

HP Project and Portfolio Management Center

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Reports Guide and Reference

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

- Software version number, which indicates the software version
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To check for recent updates, or to verify that you are using the most recent edition of a document, go to:
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- Submit and track support cases and enhancement requests
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1 Getting Started with HP Project and Portfolio Management Center Reports

Introduction to HP Project and Portfolio Management Center Reports

HP Project and Portfolio Management Center (PPM Center) provides a predefined set of reports that allow you to view (in a Web browser) the current status of your PPM Center data.



Within PPM Center, the term “report” has multiple meanings based on its context. You can create and submit a “report” that is actually a query. In response to this query, PPM Center provides a “report” that is actually the result of the query.

To submit and view report queries you must have the System: Submit Reports access grant. Additionally, submitting and viewing report results may be further limited by your:

- Product licenses
- Security group assignments

When you prepare to submit a report, you are presented with a set of filter fields from which you can specify the criteria for the report. The resulting report shows only the data that matches the criteria. [Chapter 2, *Running Reports*, on page 13](#) describes how to create and submit report queries, as well as how to access and view the results. [Chapter 8, *Report Types*, on page 169](#) provides information about report types, the mechanism you can use to create reports tailored to meet your business needs.

The majority of the PPM Center reports are submitted and viewed from the standard interface. Another type of report in PPM Center (not discussed in this

document) are server reports, which gather administrative diagnostics and are submitted and viewed from the PPM Workbench. For information about server reports, see the *Installation and Administration Guide*.

Running and Viewing Reports in a Multilingual User Interface

If you run a report on a PPM Center instance that supports multiple languages, the report is displayed in the language you selected at logon (your *session* language). Because a report is generated only once, the language used to display the contents does not change, and any user who later views the report sees it in its original language. For information about multilingual support in PPM Center, see the *Multilingual User Interface Guide*.

Report Categories

The following report categories are provided in PPM Center and include the HP-supplied reports. Any reports created for your company should also be found in these categories.

- **Administrative.** These reports focus on administrative tasks and are available to users with a variety of licenses (depending on the report) and are detailed in [Chapter 3, *Administrative Reports*, on page 33](#).

Also included in this category are reports related to the HP Open Interface. For more information about these reports, see the *Open Interface Guide and Reference*.

- **Deployment Management.** These reports are available to users with an HP Deployment Management application license and are detailed in [Chapter 4, *Deployment Management Reports*, on page 67](#).
- **Demand Management.** These reports are available to users with an HP Demand Management application license and are detailed in [Chapter 5, *Demand Management Reports*, on page 111](#).
- **Financial Management.** HP Financial Management reports are available to users with different licenses (depending on the report). These reports appear in multiple categories and are described in [Chapter 6, *Project Management Reports*, on page 149](#).

- **Portfolio Management.** No HP-supplied reports are provided for HP Portfolio Management. However, this category is provided as a place to organize your company's portfolio management reports.
- **Program Management.** No reports are supplied for HP Program Management, but the category is provided for your convenience.
- **Project Management.** These reports are available to users with an HP Project Management application license and are detailed in [Chapter 6, *Project Management Reports*, on page 149.](#)
- **Resource Management.** These reports are available to users with different licenses (depending on the report). These reports appear in multiple categories and are described in [Chapter 3, *Administrative Reports*, on page 33](#) and [Chapter 7, *Time Management Reports*, on page 155.](#)
- **Time Management.** These reports are available to users with an HP Time Management application license and are detailed in [Chapter 7, *Time Management Reports*, on page 155.](#)
- **Extension.** These reports are available to users with the applicable HP Deployment Management Extension license.

Extension-related reports are included in the relevant Extension documentation.

Related Information

This document presumes a basic working knowledge of PPM Center usage and application configuration.

The following documents include information related to PPM Center reports:

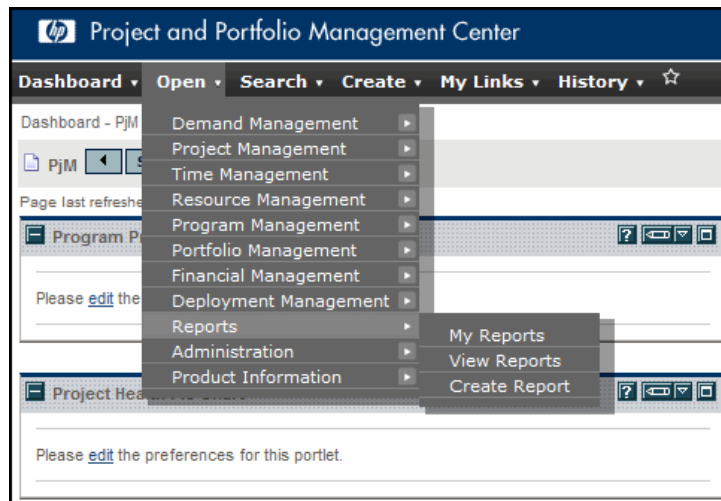
- *Security Model Guide and Reference*
- *HP-Supplied Entities Guide* (includes brief descriptions, licensing information, and access grants for all PPM Center reports)

2 Running Reports

Reports Menu

Use the **Reports** menu in the standard interface (shown in *Figure 2-1*) to submit and view reports. Note that three of the HP Demand Management reports are also available from the **Demand Management** menu.

Figure 2-1. Reports menu in the standard interface



For information about submitting and running PPM Server reports in the PPM Workbench interface, see the *Installation and Administration Guide*.

Submitting Reports

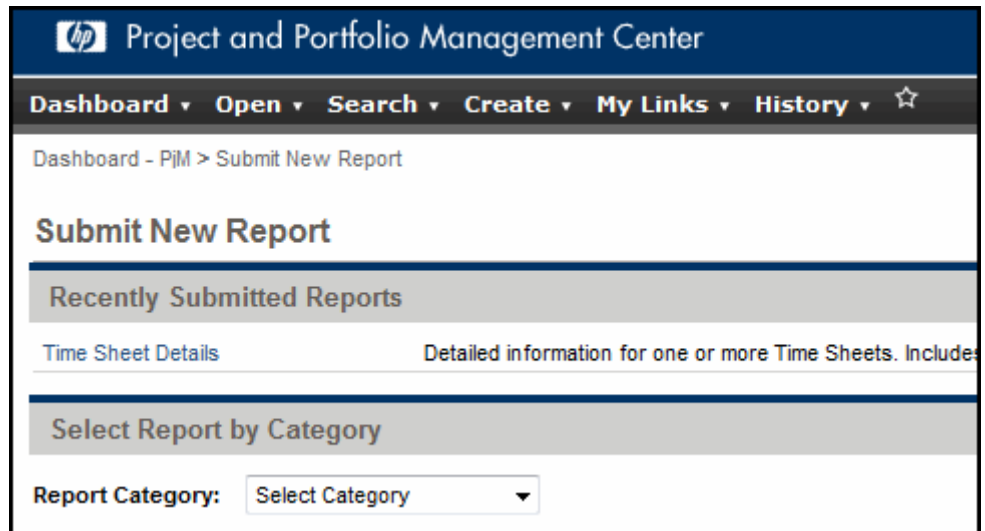


Users must have the System: Submit Report access grant to view or submit any report.

To submit a report:

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

The Submit New Report page opens.



3. Select the report to be submitted:
 - From the **Recently Submitted Reports** section:
 - Click the link for the desired report.
 - From the **Select Report by Category** section:
 - For **Report Category**, select the appropriate category.
 - Click the link for the desired report.

You have access to only those report categories for which you are licensed. In addition, the list of available reports might be further restricted by security settings on individual report types. For more information about report security, see the *Security Model Guide and Reference*.

Once a report is selected, the Submit Report: <Report Name> window opens. This window is sometimes termed the “report submission page.”

Submit Report: Time Sheet Details Close Window

Report Parameters Restore Default

*Period Type:

*Time Period:

Resource:

Resource Group:

Description Contains:

Report Title:

*Show Time Sheet Notes: Yes No

*Show Charge Codes: Yes No

*Include Frozen and Closed: Yes No

*Include Cancelled: Yes No

Status:

Time Sheet #:

*Order By:

*Show Line Notes: Yes No

*Show Activity Details: Yes No

Scheduling and Output Options

Run Report Immediately

Run Report On:

Repeat Every Hours Until

Send email to: when report is finished

Advanced Notifications

Submit Cancel

Close Window

The Submit Report: <Report Name> window has the following sections:

- **Report Parameters.** This section contains the set of filter fields relevant to the selected report.
- **Scheduling and Output Options.** This section allows you to choose whether to run the report immediately, schedule it for a later time, or automatically run the report on a periodic basis. It also allows you to request that an email be sent to selected users when the report is finished.
- **Advanced Notifications.** This section allows you to send notifications when the report completes, fails, or either results.

Each report has its own set of fields. For information about report fields, see the description in:

- The relevant chapter in this document (for example, to find information about HP Deployment Management reports, see [Chapter 4, *Deployment Management Reports*, on page 67](#))
 - The applicable HP Deployment Management Extension document (for example, to find information about report types related to Oracle E-Business Suite, see the *HP Deployment Management Extension for Oracle E-Business Suite Guide*)
4. Type or change information in the fields to define the report results you want.

5. To run the report at a later time, on a periodic basis, or provide a brief notification once the report is finished, expand the **Scheduling** section, and then follow the steps for the task you want to accomplish.
 - To run the report (once) at a later time:
 - a. Select **Run Report On**.
 - b. Provide a valid date (using the field to the right of **Run Report On**).
 - To run the report on a periodic basis:
 - a. Select **Run Report On**.
 - b. Provide the date when you want the report first run (using the field to the right of **Run Report On**).
 - c. Select **Repeat Every**.
 - d. Provide the frequency and the date when you want the report run last (using the three fields to the right of **Repeat Every**).
 - To include a brief notification:
 - a. Select **Send email to**.
 - b. Provide the user IDs of the users who should receive the notification (using the field to the right of **Send email to**).

6. To add a notification that has more comprehensive features than those available with **Send email to**:
 - a. Expand the **Advanced Notifications** section.
 - b. Click **Add a Notification**.

The Edit Advanced Notifications window opens.

Edit Advanced Notifications

Description:

*Send when Report: Completes
 Fails

Recipients

| Send | Type | Recipient |
|----------|------------------|--------------------------|
| Send: To | Enter a Username | <input type="text"/> Add |

From:

Reply To:

Messages

Notification Template: Standard HTML Message (HTML)

*Subject:

Message:

```
<html>
<head>
<title>Mercury IT Governance Notification</title>
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
</head>
<STYLE TYPE="text/css">
<!--
body {background:#FFFFFF, color:#000000;}
A:link { font-family:Arial, Verdana, sans-serif; font-size: 11px; text-decoration:underline; color:#2E5390;}
A:active { font-family:Arial, Verdana, sans-serif; font-size: 11px; text-decoration:underline; color:#2E5390;}
-->
</pre>


HTML Preview



Add Cancel

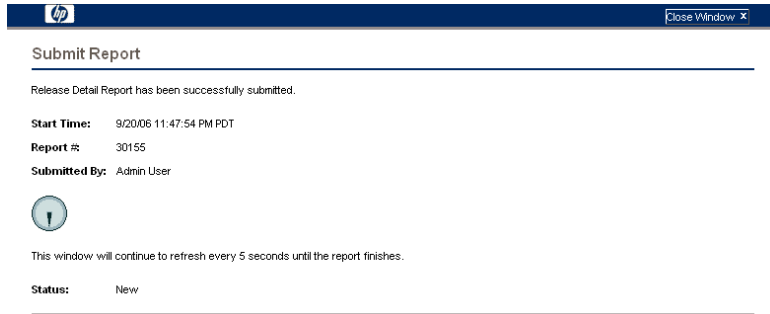

```

- c. Provide relevant information in this window.
- d. Click **Add**.

The Edit Advanced Notifications window closes.

7. Click **Submit**.

- For reports that are run immediately:
 - a. The Submit Report window opens. The status is refreshed until the report is complete.



The completed report is displayed in a separate window.

Print
Mercury : Run by Admin User, On Nov 17, 2004 04:33:42 PM PST

Request Detail Report

Audit the details of one or more requests. Includes header and detail information, notes, and status for each selected request.

Report Parameters for Report #30342
 Filter By: Include Closed - No Filter Notes - Show all notes)
 Include: Header, Details, Notes, Status, References
 Hiding prompts of fields where no value has been entered

Showing **60** Total Requests: Order By - Request Number

Generic Request - #30002

Description: HR Vacation Request URL not responding. **Most Recent Note:**

Request Status: New

Header

| | | |
|---|---|---------------------------------------|
| Summary | | |
| Request No.: 30002 | Request Type: Generic Request | Created By: Bob Brown |
| Department: Finance | | Created On: September 21, 2004 |
| Workflow: Bug Request Type Workflow | Application: HR Application | Request Status: New |
| Priority: Critical | Contact Email: ksmith@mercury1.com | Contact Name: Smith, Katie |
| Description: HR Vacation Request URL not responding. | | |
| Contact Phone: (408) 988-5409 | | |

Notes

Status

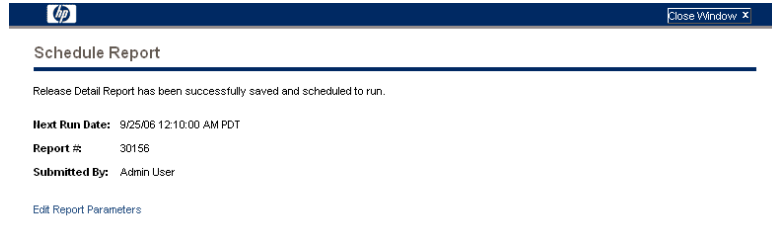
| Step # | Step Name | Status | Acted On By | Acted On |
|--------|--------------------|--------------------------|--------------------------|---------------------------------|
| 1 | Review Request | Review Request (Timeout) | workflow_timeout_service | September 22, 2004 09:58 AM PDT |
| 2 | Request Assigned | | | |
| 3 | Request Analysis | | | |
| 4 | Create Package | | | |
| 5 | Requestor Sign-off | | | |
| 6 | Close (Immediate | | | |

- b. (Optional) To print the completed report, click **Print**.



The print feature is not available for all reports. If a given report does not have a **Print** button, use your browser's print facility.

- For reports that are scheduled to run at a later time:
 - a. The Schedule Report window opens.



- b. The report results, or its status, can be accessed from the **Recently Submitted Reports** section of your My Reports page. See [Viewing Previously Submitted Report Results](#) for details.

Viewing Previously Submitted Report Results

You can view the results (or status) of previously submitted reports by selecting one of two menu items:

- **My Reports**
- **View Reports**

Using My Reports

To view the results of previously submitted reports using the **My Reports** menu:

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

The My Reports page opens. This page lists the results of the reports you submitted in the **Search Results: Reports** section and provides additional search functionality in the **Search for Reports** section.

My Reports

View Report #:

Export to Excel

Search Results: Reports Showing 1 - 4 of 4

| Report # | Report Type | Status | Created By | Run Date <small>▲</small> |
|--------------------------------|---|-----------------|------------|---------------------------|
| <input type="checkbox"/> 30030 | User Detail Report (Submission Details) | Completed (Log) | Admin User | 7/31/06 12:06:49 AM PDT |
| <input type="checkbox"/> 30031 | Security Group Detail Report (Submission Details) | Completed (Log) | Admin User | 7/31/06 12:07:58 AM PDT |
| <input type="checkbox"/> 30150 | Object History Report (Submission Details) | Completed (Log) | Admin User | 9/20/06 02:09:20 PM PDT |
| <input type="checkbox"/> 30156 | Release Detail Report (Submission Details) | Scheduled | Admin User | 9/25/06 12:10:00 AM PDT |

Showing 1 - 4 of 4

Export to Excel

Search for Reports

Report Type: Report #:

Created By: Repeating:

Status:

- Completed
- Failed
- Running
- Scheduled

All Reports

Scheduled Reports

- All Scheduled Reports
- Scheduled to run within the next Day(s)
- Scheduled to run From: To:

Previous Reports

- All Previous Reports
- Run within the last Day(s)
- Run From: To:

Sort By: Ascending Descending

Maximum Results Per Page:

3. To view the report results, do one of the following:

- In the **Report #** column, click the link for the report in the **Report #** column.
 - a. In the **View Report #** box, type the report number.
 - b. Click **Go**.

A new Web browser window opens and displays the report results.

Print
Mercury : Run by Admin User. On Nov 17, 2004 04:33:42 PM PST

Request Detail Report

Audit the details of one or more requests. Includes header and detail information, notes, and status for each selected request.

Report Parameters for Report #30342
Filter By: Include Closed - No Filter Notes - Show all notes
Include: Header, Details, Notes, Status, References
 Hiding prompts of fields where no value has been entered

Showing **60** Total Requests: Order By - Request Number

Generic Request - #30002

Description: HR Vacation Request URL not responding. **Most Recent Note:**

Request Status: New

Header

Summary

| | | |
|--|---|---------------------------------------|
| Request No.: 30002 | Request Type: Generic Request | Created By: Bob Brown |
| Department: Finance | | Created On: September 21, 2004 |
| Workflow: Bug Request Type Workflow | Application: HR Application | Request Status: New |
| Priority: Critical | Contact Email: ksmith@mercury1.com | Contact Name: Smith, Katie |
| | | Contact Phone: (408) 988-5409 |

Description: HR Vacation Request URL not responding.

Notes

Status

| Step # | Step Name | Status | Acted On By | Acted On |
|--------|--------------------|--------------------------|--------------------------|---------------------------------|
| 1 | Review Request | Review Request (Timeout) | workflow_timeout_service | September 22, 2004 09:58 AM PDT |
| 2 | Request Assigned | | | |
| 3 | Request Analysis | | | |
| 4 | Create Package | | | |
| 5 | Requestor Sign-off | | | |
| 6 | Close (Immediate | | | |

Using View Reports

To view the results of previously submitted reports using the **View Reports** menu:

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

The View Reports page opens.

The screenshot shows the 'View Reports' page in the Project and Portfolio Management Center. The page has a dark blue header with the HP logo and the text 'Project and Portfolio Management Center'. Below the header is a navigation bar with links: 'Dashboard', 'Open', 'Search', 'Create', 'My Links', and 'History'. The main content area is titled 'View Reports' and contains a search form. The form includes a 'View Report #' field with a 'Go' button. Below this is a 'Search for Reports' section with several filters: 'Report Type' (text input), 'Report #' (text input), 'Created By' (text input with a user icon), and 'Repeating' (dropdown menu set to 'ALL'). There are also radio buttons for 'Status' (with 'Completed' checked) and 'Previous Reports' (with 'All Previous Reports' selected). Other filters include 'Scheduled to run From' and 'To' (date pickers), 'Run within the last' (text input) and 'Day(s)' (dropdown), and 'Run From' and 'To' (date pickers). At the bottom, there is a 'Sort By' dropdown set to 'Run Date', radio buttons for 'Ascending' (selected) and 'Descending', and a 'Maximum Results Per Page' field set to '50'.

- In the **Search for Reports** section, provide the search criteria in the appropriate fields, and then click **Search**.

The View Reports page is updated to display the search results.

View Reports

View Report #:

Search Results: Reports Showing 1 - 4 of 4

| Report # | Report Type | Status | Created By | Run Date |
|--------------------------------|---|-----------------|------------|-------------------------|
| <input type="checkbox"/> 30030 | User Detail Report (Submission Details) | Completed (Log) | Admin User | 7/31/06 12:06:49 AM PDT |
| <input type="checkbox"/> 30031 | Security Group Detail Report (Submission Details) | Completed (Log) | Admin User | 7/31/06 12:07:58 AM PDT |
| <input type="checkbox"/> 30150 | Object History Report (Submission Details) | Completed (Log) | Admin User | 9/20/06 02:09:20 PM PDT |
| <input type="checkbox"/> 30156 | Release Detail Report (Submission Details) | Scheduled | Admin User | 9/25/06 12:10:00 AM PDT |

Showing 1 - 4 of 4

Search for Reports

Report Type: Report #:

Created By: Repeating:

Status: Completed
 Failed
 Running
 Scheduled

All Reports

Scheduled Reports

- All Scheduled Reports
- Scheduled to run within the next
- Scheduled to run From: To:

Previous Reports

- All Previous Reports
- Run within the last
- Run From: To:

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

4. To view the report results, do one of the following:

- In the **Report #** column, click the report link.
 - a. In **View Report #** box, type the report number.
 - b. Click **Go**.

A new Web Browser window opens and displays the report results.

Print
Mercury : Run by Admin User. On Nov 17, 2004 04:33:42 PM PST

Request Detail Report

Audit the details of one or more requests. Includes header and detail information, notes, and status for each selected request.

Report Parameters for Report #30342
Filter By: Include Closed - No Filter Notes - Show all notes;
Include: Header, Details, Notes, Status, References
 Hiding prompts of fields where no value has been entered

Showing **60** Total Requests: Order By - Request Number

Generic Request - #30002

Description: HR Vacation Request URL not responding. **Most Recent Note:**

Request Status: New

Header

Summary

| | | |
|--|---|---------------------------------------|
| Request No.: 30002 | Request Type: Generic Request | Created By: Bob Brown |
| Department: Finance | | Created On: September 21, 2004 |
| Workflow: Bug Request Type Workflow | Application: HR Application | Request Status: New |
| Priority: Critical | Contact Email: ksmith@mercury1.com | Contact Name: Smith, Katie |
| | | Contact Phone: (408) 988-5409 |

Description: HR Vacation Request URL not responding.

Notes

Status

| Step # | Step Name | Status | Acted On By | Acted On |
|--------|--------------------|--------------------------|--|---------------------------------|
| 1 | Review Request | Review Request (Timeout) | workflow_timeout_service workflow_timeout_service | September 22, 2004 09:58 AM PDT |
| 2 | Request Assigned | | | |
| 3 | Request Analysis | | | |
| 4 | Create Package | | | |
| 5 | Requestor Sign-off | | | |
| 6 | Close (Immediate | | | |

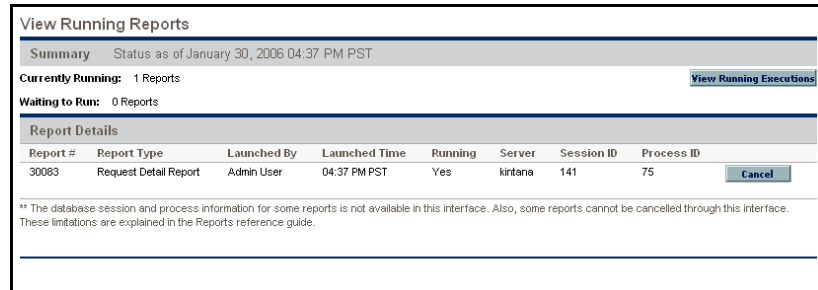
Viewing and Cancelling Running Reports

To access the View Running Reports page, you must have the Administrator License and the Sys Admin: Server Tools: Execute Admin Tools access grant.

