

Oracle® Primavera Portfolio Management

Reporting Views for Microsoft SQL Server Databases Guide



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Introduction

Reporting views for SQL Server databases let authorized users generate or delete database views from Oracle Primavera Portfolio Management scorecards, maps, forms, tabs, and categories for standard reporting access.

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 database views in a single command.
- Provide access to Primavera Portfolio Management data using standard database tools. These actions must be performed by a user with access rights to the database on the database server.

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Opening the Database

Connect to SQL Server using Query Analyzer, then select the Primavera Portfolio Management database to run queries.

Before you can create, delete, or display database views, you must log into the database as a user with the appropriate rights.

1. Open Query Analyzer from Start / Programs / Microsoft SQL Server / Query analyzer. When prompted, enter the SQL server name, login name, and password
2. In Query Analyzer, select the Primavera Portfolio Management database from the list.

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Creating Database Views

This chapter provides step-by-step instructions and naming rules for creating and managing database views.

You can create database views in Primavera Portfolio Management from scorecards, maps, forms, or tabs using either names or IDs. You can also generate views for all objects at once or manually build custom views by defining them, retrieving IDs, and assigning categories.

Creating Database Views from a Single Form, Map, Scorecard, or Tab

You can create a database view based on an existing form, map, scorecard, or tab in Primavera Portfolio Management.

With a single database command, you can create a database view based on an existing form, map, scorecard, or tab in Primavera Portfolio Management. The database view you create will contain all the categories from the original form, map, scorecard, or tab.

To create database views, you must be logged into the Primavera Portfolio Management database as a user with the appropriate rights. See: [Opening the Database](#).

Related Topics

- [Opening the Database](#)
Connect to SQL Server using Query Analyzer, then select the Primavera Portfolio Management database to run queries.

Creating a View from a Scorecard

Using a single query, you can create a database view that contains all the categories of a scorecard.

1. In Query Analyzer, type the following command:

```
PS_ADD_SCORECARD_RV '<ScorecardName>', '<ViewName>', '<ViewDescription>'
```

Where:

- '<ScorecardName>' is the name of the scorecard as it appears in OPPM.
- '<ViewName>' is the name of the view. The view name should contain letters, numbers, or the following special characters: _, @, or #.
- '<ViewDescription>' is the description.

For example,

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

2. Click **Run**.

Creating a View from Any Object

Using a single query, you can create a database view from any object.

In a similar way to creating a view from a scorecard, you can create a database view from any object. Depending on the object type, you will use a different procedure name.

- To create a view from a form, use PS_ADD_FORM_RV.
- To create a view from a map, use PS_ADD_MAP_RV.
- To create a view from a scorecard, use PS_ADD_SCORECARD_RV.
- To create a view from a tab, use PS_ADD_FORM_TAB_RV.

1. In Query Analyzer, type the following command:

```
PS_ADD_<ObjectType>_RV '<ObjectName>', '<ViewName>', '<ViewDescription>'
```

Where:

- '<ObjectName>' is the Object Name.
- '<ViewName>' is the database view name.
- '<ViewDescription>' is the description. You can use null if you do not want to provide a description for the view.

2. Click **Run**.

Creating a View Using an ID

Using a single query, you can create a database view using the ID of an object

You can create a database view from any object if you know its ID. Depending on the object type, you will use a different procedure name.

- To create a view from a form using its ID, use PS_ADD_FORM_ID_RV.
- To create a view from a map using its ID, use PS_ADD_MAP_ID_RV.
- To create a view from a scorecard using its ID, use PS_ADD_SCORECARD_ID_RV.
- To create a view from a tab using its ID, use PS_ADD_FORM_TAB_ID_RV.

You must know the ID of the object from which you want to create the database view. To find the object ID, type `SELECT * FROM PS_SCORECARD_PROP`, then find the ID for the object in the resulting list.

