

caWorld<sup>10</sup>

# hands-on lab: using Business Objects<sup>™</sup> with CA Clarity<sup>™</sup> PPM

**Session # PP505LR**

Focus Area Project & Portfolio Management



- Attend this hands-on Business Objects lab where you will create your own custom universe and join that universe to the CA universes in order to report on your company specific needs.
- In this session you will:
  - add attributes and some optional filters to your universe, and
  - use this universe to create a WEBI document with optional parameters and expose it in CA Clarity PPM so that it's available to your users.
- You will also learn the CA standards and tips on using Business Objects.

# agenda

- Add attributes to the Really Big Company (RBC) Project Attributes universe
- Link the Global Delivery (GD) Project and RBC Project Attributes universes together in the RBC Project Universe
- Create a WEBI document using the RBC Project Attributes universe
- Add the report to CA Clarity PPM and run it

# modify a custom universe

- RBC Incorporated has 4 custom attributes that were added to CA Clarity PPM to fit their needs.
  - Strategic Project? (Boolean)
  - Strategic Owner (Browse)
  - Strategic Factor (Lookup)
  - Strategic Notes (String)
- A custom universe has already been set up with Strategic Project and Strategic Owner. The company now needs Strategic Factor and Strategic Notes added.
  - Login to CA Clarity (Favorites, CA Clarity PPM Login) and go to Administration
  - Login: admin, Password: caw

# modify a custom universe

## – Research Attributes in CA Clarity

- Go to Objects and choose Project
- Look in Attributes for Strategic Notes
  - Make note of the data type (string)
- Look for Strategic Factor
  - Data Type is Lookup – String
  - Make note of Lookup = Strategic Factor
- Go to Lookups and find 'Strategic Factor'
  - Make note of the lookup ID, hidden key and display attribute
  - These are important for building a derived table

# modify a custom universe

– Click the Business Objects Designer icon on your desktop

– Login to Business Objects

- System: **ppmlabcaw10**
- User: **administrator**
- Password: **Claritybo**
- Authentication: **Enterprise**

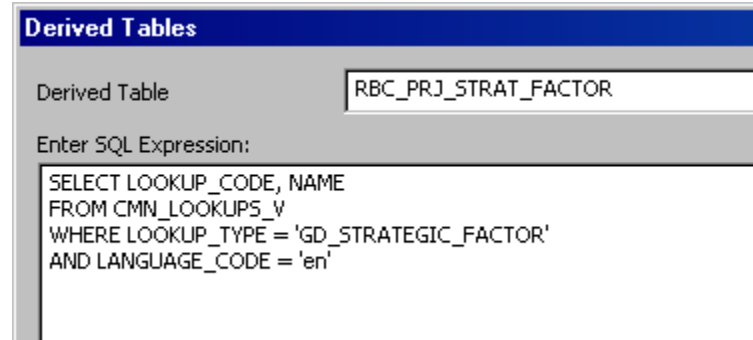


– Import the custom universe:

- RBC Project Attributes (DO NOT USE)
- Insert Strategic Notes
- Create a derived table (RBC\_PRJ\_STRAT\_FACTOR)

# modify a custom universe

- Right Click in the Business Objects Designer structure window
- Choose Derived Tables
- Add the syntax for the table



- Derived Table.txt is on the Desktop
- Click the Check Syntax button to verify your syntax
- Click OK

