



regoUniversity

NASHVILLE • 2022

Jaspersoft | Ad Hoc

Your Guides:

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Part I: Introduction



Agenda

- Introduction
- Configuration Basics
- Security Basics
- Installing Jaspersoft Studio
- Interface Introduction
- Data Adapter Setup
- Server Connection Setup

Introductions

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

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

Course Goal: To provide an overview of Jaspersoft functionality in conjunction with Clarity.

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?

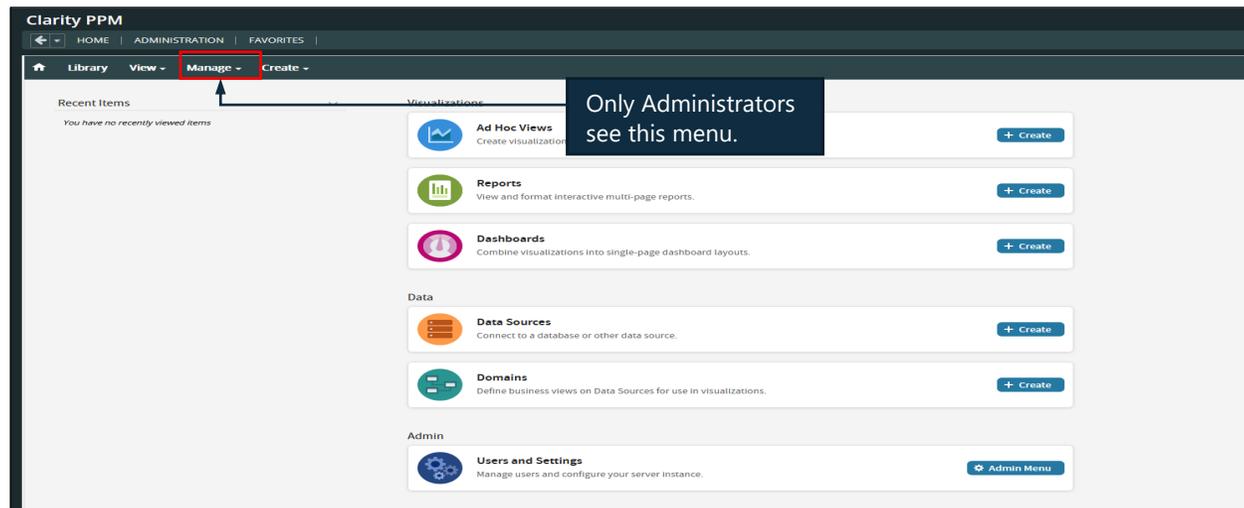
- Jaspersoft is a reporting software that takes information from Clarity to provide easy to read, highly interactive reports for users.
- Jaspersoft is a rights-based reporting system. The capabilities of the Advanced Reporting in Clarity is dependent on what security users are granted.
- Jaspersoft 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 Clarity reports and self-service ad-hoc reporting.
- Ad-hoc reports are easy to use with drag and drop capability, crosstab views, tables or charts.
- Reports can be published in PDF, XLS, XLSX, CSV, DOC X, RTF, ODT, ODS, HTML, or PPTX.

Jaspersoft Security

The average user will see the following modules in Jaspersoft. These modules allow the user to Create Ad Hoc Views, Run Reports, and Create Dashboards.

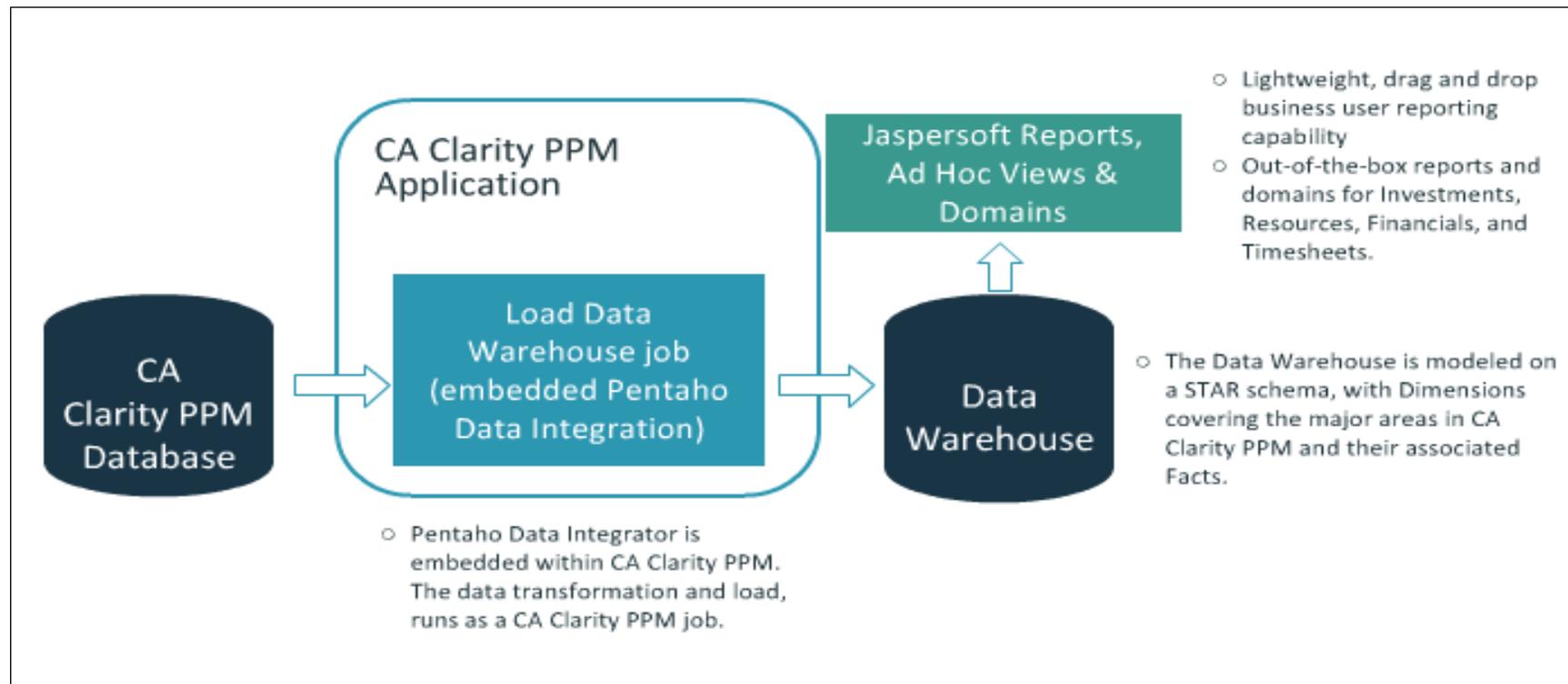
- Advanced Reporting - Ad Hoc Create
- Advanced Reporting - Dashboard Create
- Advanced Reporting – Navigate

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



Data Warehouse Overview

Jaspersoft data warehouse (or data mart) is where Clarity fields are stored for use in reports and/or analysis.



Understanding Jaspersoft Domains

Clarity contains domains that contain the most frequently used product data. Domains provide a **business view** of Clarity's **Data Warehouse**. They are selected via the Ad Hoc viewer when building Ad Hoc Views. Access to domain data is controlled via security permissions.

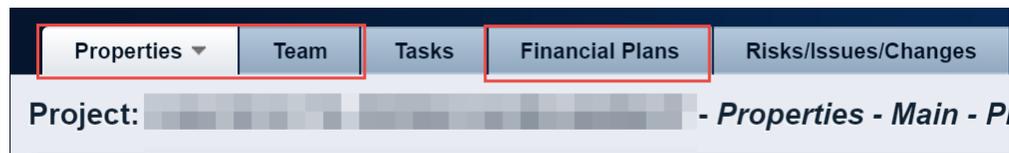
- Application Management
- Custom Master Objects
- Financial Management
- Idea Management
- Investment Management
- Project Management
- Resource Management
- Time Management

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:

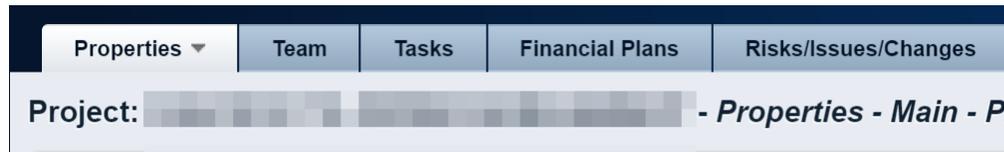


Project Management Domain

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 Clarity is available in the project management domain

Project:



Task:

The screenshot shows the 'Tasks - Task List' view. It includes a filter dropdown set to 'None', a table with one task, and a 'Displaying 1 - 1 of 1' footer.

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

Assignment:

The screenshot shows the 'Assignments' view. It includes a table with columns for Resource, Role, Loading Pattern, Start, Finish, Actuals, Actual Cost (ACWP), ETC, EAC, and ETC By Period (with sub-columns for 3/28/16, 4/4/16, 4/11/16, 4/18/16, 4/25/16, 5/2/16, 5/9/16) and Pending Actuals.

