

# HP Project and Portfolio Management Center

Software Version: 7.5

---

## Creating Portlets and Modules

Document Release Date: June 2008

Software Release Date: June 2008



# Legal Notices

## Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

## Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

## Copyright Notices

© Copyright 1997-2008 Hewlett-Packard Development Company, L.P.

## Trademark Notices

Adobe® is a trademark of Adobe Systems Incorporated.

Intel®, Intel® Itanium®, Intel® Xeon™, and Pentium® are trademarks or registered trademarks of Intel Corporation or its subsidiaries in the United States and other countries.

Java™ is a U.S. trademark of Sun Microsystems, Inc.

Microsoft®, Windows®, and Windows® XP are U.S. registered trademarks of Microsoft Corporation.

Microsoft Vista® is either a registered trademark or trademark of Microsoft Corporation in the United States and/or other countries.

Oracle® is a registered U.S. trademark of Oracle Corporation, Redwood City, California.

UNIX® is a registered trademark of The Open Group.

## Documentation Updates

This manual's title page contains the following identifying information:

- Software version number, which indicates the software version
- Document release date, which changes each time the document is updated
- Software release date, which indicates the release date of this version of the software

To check for recent updates, or to verify that you are using the most recent edition of a document, go to:  
[h20230.www2.hp.com/selfsolve/manuals](http://h20230.www2.hp.com/selfsolve/manuals).

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

## Support

You can visit the HP Software Support Web site at [hp.com/go/hpsoftwaresupport](http://hp.com/go/hpsoftwaresupport).

HP Software Support Online provides an efficient way to access interactive technical support tools. As a valued support customer, you can benefit by using the support site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract.

To find more information about access levels, go to: [h20230.www2.hp.com/new\\_access\\_levels.jsp](http://h20230.www2.hp.com/new_access_levels.jsp).

To register for an HP Passport ID, go to: [h20229.www2.hp.com/passport-registration.html](http://h20229.www2.hp.com/passport-registration.html).

# Contents

1	Getting Acquainted with the Standard Interface	9
	Introduction to the Standard Interface	9
	Overview of Creating Portlets and Modules	11
	Standards-Based Portlet Support	14
	The Configuration Process	15
	Related Information	15
2	Creating and Maintaining Portlet Data Sources	17
	Overview of Portlet Data Sources	17
	Searching For and Viewing Existing Portlet Data Sources	19
	Creating or Modifying Portlet Data Sources	21
	Completing the General Information Section	24
	Completing the Data Source Tab	26
	Completing the Select/From Tab	28
	Completing the Where/Filter Tab	30
	Completing the Group By/Order By Tab	33
	Completing the Filter Fields Tab	35
	Completing the Ownership Tab	37
	Copying Portlet Data Sources	39
	Deleting Portlet Data Sources	40
	Viewing Portlet Definition Usage	42
	Supplemental Details for the Data Source Column Window	43
	Text-Based Column Types Details	43
	Hyperlink Column Type Details	44
	Currency Column Type Details	46

<b>3</b>	<b>Creating and Maintaining Portlet Definitions</b>	<b>47</b>
	Overview of Portlet Definitions	47
	HP-Supplied Portlet Definitions	48
	HP-Imported Portlet Definitions	49
	Imported Java and WSRP Portlet Definitions	49
	Standard Portlet Definitions	49
	Searching for Existing Portlet Definitions	50
	Creating New Portlet Definitions	53
	Copying Portlet Definitions	64
	Modifying Portlet Definitions	65
	Deleting Portlet Definitions	68
	Importing Java Portlet Definitions	69
	Importing WSRP Portlet Definitions	73
	Migrating Portlet Definitions	77
	Defining a Drill-down Page	78
	Usage Example	78
	Defining a Drill-down Page	80
	Usage Samples	84
	DEMO - Pie Chart Portlet	84
	DEMO - Request List Portlet - 1	88
	DEMO - Request List Portlet - 2	91
	Defining a Portlet Event	94
	Managing Portlet Categories	97
	Adding Portlet Categories	97
	Deleting Portlet Categories	98
	Supplemental Details for the Set Up Display Option Step	99
	List Portlet	99
	Adding Columns	101
	Editing Columns	105
	Deleting Columns	106
	Bar Chart Portlet	106
	Clustered Bar Chart Portlet	109
	Stacked Bar Chart Portlet	112
	Pie Chart Portlet	114
	Line Chart Portlet	116
	Bubble Chart Portlet	118

Selecting Portlet Colors . . . . .	120
Defining Color Maps in the Portlet Data Source . . . . .	120
Specifying the Color Map in the Portlet Definition . . . . .	123
<b>4 Creating and Maintaining PPM Dashboard Pages and Modules . . . . .</b>	<b>127</b>
About PPM Dashboard Pages and Modules . . . . .	127
Preconfigured Dashboard Pages . . . . .	127
HP-Provided Preconfigured Pages . . . . .	127
Application Administrator-Provided Preconfigured Pages . . . . .	128
Shared Dashboard Pages . . . . .	129
Searching for Modules . . . . .	129
Creating Modules . . . . .	132
Sharing Modules . . . . .	135
Copying Modules . . . . .	136
Modifying Modules . . . . .	137
Deleting Modules . . . . .	138
<b>A Color Names . . . . .</b>	<b>139</b>
<b>Index . . . . .</b>	<b>147</b>



---

# 1 Getting Acquainted with the Standard Interface

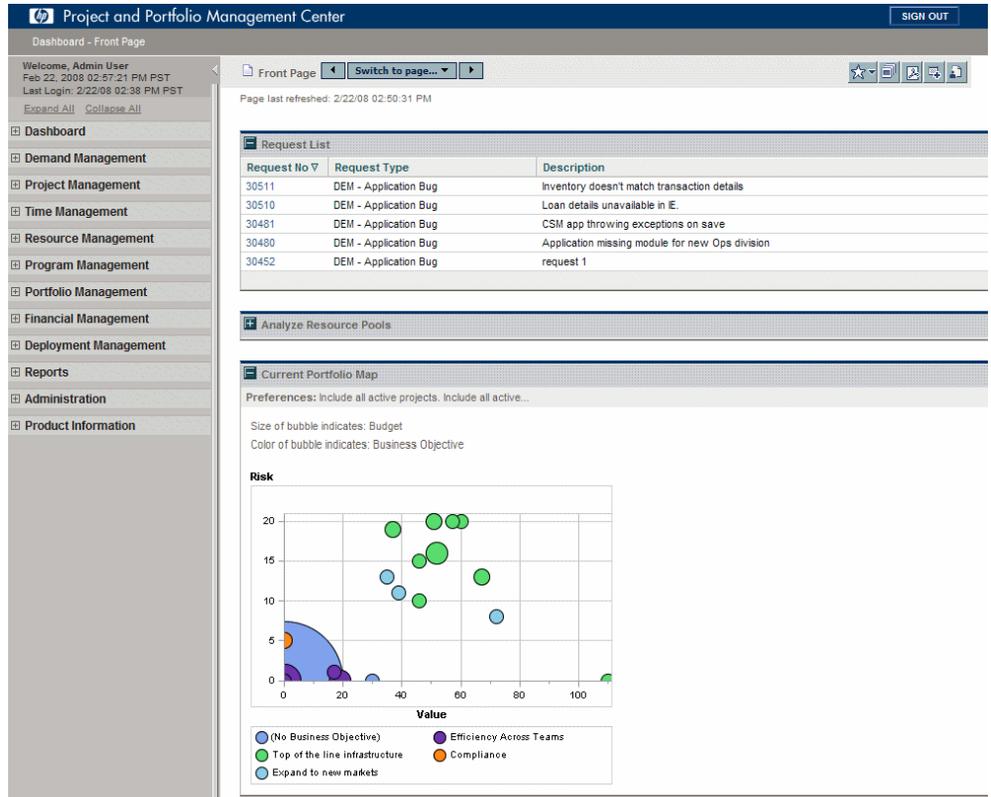
## Introduction to the Standard Interface

Most HP Project and Portfolio Management Center (PPM Center) users work solely in the standard interface, although some may use the PPM Workbench as well. The standard interface opens in your Web browser, and from it, you can run reports, create requests, and search for packages, among other things.

A key feature of PPM Center is the PPM Dashboard, which provides you with a real-time view into your PPM Center–based activities.

Using the PPM Dashboard’s portlets, you can view almost anything, from the status of requests assigned to you, to comparisons between current projects and staffing profiles. *Figure 1-1* shows a PPM Dashboard page that relies on three HP-supplied portlets: Request List, Analyze Resource Pools, and Current Portfolio Map.

Figure 1-1. Personalized PPM Dashboard page



When you first log on to PPM Center, you are presented with a PPM Dashboard page. The choice of PPM Dashboard page depends on how you personalized your pages; however, HP does provide a default page named Front Page (Standard PPM Dashboard).

For more information about logging on to PPM Center, see the *Getting Started* guide.

# Overview of Creating Portlets and Modules

Managers (or other lead personnel) can create, maintain, and share *configured* Dashboard pages and portlets to facilitate communication and coordination for their own projects. For example, your recruiting organization might share the list of current job openings.

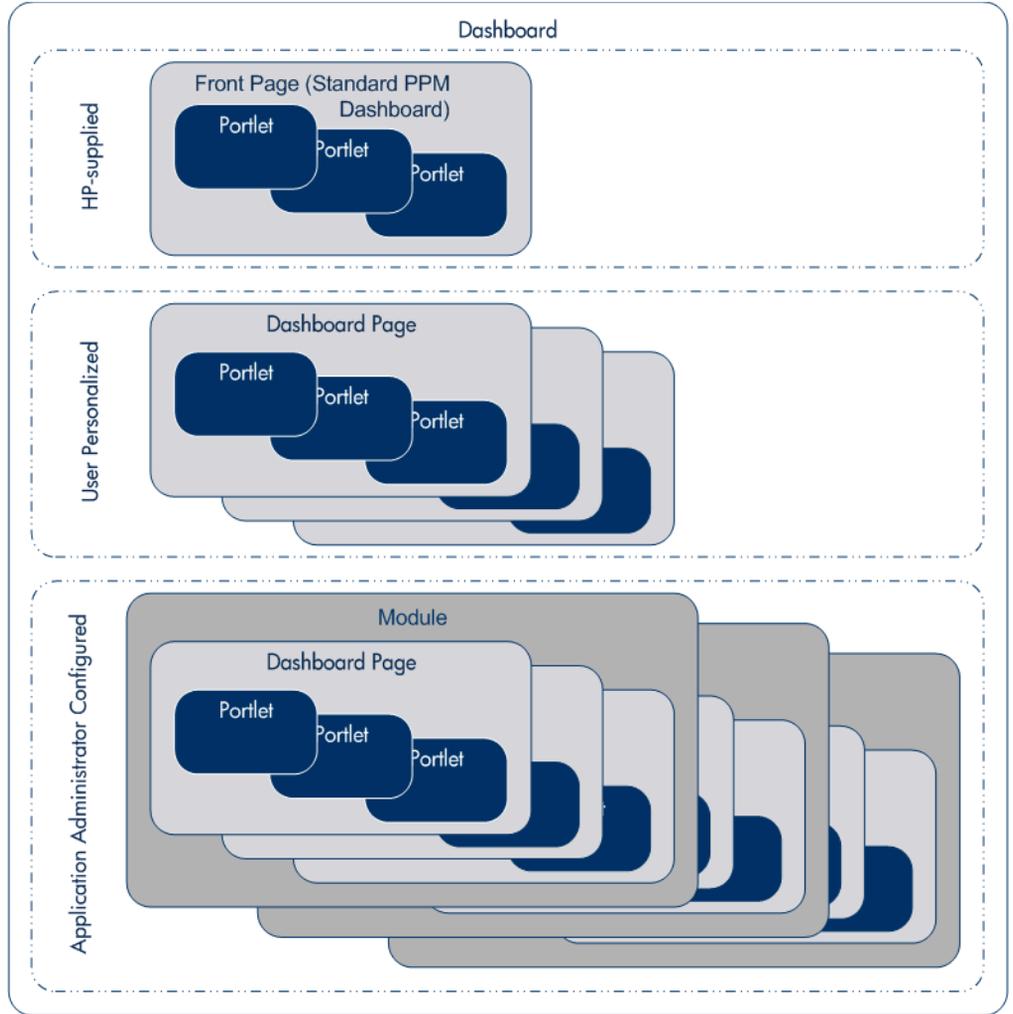
Configuring the standard interface in this manner provides a mechanism for managers to share real-time information up and/or down the chain of command.



The individuals who plan, set up, and maintain HP-based applications are generally called application administrators (or configurators) and their responsibilities may also include configuring PPM Dashboard pages.

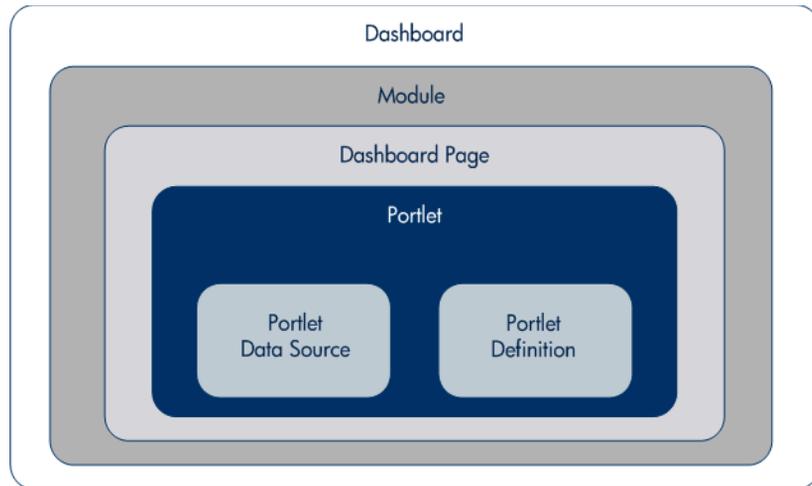
*Figure 1-2* provides a visual overview of the different types of Dashboard pages. This document focuses on the application administrator-configured Dashboard pages; however, [Chapter 4, \*Creating and Maintaining PPM Dashboard Pages and Modules\*, on page 127](#) briefly describes how users can add preconfigured Dashboard pages.

Figure 1-2. Various types of PPM Dashboard pages



*Figure 1-3* details the major components that make up configured Dashboard pages and depicts their relationships.

Figure 1-3. PPM Dashboard components



- **Dashboard.** The PPM Dashboard is one of the key applications provided with PPM Center.

In addition to the pre-installed Front Page and optional user-personalized Dashboard pages, the PPM Dashboard can include one or more modules.

- **Module.** A module is the container for one or more Dashboard pages.

Modules are created much like a Dashboard page is personalized by an individual user. Modules are created by application administrators.

- **Dashboard page.** A Dashboard page is the container for one or more portlets.

Dashboard pages within a module can be added, modified, and deleted. Similarly, on each Dashboard page, portlets can be added, modified, or deleted.

- **Portlet.** Portlets are the key visualization component of the PPM Dashboard and display information relevant to your PPM Center data. HP provides numerous portlets and additional (personalized or configured) portlets can be created.

In general, portlets rely on the following:

- **Portlet data sources.** For builder portlets, these are typically the SQL queries used to gather the information from the PPM Center database. Other data sources include Web pages and RSS feeds.
- **Portlet definitions.** These are files that define the look and feel of a portlet and can be customized. Portlet definitions can include such information as the type of portlet, user and group access to the portlet, and filter field definitions.

## Standards-Based Portlet Support

PPM Center is a Java™-compliant portal, and provides support for Java-compliant portlets that are not included with PPM Center. Java portlets can be developed using the Java API, purchased from vendors (such as Sun Microsystems), or obtained with products (such as WebLogic Portal).

WSRP-compliant portlets are also supported by PPM Center. Web Services for Remote Portlets (WSRP) allows portals to publish portlets so that other portals can “consume” them. Use of WSRP portlets simplifies integration between systems and can reduce programming overhead as well as provide continuity for users of multiple systems.

PPM Center provides support for JSR 168 and WSRP standards-compliant portlets. This support is based on the Apache Reference implementations of two specifications: Pluto and WSRP4J. However, the specifications may not be complete in all areas or may be open to interpretation. HP has made design decisions to cover these areas.



HP is committed to provide support for customers implementing these types of portlets, including debugging and diagnosing problems related to the PPM Dashboard. HP does not extend that support to cover the debugging of custom portlet code or configuration files.

To facilitate diagnosis, customers reporting problems to the HP Software Support Web site ([hp.com/go/hpssoftwaresupport](http://hp.com/go/hpssoftwaresupport)) are required to provide a simple, reproducible case that demonstrates the error in the PPM Dashboard.

# The Configuration Process

Configuring the standard interface requires steps relating to both creating portlets and making them available. In general, the process is as follows:

## **Step 1: Create a portlet.**

1. Create a portlet data source. See [Chapter 2, \*Creating and Maintaining Portlet Data Sources\*, on page 17](#), for specifics.
2. Create a portlet definition. See [Chapter 3, \*Creating and Maintaining Portlet Definitions\*, on page 47](#), for more information.

## **Step 2: Create and share a module and its Dashboard page(s).**

See [Chapter 4, \*Creating and Maintaining PPM Dashboard Pages and Modules\*, on page 127](#), to learn more about these topics.

## Related Information

The following documents also include information related to creating and sharing portlets and modules:

- *Commands, Tokens, and Validations Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*

The following documents also provide insights into the user experience with PPM Dashboard pages:

- *Customizing the Standard Interface*
- *Getting Started*



---

## 2 Creating and Maintaining Portlet Data Sources

### Overview of Portlet Data Sources

Portlet data sources contain the following components:

- The filter fields found on the edit page for the portlet.
- The permissions allowing editing of the portlet data source.
- The SQL query used by the portlet definition to retrieve data from the PPM Center database.

A portlet data source SQL query consists of the following:

- **SELECT/FROM.** This statement is used to select columns from the designated database table.

These columns are used by the portlet definition, such as a column in a list portlet or the x-axis in a bubble chart portlet.

For example:

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V
```

- **WHERE.** This clause is used to specify selection criterion.

For example:

```
WHERE LOCKED_FLAG="Y"
```

- **GROUP BY or ORDER BY.** These keywords are used to aggregate or sort the result.

For example:

