

HP Project and Portfolio Management Center

Software Version: 7.5

Getting Started

Document Release Date: June 2008
Software Release Date: June 2008



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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.

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Support

You can visit the HP Software Support Web site at 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.

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

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1 Introduction

Overview of HP Project and Portfolio Management Center

Welcome to HP Project and Portfolio Management Center!

This guide provides the basic details you need to navigate PPM Center. The guide also describes how to perform common tasks and personalize your pages to make them work best for you.

Most PPM Center users work in the standard user interface, which appears as a collection of specialized Web pages. These pages open in a Web browser and offer you a customized view into PPM Center. From these pages, you can run reports, submit requests, and create projects, among other things. Most importantly, you view and use the PPM Dashboard. The PPM Dashboard is a real-time Web page view into your PPM Center system. Using portlets, you can view important information about your work environment, from the status of requests assigned to you, to comparisons between current projects and staffing profiles.

In addition to the standard user interface, some users need to use the PPM Workbench to accomplish certain tasks. Unlike the Web pages, which open in a Web browser, the PPM Workbench opens in its own window. Designed for more advanced users, the PPM Workbench is where much of the PPM Center is configured. Configurators can use the PPM Workbench to define workflows, create request types, set up automatic notifications, and a host of other tasks and procedures.

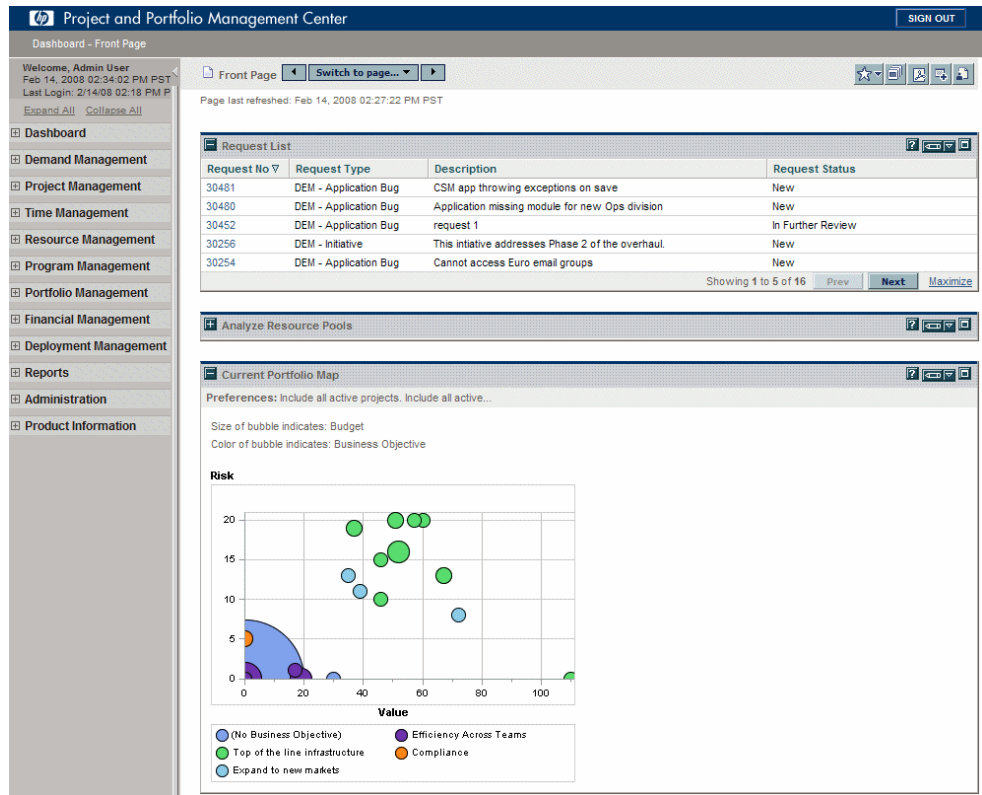


Your view of PPM Center is determined by your level of access to features and data, which is set by your system administrator. The set of pages, portlets, and fields that you see may be different from another user's, depending on the level of access provided to you.

Web Pages

The PPM Center standard user interface appears as a set of specialized Web pages that open in a Web browser and offer you a customized view into PPM Center. From these pages, you can run reports, create requests, search for packages, and accomplish many other tasks. *Figure 1-1* shows a typical page.

Figure 1-1. PPM Center page



The PPM Center has the following components:

- **PPM Dashboard.** The PPM Dashboard is at the heart of the standard user interface. Using the PPM Dashboard, you can obtain accurate, up-to-the-minute status on your projects and deliverables. With the PPM Dashboard, project teams always know exactly where they stand. Managers gain real-time insight into progress and problems in projects under their purview. Executives can view all initiatives from an IT value perspective at a high level, ensuring alignment with the company's overall strategic direction.
- **Navigation path.** Above the PPM Dashboard is the navigation path. The navigation path lists the pages opened during the current PPM Dashboard session. Users can access previously visited pages by selecting entries on the navigation path.
- **Menu bar.** The menu bar presents a hierarchical organization of menus, submenus, and menu items. Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. Some links, like **Administration > Program Processes > Manage Issue Process**, open windows in the PPM Workbench.



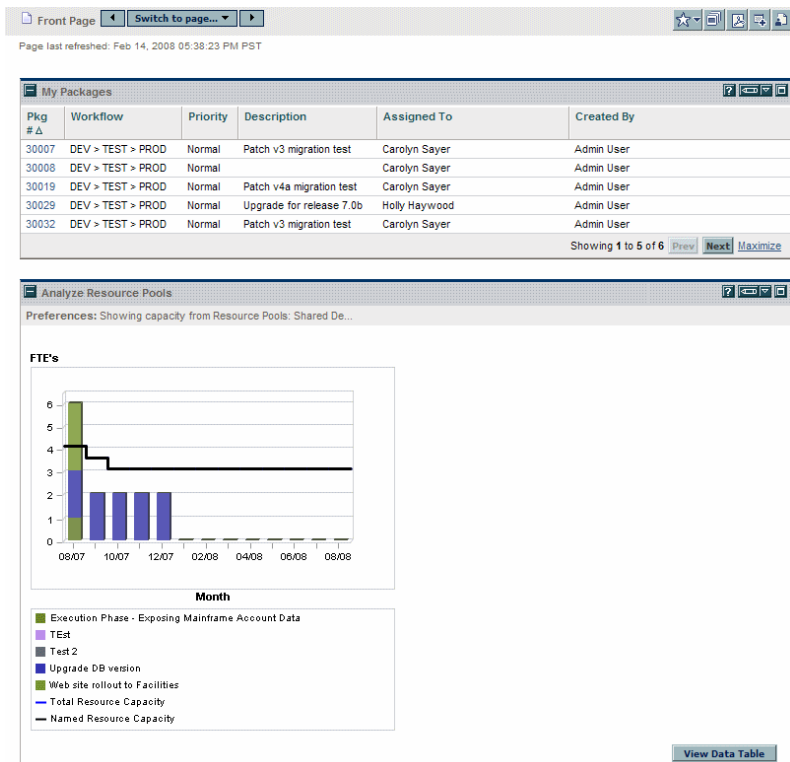
If you have a pop-up blocker or download blocker active on your Web browser, you may have difficulties using the Web pages.

PPM Dashboard Pages

PPM Dashboard pages are a way of organizing application data. One PPM Dashboard page can be devoted to project information while another can be reserved for a PPM Center product, such as HP Demand Management or HP Portfolio Management. How you organize your data is entirely up to you.

At the top of each PPM Dashboard page is a label used to identify a PPM Dashboard page. *Figure 1-2* shows a PPM Dashboard page.

Figure 1-2. Typical PPM Dashboard page



PPM Dashboard pages can come from several different sources. Most of the time, you can pick and choose the PPM Dashboard page and its content, but not always. The following is a list of the different types of PPM Dashboard pages.

- **Default PPM Dashboard page.** The default PPM Dashboard page is the first PPM Dashboard page you see when you log on to PPM Center. For users who have personalized their PPM Dashboard, it is the first private page on the list; for new users, it is the first shared page on the list.
- **Private PPM Dashboard pages.** Private PPM Dashboard pages are created and configured by you. You can add portlets to a private page, move it up or down in the list of pages, or delete it.
- **Shared PPM Dashboard pages.** Shared PPM Dashboard pages are configured by your application administrator and published to one or many users. You cannot edit a shared PPM Dashboard page. Shared PPM

Dashboard pages are created as modules. For detailed information on creating modules, see the *Creating Portlets and Modules* guide.

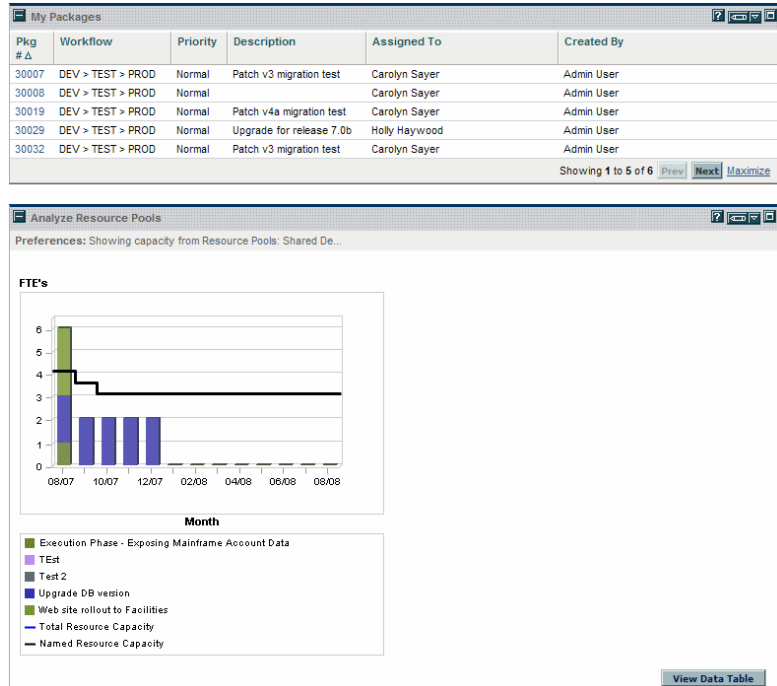
- **Blank pages.** Blank pages are PPM Dashboard pages without portlets. Once you add a blank PPM Dashboard page to your PPM Dashboard, you can configure the PPM Dashboard page to your specifications.

Portlets

Portlets reside on PPM Dashboard pages and display real-time data you want to see. Portlets are very configurable, allowing you to filter through all the data in the system, finding just what you need. There are two basic types of portlets:

- **List portlets.** List portlets present data in tabular form using rows and columns. *Figure 1-3* shows the Request List portlet.
- **Chart portlets.** Chart portlets present data in a graphical form, such as bar charts, pie charts, and bubble charts. *Figure 1-3* shows the Open Request By Priority chart portlet.

Figure 1-3. Typical portlets

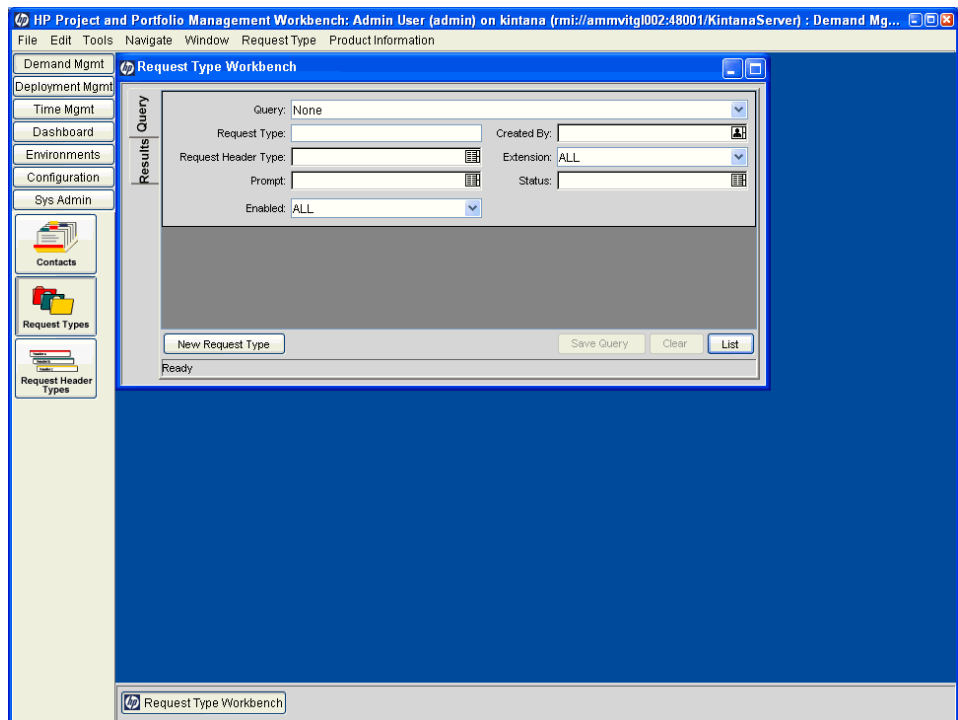


A portlet's edit page is where a portlet is personalized to meet your specific needs. Every portlet edit page has a **Preferences** section. The **Preferences** section is where you configure the filtering and/or sorting to determine what and/or how to display data you want to see. If your portlet is a list portlet, you also have a **Choose Display Columns** section. The **Choose Display Columns** section lets you decide which columns will appear in the portlet.

PPM Workbench

For most PPM Center users, tasks are started and completed in the Web pages; some users, however, need to use the PPM Workbench for their work. The PPM Workbench is designed to help application administrators, configurators, and advanced users configure PPM Center. *Figure 1-4* shows the PPM Workbench.

