

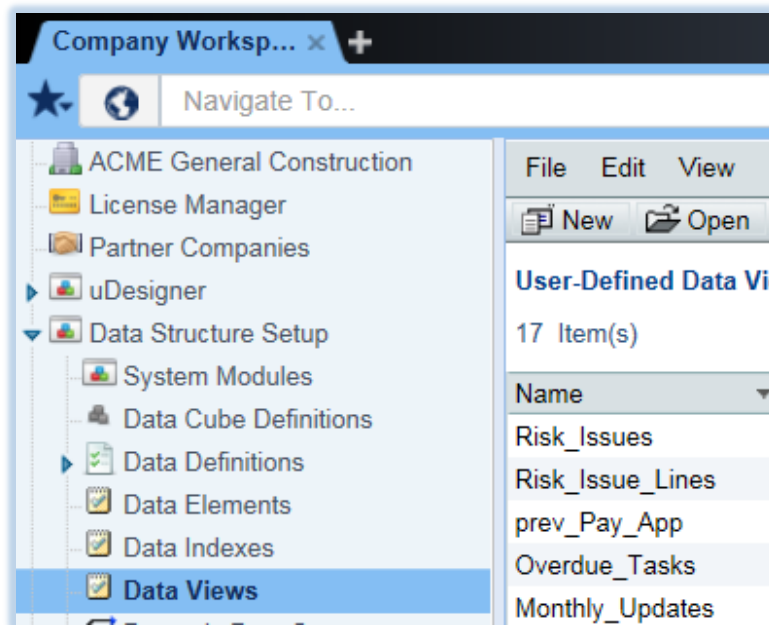
# TECH TIP

## USING A DATA VIEW IN A USER DEFINED REPORT (UDR) ORACLE PRIMAVERA UNIFIER

The following steps outline how to include a Data View for use in a UDR. There may be instances where using the default Data Elements tab does not expose enough of the data for a specific UDR. In a case like this a Data View can be used to extract the data.

This example is counting the number of projects included in a portfolio scenario sheet.

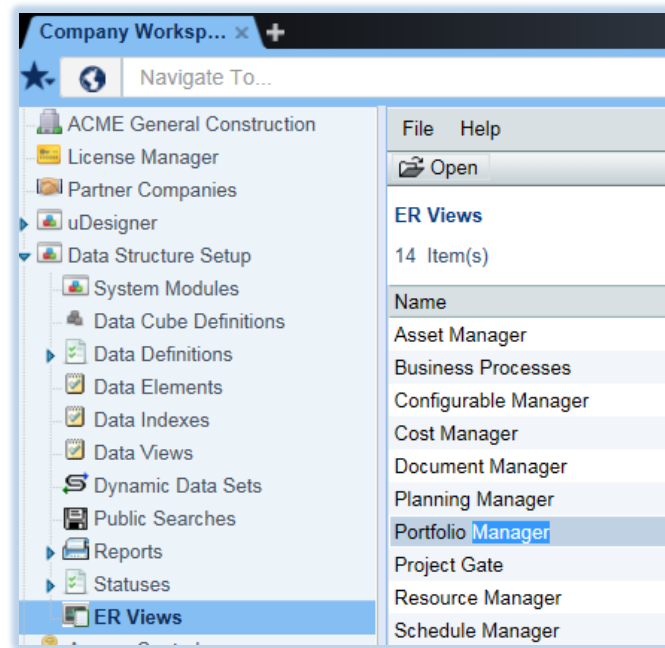
The Data View needs to be created. In the Company Workspace > Data Structure Setup> Data Views node, click 'New'.



The Data View will also require SQL. This is the code that allows querying of the Unifier database to extract the required data. (Please refer to a qualified consulting service if unfamiliar with how to write SQL code).

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

The SQL fields (Data Elements) are referenced from the Enterprise Views located in Company Workspace > Data Structure Setup > ER Views. This example uses Portfolio Manager Module data. Select Portfolio Manager from the ER log and click 'OK'.



The pop up window lists all the tables and views needed to extract data (Data Element information) from the Portfolio Manager. From this information the required SQL code can be written.