To view, and optionally cancel, a running report:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Report Execution > View Running Reports**.

The View Running Reports page opens.



The screenshot shows the 'View Running Reports' interface. At the top, it says 'View Running Reports' and 'Summary Status as of January 30, 2006 04:37 PM PST'. Below this, it indicates 'Currently Running: 1 Reports' with a 'View Running Executions' button, and 'Waiting to Run: 0 Reports'. A 'Report Details' section contains a table with the following data:

| Report # | Report Type | Launched By | Launched Time | Running | Server | Session ID | Process ID | |
|----------|-----------------------|-------------|---------------|---------|---------|------------|------------|---------------------------------------|
| 30083 | Request Detail Report | Admin User | 04:37 PM PST | Yes | kirtana | 141 | 75 | <input type="button" value="Cancel"/> |

Below the table, a note states: '** The database session and process information for some reports is not available in this interface. Also, some reports cannot be cancelled through this interface. These limitations are explained in the Reports reference guide.'

The **Report Details** section lists and provides summary information about reports currently running and reports scheduled to run.

The following table lists the fields displayed on the View Running Reports page.

| Field Name | Description |
|-------------------------------|--|
| Summary section | |
| Currently Running | Provides the number of reports currently running. |
| Waiting to Run | Number of submitted reports waiting to run. These are not the reports that are scheduled to run. Rather, they are not running because of current load on the system and will run as soon as the current report runs are completed. |
| Report Details section | |
| Report # | Report ID. |
| Report Type | Report name. |
| Launched By | Full name of the user who submitted the report. |
| Launched Time | Time at which the report was submitted. |
| Running | Indicates whether the report is running (Yes) or waiting (No). |
| Server | Name of the PPM Server running the report. |
| Session ID | Oracle database session ID for the session that the report uses to query data. |
| Process ID | Oracle database process ID for the process that the report uses. |
| Cancel | <p>Cancels a report that is currently running or waiting to be run.</p> <p>You can cancel only the reports listed in Reports That Can Be Cancelled on page 28.</p> |

3. To cancel a report, click **Cancel** in the row for the report.

After you cancel the report submission, the page refreshes and no longer lists the report.



Reports that do not use the `ksc_run_jsp_report` special command are subject to some limitations and cannot be cancelled from the View Running Reports page. The following section, *Reports That Can Be Cancelled*, lists the reports you can cancel from the View Running Reports page.

Reports That Can Be Cancelled

You can cancel the following reports from the View Running Reports page:

- ALM - Change Summary Report
- ALM - Forward Schedule of Releases
- ALM - Forward Schedule of Changes for RFC
- ALM - Release Content Report
- ALM - Release Summary Report
- Contact Detail Report
- Import Users
- Notification History Report
- Project Cost Breakdown
- Project Cost Details
- Request Detail (Filter by Custom Fields) Report
- Request Detail Report
- Request History Report
- Request Quick View
- Request Summary (Filter by Custom Fields Report)
- Request Type Detail Report
- Time Sheet Details
- Time Sheet Summary

- User Detail Report

Deleting Report Results

Over time, report results become outdated and are no longer useful.

To delete report results:

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

The My Reports page opens. The results of the reports you submitted are found in the **Search Results: Reports** section.

My Reports

View Report #:

Export to Excel

Search Results: Reports Showing 1 - 4 of 4

| Report # | Report Type | Status | Created By | Run Date Δ |
|--------------------------------|---|-----------------|------------|-------------------------|
| <input type="checkbox"/> 30030 | User Detail Report (Submission Details) | Completed (Log) | Admin User | 7/31/06 12:06:49 AM PDT |
| <input type="checkbox"/> 30031 | Security Group Detail Report (Submission Details) | Completed (Log) | Admin User | 7/31/06 12:07:58 AM PDT |
| <input type="checkbox"/> 30150 | Object History Report (Submission Details) | Completed (Log) | Admin User | 9/20/06 02:09:20 PM PDT |
| <input type="checkbox"/> 30156 | Release Detail Report (Submission Details) | Scheduled | Admin User | 9/25/06 12:10:00 AM PDT |

Export to Excel Showing 1 - 4 of 4

Search for Reports

Report Type: Report #:

Created By: Repeating:

Status:

- Completed
- Failed
- Running
- Scheduled

All Reports

Scheduled Reports

- All Scheduled Reports
- Scheduled to run within the next Day(s)
- Scheduled to run From: To:

Previous Reports

- All Previous Reports
- Run within the last Day(s)
- Run From: To:

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

3. You can delete one or more report results.

- To delete all the report results:

- a. Click **Check All**.

If you change your mind about your choices, you can either clear single checkboxes, or click **Clear All** to clear all of the checkboxes.

- b. Click **Delete**.

- To delete one or more report results:

- a. Select the checkbox to the left of the report results to delete.

If you change your mind about your choices, you can either clear single checkboxes, or click **Clear All** to clear all of the checkboxes.

- b. Click **Delete**.

3 Administrative Reports

Contact Synchronization Report

The Contact Synchronization report enables you to determine whether HP Demand Management contacts are correctly defined and associated with PPM Center users.

You can use this report to detect all PPM Center users who have no corresponding contact record, and then create contact records for them. The Contact Synchronization report also searches for and corrects discrepancies between the contact and PPM Center user information in the system.

Use the Contact Synchronization report to uncover and correct the following problems:

- Users who have no corresponding contact records
- Users who have multiple corresponding contact records
- Contact records associated with user names that are not in the system
- Contact records that use the same first and last names as PPM Center users, but are not associated with those users
- Enabled contact records associated with PPM Center users who are no longer in the system
- Enabled PPM Center users with contact records that are disabled
- PPM Center users and contact pairs that have different data in common fields (such as a different first name)

To correct these problems, you can choose to have PPM Center create contact records for users who have none, and then update contact names and email addresses that are not correctly synchronized with user records.

You can run the Contact Synchronization report only if you have a Configuration license and belong to at least one of the following security groups:

- PPM Administrator
- PPM All Access Grants
- PPM Billing Approver
- PPM Cost Manager
- PPM Demand Management Administrator
- PPM Demand Manager
- PPM Deployment Management Administrator
- PPM Program Manager
- PPM Project Manager
- PPM Resource Manager
- PPM Service Security Group
- PPM Team Manager
- PPM Time Administrator
- PPM Time Manager
- PPM User
- PPM User Admin



This report belongs to both Administrative and Resource Management report categories.

Figure 3-1. Contact Synchronization report fields

Report Parameters Restore Default

Create Contacts? Yes No

Update Contacts? Yes No

Driver:

Table 3-1. Contact Synchronization report field descriptions (page 1 of 2)

| Field Name | Description |
|-----------------|---|
| Create Contacts | <p>Option to create contacts for users who have no associated contact records. Note that some of these contacts may need to be manually associated with users. Choices include:</p> <ul style="list-style-type: none"> • Yes. To create new contact records. • No. To review the results of the report without creating any contacts. <p>HP recommends that you run the report using No, so that you can verify the correct processing of the section listing contacts that have the same first and last names as a PPM Center user. If no manual updates are required, then select Yes, and then rerun the report.</p> |

Table 3-1. Contact Synchronization report field descriptions (page 2 of 2)

| Field Name | Description |
|-----------------|---|
| Update Contacts | <p>Determines whether PPM Center creates or updates contacts for users associated with a contact whose name, email, or enabled status is out-of-date.</p> <p>To update contact records, click Yes. To review the report results without updating contacts, click No.</p> <p>HP recommends that you run this report with No selected, so that you can verify the correct processing of the section detailing associated user and contact pairs that have different data in common fields. If no manual updates are required, then select Yes and rerun the report.</p> |
| Driver | <p>Determines how records are to be synchronized. Select one of the following:</p> <ul style="list-style-type: none"> • To synchronize records based on the user record, select User. • To synchronize records based on the contact record, select Contact. • To synchronize records based on the most recently updated record, select Last Update Date. |

Data Source Detail Report

The Data Source Detail report displays the configuration details for one or more data sources. To run the Data Source Detail report, you must have the Configuration license.

Figure 3-2. Data Source Detail report fields

Table 3-2. Data Source Detail report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| Data Source From | Select the starting data source. The report includes only data sources with names equal to or greater than this value for those data sources available on your PPM Center instance. |
| Data Source To | Select the ending data source. The report includes only data sources with names equal to or less than this value for those data sources available on your PPM Center instance. |
| *Show Columns | Indicate whether to show columns and their details. |
| *Show Filter Fields | Indicate whether to show filter fields. |
| *Show Full Query | Indicate whether to show the full query. |
| *Show Used By | Indicate whether to list the portlets that rely on these data sources. |

Import Requests Report

The Import Requests report runs the Request Open Interface to validate and load request data from the Request Open Interface tables into the standard HP Demand Management data model. To run this report, you must have the Configuration license. For more information about this report, see the *Open Interface Guide and Reference*.

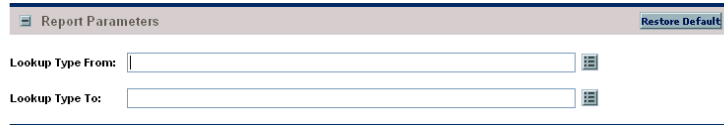
Import Users Report

The Import Users report runs the User Open Interface to import and validate data from the user interface tables or an LDAP server into the PPM Center user data model. To run this report, you must have the User Administration license. For more information about this report, see the *Open Interface Guide and Reference*.

Lookup Types Report

The Lookup Types report provides information about one or more lookups. To run this report, you must have the Configuration license.

Figure 3-3. Lookup Types report fields



The screenshot shows a web interface for the 'Report Parameters' section. It features a 'Restore Default' button in the top right corner. Below the title, there are two input fields: 'Lookup Type From:' and 'Lookup Type To:'. Each field has a small icon to its right, likely for clearing or resetting the value.

Table 3-3. Lookup Types report field descriptions

| Field Name | Description |
|------------------|--|
| Lookup Type From | Select the starting lookup type. The report will include only lookup types whose names are equal to or greater than this value for the lookup types available on your PPM Center instance. |
| Lookup Type To | Select the ending lookup type. The report will include only lookup types whose names are equal to or less than this value for the lookup types available on your PPM Center instance. |

Notification History Report

The Notification History report provides information about notifications that were sent or are pending. It contains information such as the following:

- Notification date
- Entity type
- Subject of the notification
- Sent and reminder flags

To run the Notification History report, you must have the Configuration license.

Figure 3-4. Notification History report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link in the top right. The form contains several input fields and controls:

- Trigger Date From:** A text input field with a calendar icon.
- Trigger Date To:** A text input field with a calendar icon.
- *Unsent Notifications Only?** Radio buttons for "Yes" and "No", with "No" selected.
- Sent on Date From:** A text input field with a calendar icon.
- Sent on Date To:** A text input field with a calendar icon.
- Type of Notification Parent:** A dropdown menu with "Request" selected.
- For a Specific Parent:** A text input field with a calendar icon.
- Workflow:** A text input field with a calendar icon.
- Workflow Step:** A text input field with a calendar icon.
- Email Subject Line Contains:** A text input field.
- Sent to Email Address:** A text input field.
- Sent to User:** A text input field with a user icon.
- Report Title:** A text input field containing "Notification History Report".

Table 3-4. Notification History report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|----------------------------|--|
| Trigger Date From | Select the starting date. The report includes notifications triggered on or after this date. |
| Trigger Date To | Select the ending date. The report includes notifications triggered on or before this date. |
| *Unsent Notifications Only | Indicate whether to show only unsent notifications. |

Table 3-4. Notification History report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|-----------------------------|---|
| Sent on Date From | Select the starting date. The report includes notifications sent on or after this date. |
| Sent on Date To | Select the ending date. The report includes notifications sent on or before this date. |
| Type of Notification Parent | Select one of the following parent types: <ul style="list-style-type: none"> • Request • Package • Project • Module |
| For a Specific Parent | Select a parent entity from the entities available on your PPM Center instance. |
| Workflow | Select a workflow from the workflows available on your PPM Center instance. |
| Workflow Step | Select a particular workflow step associated with Workflow . |
| Email Subject Line Contains | Email subject line. Type any alphanumeric string (200 characters maximum). |
| Sent to Email Address | Email address of recipient. Type any alphanumeric string (200 characters maximum). |
| Sent to User | Specify the user from the users available on your PPM Center instance. |
| Report Title | Type a unique report title (200 characters maximum). |

Object Type Detail Report

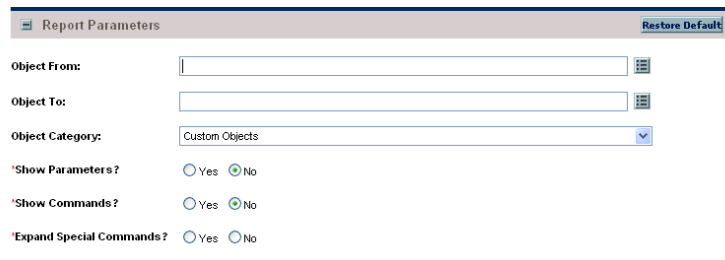
The Object Type Detail report lists all parameters and commands associated with a given object type.

This report is useful for the following:

- Auditing object types.
- Providing information that is helpful while you debug problems associated with entering information or migrating a package line of a specific object type.
- Auditing the description of an object type or a group of object types.

To run the Object Type Detail report, you must have the Configuration license.

Figure 3-5. Object Type Detail report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and options:

- Object From:** A text input field with a small grid icon to its right.
- Object To:** A text input field with a small grid icon to its right.
- Object Category:** A dropdown menu currently showing "Custom Objects".
- Show Parameters?:** Radio buttons for "Yes" and "No", with "No" selected.
- Show Commands?:** Radio buttons for "Yes" and "No", with "No" selected.
- Expand Special Commands?:** Radio buttons for "Yes" and "No", with "No" selected.

Table 3-5. Object Type Detail report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Object From | Starting object. The report includes object types with names equal to or greater than this value for the object types available on your PPM Center instance. |
| Object To | Ending object. The report includes object types with names equal to or less than this value for the object types available on your PPM Center instance. |
| Object Category | The report includes an object category from the categories available on your PPM Center instance. |

Table 3-5. Object Type Detail report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|--------------------------|---|
| *Show Parameters | Option to show the parameters and validations. |
| *Show Commands | Indicate whether to show the commands and command steps. |
| *Expand Special Commands | Indicate whether to expand user-defined special commands. |

Overview Section Detail Report

The Overview Section Detail report provides information about a portlet or range of portlets. It lists the portlet columns, as well as the SQL query that the portlet uses to retrieve data from the system. You can configure the report to include portlet filter fields and security configuration.

To run the Overview Section Detail report, you must have the Configuration license.

Figure 3-6. Overview Section Detail report fields

The screenshot shows a configuration window titled "Report Parameters" with a "Restore Default" button in the top right corner. Below the title bar, there are two text input fields: "Overview Section From:" and "Overview Section To:". Underneath these are seven rows of radio button options, each with a label and two choices: "Yes" and "No". The "No" option is selected for all seven rows.

- Show Columns: Yes No
- Show Filter Fields: Yes No
- Show Full Query: Yes No
- Show User Access: Yes No
- Show Overview Section URL: Yes No
- Show Used By: Yes No
- Show Help Content: Yes No

Table 3-6. Overview Section Detail report field descriptions

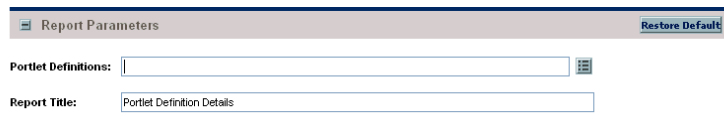
| Field Name (*Required) | Description |
|----------------------------|--|
| Overview Section From | Select the starting overview section. The report will include only overview sections whose name is equal to or greater than this value for those portlets available on your PPM Center instance. |
| Overview Section To | Select the ending overview section. The report will include only overview sections whose name is equal to or less than this value for those portlets available on your PPM Center instance. |
| *Show Columns | Option to show columns and their details. |
| *Show Filter Fields | Option to show filter fields. |
| *Show Full Query | Option to show the full query. |
| *Show User Access | Option to show the detailed security access rules. |
| *Show Overview Section URL | Option to show the URL for the overview sections. |
| *Show Used By | Option to show what users rely on these overview pages. |
| *Show Help Content | Option to show the help content. |

Portlet Definition Detail Report

The Portlet Definition Detail report displays the configuration details for one or more portlet definitions. The report details all preferences, display options, access, and help for each portlet definition.

To run the Portlet Definition Detail report, you must have the Configuration license.

Figure 3-7. Portlet Definition Detail report fields



The screenshot shows a web interface for configuring a report. At the top, there is a header bar with a menu icon and the text "Report Parameters" on the left, and a "Restore Default" button on the right. Below the header, there are two input fields. The first is labeled "Portlet Definitions:" and contains a text input field with a small icon to its right. The second is labeled "Report Title:" and contains a text input field with the text "Portlet Definition Details" entered.

Table 3-7. Portlet Definition Detail report field descriptions

| Field Name | Description |
|---------------------|---|
| Portlet Definitions | Select one or more of the portlets available on your PPM Center instance. |
| Report Title | Type a unique name for the report (200 characters maximum). |

Report Type Detail Report

The Report Type Detail report provides information about report type definitions. Use the report to view the parameters and parameter details for each report type, as well as the exact commands used to run the report. To run the Report Type Detail report, you must have the Configuration license.

Figure 3-8. Report Type Detail report fields

Table 3-8. Report Type Detail report field descriptions

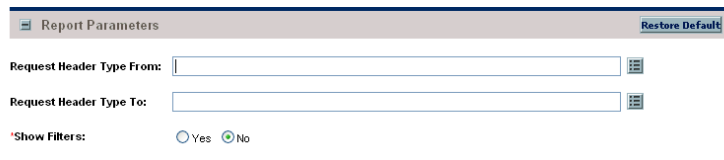
| Field Name (*Required) | Description |
|--------------------------|--|
| Report From | Starting report type. The report will include the report types with names that, alphabetically, start with the selected report name and include later names for those report types that are available on your PPM Center instance. |
| Report To | Ending report type. The report will include the report types with names that, alphabetically, start with the selected report name and include earlier names for those report types that are available on your PPM Center instance. |
| *Show Parameters | Indicate whether to show the parameters and validations. |
| *Show Commands | Indicate whether to show the commands and command steps. |
| *Expand Special Commands | Indicate whether to expand user-defined special commands. |
| *Show Security | Indicate whether to show security groups. |

Request Header Type Detail Report

The Request Header Type Detail report lists detailed definitional information for request header types. You can use this report to audit request header definitions, and to help debug problems with requests that use a given request header type. The report also displays information about the filters selected for the **Assigned To**, **Assigned To Group**, and **Contacts** fields.

To run the Request Header Type Detail report, you must have the Configuration license.

Figure 3-9. Request Header Type Detail report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. Below the title bar, there are three input fields: "Request Header Type From:" with a text input box and a help icon; "Request Header Type To:" with a text input box and a help icon; and "*Show Filters:" with two radio buttons, "Yes" and "No", where "No" is selected.

Table 3-9. Request Header Type Detail report field descriptions

| Field Name (*Required) | Description |
|--------------------------|--|
| Request Header Type From | Select the starting request header type. The report will include only request header types whose names are equal to or greater than this value for those request header types available on your PPM Center instance. |
| Request Header Type To | Select the ending request header type. The report will include only request header types whose names are equal to or less than this value for those request header types available on your PPM Center instance. |
| *Show Filters | Option to show information about field filters. |

Request Type Detail Report

The Request Type Detail report lists the following definitional information for request types:

- All custom fields for the request type
- All statuses that the request type can have
- Commands the request type has, if any
- Security groups whose members can create requests of a specific type
- Workflows that can be assigned to a specific request type

You can use the Request Type Detail report to audit the definitional information and to obtain information that can help you to debug problems associated with requests of a given request type. To run the report, you must have the Configuration license.

Figure 3-10. Request Type Detail report fields

The screenshot shows a configuration window titled "Report Parameters" with a "Restore Default" button in the top right corner. The interface includes the following fields and options:

- Request Type From:** An empty text input field with a dropdown arrow on the right.
- Request Type To:** An empty text input field with a dropdown arrow on the right.
- Show Fields:** Radio buttons for Yes (selected) and No.
- Show Statuses:** Radio buttons for Yes and No (selected).
- Show Rules:** Radio buttons for Yes (selected) and No.
- Show Commands:** Radio buttons for Yes and No (selected).
- Show Status Dependencies:** Radio buttons for Yes and No (selected).
- Expand Special Commands?:** Radio buttons for Yes and No.
- Show Workflows:** Radio buttons for Yes and No (selected).
- Show User Access:** Radio buttons for Yes and No (selected).
- Show Help Content?:** Radio buttons for Yes and No.
- Show Default Display Columns:** Radio buttons for Yes and No.

Table 3-10. Request Type Detail report field descriptions

| Field Name (*Required) | Description |
|-------------------------------|---|
| Request Type From | Select the starting request type. The report will include only request types whose names are equal to or greater than this value for those request types available on your PPM Center instance. |
| Request Type To | Select the ending request type. The report will include only request types whose names are equal to or less than this value for those request types available on your PPM Center instance. |
| *Show Fields | Option to show the fields and validations. |
| *Show Statuses | Option to show the linked request statuses. |
| *Show Rules | Option to show the default rules. |
| *Show Commands | Option to show the commands and command steps. |
| *Show Status Dependencies | Option to show the status dependencies. |
| *Expand Special Commands | Option to expand user-defined special commands. |
| *Show Workflows | Option to show the workflows that can be selected for this request type. |
| *Show User Access | Option to show the detailed security access rules. |
| *Show Help Content | Option to show the help content. |
| *Show Default Display Columns | Option to show the default display columns specified in the request listing portlets. |

Run Field Security Denormalization Report

The Run Field Security Denormalization report runs field level security-related denormalization tasks for particular entities. To run the Run Field Security Denormalization report, you must have the Configuration license.

Figure 3-11. Run Field Security Denormalization report fields

The screenshot shows a web interface titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields:

- Request Type:** A text input field with a help icon.
- Request Header Type:** A text input field with a help icon.
- User Data Context:** A dropdown menu.
- Contact:** A text input field with a help icon.
- Entity State:** A dropdown menu currently showing "Active".

Table 3-11. Run Field Security Denormalization report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| Request Type | Select a request type from the request types available on your PPM Center instance. |
| Request Header Type | Select a request header type from the request header types available on your PPM Center instance. |
| User Data Context | Select a user data context from the user data available on your PPM Center instance. |
| Contact | Select a contact from the contacts available on your PPM Center instance. |
| *Entity State | Select one of the following states: <ul style="list-style-type: none">• Active• All• Closed |

Run PPM Organization Unit Interface Report

This report runs the Organization Unit Open Interface. It validates and imports data from the organization unit interface tables or an LDAP server into the standard PPM Center organization data model.

To run the PPM Organization Unit Interface report, users must have a User Administration license.

For more information about this report, see the *Open Interface Guide and Reference*.