Figure 1-4. PPM Workbench



The PPM Workbench opens in its own window, not in a Web browser window. You can open the PPM Workbench through the standard interface's **Administration > Open Workbench** menu item or from shortcuts you create on your desktop.

The PPM Workbench has the following components (see *Figure 1-4*):

- **PPM Workbench window.** PPM Workbench windows are used to find and act on configuration entities, such as request types, object types, and workflows. Each configuration entity has its own unique PPM Workbench window. You can reach a configuration entity Workbench window using the shortcut bar.
- **Shortcut bar.** The shortcut bar is used to organize the configuration entity Workbench windows. Each configuration entity Workbench window belongs to a screen group, such as Demand Mgmt, Time Mgmt, or Configuration. When a screen group is selected, the associated PPM Workbench windows are displayed as icons in the shortcut bar (see *Figure 1-4*).
- **PPM Workbench menu.** The PPM Workbench menu provides configuration functionality to the PPM Workbench. This includes such things as user profile settings and regional settings. In addition, some PPM Workbench windows, such as packages, add an extra menu when that PPM Workbench window is selected.

Viewing Product Information and Online Documentation

At the bottom of the menu bar is the **Product Information** menu. The **Product Information** menu provides you with access to the Documentation Library and About HP Project and Portfolio Management Center page.

Accessing Documentation

To find the available documentation:

1. Log on to PPM Center.
2. From the menu bar, select **Product Information > Library**.

The Documentation Library opens.

Figure 1-5. Documentation Library page

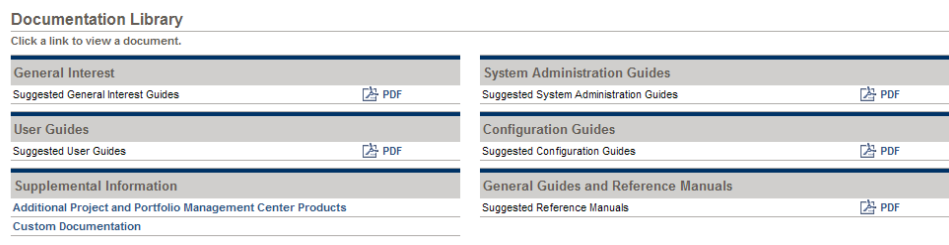


Figure 1-5 shows the Documentation Library page available when PPM Center is first installed. Each document displayed includes a list of suggested guides containing pertinent information for the selected topic area. Your system administrator can customize this page to display only the documents relevant for your organization. See *Customizing the Standard Interface* for more information about customizing your Documentation Library page.



You can also view the available documentation from the PPM Workbench. Select **Product Information > Library** from the PPM Workbench interface.

Viewing Version and User Access Information

To view the current version of the PPM Center, and to see the user access information:

1. Log on to PPM Center.
2. From the menu bar, select **Product Information > About HP Project and Portfolio Management Center**.

The About HP Project and Portfolio Management Center page opens.

About HP Project and Portfolio Management Center

Version 7.5.0
HP Project and Portfolio Management Center © 1997-2007 7,5,0,419 12/12/2007 06:20 PM
All Rights Reserved.
This program is protected by copyright law and international treaties.
Unauthorized reproduction or distribution of this program,
or any portion of it, may result in severe civil and criminal penalties,
and will be prosecuted to the maximum extent possible under the law.

User Access Information

- Configuration
- Demand Management
- Deployment Management
- Project Management
- User Administration



You can also view the current version of PPM Center and user access information from the PPM Workbench. Select **Product Information > About HP Project and Portfolio Management Center** from the PPM Workbench interface.

2 Using the Web Pages

Logging On and Off PPM Center

The set of PPM Center Web pages is accessed through a Web browser over a network. Before logging on, you must have the following:


- PPM Center Web address (URL)
- A username
- A password
- At least one PPM Center product license

Logging On to PPM Center

To log on to the PPM Center:

1. From the Web browser, enter the PPM Center Web address.

The PPM Center Logon page opens.



The screenshot shows the HP Project and Portfolio Management Center logon page. The top section features the HP logo and the text "Project and Portfolio Management Center" on a dark blue background. To the right is a photograph of a computer workstation with a monitor, keyboard, and mouse, set against a window view of a cityscape. Below this is a light gray login form with the following elements:

- Username:
- Password:
- Remember my logon
- Submit
- Clear

At the bottom right of the form, there is a copyright notice: © Copyright 1997-2008 Hewlett-Packard Development Company, L.P.

2. Enter your username and password in the appropriate fields.

To have the server retain a password, select the **Remember my logon** checkbox. Once this checkbox is selected, you don't have to enter a password each time you log on.

3. On the PPM Center Logon page, click **Submit**.

The Web pages open. First-time users might be prompted for a new password.

The screenshot displays the Project and Portfolio Management Center dashboard. The top navigation bar includes the application name and a 'SIGN OUT' button. A left-hand menu lists various management categories such as Dashboard, Demand Management, Project Management, Time Management, Resource Management, Program Management, Portfolio Management, Financial Management, Deployment Management, Reports, Administration, and Product Information. The main content area is divided into several sections:

- Request List:** A table with columns for Request No, Request Type, Description, and Request Status. It lists five requests, including application bugs, initiatives, and access issues.
- Analyze Resource Pools:** A section for resource analysis.
- Current Portfolio Map:** A bubble chart titled 'Risk' with 'Value' on the x-axis (0-100) and 'Risk' on the y-axis (0-20). The chart shows various projects represented by bubbles of different sizes and colors, corresponding to business objectives.

Request No	Request Type	Description	Request Status
30481	DEM - Application Bug	CSM app throwing exceptions on save	New
30480	DEM - Application Bug	Application missing module for new Ops division	New
30452	DEM - Application Bug	request 1	In Further Review
30256	DEM - Initiative	This initiative addresses Phase 2 of the overhaul.	New
30254	DEM - Application Bug	Cannot access Euro email groups	New

Showing 1 to 5 of 16 [Prev](#) [Next](#) [Maximize](#)

Size of bubble indicates: Budget
Color of bubble indicates: Business Objective

Risk

Value

- (No Business Objective)
- Top of the line infrastructure
- Expand to new markets
- Efficiency Across Teams
- Compliance

Logging Off PPM Center

To log off PPM Center, in the upper-right corner of the page, click **Sign Out** (see *Figure 2-1*).

Figure 2-1. Logging off PPM Center

The screenshot displays the Project and Portfolio Management Center interface. At the top right, there is a 'SIGN OUT' button. The dashboard includes a navigation menu on the left with categories like Dashboard, Demand Management, Project Management, Time Management, Resource Management, Program Management, Portfolio Management, Financial Management, Deployment Management, Reports, Administration, and Product Information. The main content area features a 'Request List' table and a 'Current Portfolio Map' bubble chart.

Request No	Request Type	Description	Request Status
30481	DEM - Application Bug	CSM app throwing exceptions on save	New
30480	DEM - Application Bug	Application missing module for new Ops division	New
30452	DEM - Application Bug	request 1	In Further Review
30256	DEM - Initiative	This initiative addresses Phase 2 of the overhaul.	New
30254	DEM - Application Bug	Cannot access Euro email groups	New

The 'Current Portfolio Map' chart shows a scatter plot of projects based on 'Value' (x-axis, 0-100) and 'Risk' (y-axis, 0-20). The legend indicates that bubble size represents Budget and bubble color represents Business Objective. The legend categories are: (No Business Objective) in blue, Efficiency Across Teams in purple, Top of the line infrastructure in green, and Compliance in orange.

Expanding and Collapsing Menus

The menu bar presents a hierarchical organization of menus, submenus and menu items. Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. Some links, like **Administration > Program Processes > Manage Issue Process**, open windows in the PPM Workbench.

You can expand all of the menus to view every menu, submenu, and menu item. You can also collapse all of the menus, leaving only the menus visible.

- To expand all of the menus to view every menu, submenu, and menu item, click the **Expand All** button at the top of the menu bar.
- To collapse all of the menus, leaving only the menus visible, click the **Collapse All** button at the top of the menu bar.

Figure 2-2 shows the location of the **Expand All** and **Collapse All** buttons.

Figure 2-2. Expand All and Collapse All buttons

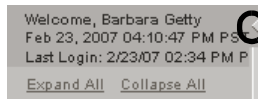


Hiding and Displaying the Menu Bar

You can hide or display the menu bar, depending upon your preference.

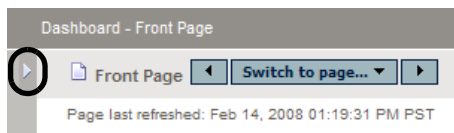
- To hide the menu bar, click the **Hide Menu Bar** icon at the top of the menu bar (see [Figure 2-3](#)).

Figure 2-3. Hiding the menu bar



- Once the menu bar is hidden, you can display the menu bar by clicking the **Display Menu Bar** icon below the HP logo (see [Figure 2-4](#)).

Figure 2-4. Displaying the menu bar



Creating Requests, Packages, and Other Entities

Entities are the requests and packages and projects and other objects you work with when using PPM Center. The entities you can create depend upon the access grants you have been given by the application administrator.

To create an entity:

1. Log on to PPM Center.
2. From the menu bar, select the appropriate product area in which you want to work.

For example, to create a new request, select **Demand Management > Create a Request**. To create a new project, select **Project Management > Projects & Tasks > Create a Project**.

The create page opens. The create page includes the fields associated with the entity type. Not all entities are alike. Some entities have a single entity type, such as budgets and skills.

Create New Budget

Budget Name:

This is a Budget for

Actuals are rolled up:

Manually. Actual costs will be entered manually in the budget.

Automatically. Both the labor and non-labor costs are rolled up from the Budget information.

Partially. The labor costs are automatically rolled up. The non-labor costs are manually entered.

The Budget to Budget comparison portlet can be used to compare planned costs of a parent budget against the planned or actual costs of its children budgets. The parent-child relationship amongst the budgets is defined here. This relationship is only used by the Budget to Budget comparison portlet. The rollup of actual values from project to program budgets is configured above.

Parent Budget for Comparison:

Will this Budget have capitalized Costs? Yes No

Region:

Start Period:

Finish Period:

Some entities have multiple entity types, such as requests. For those entities, you must select the entity type before the create page opens.

Create New Request

Request Type:


Create Based On Desired Action

Most Recently Created
Request a New Initiative
Generic Request
Report an Application Bug
Request an Application Enhancement
Submit Project Risk

Some entities, such as programs, require you to follow a process to create an entity. For those entities, you must complete the entire process to create the entity.

Create New Program

Program Name:


Program Managers: 

Description:

Benefit:

Status Notes:

Program Budget

Budget: 

Projects

Project Name	% Complete	Project Status	Sched Start	Sched Finish	Project Manager
--------------	------------	----------------	-------------	--------------	-----------------

Business Objectives

Name	State	Owner	Priority	Description
------	-------	-------	----------	-------------

Notes

New Note:

Searching for Requests, Packages, and Other Entities

Searches are used to find existing entities within PPM Center. Searching for entities does not use the PPM Center document management capabilities.

Running New Searches

To run a new search:

1. Log on to PPM Center.
2. From the menu bar, select the appropriate product area in which you want to work.

For example, to search for requests, select **Demand Management > Search Requests**. To search for a project, select **Project Management > Projects & Tasks > Search Projects**.

The Search Requests page opens. The search page includes the fields associated with the search type.

3. On the search page, fill in all the required parameters and any optional parameters and click **Search**.

The Search Results page loads, displaying the results of your search.

Using the Query Builder

The Search Requests page includes the Query Builder, which you can use to build a detailed search query within a request type using Boolean operators.

For example, you could search for all Enhancement requests whose **Description** contains the words “Release Notes” and whose **Priority** is **Critical**.

In order for the Query Builder to be available, you must provide a single value in the **Request Type** field.

To use the Query Builder:

1. Log on to PPM Center.

2. From the menu bar, select **Demand Management > Search Requests**.

The Search Requests page opens.

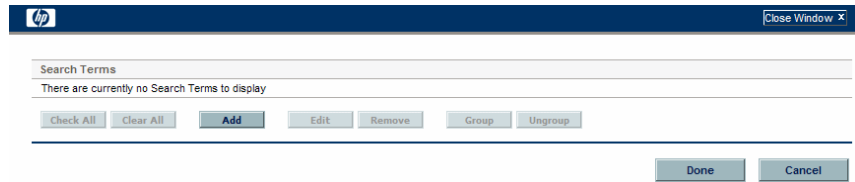
The screenshot shows the 'Search Requests' page. At the top, there is a 'View Details for Request #' field with a 'Go' button and a 'Search' button. Below this is a section titled 'Search for Requests to View' with a 'Clear Fields' link. The search criteria are organized into two columns. The left column includes fields for Request Type, Status, Assigned To, Created By, Department, Workflow, Contact, Linked Project, Creation Date (From/To), and Last Update Date (From/To). The right column includes Priority, Assigned To Group, Request Sub Type, Application, Request Group, Company Name, and Active at Workflow Step. Below these fields is a 'Request Key Words' section with a search box and a 'Query Builder' button. There are also checkboxes for 'Preventing Action On' (Requests, Packages) and radio buttons for 'Eligible for My Action?' and 'Include Closed?'. The 'Additional Filters' section contains a large empty box. Below this is a 'Sort By' section with a dropdown menu set to 'Req #' and radio buttons for 'Ascending' and 'Descending'. There are also input fields for '*Maximum Results Per Page:' (50) and '*Limit Rows Returned To:' (1000). The 'Choose Columns' section has two lists: 'Available Columns' and 'Selected Columns'. The 'Available Columns' list includes % Complete, Application, Assigned To Group, Company Name, Contact, Creation Date, Department, Last Updated, and Request Group. The 'Selected Columns' list includes Req #, Request Type, Description, Status, Assigned To, Priority, and Created By. A note states: 'Note: Columns followed by an asterisk (*) cannot be removed from the display.' At the bottom, there is a 'Save this search as:' field with a 'Save' button and a 'Manage Saved Searches' link. A 'Search' button is located at the bottom right of the page.

