

CA PPM 15.1: Building Custom Reports

300



PRODUCT RELEASE

CA Project & Portfolio Manager
15.1

COURSE TYPE, LENGTH & CODE

- Dynamic Labs
- Thirteen (13) Hours
- Course Code: 33CLR3083S

Course Overview

Having the right data at your fingertips is critical for making decisions in a software-driven business environment. Facilitating access to project-related data is a key focus of CA Project & Portfolio Manager 15.1 (CA PPM). By creating reports using the method that suits your experience and circumstance, you can assist your organization in meeting its business reporting goals.

This course will help simplify the report creation process and improve report performance. It will guide you through the steps to configure JasperSoft Studio to connect to CA PPM. You will also be taught several methods to create queries. Regardless of the method you adopt, you will be shown how JasperSoft Studio provides you with the means to quickly create a report from your query and how CA PPM enables you to add them to the Advanced Reporting interface. You will also be taught to schedule a report for distribution, assign appropriate permissions and rights to users, and modify default CA PPM reports. This training is based on CA PPM classic interface.

This class consists of 13 hours of SELF-DIRECTED learning including lab activities

What You Will Learn

- Write effective report queries using the method that suits your SQL coding experience.
- Create a report in JasperSoft Studio and publish it to automatically appear in CA PPM Advanced Reporting.
- Schedule reports for distribution to users who need them.
- Assign appropriate permissions and rights to users based on their role.
- Apply best practices to modify out-of-the-box (OOTB) CA PPM reports.

PREREQUISITES

- A working knowledge of the CA PPM 15.x core components, time management, and business administration
- A working knowledge of SQL
- A working knowledge of CA PPM and Jaspersoft report writing
- Third-party courses from TIBCO or equivalent knowledge:
 - Using Jaspersoft BI
 - Developing Reports with Jaspersoft Studio

WHO SHOULD ATTEND

- CA PPM Report Writer
- CA PPM Administrator
- Database Administrator

For Managers

With Jaspersoft Studio and the CA PPM data warehouse, getting management insights and business metrics is significantly simplified. After your team learns how to configure Jaspersoft Studio to connect to CA PPM, they will be taught the methods to create queries to suit their own requirements. This course will enable your staff to quickly create reports from their queries, add them to the Advanced Reporting interface in CA PPM, and schedule them for distribution to recipients.

Course Agenda

Module 1: Configure Jaspersoft Studio to Connect to CA PPM	Module 2: Build Custom Reports
<ul style="list-style-type: none"> ▪ Connect Jaspersoft Studio to CA PPM Advanced Reporting 	<ul style="list-style-type: none"> ▪ Create SQL report queries ▪ Create reports using Jaspersoft Studio ▪ Add reports to the CA PPM Advanced Reporting interface
Module 3: Perform Report-Related Tasks	Module 4: Perform Advanced Tasks
<ul style="list-style-type: none"> ▪ Schedule reports for distribution ▪ Assign users to Advanced Reporting access rights ▪ Modify an OOTB report 	<ul style="list-style-type: none"> ▪ Add cascading input controls ▪ Control logic in input controls using parameters ▪ Create reports with subreports ▪ Identify publishing and deployment considerations ▪ Identify migration limitations ▪ Implement reports in other languages ▪ Troubleshoot custom reports



Visit www.ca.com/education to explore the many course offerings, training options, and education solutions available to meet your skill development needs, budget, and travel requirements.