

ORACLE®

PRIMAVERA

**Portfolio Management
Reporting Views for Oracle Databases
19**

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Introduction

Reporting Views for Oracle Databases enables you to do the following:

- Create Database views from scorecards, maps, forms and Tabs.
- Create Database views from ALL scorecards, maps, forms or Tabs in a single command.
- Create Database views from any categories.
- Delete all DB views in a single command.
- Provide access to Primavera® Portfolio Management data using standard database tools.

These actions can be performed by someone with access rights to the Primavera® Portfolio Management database on the Database Server.

Oracle Tips

1. View names can consist only of **30** characters. Note! Oracle allows writing a 50 character name, but only 30 are recorded.
2. Category names can consist only of **20** characters. Note! Oracle allows writing a 50 character name, but only 20 are recorded.
3. When searching for names always write them in capital letters, especially if they contain spaces.
4. Maximum categories in a single view = 20

Open the Database

Connect to Oracle:

Open SQL Plus from **Start / Oracle - OraHome / Application Development / SQLPlus Worksheet**.

In the Login screen, enter the Server username, password, and service name.

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.

For example enter the following command in the SQL Plus Worksheet screen to create a view from a scorecard:

```
EXEC PS_ADD_SCORECARD_RV ('General Information', 'general_information', null)
```

PS_ADD_SCORECARD_RV is the procedure name for the object; in this case, the procedure name for the scorecard.

The first parameter is the scorecard name as it appears in Primavera Portfolio Management. In this example, it is 'General Information.'

The second parameter is where you define the view name. In this example, it is 'general information.'

The third parameter is for a description. You should specify "null" for the description.

Tip: Names should contain letters, numbers, underscore characters (_), at signs (@), or hash characters (#).

When you finish entering the command, press Execute (F5). This creates a view with the name you defined ('general information' in this example).

Create Views from any object

You can create a view from any object the same as for scorecards, except you would replace the procedure name according to the list below:

Procedure Name for By Name

PS_ADD_SCORECARD_RV	Scorecard
PS_ADD_MAP_RV	Map
PS_ADD_FORM_TAB_RV	Tab
PS_ADD_FORM_RV	Form

```
EXEC PS_ADD_OBJECT_ID_RV ('object ID', 'dbview name', null)
```

Where PS_ADD_OBJECT_ is the procedure, 'object name' is the Object Name, 'dbview name' is the DBView Name, and null is the description.

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 below. Use the ID instead of the name.

Procedure Name for 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

```
EXEC PS_ADD_OBJECT_ID_RV ('object ID , 'dbview name' , null)
```

Where `PS_ADD_OBJECT_` is the procedure, 'object name' is the Object Name, 'dbview name' is the DBView Name, and `null` is the description.

How do you find object's IDs?

You can find the ID of an object by typing `SELECT * FROM` followed by one of the following procedure names, depending on the applicable type of object:

Procedure Name to Find object names or IDs

PS_SCORECARD_PROP	Scorecard
PS_ALIGNMENT_PROP	Map
PS_FORM_PROP	Tab
PS_FORMSET_PROP	Form

1. For example, to find the object ID for scorecard, type the following in the SQL Plus Worksheet screen:

```
SELECT * FROM PS_SCORECARD_PROP
```

2. When you finish entering the command, press Execute (F5).
3. Locate the ID in the list that appears in the lower part of the screen.

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.

For example enter the following command in the SQL Plus Worksheet screen to create a view from all Forms:

```
exec ps_add_all_forms_rv
```

When you finish entering the command, press Execute (F5). This creates views from all Forms in the system.

Note: The maximum number of categories in a single view = **20**. Some views, especially Form generated views, may be truncated.

Create Views from ALL

You can create views from all of any object the same as for forms, except you would replace the procedure name according to the list below:

Procedure Name to 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

Create DB Views from Categories

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

1. Define a New View:

1. In the SQL Plus Worksheet screen, type the text shown below. However, replace `view1` with your name of the view, and replace `description of view1` with your description.

```
insert into ps_report_view_prop
(report_view_id , name , description)
values
(P_S_REPORT_VIEW_PROP_S.NEXTVAL , 'view1' , 'description of
view1');
```

2. When you finish entering the applicable text, press Execute (F5).
3. This creates a view with the name you defined (view1 in this example).

2. Find the Identity Number of your view:

1. In the SQL Plus Worksheet screen, type the text shown below. However, replace `view1` with your name of your view.

```
select * from ps_report_view_prop where name = 'view1'
```

2. When you finish entering the applicable text, press Execute (F5).
3. In the lower part of the window you will get the number of the requested view.

4. Find out the Category ID:

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

1. In the SQL Plus Worksheet screen, type the text shown below:

```
select category_id,name from ps_category_prop
```

2. When you finish entering the applicable text, press Execute (F5).
3. Find the category ID in the list at the lower part of the window. In the example we used the first category: Manager which ID = 1, shown in the lower part of the window:

```
Category_ID NAME
          1 Manager
          2 Start Date
          End Date
          Description
          Status
          Life Cycle
          Domain
          func1
          func2
```

4. Insert the Category to the View:

In the SQL Plus Worksheet screen, type the text shown below, where the first number is View ID (1), the second number is Category ID (17), and the third item is the name of the category as it will appear in the view.

Note: If you want to keep the name of the category as it appears in Primavera Portfolio Management, type null for the third item, as shown below.

```
insert into ps_report_view_categories
values
(6 , 2 , null);
```

5. Insert more categories

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

Note: You can add up to 20 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.

1. In the SQL Plus Worksheet screen, type the text shown below:

```
exec ps_create_rv
```
2. When you finish entering the applicable text, press Execute (F5).

Delete All DB Views from the server

To delete all DB Views:

1. In the SQL Plus Worksheet screen, type the text shown below:

```
exec ps_delete_all_rv
```
2. When you finish entering the applicable text, press Execute (F5).

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

Displaying Database View content

To display view content:

1. In the SQL Plus Worksheet screen, type the text shown below, where VIEW1 is the view name.

```
select from "GENERAL INFORMATION"
```

Note: To run the command for views that have spaces in their name, use quotes before and after name: `SELECT * FROM "NAME WITH SPACES"`

2. When you finish entering the applicable text, press Execute (F5).