3. Provide a value for the **Request Type** field.

The **Query Builder** button is enabled.

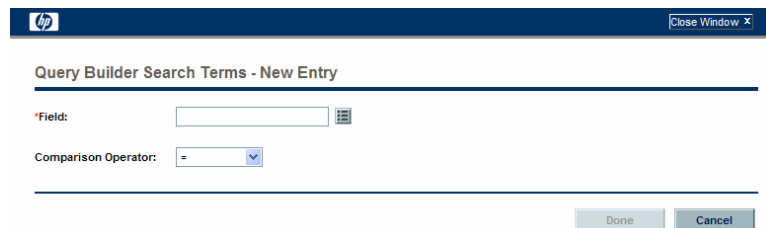
4. Click **Query Builder**.

The Query Builder Search Terms window opens.



5. Click **Add**.

The Query Builder Search Terms - New Entry window opens.



6. Specify a **Field**, a Boolean **Comparison Operator**, and the desired **Value** the field should have.



The list of available options for the **Comparison Operator** depends on the type of **Field** specified.

Value does not display until you have specified a **Field**.

7. Click **Done**.

The term is added to the Query Builder Search Terms window. Click **Add Above** or **Add Below** to add more search terms to the query. You can also group search terms by selecting the checkbox in front of each term and clicking **Group** or **Ungroup**.

8. Click **Done**.

The query is added to the **Additional Filters** section of the Search Requests page.

9. Click **Search** to run the search using the query you have built.

Saving Searches

You can save and re-run commonly run searches for requests.

To save a search:

1. Log on to PPM Center.
2. Run a search.

For instruction on how to run a search, see [Running New Searches on page 27](#). The Search Results page loads, displaying the results of your search.

The screenshot shows the 'Request Search Results' page. At the top, there are buttons for 'Export to Excel' and 'Modify Search'. Below these is a 'Save this search as:' field with a 'Save' button and a 'Manage Saved Searches' link. The main content is a table with the following data:

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
<input type="checkbox"/> 30150	Project Issue	Company shutdown directly impacts delivery timeline	New		Critical	Joseph Banks
<input type="checkbox"/> 30151	Project Issue	We need another cube for contractors expected next month	New		Normal	Joseph Banks
<input type="checkbox"/> 30063	Project Issue	New requirements for Order Processing introduced during testing	New		Critical	Admin User
<input type="checkbox"/> 30217	Project Issue	Rewrite and distribute specifications	New	Barbara Getty	Normal	Admin User
<input type="checkbox"/> 30242	Project Issue	No verification that upgrade requirements are in place. Need at least one resource for 5 working days to complete.	New	Finn Gill	High	Admin User
<input type="checkbox"/> 30218	Project Issue	Usability testing	New	Bridget Holbrook	Normal	Admin User
<input type="checkbox"/> 30030	Project Issue	Losing our Oracle Apps expert QA person	Open	Joseph Banks	Critical	Joseph Banks

At the bottom of the table, there are buttons for 'Check All', 'Clear All', and 'Delete'. The page also shows 'Showing 1 - 7 of 7' results.

3. In the **Save this search as** field, enter a name for the search and click **Save**.

A dialog window opens, displaying the results of the save.

- Click **Manage Saved Searches** to go to the Manage Your Saved Searches page. See [Managing Saved Searches](#) for more information about this page.
- Click **Return to Search Results** to return to the search results.

Running Saved Searches

To run a saved search:

1. Log on to PPM Center.
2. On the menu bar, under **Demand Management > Saved Searches > Manage Saved Searches**, click on a saved search.

The saved search is run. The Search Results page loads, displaying the results of your search.

Managing Saved Searches

You can move between saved search categories and delete saved searches.

To manage a saved search:

1. Log on to PPM Center.
2. From the menu bar, select **Demand Management > Saved Searches > Manage Saved Searches**.

The Manage Your Saved Searches page opens.

Manage Your Saved Searches

Add New Category Save

No Category

- Quick Issues
- Quick Risk

Category Name: Project Items

Save

3. Move or delete a saved search.

- To move a saved search:

- i. Select a saved search.

The **Move Arrow** and **Delete** icons for the selected saved search are enabled.

- ii. Click an enabled **Move Arrow** icon to move the saved search.

The selected saved search can move up or down in the category and move between categories.

- iii. On the Manage Your Saved Searches page, click **Save**.

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

- To delete a saved search:

- i. Select a saved search.

The **Move Arrow** and **Delete** icons for the selected saved search are enabled.

- ii. Click the enabled **Delete** icon to delete the saved search.

The selected saved search is deleted.

- iii. On the Manage Your Saved Searches page, click **Save**.

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

Managing Saved Search Categories

You can create, move, or delete saved search categories.

To manage a saved search category:

1. Log on to PPM Center.
2. From the menu bar, select **Demand Management > Saved Searches > Manage Saved Searches**.

The Manage Your Saved Searches page opens.

Manage Your Saved Searches

Add New Category Save

No Category

- Quick Issues
- Quick Risk

Category Name: Project Items

Save

3. Create, move, or delete a saved search category.
 - To create a saved search category:
 - i. On the Manage Your Saved Searches page, click **Add New Category**.

A new category section opens.
 - ii. In the **Category Name** field of the new category section, enter the name of the new category and click **Save**.

The new category is created and saved. When the category includes a saved search, the category will appear in the menu bar.

- To move a saved search category:
 - i. In a **Category** section to move, click a **Move Arrow** icon to move the category.

The **Move Arrow** icons available to a category are always enabled.
 - ii. On the Manage Your Saved Searches page, click **Save**.

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

- To delete a saved search category:
 - i. In a **Category** section to delete, click the **Delete** icon to delete the category.

When a **Delete** icon is enabled, the category can be deleted. If the **Delete** icon is not enabled, you cannot delete the category.
 - ii. On the Manage Your Saved Searches page, click **Save**.

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

Using the Request Browser

The Request Browser is another way to search for requests of a specific type. It allows you to view sets of requests hierarchically grouped by fields you specify. Each group can be expanded and easily listed by clicking on their numerical totals. *Figure 2-5* shows an example of the Request Browser's typical results.

Figure 2-5. Request Browser results


Browse PFM - Project Requests

Business Objective > Status		Total
Total		15
[-] Efficiency Across Teams		3
Design		1
In QA		1
Requirements		1
[-] <Blank>		12
Assign Project Manager		6
Business Readiness Sign-Off		3
Deploy		1
Design		1
Detailed Project Definition		1

Request Search Results (Filters: Business Objective=<Blank>, Status=Assign Project Manager) Showing 1 - 6 of 6

Project No ▾	Request Type	Description	Status	Assigned To	Priority	Created By
30301	PFM - Project		Assign Project Manager			Admin User
30271	PFM - Project	Testing the description	Assign Project Manager			Admin User
30187	PFM - Project		Assign Project Manager			Barbara Getty
30090	PFM - Project		Assign Project Manager			Carolyn Sayer
30060	PFM - Project		Assign Project Manager			Admin User
30014	PFM - Project	Internal Web Site Rollout - sales	Assign Project Manager			Carolyn Sayer

Showing 1 - 6 of 6

 [Export to Excel](#)

Access the Request Browser by selecting **Demand Management > Request Browser > Browse Requests** from the menu bar.

Figure 2-6. Request Browser search

Browse Requests

Delete Preference Set Browse Cancel

Request Browser List Configuration Clear Fields

Request Type: Advanced Search

Status: **Priority:**

Assigned To: **Assigned To Group:**

Created By: Request Sub Type:

Department: **Application:**

Workflow: **Request Group:**

Contact: **Company Name:**

Linked Project:

Creation Date From: **To:**

Last Update Date From: **To:**

Request Key Words: Search the content of Request Notes and Descriptions.

Preventing Action On: Requests **Eligible for My Action?** Yes No
 Packages **Include Closed?** Yes No

Sort By: Ascending Descending

Maximum Results Per Page: **Maximum rows at each Tree Level:**

Choose Columns for Request List

Available Columns	Selected Columns	Note
<ul style="list-style-type: none"> % Complete Application Assigned To Group Company Name Contact Creation Date Department Last Updated Req # 	<ul style="list-style-type: none"> Project No * Request Type Description Status Assigned To Priority Created By 	Note: Columns followed by an asterisk (*) cannot be removed from the display.

Request Browser Tree Configuration

Choose Additional Column to Display in Request Browser Tree

Additional Column:

Choose Fields to Group by in Request Browser Tree

Available Columns	Selected Columns	Note
<ul style="list-style-type: none"> Application Assigned To Assigned To Group Company Name Contact Created By Creation Date Department Last Updated 	<div style="border: 1px solid gray; height: 100px; width: 100%;"></div>	Note: At least 1 field needs to be selected. (Maximum 5 fields can be selected).

Save this Preference Set as: Save

Browse Cancel

Specify search criteria for the Request Browser the same way you would use the Search Requests page.



You can only specify one **Request Type** in the Request Browser.

The following Request Browser features help to organize your results:

- **Choose Columns for Request List.** When you click the numerical totals in the Request Browser's hierarchy groups, the Request Browser displays those requests below the search results. Use this section to specify any additional request fields to display as columns below the results.
- **Choose Additional Column to Display in Request Browser Tree.** Use this section to determine any additional columns to display in the Request Browser.
- **Choose Fields to Group by in Request Browser Tree.** Use this section to specify the specific request fields that will determine the hierarchy into which the search results are arranged. This list can be rearranged.
- **Save this Preference Set as.** You can save the search criteria and preference sets you have entered, similar to saving searches in the Search Requests page. These searches can be re-run later.

Running Reports

PPM Center comes with a number of ready-to-run reports. Many of these reports can also be customized to meet your specific requirements.

[For More Information](#)

For information about specific reports, see the *Reports Guide and Reference*.

Running New Reports

To run a new report:

1. Log on to PPM Center.
2. From the menu bar, select **Reports > Create a Report**.

The Submit New Report page opens.

3. Select a report.

There are two ways in which to select a report:

- In the **Recently Submitted Reports** section, select a report. The report's submission page opens.
- In the **Report Category** field, select a report category. The Submit New Report page is refreshed with the available reports. Select a report. The report's submission page opens.

Submit New Report

Recently Submitted Reports	
Project Cost Breakdown	This Report shows the costs for the Project and the Activities with which the costs are associated. Labor and Non-Labor costs are included in the totals.
Baseline Comparison Report	Compare current schedule to a Baseline or compare Baselines
Special Command Detail Report	View the configuration details of one or more special commands. Useful for debugging execution problems.
Validations Report	View the configuration details of one or more validations
Data Source Detail Report	View the configuration details of one or more Data Sources. Details all filter fields, displayed columns, query, and used by for each Data Source.

Select Report by Category

Report Category:

Baseline Comparison Report	Compare current schedule to a Baseline or compare Baselines
Project Cost Breakdown	This Report shows the costs for the Project and the Activities with which the costs are associated. Labor and Non-Labor costs are included in the totals.
Project Cost Details	View Cost Details for a Project

4. On the report's submission page, fill in all the required filter fields, any optional filter fields, and click **Submit**.

The Report Submitted page opens prior to the report.

Opening Existing Reports

Once a report is run, PPM Center saves that report, allowing you or others to view the report at a later date.

To open an existing report:

1. Log on to PPM Center.
2. From the menu bar, select **Reports > View Reports**.

The View Reports page opens. The View Reports page includes the fields associated with searching for an existing report. To view your saved reports, select **Reports > My Reports**.

3. On the View Reports page, fill in all the required filter fields and any optional filter fields, and click **Search**.

The Report Search Results page opens. All existing reports meeting the report search criteria are listed.

4. On the Report Search Results page, select the report.

The previously run report is opened.

Changing Your Settings

Using the **Administration** menu, you can adjust several interface settings to fit your own preferences. You can also change your password.

Changing Your Password

To change your password:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Edit My Profile**.

Change your password in the **Change Password** section.

Edit My Profile

Change Password

Old Password:

New Password:

Repeat New Password:

Dismiss All Messages Dialog

Warning Messages that you chose not to show again can be turned back on here.

Bring back all warning messages

Overview Page Section Preferences

Results in Maximized Overview Sections:

Project Work Plan Preferences

The number of tasks displayed per page in the project work plan can be configured here.

20 tasks per page.

100 tasks per page.

Tasks per page (max. allowed = 500).

Cost Display

I prefer to see Costs displayed in the:

Base Currency: United States Dollar (USD)

Local Currency

Done

3. In the **Change Password** section, complete the fields.
4. Click **Done**.

The new password is accepted.