Run PPM Package Interface Report

This report validates and loads package data from the package open interface tables into the standard HP Deployment Management data model.

To run the PPM Package Interface report, users must have a Configuration license.

For more information about this report, see the *Open Interface Guide and Reference*.

Run Workflow Transaction Interface Report

This report validates and runs workflow transactions based on data in the workflow open interface tables.

Use this report to start process steps from outside the PPM Center end-user screens.

To run the Workflow Transaction Interface report, users must have a Configuration license.

For more information about this report, see the *Open Interface Guide and Reference*.

SOX - Security Change Report

This report provides the history of security changes.

This report can be submitted and viewed by all users having the System: Submit Report access grant.

Figure 3-12. SOX - Security Change report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and options:

- User Name:** A text input field with a search icon on the right.
- Security Group:** A text input field with a search icon on the right.
- From:** A date input field with a calendar icon on the right.
- To:** A date input field with a calendar icon on the right.
- Show User Security Group Changes?** Radio buttons for "Yes" (selected) and "No".
- Show Security Access Grant Changes?** Radio buttons for "Yes" (selected) and "No".

Table 3-12. SOX - Security Change report field descriptions

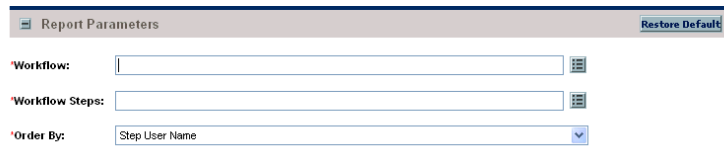
| Field Name | Description |
|------------------------------------|---|
| User Name | Select one or more user names from the users on your PPM Center instance. |
| Security Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| From | Select the starting date. The report will include only changes that occurred on or after this date. |
| To | Select the ending date. The report will include only changes that occurred on or before this date. |
| Show User Security Group Changes | Option to show changes to security groups. |
| Show Security Access Grant Changes | Option to show changes to access grants. |

SOX - Security Validation Report

This report lists users with multiple roles through security groups linked to workflow steps.

This report can be submitted and viewed by all users having the System: Submit Report access grant.

Figure 3-13. SOX - Security Validation report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains three fields: "Workflow:" with a text input field and a search icon; "Workflow Steps:" with a multi-select list box and a search icon; and "Order By:" with a dropdown menu currently showing "Step User Name".

Table 3-13. SOX - Security Validation report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| *Workflow | Select a workflow. |
| *Workflow Steps | Select one or more workflow steps associated with Workflow . |
| *Order By | Select the sort criteria. Choices include: <ul style="list-style-type: none">• Step User Name• Step Name• Security Group Name |

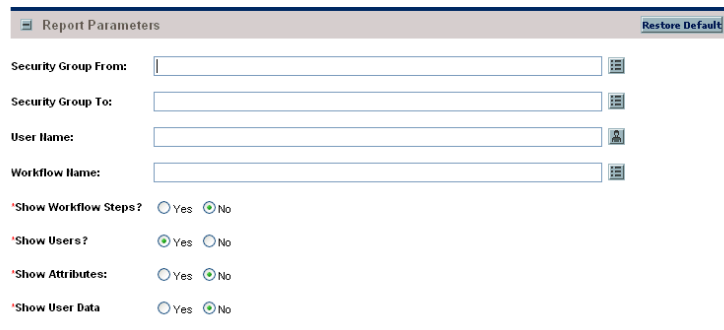
Security Group Detail Report

This report lists definitional information for one or more security groups. This report lists:

- Which users belong to the group
- What workflow steps the security group has access to
- Other information such as what screens the users in the security group will have update access to
- Which transactional entities (requests, packages, projects, or tasks) can use a security group's information in its search fields
- Which request types that members of a designated security group are allowed to create.

To run the Security Group Detail report, users must have a User Administration license.

Figure 3-14. Security Group Detail report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and options:

- Security Group From:** A text input field with a search icon on the right.
- Security Group To:** A text input field with a search icon on the right.
- User Name:** A text input field with a search icon on the right.
- Workflow Name:** A text input field with a search icon on the right.
- Show Workflow Steps?** Radio buttons for Yes and No, with No selected.
- Show Users?** Radio buttons for Yes and No, with Yes selected.
- Show Attributes:** Radio buttons for Yes and No, with No selected.
- Show User Data** Radio buttons for Yes and No, with No selected.

Table 3-14. Security Group Detail report field descriptions

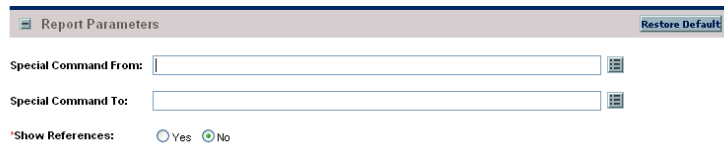
| Field Name (*Required) | Description |
|------------------------|---|
| Security Group From | Select the starting security group. The report will include only security groups whose names are equal to or greater than this value for those security groups available on your PPM Center instance. |
| Security Group To | Select the ending security group. The report will include only security groups whose names are equal to or less than this value for those security groups available on your PPM Center instance. |
| User Name | Select a user name from the users available on your PPM Center instance. |
| Workflow Name | Select a workflow from the workflows available on your PPM Center instance. |
| *Show Workflow Steps | Option to show all the workflow steps. |
| *Show Users | Option to show all users in the security group. |
| *Show Attributes | Option to show entity types that can use this security group's information in its search fields. |
| *Show User Data | Option to show user data custom fields. |

Special Command Detail Report

This report provides details for a command (special command), or a range of commands.

This report can be submitted and viewed by all users having the System: Submit Report access grant.

Figure 3-15. Special Command Detail report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link. It contains three input fields: "Special Command From:" and "Special Command To:" are text boxes with dropdown arrows; "*Show References:" is a radio button group with "Yes" and "No" options, where "No" is selected.

Table 3-15. Special Command Detail report field descriptions

| Field Name (*Required) | Description |
|------------------------|--|
| Special Command From | Select the starting special command. The report will include only special commands whose names are equal to or greater than this value for the special commands available on your PPM Center instance. |
| Special Command To | Select the ending special command. The report will include only special commands whose names are equal to or less than this value for the special commands available on your PPM Center instance. |
| *Show References | Option to show entities that refer to the special commands. |

Synchronize Meta Layer Report

This report assesses or synchronizes the Reporting Meta Layer (RML).

To run the Synchronize Meta Layer report, users must have a Configuration license.

Figure 3-16. Synchronize Meta Layer report fields

Table 3-16. Synchronize Meta Layer report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| *Action | Select an action from the actions available on your PPM Center instance. |
| *Scope | Select a scope. Choices include: <ul style="list-style-type: none"> • Entire Meta Layer. To include all of the RML. • Specific View. To limit the Action to a specific view. • Specific Template. To limit the Action to a specific template. |
| View Name | Select a Meta Layer view name from the views available on your PPM Center instance. This field is enabled only if Specific View is selected in the Scope field. |
| Template File Name | Select a Meta Layer template name from the templates available on your PPM Center instance. This field is enabled only if Specific Template is selected in the Scope field. |

User Data Detail Report

This report displays the definition of the custom user data field (for example, fields on entities like packages, requests, workflows, and security groups). The report is grouped by entity and lists all the custom fields for each entity, as well as the validations that the fields reference.

To run the User Data Detail report, users must have a Configuration license.

Figure 3-17. User Data Detail report fields

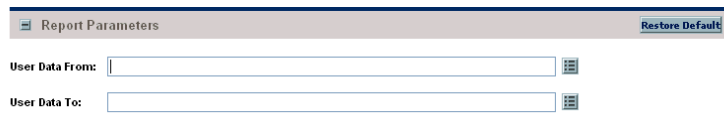
The image shows a web interface for report parameters. At the top, there is a header bar with the text "Report Parameters" on the left and "Restore Default" on the right. Below the header, there are two input fields. The first is labeled "User Data From:" and the second is labeled "User Data To:". Each input field has a small icon to its right, likely representing a dropdown or search function.

Table 3-17. User Data Detail report field descriptions

| Field Name | Description |
|----------------|--|
| User Data From | Select the starting user data. The report will include only user data whose names are equal to or greater than this value for the user data available on your PPM Center instance. |
| User Data To | Select the ending user data. The report will include only user data whose names are equal to or less than this value for the user data available on your PPM Center instance. |

User Detail Report

This report lists the users who have been defined in the PPM Center system, as well as the security groups attached to each user.



This report also appears in the Resource Management category.

To run the User Detail report, users must have a User Administration license.

Figure 3-18. User Detail report fields

Report Parameters Restore Default

Last Name From:

Last Name To:

User:

Security Group:

Organization Unit:

Show Cascading Members? Yes No

Role:

Product License:

Access to Workflow:

Include Disabled? Yes No

Show Resource Information? Yes No

Show Security? Yes No

Show Org Units? Yes No

Show User Data? Yes No

Report Title:

Table 3-18. User Detail report field descriptions (page 1 of 2)

| Field Name | Description |
|----------------|---|
| Last Name From | Specify the starting last name. The report will include only users whose last names are equal to or greater than this value. Type any alphanumeric string (up to 200 characters in length). |
| Last Name To | Specify the ending last name. The report will include only users whose last names are equal to or less than this value. Type any alphanumeric string (up to 200 characters in length). |

Table 3-18. User Detail report field descriptions (page 2 of 2)

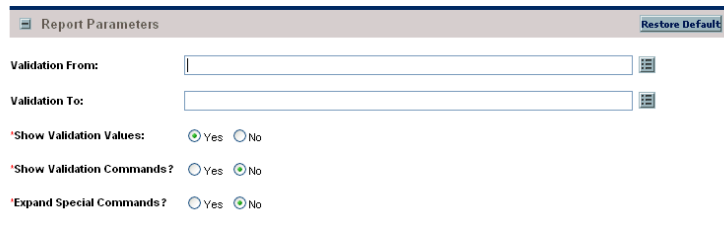
| Field Name | Description |
|---------------------------|--|
| User | Select one or more user IDs from the users on your PPM Center instance. |
| Security Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Organization Unit | Select one or more organization units from the organization units available on your PPM Center instance. |
| Show Cascading Members | Option to show child organizations. |
| Role | Select one or more roles from the roles available on your PPM Center instance. |
| Product License | Select one or more product licenses from the licenses available on your PPM Center instance. |
| Access to Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Include Disabled | Option to include disabled users. |
| Show Resource Information | Option to include additional resource information (for example, skills, capacity, or direct manager). |
| Show Security | Option to show security group memberships. |
| Show Org Units | Option to show organization unit memberships. |
| Show User Data | Option to show the user data custom fields. |
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |

Validations Report

This report provides information about the various custom validations that have been specified, as well as those that are standard with PPM Center products.

To run the Validations report, users must have a Configuration license.

Figure 3-19. Validations report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains five fields: "Validation From" and "Validation To" are text input fields; "*Show Validation Values:" has radio buttons for "Yes" (selected) and "No"; "*Show Validation Commands?" has radio buttons for "Yes" and "No" (selected); and "*Expand Special Commands?" has radio buttons for "Yes" and "No" (selected).

Table 3-19. Validations report field descriptions

| Field Name (*Required) | Description |
|---------------------------|---|
| Validation From | Select the starting validation. The report will include only validations whose names are equal to or greater than this value for those validations available on your PPM Center instance. |
| Validation To | Select the ending validation. The report will include only validations whose names are equal to or less than this value for those validations available on your PPM Center instance. |
| *Show Validation Values | Option to show the values for those validations that rely on a list of values. |
| *Show Validation Commands | Option to show the values for those validations that rely on a list of command. |
| *Expand Special Commands | Option to expand the user-defined special commands for any validations using special commands. |

Workflow Detail Report

This report provides detailed configuration information about specific workflows or sets of workflows. Information includes all steps in the workflow, all transitions in and out of each workflow step, possible results of each step, and all notifications attached to the workflow.



Use this report both as an audit of the workflow business process definition, as well as a tool to analyze those business processes.

To run the Workflow Detail report, users must have a Configuration license.

Figure 3-20. Workflow Detail report fields

Report Parameters Restore Default

Workflow From:

Workflow To:

*Show Valid Results: Yes No

*Show Transitions: Yes No

*Show Security?: Yes No

*Show Notifications?: Yes No

*Show User Data: Yes No

*Show Subworkflows?: Yes No

*Show Workflow Step Commands?: Yes No

*Expand Special Commands?: Yes No

*Show Filters: Yes No

Table 3-20. Workflow Detail report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Workflow From | Select the starting workflow. The report will include only workflows whose names are equal to or greater than this value for those workflows that are available on your PPM Center instance. |
| Workflow To | Select the ending workflow. The report will include only workflows whose names are equal to or less than this value for those workflows that are available on your PPM Center instance. |

Table 3-20. Workflow Detail report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------------|---|
| *Show Valid Results | Option to show the valid result values for each workflow step. |
| *Show Transitions | Option to show the transitions in and out of each workflow step. |
| *Show Security | Option to show the security groups that have access to act on each workflow step. |
| *Show Notifications | Option to show the notifications attached to each workflow step. |
| *Show User Data | Option to show the user data custom fields. |
| *Show Subworkflows | Option to show subworkflows. |
| *Show Workflow Step Commands | Option to show the workflow step commands if a step is a command execution step. |
| *Expand Special Commands | Option to expand user-defined special commands. |
| *Show Filters | Option to show information about field filtering for Deployment Management header fields. |

Workflow Statistics Report

Given a date range and a workflow (or a range of workflows), this report provides statistical information regarding workflow usage—for example:

- How many times the workflow was used compared to the total number of packages or requests
- Average, minimum, and maximum completion time for packages/requests using this workflow within the date range
- For each workflow step, the percentage that the step is traversed of the total packages/requests within that workflow

- For each workflow step, the average, minimum, and maximum completion times
- For each workflow step, the breakdown of the results and transitions that lead out of the step

To run the Workflow Statistics report, users must have a Configuration license.

Figure 3-21. Workflow Statistics report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right. The form contains the following fields and options:

- *Txn Start Date:** A text input field with a calendar icon.
- *Txn End Date:** A text input field with a calendar icon.
- *Workflow Scope:** A dropdown menu.
- Workflow From:** A text input field with a list icon.
- Workflow To:** A text input field with a list icon.
- *Show Steps:** Radio buttons for "Yes" (selected) and "No".
- *Show Transitions:** Radio buttons for "Yes" and "No" (selected).

Table 3-21. Workflow Statistics report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| *Txn Start Date | Select the starting date. The report will include only transactions started on or after this date. |
| *Txn End Date | Select the ending date. The report will include only transactions started on or before this date. |
| *Workflow Scope | Select a scope from the workflow scopes available on your PPM Center instance. |
| Workflow From | Select the starting workflow. The report will include only workflows whose names are equal to or greater than this value for those workflows that are available on your PPM Center instance. |
| Workflow To | Select the ending workflow. The report will include only workflows whose names are equal to or less than this value for those workflows that are available on your PPM Center instance. |

Table 3-21. Workflow Statistics report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| *Show Steps | Option to show the statistical analysis for individual workflow steps. |
| *Show Transitions | Option to show the statistical analysis of the transaction history for each workflow. |

4 Deployment Management Reports

Compare Custom Database Setup Report

The Compare Custom Database report compares database objects in separate database schemas. Objects to be compared are defined in the tables KENV_OBJECTS and KENV_OBJECT_ATTRIBUTES. These tables include HP-supplied objects that compare two separate PPM Center entities across two PPM Center schemas:

- Commands (also called special commands)
- Object types
- Request header types
- Request types
- Security groups
- User data
- Validations
- Workflows
- Workflow step sources (in the execution and decision categories)

Custom comparison entities enable the comparison of actual data within a database, as well as within the data model. Custom entities can be generated for both Oracle and SQL Server.

You can apply a filter to each of the entities. You can view all the entities in the category along with their associated attributes, or view only the entities and attributes that contain differences. To run the Compare Custom Database report, you must define an environment or application code for each schema. In addition, you must have a Deployment Management license.

Figure 4-1. Compare Custom Database Setup report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right. The form contains the following fields:

- Comparison Name: A single-line text input field.
- Reference Environment: A dropdown menu with a list icon.
- Compared Environment: A dropdown menu with a list icon.
- Reference AppCode: A dropdown menu with a list icon.
- Compared AppCode: A dropdown menu with a list icon.
- Only Report Differences: Two radio buttons labeled "Yes" and "No".
- Object 1: A dropdown menu with a list icon.
- Object 1 Filter: A single-line text input field.
- Object 2: A dropdown menu with a list icon.
- Object 2 Filter: A single-line text input field.
- Object 3: A dropdown menu with a list icon.
- Object 3 Filter: A single-line text input field.
- Object 4: A dropdown menu with a list icon.
- Object 4 Filter: A single-line text input field.
- Object 5: A dropdown menu with a list icon.
- Object 5 Filter: A single-line text input field.

Table 4-1. Compare Custom Database Setup report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Comparison Name | Type a unique name for the report (200 characters maximum). |
| *Reference Environment | Select a reference environment from the environments available on your PPM Center instance. |
| *Compared Environment | Select an environment available on your PPM Center instance to compare to the reference environment you selected. |
| Reference AppCode | Select an application code available on your PPM Center instance to be used to override the parameters for the reference environment. |
| Compared AppCode | From the application codes available on your PPM Center instance, select one to be used to override the parameters for the compared environment. |

Table 4-1. Compare Custom Database Setup report field descriptions
(page 2 of 2)

| Field Name (*Required) | Description |
|-------------------------|--|
| Only Report Differences | Option to display only the differences between the two environments. |
| *Object 1 Object 2–5 | Select the custom SQL Server or Oracle objects from those objects available on your PPM Center instance. |
| Object 1–5 Filter | Type the values for the selected objects (200 characters maximum). |

Compare Filesystem Environments Report

The Compare Filesystem Environments report compares the files and file structures of two machines. To run the report, you must first define an environment or application code for each machine. The file system can be any for which an environment is defined; this means that you can compare a Windows file system with a UNIX file system, or compare different types of UNIX file systems with one another.

The Compare Filesystem Environments report options enable you to do the following:

- Override the base path during the report run.
- View all the files and directories, or only those that differ.
- Perform owner, permissions, or content comparisons, or perform all three types of comparisons.
- Include or exclude certain file types and directory names.

To run the Compare Filesystem Environments report, you must have a Deployment Management license.

Figure 4-2. Compare Filesystem Environments report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right. The form is organized into two columns. The left column contains: "Comparison Name" (text input), "*Reference Environment" (dropdown), "Reference AppCode" (dropdown), "Reference Tier" (dropdown), "Only Report Differences:" (radio buttons for Yes/No), "Use Entered Base Paths:" (radio buttons for Yes/No), "Reference Base Path" (text input), "Compare Content:" (radio buttons for Yes/No), "Compare Permissions:" (radio buttons for Yes/No), "Directory Choice:" (dropdown set to "Include All Except"), and four "Directory" fields (1-4). The right column contains: "*Compared Environment" (dropdown), "Compared AppCode" (dropdown), "Compared Tier" (dropdown), "Examine Subdirectories:" (radio buttons for Yes/No), "Compared Base Path" (text input), "Compare Owners:" (radio buttons for Yes/No), "File Type Choice:" (dropdown set to "Include All Except"), and four "File Type" fields (1-4).

Table 4-2. Compare Filesystem Environments report field descriptions (page 1 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Comparison Name | Type a unique report name (up to 200 characters). |
| *Reference Environment | Select a reference environment from the environments available on your PPM Center instance. |
| *Compared Environment | From the environments available on your PPM Center instance, select an environment to compare with the reference environment you selected. |
| Reference AppCode | From the application codes available on your PPM Center instance, select the application code to use to override the parameters for the reference environment. |

Table 4-2. Compare Filesystem Environments report field descriptions
(page 2 of 3)

| Field Name (*Required) | Description |
|-------------------------|--|
| Compared AppCode | Select the application code to be used to override the parameters for the compared environment from those application codes available on your PPM Center instance. |
| *Reference Tier | Select one of the following: <ul style="list-style-type: none"> • Server • Client |
| *Compared Tier | Select one of the following: <ul style="list-style-type: none"> • Server • Client |
| Only Report Differences | Indicate whether to display only the differences between the two environments. |
| Use Entered Base Paths | Indicate whether to use the base paths specified in Reference Base Path and Compared Base Path . |
| Examine Subdirectories | Indicates whether to include subdirectories. |
| Reference Base Path | Type the base path for the reference environment (200 characters maximum). |
| Compared Base Path | Type the base path for the compared environment (200 characters maximum). |
| Compare Content | Indicate whether to compare the contents of each file. |
| Compare Owners | Indicate whether to compare the ownership of each file, including directories. |
| Compare Permissions | Indicate whether to compare the permissions of each file, including directories. |

Table 4-2. Compare Filesystem Environments report field descriptions
(page 3 of 3)

| Field Name (*Required) | Description |
|------------------------|---|
| *Directory Choice | <p>To specify which directories to include, select one of the following:</p> <ul style="list-style-type: none"> • Include All Except. Include all directories except for those specified in Directory 1–4. • Exclude All Except. Exclude all directories except for those specified in Directory 1–4. |
| *File Type Choice | <p>To specify the file types to include, select one of the following:</p> <ul style="list-style-type: none"> • Include All Except. Include all file types except for those specified in File Type 1–4. • Exclude All Except. Exclude all file types except for those specified in File Type 1–4. |
| Directory 1–4 | Type the directories associated with Directory Choice (200 characters maximum). |
| File Type 1–4 | Type the file types associated with File Type Choice (200 characters maximum). |



For best results, define the base paths using absolute paths.

Compare MS SQL Server 7 Environments Report

Use the Compare MS SQL Server 7 Environments report to compare the data model of two SQL Server Version 7 databases. The report can compare tables, views, procedures, and triggers. You can specify a unique filter for each category. Users can either view all the objects in the category along with their associated attributes, or view only the objects and attributes that differ. To run the report, you must define an environment or application code for each PPM Center database schema.

To run the Compare MS SQL Server 7 Environments report, you must have a Deployment Management license.

Figure 4-3. Compare MS SQL Server 7 Environments report fields

The screenshot shows a 'Report Parameters' dialog box with the following fields and options:

- Comparison Name:** A text input field.
- *Reference Environment:** A dropdown menu.
- *Compared Environment:** A dropdown menu.
- Reference AppCode:** A dropdown menu.
- Compared AppCode:** A dropdown menu.
- Only Report Differences:** Radio buttons for 'Yes' and 'No'.
- Compare Tables:** Radio buttons for 'Yes' and 'No'.
- Compare Views:** Radio buttons for 'Yes' and 'No'.
- Compare Procedures:** Radio buttons for 'Yes' and 'No'.
- Compare Triggers:** Radio buttons for 'Yes' and 'No'.
- Table Filter:** A text input field.
- View Filter:** A text input field.
- Procedure Filter:** A text input field.
- Trigger Filter:** A text input field.

