

Jaspersoft Report, Dynamic Linking from CA PPM List View

Version 1.0

Revision Date: 02/03/2017

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Document Revision History

Version	Revision Date	Reason for Change	Revised By
1.0	2/3/17	First Revision	Darren Greer

Business Objectives

The ability to link directly to a Jaspersoft Report from a CA PPM Object's list view, dynamically passing the Object ID being referenced from. E.g. Idea List view contacts a link for each Idea, which can be linked from to a Jaspersoft Report, passing the Idea object ID in the process.

Target Audience

1. All CA PPM Clients

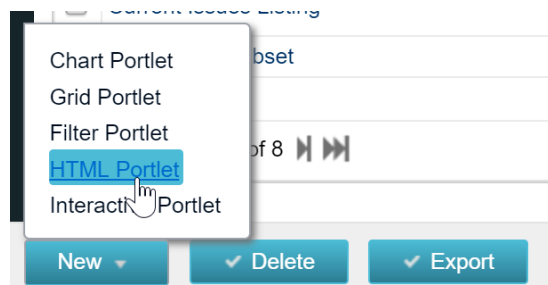
Assumptions

- A Jaspersoft Report has already been developed
- Said Jaspersoft Report accepts a Parameter named "projectKey_1"

Step by Step Instructions

Step 1 – Create HTML Portlet

- Start by creating a new HTML Portlet:



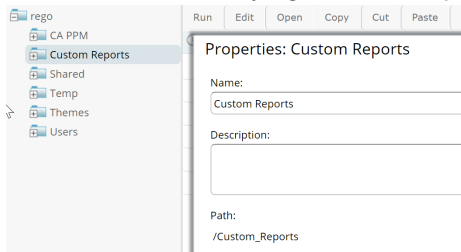
- Place the following code inside the HTML Code section of the portlet:

```
<div>
  <iframe id="ideaForm" style="width:100%;height:600px;" frameborder="0" border="0" src=""></iframe>
</div>

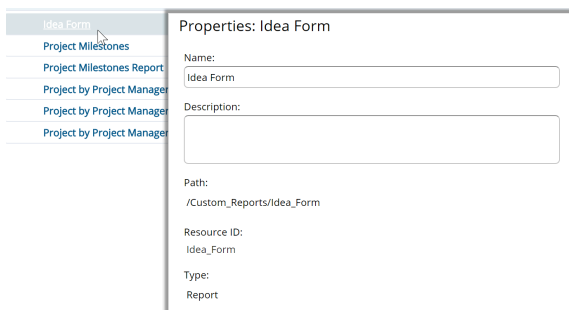
<script>
var str = window.location.href;
var key = "";
vars = str.split("&");
for (var i=0;i<vars.length;i++) {
  var pair = vars[i].split("=");
  if (pair[0] == "projectKey_1") {
    key = pair[1];
  }
}
document.getElementById('ideaForm').src =
'reportservice/flow.html?_flowId=viewReportFlow&standAlone=true&decorate=no&ParentFolderUri=<FOLDERPATH>&re
portUnit=<REPORTPATH+ID>&projectKey_1=' + key;
</script>
```

Requirements – Jaspersoft Report, Dynamic Linking from CA PPM List View

- Replace <FOLDERPATH> with the path of the folder in the Jaspersoft Repository which can be viewed by right-click and properties on the folder:

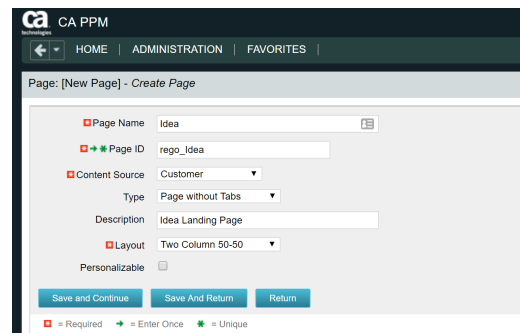


- Replace <REPORTPATH+ID> with the path and ID of the folder/report in the Jaspersoft Repository which can be viewed by right-click and properties on the report:

