

# CA Business Intelligence (CABI) for the Business, using Designer and Universe to empower your non-technical CA Service Desk Manager (SDM) users

Presented By:

Vinod Subburaj

CA Technologies Support



# Welcome

## Webinar Three in Seven-Part Series on using CABI with SDM

- Diane Boyd, CA Education Moderator
- Series runs through May 17
- 1 hour sessions, except 5/15, which is 1.5 hr sessions

Simplifying  
Installation &  
Configuration of  
CABI and SDM

TODAY – 11 –  
12:30 EDT

Using LDAP to  
Secure Your CA  
Service Desk  
Manager  
Reporting Access

Thursday, May 3  
11 – 12 EDT

Using Designer  
and Universe to  
Empower non  
Technical End  
Users

Tuesday, May 8  
11 – 12 EDT

Personalizing  
your Web  
Reports with  
Infoview

Thursday, May 10  
11 – 12 EDT

Maximize your  
Engines with  
Offline Reporting

Tuesday, May 15  
11 – 12:30 EDT

Reporting  
Troubleshooting  
Tips: Part I





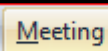
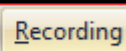



Wednesday, May  
16 – 11 – 12 EDT

Reporting  
Troubleshooting  
Tips: Part 2

Thursday, May 17  
11 – 12 EDT

# Logistics

## Logistics

1	Download handouts   Feedback: 
2	Submit questions to Q/A folder; conduct Q/A at end of session   
3	Twitter users can tweet using - #CABITips
4	Report issues during the session using Live Meeting Chat or   Feedback: 
5	Session is being recorded and available after session via email
6	Provide feedback via post evaluation survey sent through email
7	Lines are muted

# Using Designer & Universe to Empower CA SDM Users

## Meet the CA BI/SDM Subject Matter Experts

### Vinod Subburaj

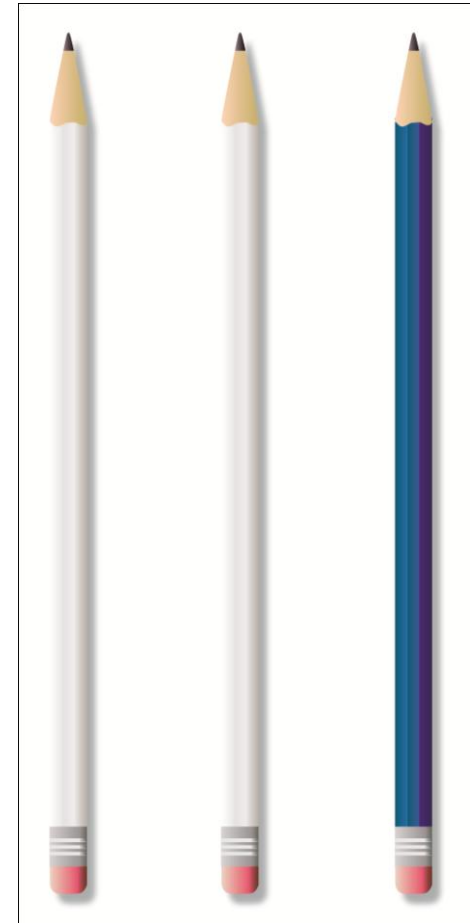


- Sr. Support Engineer based in Hyderabad, India
- Joined CA 6 years ago
- Working with CA Service Desk Manager since joining
- Master's Degree in Computer Application
- Enjoys playing Tennis and Cricket

# Using Designer & Universe to Empower CA SDM Users

## Webinar Summary

*This session will cover Designer and Universe fundamentals, and show how CA Service Desk Manager exploits that functionality to create a Derived Universe, import CA SDM schema changes into CABI, and create new CABI Documents.*



# Using Designer & Universe to Empower CA SDM Users

## Webinar Objectives

### After this Module you will:

- Understand the Reporting Components
- Know the fundamentals of Universe and Designer
- Work with CA SDM Universe Using Designer
- Create Derived Universe Import Schema Changes
- Use CA Service Desk Manager Attributes Aliases
- Set restrictions via Universe Security
- Create Web Intelligence Report using Derived Universe

### Why you need to know

- Create custom objects
- Benefit of Derived Universe
- Setup restrictions
- How to create Custom Reports