Resource	Role	Loading Pattern	Start	Finish	Actuals	Actual Cost (ACWP)	ETC	EAC	ETC By Period							Pending Actuals	
									3/28/16	4/4/16	4/11/16	4/18/16	4/25/16	5/2/16	5/9/16		
[redacted]		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 Clarity 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 Clarity 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 Clarity 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] [Configure] [Printable Version]

Work Effort = Hours

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 Clarity is available in the financial management domain



Properties | Detail | Processes

Project: [redacted] | Cost Plan: Budget Plan - *Cost Plan Details* Actions

Show: Investment Currency View

Filter: None

	Cost Type	Charge Code	Planned Cost	Actual Cost	Cost Variance	Amounts By Period				
						2016	2017	2018	2019	
<input type="checkbox"/>	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

Displaying 1 - 1 of 1

Save Add Delete Return

Currency = USD

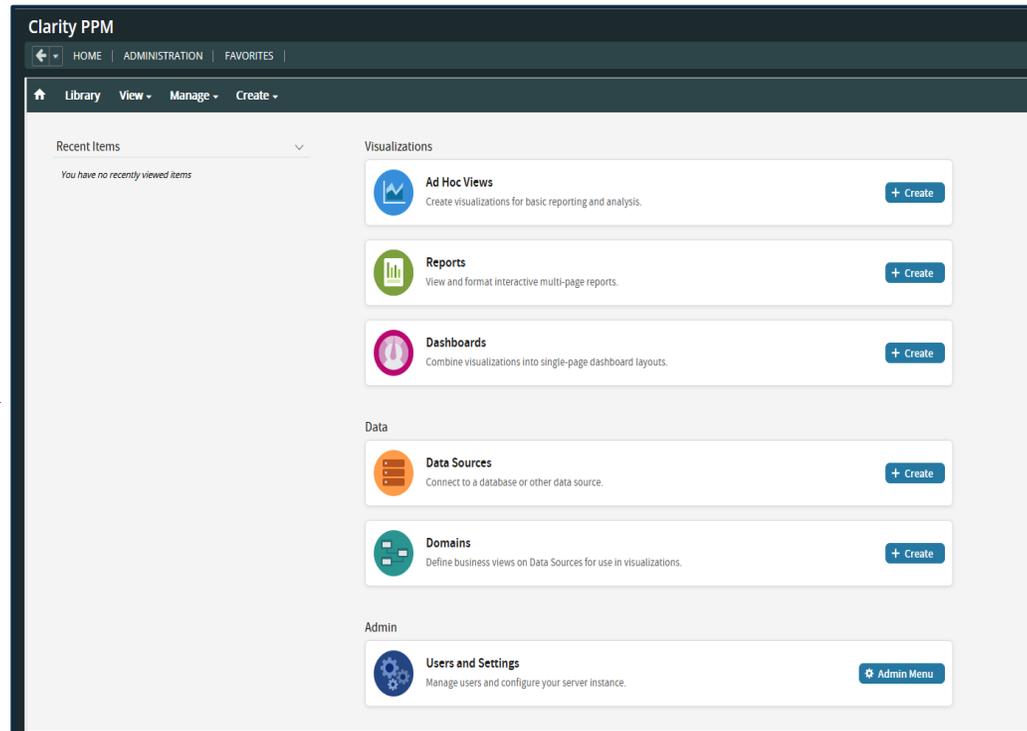
Accessing Advanced Reporting

- Advanced Reporting Navigation



Navigation

- *The ability to navigate to and within Advanced Reporting is based specific security rights.*
Note: Some functions may not be available based on advanced reporting security rights displayed on next page.
- **Home > Advanced Reporting**



Jaspersoft Security

<u>Right</u>	<u>Description</u>	<u>Notes</u>
Advanced Reporting: Ad Hoc Create	Allows resource to navigate to the Advanced Reporting page and create Ad Hoc Views. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_ADHOC_DESIGNER.	Required for Ad Hoc reporting. Note: Domain access is required to enable create rights.
Advanced Reporting: Administer	Allows resource to navigate to the Advanced Reporting page and administer Advanced Reporting. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_ADMINISTRATOR.	By default, this is the Clarity Administrator.
Advanced Reporting: Dashboard Create	Allows resource to navigate to the Advanced Reporting page and create Dashboards. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_DASHBOARD_DESIGNER.	To create a dashboard users, add reports to the dashboard. Domain access is required to create reports.
Advanced Reporting: Data Source Create	Allows resource to navigate to the Advanced Reporting page and create Data Sources. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_DATASOURCE_DESIGNER.	Set to Admin account by default. This is for advanced users who will create new data sources.

Jaspersoft Security (2)

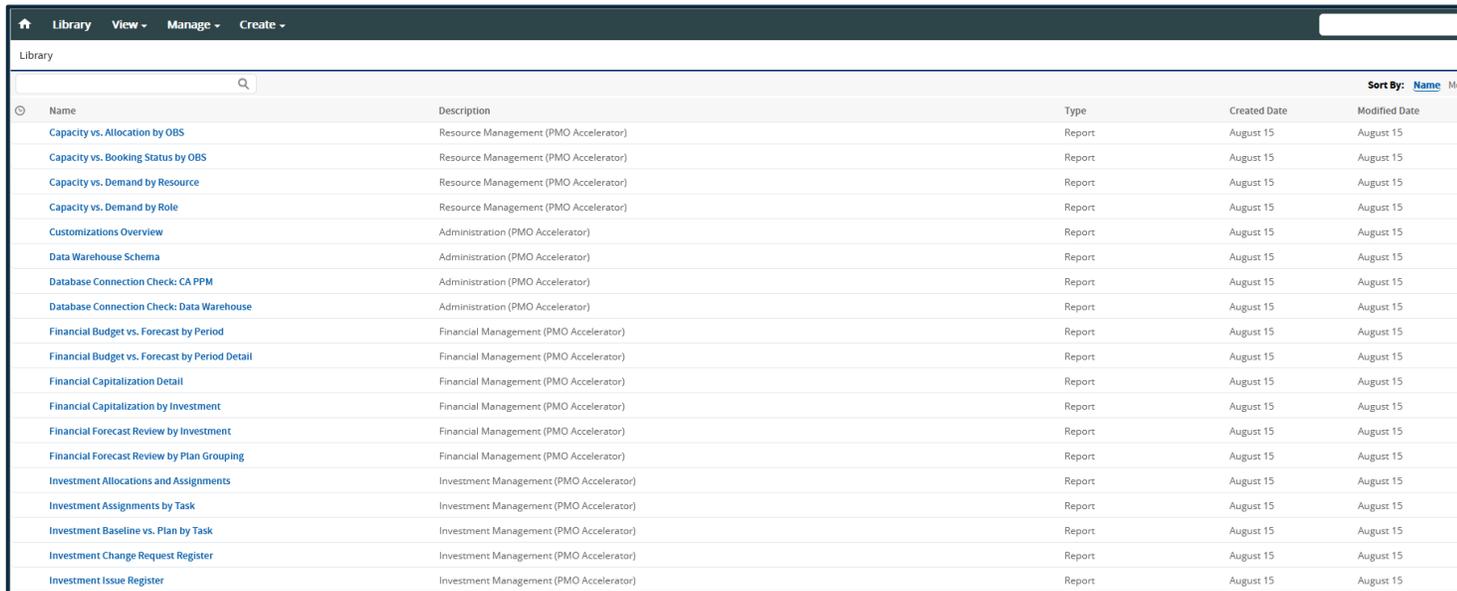
<u>Right</u>	<u>Description</u>	<u>Notes</u>
Advanced Reporting: Domain Create	Allows resource to navigate to the Advanced Reporting page and create Domains. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_DOMAIN_DESIGNER.	Set to Admin account by default. This is for advanced users who will create new domains.
Advanced Reporting: Navigate	Allows resource to navigate to the Advanced Reporting page. Resource is assigned JasperSoft role as ROLE_USER.	By default, all users inherit this right , but Clarity navigation rights are also required.
Advanced Reporting: Report Create	Allows resource to navigate to the Advanced Reporting page and create Reports. Resource is assigned the following JasperSoft roles: ROLE_USER and ROLE_REPORT_DESIGNER.	Domain access is required to create reports.

Advanced Reporting Menu Structure

	<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 Clarity.	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.



The screenshot shows a web application interface for a 'Library' menu. At the top, there are navigation tabs: 'Library', 'View', 'Manage', and 'Create'. Below the tabs is a search bar and a 'Sort By: Name' dropdown menu. The main content is a table with the following columns: Name, Description, Type, Created Date, and Modified Date. The table contains 20 rows of data, each representing a different report or dashboard item.

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

The Manage menu displays:

- **Organizations:** displays information pertaining to the organizations instance of JasperSoft Reporting.
- **Users - Administrator Use:** displays a list of users, allowing an administrator to add or remove assigned roles
- **Roles – Administrator Use:** displays a list of roles, and their members. Also allows for the creation of new roles to be managed within Jaspersoft

Create Menu

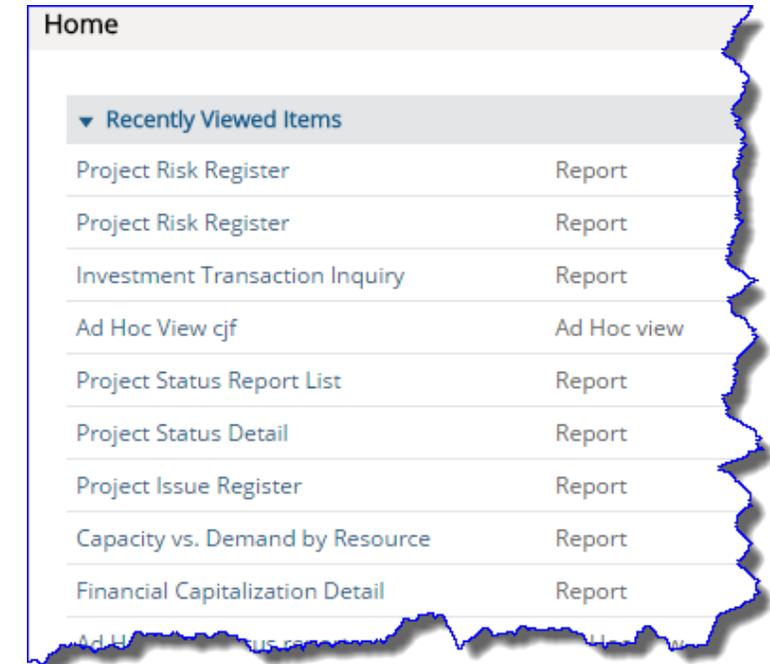
The Create menu displays:

- **Ad Hoc Views:** is a link to create an ad-hoc report.
- **Report:** provides the user with a simple way to access the shared or named user folder to run any saved report.
- **Dashboards:** is a link to where a dashboard report can be created.
- **Domain:** **Administrator Use Only**
- **Data Source:** **Administrator Use Only**

Advanced Reporting Home Screen

The Home screen has two sections:

- **Recently Viewed Items:** displays linkable list of those reports that were viewed by the logged in user.
- **Advanced Reports Security Rights:** allows the user to view various options on the Home screen.
- **Click on Create or View List** under the appropriate section.