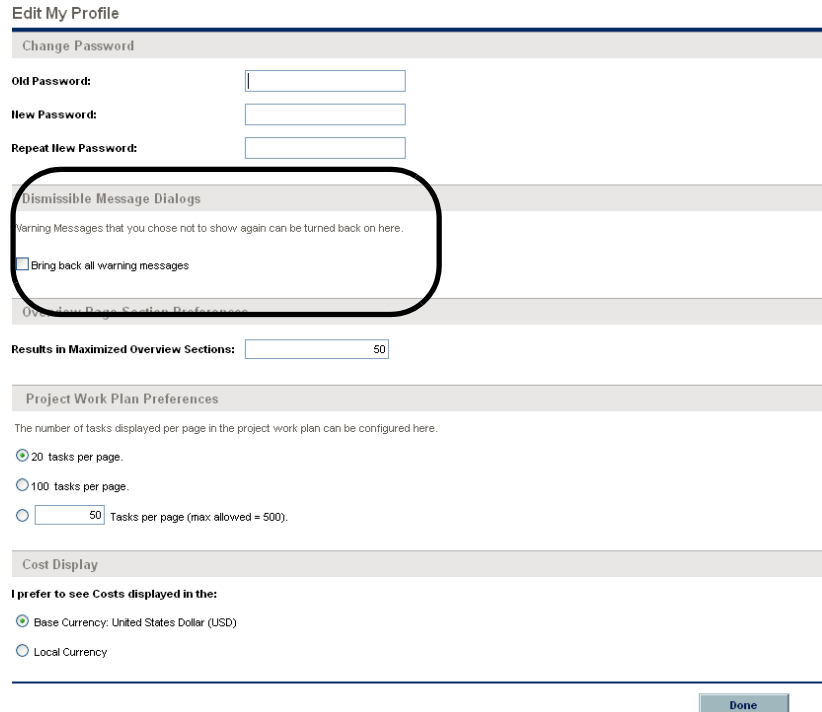
Setting Warning Message Display

As you use PPM Center, you may encounter warning messages that you can choose not to view again. You can reactivate these warning messages at any time.

To reactive warning messages:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Edit My Profile**.

Change your warning message setting in the **Dismissible Message Dialogs** section.



The screenshot shows the 'Edit My Profile' page with several sections. The 'Dismissible Message Dialogs' section is highlighted with a black oval. It contains the following text and controls:

- Dismissible Message Dialogs**
- Warning Messages that you chose not to show again can be turned back on here.
- Bring back all warning messages

Other sections visible include 'Change Password', 'Old Password', 'New Password', 'Repeat New Password', 'Results in Maximized Overview Sections' (set to 50), 'Project Work Plan Preferences' (with radio buttons for 20, 100, and 50 tasks per page), and 'Cost Display' (with radio buttons for Base Currency and Local Currency). A 'Done' button is located at the bottom right of the page.

3. In the **Dismissible Message Dialogs** section, select the **Bring back all warning messages** checkbox.
4. Click **Done**.

Warning messages will display again.

Setting Maximized Views for Portlets

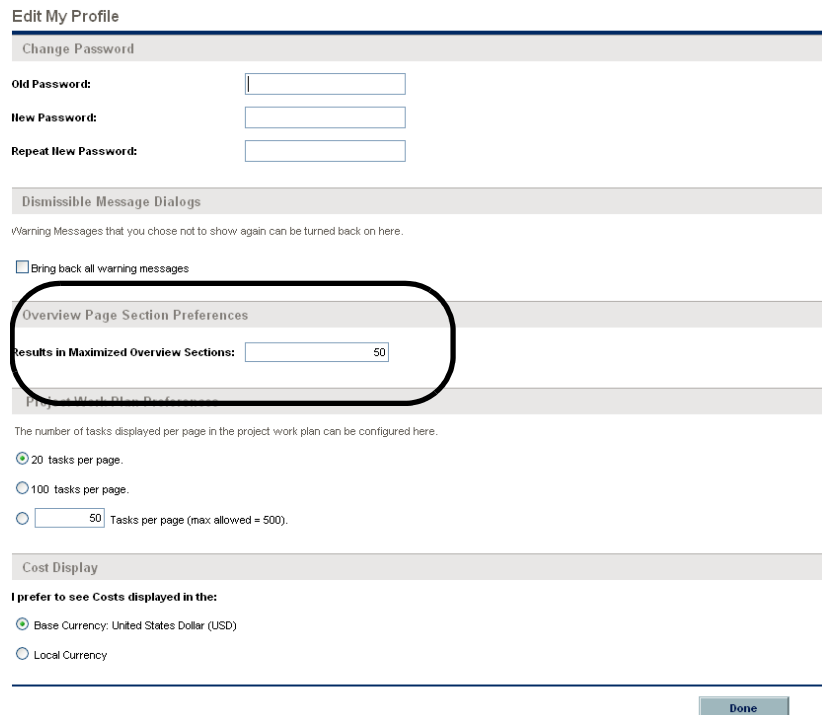
A maximized view for a portlet displays more of the data gathered from the system than in the normal view. The number of rows displayed in the maximized view can be configured to be greater than in the normal view.

▶ You can display up to 200 rows in the maximized view.

To change your portlet's maximized view setting:

1. Log on to PPM Center.
2. From the menu bar, select **Administration > Edit My Profile**.

Change your portlet maximized view setting in the **Overview Page Section Preferences** section.



Edit My Profile

Change Password

Old Password:

New Password:

Repeat New Password:

Dismissible Message Dialogs

Warning Messages that you chose not to show again can be turned back on here.

Bring back all warning messages

Overview Page Section Preferences

Results in Maximized Overview Sections:

Project Work Plan Preferences

The number of tasks displayed per page in the project work plan can be configured here.

20 tasks per page.

100 tasks per page.

Tasks per page (max. allowed = 500).

Cost Display

I prefer to see Costs displayed in the:

Base Currency: United States Dollar (USD)

Local Currency

Done

3. In the **Results in Maximized Overview Sections** field, enter the number of entries you want to see in a maximized view.
4. Click **Done**.

The new portlet maximized view setting is accepted.

Setting Work Plan Page View Preferences

HP Project Management allows you to control the number of tasks in your work plan that can be displayed at one time, allowing you to efficiently manage your work plan regardless of whether you are working on a fast local LAN or a distributed network. You can change these settings in the Edit My Profile page. For more detailed information on these specific settings, see the *HP Project Management User's Guide*.

Setting Cost Displays

HP Financial Management allows the system to display cost data in different currencies. You can change your personal cost display setting in the Edit My Profile page. For more detailed information on these specific settings, see the *HP Financial Management User's Guide*.

Using the PPM Dashboard

The PPM Dashboard collects data from the PPM Center and displays the data in real time. System data is organized using PPM Dashboard pages and portlets. Every PPM Dashboard has at least one PPM Dashboard page.

Opening PPM Dashboard Pages

Every PPM Dashboard can have one or more PPM Dashboard pages. Every PPM Dashboard page includes a label at the top of the PPM Dashboard page. To move from one PPM Dashboard page to another, click **Switch to page** and select the desired page (see *Figure 2-7*). You can click the arrow icons to either side of **Switch to page** to move through PPM Dashboard pages sequentially.

Figure 2-7. Buttons for switching between PPM Dashboard pages



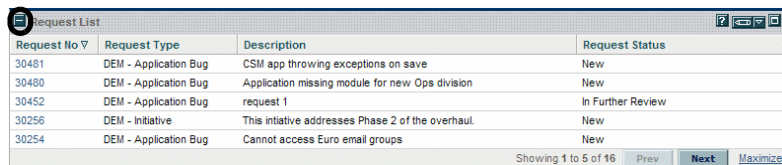
Also, from the menu bar, you can select **Dashboard** and select the desired page.

Setting Portlet Views

Portlets can be set to one of the following views:

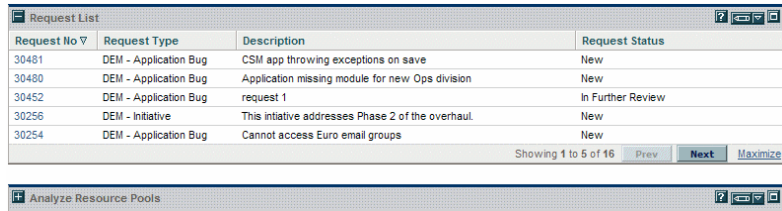
- **Minimize view.** Only the portlet's title bar is visible. A portlet retains a minimized view between PPM Center sessions. To minimize a portlet, in the portlet's normal view, click the **Minimize** icon to the left of the portlet name in the title bar (see *Figure 2-8*).

Figure 2-8. Portlet minimize icon



- **Normal view.** The default view of the portlet. For list portlets, the default rows and columns are visible in the portlet. For chart portlets, the chart or graph is visible. A portlet retains a normal view between PPM Center sessions. To return a minimized portlet to the normal view, in the portlet's minimized view, click the **Normal** icon (see *Figure 2-9*).

Figure 2-9. Normal and minimized views of portlets



Request No	Request Type	Description	Request Status
30481	DEM - Application Bug	CSM app throwing exceptions on save	New
30480	DEM - Application Bug	Application missing module for new Ops division	New
30452	DEM - Application Bug	request 1	In Further Review
30256	DEM - Initiative	This initiative addresses Phase 2 of the overhaul.	New
30254	DEM - Application Bug	Cannot access Euro email groups	New

Showing 1 to 5 of 16 Prev Next Maximize

Analyze Resource Pools

- Maximize view.** A maximized view of a portlet opens in a new page. A maximized view of a portlet contains more rows and columns than a portlet in a normal view. Maximized views of portlets are not retained between PPM Center sessions. To see a portlet's maximized view, in the portlet's normal view, click the **Maximize** icon (see *Figure 2-10*). To return a maximized view portlet to the normal view, in the portlet's maximized view, click **Back** (see *Figure 2-11*).

Figure 2-10. Portlet maximize icons

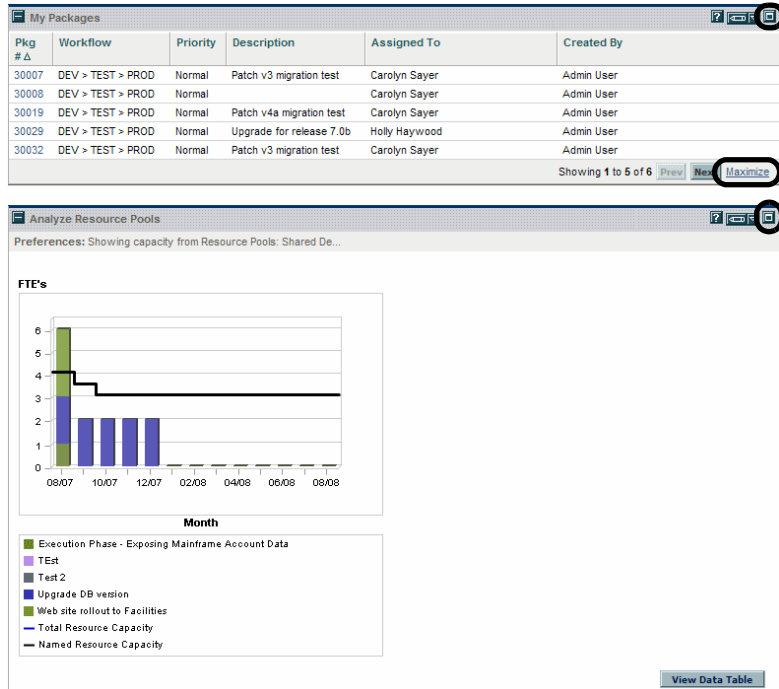


Figure 2-11. Portlet maximized view

Maximized View Back

My 2007 Proposals in Progress Showing 1 to 15 of 15 Prev Next

Proposal No	Proposal Name	Business Unit	Status	Return on Investment	Total Score	Value Rating	Risk Rating
30006	Build new data center	Corporate	High-Level Business Case	171000	31	46	15
30009	CIO's pet project	Corporate	ITSC Review	150000	40	60	20
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36	46	10
30007	Expand to China	Corporate	High-Level Business Case	154000	28	39	11
30008	Expand to Europe	Corporate	High-Level Business Case	163000	64	72	8
30004	Implement IT Governance	Corporate	High-Level Business Case	176000	110	110	0
30005	Implement paperless office	Corporate	High-Level Business Case	-11000	18	37	19
30061	Mainframe Data Availability	Corporate	Detailed Business Case	-405920	19	19	0
30002	Maintain CRM	Corporate	High-Level Business Case	61000	31	51	20
30013	Maintain SOX compliance	Corporate	High-Level Business Case	47000	-5	0	5
30010	Overhaul VPN	Corporate	High-Level Business Case	40000	54	67	13
30003	Streamline supply chain	Corporate	High-Level Business Case	144000	37	57	20
30001	Upgrade DB version	Corporate	High-Level Business Case	-477999.9996	36	52	16
30017	Web site rollout to Facilities	Corporate	ITSC Review	-68640	16	17	1
30011	Wireless access for customers	Corporate	High-Level Business Case	120000	22	35	13

Export to Excel Showing 1 to 15 of 15 Prev Next

Arranging Data in List Portlets

For list portlets, you can personalize the data gathered and the way the data is presented, using the portlet's edit page. However, you can temporarily change the way the data is presented using the portlet's **Sort** icon (see [Figure 2-12](#)).

- To move the **Sort** icon from column to column, click on a column's heading. The **Sort** icon will move to that column. The data displayed in the portlet will then be sorted by that column.


Once you have selected the sort column, you can then select the order of the sort. When the **Sort** icon points up, the data is sorted in alphanumeric order from lowest (0 or A) at the top to highest (9 or Z) on the bottom. When the **Sort** icon points down, the data is sorted in alphanumeric order from highest (9 or Z) at the top to lowest (0 or A) on the bottom.

- To change the order of the sort, click a column heading containing the **Sort** icon. The **Sort** icon toggles from pointing up to pointing down, or from pointing down to pointing up.



Using the portlet's **Sort** icon to change the presentation of the data is valid only during the current PPM Center session.