Table 4-3. Compare Custom Database Setup report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| Comparison Name | Type a unique name for the report (200 characters maximum). |
| *Reference Environment | Select a reference environment, the first environment, from the environments available on your PPM Center instance. |
| *Compared Environment | Select the second environment from the environments available on your PPM Center instance. |

Table 4-3. Compare Custom Database Setup report field descriptions
(page 2 of 2)

| Field Name (*Required) | Description |
|-------------------------|--|
| Reference AppCode | Select an application code to be used to override the parameters for the reference environment from the application codes available on your PPM Center instance. |
| Compared AppCode | Select an application code to be used to override the parameters for the compared environment from the application codes available on your PPM Center instance. |
| Only Report Differences | Option to show only the differences between the two environments. |
| Compare Tables | Option to compare tables. |
| Table Filter | Specify a table. Type any alphanumeric string (up to 200 characters in length). |
| Compare Views | Option to compare views. |
| View Filter | Specify a view. Type any alphanumeric string (up to 200 characters in length). |
| Compare Procedures | Option to compare procedures. |
| Procedure Filter | Specify a procedure. Type any alphanumeric string (up to 200 characters in length). |
| Compare Triggers | Option to compare triggers. |
| Trigger Filter | Specify a trigger. Type any alphanumeric string (up to 200 characters in length). |

Compare Oracle Environments Report

The Compare Oracle Environments report compares the data model of two Oracle schemas. The report can compare the following information:

- Functions
- Grants
- Indexes
- Packages
- Procedures
- Sequences
- Synonyms
- Tables
- Triggers
- Views

You can specify a unique filter for each category. Users can either view all objects in the category along with their associated attributes, or view only the objects and attributes that contain differences.

To run the Compare Oracle Environments report, you must first define an environment or application code for each schema in PPM Center. You must also have a Deployment Management license.

Figure 4-4. Compare Oracle Environments report fields

Table 4-4. Compare Oracle Environments report field descriptions (page 1 of 3)

| Field Name (*Required) | Description |
|------------------------|---|
| Comparison Name | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Reference Environment | Select a reference environment, the first environment, from the environments available on your PPM Center instance. |
| *Compared Environment | Select the second environment from the environments available on your PPM Center instance. |
| Reference AppCode | Select the application code to be used to override the parameters for the reference environment from the application codes available on your PPM Center instance. |

Table 4-4. Compare Oracle Environments report field descriptions (page 2 of 3)

| Field Name (*Required) | Description |
|-------------------------|---|
| Compared AppCode | Specify the application code to be used to override the parameters for the compared environment from the application codes available on your PPM Center instance. |
| Only Report Differences | Option to display only the differences between the two environments. |
| Compare Tables | Option to compare tables. |
| Table Filter | Specify a table. Type any alphanumeric string (up to 200 characters in length). |
| Compare Sequences | Option to compare sequences. |
| Sequence Filter | Specify a sequence. Type any alphanumeric string (up to 200 characters in length). |
| Compare Indexes | Option to compare indexes. |
| Index Filter | Specify an index. Type any alphanumeric string (up to 200 characters in length). |
| Compare Views | Option to compare views. |
| View Filter | Specify a view. Type any alphanumeric string (up to 200 characters in length). |
| Compare Packages | Option to compare packages. |
| Package Filter | Specify a package. Type any alphanumeric string (up to 200 characters in length). |
| Compare Procedures | Option to compare procedures. |
| Procedure Filter | Specify a procedure. Type any alphanumeric string (up to 200 characters in length). |
| Compare Functions | Option to compare functions. |
| Function Filter | Specify a function. Type any alphanumeric string (up to 200 characters in length). |
| Compare Triggers | Option to compare triggers. |

Table 4-4. Compare Oracle Environments report field descriptions (page 3 of 3)

| Field Name (*Required) | Description |
|------------------------|---|
| Trigger Filter | Specify a trigger. Type any alphanumeric string (up to 200 characters in length). |
| Compare Synonyms | Option to compare synonyms. |
| Synonym Filter | Specify a synonym. Type any alphanumeric string (up to 200 characters in length). |
| Compare Grants | Option to compare grants. |
| Grant Filter | Specify a grant. Type any alphanumeric string (up to 200 characters in length). |

Distribution Detail Report

The Distribution Detail report lists the contents and results of a distribution. The collected information provides a high-level view of a distribution, and can be useful in analyzing execution results.

To run the Distribution Detail report, you must have a Deployment Management license.

Figure 4-5. Distribution Detail report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and options:

- Distribution From:** A text input field with a search icon on the right.
- Distribution To:** A text input field with a search icon on the right.
- Release:** A text input field with a search icon on the right.
- Transaction Date From:** A date input field with a calendar icon on the right.
- Transaction Date To:** A date input field with a calendar icon on the right.
- *Include Closed Distributions:** Radio buttons for "Yes" and "No", with "No" selected.
- *Show Package Level Subworkflow Steps:** Radio buttons for "Yes" and "No", with "No" selected.
- *Order By:** A dropdown menu.

Table 4-5. Distribution Detail report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Distribution From | Select the starting distribution. The report will include only distributions whose names are equal to or greater than this value for those distributions that are available on your PPM Center instance. |
| Distribution To | Select the ending distribution. The report will include only distributions whose names are equal to or less than this value for those distributions that are available on your PPM Center instance. |
| Release | Select a release from the product releases available on your PPM Center instance. |
| Transaction Date From | Select the starting date. The report will include only transactions started on or after this date. |
| Transaction Date To | Type a valid end date. The report will include only transactions started on or before this date. |

Table 4-5. Distribution Detail report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|---------------------------------------|---|
| *Include Closed Distributions | Indicate whether to include closed distributions. |
| *Show Package level Subworkflow Steps | Indicate whether to show subworkflow steps at the package level. |
| *Order By | Select one of the following sort criteria: <ul style="list-style-type: none"> • Distribution Name • Release |

Environment Comparison Report

The Environment Comparison report helps audit environment definitions when different environments (for example, development and production) are similar to each other.

Use this report to compare the definitions of two PPM Center environments for any significant differences. The report queries every field in each environment and lists any values that differ between environment for the same fields. The Environment Comparison report also compares the applications tied to each environment.

To run the Environment Comparison report, users must have a Deployment Management license.

Figure 4-6. Environment Comparison report fields

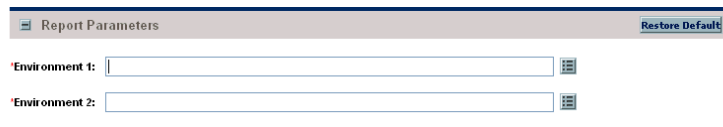
The image shows a web-based form titled "Report Parameters" with a "Restore Default" button in the top right corner. Below the title, there are two input fields. The first is labeled "Environment 1:" and the second is labeled "Environment 2:". Each input field has a small icon to its right, likely representing a dropdown menu or a search function.

Table 4-6. Environment Comparison report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| *Environment 1 | Select an environment from the available environments on your PPM Center instance. |
| *Environment 2 | Select an environment on your PPM Center instance to compare with the first environment you selected. |

Environment Comparison by Objects Migrated Report

Given two environments, the Environment Comparison by Objects Migrated report compares the history of all the objects migrated into each environment (using HP Deployment Management) and lists any differences. These differences include objects migrated into:

- One environment but not the other
- Both environments but at different times

The Environment Comparison by Objects Migrated report uses an internal object inventory table for information on objects migrated to each environment. At the time of execution, the workflow engine uses the workflow definition to determine the environment to which an object is being migrated, and then updates the object inventory table accordingly.



The workflow engine does not recognize any cases where the destination environment is overwritten in the object command while it is being migrated.



This report provides a useful way to compare environments, but compares the environments based on the Deployment Management migrations into that environment. It does not make any comparisons at the file system or database levels.

To run the Environment Comparison by Object Migrated report, users must have a Deployment Management license.

Figure 4-7. Environment Comparison by Objects Migrated report fields

Report Parameters Restore Default

Environment Name 1:

Environment Name 2:

Object Type:

Specific Object:

Include Matches Yes No

Table 4-7. Environment Comparison by Objects Migrated report field descriptions

| Field Name (*Required) | Description |
|-------------------------------|--|
| *Environment Name 1 | Select the first environment from the environments available on your PPM Center instance. |
| *Environment Name 2 | Select the second environment from the environments available on your PPM Center instance. |
| Object Type | Select an object type from the object types available on your PPM Center instance. |
| Specific Object | Select an object from the objects available on your PPM Center instance. |
| *Include Matches | Option to include matches. |

Environment Detail Report

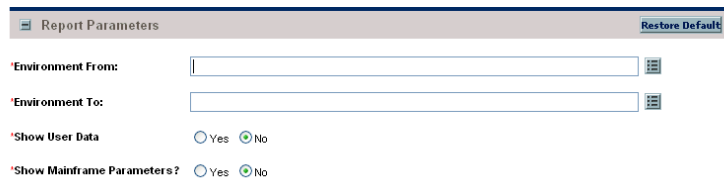
The Environment Detail report Includes the following information:

- Detailed definitions of a given environment or group of environments
- Major attributes of the environments
- Attributes of the applications tied to the environments

Encrypted information (for example, database or operation system passwords) is not displayed. Use this report as a way to textually audit the environment definition.

To run the Environment Detail report, users must have a Deployment Management license.

Figure 4-8. Environment Detail report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link. It contains four fields: "Environment From:" and "Environment To:" are text input fields with dropdown arrows; "*Show User Data" and "*Show Mainframe Parameters?" are radio button options with "Yes" and "No" choices. The "No" options are selected.

Table 4-8. Environment Detail report field descriptions

| Field Name (*Required) | Description |
|----------------------------|--|
| *Environment From | Select the starting environment. The report will include only environments whose names are equal to or greater than this value for those environments available on your PPM Center instance. |
| *Environment To | Select the ending environment. The report will include only environments whose names are equal to or less than this value for those environments available on your PPM Center instance. |
| *Show User Data | Option to show the custom user data fields. |
| *Show Mainframe Parameters | Option to show associated applications. |

Environment Group Detail Report

The Environment Group Detail report contains information about the specified environment groups. Users can specify a range of environment groups using the **Environment Group From** and **Environment Group To** fields. The report output includes the following:

- Header information on an environment group
- Constituent environments of the environment group
- Applications defined for the environment group.

To run the Environment Group Detail report, users must have a Deployment Management license and belong to one or more of the following security groups:

- PPM 6.0 Upgrade Workbench Access
- PPM Administrator
- PPM All Access Grants
- PPM Billing Manager
- PPM Cost Manager
- PPM Demand Management Administrator
- PPM Demand Manager
- PPM Deployment Management Administrator
- PPM Program Manager
- PPM Project Manager
- PPM Resource Manager
- PPM Service Security Group
- PPM Team Manager
- PPM Time Administrator

- PPM Time Manager
- PPM User
- PPM User Admin
- PFM - Finance Review Board
- PFM - IT Steering Committee
- PFM - Standards Committee

Figure 4-9. Environment Group Detail report fields

Table 4-9. Environment Group Detail report field descriptions

| Field Name | Description |
|------------------------|--|
| Environment Group From | Select the starting environment group. The report will include only environment groups whose names are equal to or greater than this value for those environment groups available on your PPM Center instance. |
| Environment Group To | Select the ending environment group. The report will include only environment groups whose names are equal to or less than this value for those environment groups available on your PPM Center instance. |

Environments / Objects Detail Report

This report lists objects that have been migrated into a given environment or set of environments. Use this report as an object inventory for newly-migrated objects.

This report uses an internal object inventory table for information on objects migrated to each environment. At the time of execution, the workflow engine uses the workflow definition to determine the environment an object is being migrated to and updates the object inventory table accordingly.



The workflow engine will not recognize any cases where the destination environment is overwritten in the object command while it is being migrated.



This report is also useful when used to create an object inventory for newly migrated objects.

To run the Environment / Objects Detail report, users must have a Deployment Management license.

Figure 4-10. Environments / Objects Detail report fields

Report Parameters Restore Default

Environment: ⋮

Object Type: ⋮

Migration Date From: 📅

Migration Date To: 📅

Include Prior Migrations Yes No

Table 4-10. Environments / Objects Detail report field descriptions

| Field Name (*Required) | Description |
|---------------------------|--|
| Environment | Select an environment from the environments available on your PPM Center instance. |
| Object Type | Select an object type from the object types available on your PPM Center instance. |
| Migration Date From | Select the starting date. The report will include only migrations started on or after this date. |
| Migration Date To | Select the ending date. The report will include only migrations started on or before this date. |
| *Include Prior Migrations | Option to include objects that were migrated to the same environment more than once. |

Object History Report

This report provides a workflow step transaction history for packages. Use this report to view:

- All transactions matching the selection criteria
- All executions for a given object type and/or a given date range
- If the same object has been migrated or executed by multiple packages

For migration steps, this report uses the workflow definitions to determine when a step occurred and to which environment it was migrated. It looks at completed execution-type workflow steps and the attached destination environment to report the object's final destination environment.



This report will not recognize any cases where the destination environment is overwritten in the object command while it is being migrated.

To run the Object History report, users must have a Deployment Management license.

Figure 4-11. Object History report fields

The screenshot shows a web interface titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and controls:

- Object Type:** A text input field with a list icon on the right.
- Object Name:** A text input field.
- Performed By:** A text input field with a user selection icon on the right.
- Transaction Date From:** A date input field with a calendar icon on the right.
- Transaction Date To:** A date input field with a calendar icon on the right.
- Dest. Environment:** A text input field with a list icon on the right.
- Execution Steps Only?** Radio buttons for "Yes" and "No", with "No" selected.
- Order By:** A dropdown menu.

Table 4-11. Object History report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| Object Type | Select an object type from the object types available on your PPM Center instance. |
| Object Name | Specify an object name. Type any alphanumeric string (up to 40 characters in length). |
| Performed By | Select a user from the users on your PPM Center instance. |
| Transaction Date From | Select the starting date. The report will include only transactions started on or after this date. |
| Transaction Date To | Select the ending date. The report will include only transactions started on or before this date. |
| Dest. Environment | Select a destination environment. Use this option to view all the deployment management activity for a specific environment for those environments available on your PPM Center instance. |
| *Execute Steps Only | Option to show transactions for execution type workflow steps. |
| *Order By | Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Transaction Date • Package Creation Date • Object Name |

Objects / Environments Detail Report

This report lists objects that have been migrated into a given environment or a set of environments, grouping the report output by object type name. Use this report as an object inventory for newly-migrated objects.

This report uses an internal object inventory table for information on objects migrated to each environment. At time of execution, the workflow engine uses the workflow definition to determine the environment an object is being migrated to and updates the object inventory table accordingly.



The workflow engine will not recognize any cases where the destination environment is overwritten in the object command while it is being migrated.



This report is also useful when used to create an object inventory for newly migrated objects.

To run the Objects / Environments Detail report, users must have a Deployment Management license.

Figure 4-12. Objects / Environments Detail report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Defaults" link. It contains the following fields:

- Object Type:** A text input field with a search icon.
- Environment:** A text input field with a search icon.
- Migration Date From:** A date input field with a calendar icon.
- Migration Date To:** A date input field with a calendar icon.
- *Include Prior Migrations:** A radio button group with "Yes" and "No" options. The "No" option is selected.

Table 4-12. Objects / Environments Detail report field descriptions

| Field Name (*Required) | Description |
|---------------------------|--|
| Object Type | Select an object type from the object types available on your PPM Center instance. |
| Environment | Select an environment from the environments available on your PPM Center instance. |
| Migration Date From | Select the starting date. The report will include only migrations started on or after this date. |
| Migration Date To | Select the ending date. The report will include only migrations started on or before this date. |
| *Include Prior Migrations | Option to include objects that were migrated to the same environment more than once. |

Package Change History Report

This report audits the package changes and includes assignment information, line order, and line details for each selected package.

To run the Package Change History report, users must have a Deployment Management license.

Figure 4-13. Package Change History report

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link in the top right. The form contains the following fields and options:

- Package From:** A text input field with a dropdown arrow icon on the right.
- Package To:** A text input field with a dropdown arrow icon on the right.
- Package No. Contains:** A text input field.
- Assigned User:** A text input field with a user selection icon on the right.
- Workflow:** A text input field with a dropdown arrow icon on the right.
- Creation Date From:** A date input field with a calendar icon on the right.
- Creation Date To:** A date input field with a calendar icon on the right.
- Show Package Change History:** Radio buttons for "Yes" (selected) and "No".
- Show Deleted Packages and Package Lines:** Radio buttons for "Yes" and "No" (selected).

Table 4-13. Package Change History field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| Package From | Select the starting package. The report will include only packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance. |
| Package To | Select the ending package. The report will include only packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance. |
| Package No. Contains | Specify a string that must be included in the package number. Type any alphanumeric string (up to 40 characters in length). |
| Assigned User | Select a user from the users on your PPM Center instance. |

Table 4-13. Package Change History field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|--|--|
| Workflow | Select a workflow from the workflows available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only packages created on or after this date. |
| Creation Date To | Select the ending date. The report will include only packages created on or before this date. |
| *Show Package Change History | Option to show the package change history. |
| *Show Deleted Packages and Package Lines | Option to show deleted packages and deleted package lines. |

Package Details Report

Returns details about a given package. Based on the selection criteria, this report lists:

- Individual packages and detailed data regarding each package
- Header information about the package, such as package priority and description
- Detailed information, such as package notes, package lines, and their parameters
- Current workflow status for each package line on each selected package

To run the Package Details report, users must have a Deployment Management license.

Figure 4-14. Package Details report fields

The screenshot shows a 'Report Parameters' form with the following fields and options:

- Package From:** Text input field with a list icon.
- Package To:** Text input field with a list icon.
- Package No. Contains:** Text input field.
- *Include Closed Packages:** Radio buttons for Yes and No (No is selected).
- Requested By:** Text input field with a user selection icon.
- *Show Line Statuses:** Radio buttons for Yes and No (No is selected).
- Assigned To:** Text input field with a user selection icon.
- *Show Line Parameters:** Radio buttons for Yes and No (No is selected).
- Workflow:** Text input field with a list icon.
- *Show Notes:** Radio buttons for Yes and No (No is selected).
- Package Group:** Text input field with a list icon.
- *Show User Data:** Radio buttons for Yes and No (No is selected).
- Creation Date From:** Text input field with a calendar icon.
- *Show Full Header:** Radio buttons for Yes and No (No is selected).
- Creation Date To:** Text input field with a calendar icon.
- *Show References:** Radio buttons for Yes and No (No is selected).

Table 4-14. Package Details report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|--------------------------|---|
| Package From | Select the starting package. The report will include only packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance. |
| Package To | Select the ending package. The report will include only packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance. |
| Package No. Contains | Specify a string that must be included in the package number. Type any alphanumeric string (up to 40 characters in length). |
| *Include Closed Packages | Option to include packages with an overall status of Cancelled, Closed [Success], Closed [Failure], and Closed [Mixed]. |
| Requested By | Select a user from the users on your PPM Center instance. |
| *Show Line Statuses | Option to show the workflow steps and current step status for each package line. |

Table 4-14. Package Details report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Assigned To | Select a user from the users on your PPM Center instance. |
| *Show Line Parameters | Option to show all the visible parameters for each package line. |
| Workflow | Select a workflow from the workflows available on your PPM Center instance. |
| *Show Notes | Option to show the notes. |
| Package Group | Select a package group from the package groups available on your PPM Center instance. |
| *Show User Data | Option to show the user data custom fields. |
| Creation Date From | Select the starting date. The report will include only packages created on or after this date. |
| *Show Full Header | Option to show the full header. |
| Creation Date To | Select the ending date. The report will include only packages created on or before this date. |
| *Show References | Option to show associated references. |

Package History Report

This report lists the complete workflow history for each selected package—for example:

- The status change at each workflow step
- The date and time the status changed
- The person who caused the change
- The new status of that step

The report breaks down each package into its package lines and gives the workflow history separately for each line.

To run the Package History report, users must have a Deployment Management license.

Figure 4-15. Package History report fields

Table 4-15. Package History report field descriptions

| Field Name (*Required) | Description |
|--------------------------|---|
| Package From | Select the starting package. The report will include only packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance. |
| Package To | Select the ending package. The report will include only packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance. |
| Package No. Contains | Specify a string that must be included in the package number. Type any alphanumeric string (up to 40 characters in length). |
| Requested By | Select a user from the users on your PPM Center instance. |
| Assigned To | Select a user from the users on your PPM Center instance. |
| *Include Closed Packages | Option to include packages with an overall status of Cancelled, Closed [Success], Closed [Failure], and Closed [Mixed]. |

Package Impact Analysis Report

Use this report to analyze the impact of a given package based on the audit history stored in PPM Center. After listing summary information on the given package and package lines, the report lists three separate sections for analysis:

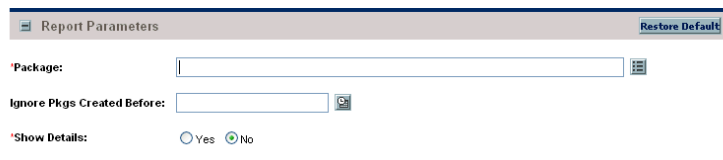
- Other packages that contain common objects with a given package.
- Objects that have migrated alongside one or more of the objects being migrated on the given package, but are not included in the given package.

These objects might be affected by the current object changes (if these objects were once tied to the objects being changed in the same package, there is probably a relationship between the objects).

- Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed.

To run the Package Impact Analysis report, users must have a Deployment Management license.

Figure 4-16. Package Impact Analysis report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains three fields: "Package:" with a text input field and a dropdown arrow; "Ignore Pkgs Created Before:" with a date input field and a calendar icon; and "Show Details:" with two radio buttons, "Yes" and "No", where "No" is selected.

Table 4-16. Package Impact Analysis report field descriptions

| Field Name (*Required) | Description |
|----------------------------|--|
| *Package | Select a package from the packages available on your PPM Center instance. |
| Ignore Pkgs Created Before | Select a date. The report will only include the package if it was created on or after this date. |
| *Show Details | Option to list all the specific common objects between the queried packages and the given package. |

Packages Pending Report

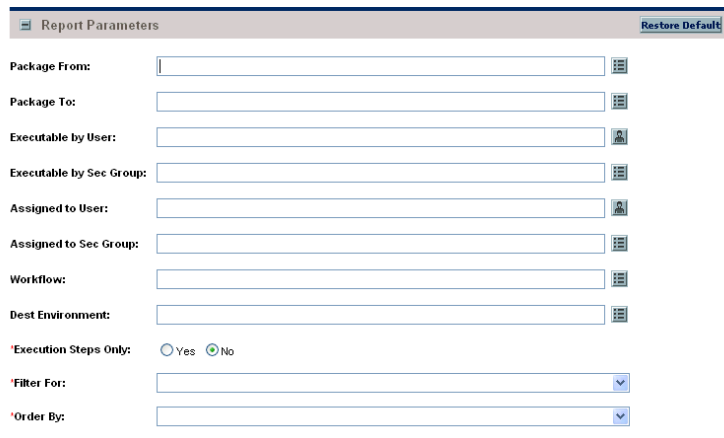
Use this report as a worklist for pending work on packages. Based on the selection criteria, this report lists:

- Open packages with pending activity
- Details about each package
- Pending work for a group of users

Using this information, query the package using HP Deployment Management and perform the appropriate action(s).

