PRIMAVERA

Portfolio Management
Reporting Views for SQL Server Databases
19

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Introduction

Reporting Views for SQL Server 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.

Open the Database

Connect to the SQL Server:

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

Enter the following:

- SQL Server name
- Login name and Password

Select Database:

In the Query Analyzer, select the Primavera® Portfolio Management database from the dropdown.

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 following command text.

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

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.

Click RUN.

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

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

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
```

Where `PS_ADD_OBJECT_RV` 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 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

```
PS_ADD_OBJECT_ID_RV  'object ID , 'dbview_name' , null
```

Where `PS_ADD_OBJECT_ID_RV` is the procedure, `'object ID'` is the Object ID, `'dbview_name'` is the DBView Name, and `null` is the description.

How do you find objects' IDs?

1. Type the following text

   ```
   SELECT * FROM PS_SCORECARD_PROP
   ```

   Note: See table below for each object's procedure name.

2. Click **RUN**.
3. 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

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

1. Type the following text:

   `PS_ADD_ALL_FORMS_RV`

2. Click Run.
3. 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

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:

1. Type the text to the right.

```
insert into PS_REPORT_VIEW_PROP
(name , description)
values
('view1' , 'description of view1')
```

   Where `'view1'` is the name of the view and `'description of view1'` is the description.

2. Click **RUN**.

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

2. Find the Identity Number of your view:

1. Type the following text:

```
select report_view_id_from PS_REPORT_VIEW_PROP where name
= 'view1'
```

Note: 'view1' can be replaced with the name of your view.

2. Click **RUN**.
3. In the lower part of the window you will get the number of the requested view.

3. Find out the Category ID:

1. Search the ID of the category by running a query finding all the categories in the system.
2. Type the following text:

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

3. Click **RUN**.
4. Find the category ID in the list at the lower part of the window.

4. Insert the Category to the View:

Type following text:

```
insert into PS_REPORT_VIEW_CATEGORIES
values
( 1 , 17 , 'budget')
```

where the first number is the View ID, the second number is the Category ID, and the text ('budget') is the name of the category as it will appear in the view.

Note: 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.

1. Type the following text:

   `PS_CREATE_RV`

2. Click **RUN**.

Delete ALL DB Views from the server

Delete ALL DB Views

1. Type the following text:

   `PS_DELETE_ALL_RV`

2. Click **RUN**.

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

Displaying Database View content

Display view content:

Run the following command to the right where `VIEW1` is the view name:

```
SELECT * FROM VIEW1
```

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]]`