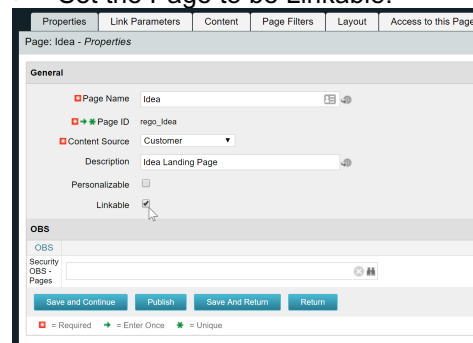


Step 2 – Create Portlet Page

- Next, create a Portlet Page to house the newly created portlet:



- Save and Continue
- Set the Page to be Linkable:



Requirements – Jaspersoft Report, Dynamic Linking from CA PPM List View

- Create a new Link Parameter to match the parameter mentioned in assumptions:

Page: Idea - Link Parameter

Parameter Name
(The parameter label that the administrator will see when linking to this page from an object or portlet)

Parameter ID
(This ID will be used in the URL when calling this page)

☐ = Required ☐ = Enter Once ☐ = Unique

- Add the previously created HTML Portlet to the Content of the Page:

CA PPM

HOME | ADMINISTRATION | FAVORITES

Properties | Link Parameters | Content | Page Filters | Layout | Access to this Page

Page: Idea - Content

There is no content to display. Click Add to add content.

Select Content

Title

Content ID

Category

Description

Type

<input type="checkbox"/>	Content	ID	Type	Category	Description
<input checked="" type="checkbox"/>	Idea Form	rego_ideaForm	Html	Project	Idea Form To Embed Idea Report
<input type="checkbox"/>	Idea Form	pma_ideaPortlet	Restricted	Business Intelligence	Idea portlet

Displaying 1 - 2 of 2

- Save and Return

CA PPM

HOME | ADMINISTRATION | FAVORITES

Properties | Link Parameters | Content | Page Filters | Layout | Access to this Page

Page: Idea - Content

No Maximized Portlet

<input type="checkbox"/>	Content	Category	Description	Maximized	Active
<input checked="" type="checkbox"/>	Idea Form	Project	Idea Form To Embed Idea Report	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Displaying 1 - 1 of 1

Step 3 – Modify CA PPM Object

- Next, the Idea Object needs to be modified – Go to Admin -> Object -> Idea

CA PPM

HOME | ADMINISTRATION | FAVORITES

Properties | Attributes | Linking | Actions | Views | Audit Trail | Access to this Object

Object: Idea - Properties

Object Name Idea

Object ID idea

Content Source niku.com

Description The Idea Object which is used to create Investment Objects

Master or Subobject Master

Partition Model

Subobject

Master Object

Event Enabled ☒

Include in the Data Warehouse ☒

Save Save And Return Return

Required Enter Once

- In the Linking tab, select New:

CA PPM

HOME | ADMINISTRATION | FAVORITES

Properties | Attributes | Linking | Actions | Views | Audit Trail | Access to this Object

Object: Idea - Linking

Link Name	Action	Link to the Idea Property Page
Generate Status Report	pma.ideaProperties	Link to the Idea Property Page
Idea Value Metrics Link	projectpack.generatedStatusReport	Link that will generate a Status Report for the selected object
Idea Value Metrics Link	SubPage.5020101.actionLink	Idea Value Metrics Link

New Delete Return

- Create the new Link, and set it to link to the Page created in Step 2:

CA PPM

HOME | ADMINISTRATION | FAVORITES

Object: Idea - Link Settings

Link Name Idea Report

Link ID ideaReport

Description

Action

Save And Return

Required Enter Once

- The Link Parameter should manifest after selecting the Page, which can then be set to Object Internal ID