```
ORDER BY OBJECT_TYPE
```

The following is a complete SQL query for a portlet data source:

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

Portlet definitions and portlet data sources have the following relationships:

- A portlet definition can be linked to only one portlet data source.
- A portlet data source can be linked to multiple portlet definitions.

Portlet data sources are constructed using the Data Source Workbench (sometimes called the Data Source Builder).

From the Data Source Workbench you can:

- Search for and view portlet data sources; see *Searching For and Viewing Existing Portlet Data Sources*
- Create new portlet data sources or modify existing ones; see *Creating or Modifying Portlet Data Sources* on page 21
- Use existing portlet data sources as the basis for new portlet data sources; see *Copying Portlet Data Sources* on page 39
- Delete existing portlet data sources; see *Deleting Portlet Data Sources* on page 40
- View portlet definition usage; see *Viewing Portlet Definition Usage* on page 42

HP-supplied portlet data sources cannot be modified or deleted.

# Searching For and Viewing Existing Portlet Data Sources

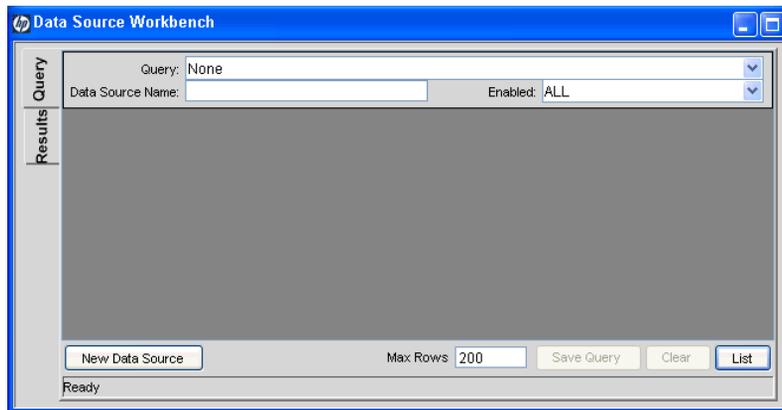
To search for a portlet data source:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.



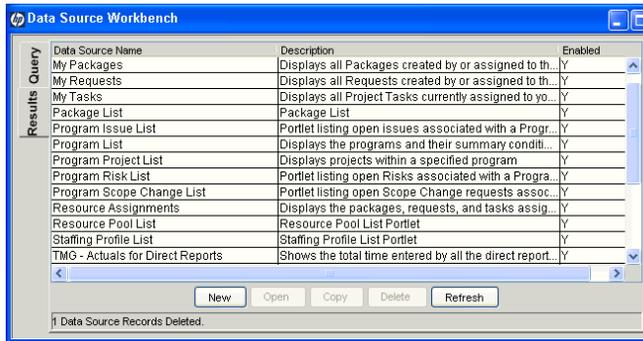
4. On the **Query** tab, provide the search criteria.



To display all portlet data sources, click **List** without providing any search criteria.

5. Click **List**.

The **Results** tab appears, displaying the results of the search.



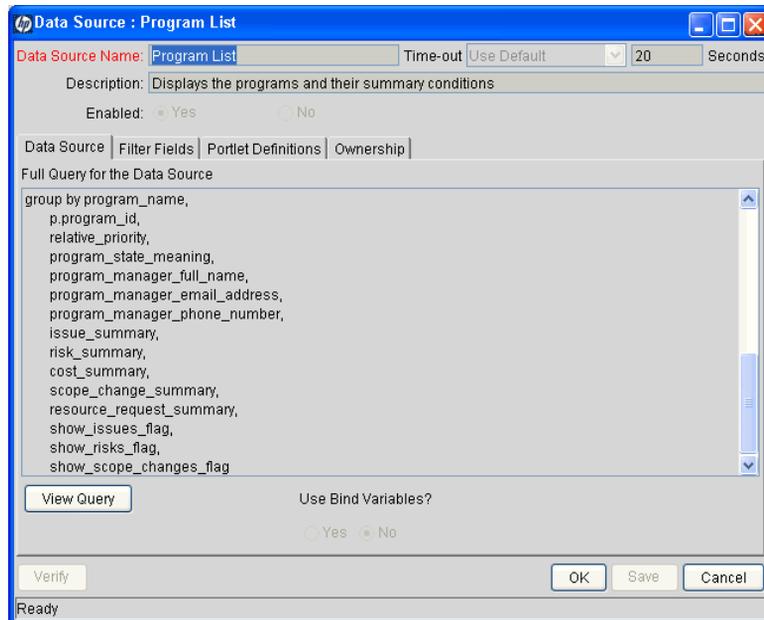
6. (Optional) To view a portlet data source, either:

- Double-click a portlet data source.
- Select a portlet data source and click **Open**.



Use the **shift** or **ctrl** keys to select multiple portlet data sources.

The Data Source : *<Data Source Name>* window opens.



# Creating or Modifying Portlet Data Sources

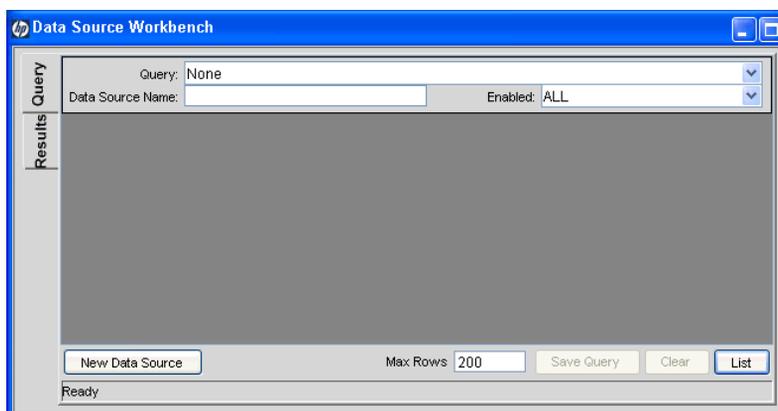
To update an existing portlet data source, or to create an entirely new portlet data source:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.

The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

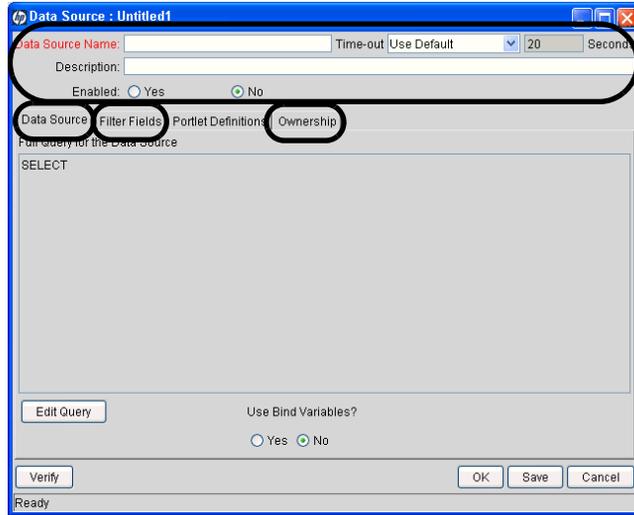


4. To:
  - Create an entirely new portlet data source, either:
    - On the **Query** tab, click **New Data Source**.
    - On the **Results** tab, click **New**.
  - Modify an existing portlet data source:
    - View the portlet data source (as described in *Searching For and Viewing Existing Portlet Data Sources* on page 19).



HP-supplied portlet data sources cannot be modified.

The Data Source : *<Data Source Name>* window opens.



5. Provide information for each of the following areas before proceeding to the next step.
  - **General information.** Use these fields to set general information regarding the portlet data source, such as the name of the portlet data source and its description. See [Completing the General Information Section on page 24](#) for details.
  - **Data Source.** Use this tab to define the columns of the portlet data source and create the SQL query. See [Completing the Data Source Tab on page 26](#) for details.
  - **Filter Fields.** Use this tab to create the filter fields found on a portlet's edit page. See [Completing the Filter Fields Tab on page 35](#) for details.
  - **Ownership.** Use this tab to set who can edit the portlet data source. See [Completing the Ownership Tab on page 37](#) for details.



The **Portlet Definitions** tab is used to identify which portlet definitions rely on this portlet data source. A new portlet data source will not have any portlet definitions associated with it.

This tab is detailed in [Viewing Portlet Definition Usage on page 42](#).

6. (Optional) At any time, you can click **Save** to commit your changes. See the tip following *Table 2-1* for additional considerations and suggestions.

You can also click **Cancel** to discard any changes. However, if you have provided a unique **Data Source Name** and clicked **Save** (at least once), the portlet data source has been created with the information entered as of the last **Save**.

7. (Optional, although highly recommended) On the Data Source : *<Data Source Name>* window, click **Verify** to validate the SQL statement.

Make any necessary corrections to the SQL by clicking **Edit Query** on the **Data Source** tab.

8. Click **OK** to save your changes and close the window.

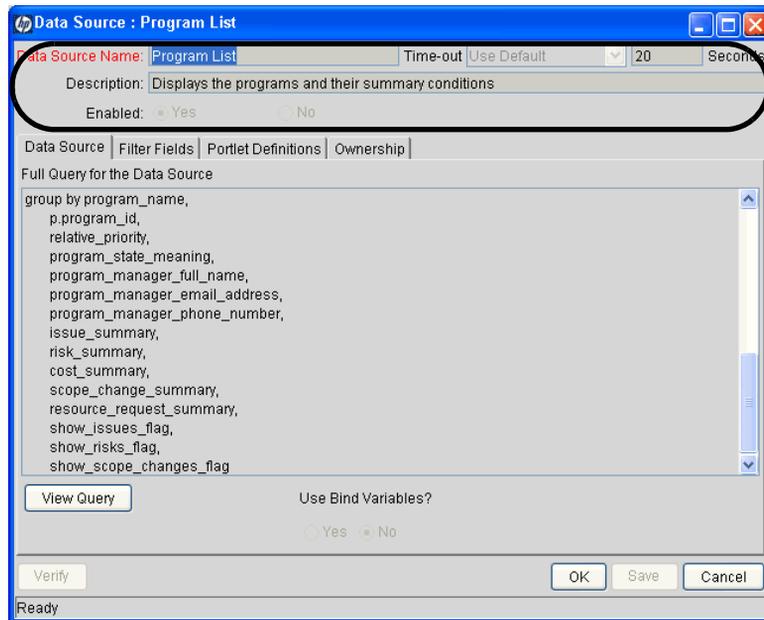
The Data Source : *<Data Source Name>* window closes and the Data Source Workbench is updated.



On the **Results** tab, click **Data Source Name** to have the portlet data sources appear in alphabetical sequence. Clicking **Data Source Name** a second time reverses the sort order.

## Completing the General Information Section

Figure 2-1. General information area for portlet data sources



To complete (or update) the general information area of the Data Source : *<Data Source Name>* window:

1. Provide the settings using the information from the following table.

Table 2-1. Portlet data source general information field descriptions  
(page 1 of 2)

Field Name (*Required)	Description
*Data Source Name	Specify a unique name for the portlet data source. Type any alphanumeric string.
Time-out	Select the timeout to use. Choices include: <ul style="list-style-type: none"> <li>• Use Default</li> <li>• Data Source Specific</li> </ul>

Table 2-1. Portlet data source general information field descriptions  
(page 2 of 2)

Field Name (*Required)	Description
Seconds	The number of seconds to wait before the portlet data source's query times out. If the <b>Time-out</b> field has a value of <b>Use Default</b> , this field displays the default time-out value used. If the <b>Time-out</b> field has a value of <b>Data Source Specific</b> , specify the time-out value. Type any integer greater than zero.
Description	Specify a description for the portlet data source. Type any alphanumeric string.
Enabled	Indicate whether or not this portlet data source is available for use.

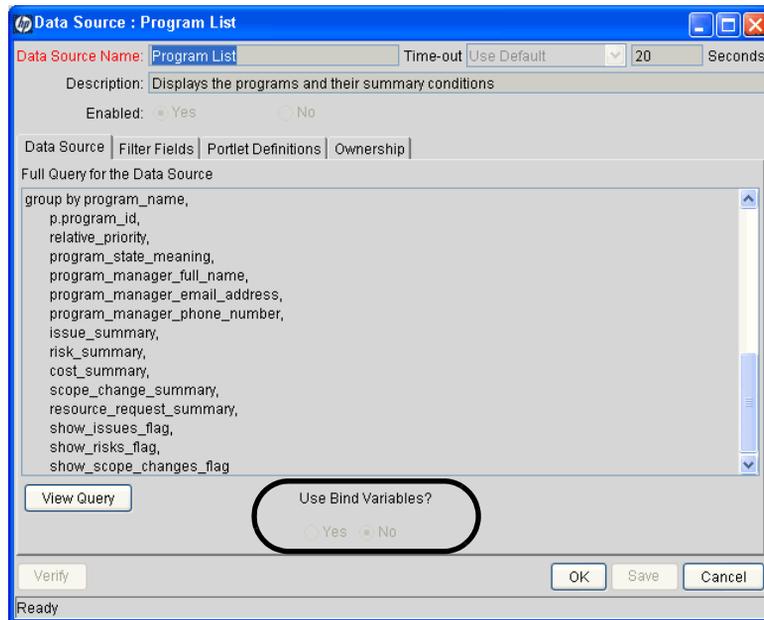


To allow incremental saving of your settings without impacting any users, set the **Enabled** field to **No** when initially defining the portlet data source. Once the portlet data source definition is complete, reset this field to **Yes**.

2. (Optional) Click **Save** to commit these changes.

## Completing the Data Source Tab

Figure 2-2. Data Source tab for portlet data sources



To complete (or update) the **Data Source** tab of the Data Source : <Data Source Name> window:

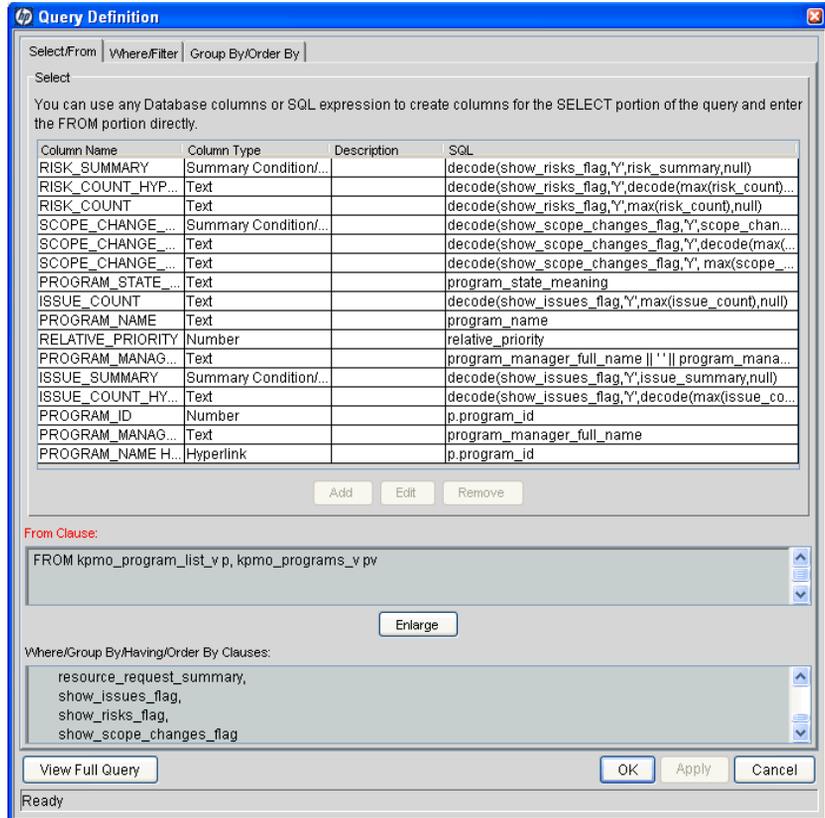
1. Set **Use Bind Variables**.

The **Use Bind Variables** option should be set to **Yes**, except when:

- Any of the filter fields are multi-select-enabled
- The portlet query statement includes tokens

## 2. Click **Edit Query**.

The Query Definition window opens.



## 3. Provide the following information before proceeding to the next step.

- **Select/From.** Use this tab to create the columns and add the SELECT and FROM clauses for the SQL query. See [Completing the Select/From Tab](#) for details.
- **Where/Filter.** (Optional) Use this tab to add WHERE clauses to the SQL query. See [Completing the Where/Filter Tab on page 30](#) for details.
- **Group By/Order By.** (Optional) Use this tab to add GROUP BY or ORDER BY clauses. See [Completing the Group By/Order By Tab on page 33](#) for details.

4. (Optional) Click **View Full Query** to see the entire SQL query—the composite of the information from each of the tabs.
5. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

## Completing the Select/From Tab

The **Select/From** tab allows you to construct the SQL query the portlet data source executes.

- **Select.** This statement identifies one or more columns to be included in the query.

For example, the following shows a complete SQL query for a portlet data source (the SELECT statement portion of the SQL query is shown in italics):

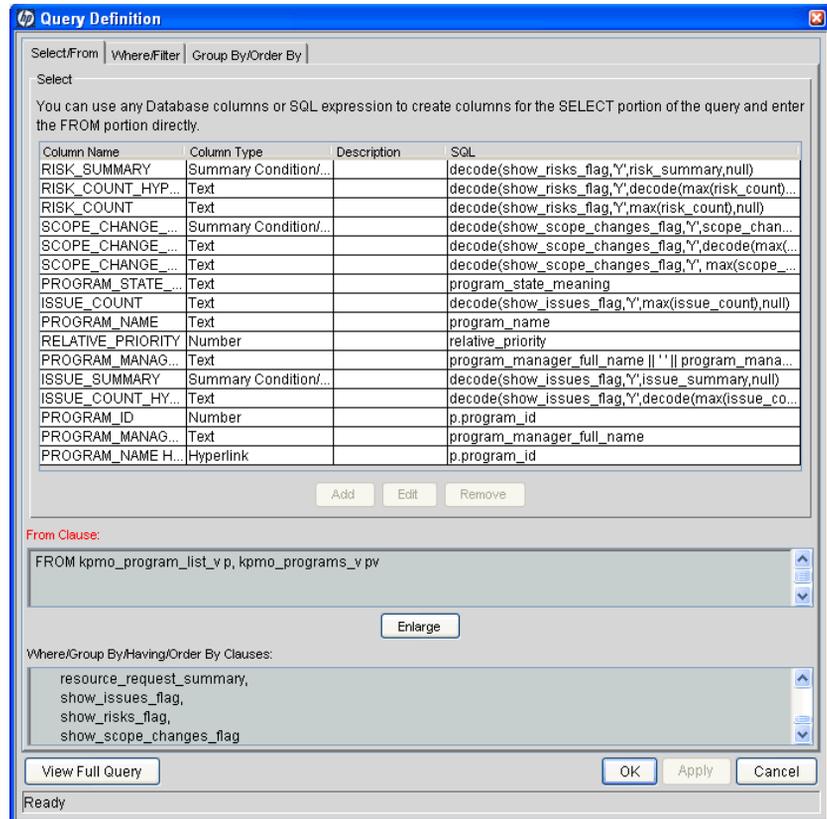
```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

- **From.** This clause selects the table from which the columns are selected.

For example, the following shows a complete SQL query for a portlet data source (the FROM clause portion of the SQL query is shown in italics):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

Figure 2-3. Select/From tab of the Query Definition window



To complete (or update) the **Select** section on the **Select/From** tab in the Query Definition window:

1. (Optional) To change the settings for any existing column:

- a. Select a column.
- b. Click **Edit** in the **Select** section.

The Data Source Column. <Column Name> windows opens.

- c. The information that should be provided depends on the Column Type. See *Supplemental Details for the Data Source Column Window* on page 43 for the details associated with each column type.

- d. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.
2. (Optional) To include a new column.
    - a. Click **Add** in the **Select** section.  
The Data Source Column: New window opens.
    - b. The information that should be provided depends on the Column Type. See *Supplemental Details for the Data Source Column Window* on page 43 for the details associated with each column type.
    - c. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.
  3. Repeat [step 1](#) and [step 2](#) until all the desired columns are included.
  4. In the **From Clause** section of the **Select/From** tab of the Query Definition window, complete the associated clause.

This is a free-form SQL entry area.



Click **Enlarge** to create a larger text entry field.

5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Where/Filter Tab

The **Where/Filter** tab allows you to construct the SQL query the portlet data source executes.

- **Where.** This clause is used to specify the selection criteria.

For example, the following shows a complete SQL query for a portlet data source (the WHERE clause portion of the SQL query is shown in italics):