# modify a custom universe

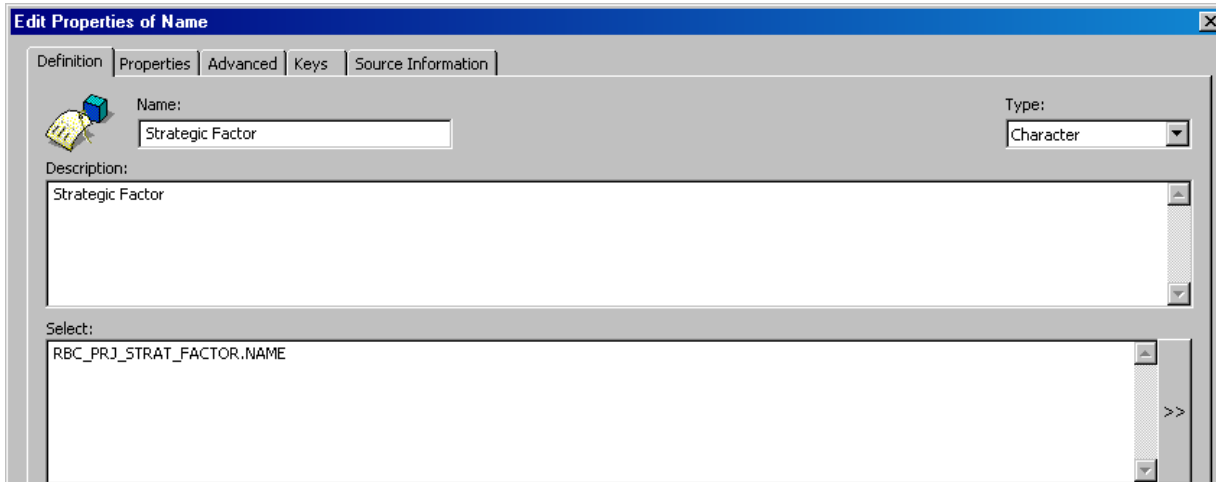
- Right click in the structure panel and add a new join
  - RBC\_PRJ\_ODF\_CA\_PROJECTS.STRATEGIC\_FACTOR=RBC\_PRJ\_STRAT\_FACTOR.LOOKUP\_CODE
  - Outer join for rbc\_prj\_odf\_ca\_projects.
  - 1 to N with N for rbc\_prj\_odf\_ca\_projects
- Add the Name field from rbc\_prj\_strat\_factor as an object
  - Simply drag the Name field from the derived table over as an object





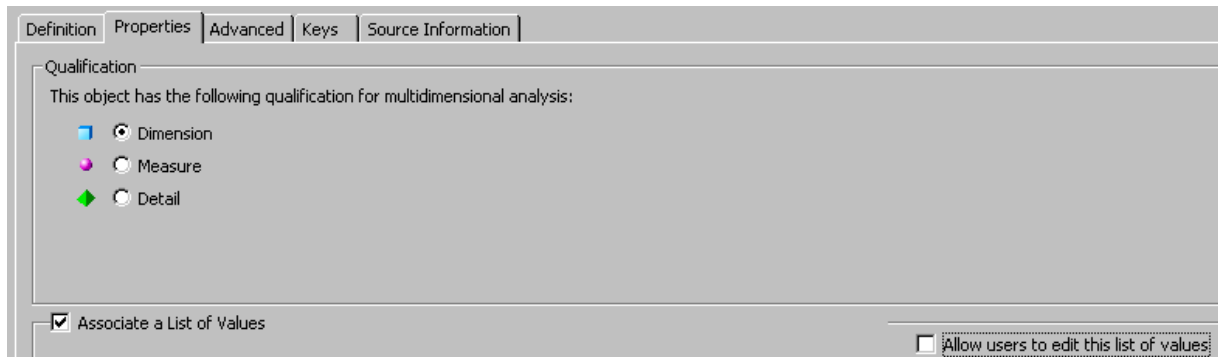
# modify a custom universe

## – Edit the Properties for Name (Strategic Factor)



The screenshot shows the 'Edit Properties of Name' dialog box with the 'Properties' tab selected. The 'Name' field contains 'Strategic Factor'. The 'Type' dropdown is set to 'Character'. The 'Description' field contains 'Strategic Factor'. The 'Select' field contains 'RBC\_PRJ\_STRAT\_FACTOR.NAME'. There is a '>>' button on the right side of the 'Select' field.

## – Uncheck 'Allow users to edit this list of values'



The screenshot shows the 'Edit Properties of Name' dialog box with the 'Advanced' tab selected. The 'Qualification' section is expanded, showing 'This object has the following qualification for multidimensional analysis:'. There are three radio buttons: 'Dimension' (selected), 'Measure', and 'Detail'. At the bottom, there is a checkbox 'Associate a List of Values' which is checked, and a checkbox 'Allow users to edit this list of values' which is unchecked.

# modify a custom universe

- Drag strategic factor from the rbc prj\_odf\_ca\_projects table over as an object and modify the properties.