Administrators



Admin



Data Sources



Domains

Functional Users



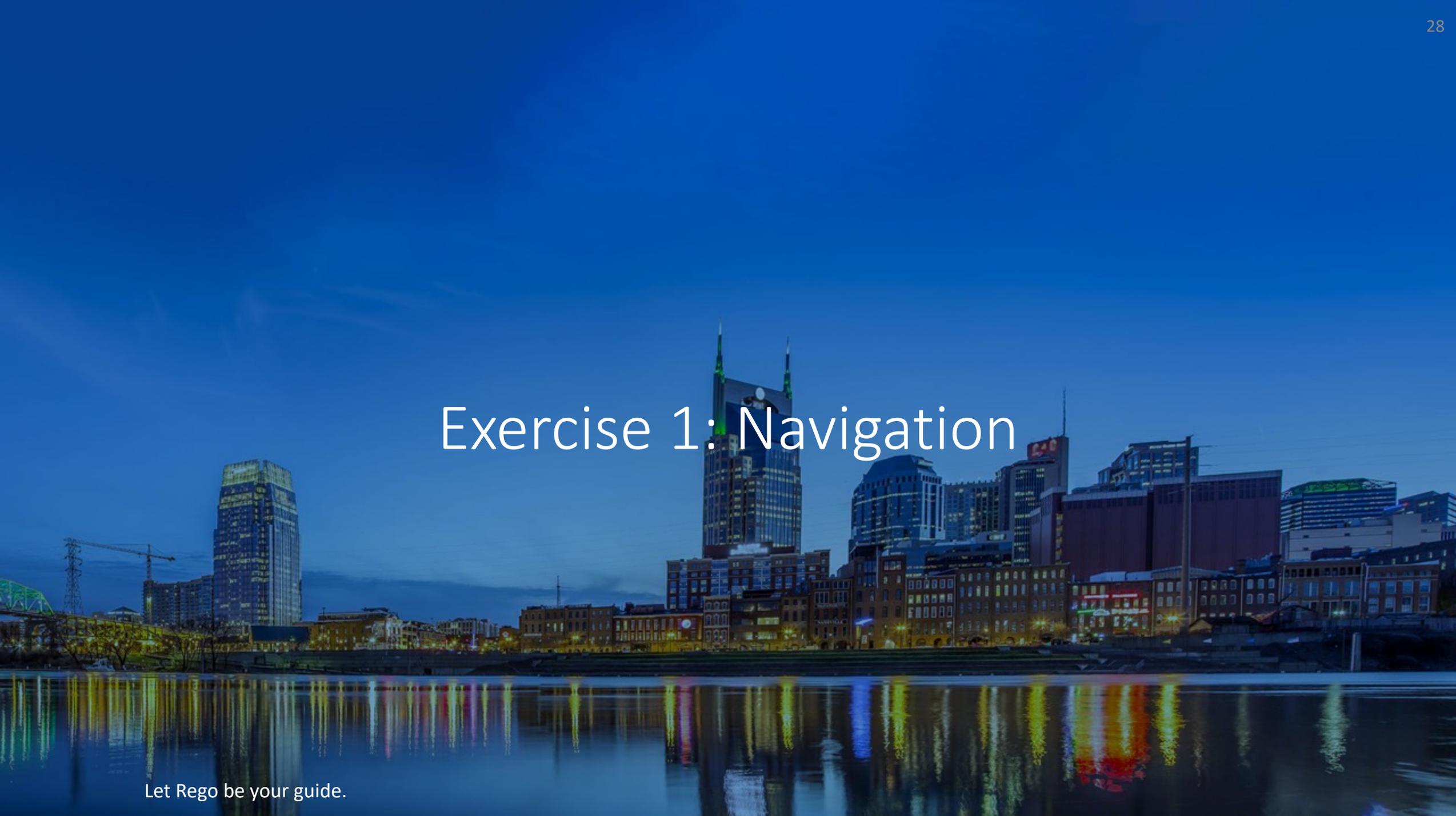
Reports



Ad Hoc Views



Dashboards

A nighttime photograph of a city skyline reflected in a body of water. The sky is a deep blue, and the city lights are visible. The central focus is a tall building with two spires, illuminated with green lights. Other buildings of various heights and colors (yellow, white, blue) are scattered across the skyline. The water in the foreground is calm, creating clear reflections of the buildings and lights.

Exercise 1: Navigation

Let Rego be your guide.

Running a Report

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

Accessing Reports

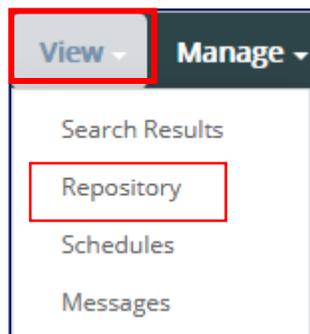
Reports can be accessed three ways:

- **Advanced Reporting Menu > Library** 

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



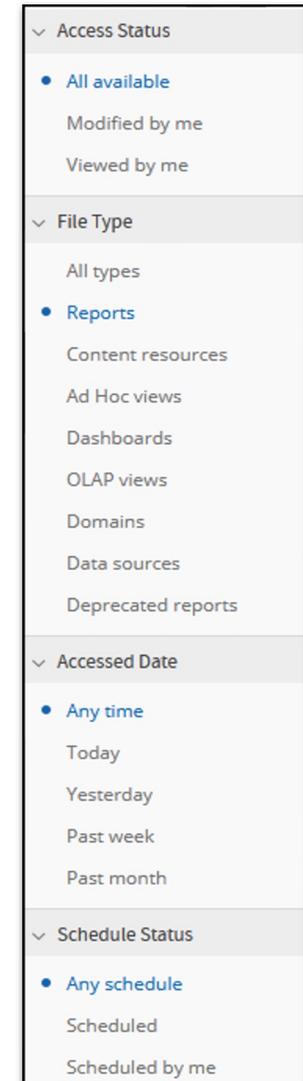
- Click **View > Repository**



Report Section

The Report section displays an alphabetical listing of the reports that are available.

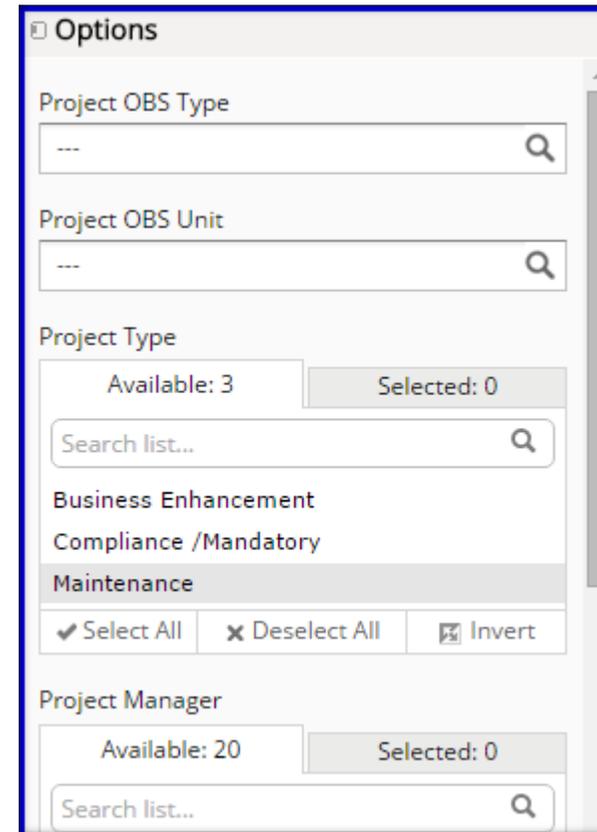
- **Filters** provide the user with the ability to utilize a predefined set of criteria to find a report easily:
 - Modified by Me; Viewed by Me; Accessed Today, etc.
- **Search** to locate report(s) containing specific word(s).



Running a Report

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

- **Options** (report parameters) must be defined to render results.
- Use the **Browse** (binoculars)  to select desired options.
- Browse fields also have auto-suggest functionality.
- After you have defined option criteria, click **Apply** to return results.



Options

Project OBS Type

Project OBS Unit

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

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)

A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its illuminated spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the warm lights of the buildings and streetlights.

Exercise 2: Overview of a Report

Let Rego be your guide.

Overview of an Ad-Hoc Report

✓ Accessing and Creating an Ad-Hoc Report



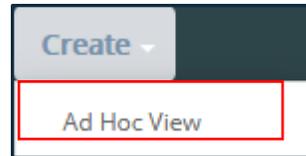
Ad-Hoc Views

- The Ad-Hoc Views editor supports the creation of various formats of reports for your Projects or Portfolios:
 - Table
 - Cross Tabs
 - Charts
- Users can 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 user's 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 Clarity components that are related to the modules in Clarity. A Domain provides a business view of the Clarity 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 Clarity 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

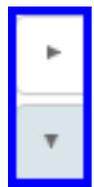
The Ad-Hoc choose data screen will display three main sections.