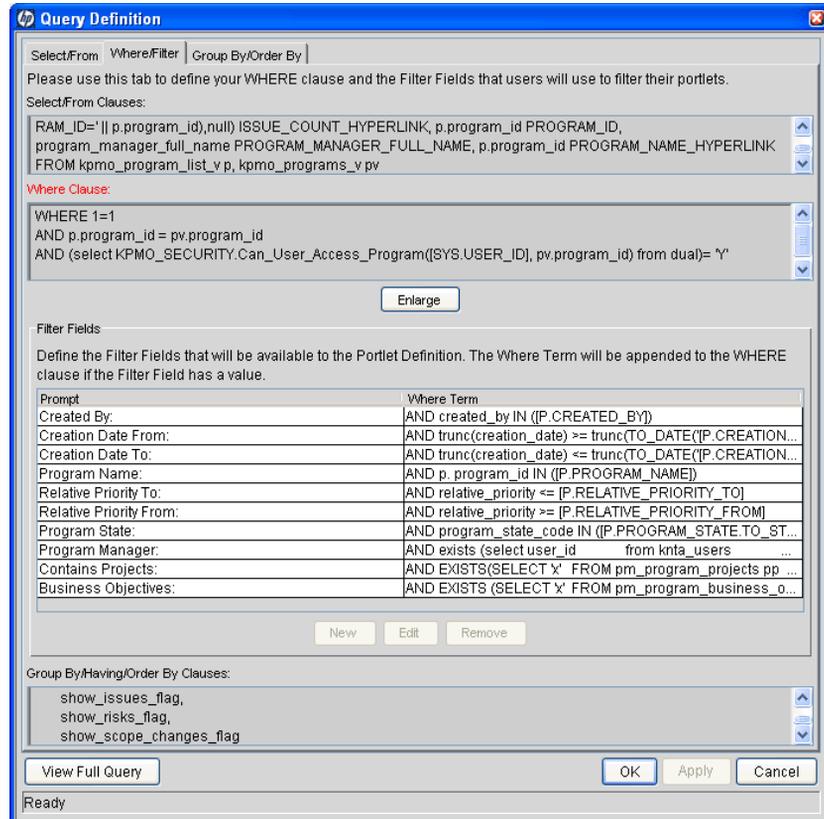
```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

- **Filter.** This clause is used to specify the filter fields that appear on the portlet's edit page.

Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a PPM Dashboard user.

Filter field values can be used in the SQL by using the token name P . TOKEN\_NAME or VP . TOKEN\_NAME.

Figure 2-4. Where/Filter tab of the Query Definition window



To complete (or update) the **Where Clause** section on the **Where/Filter** tab in the Query Definition window:

1. Complete the associated clause.

The **Where Clause** section defines the WHERE clause of the portlet query.

This is a free-form SQL entry area.



Click **Enlarge** to create a larger text entry field.

2. (Optional) To change the settings for an existing filter field:

- a. Select a filter field.
- b. Click **Edit** in the **Filter Fields** section.

The Filter: *<Filter Field>* window opens.

- c. Provide the data as detailed in [Completing the Filter Fields Tab on page 35](#).
- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

3. To include a new filter field:

- a. Click **New** in the **Filter Fields** section.

The Filter: New window opens.

Adding filter fields here has the same results as adding filter fields using the **Filter Fields** tab as the Data Source : *<Data Source Name>* window.

The difference in the two areas is how the information is visually displayed.



- In the **Filter Fields** section of the Query Definition window, the SQL clauses are displayed.
- On the **Filter Fields** tab of the Data Source : *<Data Source Name>* window, the PPM Center entities are displayed.

- b. Provide the data as detailed in [Completing the Filter Fields Tab on page 35](#).

- c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.
4. Repeat [step 2](#) and [step 3](#) until all the desired filter fields are included.
5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Group By/Order By Tab

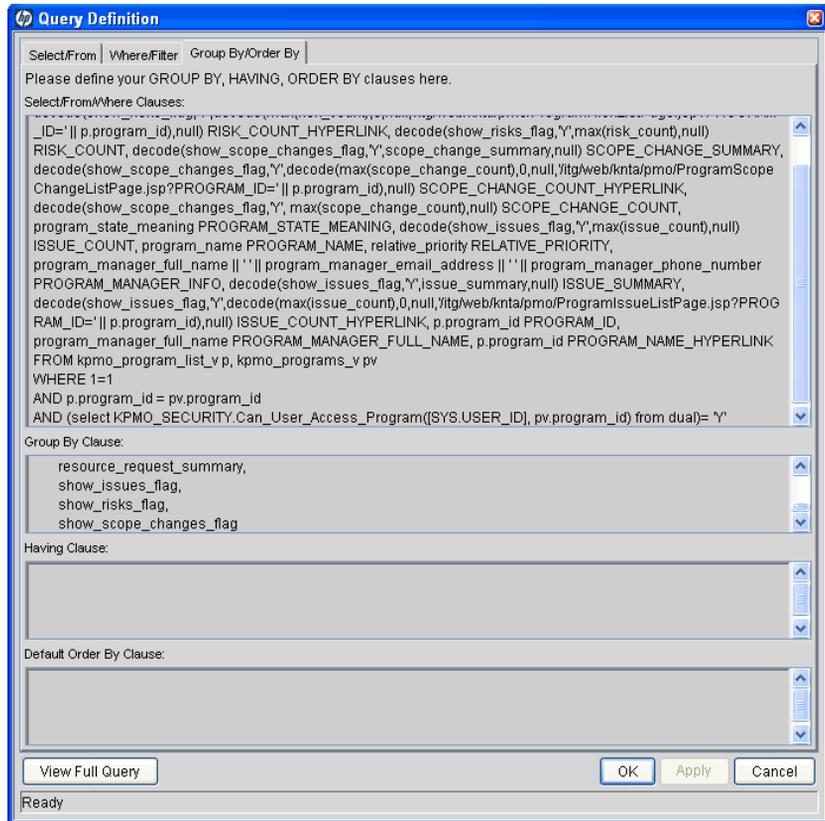
The **Group By/Order By** tab allows you to refine the SQL query the portlet data source executes.

- **GROUP BY.** Adds a keyword to aggregate the result.
- **ORDER BY.** Adds a keyword to sort the result.

For example, the following shows a complete SQL query for a portlet data source (the ORDER BY portion of the SQL query is shown in *italics*):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

Figure 2-5. Group By/Order By tab of the Query Definition window



To complete (or update) the **Group By/Order By** tab in the Query Definition window:

1. In the **Group By Clause** section, provide the GROUP BY or ORDER BY terms.

This is a free-form SQL entry area.

2. In the **Having Clause** section, provide the HAVING terms.

This is a free-form SQL entry area.

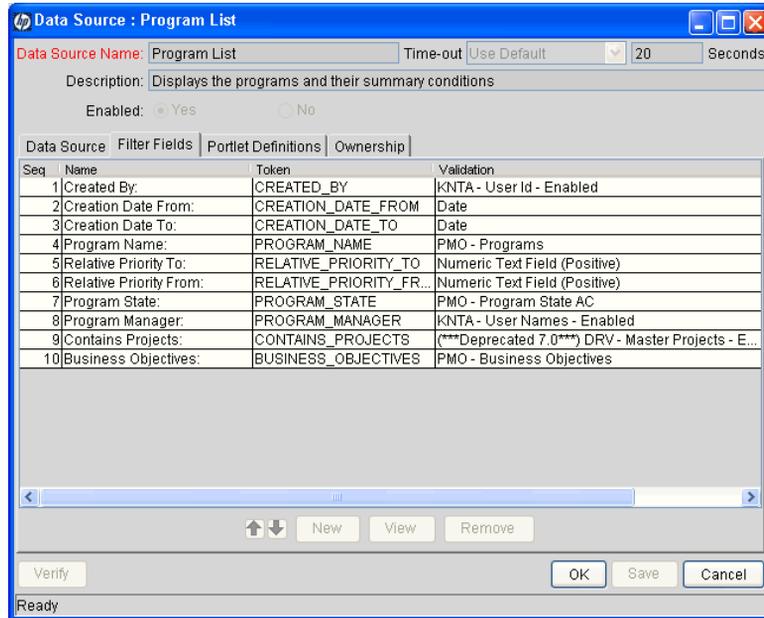
3. In the **Default Order By Clause** section, provide the default ORDER BY terms.

This is a free-form SQL entry area.

4. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Filter Fields Tab

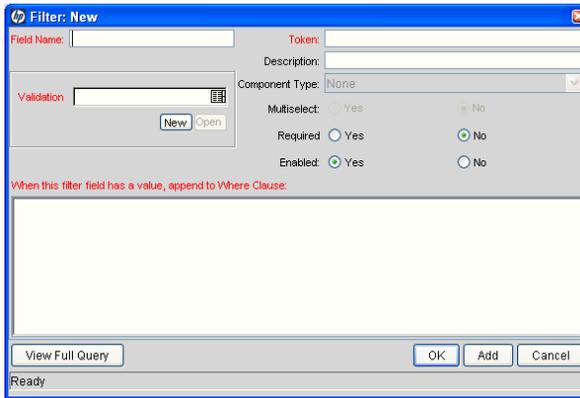
Figure 2-6. Filter Fields tab for portlet data source



To complete (or update) the Filter Fields tab in the Data Source : *<Data Source Name>* window:

1. (Optional) To change the settings for an existing filter field:
  - a. Select a filter field.
  - b. Click **Edit**.

The Filter: *<Filter Field>* window opens.



- c. Provide the filter criteria using the information from the following table.

Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a PPM Dashboard user.



Filter field values can be used in the SQL by using the token name `P.TOKEN_NAME` or `VP.TOKEN_NAME`.

Field Name (*Required)	Description
*Field Name	Specify a name for the filter field that should be shown in the portlet's edit page. Type any alphanumeric string.
*Token	Specify the token for the filter field.
Description	Specify a description for the filter field. Type any alphanumeric string.
*Validation	Select the validation for the filter field. Choices are limited to those validations available on your PPM Center instance.
Multiselect	Indicate whether or not the filter field is enabled for multi-select.

Field Name (*Required)	Description
Required	Indicate whether or not the filter field is required on the portlet's edit page.
Enabled	Indicates whether or not the filter field is enabled.
*When this filter has a value, append to Where Clause	Provide the AND clause that is appended to the portlet's WHERE clause if you enter a value in this filter field.

- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.
2. (Optional) To include a new filter field:
    - a. Click **New**.  
The Filter: New window opens.
    - b. Provide the filter criteria using the information from the previous table.
    - c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.
  3. Repeat [step 1](#) and [step 2](#) until all the desired filter fields are included.
  4. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Ownership Tab

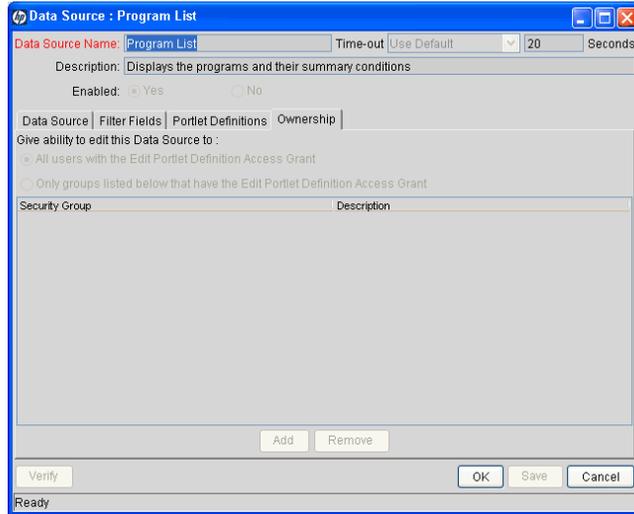
Only members of the security groups specified in the Ownership window can edit, copy, or disable a specific portlet. If a security group is disabled or the System: Edit Portlet Definition access grant is removed, that group no longer has access to the portlet.

If no ownership groups are associated with the entity, the entity is considered global and any user with the proper edit access grant for the entity can edit, copy, or disable it. Users with the System: Ownership Override access grant can access configuration entities even if the user is not a member of one of the ownership groups and does not have the specific edit access grant.



For more information concerning access grants, refer to the *Security Model Guide and Reference*.

Figure 2-7. Ownership tab for the portlet data source



To complete (or update) the **Ownership** tab in the Data Source : <Data Source Name> window:

1. Indicate whether to allow changes to the portlet data source to be made by:
  - All users with the System: Edit Portlet Definition access grant
  - Only groups listed below that have the System: Edit Portlet Definition access grant

Use the **Add** and **Remove** buttons to refine the list of allowed users.

2. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

# Copying Portlet Data Sources

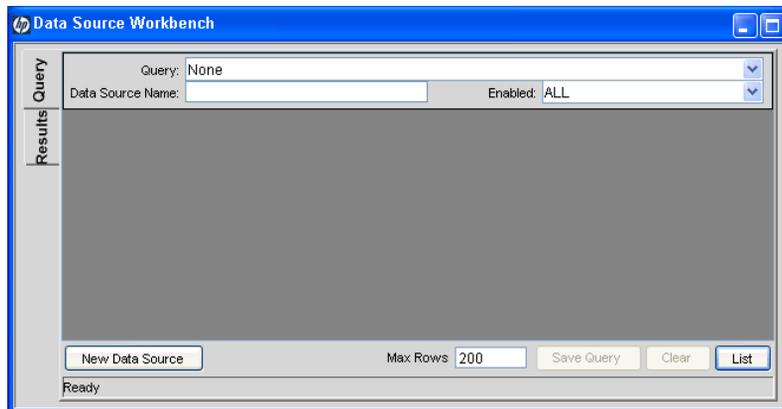
To create a new portlet data source using an existing portlet data source as the basis:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.

The PPM Workbench opens.

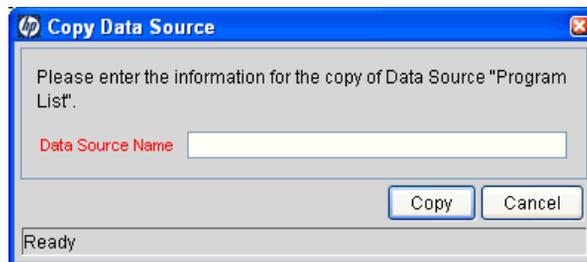
3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.



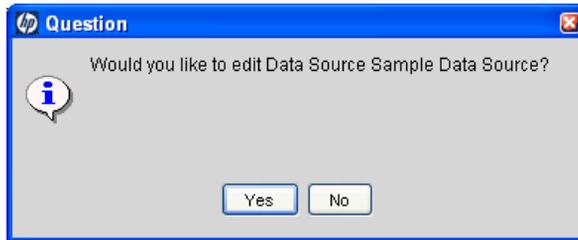
4. Search for and select a portlet data source (see *Searching For and Viewing Existing Portlet Data Sources* on page 19).
5. Click **Copy**.

The Copy Data Source window opens.



6. In the **Data Source Name** field, specify a unique name for the portlet data source.
7. Click **Copy**.

The Question window opens.



8. Click **Yes** if you would like to edit the portlet data source. Otherwise, click **No**.
9. (Optional) If you clicked **Yes** in the previous step, modify the portlet data source using the information described in *Creating or Modifying Portlet Data Sources* on page 21.

## Deleting Portlet Data Sources

To delete an existing portlet data source:

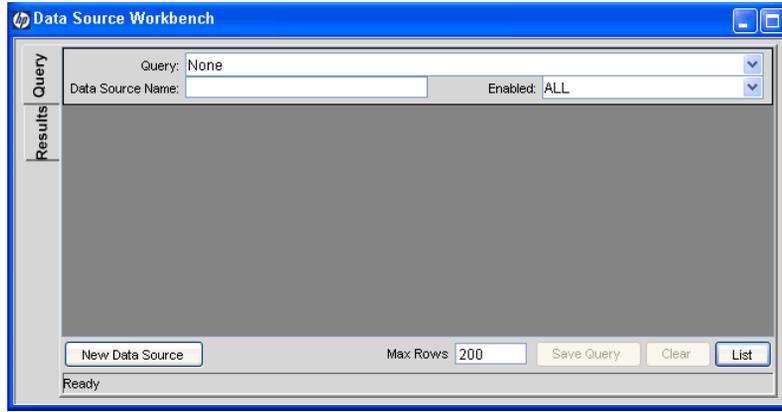
▶ HP-supplied portlet data sources cannot be deleted.

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Open Workbench**.

The PPM Workbench opens.

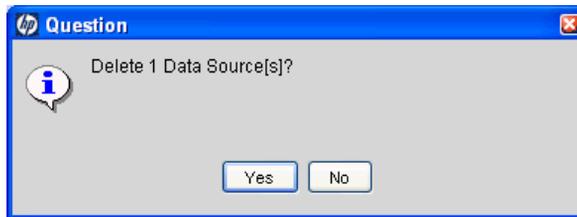
3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.



4. Search for and select one or more portlet data sources (see *Searching For and Viewing Existing Portlet Data Sources* on page 19).
5. Click **Delete**.

The Question window opens.



6. Click **Yes** to remove the portlet data source(s). Otherwise, click **No**.

If you clicked **Yes**, the Data Source Workbench is updated (and the deleted portlet data source no longer appears in the list).

# Viewing Portlet Definition Usage

The **Portlet Definitions** tab allows you to view all of the portlet definitions currently linked to the portlet data source.

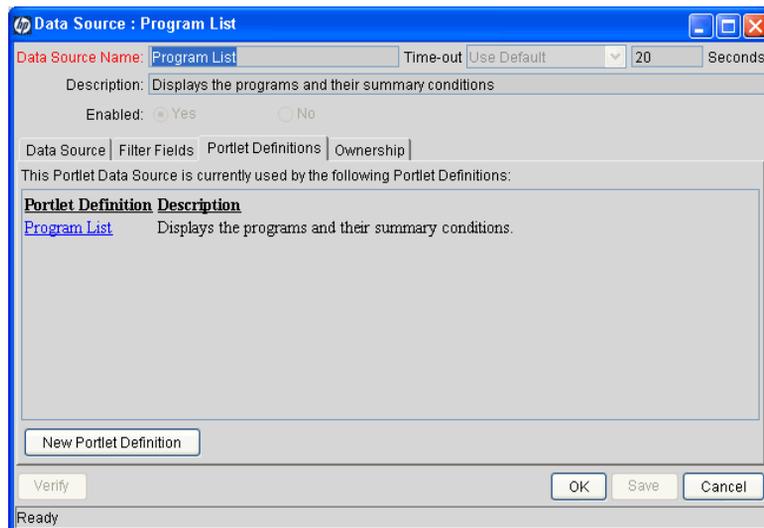
From the Portlet Data Source window, on the **Portlet Definitions** tab, you can:

- View all of the portlet definitions linked to the portlet data source.

Remember that portlet definitions and portlet data sources have the following relationships:

- A portlet definition can be linked to only one portlet data source.
- A portlet data source can be linked to multiple portlet definitions.
- Open the portlet definition by clicking on the portlet definition name. This opens the Portlet Definition wizard. The Portlet Definition wizard is populated with the information for the selected portlet definition.
- Create a new portlet definition by clicking **New Portlet Definition**. This opens the Portlet Definition wizard.

Figure 2-8. Portlet Data Source window, Portlet Definitions tab



# Supplemental Details for the Data Source Column Window

Adding columns to the Query Definition window relies on the Data Source Column window. The fields of the Data Source Column window vary, depending on the column type selected.

See the associated details for the following column types:

- Text, Date, Number, or Summary Condition/Exception, see [Text-Based Column Types Details](#)
- Hyperlink, see [Hyperlink Column Type Details](#)
- Currency, see [Currency Column Type Details](#) on page 46

## Text-Based Column Types Details

Figure 2-9. Text-based column types in Data Source Column window

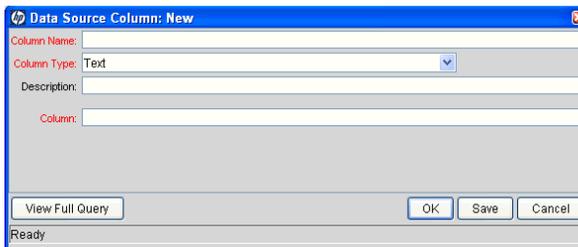


Table 2-2. Text-based column types field descriptions

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select one of the following: <ul style="list-style-type: none"> <li>• Text</li> <li>• Date</li> <li>• Number</li> <li>• Summary Condition/Exception</li> </ul>
Description	Specify a brief description of the column. Type any alphanumeric string.
*Column	Specify the database column name used for the column. Choices are limited to the column names available on your PPM Center instance.

## Hyperlink Column Type Details

Figure 2-10. Hyperlink column type in the Data Source Column window

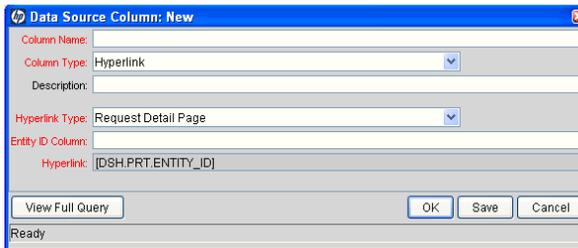


Table 2-3. Hyperlink column type field description (page 1 of 2)

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select <b>Hyperlink</b> .

Table 2-3. Hyperlink column type field description (page 2 of 2)

Field Name (*Required)	Description
Description	Specify a brief description of the column. Type any alphanumeric string.
*Hyperlink Type	<p>Select the type of hyperlink to create from this column.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• Request Detail Page</li> <li>• Package Detail Page</li> <li>• Task Detail Page</li> <li>• Project Detail Page</li> <li>• Project Overview Page</li> <li>• Custom Hyperlink</li> </ul> <p>When <b>Custom Hyperlink</b> is selected, the <b>Hyperlink</b> field becomes editable and required. Otherwise, the <b>Hyperlink</b> field is read-only and displays a preview of the link is created (for example, <code>/itg/crt/RequestDetail.jsp?REQUEST_ID=[PRT.ENTITY_ID]</code>).</p>
*Entity ID Column	<p>Specify the SQL expression used to make a column in the final query.</p> <p>This column should contain values which are Request IDs (such as, Request Detail Page type Hyperlinks).</p> <p>In the case of the <b>Custom Hyperlink</b>, the values from this column are used to resolve the token <code>PRT.ENTITY_ID</code>, which can be used in the text of the hyperlink.</p>
*Hyperlink	<p>Specify the actual hyperlink text, which should be of one of the following forms:</p> <ul style="list-style-type: none"> <li>• <code>&lt;PPM_Home&gt;/some/page</code></li> <li>• <code>http://machine.server.com/page.html</code></li> </ul> <p>The valid tokens are <code>DSH.PRT.ENTITY_ID</code>, <code>DSH.PRT.ENTITY_ID.TO_URL</code>, and <code>SYS.USERNAME</code>.</p>

## Currency Column Type Details

Figure 2-11. Currency column type in the Data Source Column window

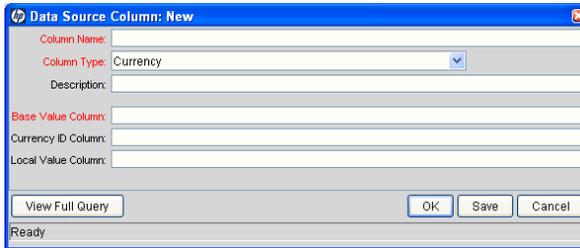


Table 2-4. Currency column type field descriptions

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select <b>Currency</b> .
Description	Specify a brief description of the column. Type any alphanumeric string.
*Base Value Column	Specify the column whose values are costs in the base currency that appears for the currency column.  These values are displayed if the user has configured their PPM Dashboard to show costs in the system's base currency.
Currency ID Column	Specify the column whose values are the ID of the local currency.  This value is never displayed; however, it is used to determine how the local currency value (see <a href="#">Local Value Column</a> ) is formatted.
Local Value Column	Specify the column whose values are costs in the local currency that appears for the currency column.  These values are displayed (and formatted appropriately for the selected currency) if the user configured their PPM Dashboard to show costs in the local currency.

---

# 3 Creating and Maintaining Portlet Definitions

## Overview of Portlet Definitions

PPM Center portlets include:

- **Builder Portlets.** These are portlets created with the Portlet Definition wizard and Data Source Workbench.  
  
HP supplies several builder portlets as part of PPM Center. You can create your own custom builder portlets using the Portlet Definition wizard and Data Source Workbench.
- **Java Portlets.** These portlets are written in Java and imported into PPM Center using the Portlet Definition wizard. Java portlets consist of a Java portlet definition and the Java code.
- **WSRP Portlets.** These portlets are defined by a producer Web service and imported into PPM Center using the Portlet Definition wizard. WSRP portlets have a WSRP portlet definition that references the URL of the WSRP portlet. That is, WSRP portlet definitions are a proxy to a remote portlet definition maintained by the producer and accessible through a Web service.

These PPM Center portlets rely on the following types of portlet definitions:

- **HP-supplied portlet definitions.** These portlet definitions are provided by HP as part of a PPM Center application.
- **HP-imported portlet definitions.** These portlet definitions are imported by HP as part of a PPM Center application.

- **Standard portlet definitions.** These portlet definitions are created using the Portlet Definition wizard (see *Creating New Portlet Definitions on page 53*).
- **Java portlet definitions.** These portlet definitions are imported using the Import Portlet Definition wizard (see *Importing Java Portlet Definitions on page 69*), maintained using the Portlet Definition wizard (see *Creating New Portlet Definitions on page 53*), and include portlet definitions such as RSS Reader and URL.
- **WSRP portlet definitions.** These portlet definitions are imported using the Import Portlet Definition wizard (see *Importing WSRP Portlet Definitions on page 73*) and maintained using the Portlet Definition wizard (see *Creating New Portlet Definitions on page 53*).

## HP-Supplied Portlet Definitions

PPM Center applications, such as HP Portfolio Management and HP Demand Management, may include their own portlet definitions.

These HP-supplied portlet definitions:

- Cannot be deleted
- Cannot have their displays or preferences changed in any way
- Can be modified by:
  - Copying portlet definitions
  - Changing user and administrator access
  - Changing user help (for builder portlets only)

## HP-Imported Portlet Definitions

PPM Center applications may include their own imported Java or WSRP portlet definitions.

These HP-imported portlet definitions:

- Cannot be deleted
- Can be modified by:
  - Changing user and administrator access
  - Changing general information

## Imported Java and WSRP Portlet Definitions

Any Java portlet definitions or WSRP portlet definitions that you have imported using the Import Portlet Definition wizard:

- Can be deleted
- Can be modified by:
  - Configuring user and administrator access
  - Changing general information

## Standard Portlet Definitions

Any standard portlet definitions that you have created using the Create Portlet Definition wizard:

- Can be deleted
- Can have *any* of their settings changed



These portlet definitions are sometimes termed “builder portlet definitions” since they are *built* using the Create Portlet Definition wizard.

# Searching for Existing Portlet Definitions

To search for an existing portlet definition.

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portlet Definitions > Configure Portlet Definitions**.

The Configure Portlet Definitions page appears.

Configure Portlet Definitions

Search for a Portlet Definition to Configure Reset Form

Name starts with:  Type:

Category:   Enabled:

Created By:

Sort By:   Ascending  Descending Results Displayed Per Page:

Search

3. Provide the search criteria using the information from the following table.

Field Name (*Required)	Description
Name starts with	Specify a string. The search results display all portlets whose name starts with the specified string. Type any alphanumeric string (up to 255 characters in length).
Type	Select the type of portlet definition: <ul style="list-style-type: none"><li>• List</li><li>• Bar Chart</li><li>• Clustered Bar Chart</li><li>• Stacked Bar Chart</li><li>• Pie Chart</li><li>• Line Chart</li><li>• Bubble Chart</li><li>• Java</li><li>• WSRP</li></ul>

Field Name (*Required)	Description
Category	Select one or more categories. Choices are limited to the categories available on your PPM Center instance.
Enabled	Indicated whether or not the portlet definition is enabled.
Created By	Select the user who created the module.
Sort By	Select the sort criteria. Choices include: <ul style="list-style-type: none"> <li>• Name</li> <li>• Type</li> <li>• Category</li> <li>• Enabled</li> </ul>
Ascending/Descending	Indicate the sorting sequence.
*Results Displayed Per Page	Specify the maximum number of search results to display on a page. Type any positive integer.



Click **Reset Form** if you would like to clear your current search criteria.

#### 4. Click **Search**.

The Configure Portlet Definitions page is updated to include the search results which are displayed in the **Configure Portlet Definitions** section.

## Configure Portlet Definitions

Configure Portlet Definitions					
Showing 1 to 11 of 11					
Name 	Description	Type	Category	Enabled	
TMG - Actuals for Direct Reports	Shows the total time entered by all the direct reports for a specific manager or set of managers	List	Time Management	Yes	
TMG - Delinquent Time Sheets	Shows Resources who have not submitted their Time Sheets for a given period.	Java	Time Management	Yes	
TMG - My Time Sheets	Displays the Time Sheets for the user during the last 10 time periods.	Java	Time Management	Yes	
TMG - My Work Items	Displays all the Work Items on open Time Sheets for the user. This portlet gives the user a quick snapshot on what he or she has been working on and is currently charging time to.	List	Time Management	Yes	
TMG - Resource Group Total by Work Item	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, by splitting the data by each specific Work Item. Though less frequently used, is useful when looking at a specific Resource Group.	List	Time Management	Yes	
TMG - Resource Group Totals	Displays the time charged by Resource Groups, summarizing the totals of all the Resources in those groups, letting you see the level of activity (by time) in the current and previous period for these groups.	List	Time Management	Yes	
TMG - Resource Totals	Displays the time charged by a set of resources, letting you see the level of activity (by time) in the current and previous period for these users.	List	Time Management	Yes	
TMG - Time Sheet Approvals	Displays Time Sheets that need approval by the current user.	Java	Time Management	Yes	
TMG - Total Hrs by Work Item	Displays detail information on the time allocated to and the time charged for specific Work Items. It shouldn't be used to display information for all Work Items but for a specific set based on filter criteria.	List	Time Management	Yes	
TMG - Work Allocation Details	Displays summary information on the work allocations defined in the system. It is especially helpful to see which allocations are close to being used up or actually are over budget.	List	Time Management	Yes	
TMG - Work Item Set Budget and Actuals	Displays summary information at the Work Item Set level. This portlet is useful to get a snapshot of which projects or types of activities you are spending the most time on as well as where you have budgeted the most time on.	List	Time Management	Yes	

Search for a Portlet Definition to Configure		Reset Form
Name starts with:	<input type="text" value="TM"/>	Type: <input type="text" value=""/>
Category:	<input type="text" value=""/>	Enabled: <input type="text" value=""/>
Created By:	<input type="text" value=""/>	
Sort By:	<input type="text" value="Name"/> <input type="radio"/> Ascending <input type="radio"/> Descending	Results Displayed Per Page: <input type="text" value="50"/>

From the Configure Portlet Definitions page you can:

- Select a portlet definition by clicking the link associated with the desired portlet definition (in the **Configure Portlet Definitions** section).
- Refine your search by providing additional search criteria as detailed in [step 3 on page 50](#) (in the **Search for a Portlet Definition to Configure** section).

# Creating New Portlet Definitions

To create an entirely new standard portlet definition, use the Create Portlet Definition wizard.

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portlet Definitions > Create a Portlet Definition**.

The Choose Portlet Type step of the Create Portlet Definition page appears.

**Create Portlet Definition**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

**Choose Portlet Type**

- List  Displays data in rows and columns.
- Bar Chart  Displays data in either vertical or horizontal bars.
- Clustered Bar Chart  Displays data in either vertical or horizontal bars; bars can be grouped into clusters.
- Stacked Bar Chart  Displays data in either vertical or horizontal bars; each bar can be subdivided into categories.
- Pie Chart  Typically used to show percentages of a whole.
- Line Chart  Typically used to show changes in data over time.
- Bubble Chart  Typically used to plot points on two axes such as "value" vs. "risk." Bubble size and color indicate additional dimensions of information.

Cancel Back Next

3. Select the type of portlet to create.

Portlet Type	Description
List	Data is presented in tabular form using rows and columns.
Bar Chart	Data is displayed as vertical or horizontal bars. Each bar represents a single item.
Clustered Bar Chart	Data is displayed as vertical or horizontal bars. Bars can be grouped into categories.

Portlet Type	Description
Stacked Bar Chart	Data is displayed as vertical or horizontal bars. Each bar can be subdivided into categories.
Pie Chart	Data is displayed as a percentage of a whole.
Line Chart	Data is displayed to show changes over time.
Bubble Chart	Four dimensions of data are displayed on an x-y axis. The x-y axis location pinpoints a spot while the size and color of the bubble indicates additional dimensions of the information.

4. Click **Next** (found near the bottom of the page).

The Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page appears.

5. Provide the portlet details using the information from the following table.

Field Name (*Required)	Description
<b>Portlet Information section</b>	
*Name	Specify a unique name for the portlet. Type any alphanumeric string (up to 80 characters in length).
Category	Select one or more categories. Choices are limited to those categories available on your PPM Center instance.

Field Name (*Required)	Description
Manage Categories	Click to add or delete portlet categories. See <a href="#">Managing Portlet Categories</a> on page 97 for details.
Description	Specify the portlet definition. Type any alphanumeric string (up to 1,800 characters in length).
Default Width	Select the default width of the portlet. Choices include: <ul style="list-style-type: none"> <li>• Narrow</li> <li>• Wide</li> </ul> Note that the default width can be changed when the portlet is personalized.
Enabled	Indicate whether or not the portlet can be added to the Dashboard page. If a portlet is added to a PPM Dashboard, then disabled, the portlet remains on the Dashboard page.
<b>Data Source section</b>	
*Data Source	Select the data source for the current portlet. The portlet data source defines the columns or chart entity, and preferences fields for a portlet definition.
New Data Source	Click to open the PPM Workbench and create a new portlet data source.

6. Click **Next**.

The Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page appears.

**Create Portlet Definition (List)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Display Columns**

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

**Add Column** **Edit** **Delete**

Click on a column to select  User Sortable

---

**Columns Displayed by Default:**

▲ Tasks ▲ OPEN\_TASKS ▼

---

**Columns Displayed by Default in Maximized View Only:**

▲ ▼

---

**Columns Available for Display:**

**Arrange Data**

Default Sort By:  ▼  Ascending  Descending

\*Default Rows Displayed:  In Normal View  
 In Maximized View

---

**Cancel** **Back** **Next**

7. Provide the appropriate information on the Create Portlet Definition (<Portlet Type>) page.

The information needed to create the different portlet types vary significantly. Field descriptions are provided in the *Supplemental Details for the Set Up Display Option Step on page 99* section.

- For list portlets, see *List Portlet on page 99*.
- For bar charts, see *Bar Chart Portlet on page 106*.
- For clustered bar charts, see *Clustered Bar Chart Portlet on page 109*.
- For stacked bar charts, see *Stacked Bar Chart Portlet on page 112*.
- For pie charts, see *Pie Chart Portlet on page 114*.

- For line charts, see *Line Chart Portlet* on page 116.
- For bubble charts, see *Bubble Chart Portlet* on page 118.

8. Click **Next**.

The Define Preferences step of the Create Portlet Definition (<Portlet Type>) page appears.

Initially, all preference fields are mapped from the portlet data source, which indicates the name of the field, type of the field (such as auto-complete or text field), and any default value. Note that preferences requiring default values are shown with a red asterisk.

- (Optional) To change the width of preferences, click the **Sizing** icon ()
- (Optional) To rearrange preferences:
  - Select a preference.
  - Drag and drop the preference into the desired location.

c. (Optional) To edit preferences:

- i. Select a preference.
- ii. Click **Edit**.

The Edit Portlet Preference: *<Preference>* dialog box opens.

hp Close Window X

Edit Portlet Preference: TASK\_STATE\_ID

Field Prompt: Limit by Task State:

Component Type: Multi-Select Auto Complete

Display:

- Editable - Allow user to edit
- Required and Editable - Require user to enter a value
- Non-Editable - Only allow user to view
- Hidden - Not visible to user

Default Value: [ ] [icon]

Done Cancel

Close Window X

- iii. Provide the preference details using the information from the following table.

Field Name (*Required)	Description
*Field Prompt	Specify the prompt that will appear on the Portlet Preference page. Type any alphanumeric string (up to 200 characters in length).
Display	Select the manner in which this preference is displayed. Choices could include one or more of the following (depending on the component type): <ul style="list-style-type: none"> <li>• <b>Editable.</b> Allows the user to edit the field.</li> <li>• <b>Required and Editable.</b> Requires the user to enter a value.</li> <li>• <b>Non-Editable.</b> Allows user to view, but not edit the field.</li> <li>• <b>Hidden.</b> The information is not viewable (or editable) by the user.</li> </ul> This field is required if a default value is required by the portlet data source.
Default Value	Specify the default value that is shown when editing the portlet. This field is required if a default value is required by the portlet data source.

- iv. Click **Done**.

The changes to preference are saved and the Edit Portlet Preference: <Preference> dialog box closes.

- d. (Optional) Select **Show Preferences summary on this portlet (user can choose to hide it)** if you want the user to have this capability.
- e. (Optional) Select **Require user to edit preferences before viewing portlet for the first time** if you want to force the user to edit their preferences.

9. If you do not want to change any of the remaining default values, click **Finish**. Otherwise, click **Next**.

The Configure Portlet Communication step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Portlet Communication Subscribers**

Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.

Enable portlet communication (user can choose to disable it)

\*Event topic:  [Manage event topics](#)

---

Cancel ◀ Back Next ▶ Preview Finish

- a. (Optional) Select **Enable portlet communication (user can choose to disable it)** if you want the user to have this capability.
- b. If portlet communication is enabled, you must enter an event topic. Use the auto-complete button to enter an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

10. If you do not want to change any of the remaining default values, click **Finish**. Otherwise, click **Next**.

The Configure Access step of the Create Portlet Definition (<Portlet Type>) page appears.

**Create Portlet Definition (List)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. **Configure Access** ▶ 7. Add User Help

---

**Configure Access**

User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