Figure 2-12. Sort icon

Proposal No	Proposal Name 	Business Unit	Status	Return on Investment	Total Score
30006	Build new data center	Corporate	High-Level Business Case	171000	31
30009	CIO's pet project	Corporate	ITSC Review	150000	40
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36
30007	Expand to China	Corporate	High-Level Business Case	154000	28
30008	Expand to Europe	Corporate	High-Level Business Case	163000	64

Showing 1 to 5 of 15 [Prev](#) [Next](#) [Maximize](#)

Drilling Down from Portlets

Drill-down pages contain additional, detailed or background information concerning a linked entry. Some drill-down pages contain portlets, which have their own linked entries and their own drill-down pages.

- To drill down from a list portlet, click on a linked entry.

Figure 2-13. Drilling down from a list portlet

The screenshot shows a web application interface. At the top, a window titled "My 2007 Proposals in Progress" contains a table with the following data:

Proposal No	Proposal Name	Business Unit	Status	Return on Investment	Total Score
30006	Buld new data center	Corporate	High-Level Business Case	171000	31
30009	CIO's pet project	Corporate	ITSC Review	150000	40
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36
30007	Expand to China	Corporate	High-Level Business Case	154000	28
30008	Expand to Europe	Corporate	High-Level Business Case	163000	64

Below the table, it says "Showing 1 to 5 of 15" with "Prev", "Next", and "Maximize" buttons. A black line connects the "CIO's pet project" entry in the table to the detailed view below.

The detailed view is titled "PFM - Proposal - #30009". It includes a "Printable Version" link and "Result 2 of 15".

Description: CIO's pet project
Request Status: ITSC Review ([View Full Status Below](#))
No Available Actions

Make a Copy

Expand All **Collapse All** **Save**

Header
Summary

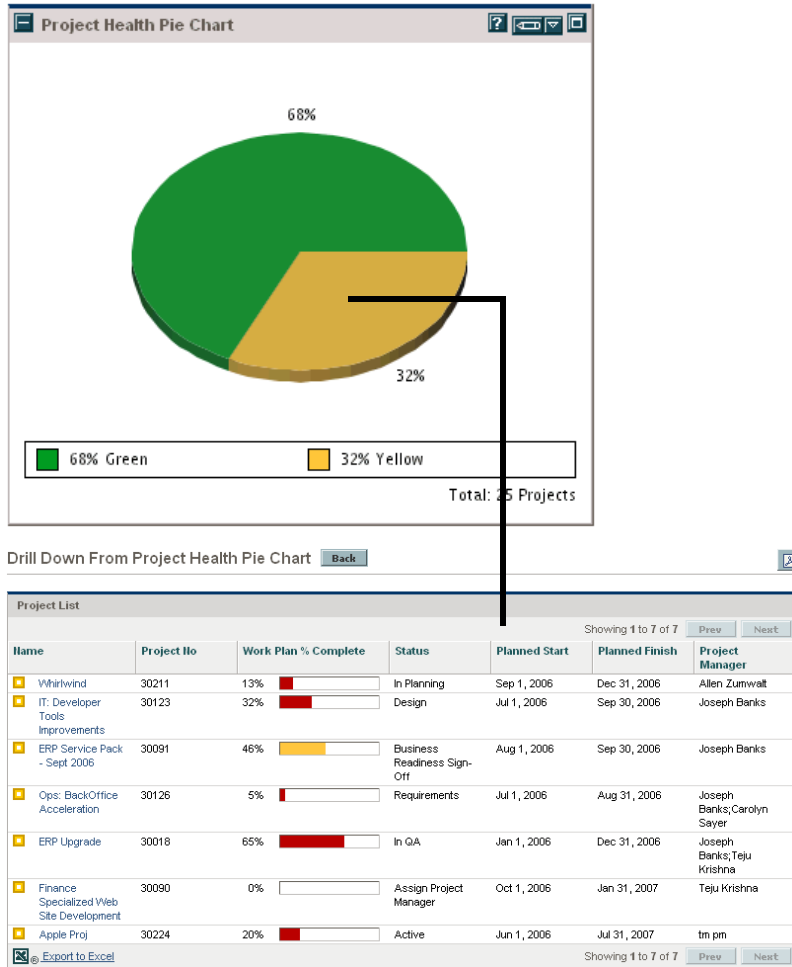
Proposal No.: 30009 **Created By:** Barbara Getty
Driving Process: PFM - Proposal
Business Unit: Corporate **Status:** ITSC Review
Description: CIO's pet project
Request Type: PFM - Proposal
Project Type: **Region:**
Proposal Dependencies:

Details
Notes: No Notes Exist
Status
References

Make a Copy **Save**

- To drill down from a chart portlet, click on a segment of the graph or legend.

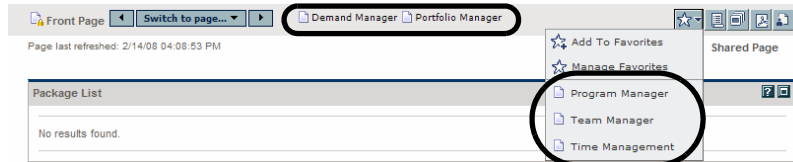
Figure 2-14. Drilling down from a chart portlet



Maintaining a Favorite Page List

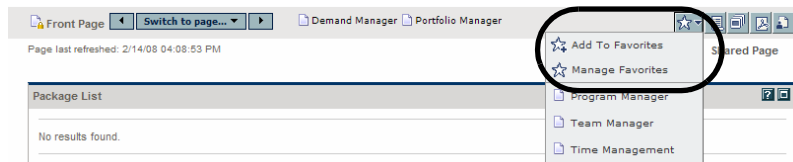
If you have created many personalized PPM Dashboard pages and access some pages more than others, you can create a Favorites list. Like the Favorites list of a Web browser, you can create a list of links to your most accessed PPM Dashboard pages. Unlike the Favorites list of a Web browser, the list starts across the top of the PPM Dashboard page and extends into a drop-down list.

Figure 2-15. Favorite page list



By clicking the **Favorites** icon, you can choose to add the current PPM Dashboard page to your Favorites list or to manage your Favorites list (from the Manage Favorites dialog).

Figure 2-16. Favorites icon and drop-down menu



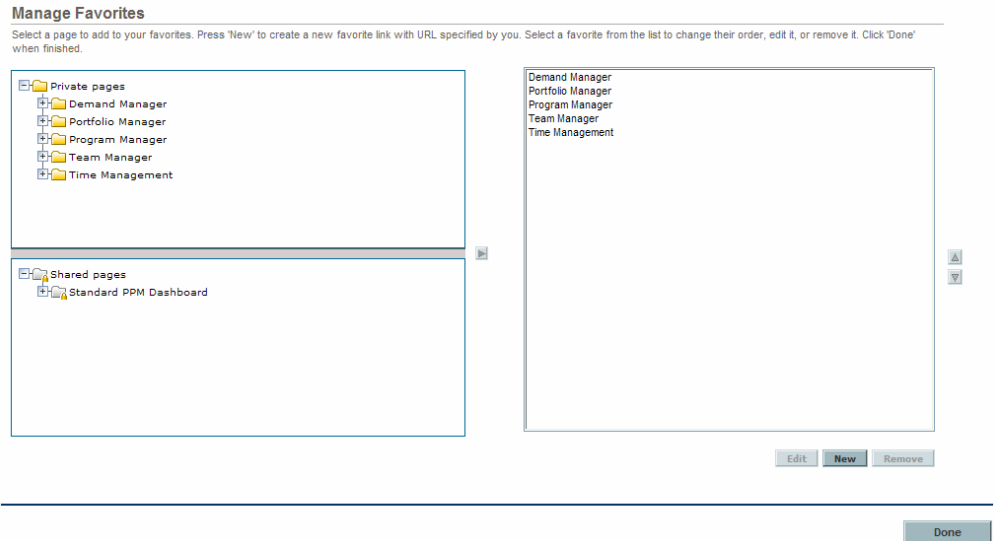
Adding to Your Favorites

You can add a PPM Dashboard page or URL to your Favorites list.

- To add the PPM Dashboard page you are currently viewing, click the **Favorites** icon and select **Add to Favorites**. The page is appended to your Favorites list.

- To add one or more PPM Dashboard pages to your Favorites list,
 - a. Click the **Favorites** icon and select **Manage Favorites**.

The Manage Favorites dialog opens.



- b. On the left side of the dialog, select the page to add and click the **Add** icon (↕, in the middle of the dialog between the two panes). The selected page appears in the list on the right side of the dialog.

Repeat this step until you have added all the pages you want add.

- c. Click **Done**.

- To add a link to a URL to your Favorites list,
 - a. Click the **Favorites** icon and select Manage Favorites. The Manage Favorites dialog opens.
 - b. Click **New**.

The New Favorite dialog opens.

New Favorite

Insert title and valid URL (use "http://" if possible) to create a new favorite link. Click "done" to save and close, or "cancel" to close this dialog without saving. Description is optional.

*Favorite Title:

*Favorite URL:

Favorite Description:

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

Field Name (*Required)	Description
*Favorite Title	Specify a name for the favorite. The name is displayed in the Favorites list. Type any alphanumeric string.
*Favorite URL	Specify the URL to which to link.
Favorite Description	Specify the favorite definition. The definition is displayed as a tool tip when the cursor rolls over the link (only when the link appears at the top of the PPM Dashboard page, not in the drop-down list).

- d. Click **Done**.
- e. Repeat [step b](#) through [step d](#) for each URL you want to add.
- f. Click **Done**.

Managing Your Favorites

You can manage your Favorites list by sorting the order of the list, editing the title and description of an existing PPM Dashboard page, or editing the title, URL, or description of an existing URL link.

Links listed at the top of your Favorites list are easier and quicker to access. They either appear at the top of the PPM Dashboard page or at the top of the drop-down list. You may want to move your most frequently accessed pages to the top of your Favorites list.

To sort the order of your Favorites list, do the following:

1. Click the **Favorites** icon and select **Manage Favorites**. The Manage Favorite dialog opens.
2. Select a favorite to move and click on the **Move Arrow** icons (located on the right side of the dialog).

Repeat this step until you have sorted your favorites to your desired order.

3. Click **Done**.

To edit a favorite, do the following:

1. Click the **Favorites** icon and select **Manage Favorites**. The Manage Favorite dialog opens.
2. Select a favorite to edit and click **Edit**.

The Edit Favorite dialog opens.

Edit Favorite

Change favorite's details. Edit URL not available in links for Dashboard Pages, only user generated links.

*Favorite Title:

Favorite Description:

3. Edit the title or description of a PPM Dashboard page or the title, URL, or description of a URL link.

4. Click **Done**.
5. Repeat **step 2** through **step 4** for any favorite you want to edit.
6. Click **Done**.

Exporting Data to Excel Spreadsheets

Data on a list portlet's *maximized* page can be exported to an Excel spreadsheet. You must have Microsoft® Excel installed on your system to view the data.


To export data to an Excel spreadsheet, click the **Export Data to Excel** icon. A browser page is opened and the data is displayed in a Microsoft Excel spreadsheet. Once the data is imported into Microsoft Excel, all the standard Excel functions are available, including saving the file.

Figure 2-17. Exporting data to Excel

Maximized View Back 

My 2007 Proposals in Progress Showing 1 to 15 of 15 Prev Next

Proposal No	Proposal Name	Business Unit	Status	Return on Investment	Total Score	Value Rating	Risk Rating
30006	Build new data center	Corporate	High-Level Business Case	171000	31	46	15
30009	CIO's pet project	Corporate	ITSC Review	150000	40	60	20
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36	46	10
30007	Expand to China	Corporate	High-Level Business Case	154000	28	39	11
30008	Expand to Europe	Corporate	High-Level Business Case	163000	64	72	8
30004	Implement IT Governance	Corporate	High-Level Business Case	176000	110	110	0
30005	Implement paperless office	Corporate	High-Level Business Case	-11000	18	37	19
30061	Mainframe Data Availability	Corporate	Detailed Business Case	-405920	19	19	0
30002	Maintain CRM	Corporate	High-Level Business Case	61000	31	51	20
30013	Maintain SOX compliance	Corporate	High-Level Business Case	47000	-5	0	5
30010	Overhaul VPN	Corporate	High-Level Business Case	40000	54	67	13
30003	Streamline supply chain	Corporate	High-Level Business Case	144000	37	57	20
30001	Upgrade DB version	Corporate	High-Level Business Case	-477999.9996	36	52	16
30017	Web site rollout to Facilities	Corporate	ITSC Review	-68640	16	17	1
30011	Wireless access for customers	Corporate	High-Level Business Case	120000	22	35	13

 Export to Excel Showing 1 to 15 of 15 Prev Next



If you are having problems with the data in the spreadsheet, you may need to configure the Internet options of your Web browser. See the *HP Project Management User's Guide* for more information.

About Excel Exports

Data from a list portlet's maximized page is exported as-is. Excel translates the data into the various formats with a few exceptions. The following is a list of those exceptions:

- Red, yellow, and green indicators translate into a shaded cell with a white **R**, **Y**, or **G** letter.
- Task exception indicators translate into a red exclamation mark.
- Milestone indicators translate into a black diamond character.
- Status bars export with the percentage number plus a percent (%) character.
- Currency values export with the currency sign, commas, and periods.
- Links to URLs export, but are altered to open in a new Web browser page (instead of the current Web browser page).

Cycling Through PPM Dashboard Pages Automatically

You can set the PPM Dashboard to automatically display all the pages in the **Dashboard** list one by one in a timed cycle. You can also set whether the pages cycle within the standard web pages, or take up the entire screen.