1. In Query Analyzer, type the following command:

```
PS_ADD_<ObjectType_ID>_RV '<ObjectID>', '<ViewName>', '<ViewDescription>'
```

Where:

- '<ObjectID>' is the ID of the form, map, scorecard, or tab.
- '<ViewName>' is the database view name.

- '<ViewDescription>' is the description. You can use null if you do not want to provide a description for the view.
2. Click **Run**.

Create Database Views From All Forms, Maps, Scorecards, or Tabs

Using a single query, you can create a database view from all forms, maps, scorecards, or tabs.

To create a view from all forms, maps, scorecards, or tabs, you do not specify a name for the view. Instead, Primavera Portfolio Management gives a default name that matches the objects' names in Primavera Portfolio Management. Depending on the object type, you will use a different procedure name.

- To create a view from all forms, use PS_ADD_ALL_FORMS_RV.
- To create a view from all maps, use PS_ADD_ALL_MAPS_RV.
- To create a view from all scorecards, use PS_ADD_ALL_SCORECARDS_RV.
- To create a view from all tabs, use PS_ADD_ALL_FORM_TABS_RV.

Note

The maximum number of categories that can be included in a single view is 40. Some views, especially those generated from forms, may be truncated.

1. In Query Analyzer, type the appropriate command according to the list above.
For example, PS_ADD_ALL_FORMS_RV.
2. Click **Run**.

Create Custom Database Views

You can create database views without basing your new view on an existing object.

You can create a database view and specify the categories to assign to the view. You can assign up to 40 categories to a view.

1. Define a new view.
Use the INSERT INTO statement. You must provide a view name and description.
For example,

```
insert into PS_REPORT_VIEW_PROP
(name , description)
values
('AssetReport', 'List of all assets including their ID, location, and
owner')
```


Note

The view name may contain only letters, numbers, and the following special characters: `_`, `@`, or `#`.

Then click **Run**.

2. Find the ID number of your view.

Type `select report_view_id from PS_REPORT_VIEW_PROP where name = '<ViewName>'`

For example, `select report_view_id from PS_REPORT_VIEW_PROP where name = 'AssetReport'`

Then click **Run**.

Make a note of the ID number returned by this query.

3. Find the IDs of the categories you want to include in the view.

Type `select category_id, name from ps_category_prop.`

Then click **Run**.

Make a note of the IDs of the categories you want to include in the view from the information returned by this query.

4. Insert the categories into the view.

Type `insert into PS_REPORT_VIEW_CATEGORIES values (<ViewID>, <CategoryID>, <ColumnName>)`

Where

- `<ViewID>` is the ID returned in step 2.
- `<CategoryID>` is the ID of a category returned in step 3.
- `<ColumnName>` is the name you want to give to the column in the database view.

Note

If you want to keep the name of the category as it appears in Primavera Portfolio Management, instead of `<ColumnName>`, use `null`.

For example, `insert into PS_REPORT_VIEW_CATEGORIES values ( 1 , 17 , 'AssetID')`

Then click **Run**.

Repeat this step for each of the categories you want to assign to the view.

5. Create the view.

Once the view is fully defined, you must create the view.

Type `PS_CREATE_RV.`

Then click **Run**.

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Displaying Database View Content

Once a view has been created, you can display the content of the view.

1. Type `SELECT * FROM <ViewName>`.

For example, `SELECT * FROM AssetReport`.

Note

To specify the name of a view that has spaces in its name, surround the view name with square parentheses, for example `SELECT * FROM [Asset Report]`. To specify the name of a view that has square parentheses in its name, surround the entire view name in square parentheses. For example, if the view is called 'Asset Report [London]', use `SELECT * FROM [Asset Report [London]]`

2. Click **Run**.

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Delete All Database Views From the Server

You can delete all database views.

There may be times when you need to delete database views, for example if the underlying tables or views have changed since the views were originally created.

Note

There is no warning or confirmation message when you delete database views. All views are deleted from the database when you run the command.

- Type `PS_DELETE_ALL_RV`, then click **Run**.

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