To run the Packages Pending report, users must have a Deployment Management license.

Figure 4-17. Packages Pending report fields



The screenshot shows a web-based form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and controls:

- Package From:** A text input field with a search icon on the right.
- Package To:** A text input field with a search icon on the right.
- Executable by User:** A text input field with a search icon on the right.
- Executable by Sec Group:** A text input field with a search icon on the right.
- Assigned to User:** A text input field with a search icon on the right.
- Assigned to Sec Group:** A text input field with a search icon on the right.
- Workflow:** A text input field with a search icon on the right.
- Dest Environment:** A text input field with a search icon on the right.
- Execution Steps Only:** Radio buttons for "Yes" and "No", with "No" selected.
- Filter For:** A dropdown menu.
- Order By:** A dropdown menu.

Table 4-17. Packages Pending report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|-------------------------|--|
| Package From | Select the starting date. The report will include only the packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance. |
| Package To | Select the ending date. The report will include only the packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance. |
| Executable by User | Select a user from the users on your PPM Center instance. |
| Executable by Sec Group | Select a security group from the security groups available on your PPM Center instance. |
| Assigned to User | Select a user from the users on your PPM Center instance. |
| Assigned to Sec Group | Select a security group from the security groups available on your PPM Center instance. |
| Workflow | Select a workflow from the workflows available on your PPM Center instance. |
| Dest Environment | Use this option to determine which packages are ready to migrate to a given environment. Select a destination environment from the environments available on your PPM Center instance. |

Table 4-17. Packages Pending report field descriptions (page 2 of 2)

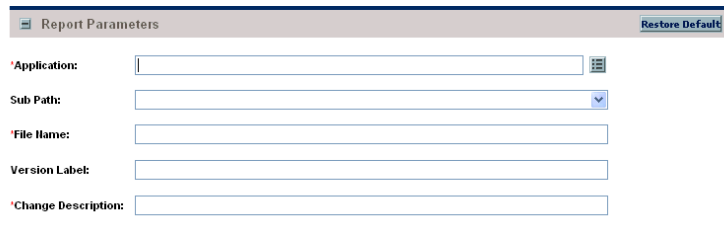
| Field Name (*Required) | Description |
|------------------------|--|
| *Execution Steps Only | <p>Option to select open package lines with an active execution type step with the given destination environment.</p> <p>This is useful when you want to determine which packages are ready to migrate to any environment.</p> |
| *Filter For | <p>Select a filter. Choices include:</p> <ul style="list-style-type: none"> • All Active Steps • Eligible Steps Only • Scheduled Steps Only |
| *Order By | <p>Select the sort criteria. Choices include:</p> <ul style="list-style-type: none"> • Package Number • Step name • Workflow Name |

RCS Check In Report

This is the template of a report used to check files into the RCS repository (if the RCS file management system is being used).

To run the RCS Check In report, users must have a Deployment Management license.

Figure 4-18. RCS Check In report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link in the top right corner. The form contains five input fields: "Application" (a text box with a list icon), "Sub Path" (a dropdown menu), "File Name" (a text box), "Version Label" (a text box), and "Change Description" (a text box).

Table 4-18. RCS Check In report field descriptions

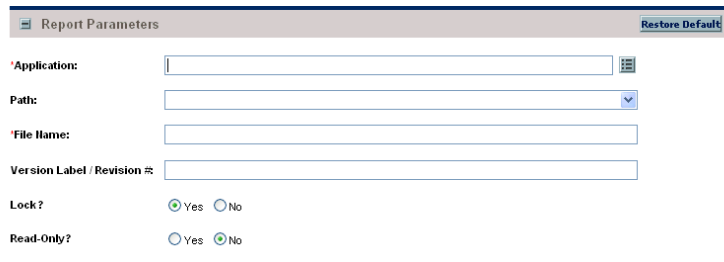
| Field Name (*Required) | Description |
|------------------------|--|
| *Application | Select an associated application from the applications available on your PPM Center instance. |
| Sub Path | Select a check-in path. Choices include: <ul style="list-style-type: none">• forms• bin• srw• scripts• sql• plsql |
| *File Name | Specify the name of the file. Type any alphanumeric string (up to 40 characters in length). |
| Version Label | Specify the version label of the file. Type any alphanumeric string (up to 40 characters in length). |
| *Change Description | Specify the description of the change made to the file. Type any alphanumeric string (up to 200 characters in length). |

RCS Check Out Report

This is the template of a report used to check files out of the RCS repository (if the RCS file management system is being used).

To run the RCS Check Out report, users must have a Deployment Management license.

Figure 4-19. RCS Check Out report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields and options:

- *Application:** A text input field with a list icon on the right.
- Path:** A dropdown menu.
- *File Name:** A text input field.
- Version Label / Revision #:** A text input field.
- Lock?** Radio buttons for Yes (selected) and No.
- Read-Only?** Radio buttons for Yes and No (selected).

Table 4-19. RCS Check Out report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| *Application | Select an associated application from the applications available on your PPM Center instance. |
| Path | Select a check-out path. Choices include: <ul style="list-style-type: none">• forms• bin• srw• scripts• sql• psql |
| *File Name | Specify the name of the file. Type any alphanumeric string (up to 40 characters in length). |

Table 4-19. RCS Check Out report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|-------------------------------|--|
| Version Label / Revision # | Specify the version label of the file. Type any alphanumeric string (up to 40 characters in length). |
| Lock | Option to lock the checked out file. |
| Read-Only | Option to select if the checked-out file should be read-only. |

Release Detail Report

This is a management report that lists all requests, packages, and distributions associated with a release.



This report is also useful when used to determine if everything that should be included with a release has been included, and whether or not there are proper dependencies.

To run the Release Detail report, users must have a Deployment Management license and belong to the appropriate security group.

Figure 4-20. Release Detail report fields

The screenshot shows a web-based form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form is organized into two columns of fields:

- Left Column:**
 - Release From: [Text Input]
 - Release To: [Text Input]
 - Release Contains: [Text Input]
 - Created By: [Text Input]
 - Release Manager: [Text Input]
 - Release Team: [Text Input]
 - Package Group: [Text Input]
 - Description: [Text Input]
 - Creation Date From: [Text Input]
 - Creation Date To: [Text Input]
 - Dist. Creation Date From: [Text Input]
 - Dist. Creation Date To: [Text Input]
- Right Column (Radio Buttons):**
 - *Show Distributions: Yes, No
 - *Show Packages: Yes, No
 - *Show Requests: Yes, No
 - *Show References: Yes, No
 - *Show Notes: Yes, No
 - *Include Closed Releases: Yes, No

Table 4-20. Release Detail report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|--------------------------|--|
| Release From | Select the starting date. The report will include only releases whose names are equal to or greater than this value for those releases that are available on your PPM Center instance. |
| *Show Distributions | Option to show distributions. |
| Release To | Select the ending date. The report will include only releases whose names are equal to or less than this value for those releases that are available on your PPM Center instance. |
| *Show Packages | Option to show packages. |
| Release Contains | Select a release number. Type any alphanumeric string (up to 40 characters in length). |
| *Show Requests | Option to show requests. |
| Created By | Select a user from the users on your PPM Center instance. |
| *Show References | Option to show references. |
| Release Manager | Select a release manager from the users on your PPM Center instance. |
| *Show Notes | Option to show notes. |
| Release Team | Select a release team from the release teams available on your PPM Center instance. |
| *Include Closed Releases | Option to show closed releases. |
| Package Group | Select a package group from the package groups available on your PPM Center instance. |
| Description | Specify a string that must be included in the description. Type any alphanumeric string (up to 200 characters in length). |
| Creation Date From | Select the starting date. The report will include only releases created on or after this date. |

Table 4-20. Release Detail report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|--------------------------|---|
| Creation Date To | Select the ending date. The report will include only releases created on or before this date. |
| Dist. Creation Date From | Select the starting date. The report will include only distributions created on or after this date. |
| Dist. Creation Date To | Select the ending date. The report will include only distributions created on or before this date. |

Release Notes Report

This report shows all the requests and packages in a release, as well as their associations. You can use this report to create a list of bugs fixed and patches applied within a specific release.



This report is also useful when used to create a list of bugs fixed and patches applied within a specific release.

To run the Release Notes report, users must have a Deployment Management license.

Figure 4-21. Release Notes report fields

Table 4-21. Release Notes report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| Release From | Select the starting release. The report will include only releases whose names are equal to or greater than this value for those releases that are available on your PPM Center instance. |
| Show Requests | Option to show requests. |
| Release To | Select the ending release. The report will include only releases whose names are equal to or less than this value for those releases that are available on your PPM Center instance. |
| Show Packages | Option to show packages. |

Table 4-21. Release Notes report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|-------------------------------|--|
| Release Manager | Select a release manager from the users on your PPM Center instance. |
| Show Notes | Option to show notes. |
| Release Team | Select a release team from the release teams available on your PPM Center instance. |
| Update Date From | Select the starting date. The report will include only releases updated on or after this date. |
| Update Date To | Select the ending date. The report will include only releases updated on or before this date. |
| *Include Closed Distributions | Option to show closed distributions. |

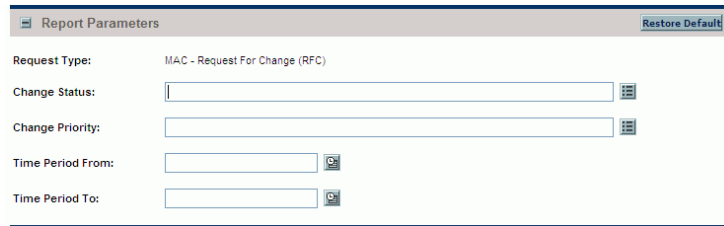
5 Demand Management Reports

ALM - Change Summary Report

Use this report to obtain a list of requests for change (RFCs) that have been implemented, grouped by change category.

To run the ALM - Change Summary report, users must have a Demand Management license.

Figure 5-1. ALM - Change Summary report fields



The screenshot shows a web interface titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields:

- Request Type:** A dropdown menu currently set to "MAC - Request For Change (RFC)".
- Change Status:** A text input field with a list icon on the right.
- Change Priority:** A text input field with a list icon on the right.
- Time Period From:** A date input field with a calendar icon on the right.
- Time Period To:** A date input field with a calendar icon on the right.

Table 5-1. ALM - Change Summary report field descriptions

| Field Name | Description |
|------------------|---|
| Request Type | (Read-only) Preset to ALM - Request For Change (RFC) . |
| Change Status | The status of the change request. |
| Change Priority | The priority of the change request. |
| Time Period From | The earliest date the RFCs were created. |
| Time Period To | The latest date the RFCs were created. |

ALM - Forward Schedule of Changes for RFC Report

This is a key report used in the change management process. The output of this report is a list of all the RFCs that are scheduled to be implemented.

To run the ALM - Forward Schedule of Changes for RFC report, users must have a Demand Management license.

Figure 5-2. ALM - Forward Schedule of Changes for RFC report fields

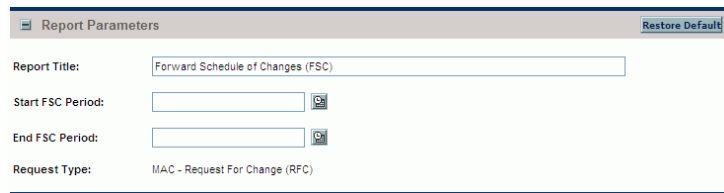


Table 5-2. ALM - Forward Schedule of Changes for RFC report field descriptions

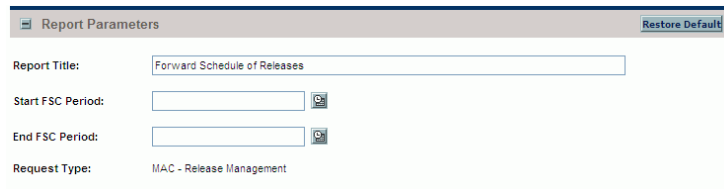
| Field Name | Description |
|------------------|---|
| Report Title | The title of the report. |
| Start FSC Period | The earliest start date of the scheduled RFCs. |
| End FSC Period | The latest start date of the scheduled RFCs. |
| Request Type | (Read-only) Preset to ALM - Request For Change (RFC) . |

ALM - Forward Schedule of Releases Report

This is a key report used in the release management process. The output of this report is a list of all releases that are scheduled to be implemented into the LIVE environment.

To run the ALM - Forward Schedule of Releases report, users must have a Demand Management license.

Figure 5-3. ALM - Forward Schedule of Releases report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains four fields: "Report Title" with the value "Forward Schedule of Releases", "Start FSC Period" and "End FSC Period" which are empty text boxes with calendar icons to their right, and "Request Type" which is a dropdown menu currently showing "MAC - Release Management".

Table 5-3. ALM - Forward Schedule of Releases report field descriptions

| Field Name | Description |
|------------------|--|
| Report Title | The title of the report. |
| Start FSC Period | Searches for releases created after the specified FSC date. |
| End FSC Period | Searches for releases created before the specified FSC date. |
| Request Type | (Read-only) Preset to ALM - Release Management . |

ALM - Release Content Report

This report provides a list of RFCs that have been incorporated into a release.

To run the ALM - Release Content report, users must have a Demand Management license.

Figure 5-4. ALM - Release Content report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains three fields: "Report Title" with the value "Release Content Report", "Request Type" with the value "MAC - Release Management", and "*Release ID" which is currently empty. There is a small icon to the right of the Release ID field.

Table 5-4. ALM - Release Content report field descriptions

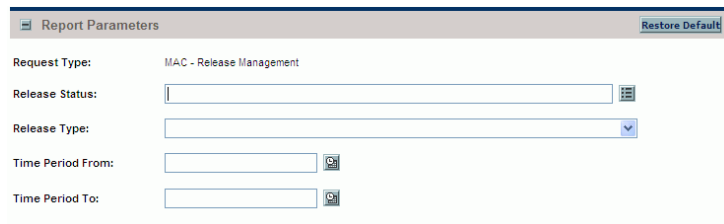
| Field Name | Description |
|--------------|---|
| Report Title | The title of the report. |
| Request Type | (Read-only) Preset to ALM - Release Management . |
| *Release ID | Specify the release whose contents you want to list. |

ALM - Release Summary Report

The ALM - Release Summary report provides a list of releases that have been implemented.

To run the ALM - Release Summary report, users must have a Demand Management license.

Figure 5-5. ALM - Release Summary report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains the following fields:

- Request Type:** A text field containing "MAC - Release Management".
- Release Status:** A text input field with a small grid icon to its right.
- Release Type:** A dropdown menu.
- Time Period From:** A date input field with a calendar icon to its right.
- Time Period To:** A date input field with a calendar icon to its right.

Table 5-5. ALM - Release Summary report field descriptions

| Field Name | Description |
|------------------|--|
| Request Type | (Read-only) Preset to ALM - Release Management . |
| Release Status | Searches for releases with the specified statuses. |
| Release Type | Searches for releases of a specific type. |
| Time Period From | Searches for releases created after the specified date. |
| Time Period To | Searches for releases created before the specified date. |

Contact Detail Report

This report is primarily a request manager tool. Use this report to query the contacts already specified in the Demand Management system that are available for adding and updating requests.

To run the Contact Detail report, users must have a Demand Management license.

Figure 5-6. Contact Detail report fields

Table 5-6. Contact Detail report field descriptions

| Field Name | Description |
|--------------------|--|
| Last Name From | Specify the starting last name. The report will include only contacts whose last names are equal to or greater than this value. Type any alphanumeric string (up to 200 characters in length). |
| Last Name To | Specify the ending last name. The report will include only contacts whose last names are equal to or less than this value. Type any alphanumeric string (up to 200 characters in length). |
| Full Name Contains | Specify a string that must be included in the full name. Type any alphanumeric string (up to 200 characters in length). |
| Email Contains | Specify a string that must be included in the email address. Type any alphanumeric string (up to 200 characters in length). |
| Company Name | Specify one or more companies from the companies available on your PPM Center instance. |
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |

Demand Creation History Report

Use this report to show the history of demand creation for a specified demand set. Demand can be grouped by any of the demand set fields, and further filtered by specific values of those fields.

To run the Demand Creation History report, users must have a Demand Management license.

Figure 5-7. Demand Creation History report fields

Table 5-7. Demand Creation History report field descriptions (page 1 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| *Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Demand Set Name | Select a demand set from the demand sets available on your PPM Center instance. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |

Table 5-7. Demand Creation History report field descriptions (page 2 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Requestor Department | Select a department from the departments available on your PPM Center instance. |
| Priority | Select a priority. Choices include: <ul style="list-style-type: none"> • Low • Normal • High • Critical |
| Assigned to Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Demand Disposition | Select one or more dispositions. Choices include: <ul style="list-style-type: none"> • Satisfied • Backlog • New • Scheduled • Rejected |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| *Demand Grouped By | The report will include only the demand set grouped by this demand field. Choices are limited to demand fields available on your PPM Center instance. |
| *Period Type | Select a time period. Choices include: <ul style="list-style-type: none"> • Months • Weeks |

Table 5-7. Demand Creation History report field descriptions (page 3 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| *Past Periods | Specify the number of historic periods of the type you selected in the Period Type list. Type any integer (in the range of -150 to 150). |
| Demand Field 1–5 | Select these demand fields from the demand fields available on your PPM Center instance. |
| Field Value 1–5 | Select the field values that correspond to the demand fields you selected. Type any alphanumeric string (up to 40 characters in length). This value should exactly match the visible field. For Yes/No options, type Y for yes and N for no. |

Historical SLA Violations Report

Use this report to show the history of SLA violations for a specified demand set. Demand that has violated SLA can be grouped by any of the demand set fields, and further filtered by specific values of those fields.

To run the Historical SLA Violations report, users must have a Demand Management license.

Figure 5-8. Historical SLA Violations report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button. The form contains the following fields:

- Report Title:** Text input field containing "Historical SLA Violations".
- Demand Set Name:** Text input field.
- Request Type:** Text input field.
- Priority:** Dropdown menu.
- Demand Disposition:** Text input field.
- Demand Grouped By:** Text input field.
- Period Type:** Dropdown menu set to "Months".
- Past Periods:** Text input field containing "3".
- Requestor Department:** Dropdown menu.
- Assigned to Group:** Text input field.
- Application:** Text input field.
- Demand Field 1-5:** Five text input fields.
- Field Value 1-5:** Five text input fields.

Table 5-8. Historical SLA Violations report field descriptions (page 1 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| *Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Demand Set Name | Select a demand set from the demand sets available on your PPM Center instance. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |

Table 5-8. Historical SLA Violations report field descriptions (page 2 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Requestor Department | Select a department from the departments available at your site. |
| Priority | Select one or more priorities. Choices include: <ul style="list-style-type: none"> • Low • Normal • High • Critical |
| Assigned to Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Demand Disposition | Select one or more dispositions. Choices include: <ul style="list-style-type: none"> • Satisfied • Backlog • New • Scheduled • Rejected |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| *Demand Grouped By | Select a demand set grouping. Choices are limited to demand fields available on your PPM Center instance. |
| *Period Type | Select a time period. Choices include: <ul style="list-style-type: none"> • Months • Weeks |

Table 5-8. Historical SLA Violations report field descriptions (page 3 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| *Past Periods | Specify the number of historic periods of the type you selected from the Period Type list. Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator). |
| Demand Field 1–5 | Specify these demand fields from the demand fields available on your PPM Center instance. |
| Field Value 1–5 | Select the field values that correspond to the demand fields you selected. Type any alphanumeric string (up to 40 characters in length). This value should exactly match the visible field. For Yes/No options, type Y for yes and N for no. |

Request Detail (Filter by Custom Fields) Report

This report is similar to the Request Detail report except that requests can be filtered by values in custom fields. Once the request type is specified for the report, select up to four custom fields for that request type. Run the report for specific values for each of those fields.

To run the Request Detail (Filter by Custom Fields) report, users must have a Demand Management license.