Security Type	Name
All Users	

Give Access to: User

---

**Administrator Access**

Users specified below will have access to modify this Portlet Definition.

Security Type	Name
All Portlet Definition Administrators	

Give Access to: User

---

**WSRP Access**

Make Portlet available to WSRP Consumers

---

**Drilldown Access**

This portlet supports drilling into

---

Cancel ◀ Back Next ▶ Preview Finish

a. (Optional) In the **User Access** section:

- i. Select one or more access grants (privileges) a user must have in order to add the portlet to a Dashboard page.
- ii. Select one or more users or security groups allowed to add the portlet to a Dashboard page.

By default, access is given to all users belonging to the PPM User security group.



Whenever there is no specific (individual or group) user access, this setting reverts to its default.

b. (Optional) In the **Administrator Access** section:

- Select one or more users or security groups allowed to modify the portlet.

By default, access is given to all users belonging to the PPM User Admin security group.



Whenever there is no specific (individual or group) administrator access, this setting reverts to its default.

c. (Optional) In the **WSRP Access** section:

- Select if you want to make the portlet available to WSRP consumers.
- Click **Preview** to review the layout and make sure that you have presented the information as desired.

d. (Optional) In the Drilldown Access section:

- Select if you want the portlet to support drill-down access.

11. Click **Next**.

The changes are added to the new portlet definition and the Add User Help step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

**Portlet Help**

Help content will be available to end users when viewing this portlet on their dashboard, and when adding portlets during Dashboard Personalization.

**Portlet Help Text:**

Preview Help

Cancel Back Next Preview Finish

12. In the **Portlet Help Text** field, type the help text.

This field supports HTML. Use valid HTML tagging when typing the information that defines the functionality of the portlet and lists and describes all of the portlet fields.

Click **Preview Help** to review the help content make sure that you have presented the information as desired.



Click **Preview** to review the layout and make sure that you have presented the information as desired.

13. Click **Finish**.

The help data is saved, the portlet definition is created, and a status message displayed.

Create Portlet Definition

Sample has been successfully created.

[Configure Sample](#)  
[Create another Portlet Definition](#)  
[Search for other Portlet Definitions to configure](#)

14. Review the information to make determine if your portlet definition was successfully created.

## Copying Portlet Definitions

You can copy a portlet definition to use as the basis for another portlet definition.



Java portlet definitions and WSRP portlet definitions cannot be copied.

To copy a portlet definition:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portlet Definitions > Configure Portlet Definitions**.

The Configure Portlet Definitions page appears, as shown in [step 2 on page 50](#).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see [Searching for Existing Portlet Definitions on page 50](#).

The Configure Portlet Definition: *<Portlet Definition>* page appears.

4. Click **Copy**.

The Configure Portlet Definition: *<Portlet Definition>* page is updated with the copied information.

5. Provide the portlet information using the information available from the following steps: Enter Portlet Information ([step 4 on page 54](#)), Set up Display Options ([step 6 on page 56](#)), Define Preferences ([step 8 on page 57](#)), Configure Portlet Communication ([step 9 on page 60](#)), Configure Access ([step 10 on page 61](#)), and Add User Help ([step 11 on page 63](#)).



Click **Preview** to review the layout and make sure that you have presented the information as desired.

6. Click **Create**.
7. (Optional) Make any additional modifications and click **Save**.
8. Click **Done** to return to the Configure Portlets Definitions window.

## Modifying Portlet Definitions

To change an existing portlet definition:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portlet Definitions > Configure Portlet Definitions**.

The Configure Portlet Definitions page appears, as shown in [step 2 on page 50](#).

### 3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see *Searching for Existing Portlet Definitions* on page 50.

The Configure Portlet Definition: *<Portlet Definition>* page appears.

**Configure Portlet Definition: Time Sheet Totals for Direct Reports**

This is a built-in Portlet Definition. It cannot be deleted. Preview Save Done Cancel

---

**Portlet Type:** List **Data Source:** [Time Sheet Totals for Direct Reports](#)

**Created By:** seed\_data seed\_data **Last Modified By:** seed\_data seed\_data **Last Modification Date:** 2/20/2008

**Name:** Time Sheet Totals for Direct Reports

**Category:** Time Management

**Description:** Shows the total time entered by all the direct reports for a specific manager or set of managers

**Default Width:** Narrow

**Enabled:**  Yes  No In use by 1 user(s), 0 module(s), and 0 hyperlink(s). View Usage Copy

---

Display Preference Fields Portlet Communication Access User Help

**Display Columns**

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

User Sortable

---

**Columns Displayed by Default:**

Name	RESOURCE_FULL_NAME	Tooltip: RESOURCE_INFO
Period Type	PERIOD_TYPE_NAME	Tooltip: PERIOD_TYPE_NAME
Current Period (hrs)	ACTUALS_CURRENT	
Unsubmitted Time (hrs)	UNRELEASED_TIME	
Previous Period (hrs)	ACTUALS_PREVIOUS	

---

**Columns Displayed by Default in Maximized View Only:**

---

**Columns Available for Display:**

**Arrange Data**

**Default Sort By:**  Ascending  Descending

**\*Default Rows Displayed:** 5 In Normal View  
50 In Maximized View

---

Preview Save Done Cancel

4. For non-Java portlets:
  - a. (Optional) At any time, you can click **Save** to commit your changes.
  - b. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 54](#).
  - c. (Optional) Click the link associated with **Data Source** to view the details of the data source in the PPM Workbench.
  - d. (Optional) Click the appropriate tab to make changes to the other settings. The content of the tabs varies based on the portlet type. Field descriptions are provided in [Chapter 3, \*Creating New Portlet Definitions\*, on page 53](#).

For Display tab content, refer to the following sections based on the portlet type:

- For list portlets, see [List Portlet on page 99](#).
- For bar charts, see [Bar Chart Portlet on page 106](#).
- For clustered bar charts, see [Clustered Bar Chart Portlet on page 109](#).
- For stacked bar charts, see [Stacked Bar Chart Portlet on page 112](#).
- For pie charts, see [Pie Chart Portlet on page 114](#).
- For line charts, see [Line Chart Portlet on page 116](#).
- For bubble charts, see [Bubble Chart Portlet on page 118](#).

5. For Java portlets:
  - a. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 54](#).
  - b. (Optional) Configure portlet communication subscribers using the details provided in [step 9 on page 60](#).

- c. (Optional) Configure the user and administrator access using the details provided in [step 10 on page 61](#).

6. Click **Done**.



Click **Preview** to review the layout and make sure that you have presented the information as desired.

## Deleting Portlet Definitions

To delete a portlet definition:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portlet Definitions > Configure Portlet Definitions**.

The Configure Portlet Definitions page appears, as shown in [step 2 on page 50](#).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see [Searching for Existing Portlet Definitions on page 50](#).

The Configure Portlet Definition: *<Portlet Definition>* page appears.

4. Click the delete icon next to the name of the portlet definition to delete.

A confirmation dialog box opens.

5. Click **Delete**.

The confirmation dialog box closes and the Configure Portlet Definitions page is updated.

# Importing Java Portlet Definitions

The WAR files used for Java portlet definitions must be placed on the server file system in the `<PPM_Home>/server/<PPM_Server_Name>/deploy` directory.

To import a Java portlet definition using the Import Portlet Definition wizard:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Portlet Definitions > Import a Portlet Definition**.

The Choose Portlet Type step of the Import Portlet Definition page appears.

The screenshot shows the 'Import Portlet Definition' wizard interface. At the top, the title is 'Import Portlet Definition'. Below the title, there are five steps in a progress bar: 1. Choose Portlet Type (highlighted), 2. Select from Available Portlets, 3. Enter Portlet Information, 4. Configure Portlet Communication, and 5. Configure Access. Below the progress bar, there are two radio button options: 'Java Portlet - Created according to the Java Portlet specification' (which is selected) and 'WSRP Portlet - Created according to WSRP specifications'. At the bottom of the form, there are three buttons: 'Cancel', 'Back', and 'Next'.

3. Select **Java Portlet - Created according to the Java Portlet specification**.

#### 4. Click **Next**.

The Select from Available Portlets step of the Import Portlet Definition page appears.

**Import Portlet Definition (Java)**

1. Choose Portlet Type ▶ 2. **Select from Available Portlets** ▶ 3. Enter Portlet Information  
4. Configure Portlet Communication ▶ 5. Configure Access

---

**Select from Available Portlets**

The Dashboard has found the Java portlets listed below. Please select one of these portlets to import.

Portlet Display Name	Description
<input checked="" type="checkbox"/> Project List	Displays general information about ITG Projects, such as how close they are to completion and their scheduled finish date.
<input checked="" type="checkbox"/> Summary Task List	Displays general information about Summary Tasks, such as how close they are to completion and their scheduled finish date.
<input checked="" type="checkbox"/> Package List	Displays general information about ITG Packages, such as their description and status.
<input checked="" type="checkbox"/> Request Activity	Displays general activity information about ITGRequests, such as the number of Requests opened and closed during the last two weeks, and the number of open Requests.
<input checked="" type="checkbox"/> Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Provides drill down to any Object Type or Environment to view the included Packages.
<input checked="" type="checkbox"/> Request Summary	Displays information about groups of ITGRequests, such as their priority, type, status and the total number of Requests for each category. Additionally provides drill down capabilities to detailed requests.
<input checked="" type="checkbox"/> Open Requests by Priority	A bar chart that displays the number of Requests currently open, grouped by priority.
<input checked="" type="checkbox"/> Request List	Displays general information about ITG Requests, such as their description and status.
<input checked="" type="checkbox"/> Project Gantt	Displays Projects, Tasks and Milestones in Gantt chart format. This portlet can be configured based on such criteria as Project and Task status, schedule and resource assignments. It also allows drilling down into Project and Task details.
<input checked="" type="checkbox"/> Capitalized Project Timelines	A graphical display of projects with capitalized costs showing their start date, end date and health.
<input checked="" type="checkbox"/> Project Timelines	Displays project level information in a gantt format for multiple projects, based on the planned start and finish periods.
<input type="radio"/> RSS Portlet	RSS Reader Portlet
<input type="radio"/> URL Portlet	URL Portlet
<input checked="" type="checkbox"/> Previously imported	

Cancel ◀ Back Next ▶ Finish

#### 5. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definitions are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.

6. Click **Next**.

The Enter Portlet Information step of the Import Portlet Definition page appears.

The screenshot shows the 'Import Portlet Definition (Java)' page with the progress bar indicating Step 3: Enter Portlet Information. The 'Portlet Information' section contains the following fields:

- Name:** URL Portlet
- Category:** (empty) with a 'Manage Categories' button
- Description:** URL Portlet
- Default Width:** Narrow
- Enabled:** Yes (selected) / No

Navigation buttons at the bottom include Cancel, Back, Next, and Finish.

7. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 54](#).

8. Click **Next**.

The Configure Portlet Communication step of the Import Portlet Definition page appears.

The screenshot shows the 'Import Portlet Definition (Java)' page with the progress bar indicating Step 4: Configure Portlet Communication. The 'Portlet Communication Subscribers' section contains the following information:

- Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.
- Enable portlet communication (user can choose to disable it)
- \*Event topic:** (empty) with a 'Manage event topics' button

Navigation buttons at the bottom include Cancel, Back, Next, and Finish.

- If portlet communication is enabled, you must enter an event topic. Use the auto-complete button to enter an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

9. Click **Next**.

The Configure Access step of the Import Portlet Definition page appears.

Import Portlet Definition (Java)

1. Choose Portlet Type ▶ 2. Select from Available Portlets ▶ 3. Enter Portlet Information  
4. Configure Portlet Communication ▶ 5. Configure Access

---

**Configure Access**

User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

Security Type	Name
All Users	

Give Access to: User

---

Administrator Access

Users specified below will have access to modify this Portlet Definition.

Security Type	Name
All Portlet Definition Administrators	

Give Access to: User

---

WSRP Access

Make Portlet available to WSRP Consumers

Cancel Back Next Finish

- (Optional) Configure the user and administrator access using the details provided in [step 10 on page 61](#).

10. Click **Finish**.

The confirmation page appears.

Import Portlet Definition

Package List (Copy) has been successfully imported.

[Configure Package List \(Copy\)](#)  
[Import another Portlet Definition](#)  
[Create new Portlet Definition](#)  
[Search for other Portlet Definitions to configure](#)

11. Review the Import Portlet Definition page and verify that the import was successful.

12. (Optional) Select the link of your choice.

# Importing WSRP Portlet Definitions

To import a WSRP portlet definition using the Import Portlet Definition wizard:

1. Make sure that the producer Web URL is available.
2. Log on to PPM Center.
3. From the menu bar, select **Administration > Portlet Definitions > Import a Portlet Definition**.

The Choose Portlet Type step of the Import Portlet Definition page appears.

The screenshot shows the 'Import Portlet Definition' wizard. At the top, the title is 'Import Portlet Definition'. Below the title is a progress bar with five steps: 1. Choose Portlet Type (selected), 2. Select from Available Portlets, 3. Enter Portlet Information, 4. Configure Portlet Communication, and 5. Configure Access. Below the progress bar are two radio button options: 'Java Portlet - Created according to the Java Portlet specification' (unselected) and 'WSRP Portlet - Created according to WSRP specifications' (selected). At the bottom of the form are three buttons: 'Cancel', 'Back', and 'Next'.

4. Select **WSRP Portlet - Created according to WSRP specifications**.
5. Click **Next**.

The Define Producer Web Service step of the Import Portlet definition page appears.

The screenshot shows the 'Import Portlet Definition (WSRP)' wizard. At the top, the title is 'Import Portlet Definition (WSRP)'. Below the title is a progress bar with six steps: 1. Choose Portlet Type, 2. Define Producer Web Service (selected), 3. Select from Available Portlets, 4. Enter Portlet Information, 5. Configure Portlet Communication, and 6. Configure Access. Below the progress bar is a section titled 'Define Producer Web Service'. The text in this section reads: 'In this step you can either: select a predefined producer (new producers can be defined using the Manage WSRP Producer button) or type a free URL of a WSRP producer. When you click Next, the Dashboard will contact the web service to determine what portlets are available. You will then be able to choose one of the portlets that it offers.' Below this text are two radio button options: 'Predefined Producer URL' (selected) and 'Producer URL' (unselected). The 'Predefined Producer URL' option has a text input field and a 'Manage WSRP Producers' button. The 'Producer URL' option has a text input field. Below the input fields is an example URL: 'Example: http://www.myserver.com/dashboard/wsrp4producer.wsdl'. At the bottom of the form are three buttons: 'Cancel', 'Back', and 'Next'.

6. Select either a **Predefined Producer URL** (define new producers by clicking the **Manage WSRP Producers** button) or **Producer URL** (enter the URL for the Web service providing portlet definitions using WSRP).
7. Click **Next**.

The Web service is contacted to determine what portlet definitions are available.

The Select from Available Portlets page appears.

**Import Portlet Definition (WSRP)**

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. **Select from Available Portlets** ▶ 4. Enter Portlet Information  
5. Configure Portlet Communication ▶ 6. Configure Access

---

**Select from Available Portlets**

The Dashboard has found the portlets listed below from the WSRP producer at http://labmvtg25.46300/dashboard/wsrp4/producer.wSDL. Please select one of these portlets to import.

Portlet Display Name	Description
<input checked="" type="radio"/> My Requests	Displays all Requests created by or assigned to the current user. This portlet provides a critical view into your most pressing Requests and nearing deadlines.
<input type="radio"/> My Tasks	Displays all Project Tasks currently assigned to you that have a scheduled finish date two weeks from the current date.
<input type="radio"/> Project List	Displays general information about PPM Projects, such as how close they are to completion and their scheduled finish date.

Cancel ◀ Back Next ▶ Finish

8. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definition are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.

9. Click **Next**.

The Enter Portlet Information step of the Import Portlet Definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type > 2. Define Producer Web Service > 3. Select from Available Portlets > 4. Enter Portlet Information > 5. Configure Portlet Communication > 6. Configure Access

Portlet Information

\*Name: Project List

Category: [dropdown] Manage Categories

Description: Displays general information about PPM Projects, such as how close they are to completion and their schedule

Default Width: Narrow [dropdown]

Enabled:  Yes  No

Cancel Back Next Finish

10. Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 54](#).

11. Click **Next**.

The Configure Portlet Communication step of the Import Portlet Definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type > 2. Define Producer Web Service > 3. Select from Available Portlets > 4. Enter Portlet Information > 5. Configure Portlet Communication > 6. Configure Access

Portlet Communication Subscribers

Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.

Enable portlet communication (user can choose to disable it)

\*Event topic: [dropdown] Manage event topics

Cancel Back Next Finish

- If portlet communication is enabled, you must enter an event topic.

Use the auto-complete button to enter an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

12. Click **Next**.

The Configure Access step of the Import Portlet Definition page appears.

**Import Portlet Definition (WSRP)**

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information  
5. Configure Portlet Communication ▶ 6. **Configure Access**

---

**Configure Access**

User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

Security Type	Name
All Users	

Give Access to: User

---

Administrator Access

Users specified below will have access to modify this Portlet Definition.

Security Type	Name
All Portlet Definition Administrators	

Give Access to: User

---

Drilldown Access

This portlet supports drilling into

Cancel Back Next Finish

13. (Optional) Configure the user and administrator access using the details provided in [step 10 on page 61](#).

14. Click **Finish**.

The confirmation page appears.

15. Review the Import Portlet Definition page and verify that the import was successful.

16. (Optional) Select the link of your choice.

# Migrating Portlet Definitions

Use the PPM Portlet Definition Migrator object type to migrate portlet definitions. The following are things to consider when migrating portlet definitions:

- When migrating an HP-supplied portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a standard portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a Java portlet definition, you must configure the source and destination servers with the same set of Web applications (such as WARs) before migrating the Java portlet definition.
- When migrating a WSRP portlet definition, the migration of the portlet definition is sufficient for the WSRP portlet to work. Migrating a WSRP portlet definition might fail under the following conditions:
  - **If the URL uses a port number.** If you move that portlet to a different machine whose WSRP provider runs on a different port number, the portlet stops working.
  - **If a WSRP portlet definition shares a firewall or a private network with a WSRP producer.** You cannot migrate the portlet definition outside of that private network or firewall protected area (because the machine is not accessible).

# Defining a Drill-down Page

Portlet drill-down is a powerful feature that allows you to access and view the details of the information displayed in a portlet.

When you create a portlet, you can specify one or more drill-to portlets (these are sometimes called drill-down pages). Clicking a portlet that contains a drill-to portlet results in the display of the corresponding portlet. A drill-to portlet typically offers a view of the data with more details or the information is filtered differently.

- Prior to being added to a portlet, these drill-to portlets must already exist on your PPM Center instance.
- Drill-to portlets must be list portlets created using the portlet builder wizard.
- Only selected HP-supplied portlets can be used as drill-to portlets. These include: Issue List, Program Risk List, Program Scope Change List, and Program Project List.



## Usage Example

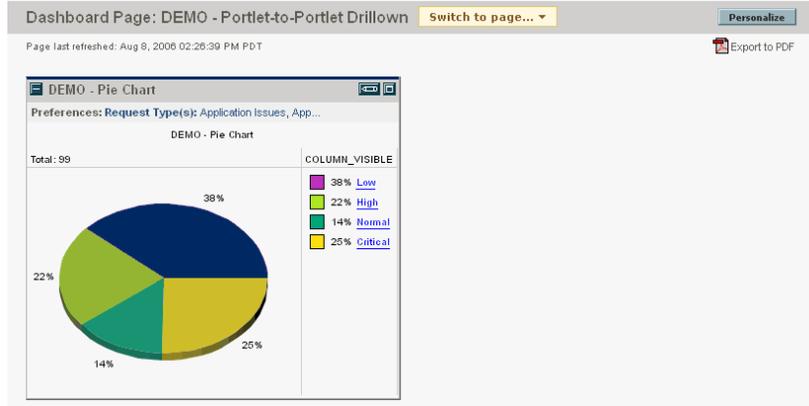
In some cases you may want to view the data in more than one way. Whenever you want to do this, specify one or more drill-to portlets.

For example, suppose you have a portlet that shows a collection of requests. However, you would like to be able to view the breakdown of requests sorted by priority and have insight into some of the requests' details. To provide this information, you would create two drill-to portlets, one showing the requests sorted by priority and the other showing the selected details of the requests. Then you would configure your portlet such that it is linked to these drilldown pages (drill-to portlets).

When you click key areas within the portlet having the drilldown pages, the appropriate data from the drill-to portlets is displayed.

The following figure shows an example of this kind of scenario.

Figure 3-1. Portlet having drilldown pages



If you click either the amber (25%) wedge or the **Critical** link, the drill-to pages having requests with critical priorities are shown (see *Figure 3-2*). Note that the drill-to page on the left shows the list of requests having the selected priority, whereas the drill-to page on the right shows the selected details of the request.

Figure 3-2. Drill-to portlets showing critical priority requests

Drill Down From DEMO - Pie Chart [Back](#) [Export to PDF](#)

Priority	Request #	Request #	Request Type	Description	Priority
Critical	30667	30667	Application Issues	Getting stock from front.	Critical
Critical	30649	30649	Application Issues	External Website - Job updates.	Critical
Critical	30641	30641	Application Issues	Replace cartridge in Brother labeler.	Critical
Critical	30622	30622	Application Issues	Tom called about his printer.	Critical
Critical	30612	30612	Application Issues	Research massive port scan/probe on cti.com	Critical

Showing 1 to 5 of 25 [Prev](#) [Next](#)

Alternatively, if you click either the red (38%) wedge or the **Low** link, the drill-to pages having requests with low priorities appear (see *Figure 3-3*).

Figure 3-3. Drill-to portlets showing low priority requests

Drill Down From DEMO - Pie Chart Export to PDF

Priority	Request #	Request #	Request Type	Description	Priority
Low	30672	30672	Application Issues	Make space on full volume on Pearl	Low
Low	30654	30654	Application Issues	Corporate Affiliate	Low
Low	30644	30644	Application Issues	Morning mail and phone support.	Low
Low	30636	30636	Application Issues	Move briefing.	Low
Low	30617	30617	Application Issues	Morning mail / phone msg support.	Low

Showing 1 to 5 of 38 [Prev](#) [Next](#)

## Defining a Drill-down Page

The following procedure describes how to define a drilldown page. These instructions are applicable to the third step of the portlet builder wizard.



The page from which the drill-to portlets are accessed is sometimes referred to as the drill-from page.

To define a drill-down page for a column:

1. On the Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page, select **Drilldown to Portlet**.

**Create Portlet Definition (Pie Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

No Hyperlink

Hyperlink Source:

Drilldown to Portlet: (None) [Edit](#)

Portlet Event:

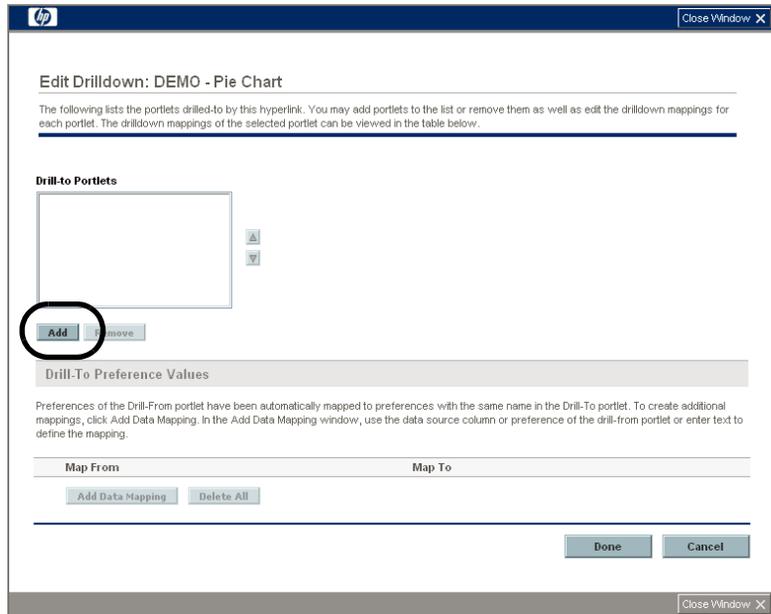
**Sample Pie Chart**

Chart Title	Wedge Label
Total: N (Wedge Source Value Total)	20% <i>Wedge A</i>
	25% <i>Wedge B</i>
	45% <i>Wedge C</i>
	8% <i>Wedge D</i>
	2% <i>Wedge E</i>

Cancel [Back](#) [Next](#)

2. Click **Edit**.

The Edit Drilldown: <Name> dialog box appears.



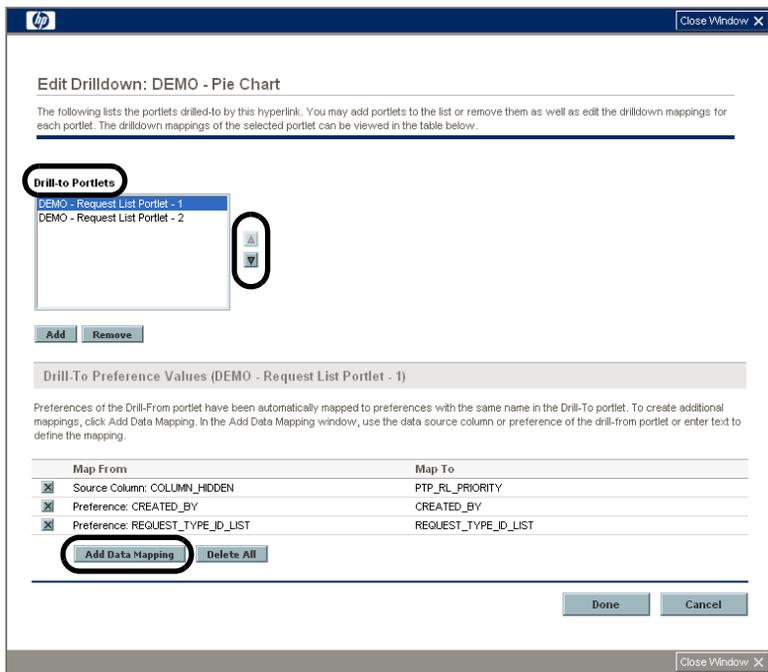
3. Click **Add**.

The list of available portlet definitions appears.

4. Select one or more portlet definitions from the list presented.

5. Click **OK**.

The portlet definition are added to the **Drill-to Portlets** list and the list of available portlet definitions disappears.



Use the up- and down-pointers to rearrange the order of the drill-to portlets. When displayed, the drill-to portlets appear in the order your selected, in a top to bottom fashion. Narrow portlets will not be displayed side by side.

6. (Optional) To change the default mapping between the current portlet definition and the drill-to portlet definition:
  - a. Select a portlet definition from the **Drill-to Portlets** list.
  - b. Click **Add Data Mapping**.

The Add Data Mapping dialog box appears.

- c. Provide the mapping details using the information from the following table.



The examples shown in [Usage Samples on page 84](#) include annotations that identify the data mappings used in the example.

Field Name (*Required)	Description
*Map Value From	<p>Indicate the data to use. Choices include:</p> <ul style="list-style-type: none"> <li>• <b>Data Source Column.</b> Select a column. Choices are limited to the columns available in your data source.</li> <li>• <b>Preference of Drill-From Portlet.</b> Select the desired preference for the portlet.</li> <li>• <b>Text.</b> Enter an alphanumeric string up to 200 characters in length.</li> </ul>
*Map Value To	<p>Select the desired preference from the drill-to portlet. Choices are limited to the preference fields in the drill-to portlet.</p>

d. Click **Add**.

The information is added to the Edit Drilldown: <Name> dialog box and the Add Data Mapping dialog box disappears.

7. (Optional) To delete a mapping between the current portlet definition and the drill-to portlet definition:

- a. Select a portlet definition from the **Drill-to Portlets** list.
- b. In the **Drill-To Preference Values (<Drill-to Portlet>)** section, select from the following techniques:
  - Click the **Delete** icon next to the unwanted mapping
  - Click **Delete All** to remove all the mappings at one time



Occasionally it is easier to delete the existing mappings, then remap the current portlet and drill-to portlet definitions.

8. Once the drilldown is correctly defined, click **Done**.

The Edit Drilldown: <Name> dialog box disappears.

Continue with the configuration (and sharing) of your portlet as you normally would.

## Usage Samples

The following images provide details about the data source and portlet configuration used to create the portlets used in the examples shown in this document.



The annotations identify each of the three data mappings.

## DEMO - Pie Chart Portlet

This is the drill-from portlet and its various components.

**Create Portlet Definition (Pie Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

No Hyperlink

Hyperlink Source:

Drilldown to Portlet: (None)

Portlet Event:

Sample Pie Chart

Chart Title	Wedge Label
Total: N (Wedge Source Value Total)	20% <a href="#">Wedge A</a>
	25% <a href="#">Wedge B</a>
	45% <a href="#">Wedge C</a>
	8% <a href="#">Wedge D</a>
	2% <a href="#">Wedge E</a>

## Data Source

**Data Source : DEMO - Pie Chart**

Data Source Name: DEMO - Pie Chart Time-out: Use Default 20 Seconds

Description:

Enabled:  Yes  No

Full Query for the Data Source