- 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**

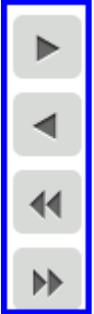


Choose Data - Fields

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

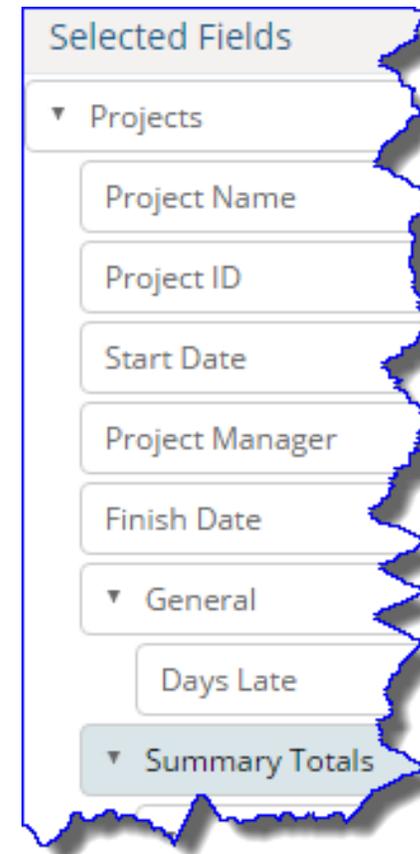


Clicking on the arrows to the left of a listed Items will expand or collapse the hierarchy of components.



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

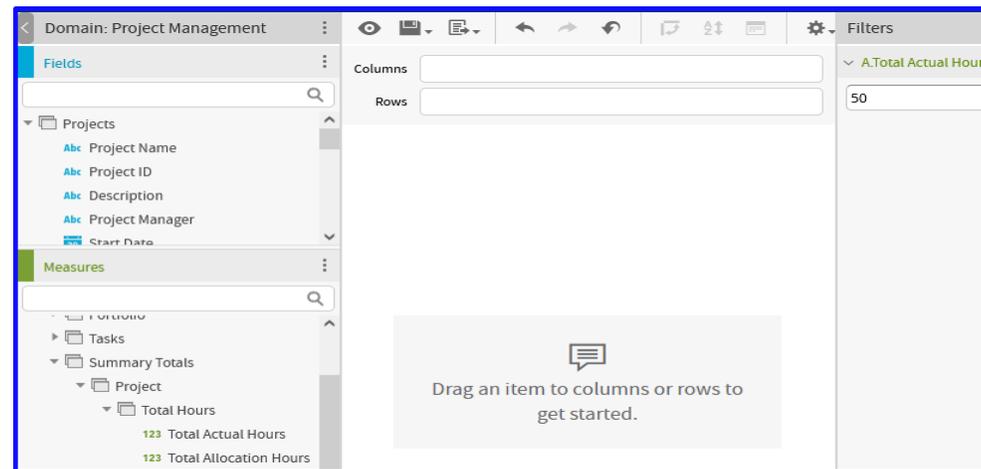
- **Pre-filters** allow the user to select filtering criteria to populate the report with specific types of data.
- **Select the data field(s)** for the filter and use the drop-down to select the criteria. Then **populate the data field**.
 - **Note:** Options may vary based on item(s) selected.
- Once 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:

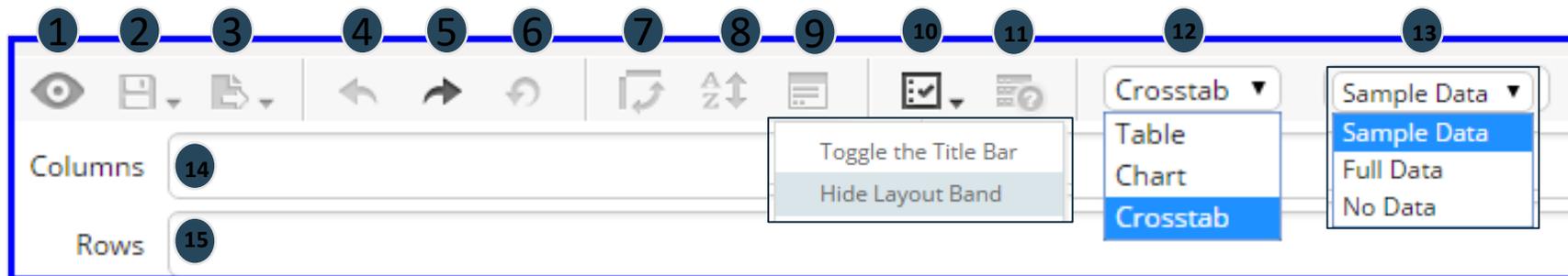
- Fields (components) that were selected from the domain.
- Measures which are fields (components) that contain calculated fields.
- New Ad-Hoc View screen where the layout of the view is created.
- Filter section that display the pre-defined filters and where other filters can be added.
- Custom Filter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



Layout of the View (2)

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

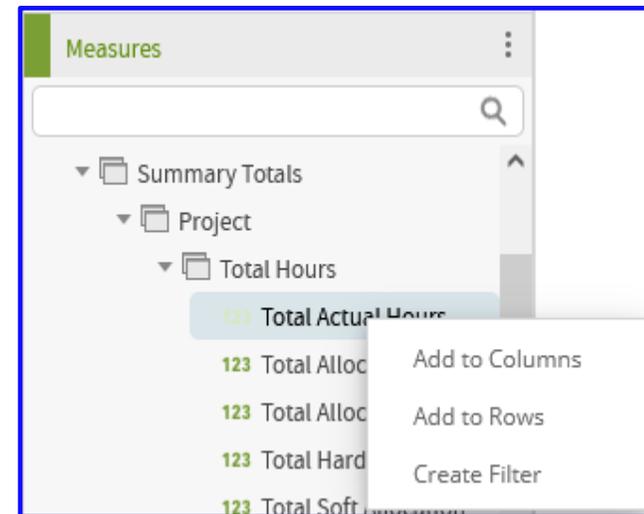
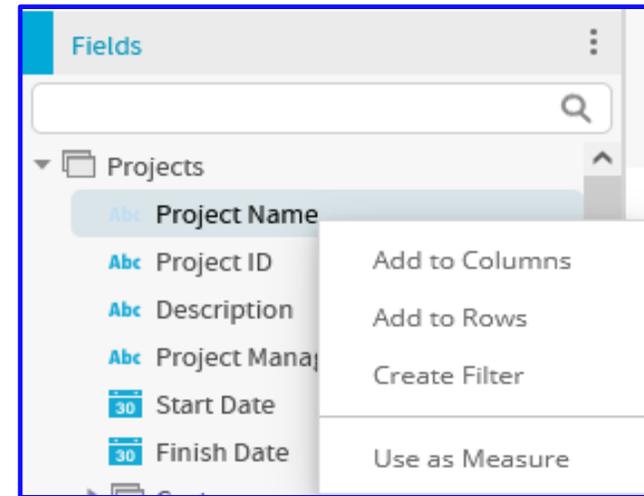
1. Toggle between design and display modes
2. Save
3. Save As
4. Undo the Last Change
5. Redo the Last Change
6. Reset the report to the last saved state
7. Switch the Groups
8. Set the Sort Order
9. Change the Input Values
10. Toggle Title Bar / Hide Layout Band
11. View SQL Query
12. Type of View
13.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

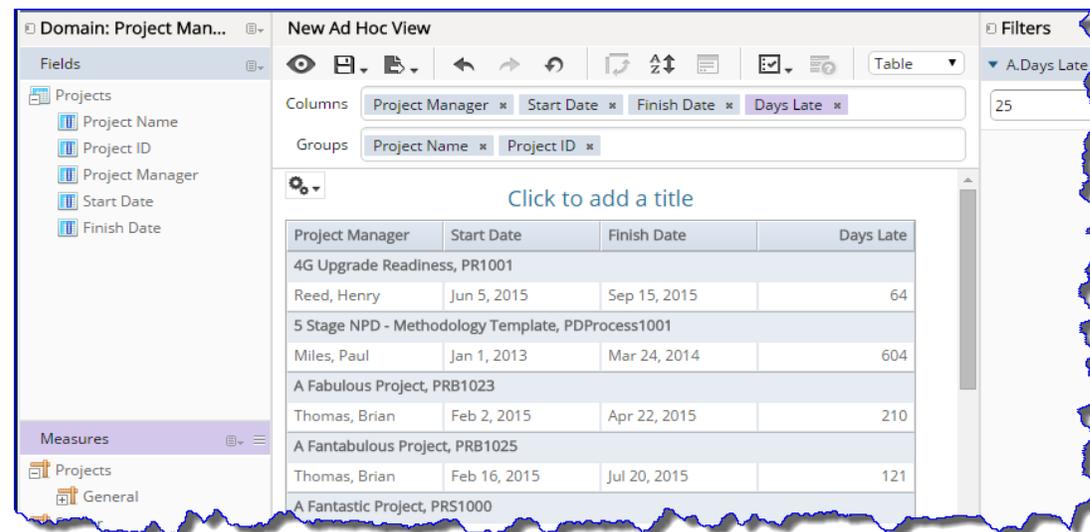
- Right-clicking on a component in the **Fields** section will provide options to Add to Columns, Add to Rows, Create Filter or Use as Measure on the view.
- Right-clicking on a component in the **Measures** section provides the options to Add as a Column, Create Filter, Use for Sorting or Use as Field.



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.