To set the PPM Dashboard to rotate through all its pages cyclically:

1. Log on to PPM Center.
2. In the upper right-hand corner of the page, click the **Page Rotation** icon.

The Page Rotation dialog box opens.

3. Select the desired options for the following settings:
 - Time interval
 - Whether to display using the full screen
4. Click **Start**.

The PPM Dashboard will begin displaying its pages one by one according to the specified timed cycle.

Exporting PPM Dashboard Pages to PDF Files

PPM Dashboard pages can be exported as PDF files for use in presentations.

To export a PPM Dashboard page to a PDF file:

1. Open the PPM Dashboard page to export.
2. In the upper right-hand corner of the page, click the **Export Dashboard page to PDF** icon.

The PDF Settings window opens.

3. Select the desired options for the following settings:
 - Display of the PPM Dashboard page
 - Portlets to export
 - Comments (appear at the top of the page)
 - Paper size
 - Whether to open the PDF file in a browser window
 - Whether to leave the PDF Settings window open
4. Click **Export**.

The PPM Dashboard page is exported to a PDF file that can be viewed and saved separately.



You can also export a maximized view of a portlet to a PDF file.

Viewing Module Comments

If a PPM Dashboard page is shared (the module's administrator has configured access for all users), you can view comments from the administrator about the module.

To view comments, from the shared page, click the **View Module Comments** icon. A list of all comments written by the module's administrator is displayed.

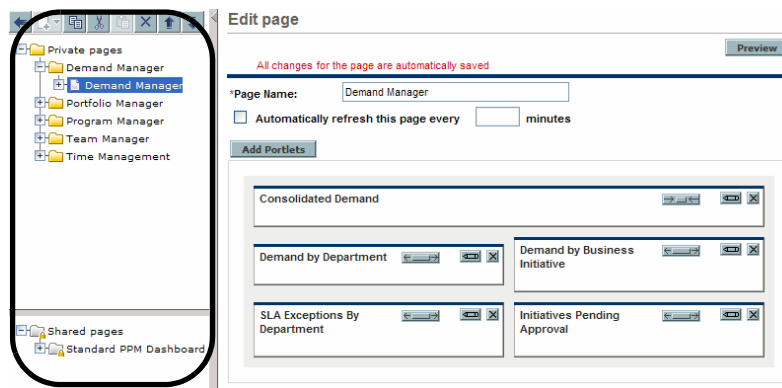
Personalizing the PPM Dashboard

Personalizing the PPM Dashboard refers to making changes to your PPM Dashboard and PPM Dashboard pages. To personalize the PPM Dashboard, you can do the following:

- Add PPM Dashboard pages
- Move, rename, and delete PPM Dashboard pages
- Set the refresh rate for PPM Dashboard pages
- Add portlets to PPM Dashboard pages
- Copy and move portlets on PPM Dashboard pages
- Preview PPM Dashboard pages
- Add groups of PPM Dashboard pages

You can personalize your PPM Dashboard using the Personalize Dashboard page. Most actions on the Personalize Dashboard page are performed in the area to the right of the menu bar, which can be collapsed or expanded.

Figure 2-18. Personalize PPM Dashboard page



The area to the right of the menu bar displays the PPM Dashboard pages currently being used, split into the following major categories:

- **Private pages.** These are PPM Dashboard pages you have created.
- **Shared pages.** These are PPM Dashboard pages that have been created by your application administrator and made available for you to use.

Adding PPM Dashboard Pages

When adding PPM Dashboard pages, you can add:

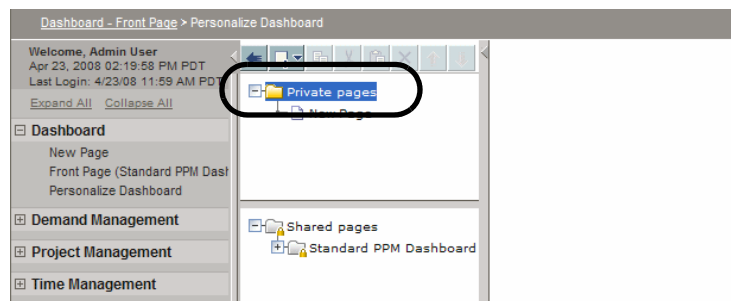
- Blank PPM Dashboard pages
- Preconfigured PPM Dashboard pages

To add a PPM Dashboard page:

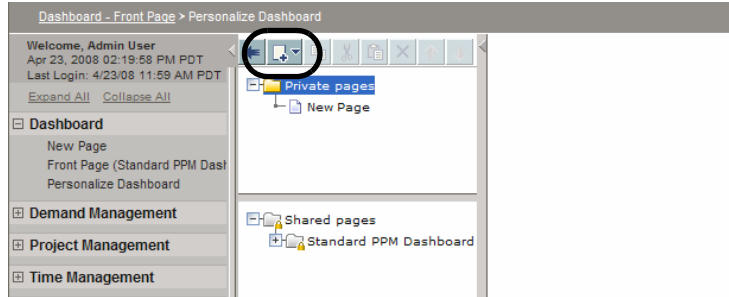
1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**

The Personalize Dashboard page opens.

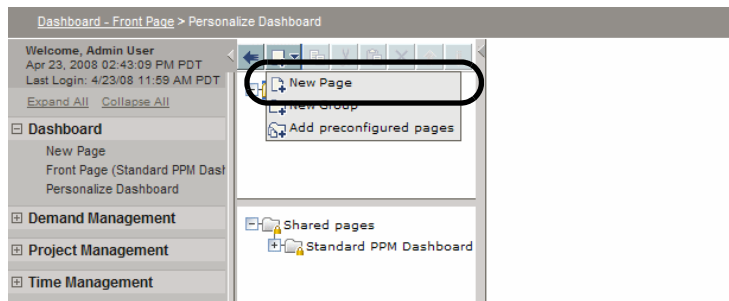
3. Add a PPM Dashboard page.
 - To add a blank PPM Dashboard page:
 - i. Select **Private pages** in the area to the right of the menu bar.



ii. Click the **Add New** icon.

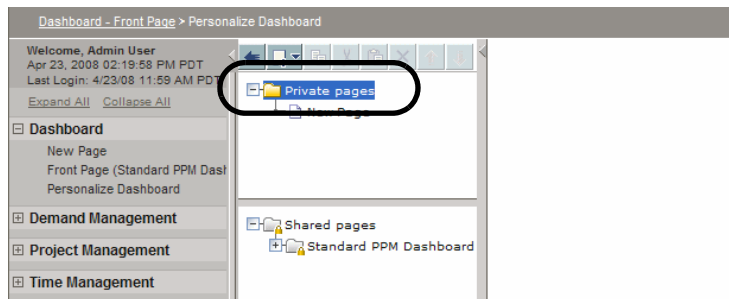


iii. Select **New Page**.

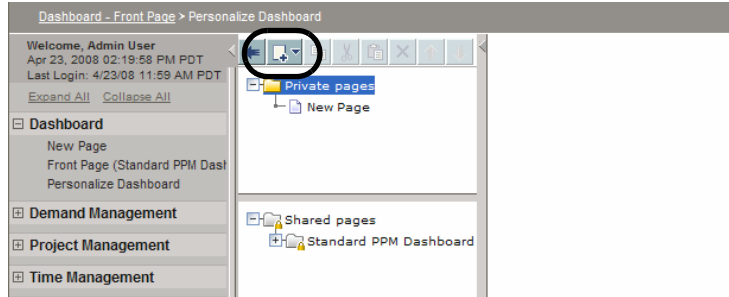


A blank PPM Dashboard page is added to your PPM Dashboard.

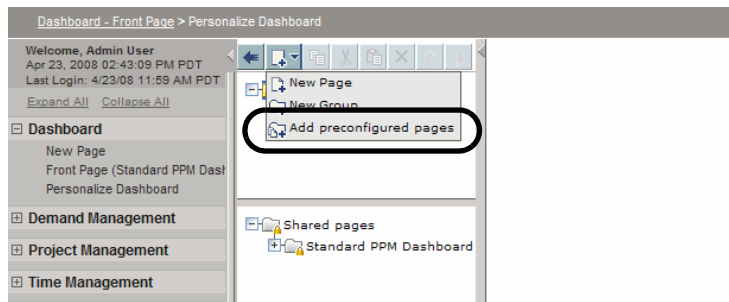
- To add a preconfigured PPM Dashboard page:
 - i. Select **Private pages** in the area to the right of the menu bar.



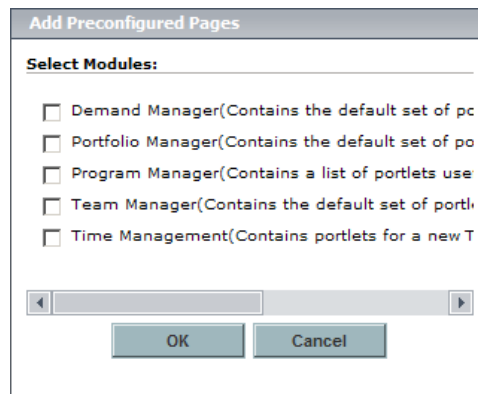
ii. Click the **Add New** icon.



iii. Select **Add Preconfigured Pages**.



A list of available preconfigured PPM Dashboard pages is displayed.



iv. Select a preconfigured PPM Dashboard page or pages and click **OK**. The page is added to your PPM Dashboard.

The changes to your PPM Dashboard are automatically saved.

Copying, Moving, and Deleting PPM Dashboard Pages

To copy, move, or delete a PPM Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.

The Personalize Dashboard page opens.

3. In the area to the right of the menu bar, select the PPM Dashboard page you want to copy, move, or delete.

The **Copy** icon, available **Move Arrow** icons, and **Delete** icon are enabled in the area to the right of the menu bar for the PPM Dashboard page.

4. Copy, move, or delete the PPM Dashboard page.
 - To copy the PPM Dashboard page, click the **Copy** icon. The PPM Dashboard page is copied.
 - To move the PPM Dashboard page up or down in the list, click one of the enabled **Move Arrow** icons. The PPM Dashboard page is moved.
 - To delete the PPM Dashboard page, click the **Delete** icon. The PPM Dashboard page is removed.

The changes to your PPM Dashboard are automatically saved.

Renaming PPM Dashboard Pages

To rename a PPM Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to rename.

The selected PPM Dashboard page is displayed in the Edit page.

4. In the Edit page, in the **Page Name** field, enter the new name of the PPM Dashboard page.

Edit page

[Preview](#)

Page Name:

Automatically refresh this page every minutes

[Add Portlets](#)

My Tasks ↔ ⏪ ⏩ ✕

Program Project List ↔ ⏪ ⏩ ✕ Summary Task List ↔ ⏪ ⏩ ✕

Project Gantt ↔ ⏪ ⏩ ✕

Project Health Pie Chart ↔ ⏪ ⏩ ✕ Project List ↔ ⏪ ⏩ ✕

Resource Gantt ↔ ⏪ ⏩ ✕

Analyze Assignment Load ↔ ⏪ ⏩ ✕

The changes to your PPM Dashboard are automatically saved.

Setting Refresh Rates for PPM Dashboard Pages

To set the refresh rate for a PPM Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure.

The selected PPM Dashboard page is displayed in the Edit page.

4. In the **Automatically refresh this page every minutes** field, select the checkbox and enter the number of minutes.

The number entered in the field must be a whole number.

Edit page

Preview

Page Name: Project Portlets

Automatically refresh this page every minutes

Add Portlets

My Tasks

Program Project List Summary Task List

Project Gantt

Project Health Pie Chart Project List

Resource Gantt

Analyze Assignment Load

The changes to your PPM Dashboard are automatically saved.

Adding Portlets to PPM Dashboard Pages

Portlets can be added to PPM Dashboard pages in two ways:

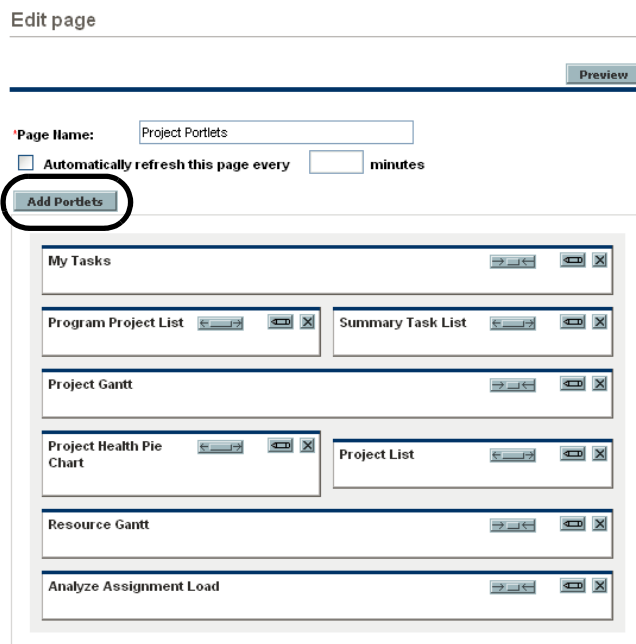
- Using the Personalize Dashboard page or
- Using the **Add Portlets** icon from a specific PPM Dashboard page.

To add portlets:

1. Log on to PPM Center.
2. Select a method to add a portlet.
 - To use the Personalize Dashboard page to add a portlet:
 - i. From the menu bar, select **Dashboard > Personalize Dashboard**.
 - ii. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure.

The selected PPM Dashboard page is displayed in the Edit page.

- iii. On the Edit page, click **Add Portlets**.



The Add Portlets to Dashboard Page opens.

- To add portlets directly from a PPM Dashboard page:
 - i. From the menu bar, select **Dashboard > <Dashboard_Page>**.
 - ii. Click the **Add Portlets** icon (located in the upper-right corner of the PPM Dashboard page).