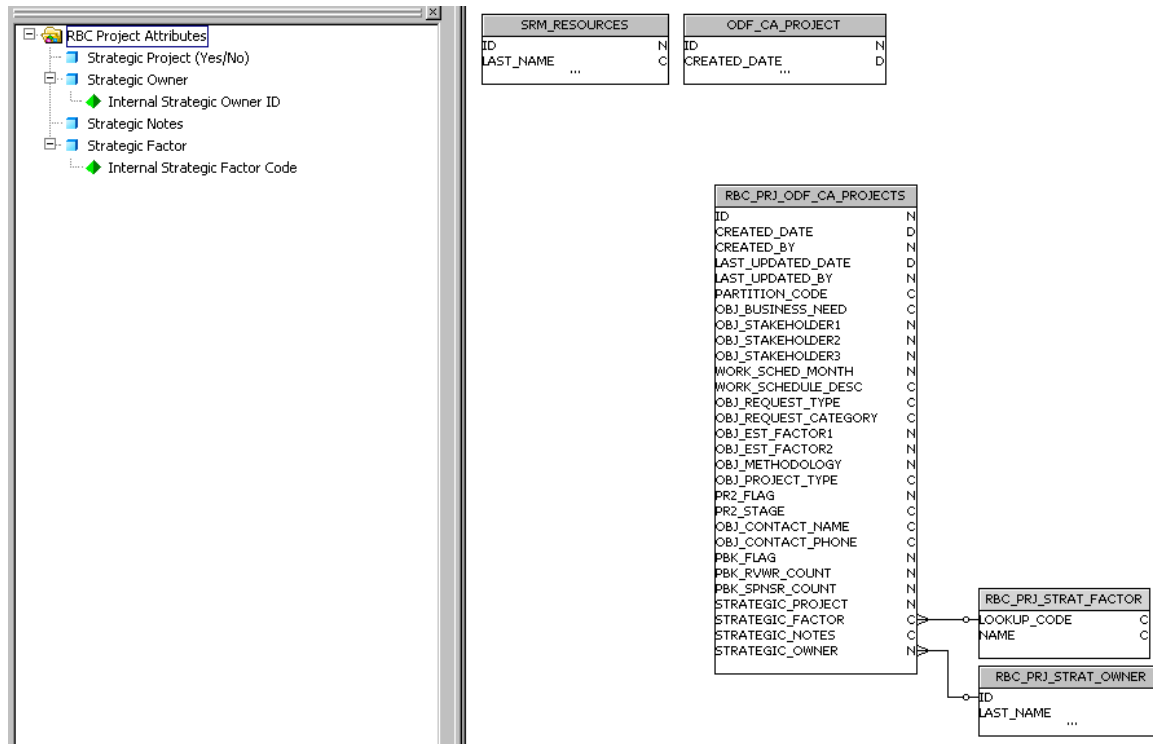
The screenshot shows a dialog box titled "Edit Properties of Strategic Factor2" with a close button (X) in the top right corner. It has five tabs: "Definition", "Properties", "Advanced", "Keys", and "Source Information". The "Properties" tab is selected. Inside the dialog, there is a "Name:" label with a text box containing "Internal Strategic Factor Code". To the right is a "Type:" label with a dropdown menu showing "Character". Below these is a "Description:" label with a large text area containing "Internal Strategic Factor Code". At the bottom is a "Select:" label with a text box containing "RBC\_PRJ\_ODF\_CA\_PROJECTS.STRATEGIC\_FACTOR".

- Make it a detail of Strategic Factor

The screenshot shows the same dialog box, but with the "Advanced" tab selected. The "Qualification" section is visible, with the text "This object has the following qualification for multidimensional analysis:". Below this are three radio buttons: "Dimension" (unselected), "Measure" (unselected), and "Detail" (selected). Below the radio buttons is the text "This detail object gives additional information on the following dimension:". Underneath is the "Associated Dimension:" label with a dropdown menu showing "Strategic Factor (RBC Project Attr)". At the bottom left, there is a checked checkbox labeled "Associate a List of Values". At the bottom right, there is an unchecked checkbox labeled "Allow users to edit this list of values".