Domain: Project Man... | New Ad Hoc View | Filters: A.Days Late (25)

Columns: Project Manager, Start Date, Finish Date, Days Late

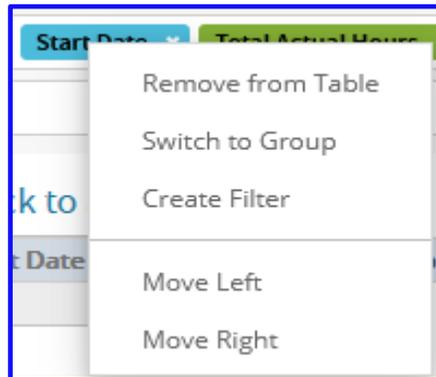
Groups: Project Name, Project ID

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			

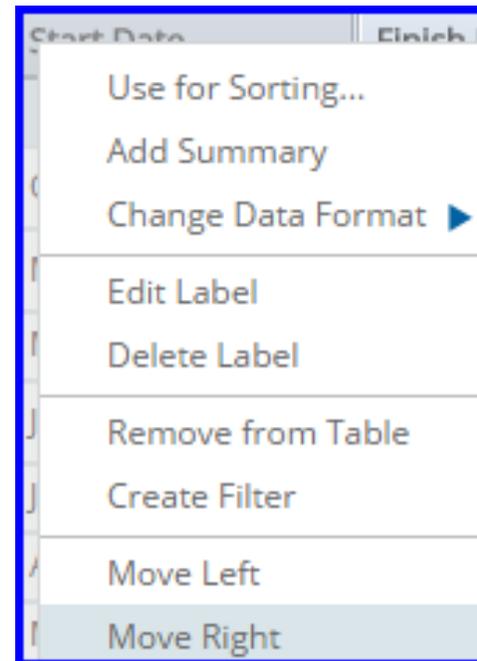
Layout of the View (5)

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



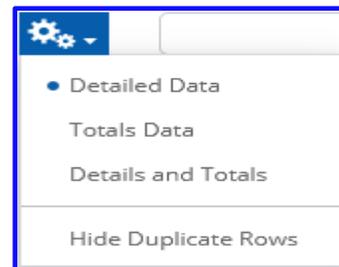
Layout of the View (6)

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.

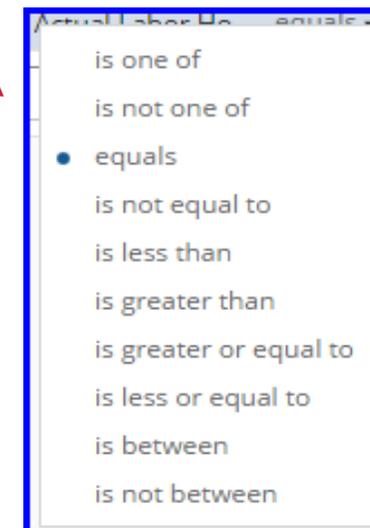
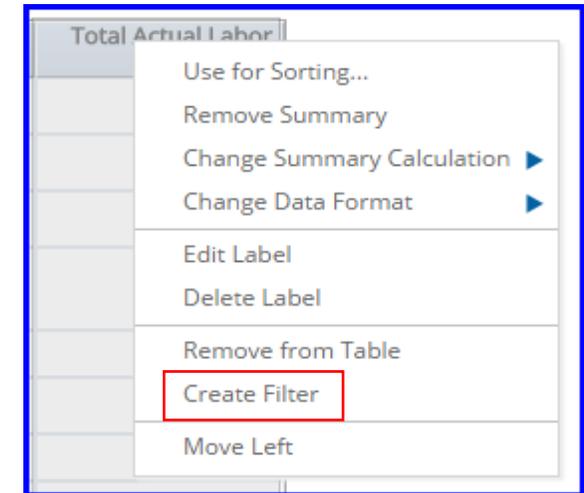
- If using Details and Totals, a Totals column will be added, and values aggregated at the bottom of the view.



	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.



A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its illuminated spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the city's lights.

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

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:

rego
CA PPM
CA PPM Reports Output
Shared
Users

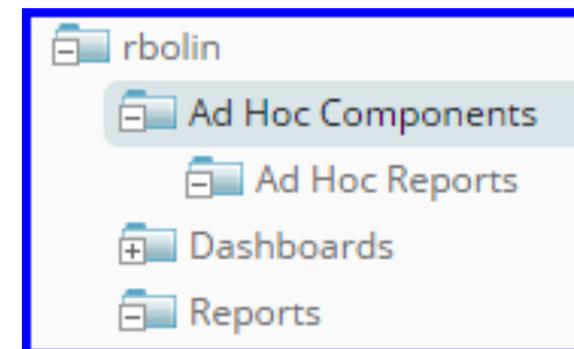
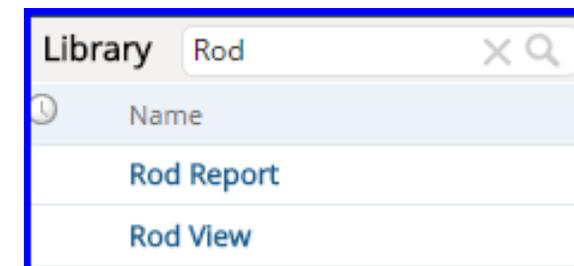
rego
CA PPM
CA PPM Reports Output
Shared
Users
Rego

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.



A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its two spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the warm lights of the buildings and streetlights.

Exercise 4: Creating a Report

Let Rego be your guide.

Creating a Cross Tab View

- Creating a Cross Tabbed Report

Create a Cross Tab Report

- Cross Tab Views (similar to a pivot table) is the grouping of data in rows by one field and in columns by another field.
- For a Cross Tab View to function properly it must contain a measure as either a row or column.

Note: Measure(s) cannot be in both a column and a row in the same Cross Tabbed View.

		Month	Apr-14	Apr-15	Aug-14	Aug-15	Dec-13
		Measures	Total Actual Labor Hours				
Project Name	Project Manager						
+	Totals			76.50		76.50	
+	Totals	237.25	237.25	237.25			
+	Totals		24.00	24.00			
+	Totals			46.00			
+	Totals	99.50	99.50	99.50		99.50	
+	Totals	16.00		16.00			
+	Totals		133.50	133.50			
+	Totals		2,777.52	2,777.52		2,777.52	
Totals	Totals	352.75	3,348.27	556.25	2,854.02	99.50	

A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its two spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the city's lights.

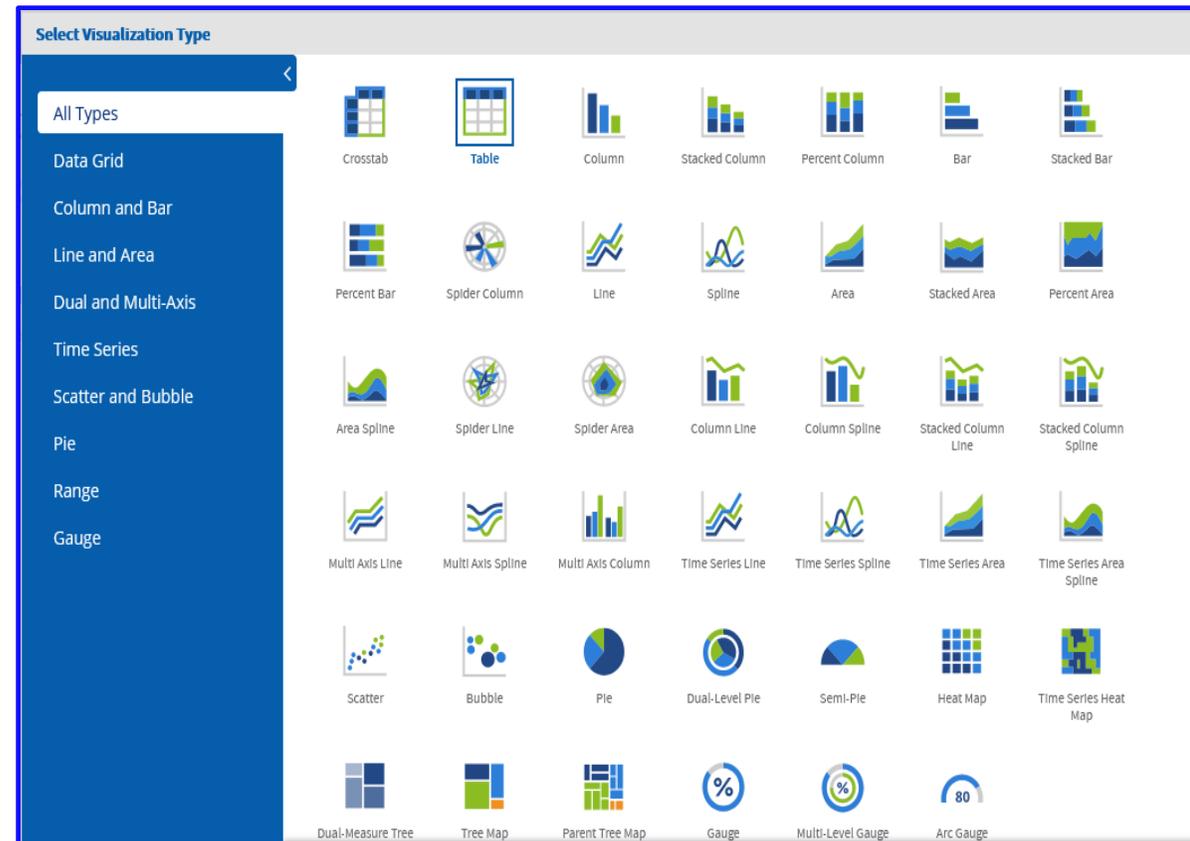
Exercise 5: Creating a Cross Tab Report

Let Rego be your guide.

Creating Charts

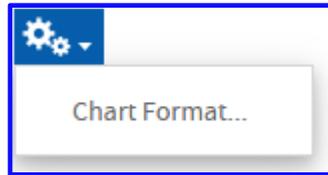
Charts are a flexible way to see data graphically.