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

The screenshot shows the 'Entity Reference View' in Internet Explorer. The left pane lists various entities, including 'cfn\_ppm\_data', 'period\_structure', 'ppm\_approved\_data', 'ppm\_datasource', 'ppm\_plan', 'ppm\_plan\_projects', 'ppm\_ps', 'ppm\_scenarios', 'ucp', 'ucp\_perm', 'ucp\_planner\_data', 'ucp\_project\_data', 'ucp\_view', 'uxcp', 'uxcp\_perm', 'uxcp\_planner\_data', 'uxcp\_project\_data', and 'uxcp\_view'. The right pane displays the 'Capital Projects' table, which is a 'unifier\_ucp : TABLE' with the following fields:

Field Name	Definition	SQL Type	Label	Description
id		int	hidden	
record_no	Record Number Data	nvarchar(60)	Record Number	
title	Short Description Text	nvarchar(150)	Title	
due_date	Date Picker	datetime	Due Date	
end_date	Date Picker	datetime	End Date	
uuu_record_last_update_date	Date Picker	datetime	Record Last Update Date	
process_status		int	hidden	
status	ucp_status	nvarchar(60)	Status	
creator_id	User Picker	int	Creator	
project_id		int	hidden	

Once the appropriate tables, views and fields are identified, the SQL code can be written.

Enter appropriate Name and Label for the Data View. Enter the SQL that will be used to extract the required data and click 'OK'.

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

**Create a Data View**

Prefix:

Name:

Label:

Description:

SQL Definition: 

```
SELECT uu.ppm_name AS portfolio_name,
s.name AS scenario_name,
cp.uu.ppm_period_picker AS periodyear,
pd.projectname AS project

FROM unifier_ppm_scenarios s,
unifier_ppm_plan pl,
unifier_uhcp cp,
unifier_uhcp_planner_data pd

WHERE s.plan_id = pl.id
AND pl.id = cp.uu.plan_id
AND pd.scenario_id = s.id
```

With the Data View selected, click Status > Published.

Note - If there are any errors in the SQL the Data View will not get published.

Company Worksp... x +

Navigate To...

ACME General Construction

License Manager

Partner Companies

uDesigner

Data Structure Setup

System Modules

Data Cube Definitions

Data Definitions

Data Elements

Data Indexes

**Data Views**

File Edit View Help

New Open Data Metadata Status Usage

User-Defined Data Views - Current View: All

18 Item(s)

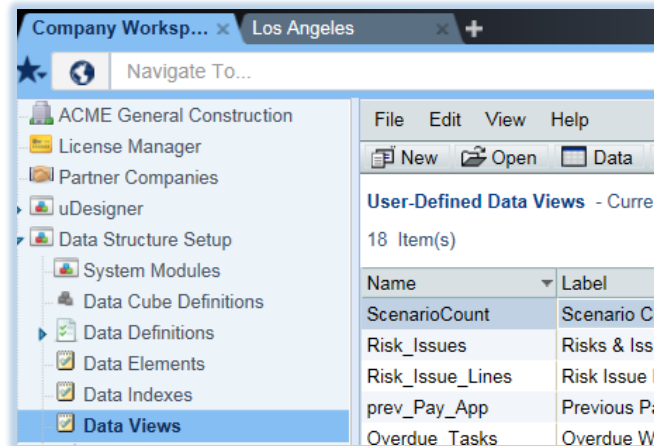
Name	Label	Description	Pub
ScenarioCount	Scenario Count		
Risk_Issues	Risks & Issues		
Risk_Issue_Lines	Risk Issue Lines		
prev_Pay_App	Previous Pay App	This view is to retrieve the pr	
Overdue_Tasks	Overdue Workflow Tas		

Draft

**Published**

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

If Publication is successful, the data can be checked by clicking 'Data' after selecting the Data View.



The data returned from the SQL can be seen from the Data window. In this example four projects are included in Scenario 1 for the portfolio LA Capital Planning.