# Using Designer & Universe to Empower CA SDM Users

## Webinar Map

1

CABI Reporting Components

2

Fundamentals of Universe & Designer

3

CA Service Desk Manager Universe

4

Universe Security



# Using Designer & Universe to Empower CA SDM Users

## Reporting Components

### #CABITips

### Operational Components

- Reporting Database
  - SQL Server/Oracle CA SDM Database
  - Accessed by Crystal Reports and WEBI
  - ODBC Driver -> Object manager(DOMSRVR)
- Central Management Server (CMS)
  - Store objects used in reporting process
- Central Management Console (CMC)
  - Main administrative facility for CABI
  - Access to all CABI administrative functions
    - Deploy reports and
    - Assign Folder Permissions for user access





# Using Designer & Universe to Empower CA SDM Users Reporting Components

## Reporting Component Tools

- Universe
  - Data Warehouse or Transactional Database
  - Describe classes (tables) & objects (columns)
- Designer
  - Tool to modify the CA SDM Universe
    - Meta layer between CA SDM and CABI reporting
- Default pre-defined reports
  - Web based CA SDM and CA Knowledge Tools
  - Report developed either WEBI or Crystal
  - Can be used as model site specific

**NOTE:** The CA SDM Universe is installed and configured during CABI configuration. At the completion of configuration the universe connection is assigned to various users and group in CA Service desk.



# Simplifying the installation and configuration of CABI Reporting Components

#CABITips

## Reporting Component Tools

- \*Infoview
  - Web-based interface to predefined reports
    - View , run, schedule
    - Reports contained in folder in the public section
- Ad Hoc Reports
  - Created and administered from Infoview
    - Use WEBI plug-in based interface
  - Intended for users to create basic report easily
    - without writing queries
  - Stored in MY Folder / Favorites folder structure

\*Infoview will be covered in-depth in an upcoming Webinar in this series:

***Personalize your CA Service Desk Manager Web Intelligence Reports with CA Business Intelligence (CABI) Infoview***



# Using Designer & Universe to Empower CA SDM Users InfoView

The screenshot displays the CA InfoView web interface. At the top is a navigation bar with links: Home, Document List, Open, Send To, Dashboards, Help, Preferences, About, and Log Out. Below the navigation bar, the user is greeted with 'Welcome: Administrator'. The main content area is divided into two columns: 'Navigate' and 'Personalize'. The 'Navigate' column contains a description: 'View your Inbox, Favorites, or Document Lists. Use the Help to learn more about InfoView.' and a list of links: Document List, My Favorites, My Inbox, Information OnDemand Services, and Help. A red arrow points to the 'Document List' link. The 'Personalize' column contains a description: 'Change your InfoView start page, viewing options, and preferences for daily tasks.' and a link to 'Preferences'.

Home | Document List | Open | Send To | Dashboards | Help | Preferences | About | Log Out

Welcome: Administrator

## Navigate

View your Inbox, Favorites, or Document Lists. Use the Help to learn more about InfoView.

- Document List
- My Favorites
- My Inbox
- Information OnDemand Services
- Help

## Personalize

Change your InfoView start page, viewing options, and preferences for daily tasks.

- Preferences

# Using Designer & Universe to Empower CA SDM Users Infview

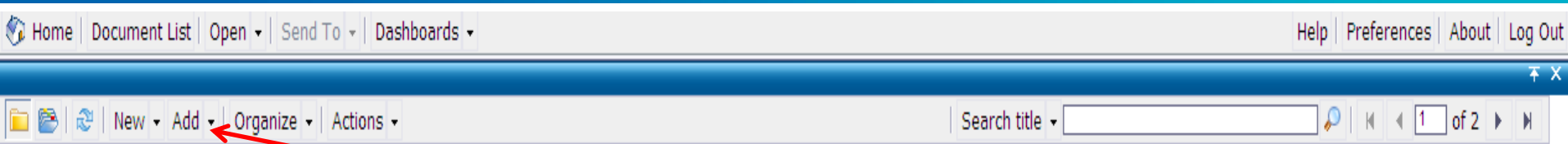
Home | Document List | Open | Send To | Dashboards | Help | Preferences | About | Log Out

