiple languages.



Domain Application Management Resource Bundle (French)	Domain Application Management Resource Bundle (French)
Domain Application Management Resource Bundle (French)	Domain Application Management Resource Bundle (French)
Domain Application Management Resource Bundle (German)	Domain Application Management Resource Bundle (German)
Domain Application Management Resource Bundle (Hungarian)	Domain Application Management Resource Bundle (Hungarian)
Domain Application Management Resource Bundle (Italian)	Domain Application Management Resource Bundle (Italian)
Domain Application Management Resource Bundle (Japanese)	Domain Application Management Resource Bundle (Japanese)
Domain Application Management Resource Bundle (Norwegian)	Domain Application Management Resource Bundle (Norwegian)
Domain Application Management Resource Bundle (Polish)	Domain Application Management Resource Bundle (Polish)
Domain Application Management Resource Bundle (Russian)	Domain Application Management Resource Bundle (Russian)