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PRIMAVERA

Primavera Portfolio Management 8.0
Reporting Views for SQL Server databases

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How to easily create Database Views – SQL Server

Database Views

What?	**In Primavera® Portfolio Management 8.0 you can**: 1. Create DB views from scorecards, maps, forms and Tabs. 2. Create DB views from ALL scorecards, maps, forms or Tabs in a single command. 3. Create DB views from any categories. 4. Delete all DB views in a single command.
Why?	Provide access to Primavera® Portfolio Management data using standard database tools.
Where?	Create and access on the server
Who?	Someone with access rights to the Primavera® Portfolio Management database on the Database Server
How?	Keep on reading…

Part 1: Creating Database Views in SQL Server

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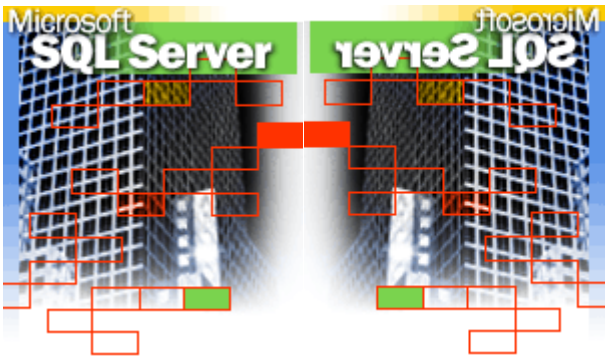


Open the Database

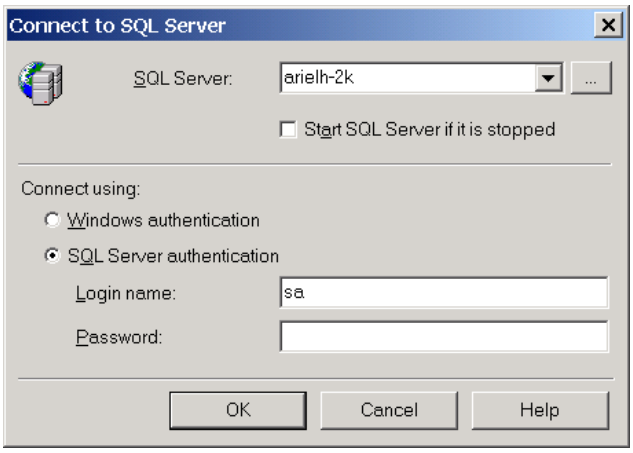
1

Connect to the SQL Server:

Open the Query analyzer from **Start / Programs / Microsoft SQL Server / Query analyzer**

Fill in/ select:

- SQL Server name
- Login name and Password



Select Database:

In the Query Analyzer, select the Primavera® Portfolio Management database

2 Create a DB View from a single Scorecard, Map, Form or Tab (NAME)

In a single step, you can create a DB View that contains all the categories of a scorecard, a map, a form or a Tab.

Create a View from a scorecard

Type the text to the right. Black text is the procedure name – type it as is.

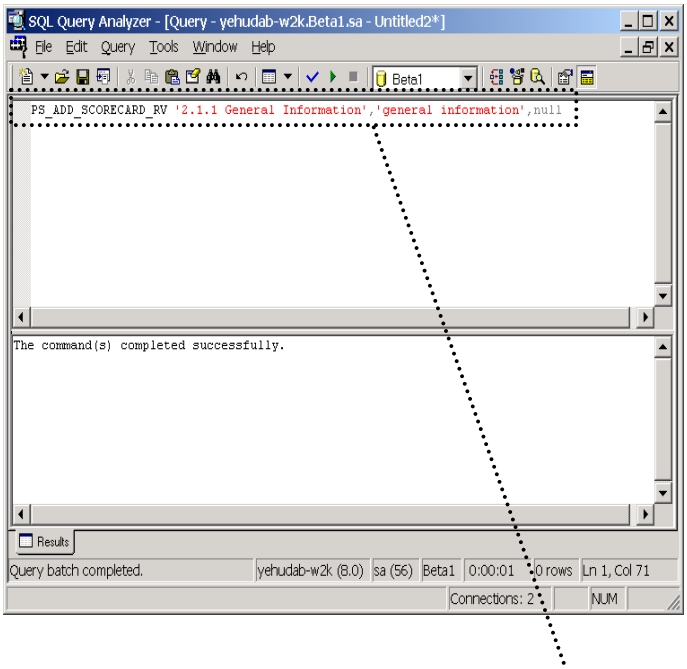
The first parameter is the scorecard name as it appears in Primavera® Portfolio Management