Figure 5-9. Request Detail (Filter by Custom Fields) report fields

The screenshot shows the 'Report Parameters' form for the 'Request Detail (Filter by Custom Fields)' report. The form is organized into two columns of fields. The left column contains fields for 'Request Numbers', 'Request Type', 'Status', 'Assigned To', 'Created By', 'Department', 'Workflow', 'Contact', 'Creation Date From', 'Last Update Date From', 'Description Contains', 'Field Prompt 1', 'Field Prompt 2', 'Field Prompt 3', 'Field Prompt 4', 'Report Title', 'Show Header Fields', 'Hide Prompts for Empty Fields', 'Show Field Audit History', 'Show Notes', and 'Show Status'. The right column contains fields for 'Include Closed Requests', 'Priority', 'Assigned To Group', 'Request Sub Type', 'Application', 'Request Group', 'Company Name', 'Creation Date To', 'Last Update Date To', 'Field Value 1', 'Field Value 2', 'Field Value 3', 'Field Value 4', 'Order By', 'Show Detail Fields', 'Show Contents of Table Fields', 'Filter Notes', and 'Show References'. Each field is accompanied by a small icon indicating its type (e.g., text input, date range, dropdown, or checkbox).

| Field Name | Field Type |
|-------------------------------|------------------------|
| Request Numbers | Text Input |
| Request Type | Text Input |
| Status | Text Input |
| Assigned To | Text Input |
| Created By | Text Input |
| Department | Text Input |
| Workflow | Text Input |
| Contact | Text Input |
| Creation Date From | Date Range |
| Last Update Date From | Date Range |
| Description Contains | Text Input |
| Field Prompt 1 | Text Input |
| Field Prompt 2 | Text Input |
| Field Prompt 3 | Text Input |
| Field Prompt 4 | Text Input |
| Report Title | Text Input |
| Show Header Fields | Radio Buttons (Yes/No) |
| Hide Prompts for Empty Fields | Radio Buttons (Yes/No) |
| Show Field Audit History | Radio Buttons (Yes/No) |
| Show Notes | Radio Buttons (Yes/No) |
| Show Status | Radio Buttons (Yes/No) |
| Include Closed Requests | Radio Buttons (Yes/No) |
| Priority | Text Input |
| Assigned To Group | Text Input |
| Request Sub Type | Text Input |
| Application | Text Input |
| Request Group | Text Input |
| Company Name | Text Input |
| Creation Date To | Date Range |
| Last Update Date To | Date Range |
| Field Value 1 | Text Input |
| Field Value 2 | Text Input |
| Field Value 3 | Text Input |
| Field Value 4 | Text Input |
| Order By | Dropdown |
| Show Detail Fields | Radio Buttons (Yes/No) |
| Show Contents of Table Fields | Radio Buttons (Yes/No) |
| Filter Notes | Dropdown |
| Show References | Radio Buttons (Yes/No) |

Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions
(page 1 of 3)

| Field Name (*Required) | Description |
|--------------------------|---|
| Request Numbers | Select one or more request numbers from the request numbers available on your PPM Center instance. |
| *Include Closed Requests | Option to include closed requests. |
| *Request Type | Select a request type from the request types available on your PPM Center instance. |
| Status | Select one or more statuses from the statuses available on your PPM Center instance. |
| Priority | Select one or more priorities from the priorities available on your PPM Center instance. |
| Assigned To | Select one or more users from the users on your PPM Center instance. |
| Assigned To Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Created By | Select one or more users from the users on your PPM Center instance. |
| Request Sub Type | Select one or more subtypes of the specified Request Type from the request subtypes available on your PPM Center instance. |
| Department | Select one or more departments from the departments available on your PPM Center instance. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Request Group | Select one or more request groups from the request groups available on your PPM Center instance. |

Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions
(page 2 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Contact | Select one or more contacts from the contacts available on your PPM Center instance. |
| Company Name | Select one or more companies from the companies available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only those requests created on or after this date. |
| Creation Date To | Select the ending date. The report will include only those requests created on or before this date. |
| Last Update Date From | Select the starting date. The report will include only those requests updated on or after this date. |
| Last Update Date To | Select the ending data. The report will include only requests updated on or before this date. |
| Description Contains | Specify the string that must appear in the description. Type any alphanumeric string (up to 200 characters in length). |
| Field Prompt 1–4 | Select these field prompts from the field prompts available on your PPM Center instance. |
| Field Value 1–4 | Select these corresponding field prompt values. Type any alphanumeric string (up to 200 characters in length). This value should exactly match the visible field. For Yes/No options, type Y for yes and N for no. |
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |

Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions
(page 3 of 3)

| Field Name (*Required) | Description |
|--------------------------------|--|
| *Order By | Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Request Number • Application • Assigned To • Created By • Creation Date • Department • Last Updated Date • Priority • Request Group • Request Sub Type • Request Type • Status |
| *Show Header Fields | Option to show header fields. |
| *Show Detail Fields | Option to show details (custom fields). |
| *Hide Prompts For Empty Fields | Option to hide prompts for empty fields. |
| *Show Contents of Table Fields | Option to show the contents of table component fields. |
| *Show Field Audit History | Option to show the transaction history. |
| *Show Notes | Option to show notes. |
| *Filter Notes | Indicate the scope of the notes. Choices include: <ul style="list-style-type: none"> • Show all notes • Show only user notes |
| *Show Status | Option to show workflow steps and their current status. |
| *Show References | Option to show references. |

Request Detail Report

This report provides information about requests using a number of selection criteria. For each request, the report displays:

- All notes attached to the request
- Current status of the request
- A list of future steps
- All populated detail fields for the request
- Requests assigned to a user
- Requests ready for review
- All new requests that need to be tracked

To run the Request Detail report, users must have a Demand Management license.

Figure 5-10. Request Detail report fields

Report Parameters
Restore Default

Request Numbers:

Request Type:

Status:

Assigned To:

Created By:

Department:

Workflow:

Contact:

Creation Date From:

Last Update Date From:

Description Contains:

Report Title:

*Show Header Fields: Yes No

*Hide Prompts for Empty Fields: Yes No

*Show Field Audit History: Yes No

*Show Notes: Yes No

*Show Status: Yes No

*Include Closed Requests: Yes No

Priority:

Assigned To Group:

Request Sub Type:

Application:

Request Group:

Company Name:

Creation Date To:

Last Update Date To:

*Order By:

*Show Detail Fields: Yes No

*Show Contents of Table Fields: Yes No

*Filter Notes:

*Show References: Yes No

Table 5-10. Request Detail report field descriptions (page 1 of 4)

| Field Name (*Required) | Description |
|--------------------------|--|
| Request Numbers | Select one or more request numbers from the request numbers available on your PPM Center instance. |
| *Include Closed Requests | Option to include closed requests. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |
| Status | Select one or more statuses from the statuses available on your PPM Center instance. |
| Priority | Select one or more priorities from the priorities available on your PPM Center instance. |

Table 5-10. Request Detail report field descriptions (page 2 of 4)

| Field Name (*Required) | Description |
|------------------------|---|
| Assigned To | Select one or more users from the users on your PPM Center instance. |
| Assigned To Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Created By | Select one or more users from the users on your PPM Center instance. |
| Request Sub Type | Select one or more subtypes of the specified Request Type from the request subtypes available on your PPM Center instance. |
| Department | Select one or more departments from the departments available on your PPM Center instance. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Request Group | Select one or more request groups from the request groups available on your PPM Center instance. |
| Contact | Select one or more contacts from the contacts available on your PPM Center instance. |
| Company Name | Select one or more companies from the companies available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only those requests created on or after this date. |
| Creation Date To | Select the ending date. The report will include only those requests created |
| Last Update Date From | Select the starting date. The report will include only those requests updated on or after this date. |

Table 5-10. Request Detail report field descriptions (page 3 of 4)

| Field Name (*Required) | Description |
|--------------------------------|---|
| Last Update Date To | Select the ending date. The report will include only requests updated on or before this date. |
| Description Contains | Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length). |
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Order By | <p>Select the sort criteria. Choices include:</p> <ul style="list-style-type: none"> • Request Number • Application • Assigned To • Created By • Creation Date • Department • Last Updated Date • Priority • Request Group • Request Sub Type • Request Type • Status |
| *Show Header Fields | Option to show the header field |
| *Show Detail Fields | Option to show details (custom fields). |
| *Hide Prompts for Empty Fields | Option to hide the prompts for empty fields. |
| *Show Contents of Table Fields | Option to show the contents of table component fields. |
| *Show Field Audit History | Option to show the transaction history. |
| *Show Notes | Option to show notes. |

Table 5-10. Request Detail report field descriptions (page 4 of 4)

| Field Name (*Required) | Description |
|------------------------|---|
| *Filter Notes | Indicates the scope of the notes to show. Choices include: <ul style="list-style-type: none"> • Show all notes • Show only user notes |
| *Show Status | Option to show workflow steps and their current status. |
| *Show References | Option to show references. |

Request History Report

This report lists the complete workflow and field change history for each selected Request. For each request, this report provides the following details on each change in the status of each workflow step:

- Date and time the status changed
- Person who caused the change
- New status of that step

You can view data changes for fields that have been configured to have transaction history auditing. Use this report for auditing the transaction history of individual requests.

To run the Request History report, users must have a Demand Management license.

Figure 5-11. Request History report fields

The screenshot shows a web-based form titled "Report Parameters" with a "Restore Default" link in the top right corner. The form is organized into two columns of input fields. The left column includes: "Request Numbers:" (text input), "Request Type:" (text input), "Status:" (text input), "Assigned To:" (text input with a user icon), "Created By:" (text input with a user icon), "Department:" (text input), "Workflow:" (text input), "Contact:" (text input), "Creation Date From:" (date input), "Last Update Date From:" (date input), "Description Contains:" (text input), and "Report Title:" (text input with "Request History Report" pre-filled). The right column includes: "Include Closed Requests:" (radio buttons for "Yes" and "No", with "No" selected), "Priority:" (text input), "Assigned To Group:" (text input), "Request Sub Type:" (text input), "Application:" (text input), "Request Group:" (text input), "Company Name:" (text input), "Creation Date To:" (date input), "Last Update Date To:" (date input), and "Order By:" (dropdown menu with "Request Number" selected).

Table 5-11. Request History report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|--------------------------|---|
| Request Numbers | Select one or more request numbers from the request numbers available on your PPM Center instance. |
| *Include Closed Requests | Option to include requests with completed workflows. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |
| Status | Select one or more statuses from the statuses available on your PPM Center instance. |
| Priority | Select one or more priorities from the priorities available on your PPM Center instance. |
| Assigned To | Select one or more users from the users on your PPM Center instance. |
| Assigned To Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Created By | Select one or more users from the users on your PPM Center instance. |
| Request Sub Type | Select one or more subtypes of the specified Request Type from the request subtypes available on your PPM Center instance. |
| Department | Select one or more departments from the departments available on your PPM Center instance. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Request Group | Select one or more request groups from the request groups available on your PPM Center instance. |

Table 5-11. Request History report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Contact | Select one or more contacts from the contacts available on your PPM Center instance. |
| Company Name | Select one or more companies from the companies available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only those requests created on or after this date. |
| Creation Date To | Select the ending date. The report will include only those requests created on or before this date. |
| Last Update Date From | Select the starting date. The report will include only requests those updated on or after this date. |
| Last Update Date To | Select the ending date. The report will include only those requests updated on or before this date. |
| Description Contains | Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length). |
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Order By | Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Application • Assigned To • Created By • Creation Date • Department • Last Updated Date • Priority • Request Group • Request Number • Request Type • Request Sub Type • Status |

Request Quick View Report

This report lists a quick summary of open and closed requests, breaking down the requests by priority. The report also shows the request activity for the current week (using a Sunday to Saturday week), such as for requests opened and requests closed. The report can also show selected request information for each open request, allowing managers to view both a summary view on request activity and drill down into request details.

To run the Request Quick View report, users must have a Demand Management license.

Figure 5-12. Request Quick View report fields

The screenshot shows the 'Report Parameters' form for the Request Quick View report. The form is organized into two columns of fields. The left column includes: Request Numbers (text input), Request Type (text input), Status (text input), Assigned To (text input with user icon), Created By (text input with user icon), Department (text input), Workflow (text input), Contact (text input), Creation Date From (text input with calendar icon), Last Update Date From (text input with calendar icon), Description Contains (text input), Report Title (text input with value 'Request Quick View'), Show Details (radio buttons for Yes/No, with Yes selected), Show Summary (radio buttons for Yes/No, with Yes selected), and Columns to Display (8 max) (text input with value 'Request No., Description, Requ' and a list icon). The right column includes: Include Closed Requests (radio buttons for Yes/No, with No selected), Priority (text input), Assigned To Group (text input), Request Sub Type (text input), Application (text input), Request Group (text input), Company Name (text input), Creation Date To (text input with calendar icon), Last Update Date To (text input with calendar icon), and Order By (dropdown menu with value 'Request Number'). A 'Restore Default' button is located in the top right corner of the form area.

Table 5-12. Request Quick View report field descriptions (page 1 of 3)

| Field Name (*Required) | Description |
|-------------------------|--|
| Request Numbers | Specify one or more request numbers from the request numbers available on your PPM Center instance. |
| Include Closed Requests | Option to include closed requests. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |
| Status | Select one or more statuses from the statuses available on your PPM Center instance. |
| Priority | Select one or more priorities from the priorities available on your PPM Center instance. |
| Assigned To | Select one or more users from the users on your PPM Center instance. |
| Assigned To Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Created By | Select one or more users from the users on your PPM Center instance. |
| Request Sub Type | Select one or more subtypes of the specified Request Types from the request subtypes available on your PPM Center instance. |
| Department | Select one or more departments from the departments available on your PPM Center instance. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Request Group | Select one or more request groups from the request groups available on your PPM Center instance. |

Table 5-12. Request Quick View report field descriptions (page 2 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Contact | Select one or more contacts from the contacts available on your PPM Center instance. |
| Company Name | Select one or more companies from the companies available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only those requests created on or after this date. |
| Creation Date To | Select the ending date. The report will include only those requests created on or before this date. |
| Last Update Date From | Select the starting date. The report will include only those requests updated on or after this date. |
| Last Update Date To | Select the ending date. The report will include only those requests updated on or before this date. |
| Description Contains | Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length). |
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Order By | Select the sort criteria: Choices include: <ul style="list-style-type: none"> ● Request Number ● Created By ● Creation Date ● Priority ● Request Type ● Status ● Description ● Assigned User |

Table 5-12. Request Quick View report field descriptions (page 3 of 3)

| Field Name (*Required) | Description |
|-----------------------------|--|
| *Show Details | Option to show details. |
| Show Summary | Option to show the summary. |
| *Columns to Display (8 max) | Select one to eight columns of information from those columns available on your PPM Center instance. |

Request Summary (Filter by Custom Fields) Report

This report is similar to the Request Summary report, except that requests can be filtered by values in custom fields. Once the request type is specified for the report, select up to four of the custom fields for that request type. Run the report for specific values, for each of those fields.

To run the Request Summary (Filter by Custom Fields) report, users must have a Demand Management license.

Figure 5-13. Request Summary (Filter by Custom Fields) report fields

The screenshot shows the 'Report Parameters' form for the 'Request Summary (Filter by Custom Fields)' report. The form is organized into two columns of input fields. The left column includes fields for 'Request Numbers', 'Request Type', 'Status', 'Assigned To', 'Created By', 'Department', 'Workflow', 'Contact', 'Creation Date From', 'Last Update Date From', 'Description Contains', 'Field Prompt 1', 'Field Prompt 2', 'Field Prompt 3', and 'Field Prompt 4'. The right column includes 'Include Closed Requests' (radio buttons for Yes and No, with No selected), 'Priority', 'Assigned To Group', 'Request Sub Type', 'Application', 'Request Group', 'Company Name', 'Creation Date To', 'Last Update Date To', 'Field Value 1', 'Field Value 2', 'Field Value 3', and 'Field Value 4'. At the bottom, there are fields for 'Report Title' (pre-filled with 'Request Summary (Filter by Custom)') and 'Group By'. A 'Restore Default' button is located in the top right corner. The 'Include Subtotals for First Group Column' section at the bottom left has radio buttons for 'Yes' and 'No', with 'Yes' selected.

Table 5-13. Request Summary (Filter by Custom Fields) report field descriptions
(page 1 of 3)

| Field Name (*Required) | Description |
|--------------------------|--|
| Request Numbers | Select one or more request numbers from the request numbers available on your PPM Center instance. |
| *Include Closed Requests | Option to include closed requests. |
| Request Type | Select a request type from the request types available on your PPM Center instance. |
| Status | Select one or more statuses from the statuses available on your PPM Center instance. |
| Priority | Select one or more priorities from the priorities available on your PPM Center instance. |
| Assigned To | Select one or more users from the users on your PPM Center instance. |
| Assigned To Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Created By | Select one or more users from the users on your PPM Center instance. |
| Request Sub Type | Select one or more subtypes of the specified Request Types from the request subtypes available on your PPM Center instance. |
| Department | Select one or more departments from the departments available on your PPM Center instance. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Request Group | Select one or more request groups from the request groups available on your PPM Center instance. |

Table 5-13. Request Summary (Filter by Custom Fields) report field descriptions
(page 2 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Contact | Select one or more contacts from the contacts available on your PPM Center instance. |
| Company Name | Select one or more companies from the companies available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only those requests created on or after this date. |
| Creation Date To | Select the ending date. The report will include only those requests created on or before this date. |
| Last Update Date From | Select the starting date. The report will include only those requests updated on or after this date. |
| Last Update Date To | Select the ending date. The report will include only those requests updated on or before this date. |
| Description Contains | Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length). |
| Field Prompt 1–4 | Select these field prompts from those field prompts available on your PPM Center instance. |
| Field Value 1–4 | Select these corresponding field prompt values. Type any alphanumeric string (up to 200 characters in length). This value should exactly match the visible field. For Yes/No options, type Y for yes and N for no. |

Table 5-13. Request Summary (Filter by Custom Fields) report field descriptions
(page 3 of 3)

| Field Name (*Required) | Description |
|---|---|
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Group By | Select one or more sort criteria. Choices include: <ul style="list-style-type: none"> • Assigned Group • Assigned User • Company Name • Contact Email • Contact Name • Contact Phone • Created By • Created On • Department • Description • Last Updated On • Application • Priority • Request Group • Request Number • Request Sub Type • Request Type • Status • Days Open • Workflow • Percent Complete |
| *Include Subtotals for First Group Column | Option to include subtotals for the first group. |

Request Summary Report

This report displays the total counts for groups of requests matching the selection criteria. Selected requests can be grouped in up to five categories. For example, a report can display the counts for requests in each department/assigned user combination or for each department/application/priority combination.

To run the Request Summary report, users must have a Demand Management license.

Figure 5-14. Request Summary report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link in the top right corner. The form is organized into two columns of input fields. The left column includes: "Request Numbers:" (text input), "Request Type:" (text input), "Status:" (text input), "Assigned To:" (text input with a user icon), "Created By:" (text input with a user icon), "Department:" (text input), "Workflow:" (text input), "Contact:" (text input), "Creation Date From:" (date input), "Last Update Date From:" (date input), "Description Contains:" (text input), "Report Title:" (text input with "Request Summary Report" pre-filled), and "Group By:" (text input). The right column includes: "Include Closed Requests:" (radio buttons for Yes and No, with No selected), "Priority:" (text input), "Assigned To Group:" (text input), "Request Sub Type:" (text input), "Application:" (text input), "Request Group:" (text input), "Company Name:" (text input), "Creation Date To:" (date input), and "Last Update Date To:" (date input). At the bottom left, there is a section for "Include Subtotals for First Group Column:" with radio buttons for Yes and No, where Yes is selected.

Table 5-14. Request Summary report field descriptions (page 1 of 3)

| Field Name (*Required) | Description |
|--------------------------|--|
| Request Numbers | Select one or more request numbers from the request numbers available on your PPM Center instance. |
| *Include Closed Requests | Option to include closed requests. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |
| Status | Select one or more statuses from the statuses available on your PPM Center instance. |
| Priority | Select one or more priorities from the priorities available on your PPM Center instance. |
| Assigned To | Select one or more users from the users on your PPM Center instance. |
| Assigned To Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Created By | Select one or more users from the users on your PPM Center instance. |
| Request Sub Type | Select one or more subtypes of the specified Request Types from the request subtypes available on your PPM Center instance. |
| Department | Select one or more departments from the departments available on your PPM Center instance. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Workflow | Select one or more workflows from the workflows available on your PPM Center instance. |
| Request Group | Select one or more request groups from the request groups available on your PPM Center instance. |

Table 5-14. Request Summary report field descriptions (page 2 of 3)

| Field Name (*Required) | Description |
|------------------------|--|
| Contact | Select one or more contacts from the contacts available on your PPM Center instance. |
| Company Name | Select one or more companies from the companies available on your PPM Center instance. |
| Creation Date From | Select the starting date. The report will include only those requests created on or after this date. |
| Creation Date To | Select the ending date. The report will include only those requests created on or before this date. |
| Last Update Date From | Select the starting date. The report will include only those requests updated on or after this date. |
| Last Update Date To | Select the ending date. The report will include only requests updated on or before this date. |
| Description Contains | Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length). |

Table 5-14. Request Summary report field descriptions (page 3 of 3)

| Field Name (*Required) | Description |
|---|---|
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Group By | Select one or more sort criteria. Choices include: <ul style="list-style-type: none"> • Assigned Group • Assigned User • Company Name • Contact Email • Contact Name • Contact Phone • Created By • Created On • Department • Description • Last Updated On • Application • Priority • Request Group • Request Number • Request Sub Type • Request Type • Status • Days Open • Workflow • Percent Complete |
| *Include Subtotals for First Group Column | Option to include subtotals for the first group. |

Satisfied Demand History Report

Use this report to show the history of demand that has been satisfied for a specified demand set. Demand can be grouped by any of the demand set fields, and further filtered by specific values of those fields.

To run the Satisfied Demand History report, users must have a Demand Management license.

Figure 5-15. Satisfied Demand History report fields

Table 5-15. Satisfied Demand History report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| *Demand Set Name | Select a demand set from the demand sets available on your PPM Center instance. |
| Request Type | Select one or more request types from the request types available on your PPM Center instance. |

Table 5-15. Satisfied Demand History report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| Requestor Department | Select a department from the departments available at your site. |
| Priority | Select one or more priorities. Choices include: <ul style="list-style-type: none"> • Low • Normal • High • Critical |
| Assigned to Group | Select one or more security groups from the security groups available on your PPM Center instance. |
| Demand Disposition | Read-only field. |
| Application | Select one or more applications from the applications available on your PPM Center instance. |
| Demand Grouped By | Select a demand set grouping from those demand fields available on your PPM Center instance. |
| Period Type | Specify the time period. Choices include: <ul style="list-style-type: none"> • Months • Weeks |
| Past Periods | Specify the number of historic periods of Period Type . Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator). |
| Demand Field 1–5 | Select these demand fields from those demand fields available on your PPM Center instance. |
| Field Value 1–5 | Select these corresponding demand field values. Type any alphanumeric string (up to 40 characters in length). This value should exactly match the visible field. For Yes/No options, type Y for yes and N for no. |

6 Project Management Reports

Baseline Comparison Report

This report compares a project's schedule to a baseline or compares two baselines.

To run the Baseline Comparison report, users must have a Project Management license.

Figure 6-1. Baseline Comparison report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" link in the top right corner. The form contains the following fields and options:

- Project:** A text input field with a list icon on the right.
- Compare:** A text input field with a list icon on the right.
- To:** A text input field with a list icon on the right.
- Show Only Changes:** Radio buttons for Yes and No, with "No" selected.
- Show Only Summary Tasks:** Radio buttons for Yes and No, with "No" selected.
- Show Start Date Changes:** Radio buttons for Yes and No, with "Yes" selected.
- Show Finish Date Changes:** Radio buttons for Yes and No, with "Yes" selected.
- Show Duration Changes:** Radio buttons for Yes and No, with "Yes" selected.
- Show Effort Changes:** Radio buttons for Yes and No, with "Yes" selected.
- Only Indicate Changes Larger Than(days):** A text input field.
- Show Cost Changes For:** A text input field with a list icon on the right.
- Only Indicate Cost Changes Larger Than:** A text input field.
- Show Resource Changes:** Radio buttons for Yes and No, with "No" selected.
- Include Completed Tasks:** Radio buttons for Yes and No, with "No" selected.
- Include Cancelled Tasks:** Radio buttons for Yes and No, with "No" selected.

Table 6-1. Baseline Comparison report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|--|---|
| *Project | Select a project from the projects available on your PPM Center instance. |
| *Compare | Select a baseline or work plan for this project from those work plans or baselines available on your PPM Center instance. |
| *To | Select another baseline or work plan for this project from the projects or baselines available on your PPM Center instance. |
| Show Only Changes | Option to show changes only. Use this when you want to view only the differences between the entities. |
| Show Only Summary Tasks | Option to show summary tasks only. |
| Show Start Date Changes | Option to show changes in task start dates. |
| Show Finish Date Changes | Option to show changes in task finish dates. |
| Show Duration Changes | Option to show changes in task durations. |
| Show Effort Changes | Option to show changes in task effort. |
| Only Indicate Changes Later Than(days) | Specify the number of days that should be ignored. That is, changes smaller than the specified amount will not be shown. Type any integer (in the range of -999 to 9,999 and without a comma separator). |
| Show Cost Changes For | Select one or more cost categories. Choices include: <ul style="list-style-type: none"> • Planned Labor • Planned Non-Labor • Planned Cost • Planned Capital Cost • Planned Operating Cost |
| Only Indicate Cost Changes Larger Than | Specify the minimum cost changes to report upon. Type any integer (in the range of -999 to 9,999 and without a comma separator). |

Table 6-1. Baseline Comparison report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|-------------------------------|--|
| Show Resource Changes | Option to compare tasks having resource changes. |
| Include Completed Tasks | Option to compare tasks having Completed status. |
| Include Cancelled Tasks | Option to compare tasks having Cancelled status. |

Project Cost Breakdown Report

This report shows the costs for a project, and the activities with which the costs are associated. Totals include both labor and non-labor costs.