- 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:

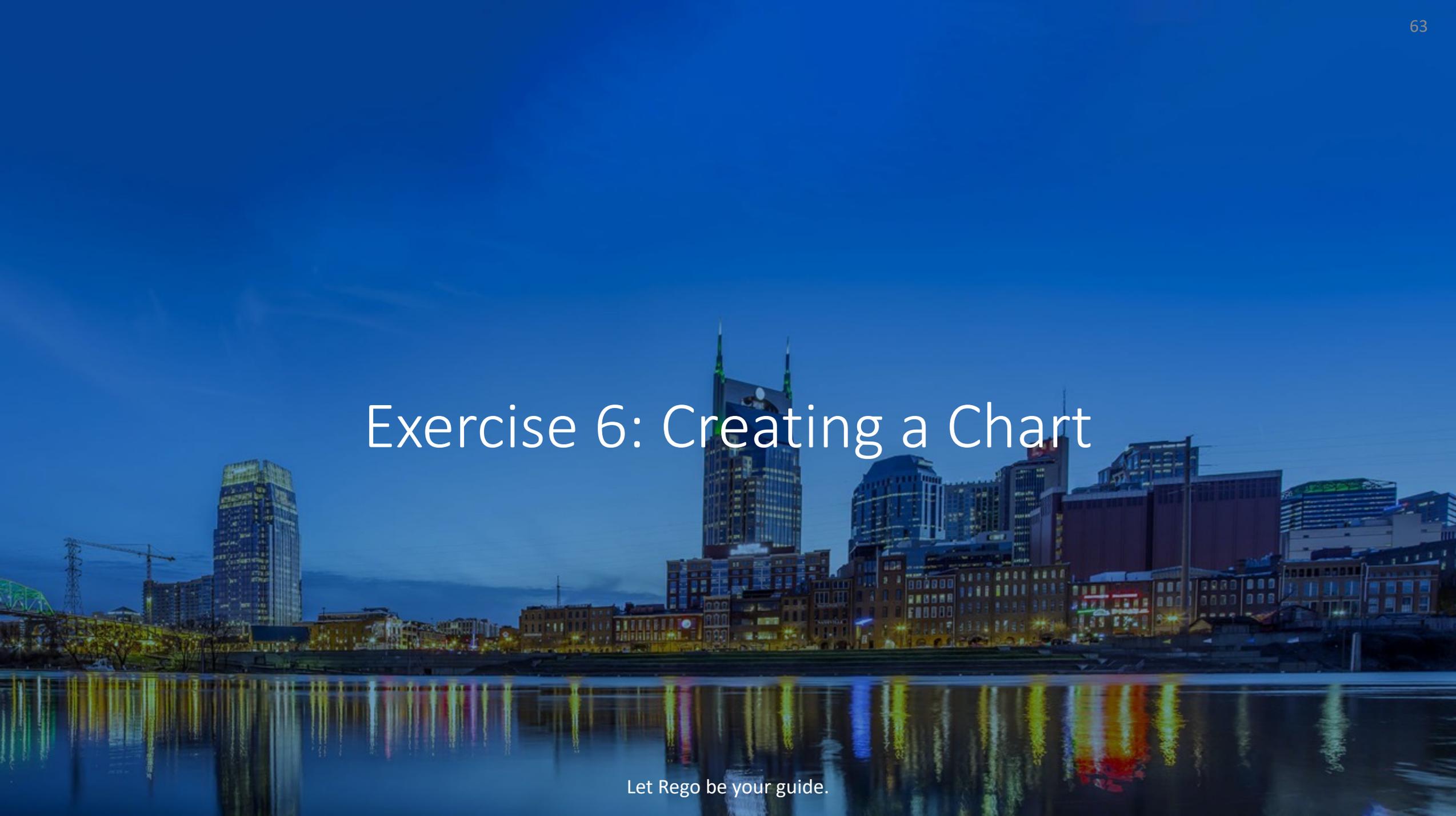
- X Axis**
 - Interval between X-axis labels: 1
 - Rotation of X-axis labels: -45
- Y Axis**
 - Interval between Y-axis labels: 1
 - Rotation of Y-axis labels: 0

The Label tab is selected. It contains settings for the legend and measures:

- Legend**
 - Legend position: Bottom
 - Show legend border
- Measures**
 - Show measure name when only one measure is present
 - Show measure name on value axis
- General**
 - Auto-scale label font size

The Appearance tab is selected. It contains settings for series colors, background colors, line and area, scatter and bubble, and gauges:

- Series Colors**
 - + Add Series Color
- Background Colors**
 - Chart: #FFFFFF
 - Plot: TRANSP
- Line and Area**
 - Show data points on line charts
- Scatter and Bubble**
 - Show line on scatter charts
- Gauges**
 - Layout: Best Fit
 - Min Value: 0
 - Max Value: 100

A nighttime photograph of the Nashville skyline. The Regency Center, a prominent skyscraper with two spires, is brightly lit and its lights are reflected in the water in the foreground. Other buildings of varying heights and styles are also lit up, creating a vibrant cityscape against a dark blue twilight sky. The water in the foreground is calm, providing a clear reflection of the city lights.

Exercise 6: Creating a Chart

Let Rego be your guide.

Creating a Dashboard

- Creating a Dashboard Report



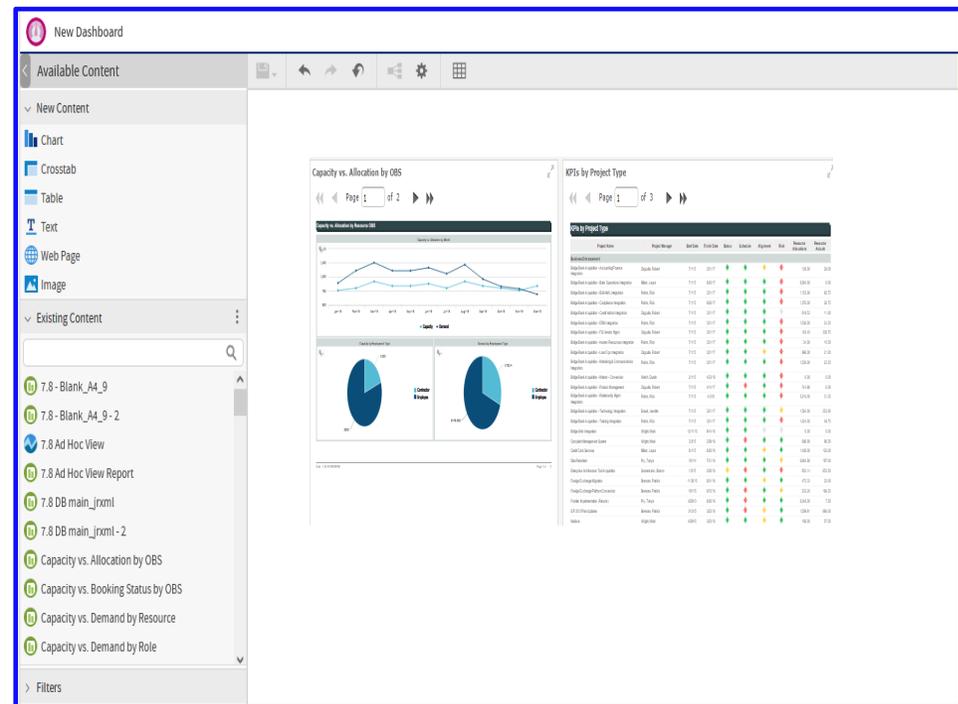
Dashboards

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

Creating a Dashboard Report

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

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



Adding filters to Dashboard Report

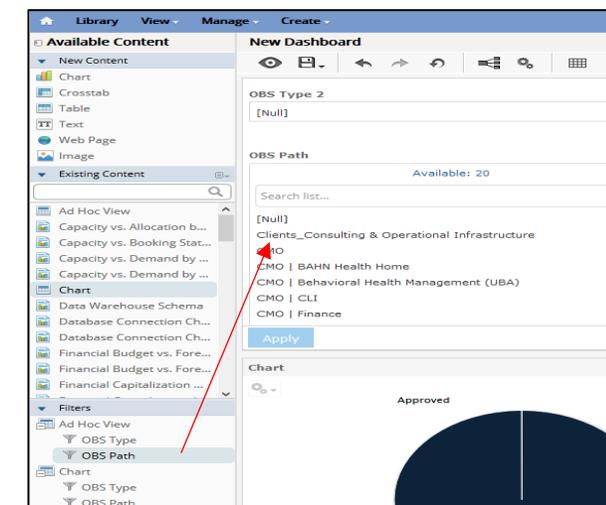
- You can drag and drop the filters available on the reports on to your dashboards.
- To add mapping between parameters of different dashlets, click on  to define parameter mappings.

Parameter Mapping

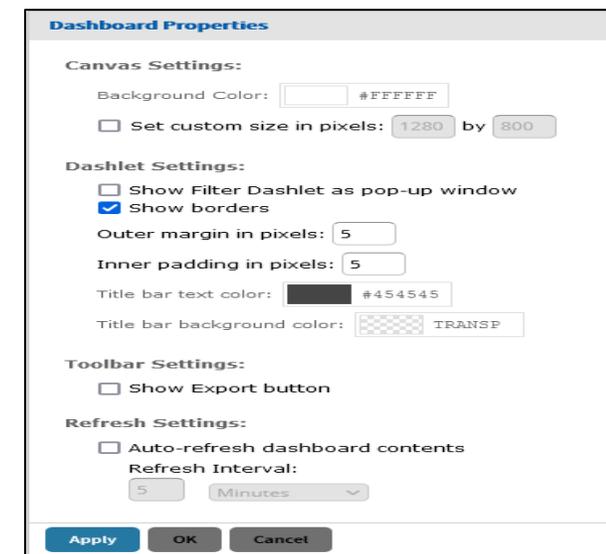
Source Dashlet	Filter/Parameter	Dashlet Affected	Filter/Parameter Affected	
Filter Group	OBS Path	Ad Hoc View	OBS Path	
		Chart	OBS Path	
	OBS Type 2	Ad Hoc View	OBS Type	
		Chart	OBS Type	

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.