The second parameter is the view name

Type **null** for the view description

RUN (▶)

You have now created a view with the name you entered (general_information in this example)



Names should contain: letters, numbers, '_', '@' or '#'

PS_ADD_SCORECARD_RV '2.1.1 General Information' , 'general_information' , null

Procedure for scorecard | Scorecard name | DBView name | Description

Create Views from any object

Same as for scorecards, just replace the procedure name according the list to the right.

By Name

PS_ADD_SCORECARD_RV	Scorecard
PS_ADD_MAP_RV	Map
PS_ADD_FORM_TAB_RV	Tab
PS_ADD_FORM_RV	Form

PS_ADD_**OBJECT**_RV 'object name' , 'dbview_name' , null

Procedure for **OBJECT** | Object name | DBView name | Description

3 Create a DB View from a single Scorecard, Map, Form or Tab (ID)

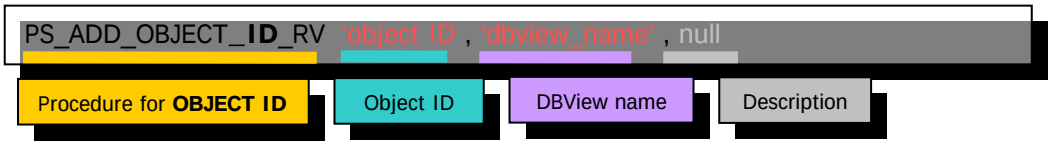
In a similar single step, you can create a DB View that contains all the categories of a scorecard, a map, a form or a Tab using the object's ID.

Create Views using IDs

Replace the procedure name with a relevant string according the list to the right. Use the ID instead of the name.

By ID

PS_ADD_SCORECARD_ID_RV	Scorecard
PS_ADD_MAP_ID_RV	Map
PS_ADD_FORM_TAB_ID_RV	Tab
PS_ADD_FORM_ID_RV	Form

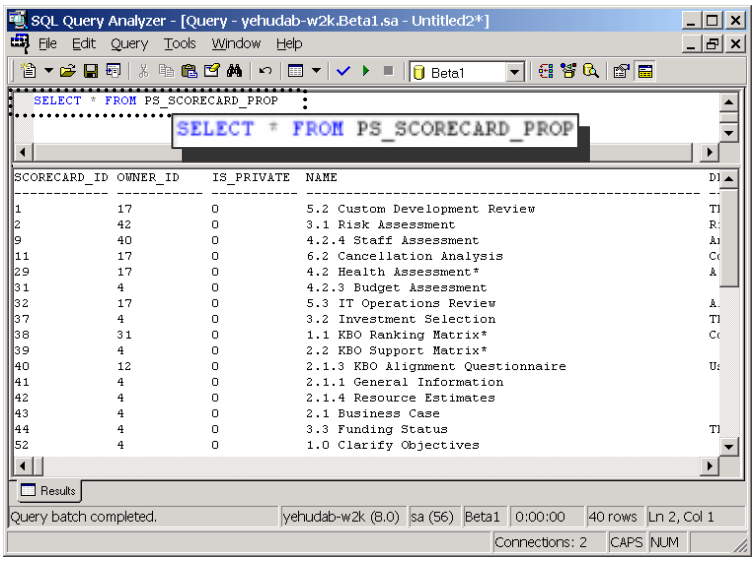


How do you find objects' IDs?