This report also appears in the Financial Management category.

To run the Project Cost Breakdown report, users must have a Project Management license.

Figure 6-2. Project Cost Breakdown report fields

Table 6-2. Project Cost Breakdown report field descriptions

| Field Name (*Required) | Description |
|------------------------|---|
| *Project | Select one or more projects from the projects available on your PPM Center instance. |
| *Breakdown Period | Select a breakdown period. Choices include: <ul style="list-style-type: none">• Project to Date. Costs are displayed for the entire project(s).• Month. Costs are displayed for month and year specified in Period. |
| Period | If reporting on costs for a specific month, select the month and year from those periods available on your PPM Center instance. |
| Local Currency | Option to select if the costs should be displayed in local currency or in the PPM Center system base currency. |

Project Cost Details Report

This report shows the cost details for select project work plans, grouped by labor and non-labor, or operating categorizations.



This report also appears in the Financial Management category.

To run the Project Cost Details report, users must have a Project Management license.

Figure 6-3. Project Cost Details report fields

Report Parameters Restore Default

Project Name:

Project Manager:

Limit Hierarchy Depth to:

Group costs by Capital and Operating Yes No

Local Currency Yes No

Table 6-3. Project Cost Details report field descriptions (page 1 of 2)

| Field Name | Description |
|-----------------|---|
| Project Name | Specify one or more projects from the projects available on your PPM Center instance. |
| Project Manager | This will limit the report results to only the selected project managers. Select one or more project managers from the users available on your PPM Center instance. |

Table 6-3. Project Cost Details report field descriptions (page 2 of 2)

| Field Name | Description |
|--------------------------------------|--|
| Limit Hierarchy Depth to | Specify the level of cost details to show. Type any integer (in the range of 0 to 999,999,999 and without a comma separator). Realistically, however, the range should be from 1 to 10. A depth of 1 will show costs at the work plan level. |
| Group costs by Capital and Operating | Option to select if the costs should be grouped as capital and operating. Choices include: <ul style="list-style-type: none"> • Yes. Costs are grouped as capital or operating. • No. Costs are grouped as labor and non-labor. |
| Local Currency | Option to select if the costs should be displayed in local currency or in the PPM Center system base currency. Choices include: <ul style="list-style-type: none"> • Yes. Costs are displayed in local currency. • No. Costs are displayed in the PPM Center system base currency. |

7 Time Management Reports

Actual Time Summary Report

This report summarizes actual time information provided in non-cancelled time sheets. Different parameters provide different views into the data. For example:

- The total time entered, per resource, for each time period
- The total time entered, per project
- The total time entered in each given time period

This report is similar to the Time Sheet Summary Report, except it does not show work allocation budget information.

To run the Actual Time Summary report, users must have a Time Management license.



This report was rewritten in PPM Center version 7.5. Use of the earlier version should be discontinued and customized reports based on the earlier version should be reimplemented.

Figure 7-1. Actual Time Summary report fields

The screenshot shows a 'Report Parameters' form with the following fields and options:

- Group By:** A text input field with a list icon.
- Period Type:** A dropdown menu.
- Starting Time Period:** A text input field with a list icon.
- Ending Time Period:** A text input field with a list icon.
- Work Item Type:** A dropdown menu.
- Work Item Set:** A text input field with a list icon.
- Work Item:** A text input field with a list icon.
- Activity:** A text input field with a list icon.
- Charge Code:** A text input field with a list icon.
- Resource:** A text input field with a list icon.
- Resource Group:** A text input field with a list icon.
- Show Groups with Actual Hours Greater Than or Equal To:** A text input field.
- Include Unsubmitted Time Sheets:** Radio buttons for Yes (selected) and No.
- Show Subtotals:** Radio buttons for Yes and No (selected).
- Show Actual Cost:** Radio buttons for Yes and No (selected).

Table 7-1. Actual Time Summary report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| *Group By | Select one or more grouping criteria. Choices include: <ul style="list-style-type: none"> • Work Item Type • Work Item Set • Work Item • Activity • Resource • Time Period • Charge Code • Time Sheet # |
| *Period Type | Select a period type from the period types available on your PPM Center instance. |
| *Starting Time Period | Select the starting date from those date ranges available on your PPM Center instance. |
| Resource | Select one or more resources from the resources available on your PPM Center instance. |

Table 7-1. Actual Time Summary report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|--|---|
| *Ending Time Period | Select the ending date from those date ranges available on your PPM Center instance. |
| Resource Group | Select one or more resource groups from the resource groups available on your PPM Center instance. |
| Work Item Type | Select a work item type. Choices include: <ul style="list-style-type: none"> • Request • Package • Task • Misc |
| Work Item Set | Select a work item set from the work item sets available on your PPM Center instance. |
| Show Groups with Actual Hours Greater Than or Equal To | Specify the minimum total actual hours of a group, where the grouping is specified in the Group By field. Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator). This allows you to filter for the areas with large time charges. |
| Work Item | Select a work item from the work items available on your PPM Center instance. |
| Include Unsubmitted Time Sheets | Option for whether unsubmitted time sheets should be shown. |
| Activity | Select an activity from the activities available on your PPM Center instance. |
| Show Subtotals | Option for whether subtotals should be shown. |
| Charge Code | Select a charge code from the charge codes available on your PPM Center instance. |
| Show Actual Cost | Option for whether actual costs should be shown. |

Delinquent Time Sheets

This report list the time sheets that are delinquent.

To run the Delinquent Time Sheets, users must have a Time Management license.

Figure 7-2. Delinquent Time Sheets fields

Table 7-2. Delinquent Time Sheets field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|---|---|
| *Previous Time Periods to Show | Specify the number of previous time periods to show. Type any numeric value (between 0 and 12). |
| *Include Current Period | Option to include the current time period. |
| *Grace Period in Days (affects past periods only) | Specify the number of days to include in the grace period. Type any numeric value (between 0 and 31). |
| Resource | Select one or more resources from the resources available on your PPM Center instance. |
| Direct Manager | Select a manager from the managerial resources available on your PPM Center instance. |

Table 7-2. Delinquent Time Sheets field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|--|
| Default Time Approver | Select a time approver from the time approvers available on your PPM Center instance. |
| Organization Unit | Select an organization from the organizations available on your PPM Center instance. |
| Time Sheet Status | Select a status from the statuses available on your PPM Center instance. |
| Sort by | Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Resource • Period Name |

Time Sheet Details Report

This report summarizes multiple time sheets and displays their details. The report displays the following information:

- Header information
- Daily time information
- Line information, for example, work item, actuals-to-date, charge code, activity information, and notes details

To run the Time Sheet Details report, users must have a Time Management license.

Figure 7-3. Time Sheet Details report fields

The screenshot shows a 'Report Parameters' form with the following fields and options:

- Period Type:** A dropdown menu.
- Time Period:** A text input field with a search icon.
- Resource:** A text input field with a search icon.
- Resource Group:** A text input field with a search icon.
- Description Contains:** A text input field.
- Report Title:** A text input field containing 'Time Sheet Detail Report'.
- Time Sheet #:** A text input field.
- Order By:** A dropdown menu set to 'Time Period, Resource'.
- Include Frozen and Closed:** Radio buttons for Yes (selected) and No.
- Include Cancelled:** Radio buttons for Yes and No (selected).
- Show Time Sheet Notes:** Radio buttons for Yes and No (selected).
- Show Charge Codes:** Radio buttons for Yes and No (selected).
- Show Line Notes:** Radio buttons for Yes and No (selected).
- Show Activity Details:** Radio buttons for Yes and No (selected).

Table 7-3. Time Sheet Details report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|---------------------------|--|
| *Period Type | Select a period type from the period types available on your PPM Center instance. |
| *Time Period | Select a time period from the time periods available on your PPM Center instance. |
| Include Frozen and Closed | Option to include frozen and closed time sheets. |
| Resource | Select one or more resources from the resources available on your PPM Center instance. |
| Include Cancelled | Option to include cancelled time sheets. |
| Resource Group | Select one or more resource groups from the resource groups available on your PPM Center instance. |
| Status | Select a status from the statuses available on your PPM Center instance. |
| Description Contains | Specify a description filter. Type any alphanumeric string (up to 200 characters in length). |
| Time Sheet # | Specify a time sheet number. Type any numeric value (between 0 and 999,999,999 and without a comma separator). |

Table 7-3. Time Sheet Details report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| Report Title | Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length). |
| Order By | Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Time Period, followed by Resource • Resource, followed by Time Period |
| Show Time Sheet Notes | Option to show the header notes. |
| Show Line Notes | Option to show the notes attached to each time sheet line. |
| Show Charge Codes | Option to show the charge codes. |
| Show Activity Details | Option to show activity details. |

Time Sheet Summary Report

This report summarizes time information provided in non-cancelled time sheets. Different parameters provide different views into the data, for example:

- The total time entered, per resource, for time period
- The total time entered, per project, versus the budget for that project
- The total time entered in each give time period

This report is similar to the Actual Time Summary report, except that this report shows work allocation budget information.

To run the Time Sheet Summary report, users must have a Time Management license.

Figure 7-4. Time Sheet Summary report fields

The screenshot shows a 'Report Parameters' form with the following fields and options:

- Group By:** Text input field with a list icon.
- Period Type:** Dropdown menu.
- Starting Time Period:** Text input field with a list icon.
- Ending Time Period:** Text input field with a list icon.
- Current Plus Last X Periods:** Text input field.
- Work Item Type:** Dropdown menu.
- Work Item Set:** Text input field with a list icon.
- Work Item:** Text input field with a list icon.
- Activity:** Text input field with a list icon.
- Charge Code:** Text input field with a list icon.
- Resource:** Text input field with a list icon.
- Resource Group:** Text input field with a list icon.
- Time Sheet #:** Text input field with a list icon.
- Include Closed Time Sheets:** Radio buttons for Yes (selected) and No.
- Include Unsubmitted Time Sheets:** Radio buttons for Yes (selected) and No.
- Show Actual Cost:** Radio buttons for Yes and No (selected).

Table 7-4. Time Sheet Summary report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|-------------------------------|---|
| *Group By | Select one or more grouping criteria. Choices include: <ul style="list-style-type: none"> • Work Item Type • Work Item Set • Work Item • Activity • Resource • Time Period • Time Sheet # • Time Sheet Status |
| *Period Type | Select a period type from the period types available on your PPM Center instance. |
| Starting Time Period | Select the starting date from those date ranges available on your PPM Center instance. |
| Resource | Select one or more resources from the resources available on your PPM Center instance. |
| Ending Time Period | Select the ending date from those date ranges available on your PPM Center instance. |
| Resource Group | Select one or more resource groups from the resource groups available on your PPM Center instance. |
| Current Plus Last <X> Periods | Specify the number of previous periods to include. Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator). |
| Work Item Type | Select a work item type. Choices include: <ul style="list-style-type: none"> • Request • Package • Task • Misc |

Table 7-4. Time Sheet Summary report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|---------------------------------|---|
| Time Sheet # | Specify a time sheet number. Type any numeric value (between -999,999,999 and 999,999,999 and without a comma separator). |
| Work Item Set | Select a work item set from the work item sets available on your PPM Center instance. |
| Include Closed Time Sheets | Option to include closed time sheets. |
| Work Item | Displays time sheets for a given set of work items (package, request, project, or task). |
| Include Unsubmitted Time Sheets | Option to include unsubmitted time sheets. |
| Activity | Select an activity from the activities available on your PPM Center instance. |
| Charge Code | Select a charge code from the charge codes available on your PPM Center instance. |

Work Allocation Details Report

This report shows much of the same information shown on the Work Allocation definition page. This includes the:

- Allocation work item information
- Budget and actuals to date
- Charge code allocations
- Resource restrictions

This report also returns hyperlinks allowing modification of the work allocation (the Edit Work Allocations access grant is required).

To run the Work Allocation Details report, users must have a Time Management license.



This report also appears in the Resource Management category.

Figure 7-5. Work Allocation Details report fields

Report Parameters Restore Default

Work Item Type:

Work Item Set:

Work Item:

Charge Code:

Creation Date From:

Creation Date To:

Actuals Budget Over X%:

Include Closed: Yes No

Show Resource Restrictions: Yes No

Show Detailed Actuals: Yes No

Show Discounts: Yes No

Sort By:

Table 7-5. Work Allocation Details report field descriptions (page 1 of 2)

| Field Name (*Required) | Description |
|----------------------------|--|
| Work Item Type | Select a work item type. Choices include: <ul style="list-style-type: none"> • Request • Package • Task • Misc |
| Work Item Set | Select a work item set from the work item sets available on your PPM Center instance. |
| Work Item | Specify a work item from the work items available on your PPM Center instance. |
| Charge Code | Select a charge code from the charge codes available on your PPM Center instance. |
| Creation Date From | Select the starting creation date. The report will include only work allocations created on or after this date. |
| Creation Date To | Select the ending creation date. The report will include only work allocations created on or before this date. |
| Actuals/Budget Over <X>% | Specify the minimum percentage for which you want to show work allocations with the actuals are close to (or over) budget. |
| Include Closed | Option to include closed work allocations. |
| Show Resource Restrictions | Option to include restricted resources and resource groups. |

Table 7-5. Work Allocation Details report field descriptions (page 2 of 2)

| Field Name (*Required) | Description |
|------------------------|---|
| Show Detailed Actuals | Option to include the total actuals to date for the work allocation, as well as the breakdown of the actuals provided by each resource. |
| Show Discounts | Option to include the standard and billing discounts. |
| *Sort By | Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Work Item Type • Work Item Set • Work Item • Original Budget (Hrs) • Current Budge (Hrs) |

8 Report Types

Overview of the Report Type Workbench

Use the Report Type Workbench to configure report types. Report types define the reports that are available from the Submit New Report page. The definitions include such features as:

- What categories list the report
- What fields are displayed on the report submission page, and how they are constructed and validated
- Who can access and submit the report, including any required licenses or access grants
- Who can modify the report type
- What commands are actually executed when the report is submitted



Do not change the name of the Baseline Comparison report. Doing so disables the **Compare Baselines** button on the View Baselines page (accessible from the Project Overview page).

Using the Report Type Workbench

Logging On

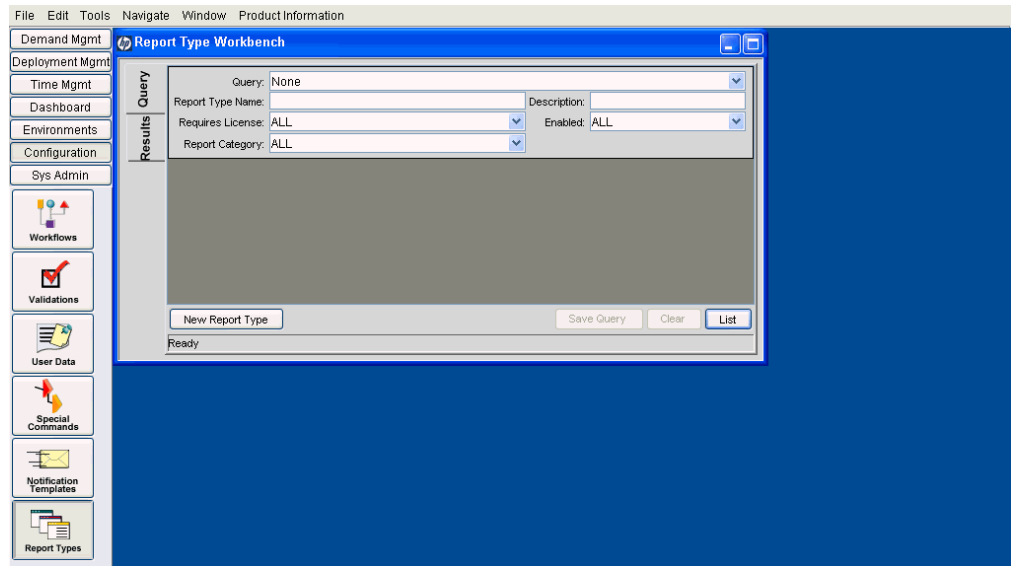
To access the Report Type Workbench:

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

The PPM Workbench opens.

3. From the shortcut bar, select **Configuration > Report Types**.

The Report Type Workbench opens.

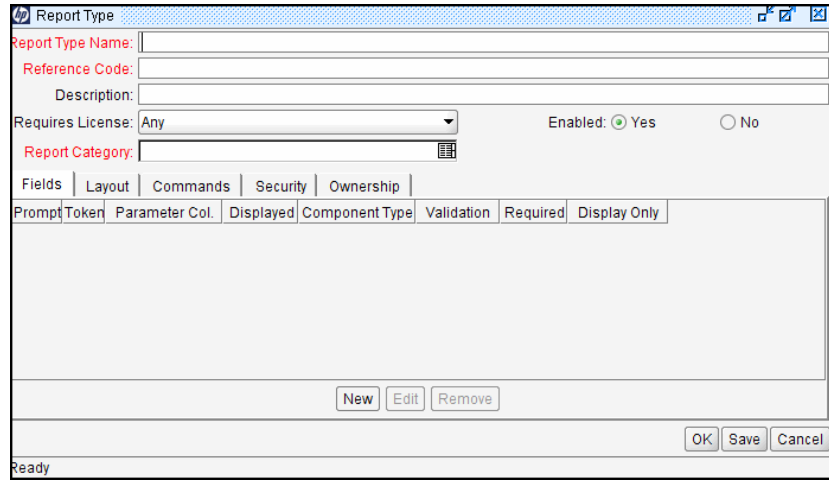


Creating an Entirely New Report Type

To define a new report type that is not based on any existing report type:

1. From the Report Type Workbench, click **New Report Type**.

The Report Type window opens.



The screenshot shows the 'Report Type' dialog box. It has a title bar with a standard Windows icon and window controls. The main area contains several input fields: 'Report Type Name', 'Reference Code', and 'Description'. Below these is a 'Requires License' dropdown menu set to 'Any', and an 'Enabled' section with 'Yes' selected. There is also a 'Report Category' field with a list icon. A tabbed interface is visible with tabs for 'Fields', 'Layout', 'Commands', 'Security', and 'Ownership'. Below the tabs is a table with columns: 'Prompt', 'Token', 'Parameter Col.', 'Displayed', 'Component Type', 'Validation', 'Required', and 'Display Only'. At the bottom of the dialog are buttons for 'New', 'Edit', 'Remove', 'OK', 'Save', and 'Cancel'. The status bar at the very bottom says 'Ready'.

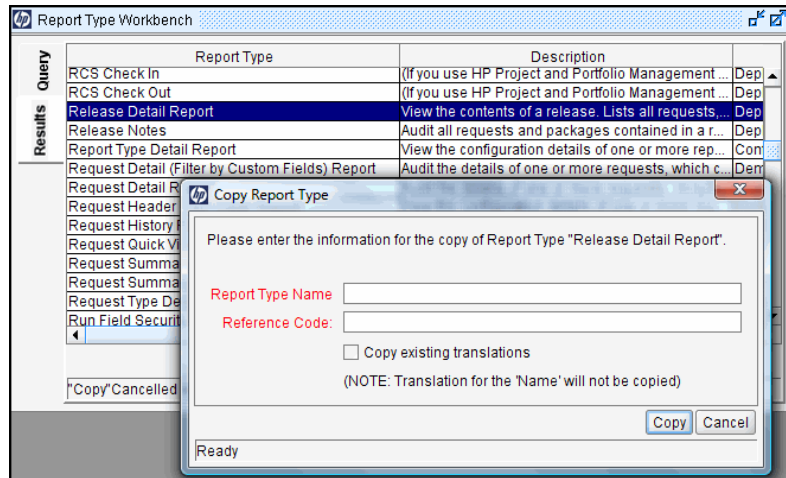
2. Configure the settings using the information provided in *Report Type Windows* on page 175.

Creating a New Report Type From an Existing Report Type

To use an existing report type as the basis of a new report type:

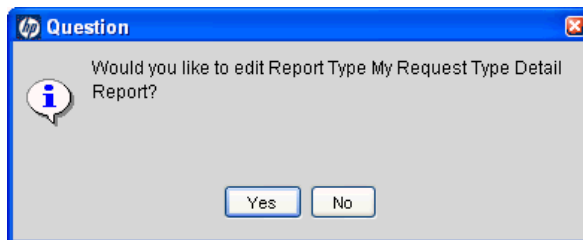
1. From the Report Type Workbench, select the existing report type.
2. Click **Copy**.

The Copy Report Type window opens.



3. Type a **Report Type Name**.
4. Click **Copy** to continue. Otherwise, click **Cancel** to abort.

If you continued, the Question window opens.



5. Click **Yes** if you want to make modifications. Otherwise, click **No**.

If you clicked **Yes**, the Report Type: <Report> window opens.

Report Type : My Request Detail Report-b

Report Type Name: My Request Detail Report

Reference Code: MY_REQUEST_DETAIL_REPORT

Description: View the contents of a release. Lists all requests, packages, and distributions associated with a release.

Requires License: Deployment Management Enabled: Yes No

Report Category: Deployment Management

Fields | Layout | Commands | Security | Ownership

| Prompt | Token | Parameter Col. | Displayed | Component Type |
|---------------------------|------------------------|----------------|-----------|--------------------|
| Created By: | P_CREATED_BY | PARAMETER4 | Y | Auto Complete List |
| Creation Date From: | P_FROM_CREATION_DATE | PARAMETER9 | Y | Date Field |
| Creation Date To: | P_TO_CREATION_DATE | PARAMETER10 | Y | Date Field |
| Description: | P_DESCRIPTION | PARAMETER8 | Y | Text Field |
| Dist. Creation Date From: | P_FROM_DIST_CREATE_... | PARAMETER11 | Y | Date Field |
| Dist. Creation Date To: | P_TO_DIST_CREATE_DATE | PARAMETER12 | Y | Date Field |
| File Extension: | P_FILE_EXTENSION | PARAMETER30 | N | Text Field |

New Edit Remove

OK Save Cancel

Ready

6. View or modify the settings using the information provided in *Report Type Windows* on page 175.

Modifying an Existing Report Type

To update an existing report type:

1. From the Report Type Workbench, select the desired report type.
2. Open the report type either by double-clicking the highlighted row or clicking **Open**.

The Report Type: <Report> window opens.

Report Type: My Request Detail Report-b

Report Type Name: My Request Detail Report

Reference Code: MY_REQUEST_DETAIL_REPORT

Description: View the contents of a release. Lists all requests, packages, and distributions associated with a release.

