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CA PPM 14.2   
CA PPM 14.3  
CA PPM 14.4  
CA PPM 15.1

Hierarchical Views r3.3  
Installation Procedure

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# Installation Instructions

## Pre-reqs

This package assumes:

1. You have XOG installed in the correct version (v14.2, v14.3, v14.4, v15.1)
2. You have a user called “xog” that has a password “gox” with **all access rights** to xog stuff in.

## Package Installation

1. Download the Package ZIP file from the CA Wiki page.
2. Unzip the package file into your c:\temp folder.
3. Open Windows Explorer and Navigate to C:\Temp\hierView\_v3\_3
4. Right-Click the file “hierView\_v3\_3Install.bat” and select “Edit” from the Drop Down Menu
5. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
6. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
7. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
8. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
9. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
10. Locate the line where the JAVA\_HOME variable is set and replace it with the correct JAVA\_HOME path
11. Save this file
12. Run the file by double-clicking it.
13. Navigate to C:\Temp\hierView\_v3\_3\output
14. Check all the output files for errors
15. You shouldn’t see any errors. If you do, try to verify the reason and correct it. It’s ok to run it again after you correct something. If you don’t find the problem, drop me a note and I’ll try to help you out.
16. Security warnings for Pages and Portlets are normal – they will be corrected when the Groups are loaded. Security warnings for Groups are also normal – they will be corrected when Seed Data is loaded.

## Post-Installation Steps

1. Login to CA PPM as Admin
2. Apply HTML Portlets Fix
   1. Navigate to Home, Setup, HTML File List
   2. Click on hierView.html
   3. Click the “Choose file” button
   4. If you are not using SSL, select file C:\Temp\hierView\_v3\_3\hierView.html
   5. If you are using SSL, Go to C:\Temp\hierView\_v3\_3\SSL\hierView.html
   6. Click Save. The file will be uploaded.
   7. Navigate to Administration, Data Administration, Processes
   8. Search for Process named “Hierarchical HTML Portlets Fix”
   9. Validate and Activate the Process
   10. Navigate to Home, Organizer, Processes, Available Processes
   11. Start process “Hierarchical HTML Portlets Fix”
   12. Wait for the process to finish
3. Run PostInstall Batch
   1. Edit file “hierView\_v3\_3Post\_Install.bat” ” with the Text Editor of your choice
   2. Locate the line where the XOG\_HOME variable is set and replace the path to reflect your XOG installation path
   3. Locate the line where the SERVERNAME variable is set and replace the value with your server name or IP address
   4. Locate the line where the PORTNUMBER variable is set and replace it with the appropriate value (normally, it’s 80)
   5. Locate the line where the USERNAME variable is set and replace it with the username you will use (default is the ‘xog’ user)
   6. Locate the line where the PASSWORD variable is set and replace it with the password for that user (default is ‘gox’)
   7. Locate the line where the JAVA\_HOME variable is set and replace it with the correct JAVA\_HOME path
   8. Save this file
   9. Run the file by double-clicking it.
   10. Navigate to C:\Temp\hierView\_v3\_3\output
   11. Check all the output files for errors in the files starting in 210
   12. You shouldn’t see any errors. If you do, try to verify the reason and correct it. It’s ok to run it again after you correct something. If you don’t find the problem, drop me a note and I’ll try to help you out.

# Technical Summary

## Object Description

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Object** | **ID** | **Master – Subobject** | **Description** | **Additional information** |
| Hierarchical Views | hiev\_views | Master Object | This object is used to hold the information necessary to configure a new type of hierarchical view, without the need of customizing the html file containing the javascript code. |  |
| HTML File | hiev\_html\_file | Master Object | This object is used to hold the hierView.html code used to execute Google charts library |  |

## Pages

|  |  |  |  |
| --- | --- | --- | --- |
| **Page** | **ID** | **Custom TABs** | **Description** |
| [Hierarchical](http://claritylatam50/niku/nu#action:npt.getPage&pageId=odf.strat_bsc_perspFrame&id=5009062&obsType=Page&principal_type=SYSTEM&principal_id=0) Views Default Layout | odf.hiev\_viewsFrame | Heat Map Options  Org Chart Options  Word Tree Options  Sankey Diagram Options | These are Properties TABs. |
| PMO-Project Status | dashboardProjectStatusFrame | WBS View  gwbs\_hiev\_wbs | A new TAB For the PMO-Project Status layout containing the new Hierarchical Portlets |
| Project - Jaspersoft Project Storyboard | tso.prJSjStoryboard | Graphical WBS View gwbs\_hiev | A new TAB for the Project - Jaspersoft Project Storyboardlayout containing the Hierarchical Portlets |

## Queries

|  |  |
| --- | --- |
| **Queries** | **Description** |
| Hierarchical Views  hiev\_list\_wsdl | Query used by the hierView.html script to load the Hierarchical View Options. |
| Graphical WBS  gwbs\_hiev | Query associated to the hiev\_gwbs\_hm hierarchical view |
| Graphical WBS Phases  gwbs\_hiev\_phases | Query associated to the hiev\_gwbs\_org hierarchical view |

## Portlets

|  |  |
| --- | --- |
| **Portlets** | **Description** |
| WBS Visualization (Heat Map)  gwbs\_hiev\_hm | HTML Portlet with an implementation of Google Charts “Tree Map” showing the WBS |
| WBS Visualization (Hierarchical)  gwbs\_hiev\_org | HTML Portlet with an implementation of Google Charts “Org Chart” showing the WBS |

## Seed Data

|  |  |
| --- | --- |
| **Hierarchical Views** | **Description** |
| WBS Heat Map  hiev\_gwbs\_hm | This Custom Object Instance holds the specific Tree Map options for the gwbs\_hiev\_hm Portlet |
| WBS Hierarchy  hiev\_gwbs\_org | This Custom Object Instance holds the specific Org Chart options for the gwbs\_hiev\_org Portlet |
| **HTML File** | **Description** |
| hierView.html | This custom object instance will hold the hierView.html file as an attachment |