New | Add | Organize | Actions | Search title | 1 of 2

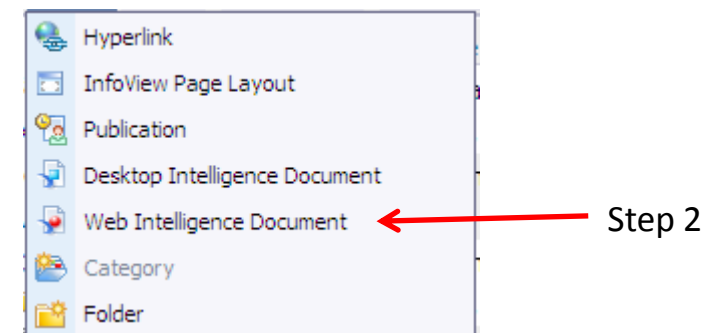
	Title ^	Last Run	Type	Owner	Instances
	Created Configuration Items Report-Detail This report displays all newly Created Configur		Web Intelligence Report	Administrator	0
	Dashboard Re-Categorized Incidents		Crystal Report	Administrator	0
	Dashboard-Detailed Incident Source This report displays list of incidents recorded in		Web Intelligence Report	Administrator	0
	Deleted Configuration Items Report-Detail This report displays all details of Deleted (marked Inactive) Configuration Items within sp		Web Intelligence Report	Administrator	0
	Detailed Incident This report displays list of incidents recorded in		Web Intelligence Report	Administrator	0
	Detailed Incident Source This report displays list of incidents recorded in		Web Intelligence Report	Administrator	0
	Detailed Incident Source for Category		Web Intelligence Report	Administrator	0
	Detailed Resolution Report		Web Intelligence Report	Administrator	0
	Incident by Category Dashboard components		Web Intelligence Report	Administrator	0
	Incident by Hardware Model-Detail This report displays details of all the closed inci		Web Intelligence Report	Administrator	0
	Incident Categories without Service Type- Detail This report cannot be viewed independently, as		Web Intelligence Report	Administrator	0
	Incident Resolution Report Dashboard		Web Intelligence Report	Administrator	0
	Incident Resolution Report Details Dashboard		Web Intelligence Report	Administrator	0
	Incidents by Hardware Model-DB This report displays closed Incidents that do no		Web Intelligence Report	Administrator	0
	Incident by Category Dashboard Details Report		Web Intelligence Report	Administrator	0

Total: 18 objects

# Using Designer & Universe to Empower CA SDM Users Infoview



Step 1



Step 2



**Module 3: CABI for the Business, using Designer and Universe to empower your non-technical CA SDM users**

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# Using Designer & Universe to Empower CA SDM Users Infview

The screenshot displays the CA SDM Designer & Universe interface. The top menu bar includes Home, Document List, Open, Send To, Dashboards, Help, Preferences, About, and Log Out. The main window is titled "New Web Intelligence Document" and features a toolbar with icons for Edit Query, Edit Report, Add Query, and SQL.

The interface is divided into three main sections:

- Data:** A tree view on the left showing the hierarchy of data objects. The "CA Service Desk" folder is expanded, revealing sub-folders like "Attached Service Type", "Audit Log", "Change", "Contact", "Incident", "Issue", "Key Performance Indicator", "Knowledge", "Lookup Tables", "Problem", and "Request". The "Request" folder is further expanded, showing a list of fields such as "Request Activity", "Request Analysis", "Request Detail", "Active", "Active Label", "Active Symbol", "Affected End User Combo Name", "Affected End User Last Name", "Affected End User Userid", "Assignee uuid", "Assignee Access Type Symbol", "Assignee Combo Name", "Assignee Last Name", "Assignee Location Name", "Assignee Organization Location Name", "Assignee Organization Name", "Assignee Schedule Symbol", "Assignee Timezone Symbol", "Assignee Userid", and "Base Template".
- Result Objects:** A pane on the right showing the selected fields "Active" and "Ref Num".
- Query Filters:** A pane at the bottom right with a text box stating: "To filter the query, drag predefined filters here or drag objects here then use the Filter Editor to define custom filters." Below this text is a funnel icon and a list of predefined filters.

At the bottom left, there is a "Query 1" tab. The bottom right corner contains navigation icons for back, forward, and search.