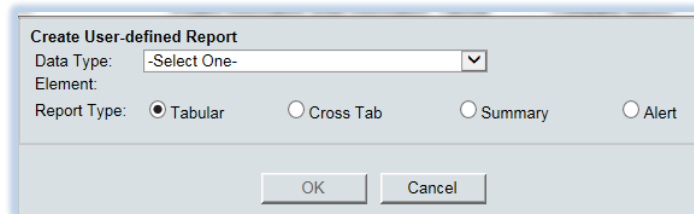
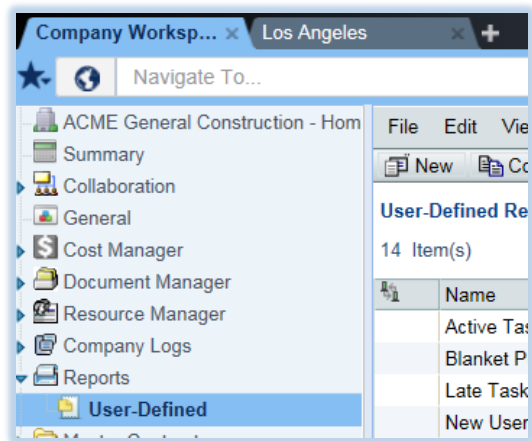
The screenshot shows a data window titled 'unifier\_\_ScenarioCount log - Current View: All'. It displays '4 Item(s)' and 'Page 1 of 1'. The 'Display' dropdown is set to '100' and 'Items Per Page' is also '100'. The table has four columns: 'portfolio\_name', 'scenario\_name', 'periodyear', and 'project'. The data is as follows:

portfolio_name	scenario_name	periodyear	project
LA Capital Planning	Scenario 1	2015	Fuel System Expansion
LA Capital Planning	Scenario 1	2015	Runway 9R Reconstruction
LA Capital Planning	Scenario 1	2015	Additional Terminal
LA Capital Planning	Scenario 1	2015	Terminal Expansion

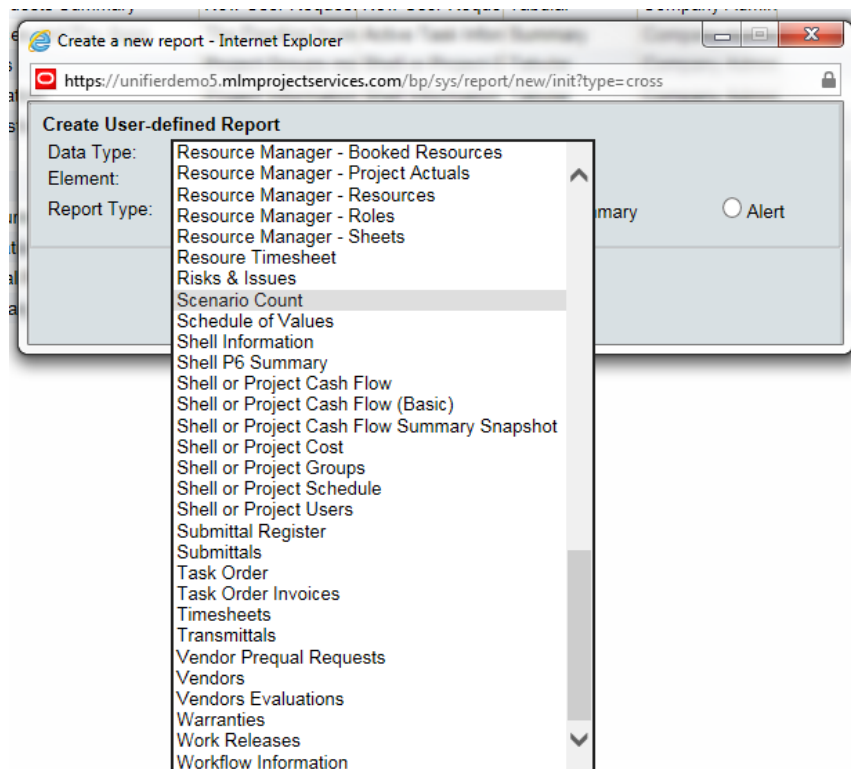
The published Data View is now be available for use in UDRs. Since this example is using the Portfolio Manager the Data View will be available for company-level UDRs.