```
SELECT PRIORITY_MEANING COLUMN_VISIBLE PRIORITY_CODE COLUMN_HIDDEN COUNT(*) VALUE,
length(priority_code) || ':' || length(priority_meaning) || ':' || priority_code || ':' || priority_meaning VALUE_HYPERLINK,
length(priority_code) || ':' || length(priority_meaning) || ':' || priority_code || ':' || priority_meaning
COLUMN_CODESTRING
FROM KCRT_REQUESTS_V
WHERE 1=1
AND batch_number = 1
group by priority_code, priority_meaning
```

Use Bind Variables?  
 Yes  No

Verify OK Save Cancel

Ready

**Data Source : DEMO - Pie Chart**

Data Source Name: DEMO - Pie Chart Time-out: Use Default 20 Seconds

Description:

Enabled:  Yes  No

Seq	Name	Table	Validation	Required	Enabled
1	Created By:	CREATED_BY	KNTA - User Names - Enabled	N	Y
2	Request Type(s)	REQUEST_TYPE_ID_L	KCRT - Request Types - Enabled	N	Y

Verify OK Save Cancel

Ready

# Portlet Definition

## Configure Portlet Definition: DEMO - Pie Chart

Preview Save Done Cancel

Portlet Type: Pie Chart Data Source: My Packages

Created By: Admin User Last Modified By: Admin User Last Modification Date: 2/22/2008

Name: DEMO - Pie Chart

Category:  Manage Categories

Description:

Default Width: Narrow

Enabled:  Yes  No Not in use.

Copy Delete

Display Preference Fields Portlet Communication Access User Help

### Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source: ASSIGNED\_TO

\*Wedge Size Source: ASSIGNED\_TO

Wedge Label: ASSIGNED\_TO

Color Source:

Tooltip Source:

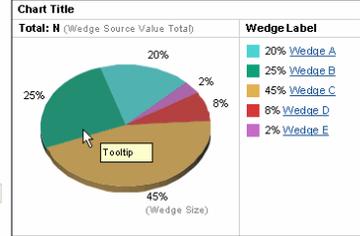
Hyperlink Options:  No Hyperlink

Hyperlink Source: ASSIGNED\_TO

Drilldown to Portlet: Resource Assignments Edit

Portlet Event: Edit

### Sample Pie Chart



Preview Save Done Cancel

hp Close Window X

### Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

---

**Drill-to Portlets**

DEMO - Request List Portlet - 1  
 DEMO - Request List Portlet - 2

▲  
▼

**Add** **Remove**

---

**Drill-To Preference Values (DEMO - Request List Portlet - 1)**

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

Map From	Map To
<input checked="" type="checkbox"/> Source Column: COLUMN_HIDDEN	PTP_RL_PRIORITY
<input checked="" type="checkbox"/> Preference: CREATED_BY	CREATED_BY
<input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST	REQUEST_TYPE_ID_LIST

1   
 2   
 3

**Add Data Mapping** **Delete All**

---

**Done** **Cancel**

Close Window X

hp Close Window X

### Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

---

**Drill-to Portlets**

DEMO - Request List Portlet - 1  
 DEMO - Request List Portlet - 2

▲  
▼

**Add** **Remove**

---

**Drill-To Preference Values (DEMO - Request List Portlet - 2)**

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

Map From	Map To
<input checked="" type="checkbox"/> Source Column: COLUMN_HIDDEN	PTP_RL_PRIORITY
<input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST	REQUEST_TYPE_ID_LIST
<input checked="" type="checkbox"/> Preference: CREATED_BY	CREATED_BY

1   
 3   
 2

**Add Data Mapping** **Delete All**

---

**Done** **Cancel**

Close Window X

## DEMO - Request List Portlet - 1

This is one of the drill-to portlets and its various components.

Preferences:			
Request # Δ	Request Type	Description	Priority
30145	Enhancement Request	Update New Employee Health Care Assignment	Low
30167	Telco Generic	are there required fields?	Low
30210	Gap	Software doesn't support multi-currency	High
30301	System Change Request	New Period Close Reporting for Finance	Normal
30303	System Change Request	Need daily MRP run to start at 23:00 instead of 22:00 to accomodate for longer run times.	Low

Showing 1 to 5 of 200 [Prev](#) [Next](#) [Maximize](#)

## Data Source

The screenshot shows a configuration window titled "Data Source : DEMO - Request List Portlet - 1". The "Data Source Name" is "DEMO - Request List Portlet - 1" and the "Time-out" is set to "20" seconds. The "Enabled" checkbox is checked. The "Full Query for the Data Source" is:

```
SELECT PRIORITY_MEANING MY_PRIORITY, request_id MY_REQUEST_NO
FROM KCRT_REQUESTS_V
WHERE 1=1
AND batch_number = 1
```

At the bottom, there are buttons for "Edit Query", "Verify", "OK", "Save", and "Cancel". The status bar at the bottom left says "Ready".

**Data Source : DEMO - Request List Portlet - 1**

Data Source Name: DEMO - Request List Portlet - 1 Time-out: Use Default 20 Seconds

Description:

Enabled:  Yes  No

Data Source | Filter Fields | **Portlet Definitions** | Ownership

Seq	Name	Token	Validation	Required	Enabled
1	Created By	CREATED_BY	ANTA - User Names - Enabled	N	Y
2	Request Type	REQUEST_TYPE_ID_L	ORT - Request Types - Enabled	N	Y
3	Priority	PTP_RL_PRIORITY	EM Filter - Priority - Enabled (with blank)	N	Y

↑ ↓ New Edit Remove

Verify OK Save Cancel

Ready

Configure Portlet Definition: DEMO - Request List Portlet - 1

---

**Portlet Type:** List    **Data Source:** DEMO - Request List Portlet - 1  
**Created By:**                      **Last Modified By:**                      **Last Modification Date:** Aug 3, 2006

**Name:**

**Category:**

**Description:**

**Default Width:** Wide

**Enabled:**  Yes  No    In use by 0 user(s), 0 module(s), and 1 hyperlink(s).

---

Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

Click on a column to select     User Sortable

---

**Columns Displayed by Default:**

<input type="button" value="v"/>	<input type="button" value="x"/>	Priority	<input type="button" value="v"/>	My Priority	<input type="button" value="x"/>
<input type="button" value="v"/>	<input type="button" value="x"/>	Request #	<input type="button" value="v"/>	My Request No	<input type="button" value="x"/>

---

**Columns Displayed by Default in Maximized View Only:**

---

**Columns Available for Display:**

Arrange Data

**Default Sort By:**  

 Ascending  
 Descending

**Default Rows Displayed:**  In Normal View  
 In Maximized View

## DEMO - Request List Portlet - 2

This is the other drill-to portlet and its various components.

Preferences:			
Request # Δ	Request Type	Description	Priority
30145	Enhancement Request	Update New Employee Health Care Assignment	Low
30167	Telco Generic	are there required fields?	Low
30210	Gap	Software doesn't support multi-currency	High
30301	System Change Request	New Period Close Reporting for Finance	Normal
30303	System Change Request	Need daily MRP run to start at 23:00 instead of 22:00 to accomodate for longer run times.	Low

Showing 1 to 5 of 200 [Prev](#) [Next](#) [Maximize](#)

### Data Source

**Data Source : DEMO - Request List Portlet - 2**

Data Source Name: DEMO - Request List Portlet - 2 Time-out: Use Default 20 Seconds

Description:

Enabled:  Yes  No

Data Source | Filter Fields | Portlet Definitions | Ownership

Full Query for the Data Source