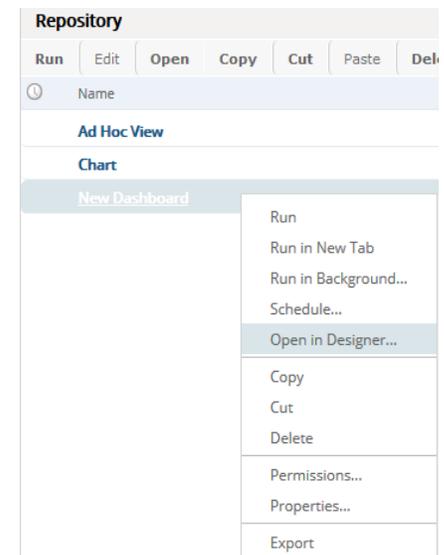
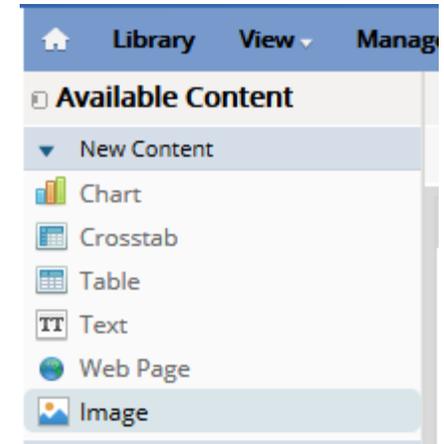
The screenshot shows the dashboard editor interface. On the left, the 'Available Content' panel lists various content types like Chart, Crosstab, Table, Text, Web Page, and Image. Below this, there's a search bar and a list of existing content items. On the right, the 'New Dashboard' panel shows configuration options for 'OBS Type 2' and 'OBS Path'. A red arrow points from the 'OBS Path' filter in the 'Available Content' panel to the 'OBS Path' field in the 'New Dashboard' panel.



The screenshot shows the 'Dashboard Properties' dialog box. It has several sections: 'Canvas Settings' with 'Background Color' set to #FFFFFF and 'Set custom size in pixels' set to 1280 by 800; 'Dashlet Settings' with 'Show Filter Dashlet as pop-up window' unchecked and 'Show borders' checked; 'Outer margin in pixels' set to 5, 'Inner padding in pixels' set to 5, 'Title bar text color' set to #454545, and 'Title bar background color' set to TRANSP; 'Toolbar Settings' with 'Show Export button' unchecked; and 'Refresh Settings' with 'Auto-refresh dashboard contents' unchecked and 'Refresh Interval' set to 5 minutes.

Adding New Content to Dashboard Report

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



A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its two spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the warm lights of the buildings and streetlights.

Exercise 7: Creating a Dashboard

Let Rego be your guide.

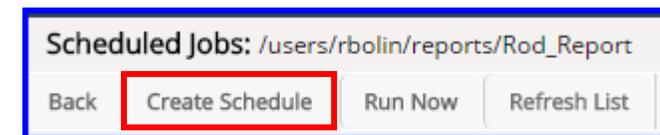
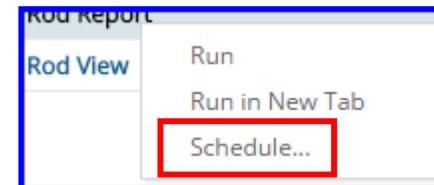
Scheduling a Report

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

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:

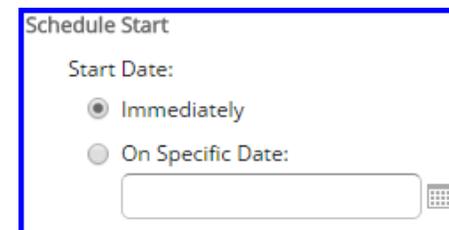
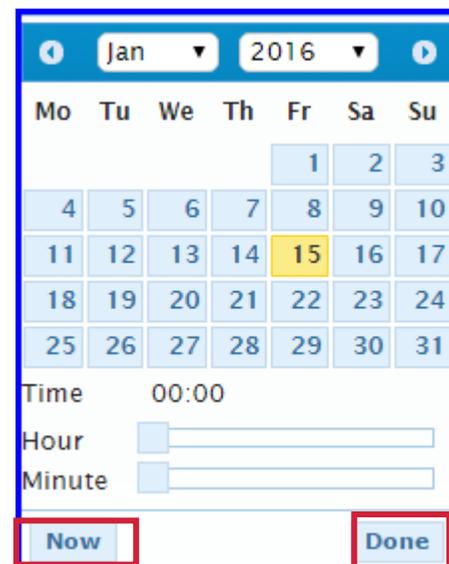


By default the Schedule tab displays to allow the user to define when the report is going to run.

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.

A dialog box titled 'Schedule Start'. It contains a 'Start Date:' label and two radio button options: 'Immediately' (which is selected) and 'On Specific Date:'. Below the 'On Specific Date' option is a text input field with a small calendar icon to its right.A date and time selection interface. At the top, it shows 'Jan' and '2016' with navigation arrows. Below is a calendar grid for January 2016. The date '15' is highlighted in yellow. Below the calendar, there are input fields for 'Time 00:00', 'Hour', and 'Minute'. At the bottom, there are two buttons: 'Now' and 'Done', both highlighted with red boxes.

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:

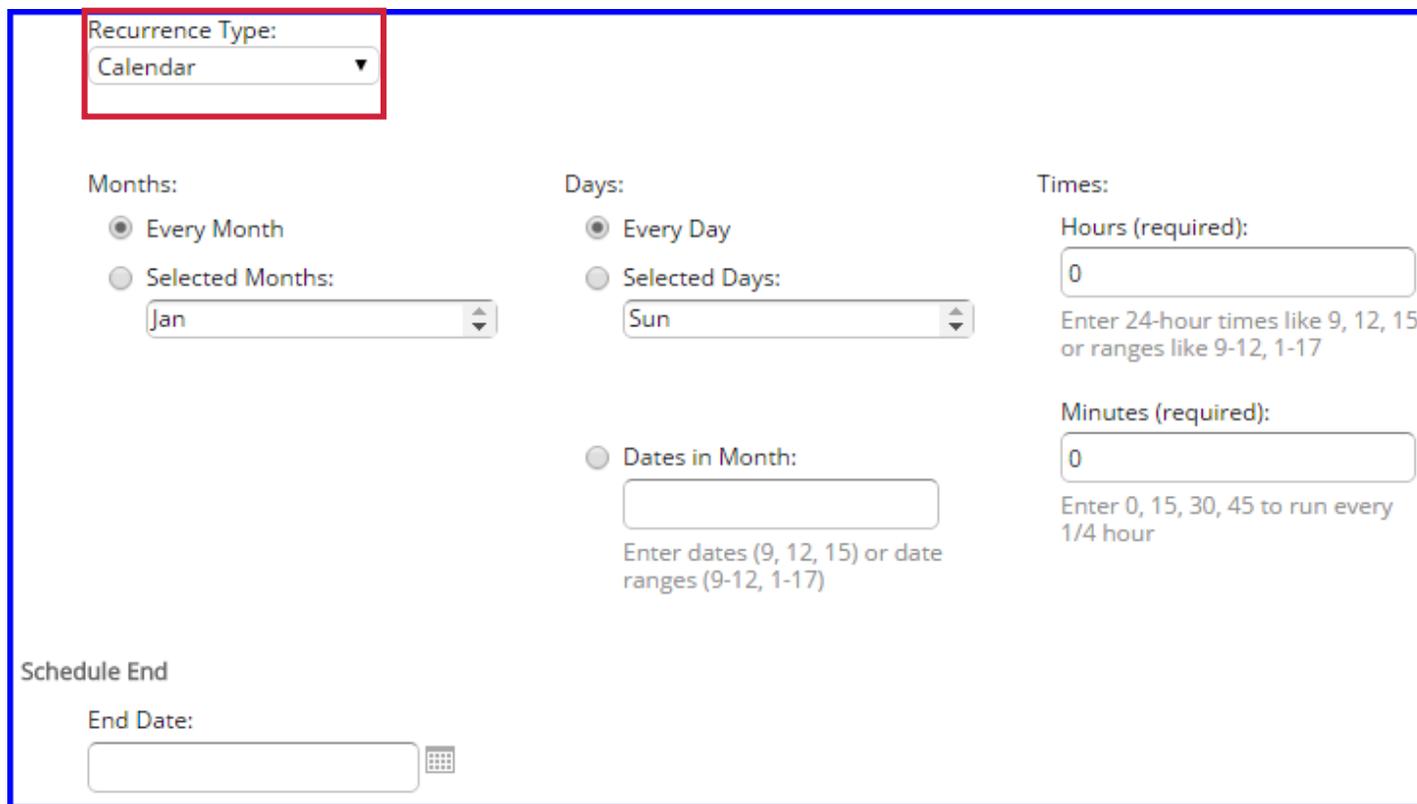
Run indefinitely

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.



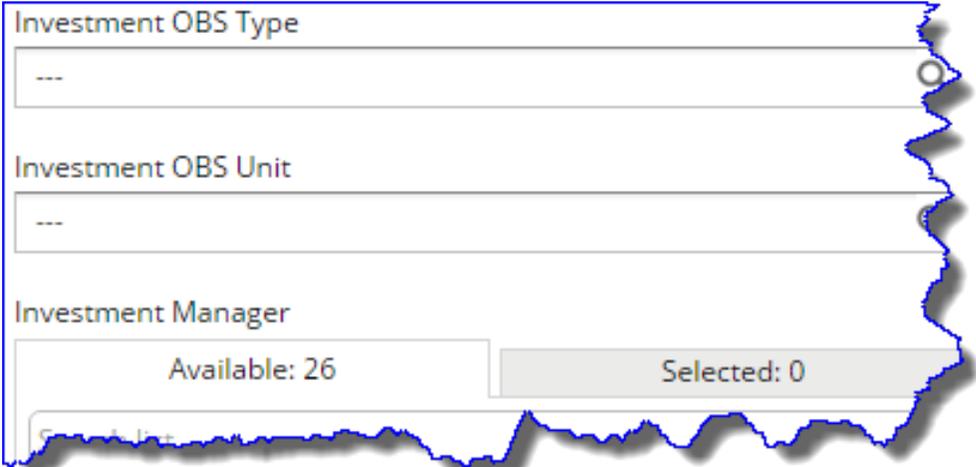
The screenshot displays the 'Schedule Tab' interface with the following elements:

- Recurrence Type:** A dropdown menu with 'Calendar' selected, highlighted by a red box.
- Months:** Radio buttons for 'Every Month' (selected) and 'Selected Months:'. Below 'Selected Months' is a dropdown menu showing 'Jan'.
- Days:** Radio buttons for 'Every Day' (selected), 'Selected Days:', and 'Dates in Month:'. Below 'Selected Days' is a dropdown menu showing 'Sun'. Below 'Dates in Month:' is an empty text input field with instructions: 'Enter dates (9, 12, 15) or date ranges (9-12, 1-17)'.
- Times:** Text input fields for 'Hours (required):' (containing '0') and 'Minutes (required):' (containing '0'). Below the hours field is the instruction: 'Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17'. Below the minutes field is the instruction: 'Enter 0, 15, 30, 45 to run every 1/4 hour'.
- Schedule End:** A section with the label 'End Date:' and an empty text input field with a calendar icon.