Requires License: Deployment Management Enabled: Yes No

Report Category: Deployment Management

Fields | Layout | Commands | Security | Ownership

| Prompt | Token | Parameter Col. | Displayed | Component Type |
|---------------------------|------------------------|----------------|-----------|--------------------|
| Created By: | P_CREATED_BY | PARAMETER4 | Y | Auto Complete List |
| Creation Date From: | P_FROM_CREATION_DATE | PARAMETER9 | Y | Date Field |
| Creation Date To: | P_TO_CREATION_DATE | PARAMETER10 | Y | Date Field |
| Description: | P_DESCRIPTION | PARAMETER8 | Y | Text Field |
| Dist. Creation Date From: | P_FROM_DIST_CREATE_... | PARAMETER11 | Y | Date Field |
| Dist. Creation Date To: | P_TO_DIST_CREATE_DATE | PARAMETER12 | Y | Date Field |
| File Extension: | P_FILE_EXTENSION | PARAMETER30 | N | Text Field |

New Edit Remove

OK Save Cancel

Ready

3. View or modify the settings using the information provided in *Report Type Windows* on page 175.

Report Type Windows

The Report Type window and the Report Type: <Report> window are essentially the same—one lacks data and the other has data. Consequently, the information contained in the following sections applies to both windows and, for simplicity, these windows will be termed the Report Type window throughout the following sections.

The Report Type window is composed of:

- General information fields
- **Fields** tab
- **Layout** tab
- **Commands** tab
- **Security** tab
- **Ownership** tab

General Information Fields

The general information fields define the report identification information displayed in the Submit New Report page.

View or modify the general information fields for the given report type, using the information described in *Table 8-1* on page 176.

Table 8-1. Report Type window general information fields descriptions

| Field Name | Description |
|------------------|--|
| Report Type Name | Specify a unique name of the report type. Type any alphanumeric string. |
| Description | Specify a brief description of the report type. Type any alphanumeric string. |
| Requires License | Select the product license that must be configured for users of this report from the licenses available on your PPM Center instance. If no specific license is required, select Any . |
| Enabled | Option to make the report type available for use. |
| Report Category | Select one (or more) categories that should include this report from those categories available on your PPM Center instance. |

Fields Tab

Report type “fields” define the filter fields displayed in the Submit Report: *<Report Name>* window.

Use the **Fields** tab to view and edit the fields for the given report type. Each field in a report type is represented by its own row on the **Fields** tab. Settings for each field are configured using the Field window (as shown in [Figure 8-2 on page 177](#)). Select any existing field to modify its settings, or click **New** to create a new field.

Figure 8-1. Report Type window Fields tab

Report Type Name: My Request Detail Report
 Reference Code: MY_REQUEST_DETAIL_REPORT
 Description: View the contents of a release. Lists all requests, packages, and distributions associated with a release.
 Requires License: Deployment Management Enabled: Yes No
 Report Category: Deployment Management

| Prompt | Token | Parameter Col. | Displayed | Component Type |
|---------------------------|------------------------|----------------|-----------|--------------------|
| Created By: | P_CREATED_BY | PARAMETER4 | Y | Auto Complete List |
| Creation Date From: | P_FROM_CREATION_DATE | PARAMETER9 | Y | Date Field |
| Creation Date To: | P_TO_CREATION_DATE | PARAMETER10 | Y | Date Field |
| Description: | P_DESCRIPTION | PARAMETER8 | Y | Text Field |
| Dist. Creation Date From: | P_FROM_DIST_CREATE_... | PARAMETER11 | Y | Date Field |
| Dist. Creation Date To: | P_TO_DIST_CREATE_DATE | PARAMETER12 | Y | Date Field |
| File Extension: | P_FILE_EXTENSION | PARAMETER30 | N | Text Field |

Buttons: New Edit Remove OK Save Cancel

Figure 8-2. Field window

Field Prompt: Token:
 Description:
 Enabled: Yes No
 Validation:
 Component Type: None
 Multiselect: Yes No
 Attributes | Default | Dependencies
 Parameter Col.: PARAMETER26 Display Only: Never
 Display: Yes No Required: Never
 Buttons: Copy From... OK Add Cancel

The Field window consists of the following:

- General information fields
- **Attributes** tab
- **Default** tab
- **Dependencies** tab

Field Window General Information

View or modify the general information fields using the information described in *Table 8-2*.

Table 8-2. Field window general information field descriptions (page 1 of 2)

| Field Name | Description |
|----------------|---|
| Field Prompt | Specify the prompt that is visible in Submit Report: <Report Name> window. Type any alphanumeric string. |
| Token | Specify the unique token that identifies this field. Type any string. Only uppercase letters, numbers, and underscore are permitted. |
| Description | Specify a brief description of the field. Type any alphanumeric string. |
| Enabled | Option to make the field available for use. |
| Validation | Select the logic used to validate the user input from the validations available on your PPM Center instance. Click New to create a new validation or click Open to review the validation you selected. |
| Component Type | Select the visual characteristics of the field, such as a drop-down list or free-form text field. Choices are limited to characteristics (defined in the corresponding validation) available on your PPM Center instance. |

Table 8-2. Field window general information field descriptions (page 2 of 2)

| Field Name | Description |
|-------------|--|
| Multiselect | Indicate whether or not the field allows users to select more than one entry. This option is only valid for fields using the auto-complete component. |

Attributes Tab

View or modify each field on the **Attributes** tab, as described in [Table 8-3](#) on page 179.

Figure 8-3. Field window Attributes tab

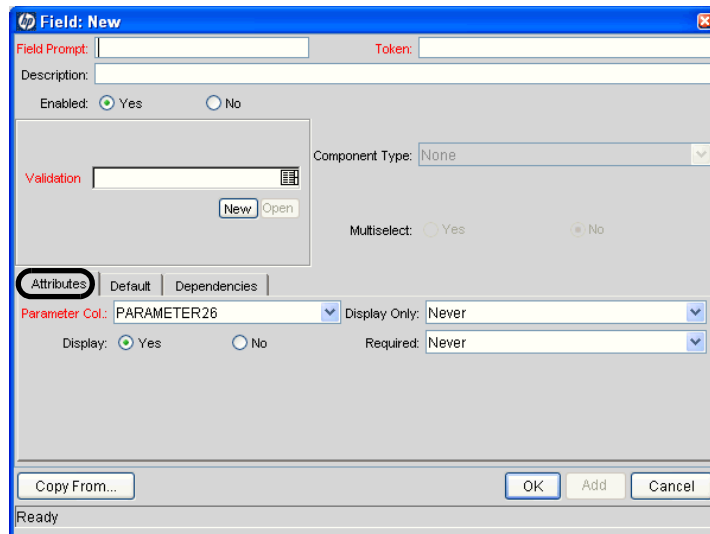


Table 8-3. Field window Attributes tab field descriptions (page 1 of 2)

| Field Name | Description |
|---------------|--|
| Parameter Col | Select the unique internal database table column for storing the value of this field. Choices are limited to 50 columns. |

Table 8-3. Field window Attributes tab field descriptions (page 2 of 2)

| Field Name | Description |
|--------------|---|
| Display Only | <p>Select whether the field can be updated or is read-only. Choices include:</p> <ul style="list-style-type: none"> • Always. The field is only displayed and cannot be modified. (The field appears grayed-out similar to Component Type in Figure 8-3.) • Never. The value for the field can be modified. • Use Dependency Rules. Display of the field relies on the settings in the Dependencies tab. |
| Display | <p>Indicate whether or not the field is visible is visible in Submit Report: <Report Name> window.</p> |
| Required | <p>Select whether a value must be supplied for this field. Choices include:</p> <ul style="list-style-type: none"> • Always. A value for this field is always required. (An asterisk will precede the field prompt in the report as shown for Show Columns in Figure 3-2 on page 37.) • Never. A value for this field is optional. • Use Dependency Rules. Requiring a value for this field relies on the settings in the Dependencies tab. |

Default Tab

View or modify each field on the **Default** tab, as described in *Table 8-4*.

Figure 8-4. Field window Default tab

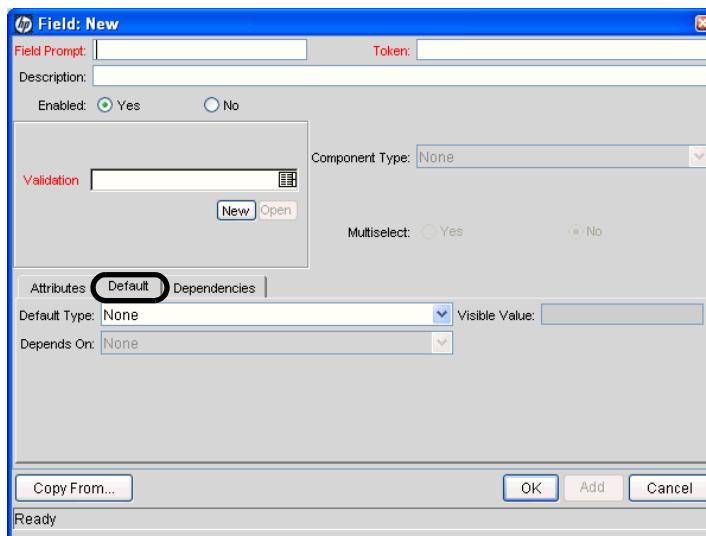


Table 8-4. Field window Default tab field descriptions (page 1 of 2)

| Field Name | Description |
|--------------|--|
| Default Type | Select the type of default value to use. Choices include: <ul style="list-style-type: none">• Constant. Specifies that the constant value provided in the Visible Value field should be displayed.• Parameter. Specifies that the dynamic value provided in the Depends On field should be displayed.• None. Specifies that no default value should be displayed. |

Table 8-4. Field window Default tab field descriptions (page 2 of 2)

| Field Name | Description |
|---------------|--|
| Visible Value | <p>Specify the default value. This value should be what the user would typically specify in the field.</p> <p>If the report type field that you are defining is validated using a drop-down or an auto-complete list, this field displays only valid values. For example, if you have selected a drop-down list validation with possible values of High, Medium, or Low, you can specify a Visible Value of only High, Medium, or Low.</p> <p>This field is enabled only if Constant is chosen as the Default Type.</p> |
| Depends On | <p>Select the default value. This value should be what the user would typically specify in the field. Choices are limited to those tokens defined for this report type</p> <p>This field is enabled only if Parameter is chosen as the Default Type.</p> |

Dependencies Tab

View or modify each field on the **Dependencies** tab, as described in *Table 8-5* on page 184.

Figure 8-5. Field window Dependencies tab

The screenshot shows the 'Field: New' dialog box with the 'Dependencies' tab selected. The 'Dependencies' tab is highlighted with a black circle. The dialog box contains the following fields and controls:

- Field Prompt: [Text Field]
- Token: [Text Field]
- Description: [Text Field]
- Enabled: Yes No
- Validation: [Text Field] with 'New' and 'Open' buttons
- Component Type: [Dropdown Menu] (None)
- Multiselect: Yes No
- Attributes: [Tab] | Default [Tab] | **Dependencies [Tab]**
- Clear When The Following Changes: [Dropdown Menu] (None)
- Display Only When: [Dropdown Menu] (None) | [Dropdown Menu] (like) | [Text Field]
- Required When: [Dropdown Menu] (None) | [Dropdown Menu] (like) | [Text Field]
- Buttons: Copy From..., OK, Add, Cancel
- Status: Ready

Table 8-5. Field window Dependencies tab field descriptions

| Field Name | Description |
|----------------------------------|--|
| Clear When The Following Changes | <p>Select whether the current field is cleared when the specified field changes. Choices are limited to those field prompts defined for this report type. Select None if the field should not be cleared.</p> |
| Display Only When | <p>Select whether the current field is editable only when certain criteria are satisfied. The criteria are specified using the two fields to the right.</p> <p>Choices are limited to those field prompts defined for this report type. Select None if the field should not be cleared.</p> <p>This field is enabled only when Use Dependency Rules in the Display Only field on the Attributes tab is selected.</p> |
| Required When | <p>Select whether the current field is required when certain criteria are satisfied. The criteria are specified using the two fields to the right.</p> <p>Choices are limited to those field prompts defined for this report type. Specify None if the field should not be cleared.</p> <p>This field is enabled only if Use Dependency Rules in the Required field on the Attributes tab is selected.</p> |

Layout Tab

Use the **Layout** tab to specify the graphical presentation (visual layout) of the fields. This tab details the order of the fields, as well as some of their physical characteristics.

View or modify each field on the **Layout** tab, as described in *Table 8-6*. Note that clicking **Preview** allows you to experiment with the organization and presentation of the fields.

Figure 8-6. Report Type window Layout tab

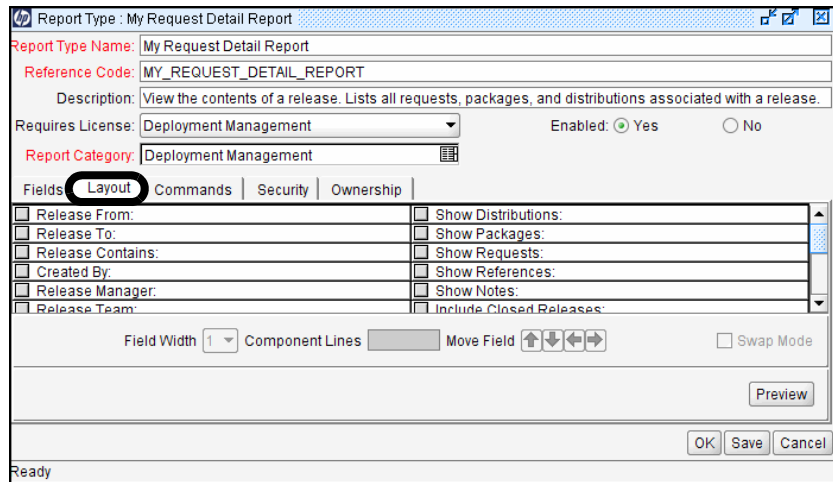


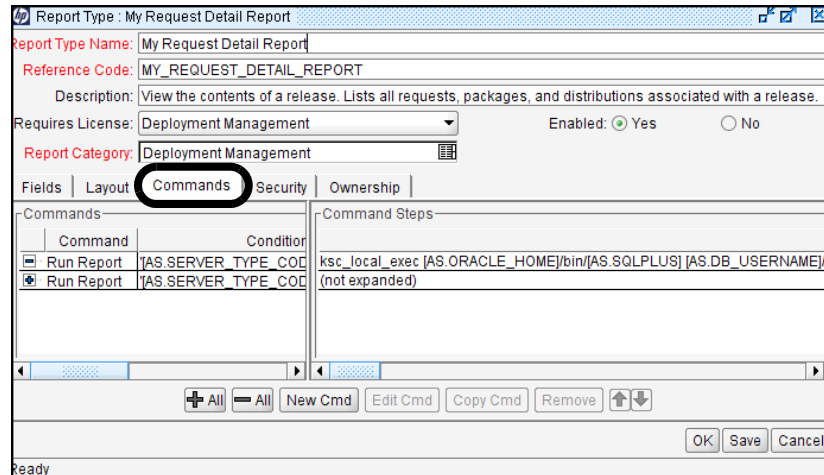
Table 8-6. Report Type window Layout tab field descriptions

| Field Name | Description |
|-------------|--|
| Field Width | Select the width of the field (in columns). Note that if you select two columns, the rightmost column contains a placeholder (▶▶▶) to indicate that it is in use. |
| Move Field | Use the arrow buttons to modify the order of the fields. |

Commands Tab

Use the **Commands** tab to define the steps that must be executed for each report to run successfully. These commands tell PPM Center precisely which steps must be executed to generate the results for the given report type.

Figure 8-7. Report Type window Commands tab



PPM Center commands are designed to have a similar look and feel to the UNIX operating system command structure. In fact, the specific parts of a command, the command steps, are often just command-line directives.

A report type can have many commands, and each command can have many command steps. A command may be viewed as a particular function for a report. For example, calling the `ksc_run_jsp_report` special command to call a report's JSP code, or running command-line SQL*Plus to call a database procedure. To perform these functions, a series of events needs to take place and these events are defined in the command steps.

On the **Commands** tab, select any existing command to modify its settings, or click **New Cmd** to create a new command.

View, specify, or modify each field of the Edit Command (shown in *Figure 8-9*) or New Command window (shown in *Figure 8-8*), as described in *Table 8-7* on page 188. (Similar to Report Type windows, the only difference in these two windows is whether they include data.)

Figure 8-8. New Command window

The 'New Command' dialog box features a blue title bar and a standard Windows-style window layout. It includes the following elements:

- Command:** An empty text input field.
- Condition:** An empty text input field.
- Description:** An empty text input field.
- Timeout (s):** A text input field containing the value '90'.
- Enabled:** Radio buttons for 'Yes' (selected) and 'No'.
- Steps:** A large, empty rectangular area for defining command steps.
- Buttons:** 'Tokens', 'Special Cmd', and 'Show Desc' are on the left; 'OK', 'Add', and 'Cancel' are on the right.
- Status:** A 'Ready' indicator at the bottom left.

Figure 8-9. Edit Command window

The 'Edit Command' dialog box is similar to the 'New Command' window but includes pre-filled data and an 'Apply' button. It includes the following elements:

- Command:** A text input field containing 'Run Report'.
- Condition:** An empty text input field.
- Description:** An empty text input field.
- Timeout (s):** A text input field containing the value '300'.
- Enabled:** Radio buttons for 'Yes' (selected) and 'No'.
- Steps:** A text area containing the following commands:

```
ksc_run_jsp_report /web/knta/crt/rpt/RequestQuickViewReport.jsp
REPORT_ID=[RP.REPORT_SUBMISSION_ID]
USER_ID=[RP.CREATED_BY]
OUT_BASEFILE=[RP.FILENAME]
ksc_end_report_parameters
```
- Buttons:** 'Tokens', 'Special Cmd', and 'Show Desc' are on the left; 'OK', 'Apply', and 'Cancel' are on the right.
- Status:** A 'Ready' indicator at the bottom left.

Table 8-7. Command window field descriptions

| Field Name | Description |
|-------------|---|
| Command | Specify a brief name for the command. Type any alphanumeric string. |
| Condition | Specify the conditions that determine whether the command steps for the command are executed or not. See the <i>Commands, Tokens, and Validations Guide and Reference</i> for details on the types of conditions that can be used. |
| Description | Specify a brief description of the command. Type any alphanumeric string. |
| Timeout(s) | Specify the amount of time (in seconds) the command will be allowed to run before its process is terminated. This mechanism allows commands that are hanging, or taking much more than the normal amount of time, to be aborted. |
| Enabled | Indicate whether or not the command is enabled for execution. |

Security Tab

Use the **Security** tab to control which users can create or view reports of this report type. Security can be established, using one of the following options:

- Viewable by creator only
- Viewable by selected security groups
- Viewable by users with the System: Submit Reports access grant

View or modify each field on the Security tab, as described in [Table 8-8](#) on page 190.

➤ The report manager (any PPM Center user with the System: Edit All Reports access grant) has permission to override the security group settings.

Figure 8-10. Report Type window Security tab

The screenshot shows the 'Security' tab of the 'Report Type: My Request Detail Report' window. The 'Report Type Name' is 'My Request Detail Report' and the 'Reference Code' is 'MY_REQUEST_DETAIL_REPORT'. The 'Description' is 'View the contents of a release. Lists all requests, packages, and distributions associated with a release.' The 'Requires License' is set to 'Deployment Management' and is 'Enabled'. The 'Report Category' is 'Deployment Management'. The 'Security' tab is selected, and the 'Reports can be submitted and viewed by' dropdown is set to 'Only users in the allowed Security Groups'. Under 'Security Group Settings', the checkbox 'Users in the allowed Security Groups can submit, but each report can be viewed only by its creator' is checked. The 'Restricted Security Groups' list is empty, and the 'Allowed Security Groups' list contains 'PPM 6.0 Upgrade: Workbench Access', 'PPM Administrator', and 'PPM All Access Grants'. The 'Always restrict new Security Groups' checkbox is unchecked. The window has 'OK', 'Save', and 'Cancel' buttons at the bottom right.

Table 8-8. Report Type window Security tab field descriptions

| Field Name | Description |
|---|---|
| Reports can be submitted and viewed by | <p>Select the users who can use this report. Choices include:</p> <ul style="list-style-type: none"> • All users with Report Browsing access (meaning users with the System: Submit Reports access grant) • Only users in the allowed Security Groups |
| <p>The following fields are enabled only if the value for Reports can be submitted and viewed by is set to Only users in the allowed Security Groups.</p> | |
| Users in the allowed security groups can submit, but each report can only be viewed by its creator | Indicate whether the results of the report can be viewed only by its creator. |
| Restricted Security Groups | Select one or more security groups that are restricted from using this report type. |
| Allowed Security Groups | Select one or more security groups that are allowed to use this report type. |
| Always restrict new Security Groups | Indicate whether any new security groups are automatically added to the Restricted Security Groups list. |

Ownership Tab

Members of ownership groups are the only users who have the right to edit, copy, or delete this report type.

Use the **Ownership** tab to view and edit ownership groups for the given report type. View or modify each field on the **Ownership** tab, as described in [Table 8-9 on page 191](#).



See the *Security Model Guide and Reference* for more information about setting ownership for a new or existing report type.

Figure 8-11. Report Type window Ownership tab

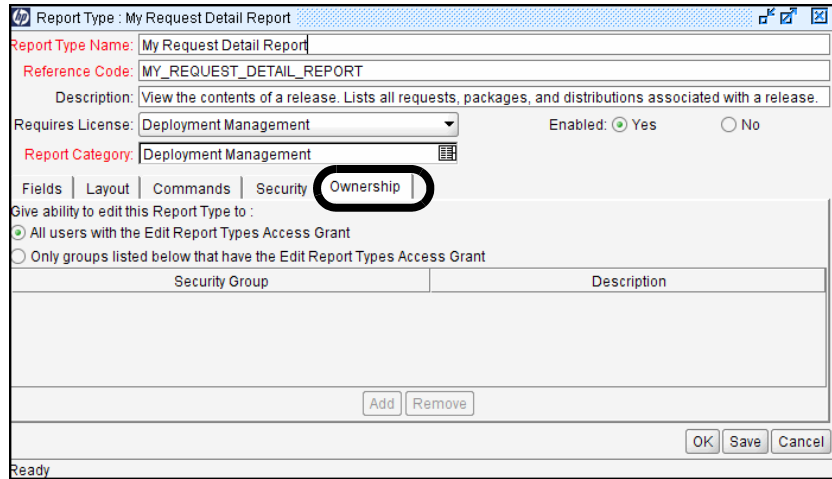


Table 8-9. Report Type window Ownership tab field descriptions

| Field Name | Description |
|--|---|
| Give ability to edit this Report Type to | <p>Indicate who should have the ability to copy, edit, or delete this report type. Choices include:</p> <ul style="list-style-type: none"> • All users with the Edit Report Types Access Grant. Enables all users with the Edit Report Type access grant. • Only Groups listed below that have the Edit Report Types Access Grant. Limits the users to members of the group listed in the panel below this field. Use the Add and Remove buttons to manage this list. |

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