```
SELECT PRIORITY_MEANING MY_PRIORITY, request_id MY_REQUEST_NO, DESCRIPTION MY_DESCRIPTION,
REQUEST_TYPE_NAME MY_REQUEST_TYPE_NAME
FROM KCRT_REQUESTS_V
WHERE 1=1
AND batch_number = 1
```

Edit Query Use Bind Variables?  Yes  No

Verify OK Save Cancel

Ready

Data Source : DEMO - Request List Portlet - 2

Data Source Name: DEMO - Request List Portlet - 2 Time-out: Use Default 20 Seconds

Description:

Enabled:  Yes  No

Data Source | Filter Fields | Portlet Definitions | Ownership

Seq	Name	Table	Validation	Required	Enabled
1	Created By	CREATED_BY	NTA - User Names - Enabled	N	Y
2	Request Type	REQUEST_TYPE_ID_L	RT - Request Types - Enabled	N	Y
3	Priority	PTP_RL_PRIORITY	DEM Filter - Priority - Enabled (with blank)	N	Y

↑ ↓ New Edit Remove

Verify OK Save Cancel

Ready

# Portlet Definition

## Configure Portlet Definition: DEMO - Request List Portlet - 2

[Preview](#) [Save](#) [Done](#) [Cancel](#)

Portlet Type: List Data Source: DEMO - Request List Portlet - 2

Created By: Last Modified By: Last Modification Date: Aug 3, 2006

Name: DEMO - Request List Portlet - 2

Category: [Manage Categories](#)

Description:

Default Width: Wide

Enabled:  Yes  No In use by 0 user(s), 0 module(s), and 1 hyperlink(s). [View Usage](#) [Copy](#) [Delete](#)

Display | Preference Fields | Access | User Help

### Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

[Add Column](#) [Edit](#) [Delete](#)

Click on a column to select  User Sortable

#### Columns Displayed by Default:

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Request #	My Request No
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Request Type	My Request Type Name
<input type="checkbox"/>	<input type="checkbox"/>	Description	My Description
<input type="checkbox"/>	<input type="checkbox"/>	Priority	My Priority

#### Columns Displayed by Default in Maximized View Only:

#### Columns Available for Display:

Arrange Data

Default Sort By: Request #  Ascending  Descending

Default Rows Displayed: 5 In Normal View  
50 In Maximized View

[Preview](#) [Save](#) [Done](#) [Cancel](#)

# Defining a Portlet Event

The following procedure describes how to define a portlet event. These instructions are applicable to the third step of the portlet builder wizard.

To define a portlet event for a column:

1. On the Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page, select **Portlet Event**.

**Create Portlet Definition (Pie Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. **Set up Display Options** ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

No Hyperlink

Hyperlink Source:

Disabled to Portlet (None)

Portlet Event:

**Sample Pie Chart**

**Chart Title**

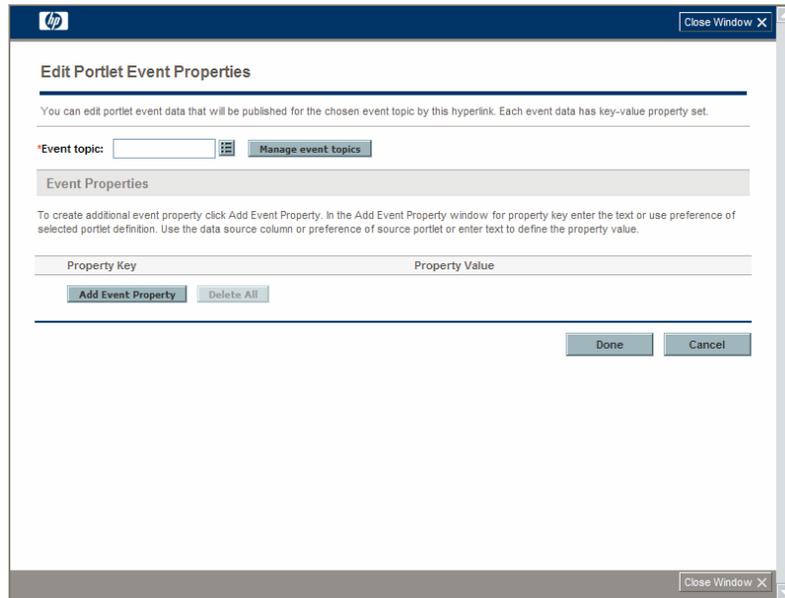
Total: N (Wedge Source Value Total)

Wedge Label
20% <a href="#">Wedge A</a>
25% <a href="#">Wedge B</a>
45% <a href="#">Wedge C</a>
8% <a href="#">Wedge D</a>
2% <a href="#">Wedge E</a>

Cancel   Back   Next

2. Click **Edit**.

The Edit Portlet Event Properties dialog box appears.



3. Enter an event topic. Use the autocomplete button to enter an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

4. Click **Add Event Property**.

The Add Event Property dialog box appears.

5. Provide the event property details using the information from the following table.

Field Name (*Required)	Description
*Property Key	<p>Select the desired preference from the portlet definition. Choices are limited to the preference fields in the portlet definition.</p> <p>Or, enter an alphanumeric string up to 200 characters in length.</p>
*Property Value	<p>Indicate the data to use.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>■ <b>Data Source Column.</b> Select a column. Choices are limited to the columns available in your data source.</li> <li>■ <b>Portlet source preference.</b> Select the desired preference for the portlet.</li> <li>■ <b>Text.</b> Enter an alphanumeric string up to 200 characters in length.</li> </ul>

6. Click **Add**.

The information is added to the Edit Portlet Event Properties dialog box and the Add Event Property dialog box disappears.

7. (Optional) To delete an event property:

- Click the **Delete** icon next to the unwanted event property.
- Click **Delete All** to remove all the event properties at one time.

8. Once the event properties are correctly defined, click **Done**.

The Edit Portlet Event Properties dialog box disappears.

Continue with the configuration (and sharing) of your portlet as you normally would.

## Managing Portlet Categories

Managing categories is an optional step when creating or maintaining portlet definitions.

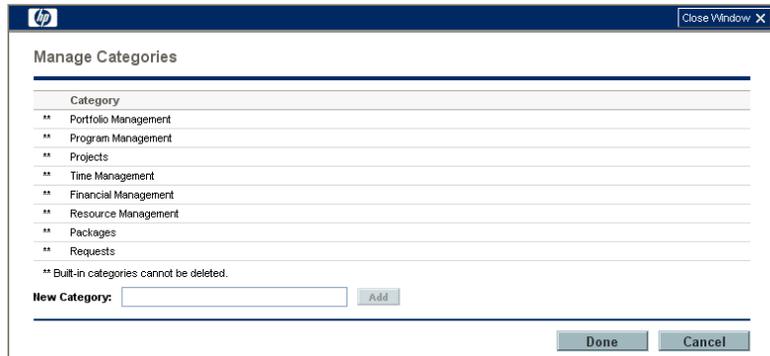
Portlet categories define an entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet can make a portlet easier to find.

### Adding Portlet Categories

To add a portlet category:

1. Click **Manage Categories**, on either the:
  - Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page
  - Configure Portlet Definition: <Portlet Definition> page

The Manage Categories dialog box appears.



2. Type a new category name in the **New Category** field.
3. Click **Add**.

The new category is added to the list.

4. Click **Done**.

The Manage Categories dialog box is closed.

## Deleting Portlet Categories

To delete a portlet category:



HP-supplied portlet categories cannot be deleted. Also, you cannot delete a portlet category containing one or more portlet definition, and any such categories do not include a **Delete** icon.

1. Click **Manage Categories**, on either the:
  - Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page
  - Configure Portlet Definition: <Portlet Definition> page

The Manage Categories dialog box appears.

2. Click the **Delete** icon next to the portlet category.

The portlet category is deleted.

3. Click **Done**.

The Manage Categories dialog box is closed.

## Supplemental Details for the Set Up Display Option Step

This section provides relevant details for the Set up Display options for the various portlet types. This information is used in [step 7 on page 56](#).

### List Portlet

Figure 3-4. Set up Display Options for list portlets

**Create Portlet Definition (List)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Display Columns**

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

**Add Column** **Edit** **Delete**

Click on a column to select  User Sortable

---

**Columns Displayed by Default:**

▲	Tasks	▲	OPEN_TASKS
---	-------	---	------------

---

**Columns Displayed by Default in Maximized View Only:**

▲	
---	--

---

**Columns Available for Display:**

---

**Arrange Data**

Default Sort By:   Ascending  Descending

\*Default Rows Displayed:  In Normal View  
 In Maximized View

**Cancel** **Back** **Next**

Table 3-1. Set up Display Options field descriptions for list portlets (page 1 of 2)

Field Name (*Required)	Description
<b>Display Columns section</b>	
Add Column	Click to add a new column. See <a href="#">Adding Columns</a> for details.
Edit	Select a column, then click to make changes to that column. See <a href="#">Editing Columns on page 105</a> for details.
Delete	Select a column, then click to remove that column. See <a href="#">Deleting Columns on page 106</a> for details.
Columns Displayed by Default	Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it. Choices include the columns whose <b>Display</b> value is set to either <b>By Default - Shown in user's initial view</b> or <b>Always - Cannot be removed by user</b> .
Columns Displayed by Default in Maximized View Only	Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it. Choices include the columns whose <b>Display</b> value is set to <b>In Maximized View Only - Shown by default in Maximized View</b> .
Columns Available for Display	Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it. Choices include the columns whose <b>Display</b> value is set to <b>Optional - Available for display by user</b> .
<b>Arrange Data section</b>	
Default Sort By	Select the default column used to sort the data. Choices include the columns whose <b>User Sortable</b> value is set to <b>Yes</b> .

Table 3-1. Set up Display Options field descriptions for list portlets (page 2 of 2)

Field Name (*Required)	Description
Ascending/Descending	Indicate whether to sort the data in <b>Ascending</b> and <b>Descending</b> order.
*Default Rows Displayed in Normal View	Specify the default number of records displayed in a normal view portlet. Type any integer greater than zero.
*Default Rows Displayed in Maximized View	Specify the default number of records displayed in a maximized portlet. Type any integer greater than zero.

## Adding Columns

To add a new column to a list portlet:

1. Click **Add Column**.

The Add Display Column dialog box opens.

2. Provide the column details using the information from the following table.



Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of the following table.

Field Name (*Required)	Description
<b>All Column Types</b>	
*Column Title	Specify the column title to be displayed in the portlet. Type any alphanumeric string (up to 200 characters in length).
*Column Type	Select the column type. Choices include: <ul style="list-style-type: none"><li>• Text</li><li>• Text with Icon</li><li>• Icon</li><li>• Progress Bar</li></ul>
Tooltip Source	Select the source for the tooltip that appears when a user's cursor hovers over an item. Choices are limited to those columns in the data source configured for this portlet definition on your PPM Center instance.
Source contains HTML	Select to enable HTML support for <b>Tooltip Source</b> .
User Sortable	Indicate whether or not the current column can be used for sorting purposes.

Field Name (*Required)	Description
Display	<p>Select how the column should be displayed. Choices include:</p> <ul style="list-style-type: none"> <li>• <b>Optional.</b> Make the column available to the user in the portlet's edit page (Available Column).</li> <li>• <b>By Default.</b> Make the column visible in the portlet (Displayed Column).</li> <li>• <b>In Maximized View Only.</b> Make the column visible in the portlet's Maximized View only (Additional Columns Displayed in Maximized View).</li> <li>• <b>Always.</b> Make the column visible in the portlet (Displayed Column with asterisk).</li> </ul>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>
<b>Column Type: Text and Text with Icon</b>	
*Visible Text Source	<p>Select the data column that contains the information to display in the portlet. Choices are limited to those columns in the data source configured for this portlet definition on your PPM Center instance.</p>
Source contains HTML	<p>Select to enables HTML support <b>Visible Text Source.</b></p>

Field Name (*Required)	Description
Column Width	Select the weight of column relative to the others. Choices include: <ul style="list-style-type: none"> <li>• Small</li> <li>• Medium</li> <li>• Large</li> </ul>
Truncate after <X> Characters	When <b>Source contains HTML</b> for <b>Visible Text Source</b> is selected, specify the number of characters to show in the column. Type any integer greater than zero.
Show Full Text in Tooltip	When a value is supplied for <b>Truncate after &lt;X&gt; Characters</b> , select to show the full text a in tooltip.
<b>Column Type: Icon or Text with Icon</b>	
*Icon Source	Select the source for the icon. Choices are limited to those columns in the data source configured for this portlet definition on your PPM Center instance or a column predefined with icon URLs.
<b>Column Type: Progress Bar</b>	
*Percentage Source	Choices are limited to those columns in the data source configured for this portlet definition on your PPM Center instance or a column predefined with percentage information.
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 120</a> for details.

### 3. Click **Done**.

The Add Display Column dialog box closes and the new column is added to the Create Portlet Definition (List) page.

## Editing Columns

To modify an existing column in a list portlet:

1. Select the column to be modified and click Edit (or double-click the column).

The Edit Display Column: *<Column Title>* dialog box opens.

HP logo Close Window X

Edit Display Column: Status

\*Column Title: Status

\*Column Type: Text

\*Visible Text Source: STATUS Source contains HTML

Column Width: Small

Truncate after: Characters Show Full Text in Tooltip

Tooltip Source: Source contains HTML

User Sortable: Yes No

Display: Optional - Available for display by user  
By Default - Shown in user's initial view  
in Maximized View Only - Shown by default in Maximized View  
Always - Cannot be removed by user

Hyperlink Options: No Hyperlink  
Hyperlink Source: COPY\_URL  
Drilldown to Portlet: TMG - Total Hrs by Work Item Edit

Done Cancel

Copyright © 2004 Mercury Close Window X

2. Make the desired changes using the information from the table in [step 2 on page 102](#) as a guideline.



Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of that table.

3. Click **Done**.

The Edit Display Column: *<Column Title>* dialog box closes and any applicable changes are noted on the Create Portlet Definition (List) page.

## Deleting Columns

To delete an existing column from a list portlet:

1. Select the column to be removed.
2. Click **Delete**.

The column is deleted from the Create Portlet Definition (List) page.

## Bar Chart Portlet

Figure 3-5. Set up Display Options for bar chart portlets

**Create Portlet Definition (Bar Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. **Set up Display Options** ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Bar Source: PERIOD\_TYPE\_NAME ▼

Bar Axis Label:

\*Bar Value Source: PERIOD\_TYPE\_NAME ▼

Value Axis Label:

Orientation: Horizontal ▼

Color Source:

Tooltip Source:

Hyperlink Options:

- No Hyperlink
- Hyperlink Source: ACTUALS\_TO\_DATE ▼
- Drilldown to Portlet: (None)
- Portlet Event:

**Sample Bar Chart**

Bar A

Bar B

Bar C

Bar D

Bar E

(Bar Value) n n n n n n n n

Value Axis Label

Chart Title

Bar Axis Label

Value Axis Label

Tooltip

Cancel Back Next

Table 3-2. Set up Display Options field descriptions for bar chart portlets  
(page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Bar Source	Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source.
Bar Axis Label	Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length.)
*Bar Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source.
Value Axis Label	Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.)
Orientation	Indicate the orientation of the bars. Choices include: <ul style="list-style-type: none"> <li>• Horizontal</li> <li>• Vertical</li> </ul>

Table 3-2. Set up Display Options field descriptions for bar chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Color Source	<p>Select the source for the color.</p> <p>See <a href="#">Selecting Portlet Colors on page 120</a> for details.</p>
Tooltip Source	<p>Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.</p>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

# Clustered Bar Chart Portlet

Figure 3-6. Set up Display Options for clustered bar chart portlets

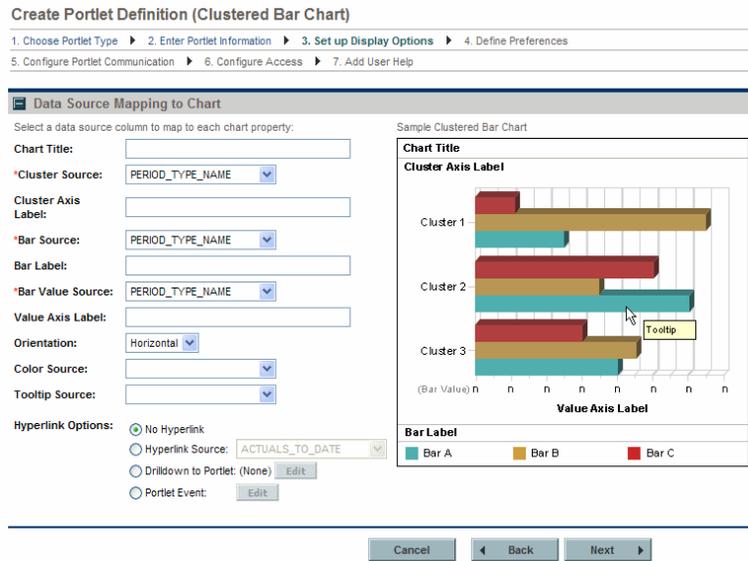


Table 3-3. Set up Display Options field descriptions for clustered bar chart portlets (page 1 of 3)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Cluster Source	Select a source column for the information to be displayed in the cluster. Choices are limited to those columns available in your portlet data source.
Cluster Axis Label	Specify the label for the cluster axis. Type any alphanumeric string (up to 200 characters in length.)
*Bar Source	Select a source column for the information to be displayed for the bars. Choices are limited to those columns available in your portlet data source.

Table 3-3. Set up Display Options field descriptions for clustered bar chart portlets (page 2 of 3)

Field Name (*Required)	Description
Bar Label	Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length.)
*Bar Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source.
Value Axis Label	Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.)
Orientation	Indicate the orientation of the bars. Choices include: <ul style="list-style-type: none"> <li>• Horizontal</li> <li>• Vertical</li> </ul>

Table 3-3. Set up Display Options field descriptions for clustered bar chart portlets (page 3 of 3)

Field Name (*Required)	Description
Color Source	<p>Select the source for the color.</p> <p>See <a href="#">Selecting Portlet Colors on page 120</a> for details.</p>
Tooltip Source	<p>Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.</p>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

# Stacked Bar Chart Portlet

Figure 3-7. Set up Display Options for stacked bar chart portlets

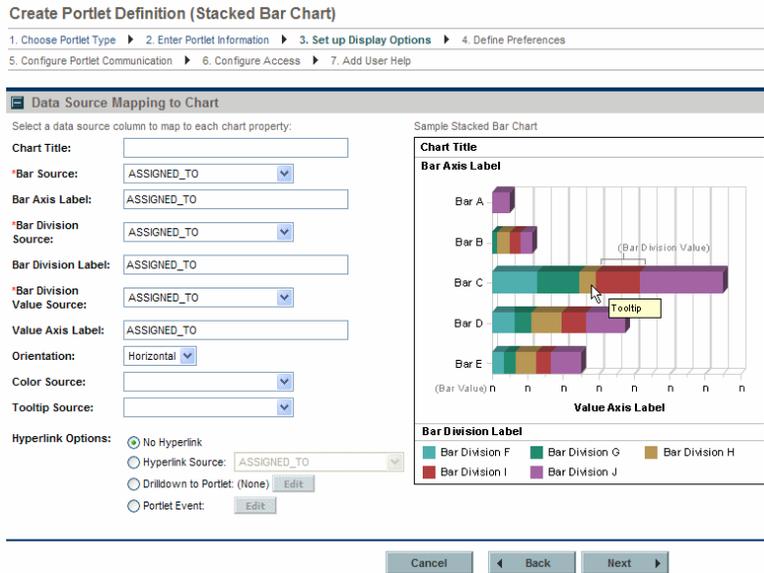


Table 3-4. Set up Display Options field descriptions for stacked bar chart portlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Bar Source	Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source.
Bar Axis Label	Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length).
*Bar Division Source	Select the source column for the bar divisions. Choices are limited to those columns available in your portlet data source.
Bar Division Label	Specify the label for the bar divisions.

Table 3-4. Set up Display Options field descriptions for stacked bar chart portlets (page 2 of 2)

Field Name (*Required)	Description
*Bar Division Value Source	<p>Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar).</p> <p>Choices are limited to those columns available in your portlet data source.</p>
Value Axis Label	<p>Specify the label for the value axis.</p> <p>Type any alphanumeric string (up to 200 characters in length.)</p>
Orientation	<p>Indicate the orientation of the bars.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• Horizontal</li> <li>• Vertical</li> </ul>
Color Source	<p>Select the source for the color.</p> <p>See <a href="#">Selecting Portlet Colors on page 120</a> for details.</p>
Tooltip Source	<p>Select the source column for the tooltip to be displayed when the cursor hovers over an item.</p> <p>Choices are limited to those columns available in your portlet data source.</p>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

Figure 3-8. Set up Display Options for pie chart portlets

**Create Portlet Definition (Pie Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. **Set up Display Options** ▶ 4. Define Preferences  
 5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

No Hyperlink

Hyperlink Source:

Drilldown to Portlet: (None)

Portlet Event:

Sample Pie Chart

Chart Title	Wedge Label
Total: N (Wedge Source Value Total)	
20% Wedge A	20% Wedge A
25% Wedge B	25% Wedge B
45% Wedge C	45% Wedge C
8% Wedge D	8% Wedge D
2% Wedge E	2% Wedge E

Table 3-5. Set up Display Options field descriptions for pie chart portlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Wedge Source	Select the source column for the wedge (pie slice). Choices are limited to those columns available in your portlet data source.
*Wedge Size Source	Select the <i>numeric</i> source column which determines the size of each wedge. Choices are limited to those columns available in your portlet data source.
Wedge Label	Specify a label for the wedges. Type any alphanumeric string (up to 200 characters in length).

Table 3-5. Set up Display Options field descriptions for pie chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Color Source	<p>Select the source for the color.</p> <p>See <a href="#">Selecting Portlet Colors on page 120</a> for details.</p>
Tooltip Source	<p>Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.</p>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

Figure 3-9. Set up Display Options for line chart portlets

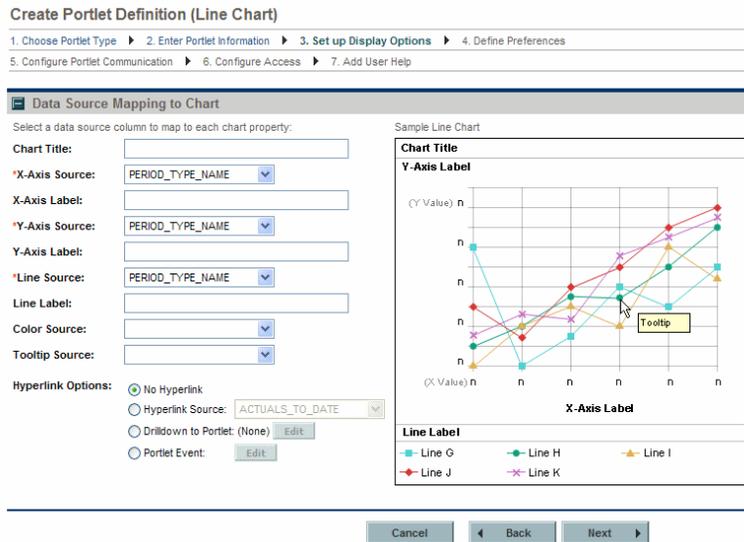


Table 3-6. Set up Display Options field descriptions for line chart portlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*X-Axis Source	Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source.
X-Axis Label	Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length).
*Y-Axis Source	Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source.

Table 3-6. Set up Display Options field descriptions for line chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Y-Axis Label	Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length).
*Line Source	Select the source column for each line. Choices are limited to those columns available in your portlet data source.
Line Label	Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length).
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 120</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

Figure 3-10. Set up Display Options for bubble chart portlets



Table 3-7. Set up Display Options field descriptions for bubble chart portlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*X-Axis Source	Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source.
X-Axis Label	Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length).
*Y-Axis Source	Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source.

Table 3-7. Set up Display Options field descriptions for bubble chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Y-Axis Label	Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length).
*Bubble Size Source	Select the source column for the size of the bubble. Choices are limited to those columns available in your portlet data source.
Bubble Size Label	Specify the label for the bubble size. Type any alphanumeric string (up to 200 characters in length).
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors</a> for details.
Color Label Source	Select the source for the labels associated with the colors.
Color Label	Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length).
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

# Selecting Portlet Colors

Most of the portlet types include the option to specify particular colors for a portlet. Unlike the default color map that selects and changes the colors seemingly at random, the colors you specify will always be used when the portlet is displayed.

To specify color mappings for a portlet requires configuration of the:

- Portlet data source
- Portlet definition

## Defining Color Maps in the Portlet Data Source

To specify a color map for a portlet, refer to [Chapter 2, \*Creating and Maintaining Portlet Data Sources\*, on page 17](#). In the section [Completing the Data Source Tab on page 26](#), you will need to add (or modify) columns to specify the color map.

In general, color mappings:

- Should correspond to the column used in the Order By clause
- Can be indicated for one or more of the Order By values
- Color can be specified by:
  - Name (such as LemonChiffon)
  - Hexadecimal code (for example, #FFFACD)

Names or codes are case-insensitive. That is, DarkGoldenRod is the same as DARKgoldenROD and #B8860B is the same as #b8860b.

[Appendix A, \*Color Names\*, on page 139](#), provides a comprehensive list of color names and some recommendations about their use.



Specific colors can also be specified based on portlet field labels; however, these settings are instance-wide. This can be especially helpful for making colors consistent for field labels such as High, Medium, or Low. See the *Customizing the Standard Interface* guide for details.

*Figure 3-11* shows examples of these settings in the **Select** section of the Select/From tab of the Query Definition window (see [Chapter 2, \*Creating and Maintaining Portlet Data Sources\*](#), on page 17 for details about this window).

- The values for priority\_code column include the priorities associated with a request (of the type being displayed in this portlet):
  - Normal
  - Low
  - High
  - Critical
  - None
- The Display\_Order column ranks the values of the priority codes
- The Order By clause specifies the use of the Display\_Order column
- The Color column specifies the relationship of the colors to the display order as follows:
  - Wheat (by hexadecimal code) for Normal
  - MistyRose for Low
  - The default color for High (which means the color is subject to change)
  - CadetBlue for Critical
  - Tomato for None



The colors shown in this example, as well as the choice of portlet are probably unrealistic. You probably want to select colors that are meaningful to your organization and more practical than those selected for this example.

Figure 3-11. Color map in the portlet data source

The screenshot shows a 'Query Definition' dialog box with a blue title bar. It has tabs for 'Select/From', 'Where/Filter', and 'Group By/Order By'. The 'Select' tab is active. Below the tabs, there is a text area with the instruction: 'You can use any Database columns or SQL expression to create columns for the SELECT portion of the query and enter the FROM portion directly.'

Column Name	Column Type	Description	SQL
something1	Text	something1	something1
priority_code	Text	priority_code	decode(priority_code,NULL,'None',priority_code,priority_code)
Color	Text	color	decode(priority_code,NULL,'tomato','NORMAL','F5DEB3','LOW','mistyrose','CRITICAL','CadetBlue')
Display_order	Text	order	decode(priority_code,NULL,1,'NORMAL',2,'LOW',3,'HIGH',4,'CRITICAL',5)