# Using Designer & Universe to Empower CA SDM Users

## Understanding Fundamentals of Universe & Designer #CABITips

The screenshot displays the Universe Designer application window titled "Universe Designer - CA Service Desk - [Administrator - @AU-DESNA01-01:6400]". The interface includes a menu bar (File, Edit, View, Insert, Tools, Window, Help) and a toolbar with various icons. On the left, the "Structure Pane" lists a hierarchy of classes: Attached Service Type, Audit Log, Change, Contact, Incident, Issue, Key Performance Indicator, Knowledge, Lookup Tables, Problem, Request, Request Activity, Request Analysis, and Request Detail. The "Universe Pane" shows a list of objects under the "Request" class, including Active, Active Label, Active Symbol, Affected End User Combo, Affected End User Last Name, Affected End User Userid, Assignee uid, Assignee Access Type Sy, Assignee Combo Name, Assignee Last Name, Assignee Location Name, Assignee Organization Name, Assignee Organization Name, Assignee Schedule Symbol, Assignee Timezone Symbol, Assignee Userid, Base Template, Base Template Id, Base Template Ref Num, Caextwf Instance Id, Call Back Date, Call Back Flag, Category, Category Symbol, and Caused By Change Order. The "Objects" section shows a list of objects: ADMIN\_TREE, ANI, BU\_TRANS, CI\_ACTIONS, CI\_ACTIONS\_ALTERNATE, CI\_BOOKMARKS, CI\_DOC\_LINKS, CI\_DOC\_TEMPLATES, CI\_DOC\_TYPES, CI\_PRIORITIES, CI\_STATUSES, and CI\_WF\_TEMPLATES. Red arrows point from the labels "Classes", "Structure Pane", "Universe Pane", and "Objects" to their respective elements in the screenshot.

**Classes**

**Structure Pane**

**Universe Pane**

**Objects**



# Using Designer & Universe to Empower CA SDM Users

## Understanding Fundamentals of Universe & Designer

### Universe is a file that contains

- Connection parameter for CA SDM Schema
- SQL structures named *objects*
  - Map to SQL structures in the database
    - Columns, Tables, & Database Functions
    - Objects are grouped in *classes*
    - Visible to Web Intelligence users
- Schema of tables/joins used in the CA MDB
  - Objects built from database structures
  - Only available to Designer users
  - Not visible to Web or Desktop Intelligence users



# Using Designer & Universe to Empower CA SDM Users

## Understanding Fundamentals of Universe & Designer

### What is a Connection?

- Link from the Universe to the ODBC Driver
- Existing or a new connection created for Universe
  - Use generic ODBC 3 data source for new



# Using Designer & Universe to Empower CA SDM Users

## Understanding Fundamentals of Universe & Designer #CABITips

### Classes and Objects

- *Class* is logical grouping of objects within Universe
  - Represents a category of objects
  - Name indicates the category of the objects
  - Can be divided hierarchically into *subclasses*
- *Object* is a named component
  - Maps to data or source of data in the database



# Using Designer & Universe to Empower CA SDM Users Infview

The screenshot displays the CA SDM Designer & Universe interface. The top menu bar includes Home, Document List, Open, Send To, Dashboards, Help, Preferences, About, and Log Out. The main window is titled "New Web Intelligence Document" and features a toolbar with icons for Edit Query, Edit Report, Add Query, and SQL. The interface is divided into three main sections:

- Data Properties:** A list of fields on the left, including Open Date, Orig User Dept, Orig User Cost Center, Outage End Time, Outage Start Time, Outage Type, Outage Reason Desc, Outage Detail Who, Outage Detail What, Outage Detail Why, Symptom Code, Target Closed Count, Target Closed Last, Target Resolved Count, Target Resolved Last, Target Hold Count, Target Hold Last, Target Start Last, Parent, Parent Ref Num, Pct Service Restored, Persistent Id, Predicted Sla Violation, Priority, Priority Description, Priority Enum, Priority Id, Priority Symbol, Priority Symbol Count, Problem, Problem Ref Num, and Ref Num. The "Ref Num" field is currently selected.
- Result Objects:** A section on the right showing two objects: "Active" and "Ref Num".
- Query Filters:** A section at the bottom with a text prompt: "To filter the query, drag predefined filters here or drag objects here then use the Filter Editor to define custom filters."

At the bottom left, there are two radio buttons: "Display by objects" (selected) and "Display by hierarchies".