The Add Portlets to Dashboard Page opens.

3. Search for the portlets to add.
 - To list all of the portlets, click **Find Portlets**. The **Select Portlets to Add** section is added to the Add Portlets to Dashboard Page. The **Select Portlets to Add** section lists all of 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 Add Portlets to Dashboard Page. The **Select Portlets to Add** section lists all of the portlets matching the search criteria.

4. In the **Select Portlets to Add** section, select one or more portlets and click **Add**.

The selected portlets are added to the PPM Dashboard page. The changes to your PPM Dashboard are automatically saved.

Moving Portlets on PPM Dashboard Pages

You can either drag and drop or copy and paste portlets. To move portlets:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure.

The selected PPM Dashboard page is displayed in the Personalize Dashboard page.

4. Select the portlet you want to move.

The portlet is highlighted.

5. Move the portlet.
 - Drag and drop the portlet to move it around on the same PPM Dashboard page. Hold the cursor down on the portlet and move the portlet to its new location.
 - Copy and paste the portlet to move it to another PPM Dashboard page. Select the portlet in the area to the right of the menu bar and click the **Copy** icon. Then, select the destination page in the area to the right of the menu bar and click the **Paste** icon.

The changes to your PPM Dashboard are automatically saved.

Previewing PPM Dashboard Pages

You can preview a PPM Dashboard page during the personalization process, allowing you to view the PPM Dashboard page and its portlets as they would appear during normal usage with their filters operating as you configured them. To preview a PPM Dashboard page, click **Preview** in the Edit page. A new window opens, displaying the portlets in their current arrangement.

Working with Groups

You can arrange PPM Dashboard pages into groups for easy categorization. These groups can be expanded and collapsed in the menu bar.

To add a new group to the list of PPM Dashboard pages:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. In the area to the right of the menu bar, select **Private pages**.
4. Click the **Add New** icon.
5. Select **New Group**.

A new group page is added to your list of PPM Dashboard pages, and the Edit Group page opens.

6. In the **Group Name** field, enter a name for the new group.

The group name will update automatically in the list of PPM Dashboard pages after you click away from the field.

7. Add new pages to the group as described in *Adding PPM Dashboard Pages* on page 59.



You can reorder PPM Dashboard pages within groups and you can copy a PPM Dashboard page and paste it into another group. However, you cannot drag and drop a PPM Dashboard page from one group to another.

Personalizing Portlets

Personalizing portlets refers to making changes to your portlets. This includes the following:

- Deleting portlets
- Changing the size of portlets
- Setting the content and display of portlets

Deleting Portlets

Portlets can be deleted from PPM Dashboard pages in two ways:

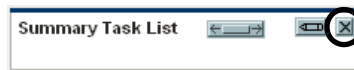
- Using the Personalize Dashboard page
- Using the **Delete** menu bar selection from a specific PPM Dashboard page

To delete portlets using the Personalize Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure and click the **Edit** icon.

The selected PPM Dashboard page is displayed in the Personalize Dashboard page.

4. On the portlet you want to delete, click the **Delete** icon.

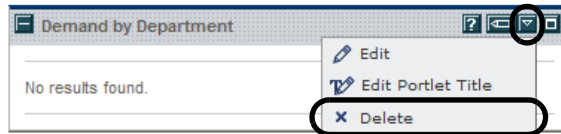


The portlet is deleted.

The changes to your PPM Dashboard are automatically saved.

To delete a portlet directly from a PPM Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > <Dashboard_Page>**.
3. On the portlet you want to delete, click the **Pulldown** icon and then the **Delete** menu item.



The portlet is deleted.

The changes to your PPM Dashboard are automatically saved.

Changing the Size of Portlets

Portlets come in two sizes:

- **Wide.** One portlet per row.
- **Narrow.** Two portlets per row.

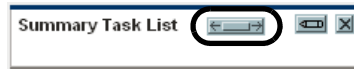
To change the width of portlets:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure and click the **Edit** icon.

The selected PPM Dashboard page is displayed in the Personalize Dashboard page.

4. Change the size of the portlet.

- On narrow portlets, click the **Portlet Wide** icon.



- On wide portlets, click the **Portlet Narrow** icon.



The changes to your PPM Dashboard are automatically saved.

Configuring Portlets

You can configure your portlets, both in terms of data content and in terms of the display of the data. Use a portlet's edit page to personalize a portlet to best fit your business needs.

To configure a portlet:

1. Log on to PPM Center.

2. On the portlet, click the **Edit** icon.

The portlet's edit page displays.

Edit Preferences: Project Health Pie Chart (Project Health Pie Chart)

Preferences

Specific Projects:

Projects matching criteria:

Project Manager:

Status:

Include Finished Projects

Project Type:

Program:

Region:

*Project Health:

No Health

3. Personalize your portlet.

Each portlet is unique. All portlets have a portlet edit page but not all portlets have all of the listed sections. For example, chart portlets do not have a **Choose Display Columns** section. The following lists the different ways you can personalize your portlet:

- **Title.** You can change the name of the portlet. Click **Change Title** to open the Change Title page. You can also select the **Edit Portlet Title** menu item directly from a PPM Dashboard page.
- **Preferences.** You can configure the filters that are used to capture and display the data you want. Select the filters that best fit your business need.
- **Choose display columns.** You can configure how to display the data in the portlet. The **Available Columns** field lists all of the columns available to be displayed but not chosen. The **Displayed Columns** field lists all columns that will be displayed in the portlet's normal view. The

Additional Columns Displayed in Maximize View field lists the additional columns that will be displayed in the portlet's maximized view. To move entries between fields, select an entry and click one of the enabled **Move Arrow** icons.

- **Display options.** You can configure how to display the data. Select the options that best suit your business need.
- **Arrange data.** You can configure how to display the data. Select the options that best suit your business need.

4. In the portlet edit page, click **Done**.

The changes to the portlet are saved.

Using the Query Builder for Portlets

Request-related portlets include the Query Builder, which allows you to build a detailed search query within a request type using Boolean operators.

For example, you could search for all Enhancement requests whose **Description** contains the words “Release Notes” and whose **Priority** is **Critical**.

For more details on using the Query Builder, see [Using the Query Builder on page 27](#).

3 Using the PPM Workbench

Opening and Closing the PPM Workbench

The PPM Workbench is accessed from PPM Center using the menu bar or from your desktop (after creating shortcuts).



If you have a pop-up blocker or download blocker active on your Web browser, you may have difficulties opening the PPM Workbench.

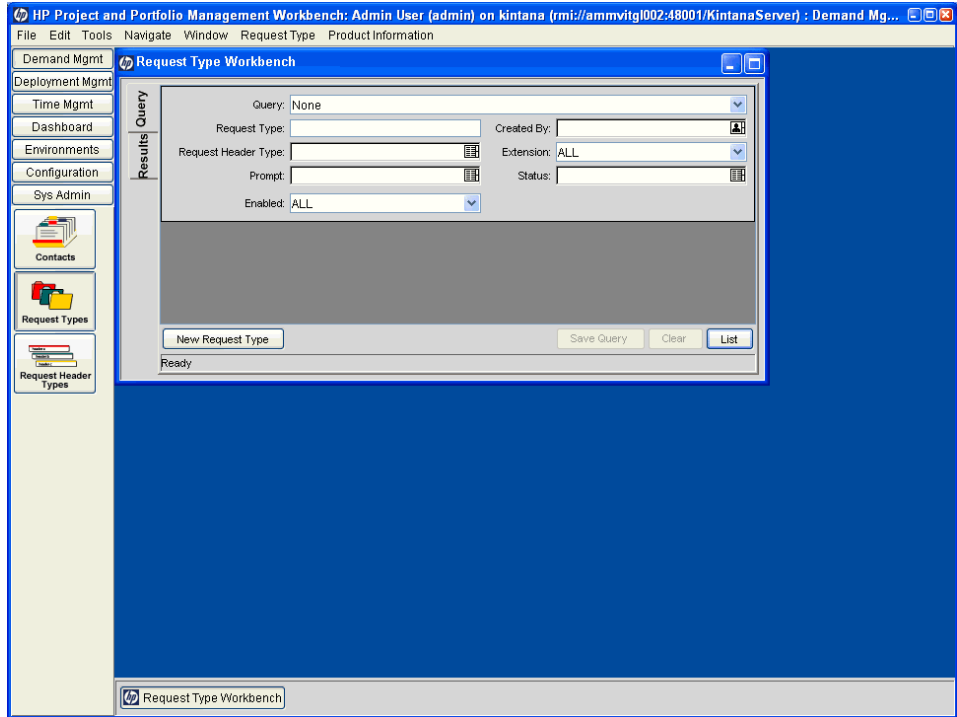
Opening PPM Workbench from PPM Center

To open the PPM Workbench from PPM Center:

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

A PPM Workbench window opens. (If a Warning Security window opens, select **Yes**.)

The PPM Workbench opens.



Opening PPM Workbench from the Desktop (Initial Installation)

To open the PPM Workbench from your desktop (for the first time):

1. Create desktop and Start menu shortcuts:
 - a. Log on to PPM Center.
 - b. From the menu bar, select **Administration > Open Workbench on Desktop**.
 - c. Click **Yes** when prompted to create shortcuts to the PPM Workbench. If you have already created the shortcuts, continue to [step 2](#).



You can remove PPM Workbench from your desktop using the system's standard Add/Remove Programs utility.

2. Enter your username and password in the appropriate fields.
3. Click Logon.

The PPM Workbench opens.

Opening PPM Workbench from the Desktop

To open the PPM Workbench from your desktop:

1. Double-click the **HP Project and Portfolio Management** desktop icon or select **Start > All Programs > HP > HP Project and Portfolio Management**.

The PPM Workbench opens.

Closing PPM Workbench

To close the PPM Workbench:

1. From the PPM Workbench menu, select **File > Exit**.

The PPM Workbench closes.

Searching for Entities

The PPM Workbench opens the default configuration entity Workbench window. A configuration entity Workbench window gives you an interface to search for a specific entity, such as the Enhancement request type. To search for an entity, enter criteria in any combination of the fields in the Query tab and click **List**. All entities matching the search criteria will be listed in the Results tab. You can choose to ignore the filter fields and simply click **List**, which returns all of the entities in the PPM Workbench window.

Saved Queries

Queries that are run frequently can be saved and re-run using the saved query functionality. When saving a query, the saved query is only available to the configuration entity Workbench window where you created the saved query. For example, a saved query in the Request Type Workbench window is not available in the User Data Workbench window.

Creating Saved Queries

To create a saved query:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

The configuration entity Workbench window opens with the **Query** tab.

3. In the **Query** tab, enter the search criteria and click **Save Query**.

The Save Query window opens.

4. In the Save Query window, in **Query Name**, enter a unique query name for the query and click **Save**.

The query is saved.

Using Saved Queries

To use a saved query:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

The configuration entity Workbench window opens with the **Query** tab.

3. In the **Query** tab, from the **Query** field, select a saved query name and click **List**.

The query is run with the parameters of the saved search query.

Deleting Saved Queries

To delete a saved query:

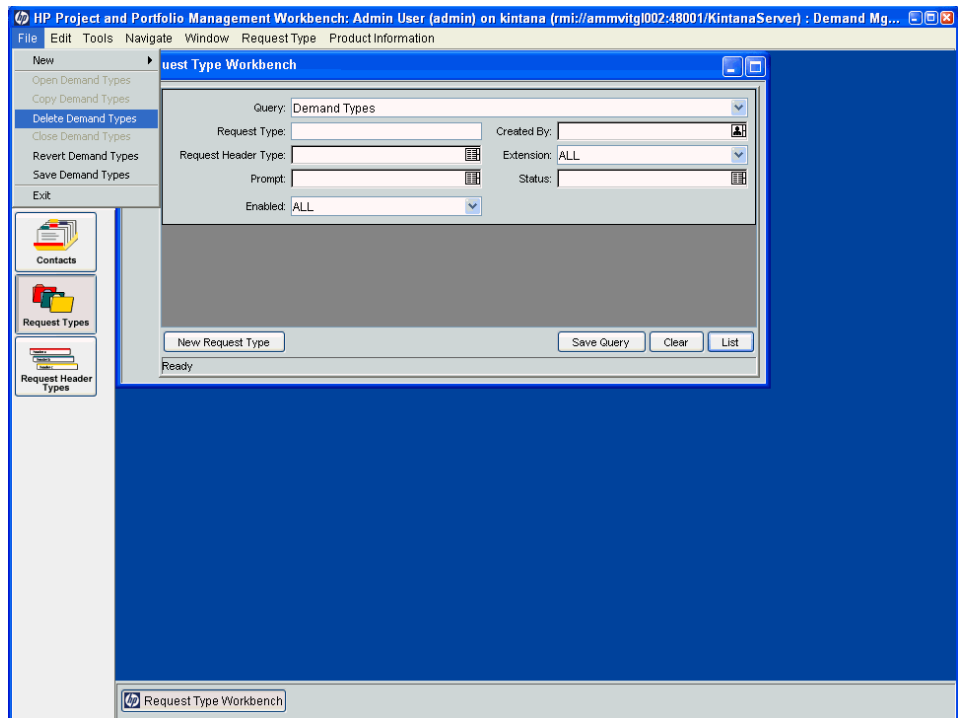
1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

The configuration entity Workbench window opens with the **Query** tab.

3. In the **Query** tab, from the **Query** field, select a saved query name.

The selected saved query is highlighted.

4. From the PPM Workbench menu, select **File > Delete <Query>** where **<Query>** is the name of the query to delete.



A Question Dialog opens.