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

The next step is creating the UDR. In Company Workspace > Reports > User Defined, click 'New'.

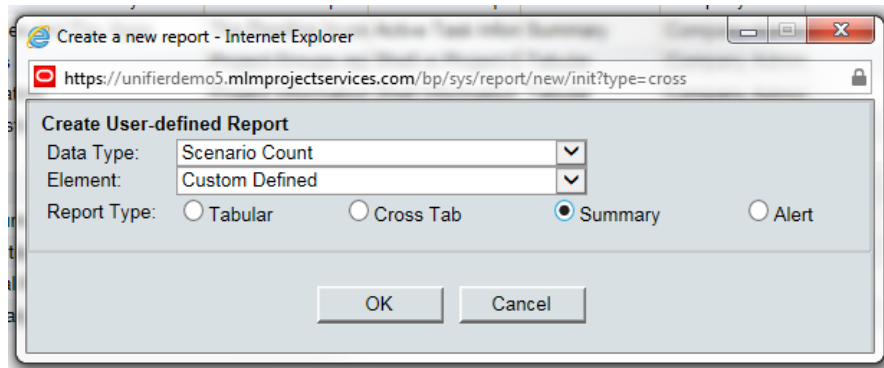


The Data View can now be found within the list of Data Types.

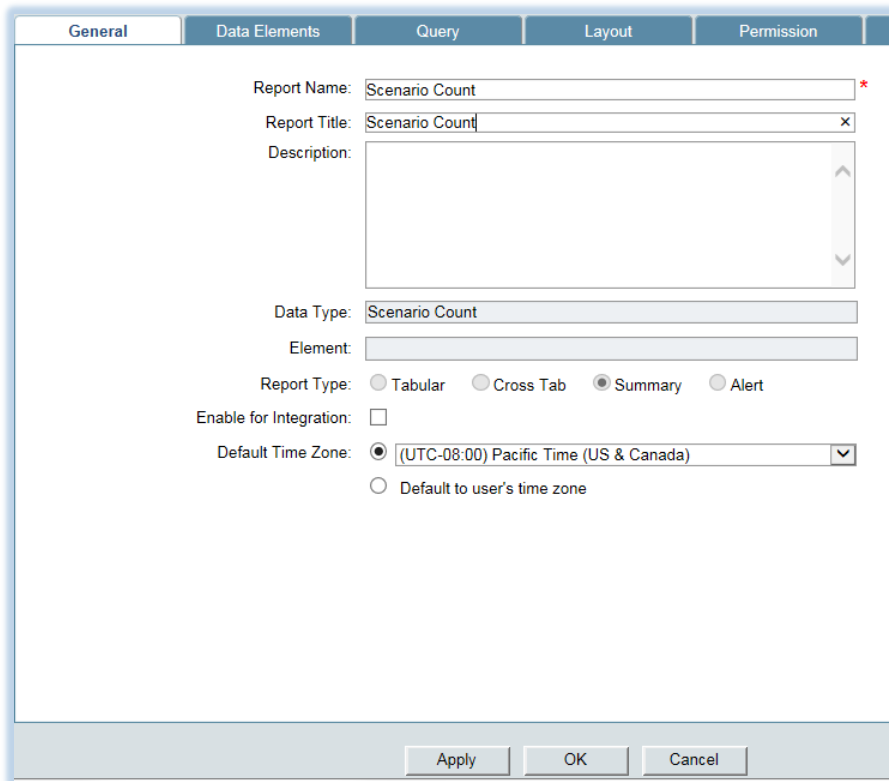


# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

Select the Report Type to Summary and click 'OK'.



In the General tab enter the Report Name (Report Title will default to Report Name as well).



# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

In the Data Elements tab click 'Select' for the Data Element in the 1<sup>st</sup> column section.

The screenshot shows the 'Data Elements' tab of a User Defined Report (UDR) configuration window. The window has a tabbed interface with 'General', 'Data Elements', 'Query', 'Layout', 'Permission', and 'Schedule' tabs. The 'Data Elements' tab is active, showing two columns for configuration.