CA PPM

HOME | ADMINISTRATION | FAVORITES

Object: Idea - Link Settings

Link Name Idea Report

Link ID ideaReport

Description

Action Idea

projectKey_1 Object Internal ID

Save And Return Return

Required Enter Once Unique

Requirements – Jaspersoft Report, Dynamic Linking from CA PPM List View

- Next, create a new Attribute on the Idea Object:

Material Transaction Cost Source	
Material Transaction Rate Source	
Object	Code that identifies the object
Objective	
Open for Time Entry	Open for Time Entry
Organizational	Attribute created due to OBS Association
Originating Idea	Originating Idea (Converted)
Originating Requestor	Originating Requestor
Override Value for Reinvestment Rate	
Override Value for Total cost of Capital	

New Delete Deactivate Include in Data Warehouse Exclude from Data Warehouse Return

- Name the attribute Report Flag, Data Type Boolean, enable Default Value, set to Read-Only and modify the icon to be “Grid with Plus”

CA PPM

Object: Idea | Attribute: Report Flag - Object Attribute

General

Attribute Name: Report Flag

Attribute ID: reg_reportFlag

Description:

Data Type: Boolean

Default Value: ☒

Populate Null Values with the Default: ☒

Presence Required: ☐

Read-Only: ☒

Include in the Data Warehouse: ☐

Display Mappings

Type: Icon

Icon	Description	Value
Grid with Plus	Checked	<input checked="" type="checkbox"/>

Save Save And Return Return

Required Enter Once Unique

- On the Views tab, select Layout for the Idea List:

CA PPM

Object: Idea - Views

View	Category
Idea Properties	Properties [Layout: Create] [Layout: Edit] [Actions Menu]
Idea List	List Column [Layout] [Options] [Aggregation] [Actions Menu]
Idea Filter	List Filter [L&F_JIT]

Publish Restore Defaults Return

- Add the Report Flag attribute and Save and Return:

CA PPM

Object: Idea | Partition: System | View: Idea List - List Column Layout

Column Layout

Available Columns:

- Portfolio Category 1
- Portfolio Category 2
- Portfolio Category 3
- Portfolio Category 4
- Priority
- Progress
- Report Flag
- Regulatory Compliance
- Required
- Roll
- Score

Selected Columns:

- Idea Type
- Idea Category
- Idea Priority
- Start Date
- Planned Cost
- Planned Benefit
- Planned NPV
- Planned ROI
- Status
- Report Flag

Column Sorting

Sort By	Column	Direction
First Field	Idea Type	Ascending
Second Field	Idea Category	Ascending
Third Field	Subject	Ascending
Fourth Field	[Select]	Ascending

Save Save And Return Return

- On the Views tab, select Fields for the Idea List:

CA PPM

Object: Idea - Views

View	Category	Setup	Field	Modified
Idea Properties	Properties	[Layout: Create] [Layout: Edit] [Actions Menu]	[Field]	
Idea List	List Column	[Layout] [Options] [Aggregation] [Actions Menu]	[Field]	<input checked="" type="checkbox"/>
Idea Filter	List Filter	[Layout]	[Field]	<input checked="" type="checkbox"/>

Publish Restore Defaults Return

Requirements – Jaspersoft Report, Dynamic Linking from CA PPM List View

- Open the Properties for the Report Flag field:

The screenshot shows the 'CA PPM' Administration interface. The breadcrumb trail is 'HOME | ADMINISTRATION | FAVORITES'. The page title is 'Object: Idea | Partition: System | View: Idea List - List Column Fields'. Below the title, there are filters for 'Show: All' and 'Display: Selected', with a 'Go' button. A table lists various fields with a 'Column Label' icon next to each. The 'Report Flag' field is highlighted with a mouse cursor. At the bottom, there are buttons for 'New', 'Save', 'Save And Return', and 'Return'. A legend indicates that a red square icon means 'Required'.