Type the text to the right. (see table below for each object's procedure name)

RUN (►)

Find the ID in the list that appears in the lower part of the screen



Replace the procedure name described in the tip above with a relevant string according the list to the right.

Find object names or IDs

PS_SCORECARD_PROP	Scorecard
PS_ALIGNMENT_PROP	Map
PS_FORM_PROP	Tab
PS_FORMSET_PROP	Form

4 Create DB Views from ALL Scorecards, Maps, Forms or Tabs

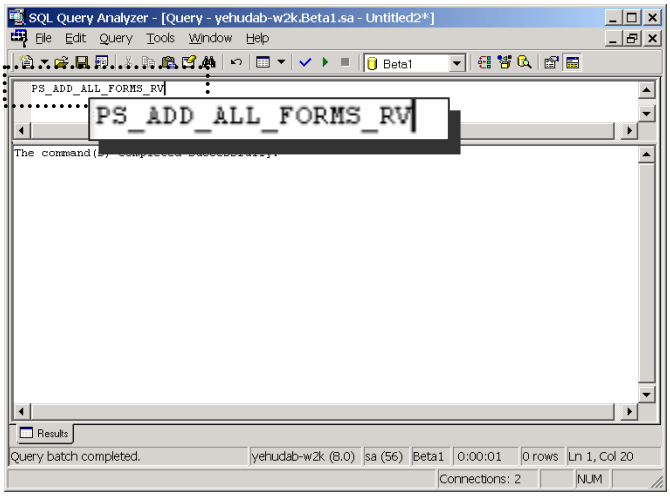
In a single step, you can create DB Views from ALL scorecards, maps, forms or Tabs in the system. In this process you don't give names to the views, instead Primavera® Portfolio Management gives a default name that matches the objects' names in Primavera® Portfolio Management.

Create a View from all Forms

Type the text to the right.

RUN (►)

You now created views from all forms in the system



Maximum number of categories in a single view = 40. Some views, especially form generated views, may be truncated.

Replace the procedure name described above with a relevant string according the list to the right.

Create from ALL

PS_ADD_ALL_SCORECARDS_RV	ALL scorecards
PS_ADD_ALL_MAPS_RV	ALL maps
PS_ADD_ALL_FORM_TABS_RV	ALL Tabs
PS_ADD_ALL_FORMS_RV	ALL forms

5 Create DB Views from Categories

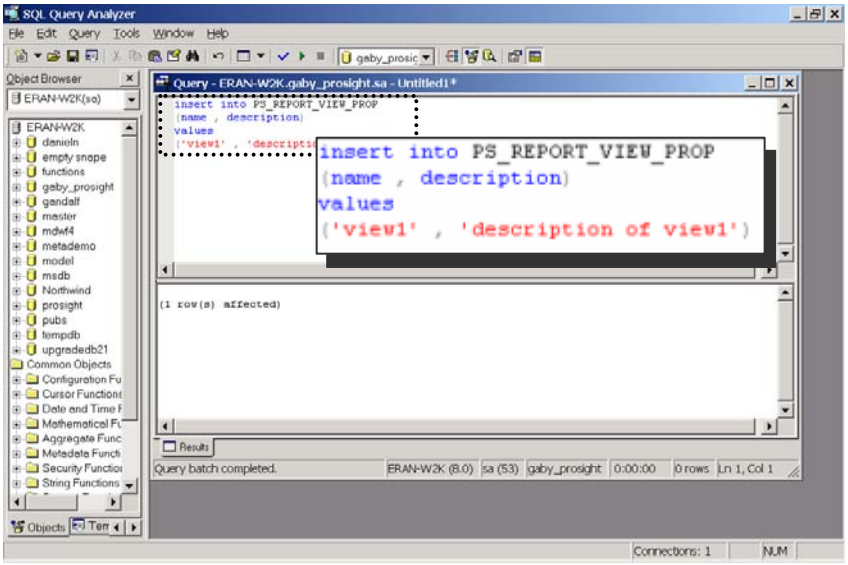
This section describes how to create DB Views and assign categories to them. In this way you can create views that do not resemble any defined Primavera® Portfolio Management map, scorecard or form.