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 shows a configuration window for report parameters with a torn paper effect on the right side. It contains three dropdown menus and a selection summary:

- Investment OBS Type**: A dropdown menu with a single option: ---
- Investment OBS Unit**: A dropdown menu with a single option: ---
- Investment Manager**: A dropdown menu showing a summary: Available: 26, Selected: 0

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 the 'Email Notification' configuration interface, divided into two main sections: 'Send report when scheduler runs' and 'Send job status notifications'.

Send report when scheduler runs:

- To:** Text input field with a placeholder and the instruction 'Use commas to separate addresses'.
- CC:** Text input field with a placeholder and the instruction 'Use commas to separate addresses'.
- BCC:** Text input field with a placeholder and the instruction 'Use commas to separate addresses'.
- Subject:** Text input field with a placeholder.
- Message:** 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:** Text input field with a placeholder and the instruction 'Use commas to separate addresses'.
- Subject:** Text input field with a placeholder.
- Send success notification:** checkbox with a 'Success Message:' text area below it.
- Send failure notification:** checkbox with a 'Failure Message:' text area below it.
- Include report job information:** checkbox
- Include stack trace:** checkbox

A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its two spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the warm lights of the buildings and streetlights.

Exercise 8: Scheduling a Report

Let Rego be your guide.

A nighttime photograph of a city skyline, likely Nashville, Tennessee, featuring the prominent AT&T Building with its illuminated spires. The city lights are reflected in a body of water in the foreground. The sky is a deep blue, and the overall scene is illuminated by the warm and cool lights of the city.

Exercise 9: Create Your Own

Let Rego be your guide.

Thank You For Attending regoUniversity

Instructions for PMI credits

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



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



Phone

888.813.0444



Email

info@regouniversity.com



Website

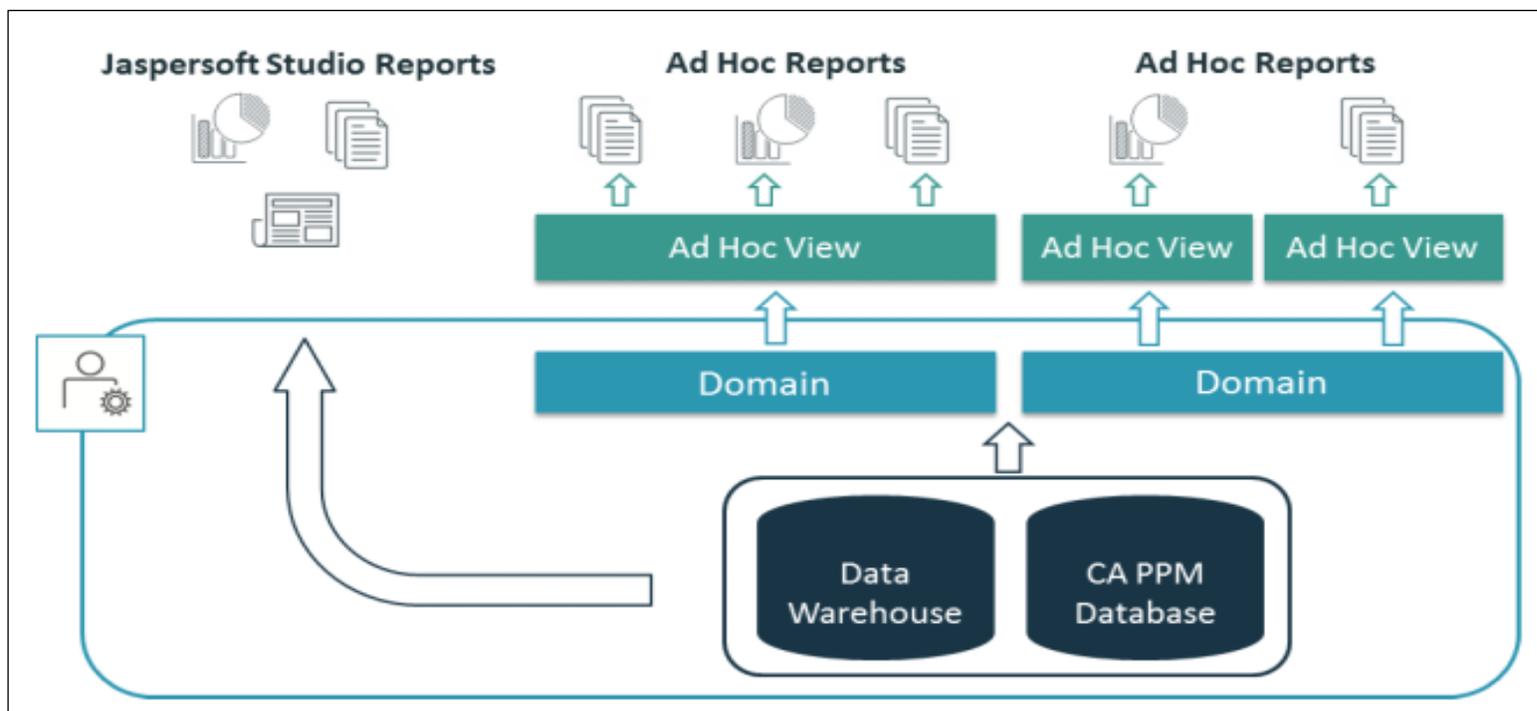
www.regouniversity.com

Appendix

- 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 Clarity 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 configuration page for a custom attribute. The title is "Object: Risk | Attribute: Escalate - Object Attribute". 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 for Jaspersoft to work correctly. They are:

- Create and Update Jaspersoft Users Job
 - Creates active Clarity Users into Jaspersoft.
 - Security rights driven
- Load Data Warehouse Job
 - Extracts data from Clarity's databases
 - Optimizes the data for read performance purposes
- Load Data Warehouse Access Rights Job
 - Extracts access rights for investments and resources from Clarity 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 Clarity 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.

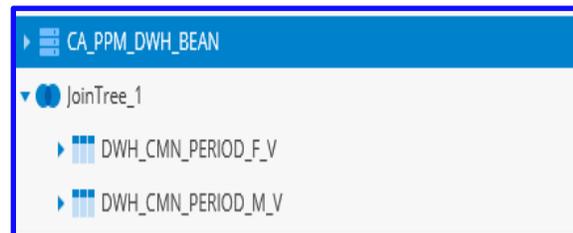
8. Add the following DWH tables you want to bring into your new domain to the selected tables
9. Click the Joins tab
10. Join the two tables based on the data need.

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

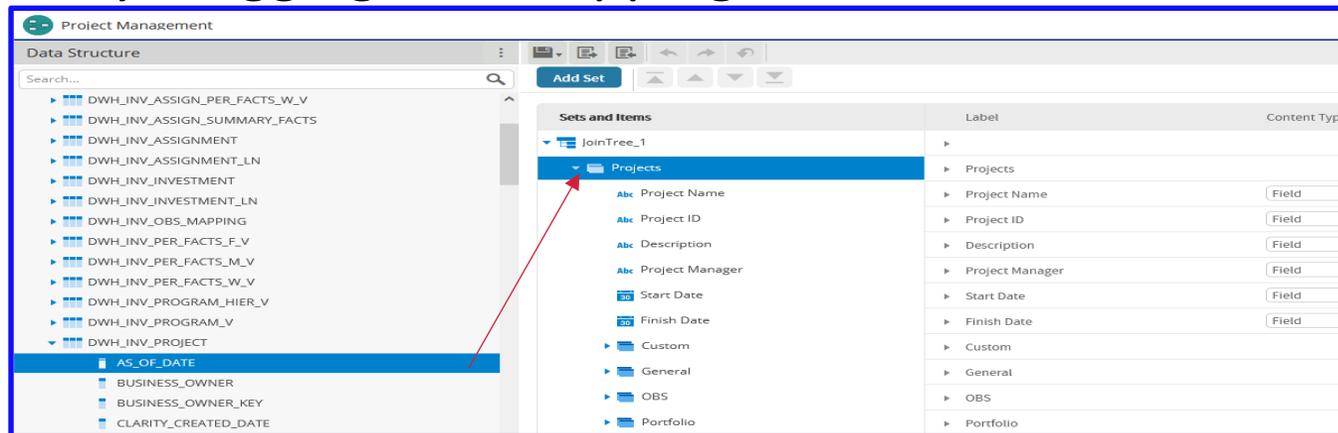
Available Tables	Selected Tables
CMN_DB_HISTORY CMN_DWH_INSTALL_HISTORY DWH_CFG_AUDIT DWH_CFG_AUDIT_HISTORY DWH_CFG_EXTRA_COLUMNS DWH_CFG_LOG DWH_CFG_OBJECT_TYPE DWH_CFG_SETTINGS DWH_CFG_SETTINGS_HISTORY DWH_CMN_ERROR_MESSAGE DWH_CMN_ERROR_MSG_HISTORY DWH_CMN_EXCHANGE_RATE DWH_CMN_MV_LOOKUP DWH_CMN_OBS_HIERARCHY 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



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



Questions?



Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- 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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