**1st Column:**

- Data Element:** A text input field followed by a 'Select...' button with a red asterisk.
- Heading:** A text input field with a red asterisk.
- Width:** A text input field.
- By:** A dropdown menu set to 'Year'.
- Format:** A dropdown menu.
- From:** A series of dropdown menus for year (2015), quarter (Q1), month (Jan), and day (01).
- To:** A series of dropdown menus for year (2015), quarter (Q1), month (Jan), and day (01).

**2nd Column:**

- Record Count:** Radio buttons for 'Record Count' and 'Summary Value', with a 'Formula' button.
- Summary Type:** A dropdown menu set to 'Summary'.
- Heading:** A text input field set to 'Value' with a red asterisk.
- Width:** A text input field.
- Decimal Places:** A dropdown menu set to '2'.
- Currency Format:** A dropdown menu set to 'None'.

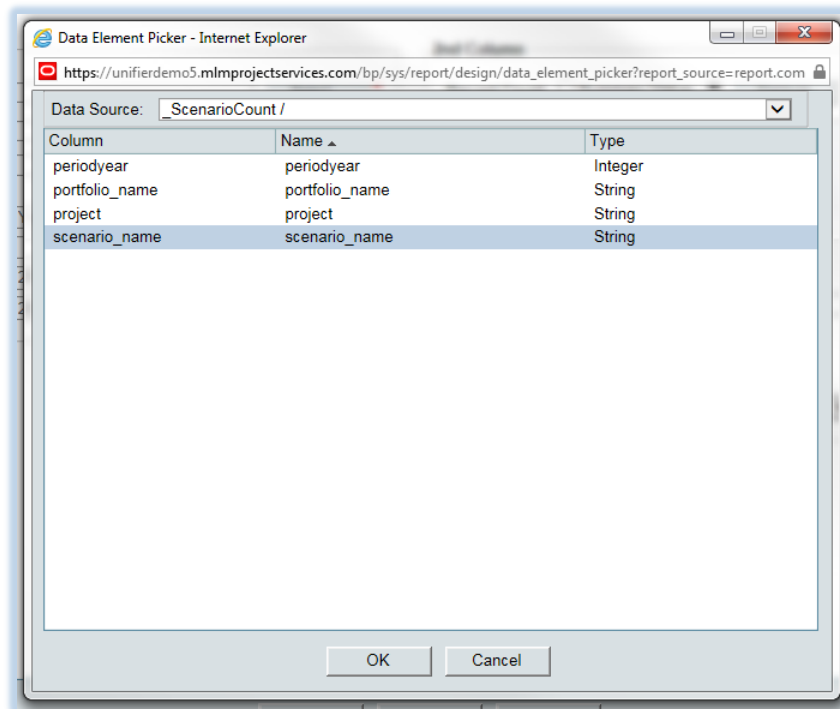
At the bottom of the window are three buttons: 'Apply', 'OK', and 'Cancel'.

Since this example will count the number of projects for the scenario sheet, select 'scenario\_name' and click 'OK'.

Note – these are the fields that were available from the Data View.



## USING A DATA VIEW IN A USER DEFINED REPORT (UDR)



In the 2<sup>nd</sup> Column section select 'Summary Value' and click 'OK'

The screenshot shows the "Data Elements" tab of a User Defined Report configuration window. The window has tabs for "General", "Data Elements", "Query", "Layout", "Permission", and "Schedule".