1. Define a New View:

Type the text to the right. The pink text is where you write the **name** of the view and its **description**.

RUN (►)

You now have a view with the name you defined (view1 in our example)



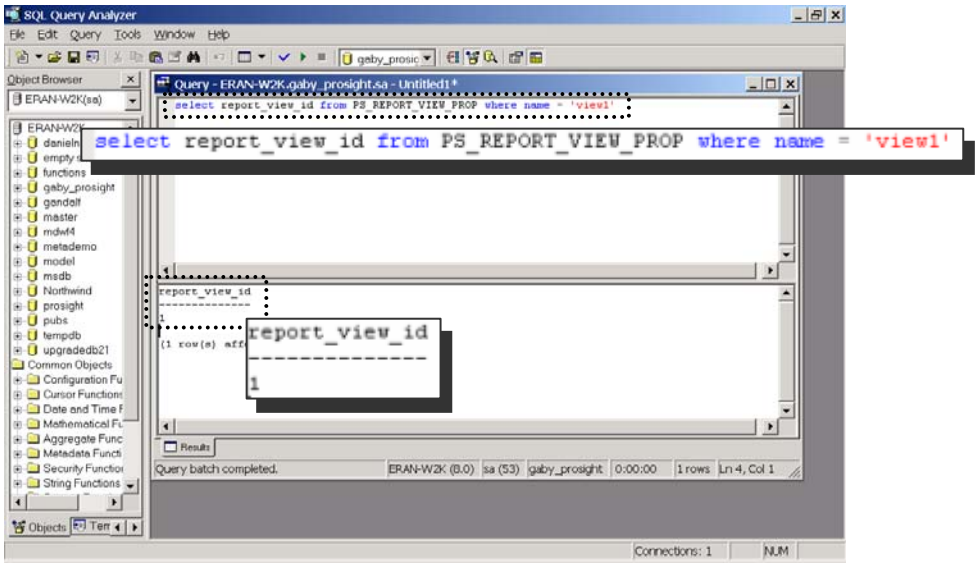
Names should contain: letters, numbers, '_', '@' or '#'

2. Find the Identity Number of your view:

Type the text to the right. The pink text is where you write the **name** of your view.

RUN (►)

In the lower part of the window you will get the number of the requested view (view1 in our example has the Identity Number = **1**)



3. Find out the Category ID:

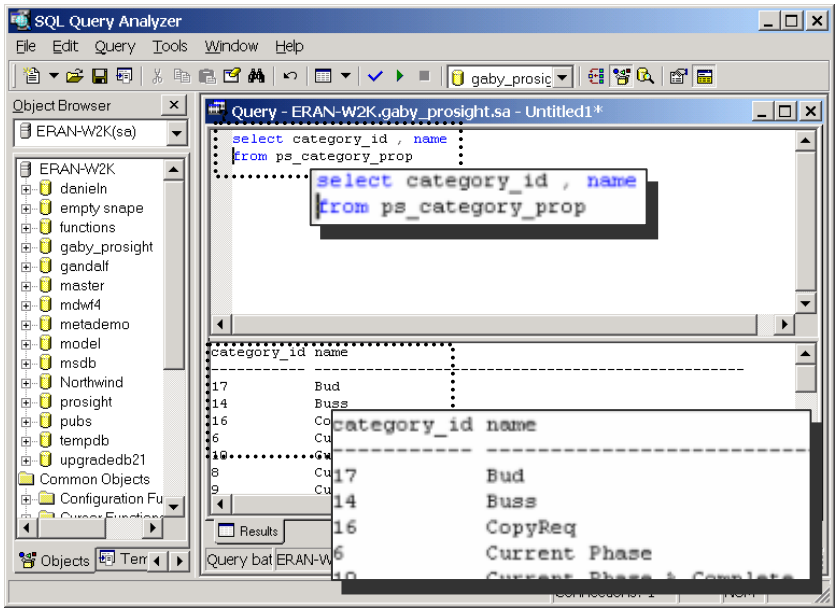
First step is to search the ID of the category by running a query finding all the categories in the system

Type the text to the right

RUN (►)

Find the category ID in the list at the lower part of the window.