# modify a custom universe

## – Snapshot of the Universe



## – Export the universe to the Business Objects CMS ‘ppmlabcaw10’

# link universes

- Create a new blank universe
  - Used to hold link points
- Use CA\_Clarity connection
- Set ANSI92 = Yes
  - More flexibility



**Universe Parameters**

Definition | Summary | Strategies | Controls | SQL | Links | Parameter

The following information identifies the universe. A universe is defined by its name and database connection:

Name: RBC Project Universe

Description: RBC Project Universe

Connection: CA\_Clarity

New... Edit... Test

OK Cancel Help

**Universe Parameters**

Definition | Summary | Strategies | Controls | SQL | Links | Parameter

Parameter

Name	Value
ANSI92	No
AUTO_UPDATE_QUERY	No
BLOB_COMPARISON	No
BOUNDARY_WEIGHT_TABLE	-1
COLUMNS_SORT	No
COMBINED_WITH_SYNCHRO	No

Property

Name	Value
ANSI92	Yes

Add Replace Remove

# link universes

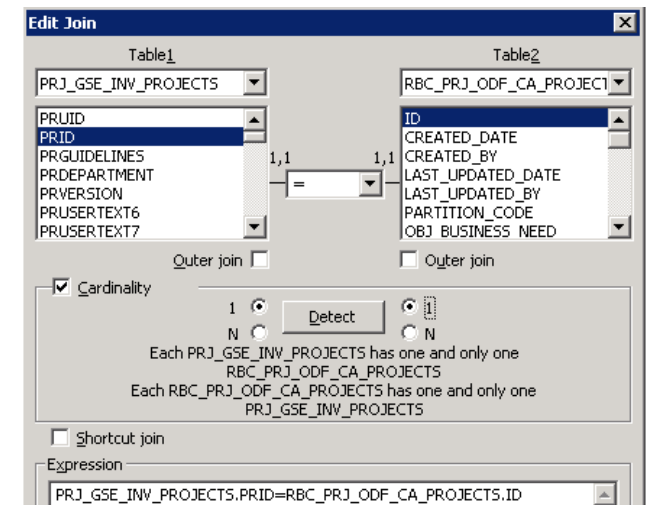
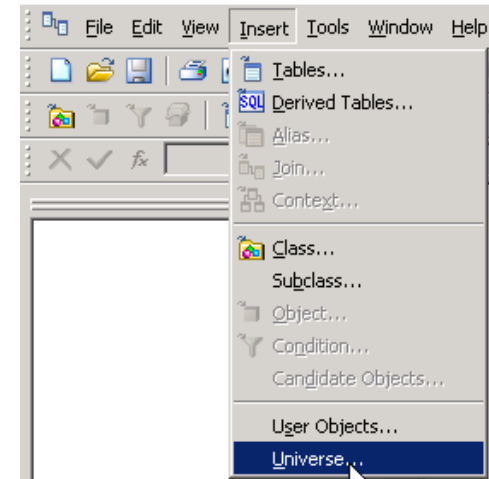
## – Go to Insert, Universe

- Choose Projects – Oracle.unv
- Repeat and choose RBC Project Attributes (DO NOT USE).unv

## – Go to Insert, Join

- Prj\_gse\_inv\_projects.prjID = prj\_odf\_ca\_projects.id
- Inner Join
- 1 to 1 Cardinality

## – Export the universe



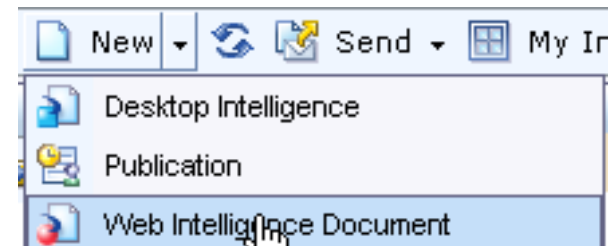
# create a WEBI document

## – Bring up your browser

- <http://ppmlabcaw10:8080/businessobjects/enterprise115/desktoplaunch/InfoView/logon/logon.do> or Favorites, InfoView
- System: **ppmlabcaw10**
- User: **administrator**
- Password: **Claritybo**
- Authentication: **Enterprise**