Below the table are 'Add', 'Edit', and 'Remove' buttons. The 'From Clause:' section contains a text area with 'FROM somewhere' and an 'Enlarge' button. The 'Where/Group By/Order By Clauses:' section contains a text area with 'WHERE 1=1', 'group by priority\_code', and 'order by display\_order'. At the bottom, there are 'View Full Query', 'OK', 'Apply', and 'Cancel' buttons, and a 'Ready' status indicator.

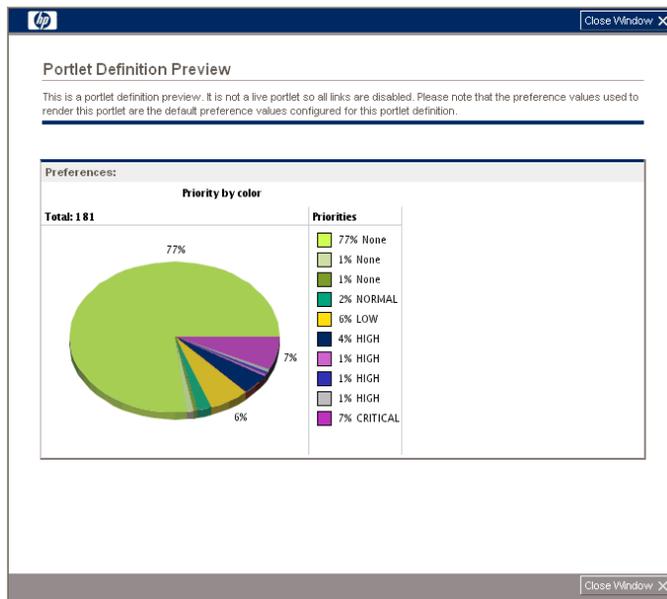
## Specifying the Color Map in the Portlet Definition

Once a portlet data source includes a color map, you can specify its use in a color specification–enabled portlet.

*Figure 3-12* shows a preview of a pie chart that uses the default color map.

As shown in *Figure 3-14* on page 125, specifying a color map can help establish consistency of the portlet coloration and, potentially, its interpretation.

Figure 3-12. Default color map



To specify use of a color map available in a portlet's data source, select the color map's column for the **Color Source** as shown in *Figure 3-13*.

Figure 3-13. Set up Display Options with color specification

HP Project and Portfolio Management Center

Welcome, Admin User  
May 12, 2006 02:07:46 PM PDT

Expand All Collapse All

Dashboard

Demand Management

Project Management

Time Management

Resource Management

Program Management

Portfolio Management

Financial Management

Deployment Management

Reports

Administration

Product Information

Create A Request > Search for a Portlet Definition to Configure > Search Results > create Portlet Definition > Create Portlet Definition

### Create Portlet Definition (Pie Chart)

1. Choose Portlet Type > 2. Enter Portlet Information > 3. Set up Display Options > 4. Define Preferences  
5. Configure Access > 6. Add User Help

#### Data Source Mapping to Chart

Select a data source column to map to each chart property:

**Chart Title:** Priority by color

**Wedge Source:** priority\_code

**Wedge Size Source:** Total

**Wedge Label:** Priorities

**Color Source:** Color

**Tooltip Source:**

**Hyperlink Options:**

- No Hyperlink
- Hyperlink Source: Color
- Drilldown to Portlet: (None)

**Sample Pie Chart**

**Chart Title:** Total: N (Wedge Source Value Total)

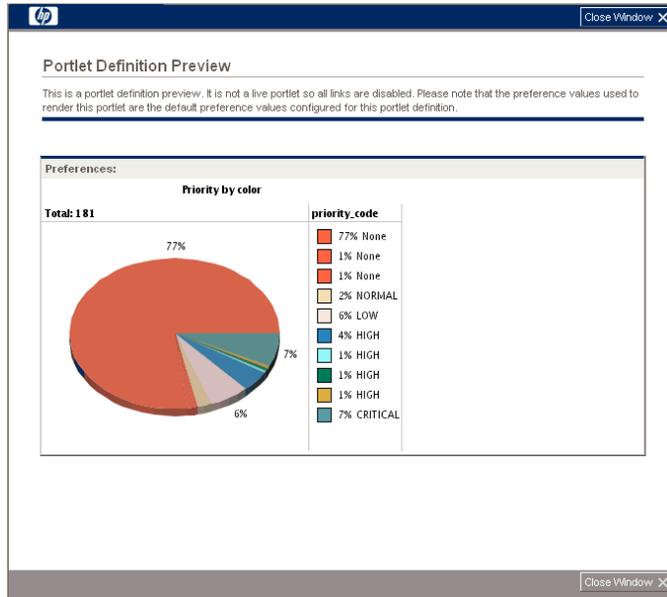
Wedge Label
20% Wedge A
25% Wedge B
45% Wedge C
8% Wedge D
2% Wedge E

25% 20% 2% 8% 45% (Wedge Size)

Cancel Back Next

The resulting preview is shown in *Figure 3-14*.

Figure 3-14. Selected color mappings





---

# 4 Creating and Maintaining PPM Dashboard Pages and Modules

## About PPM Dashboard Pages and Modules

Modules are either provided by HP or application administrators and can be supplied to users as either preconfigured Dashboard pages or “shared.” Modules must have a unique name and can contain one or more Dashboard pages, each with one or more portlets.

### Preconfigured Dashboard Pages

Preconfigured Dashboard pages are modules that users can add to their Private pages folder. These pages are useful in situations where users routinely use the same (basic) page setup. These preconfigured Dashboard pages can be edited and personalized by users to increase their usefulness. Preconfigured Dashboard pages are provided by either HP or application administrators.

#### HP-Provided Preconfigured Pages

Preconfigured Dashboard pages that are provided by HP are added using the **Add preconfigured pages** drop-down menu item located on the Personalize Dashboard page (see *Figure 4-1*). Once clicked, the Add Preconfigured Pages to Dashboard dialog box opens (see *Figure 4-2*).

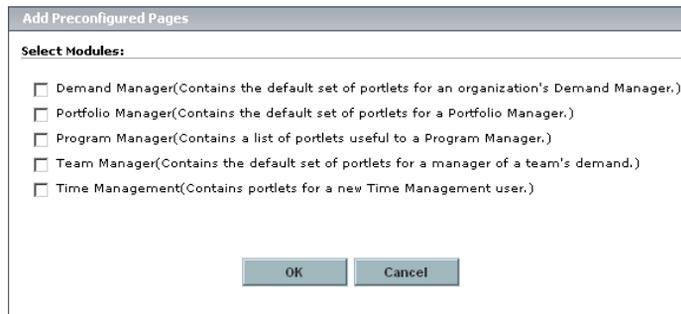
## Application Administrator-Provided Preconfigured Pages

Preconfigured Dashboard pages that are provided by application administrators appear in the Shared pages folder on the Personalize Dashboard page (such as Sample, shown in *Figure 4-1*). Once moved to the Private pages folder (using **Copy** and **Paste** functionality) the module can be personalized by the user; modules appearing in the Shared pages folder cannot be edited.

Figure 4-1. Personalize Dashboard page



Figure 4-2. Add Preconfigured Pages to Dashboard dialog box



## Shared Dashboard Pages

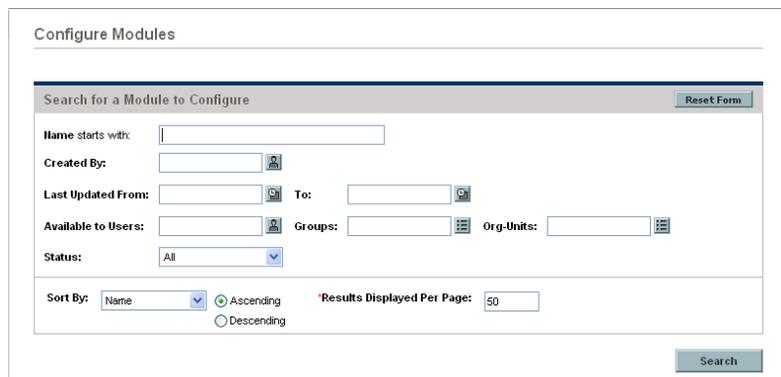
Shared Dashboard pages are modules that are created by application administrators and users find these in their Shared pages folder. Shared modules can be configured such that users can copy them to the Private pages folder and edit them (therefore behaving much like preconfigured Dashboard pages), or shared modules can be made uneditable—these type of modules are especially useful when application administrators want to share specific details and status with their stakeholders.

## Searching for Modules

To search for an existing module:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Modules > Configure Modules**.

The Configure Modules page appears.



The screenshot shows the 'Configure Modules' page with a search form. The form is titled 'Search for a Module to Configure' and includes a 'Reset Form' button. The search criteria are as follows:

- Name starts with:** [Text input field]
- Created By:** [Text input field with user icon]
- Last Updated From:** [Text input field with calendar icon] **To:** [Text input field with calendar icon]
- Available to Users:** [Text input field with user icon] **Groups:** [Text input field with group icon] **Org-Units:** [Text input field with org-unit icon]
- Status:** [Dropdown menu with 'All' selected]
- Sort By:** [Dropdown menu with 'Name' selected]  Ascending  Descending
- Results Displayed Per Page:** [Text input field with '50' entered]

A 'Search' button is located at the bottom right of the form.

3. Provide the search criteria using the information from the following table.

Field Name (*Required)	Description
Name starts with	Specify a string. The search results display all modules whose name starts with the specified string. Type any alphanumeric string (up to 255 characters in length).
Created By	Select the user who created the module.
Last Updated From <Date> To <Date>	Select the date range when the module was last updated.
Available to Users	Select one or more users who have access to the module.
Groups	Select one or more groups who have access to the module.
Org-Units	Select one or more groups who have access to the module.
Status	Select the status criteria: Choices include: <ul style="list-style-type: none"> <li>• All</li> <li>• Enabled</li> <li>• Disabled</li> </ul>
Sort By	Select the sort criteria. Choices include: <ul style="list-style-type: none"> <li>• Name</li> <li>• Last Updated On</li> <li>• Status</li> </ul>
Ascending/Descending	Indicate the sorting sequence.
*Results Displayed Per Page	Specify the maximum number of search results to display on a page. Type any integer, including zero.



Click **Reset Form** if you would like to clear your current search criteria.

#### 4. Click **Search**.

The Configure Modules page is updated to include the search results which are displayed in the **Select a Module to Configure** section. If the list of results is long, click **Prev** and **Next** to navigate the list.

Configure Modules

These Modules are maintained only by Administrators. Users that wish to personalize module pages must copy the pages to their private dashboard area.

Select a Module to Configure				Showing 1 to 10 of 10	Prev	Next
Name ▲	Description	Last Updated On	Status			
<input type="checkbox"/> AH - TEMP	just a test. should be deleted	March 12, 2007	Enabled			
<input type="checkbox"/> AH - test 2		March 12, 2007	Enabled			
<input type="checkbox"/> Capital Exposure	Dashboard to display the state of capitalized costs in the current portfolio broken down by project.	March 12, 2007	Enabled			
<input type="checkbox"/> Demand Manager	Contains the default set of portlets for an organization's Demand Manager.	March 12, 2007	Enabled			
<input type="checkbox"/> New Module	dsmplr	March 12, 2007	Enabled			
<input type="checkbox"/> Portfolio Manager	Contains the default set of portlets for a Portfolio Manager.	March 12, 2007	Enabled			
<input type="checkbox"/> Program Manager	Contains a list of portlets useful to a Program Manager.	March 12, 2007	Enabled			
<input type="checkbox"/> Standard PPM Dashboard	Standard PPM Dashboard	March 12, 2007	Enabled			
<input type="checkbox"/> Team Manager	Contains the default set of portlets for a manager of a team's demand.	March 12, 2007	Enabled			
<input type="checkbox"/> Time Management	Contains portlets for a new Time Management user.	March 12, 2007	Enabled			

Configure Modules

Search for a Module to Configure

Name starts with:

Created By:

Last Updated From:   To:

Available to Users:   Groups:   Org-Units:

Status:

Sort By:   Ascending  Descending **Results Displayed Per Page:**

From the Configure Modules page you can:

- **Select a module.** In the **Select a Module to Configure** section, either select the checkbox associated with the desired module or click the link for the module.
- **Delete a module.** In the **Select a Module to Configure** section, click the delete icon next to the module you want to delete.
- **Sort the modules.** In the **Select a Module to Configure** section, click on a column header to change the sort criteria or sequence.
- **Refine your search.** In the **Search for a Module to Configure** section, provide the search criteria detailed in [step 3](#).

# Creating Modules

To create a module:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Modules > Create a Module**.

The Create Module page appears.

Create Module

Create

Header

Module Name: New Module 0

Description:

Enabled:  Yes  No

Create



If you are already in the Personalize Dashboard page, you can highlight **Modules** and select **New Module** from the drop-down menu to create a new module.

3. In the **Module Name** field, type the name of the module.
4. (Optional, although highly recommended) In the **Description** field, type a brief description of the module.
5. (Optional) Select the desired **Enabled** option.

6. Click **Create**.

The Personalize Dashboard page appears and includes the Configure: <Module\_Name> display.

The screenshot shows a web browser window with the title "Configure: New Module 0". On the left is a navigation tree with "Modules", "New Module 0", and "New Page". The main content area has a "Save" button at the top right. Below it are three sections: "Header" with fields for "Created By", "Last Modified By", "Last Modification Date", "Module Name", "Description", and "Enabled"; "Administrator Comments" with a text area and "View Comments" button; and "Configure Access" with "Read-Only Access" and "Administrator Access" sub-sections.



The contents of the page may differ depending on the module chosen.

7. (Optional) In the **Header** section, update the data in the appropriate fields.
8. (Optional, although highly recommended) In the **Administrator Comments** section, add comments as desired.



Click **Save** before clicking **View Comments** to view the comments you just added.

9. In the **Configure Access** section, specify to whom, and the type of, access of the module should be granted.

10. Add Dashboard pages and portlets as desired.

a. To add a page, either:

- Select the **New Page** file from the folder containing the new module
- Select the module from the Modules folder and select either **Add > Add New Page** or **Add > Add user pages** (following a right-click).

The Personalize Dashboard page appears and includes the Edit page display.

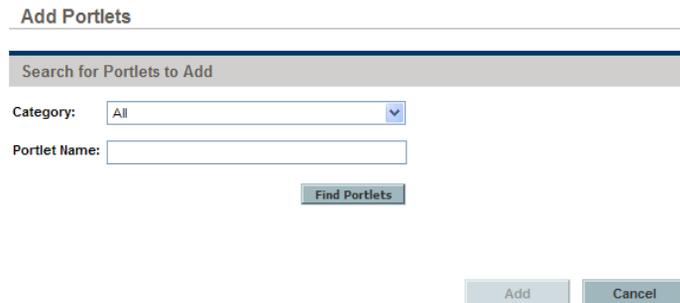


b. (Optional) Rename the page.

c. (Optional) Set the page refresh rate.

d. Click **Add Portlets**.

The Add Portlets dialog box appears.



e. Search for portlets to add.

- To list all the portlets, click **Find Portlets**. The **Select Portlets to Add** section is added to the Add Portlets dialog. The **Select Portlets to Add** section lists all the portlets.

- To list specific portlets:
  - i. In **Category**, select the portlet's category from the drop-down list.
  - ii. In **Portlet Name**, enter all or part of the portlet's name.
  - iii. Click **Find Portlets**.

The **Select Portlets to Add** section is added to the Add Portlets dialog. The **Select Portlets to Add** section lists all of the portlets matching the search criteria.

- f. In the **Select Portlets to Add** section, select one or more portlets and click **Add**.
  - g. (Optional) Click **Preview** to review the results.
11. Repeat [step 10](#) until the module is configured as desired.

## Sharing Modules

To share a module:

1. Select the module name from the Modules folder.
2. In the Header section, select the **Yes** option for **Enabled**.
3. In the Configure Access section, select the **Allow access to all users** and **Enable users to copy this module pages to their private dashboard** checkboxes.
4. Click **Save**.

# Copying Modules

To copy an existing module and use it as the basis for a new module:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Modules > Configure Modules**.

The Configure Modules page appears, as shown in [step 2 on page 129](#).

3. Search for and select a module.

For complete information on how to search for and select modules, see [Searching for Modules on page 129](#).

The Personalize Dashboard page appears, as shown in [step 6 on page 133](#).

4. Select the name of the module from the Modules folder.
5. Click the **Clone** icon (or right-click the module name and select **Clone**).

An advisory dialog box appears.

6. Click **OK**.

A copy of the module will appear in the Modules folder.

7. Select the name of the copied module.
8. Change the settings of the copied module using the steps detailed in [Creating Modules on page 132](#).



Remember to enable the module once the settings are updated.

9. Click **Save**.

# Modifying Modules

To change an existing module:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Modules > Configure Modules**.

The Configure Modules page appears, as shown in [step 2 on page 129](#).

3. Search for and select a module.

For detailed instructions on how to search for and select modules, see [Searching for Modules on page 129](#).

The Personalize Dashboard page appears, as shown in [step 6 on page 133](#).

4. From this page, you can do the following:
  - Change the contents or accessibility of a module, see [Creating Modules on page 132](#).
  - Copy the module, see [Copying Modules on page 136](#).
  - Remove the module, see [Deleting Modules](#).

# Deleting Modules

To delete an existing module:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Modules > Configure Modules**.

The Configure Modules page appears, as shown in [step 2 on page 129](#).

3. Search for and select a module.

For complete information on how to search for and select modules, see [Searching for Modules on page 129](#).

The Personalize Dashboard page appears, as shown in [step 6 on page 133](#).

4. Select the name of the module from the Modules folder.
5. Click the **Delete** icon (or right-click the module name and select **Delete**).

A confirmation dialog box opens.

6. Click **OK**.

# A Color Names

This appendix provides the table of color names that are supported by most browsers. These are the color names referenced in *Selecting Portlet Colors* on page 120.

It is important to note that only 16 color names are supported in the W3C HTML 4.0 standard (aqua, black, blue, fuchsia, gray, green, lime, maroon, navy, olive, purple, red, silver, teal, white, and yellow). If you have concerns about browser compatibility, or are planning to export the portlet, you should use the hexadecimal values rather than the color names.

To view the colors themselves, go to [www.w3.org/TR/css3-color/#html4](http://www.w3.org/TR/css3-color/#html4) and locate the section documenting SVG color keywords.

Table A-1. Color names (page 1 of 7)

Color Name	Hex Value
AliceBlue	#F0F8FF
AntiqueWhite	#FAEBD7
Aqua	#00FFFF
Aquamarine	#7FFFD4
Azure	#F0FFFF
Beige	#F5F5DC
Bisque	#FFE4C4
Black	#000000
BlanchedAlmond	#FFEBCD

Table A-1. Color names (page 2 of 7)

Color Name	Hex Value
Blue	#0000FF
BlueViolet	#8A2BE2
Brown	#A52A2A
BurlyWood	#DEB887
CadetBlue	#5F9EA0
Chartreuse	#7FFF00
Chocolate	#D2691E
Coral	#FF7F50
CornflowerBlue	#6495ED
Cornsilk	#FFF8DC
Crimson	#DC143C
Cyan	#00FFFF
DarkBlue	#00008B
DarkCyan	#008B8B
DarkGoldenrod	#B8860B
DarkGray	#A9A9A9
DarkGreen	#006400
DarkKhaki	#BDB76B
DarkMagenta	#8B008B
DarkOliveGreen	#556B2F
DarkOrange	#FF8C00
DarkOrchid	#9932CC
DarkRed	#8B0000
DarkSalmon	#E9967A

Table A-1. Color names (page 3 of 7)

<b>Color Name</b>	<b>Hex Value</b>
DarkSeaGreen	#8FBC8F
DarkSlateBlue	#483D8B
DarkSlateGray	#2F4F4F
DarkTurquoise	#00CED1
DarkViolet	#9400D3
DeepPink	#FF1493
DeepSkyBlue	#00BFFF
DimGray	#696969
DodgerBlue	#1E90FF
Feldspar	#D19275
FireBrick	#B22222
FloralWhite	#FFFAF0
ForestGreen	#228B22
Fuchsia	#FF00FF
Gainsboro	#DCDCDC
GhostWhite	#F8F8FF
Gold	#FFD700
GoldenRod	#DAA520
Gray	#808080
Green	#008000
GreenYellow	#ADFF2F
HoneyDew	#F0FFF0
HotPink	#FF69B4
IndianRed	#CD5C5C

Table A-1. Color names (page 4 of 7)

Color Name	Hex Value
Indigo	#4B0082
Ivory	#FFFFFF0
Khaki	#F0E68C
Lavender	#E6E6FA
LavenderBlush	#FFF0F5
LawnGreen	#7CFC00
LemonChiffon	#FFFACD
LightBlue	#ADD8E6
LightCoral	#F08080
LightCyan	#E0FFFF
LightGoldenrodYellow	#FAFAD2
LightGrey	#D3D3D3
LightGreen	#90EE90
LightPink	#FFB6C1
LightSalmon	#FFA07A
LightSeaGreen	#20B2AA
LightSkyBlue	#87CEFA
LightSlateBlue	#8470FF
LightSlateGray	#778899
LightSteelBlue	#B0C4DE
LightYellow	#FFFFE0
Lime	#00FF00
LimeGreen	#32CD32
Linen	#FAF0E6

Table A-1. Color names (page 5 of 7)

Color Name	Hex Value
Magenta	#FF00FF
Maroon	#800000
MediumAquaMarine	#66CDAA
MediumBlue	#0000CD
MediumOrchid	#BA55D3
MediumPurple	#9370D8
MediumSeaGreen	#3CB371
MediumSlateBlue	#7B68EE
MediumSpringGreen	#00FA9A
MediumTurquoise	#48D1CC
MediumVioletRed	#C71585
MidnightBlue	#191970
MintCream	#F5FFFA
MistyRose	#FFE4E1
Moccasin	#FFE4B5
NavajoWhite	#FFDEAD
Navy	#000080
OldLace	#FDF5E6
Olive	#808000
OliveDrab	#6B8E23
Orange	#FFA500
OrangeRed	#FF4500
Orchid	#DA70D6
PaleGoldenrod	#EEE8AA

Table A-1. Color names (page 6 of 7)

Color Name	Hex Value
PaleGreen	#98FB98
PaleTurquoise	#AFEEEE
PaleVioletRed	#D87093
PapayaWhip	#FFEFD5
PeachPuff	#FFDAB9
Peru	#CD853F
Pink	#FFC0CB
Plum	#DDA0DD
PowderBlue	#B0E0E6
Purple	#800080
Red	#FF0000
RosyBrown	#BC8F8F
RoyalBlue	#4169E1
SaddleBrown	#8B4513
Salmon	#FA8072
SandyBrown	#F4A460
SeaGreen	#2E8B57
SeaShell	#FFF5EE
Sienna	#A0522D
Silver	#C0C0C0
SkyBlue	#87CEEB
SlateBlue	#6A5ACD
SlateGray	#708090
Snow	#FFFAFA

Table A-1. Color names (page 7 of 7)

Color Name	Hex Value
SpringGreen	#00FF7F
SteelBlue	#4682B4
Tan	#D2B48C
Teal	#008080
Thistle	#D8BFD8
Tomato	#FF6347
Turquoise	#40E0D0
Violet	#EE82EE
VioletRed	#D02090
Wheat	#F5DEB3
White	#FFFFFF
WhiteSmoke	#F5F5F5
Yellow	#FFFF00
YellowGreen	#9ACD32



# Index

- A**
  - access grants
    - Edit Portlet Definition, [37](#)
    - Ownership Override, [37](#)
  - adding
    - list portlet columns, [101](#)
    - portlet categories, [97](#)
  - application administrator-provided
    - preconfigured Dashboard pages, [128](#)
- B**
  - bar chart portlet, [106](#)
    - display options, [107](#)
  - bind variables, [26](#)
  - bubble chart portlet, [118](#)
    - display options, [118](#)
  - builder portlets, [47](#), [49](#)
- C**
  - clustered bar chart portlet, [109](#)
    - display options, [109](#)
  - color map
    - defining in portlet data sources, [120](#)
    - selecting in portlet definitions, [123](#)
  - colors
    - hexadecimal values, [139](#)
    - names, [139](#)
- copying
  - modules, [136](#)
  - portlet data sources, [39](#)
  - portlet definitions, [64](#)
- Create Portlet Definition wizard, [53](#)
- creating
  - modules, [132](#)
  - portlet data sources, [21](#)
  - portlet definitions, [53](#)
  - portlets, [15](#)
- D**
  - Dashboard, [13](#)
  - Dashboard pages, [13](#)
    - administrator-provided, [128](#)
    - HP-provided, [127](#)
    - preconfigured, [127](#)
    - shared, [129](#)
  - Data Source tab
    - portlet data sources, [26](#)
  - defining
    - drill-down pages, [78](#), [80](#)
    - portlet data source color map, [120](#)
    - portlet events, [94](#)
  - deleting
    - list portlet columns, [106](#)
    - modules, [138](#)
    - portlet categories, [98](#)
    - portlet data sources, [40](#)
    - portlet definitions, [68](#)

- display options
  - bar chart portlet, [107](#)
  - bubble chart portlet, [118](#)
  - clustered bar chart portlet, [109](#)
  - line chart portlet, [116](#)
  - list portlets, [100](#)
  - pie chart portlet, [114](#)
  - stacked bar chart portlet, [112](#)
- drill-down pages
  - defining, [78](#), [80](#)
- E**
- editing
  - list portlet columns, [105](#)
- F**
- Filter clause, [31](#)
- Filter Fields tab
  - portlet data sources, [35](#)
- From clause, [28](#)
- G**
- Group By clause, [33](#)
- H**
- Having clause, [34](#)
- HP-provided preconfigured Dashboard pages, [127](#)
- I**
- Import Portlet Definition wizard, [69](#), [73](#)
- importing
  - Java portlet definitions, [69](#)
  - WSRP portlet definitions, [73](#)

- J**
- Java portlet definitions, [49](#), [69](#)
- Java portlets, [14](#), [47](#)
- L**
- line chart portlet, [116](#)
  - display options, [116](#)
- list portlet, [99](#)
- list portlets
  - adding columns, [101](#)
  - deleting columns, [106](#)
  - display options, [100](#)
  - editing columns, [105](#)
- M**
- managing
  - portlet categories, [97](#)
- migrating
  - portlet definitions, [77](#)
- modifying
  - modules, [137](#)
  - portlet definitions, [65](#)
- modules, [13](#), [127](#)
  - copying, [136](#)
  - creating, [132](#)
  - deleting, [138](#)
  - modifying, [137](#)
  - searching, [129](#)
  - sharing, [135](#)
- O**
- opening
  - Create Portlet Definition wizard, [53](#)
  - Import Portlet Definition wizard, [69](#)
- Order By clause, [33](#)
- Ownership tab
  - portlet data sources, [37](#)

- P**
- pie chart portlet, **114**
    - display options, **114**
  - portlet categories
    - adding, **97**
    - deleting, **98**
    - managing, **97**
  - portlet data sources, **14**
    - color map, **120**
    - column types, **43**
    - components, **17**
    - copying, **39**
    - creating, **21**
    - currency column type, **46**
    - Data Source tab, **26**
    - deleting, **40**
    - Filter clause, **31**
    - Filter Fields tab, **35**
    - From clause, **28**
    - general information section, **24**
    - Group By clause, **33**
    - Group By/Order By tab, **33**
    - Having clause, **34**
    - hyperlink column type, **44**
    - Order By clause, **33**
    - overview of, **17**
    - Ownership tab, **37**
    - relationship to portlet definitions, **18**
    - searching for, **19**
    - Select statement, **28**
    - Select/From tab, **28**
    - text-based column type, **43**
    - viewing, **19**
    - Where clause, **30**
    - Where/Filter tab, **30**
  - portlet definitions, **14, 47**
    - builder portlets, **49**
    - color map, **123**
    - configuring access, **61**
    - copying, **64**
    - Create Portlet Definition wizard, **53**
    - creating, **53**
    - deleting, **68**
    - display options, **56**
    - drill-down pages, **78**
    - HP-imported, **49**
    - HP-supplied, **48**
    - Import Portlet Definition wizard, **69, 73**
    - importing Java portlets, **69**
    - importing WSRP portlets, **73**
    - Java portlets, **49**
    - migrating, **77**
    - modifying, **65**
    - portlet communication, **60**
    - portlet information, **54**
    - portlet types, **53**
    - preferences, **57**
    - relationship to portlet data sources, **18**
    - searching for, **50**
    - standard, **49**
    - user help, **63**
    - viewing, **42**
    - WSRP portlets, **49**
  - portlet types
    - bar chart portlet, **106**
    - bubble chart portlet, **118**
    - clustered bar chart portlet, **109**
    - line chart portlet, **116**
    - list portlet, **99**
    - pie chart portlet, **114**
    - portlet definitions, **53**
    - stacked bar chart portlet, **112**
  - portlets, **13**
    - See also* portlet categories.
    - See also* portlet data sources.
    - See also* portlet definitions.
    - See also* portlet types.
    - builder, **47**
    - creating, **15**
    - Java, **14, 47**
    - selecting colors, **120**
    - support, **14**
    - WSRP, **14, 47**
  - preconfigured Dashboard pages, **127**
    - administrator-provided, **128**
    - HP-provided, **127**

## **S**

searching

- for modules, [129](#)
- for portlet data sources, [19](#)
- for portlet definitions, [50](#)

Select statement, [28](#)

selecting

- portlet colors, [120](#)
- portlet definition color map, [123](#)

shared Dashboard pages, [129](#)

sharing

- modules, [135](#)

stacked bar chart portlet, [112](#)

- display options, [112](#)

standard portlet definitions, [49](#)

## **V**

variables, bind, [26](#)

viewing

- portlet data sources, [19](#)
- portlet definitions, [42](#)

## **W**

Where clause, [30](#)

wizards

- Create Portlet Definition, [53](#)
- Import Portlet Definition, [69](#), [73](#)

WSRP portlet definitions, [49](#), [73](#)

WSRP portlets, [14](#), [47](#)