In the example we used the first category: Bud which ID = 17



4. Insert the Category to the View:

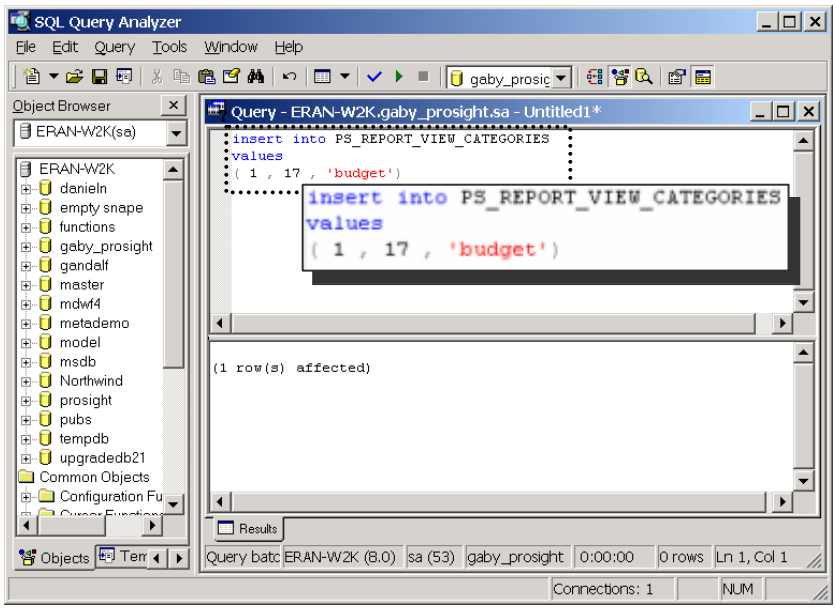
Type the text to the right where:

1st # = View ID (1)

2nd # = Category ID (17)

3rd = name of the category as it will appear in the view. (budget)

If you wish to keep the name of the category as it appears in Primavera® Portfolio Management – type 'null'



5. insert more categories

- Repeat steps 1-4 to insert more categories to your view.
- Repeat step 6 to create more views and insert categories to them

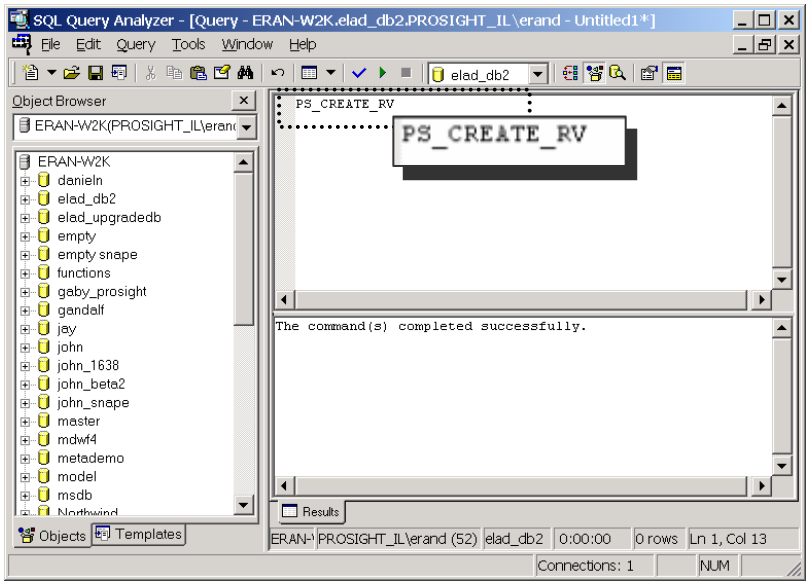
You can add up to **40 categories** to a single view

6. Create Views

At the end of the process you must run the following command to really create the views. You can run all the views in a single command, or run it one by one.