## – Go to New, Web Intelligence Document

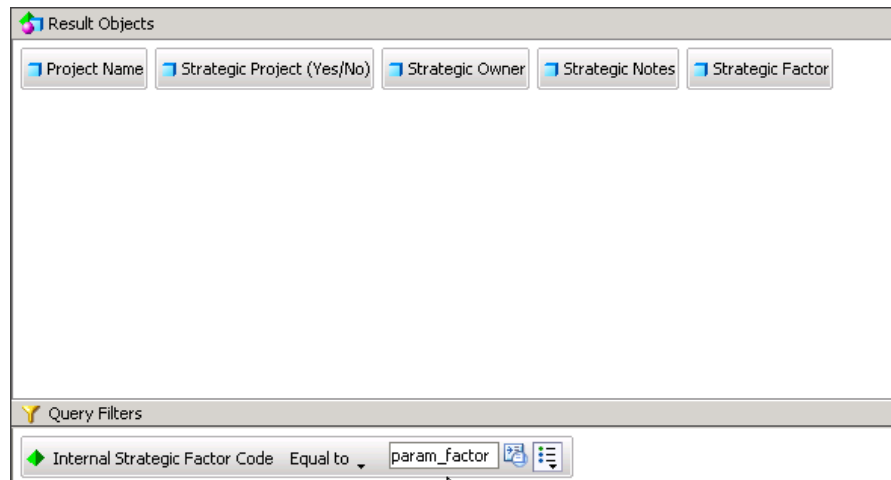
- Choose 'RBC Project Universe'



# create a WEBI document

## – Build your query

- Drag Project Name, Strategic Project, Strategic Owner, Strategic Notes, and Strategic Factor into the Result Objects panel
- Drag Internal Strategic Factor Code into the Query Filters panel
- Set filter 'Equal to'
- Change to 'Prompt'
- Rename to param factor



# create a WEBI document

## – Run Query

- Choose 'Cost' for param\_factor
- Change report title to 'RBC Strategic Projects'
- Expand 'Strategic Notes' field

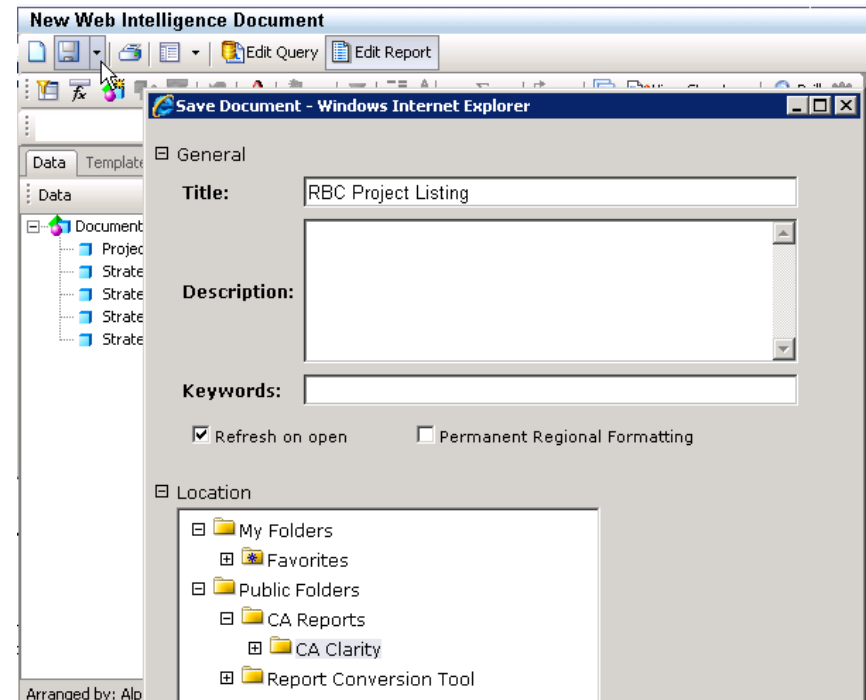
### RBC Strategic Projects

Project Name	Strategic Project (Yes/No)	Strategic Owner	Strategic Notes	Strategic Factor
Automated Security	Yes	Amos, Cheryl	Requires Less Personnel	Cost Savings
Client Services Data	Yes	Anderson, Patricia	Better decision making with the increase	Cost Savings
Compliance Audit - S	Yes	Anderson, Patricia		Cost Savings
Credit Card Security	Yes	Amos, Cheryl	Less Fraud	Cost Savings
HR Claims Processin	Yes	Anderson, Patricia	More efficient system	Cost Savings
Online Order Entry	Yes	Amos, Cheryl	Employ fewer Order Entry personnel	Cost Savings



# create a WEBI document

- Save the WEBI document
  - RBC Project Listing
  - Check 'Refresh on Open'
  - Save under Public Folders/CA Reports/CA Clarity
- Document can now be added to CA Clarity