- Set Display Type to Image, Alignment to Center, Link to previously created link, and check Open as Pop-up:

The screenshot shows the 'CA PPM' Administration interface, specifically the 'General' properties for the 'Report Flag' field. The breadcrumb trail is 'HOME | ADMINISTRATION | FAVORITES'. The page title is 'Object: Idea | Partition: System | View: Idea List - List Column Field'. The 'Attribute' is 'Report Flag'. The 'Data Type' is 'Boolean'. The 'Column Label' is 'Report Flag'. The 'Show Column Label' checkbox is unchecked. The 'Display Type' is set to 'Image'. The 'Decimal Places' is set to '[-Select-]'. The 'Secondary Value' is set to '[-Select-]'. The 'Alignment' is set to 'Center'. The 'Column Width' is set to '5%'. The 'Allow Word Wrapping in Column Header' checkbox is unchecked. The 'Allow Word Wrapping in Column' checkbox is checked. The 'Link' is set to 'Idea Report'. The 'Open as Pop-up' checkbox is checked. The 'Disable Link Attribute' is set to '[-Select-]'. A note states: '(The attribute column value link will be disabled, if the Disable Link Attribute value is zero or null)'. At the bottom, there are buttons for 'Save', 'Save And Return', and 'Return'. A legend indicates that a red square icon means 'Required'.

Step 4 – View Results

- Test the flow by navigating to the Idea List:

Ideas										
Filter: System Default										
	Subject	Idea Type	Idea Category	Idea Priority	Start Date	Planned Cost	Planned Benefit	Planned NPV	Planned ROI	Status
	New Online Application	Application Change	COTS Evaluation		9/1/16	370,000.00	700,000.00	330,000.00	89.19%	Approved
	Security Enhancements	Application Change	Enhancement		10/1/16	50,000.00	70,000.00	20,000.00	40.00%	Unapproved
	Datamart Performance Upgrade	Infrastructure Deployment	Distributed		11/1/16	400,000.00	925,000.00	525,000.00	131.25%	Unapproved
	AP Architecture Consolidation	Infrastructure Deployment	Network/Telecom		11/1/16	500,000.00	1,800,000.00	1,300,000.00	260.00%	Submitted for Approval
	Network Monitoring Upgrade	Infrastructure Deployment	Network/Telecom		1/1/17	450,000.00	550,000.00	100,000.00	22.22%	Unapproved
	Cloud Computing Enhancements	Major Project	New Development		1/1/17	500,000.00	950,000.00	450,000.00	90.90%	Approved
	Email archival repository	Major Project	New Development		9/1/16	380,000.00	550,000.00	170,000.00	44.74%	Approved
	Green IT Initiative	Major Project	New Development		10/1/16	1,400,000.00	3,500,000.00	2,100,000.00	150.00%	Approved
	On Demand Portal for PPM Product	Major Project	New Development		10/1/16	200,000.00	350,000.00	150,000.00	75.00%	Approved
	Online Order Improvements	Major Project	New Development		12/1/16	850,000.00	750,000.00	100,000.00	15.38%	Unapproved

- Note the icon on the far right (Grid with Plus)
- Click on the icon, which should navigate to the created Portlet Page / HTML Portlet setup in the previous steps, passing the appropriate Parameter, which can then be used in the Jaspersoft Report to display relevant details:

CA PPM

CA PPM Administrator Logout Help About

HOME ADMINISTRATION FAVORITES

Idea

Idea Form

Idea Form Data refreshed Feb 3, 2017 at 9:13:29 AM

regocconsulting

Idea Form

4G Upgrade Readiness

Sponsor

Request Type

Strategic Goal

Cost Estimate

Planned Cost

Request Completion Date

Rivera, Alex

Major Project

Infrastructure Improvement

179,960

179,960

9/1/16/2017

4G Upgrade Readiness

Description