5. In the Question Dialog, click **Yes**.

The saved query is deleted.

Case Sensitivity and Using Wildcards

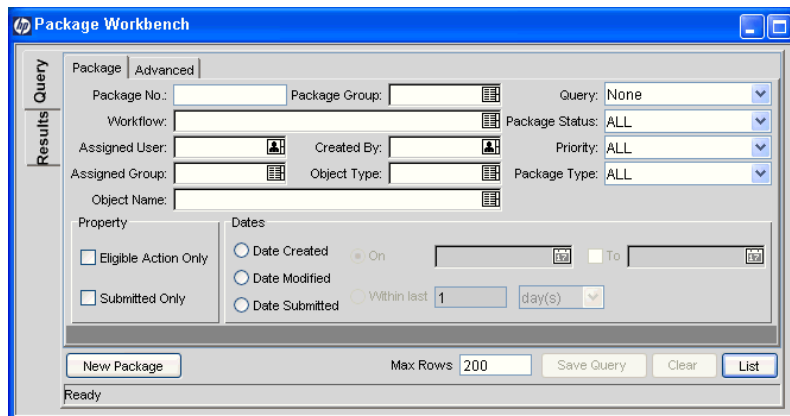
Filter fields are case insensitive. For example, entering the word **test** in a filter field would return **test**, **TEST**, and **Test**. Filter fields also return partial matches. For example, entering the word **test** in a filter field could return **Test Project** and **Testing Project**.

Filter fields also accept the wildcard character %, which matches against any character. For example, entering **%ample** in a filter field could return **Example** and **Sample**. However, simply entering **ample** in a filter field would not return **Example** and **Sample**.

Advanced Queries

The Package Workbench window **Query** tab includes the **Advanced** tab, where you can enter complex search criteria for packages (see *Figure 3-1*).

Figure 3-1. Package Workbench window

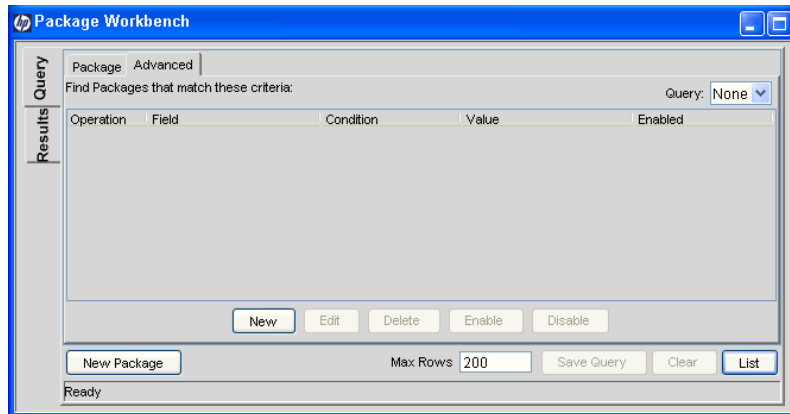


To enter advanced query criteria:

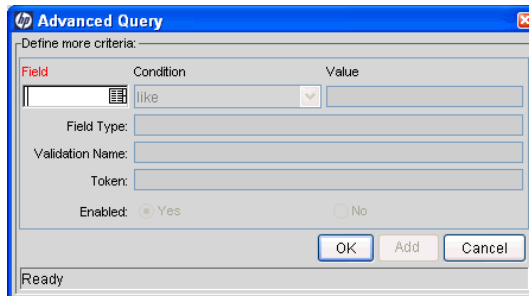
1. Open the PPM Workbench.
2. Select the Package Workbench window.

The Package Workbench window opens with the **Query** tab. The **Package** tab of the **Query** tab is displayed.

3. In the **Package** tab, complete the search criteria and click the **Advanced** tab.
The **Advanced** tab opens.



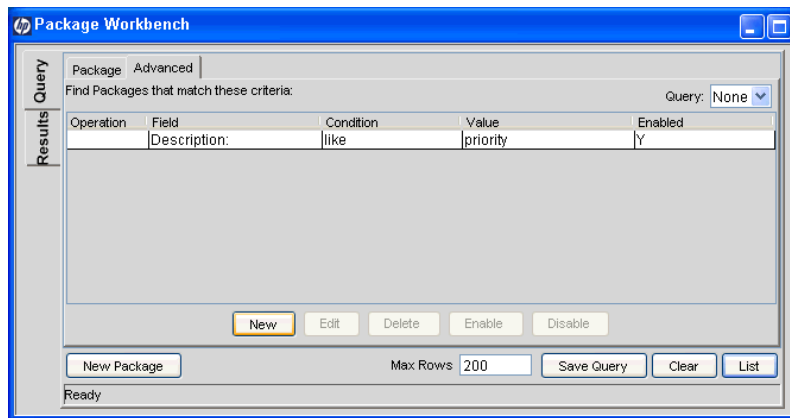
4. In the **Advanced** tab, click **New**.
The Advanced Query window opens.



5. In the Advanced Query window, complete the filter fields and click **Add**.
See [Table 3-1](#) for the list of conditions. The advanced query logic is added to the query.

Table 3-1. Boolean operators

Condition	Description
Like	Looks for close matches of the value to the contents of the selected field.
Not like	Looks for contents in the selected field which are not close matches to the value field.
Equal to	Looks for an exact match of the value to the contents of the selected field.
Not equal to	Returns all results which are not an exact match of the value to the contents of the selected field.
Is null	Returns all instances in which the selected field is blank.
Is not null	Returns all instances in which the selected field is not blank.
Greater than	Looks for a numerical value in excess of the value entered in the Value field.
Less than	Looks for a numerical value below the value entered in the Value field.
Greater than equal to	Looks for a numerical value in excess or the same as the value entered in the Value field.
Less than equal to	Looks for a numerical value below or the same as the value entered in the Value field.



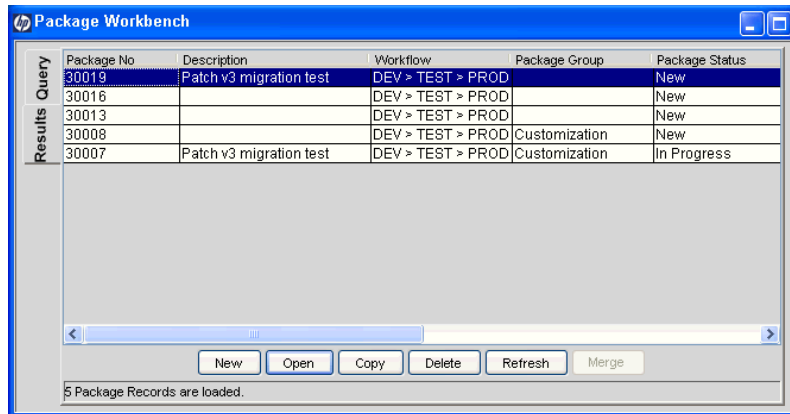
6. In the **Advanced** tab, click **List**.

The search begins. When performing the search, PPM Center uses the search criteria specified on the **Package** tab. All matches are then filtered using the search criteria specified on the **Advanced** tab. Only packages matching all of the filter fields are displayed in the **Results** tab. If no matches are returned, you could be less restrictive by disabling or removing some of the search criteria.

Selecting Configuration Entities

The **Results** tab displays all of the configuration entities matching the search criteria. The results can be sorted on any of the fields by clicking the column header. In the **Results** tab, select any of the returned configuration entities (or a range of configuration entities) for viewing, copying, or modifying (see [Figure 3-2](#)).

Figure 3-2. Results tab



The screenshot shows the HP Package Workbench interface. The 'Results' tab is active, displaying a table of configuration entities. The table has five columns: Package No, Description, Workflow, Package Group, and Package Status. The data is as follows:

Package No	Description	Workflow	Package Group	Package Status
30019	Patch v3 migration test	DEV > TEST > PROD		New
30016		DEV > TEST > PROD		New
30013		DEV > TEST > PROD		New
30008		DEV > TEST > PROD	Customization	New
30007	Patch v3 migration test	DEV > TEST > PROD	Customization	In Progress

Below the table, there are buttons for 'New', 'Open', 'Copy', 'Delete', 'Refresh', and 'Merge'. At the bottom, it states '5 Package Records are loaded.'

To select a contiguous group of configuration entities:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, enter the search criteria and click **List**.

The results are displayed in the **Results** tab.

4. In the **Results** tab, select one entity.

The entity is highlighted.

5. Hold down the **shift** key and select another entity.

All of the entities between the two select entities are highlighted.

6. Click **Open** or **Delete**.

All of the highlighted entities are opened or deleted.

To select several separated entities:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, enter the search criteria and click **List**.

The results are displayed in the **Results** tab.

4. In the **Results** tab, select one entity.

The entity is highlighted.

5. Hold down the **ctrl** key and select another entity.

Both of the selected entities are highlighted.

6. Click **Open** or **Delete**.

Both of the highlighted entities are opened or deleted.

The **Results** tab also provides buttons for executing other common tasks. From the **Results** tab, users can create **New** entities, **Open**, **Copy**, or **Delete** existing entities, or re-run the query by clicking **Refresh**.

Opening, Deleting, and Copying Entities

To open, delete, or copy an entity:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, enter the search criteria and click **List**.

The results are displayed in the **Results** tab.

4. In the **Results** tab, select an entity.

The entity is highlighted.

5. Open, delete, or copy the entity.

- To open the entity, in the **Results** tab, click **Open**.
- To delete the entity, in the **Results** tab, click **Delete**. A question dialog opens, asking if you want to delete the entity.
- To copy the entity, in the **Results** tab, click **Copy**. A copy dialog window opens, asking for a name for the new (copied) entity.

Creating New Entities

To create a new entity:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, click **New <Entity_Type>**, where **<Entity_Type>** is the type of entity, such as **New Package**.

The entity's detail window opens.

4. In the detail window, complete the fields as required and click **OK**.

The entity is created.

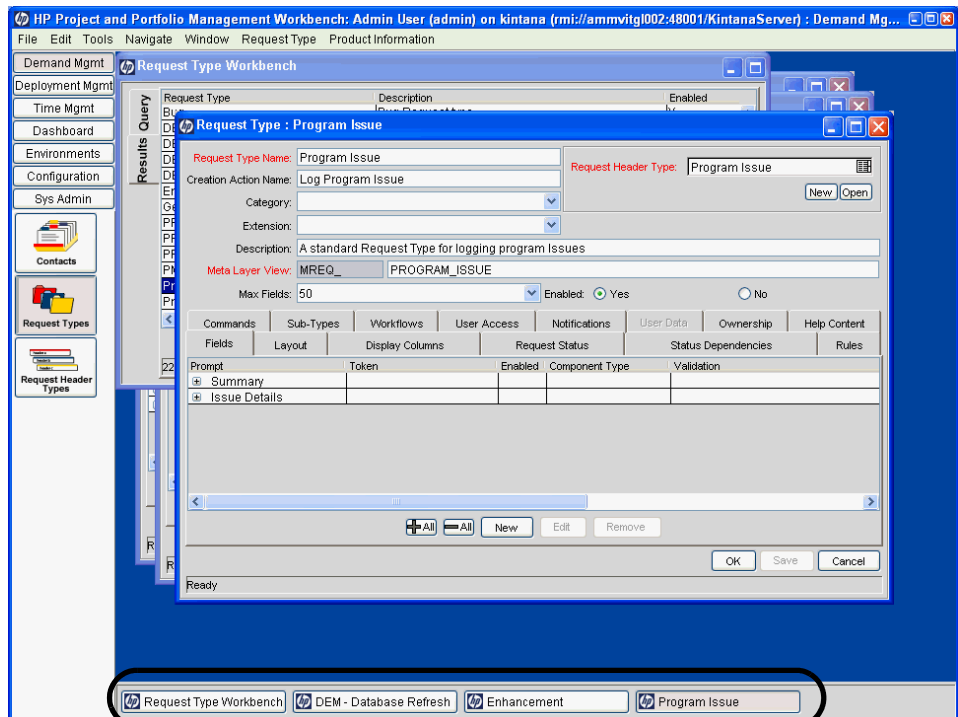
Navigating PPM Workbench Windows

In the PPM Workbench, the shortcut bar is typically used to navigate to a configuration entity Workbench window. You can also navigate the PPM Workbench using the **Navigate** menu on the PPM Workbench menu.

Every PPM Workbench window has a Query tab, which is used to search PPM Center for entities associated with the PPM Workbench window. The results of a Query tab search are listed in the PPM Workbench window's Results tab. Toggle between the Query tab and Results tab using the tabs in the upper-left corner of the PPM Workbench window (see [Figure 3-3](#)).

When multiple detail windows are open, an individual detail window can be accessed using the buttons at the bottom of the PPM Workbench, as shown in [Figure 3-3](#). If you minimize a detail window, or even a PPM Workbench window, you can view the window by clicking the appropriate button at the bottom of the PPM Workbench.

Figure 3-3. Navigating among multiple open detail windows



4 What's Next

After This Document

Now that you've read this document, you should be better able to get around the PPM Center Web pages and the PPM Workbench.

But now what?

You can access the PPM Center Documentation Library by selecting **Product Information > Library** from the menu bar in the PPM Center Web pages. The Documentation Library included when PPM Center is first installed contains documentation lists in PDF form arranged by the following categories:

- General Interest
- System Administration Guides
- User Guides
- Configuration Guides
- Supplemental Information
- General Guides and Reference Manuals

A Master Index of all topics in the PPM Center documentation is available. Click on **PDF** for the Suggested General Interest Guides in the Documentation Library page for more information.



The Documentation Library can be customized by your system administrator to display only the documents relevant for your organization.

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