**1st Column:**

- Data Element: "\_ScenarioCount / scenario\_name" (with a "Select..." button and a red asterisk)
- Heading: "scenario\_name" (with a red asterisk)
- Width: (empty text box)
- By: "Year" (dropdown)
- Format: (empty dropdown)
- From: "2015" (year), "Q1" (quarter), "Jan" (month), "01" (day) (all dropdowns)
- To: "2015" (year), "Q1" (quarter), "Jan" (month), "01" (day) (all dropdowns)

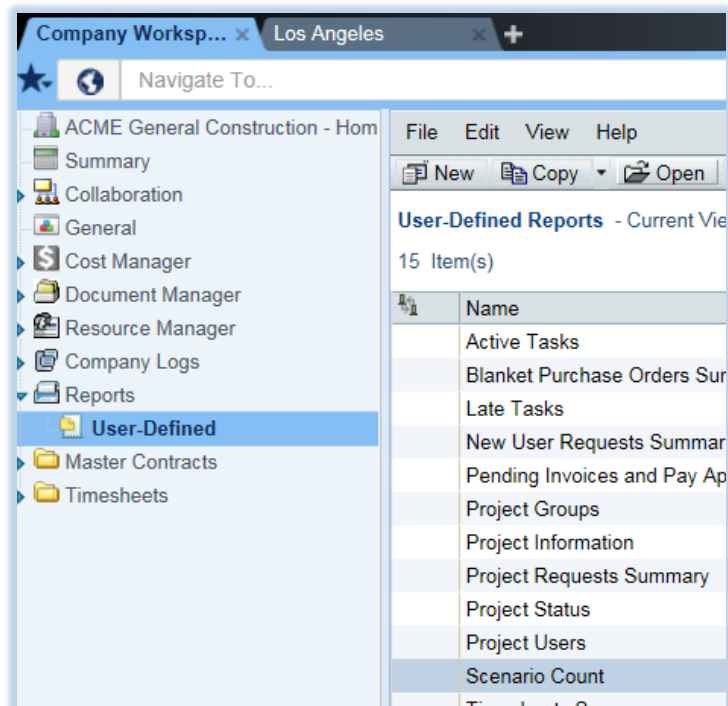
**2nd Column:**

- Record Count: ☒ Summary Value, ☐ Formula
- Summary Type: "Summary" (dropdown)
- Heading: "Value" (with a red asterisk)
- Width: (empty text box)
- Decimal Places: "2" (dropdown)
- Currency Format: "None" (dropdown)

At the bottom are "Apply", "OK", and "Cancel" buttons.

Back in the UDR log, click 'Open'.

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

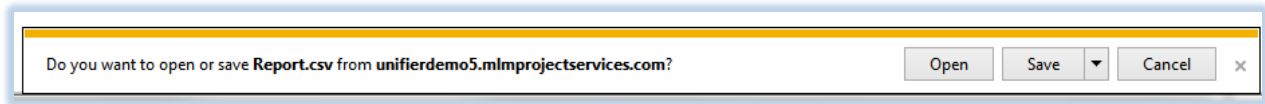


As an alternative to HTML or PDF format, select Report Format CSV and click 'Run'.

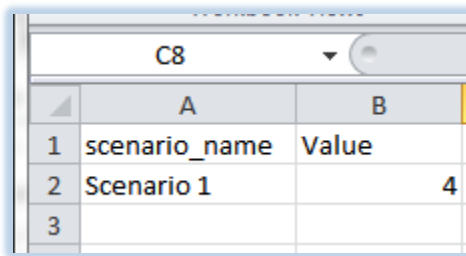
The screenshot shows the 'Query' tab of the application. The 'Time Zone' is set to '(UTC-08:00) Pacific Time (US & Canada)'. The 'Report Query Parameters' section indicates 'All records will be returned.' The 'Report Format' is set to 'CSV' (selected). The 'Save Report Location' section includes checkboxes for 'Save results in Unifier' and 'Document Manager'. The 'Save As' field is empty, and the 'Location' field is empty with a 'Select...' button next to it. The 'Run' and 'Cancel' buttons are at the bottom.

# USING A DATA VIEW IN A USER DEFINED REPORT (UDR)

Click 'Open' when prompted.



Excel will open and display the correct count for the scenario sheet.

A screenshot of an Excel spreadsheet. The active cell is C8. The table has two columns, A and B, and three rows of data. Row 1 contains the headers "scenario\_name" and "Value". Row 2 contains "Scenario 1" and "4". Row 3 is empty.

	A	B
1	scenario_name	Value
2	Scenario 1	4
3		