Type the text to the right

RUN (►)



6 Delete ALL DB Views from the server

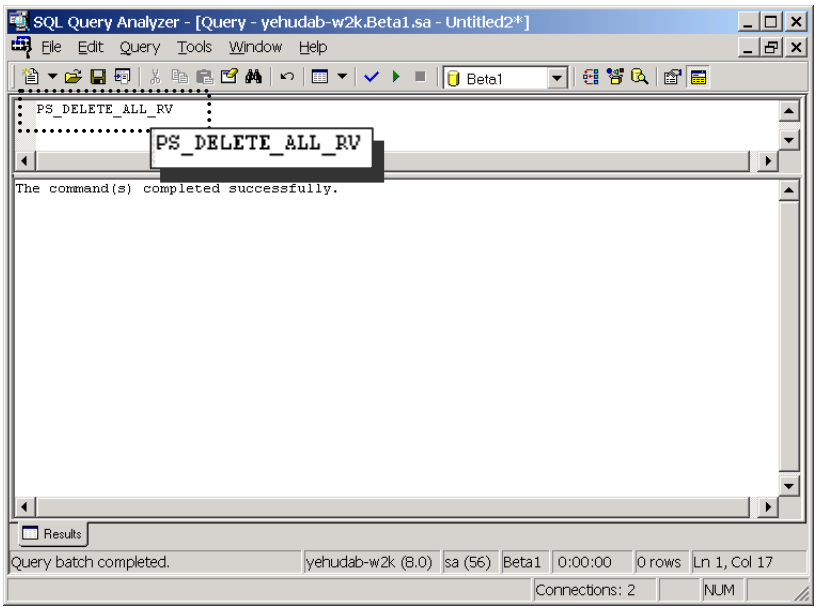
Delete ALL DB Views

Type the text to the right.

RUN (►)

You have now deleted all reporting views from ProSight

Note: There is NO warning. Views are deleted immediately.



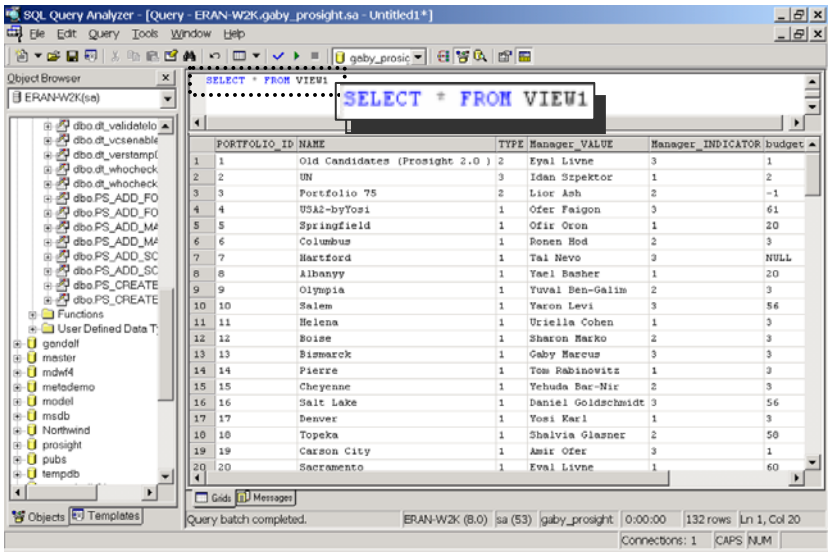
7 Displaying Database View content

Display view content:

Run the command to the right where VIEW1 is the view name

To run the command for views that have spaces in their name, use square parentheses before and after name:

SELECT * FROM [NAME WITH SPACES]



To run the command for views that have [square parentheses] in their name, use additional square parentheses after the name:

For name = 'budget [actual]'

Write: SELECT * FROM [BUDGET [ACTUAL]]]