# add report to CA Clarity PPM

- Go into Clarity
  - <http://localhost> or Favorites, CA Clarity PPM Login
  - admin/caw
- Administration, Reports and Jobs
  - Add report definition

Job Definition: Properties (Job Definition: )

**Properties** ➔

Parameters ☐

Parameter Order ☐

Incompatible Jobs ☐

Associated Categories... ☐

**Access to this Job**

▶ Full View ☐

▶ Resource ☐

▶ Group ☐

▶ OBS Unit ☐

➔ = Current  
☐ = Available  
☐ = Not Yet Available

**Job Definition Name** RBC Strategic Projects

**Job Definition ID** RBC\_STRATEGY

**Content Source** Customer

**Description** RBC Strategic Projects

Active ☒

Executable Type Report

**Executable Name** RBC Project Listing  
(Enter the report title)

Save and Continue Save and Exit Cancel

\* = Required + = Enter Once # = Unique

Must match (case sensitive)

**Save Document - Microsoft Internet Explorer provided by CA**

**General**

**Title:** RBC Project Listing

**Description:**

**Keywords:**

☒ Refresh on open ☐ Permanent Regional Formatting

**Location**

My Folders

Favorites

Public Folders

CA Reports

CA Clarity

# add report to CA Clarity PPM

## – Add the parameter

- Bind Parameter Code must match the WEBI document parameter
- Browse uses GD\_STRATEGIC\_FACTOR
- Parameter is required



**Parameter** ( Report Definition: RBC Strategic Projects )

**Parameter Label** Strategic Factor

**Bind Parameter Code** param\_factor  
( Enter one word containing letters. )

**Type** Pull-down

**Lookup Style**  
☒ Single-select  
☐ Multiple-select

**Pull-down**  

**Default** [--Select--]  
( Click Save to update this field after selecting a new p )

**Required** ☐

**Read-only** ☐  
( In order to make a parameter read-only a default must )

Save Submit Submit and Create New Cancel

\* = Required + = Enter Once # = Unique

**CA Clarity PPM :: Select Lookup - Windows Internet Explorer**

**Clarity™ PPM**

**Select Lookup**

**Filter**

Lookup

ID GD

Description

Source [-- Select --]

Filter Show All Clear

Lookup	ID	Description	Source
<input checked="" type="checkbox"/> Strategic Factor	GD_STRATEGIC_FACTOR	Strategic Factor	Static List

Total Results: 1

Add Close

# add report to CA Clarity PPM

- Go to your home page, Reports and Jobs
  - Run RBC Strategic Projects
    - Choose Cost Savings

The screenshot shows the 'Report Properties' form in CA Clarity PPM. The left sidebar contains navigation links: Personal (Overview, Organizer, Knowledge Store, Timesheets Review, Timesheet Review, Timesheets), Reports and Jobs (Account Settings), Reporting (My Portlets, My Dashboards), Dashboards (Demand Center, Project Center, Resource Center, Governance Center), and PRINCE2™ Management Controls (Reports). The main form area is titled 'Report Properties ( Report Type: RBC Strategic Projects )'. It includes a 'General' section with a 'Report Name' field set to 'RBC Strategic Projects'. A 'Parameters' section has a 'Strategic Factor' dropdown menu with options: '-- Select --', '-- Select --', 'Cost Savings' (highlighted), 'Customer Reference', and 'Revenue Generating'. A 'When' section has a 'When' checkbox checked for 'Immediately' and an unchecked 'Scheduled' option. Below this are fields for 'Start Date', 'Start Time' (with 'Hour' and 'Minute' dropdowns), and 'Recurrence' set to 'Run Once' with a '[Set Recurrence]' link.

# summary

## a few words to review

- Key topics
- Findings
- Results
- Experiences

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# Q&A



# related sessions

SESSION #	TITLE	Date / Time
PP302SN	Getting started with BO WEBI reports and custom universe within CA Clarity PPM	05/17/10 at 2:30 p.m.
PP313SN	Learn from the Business Objects Expert: Maximize your reports with BO Server R3	05/19/10 at 3:45 p.m.
PP505LS	Hands-on lab: Using BO with CA Clarity PPM (repeat of this lab)	05/20/10 at 11:30 a.m.

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- After completing your session evaluation form, place it in the basket at the back of the room

thank you