# Using Designer & Universe to Empower CA SDM Users

## Work with CA Service Desk Manager Universe

### Designer Tool and WEBI

- Business Objects Designer Tool
  - Create and modify Universes
    - Web and Desktop Intelligence Users
  - Can use with the CA SDM Universe
- Web Intelligence requires a Universe for data access
  - Hides complexities of tables & objects
  - Provides business representation of data
    - Predefined data relationships
    - Selection criteria
    - Hierarchical aggregations
    - Measures
    - Calculations



# Using Designer & Universe to Empower CA SDM Users

## Work with CA Service Desk Manager Universe **#CABITips**

**In this Demo, we will See :**

How to Edit CA Service desk Manager Universe Connection parameters.



# Using Designer & Universe to Empower CA SDM Users

## Derived Universe

### The Business Objects Universe

- Meta-layer describes schema in CABI infrastructure
  - Custom Universe linked to CA SDM universe
  - Maintain schema changes with minimal effort
  - CA SDM provides upgrades to the base universe
- Default Universe is named "CA Service Desk"
  - Stored in "CA Universes" folder within CMC
  - Default universe is the "kernel" universe
    - Structure where universes are linked
  - Customer universe is the "derived" universe
    - Structure where universes are linked





# Using Designer & Universe to Empower CA SDM Users

## Derived Universe

### Import CA SDM Schema Changes into CABI

- Multiple Derived Universe Verify the following:
  - Maintain the z\_ naming convention
    - The Universe file name on all Universes tasks
  - Use the CA SDM Connection
    - Maintain Universe in CA Customer Universe folder
  - Do NOT delete link to default CA SDM Universe



# Using Designer & Universe to Empower CA SDM Users

## Attribute Aliases

### #CABITips

#### In this Demo, we will See :

- How to Create a Derived Universe to Import CA Service Desk Manager Schema Changes into CA Business Intelligence



# Using Designer & Universe to Empower CA SDM Users

## Attribute Aliases

### The CA Service Desk Manager Attribute Aliases

- CABI Universe populated via ODBC Driver
  - Access CA SDM Object layer
  - Access constrained by existing data partition
  - Access to user schema customization
- ODBC driver aware of the relationship in schema
  - Through Object links
- ODBC driver creates columns for Attribute Aliases
  - Provide flattened view of database
  - Ability to include column from related tables
    - SREL dotted relationship



# Attribute Aliases

## In this Demo, we will See :

- Adding an SREL field to the Universe
- Show the CR Attribute Aliases
- Create a new Attribute Alias
- Add the new fields to the derived Universe



# Using Designer & Universe to Empower CA SDM Users

## Universe Security

#CABITips

### CA Service Desk Manager Universe Security

- Security restrictions protect the default Universe
  - Web Intelligence reports may fail
- Limit access to the Universe Designer
  - Default group named CA Universe Developer
  - Administrator groups such as CA Reports Admin
  - Administrators cannot log in to the Designer
- Security limits modifications to the Universe
  - Add a User to the CA Universe Developer Group
  - Restrict Access to Universe Objects



# Using Designer & Universe to Empower CA SDM Users

## Universe Security

### In this Demo, we will See :

- Steps to Set Restriction from CA Service Desk Manager Universe.



# Using Designer & Universe to Empower CA SDM Users

## Creation of Custom Web Reports

### In this Demo, we will See :

- Create New Web intelligence Report From Derived Universe.





# Question and Answer Session

- Open Q/A folder
- Lines Unmuted
- Recording stopped
- Presenter answer questions in Q/A folder

# Closing

- Thank you, Vinod
- Watch for follow up email – link to session survey and session recording
- Additional Education  
<http://www.ca.com/us/collateral/learning-paths/na/CA-Service-Desk-Manager-Learning-Paths.aspx>

## CA Service Desk Manager r12.6 Learning Paths

Take charge of your path to success. Select a path based on your role, follow the suggested learning in the order we recommend, and also choose from common elective courses which suit your specific role. Where applicable, take advantage of accreditation exams focused on courses, and certification exams focused on bodies of knowledge.



Certification Exam

## •Next session

Simplifying Installation & Configuration of CABI and SDM  
TODAY – 11 – 12:30 EDT

Securing Reporting Access with LDAP  
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Using Designer and Universe to Empower non Technical End Users  
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Maximize your Engines with Offline Reporting  
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Reporting Troubleshooting Tips: Part I  
Wednesday, May 16 – 11 – 12 EDT

Reporting Troubleshooting Tips: Part 2  
Thursday, May 17  
11 – 12 EDT

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