HP Project and Portfolio Management Center

Software Version: 8.00

Getting Started Guide

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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:

h20230.www2.hp.com/selfsolve/manuals

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To find more information about access levels, go to:

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h20229.www2.hp.com/passport-registration.html

Contents

1 Introduction

Overview of HP Project and Portfolio Management Center

Welcome to HP Project and Portfolio Management Center!

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

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

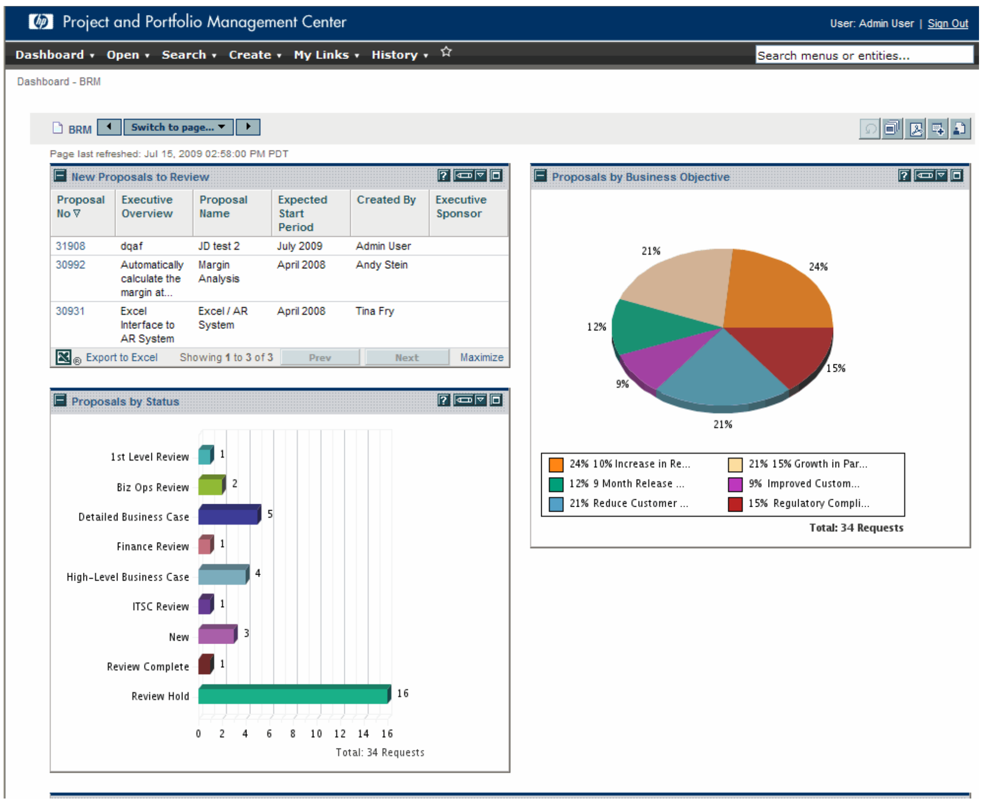
In addition to the standard user interface, some users require the PPM Workbench to accomplish certain tasks. Unlike the Web pages, which open in a Web browser, the PPM Workbench opens in its own window. Designed for more advanced users, the PPM Workbench is where much of PPM Center is configured. Configurators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

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

PPM Web Pages

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

Figure 1-1. PPM Center Web Pages



PPM Center Components

PPM Center has the following components:

- **PPM Dashboard.** The PPM Dashboard provides the core of the standard user interface. By using the PPM Dashboard, you can obtain accurate, up-to-the-minute status on your projects and deliverables. With the PPM Dashboard, project teams always know their current status. Managers gain real-time insight into progress and problems in the projects they manage. Executives can view all initiatives from an IT value perspective at a high level, which helps to ensure alignment with the company's overall strategic direction.

- **Navigation path.** Above the PPM Dashboard is the navigation path. The navigation path lists the pages opened during the current PPM Dashboard session. Users can access previously visited pages by selecting entries on the navigation path.

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

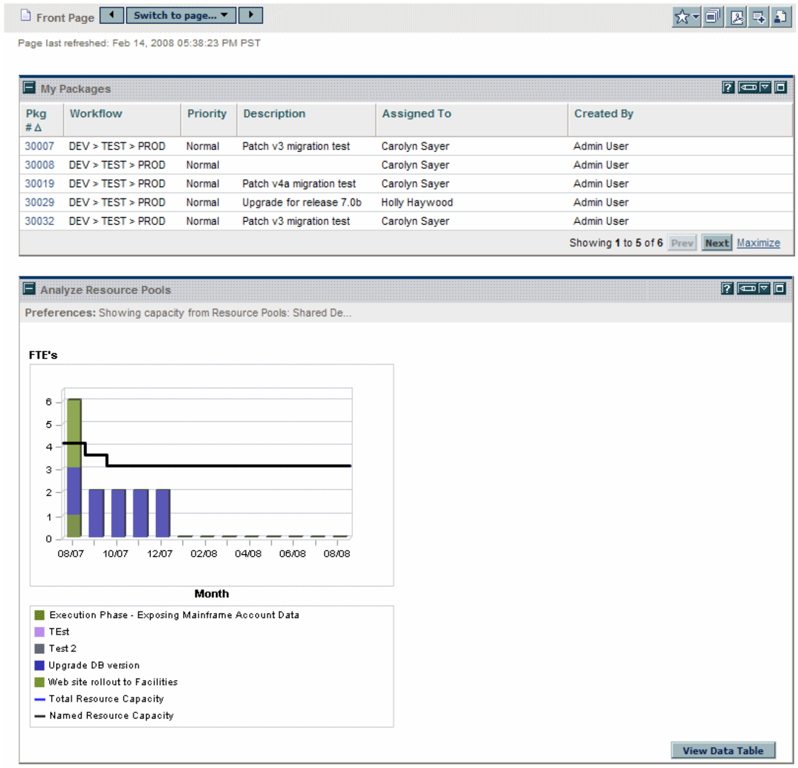
➤ If you have a pop-up blocker or download blocker active on your Web browser, you may have difficulties using the Web pages.

PPM Dashboard Pages

PPM Dashboard pages are a way of organizing application data. You can choose to devote one PPM Dashboard page to project information and designate another as reserved for a PPM Center product, such as HP Demand Management or HP Portfolio Management. How you organize your data is entirely up to you.

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

Figure 1-2. Typical PPM Dashboard page



Types of PPM Dashboard Pages

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

- **Default PPM Dashboard page.** The default PPM Dashboard page is the first PPM Dashboard page you see when you log on to PPM Center. For users who have personalized their PPM Dashboard, it is the first private page on the list; for new users, it is the first shared page on the list.

- **Private PPM Dashboard pages.** Private PPM Dashboard pages are created and configured by you. You can add portlets to a private page, move it up or down in the list of pages, or delete it.

- **Shared PPM Dashboard pages.** Shared PPM Dashboard pages are configured by your application administrator and published to one or many users. You cannot edit a shared PPM Dashboard page. Shared PPM Dashboard pages are created as modules. For detailed information on creating modules, see the *Creating Portlets and Modules* guide.

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

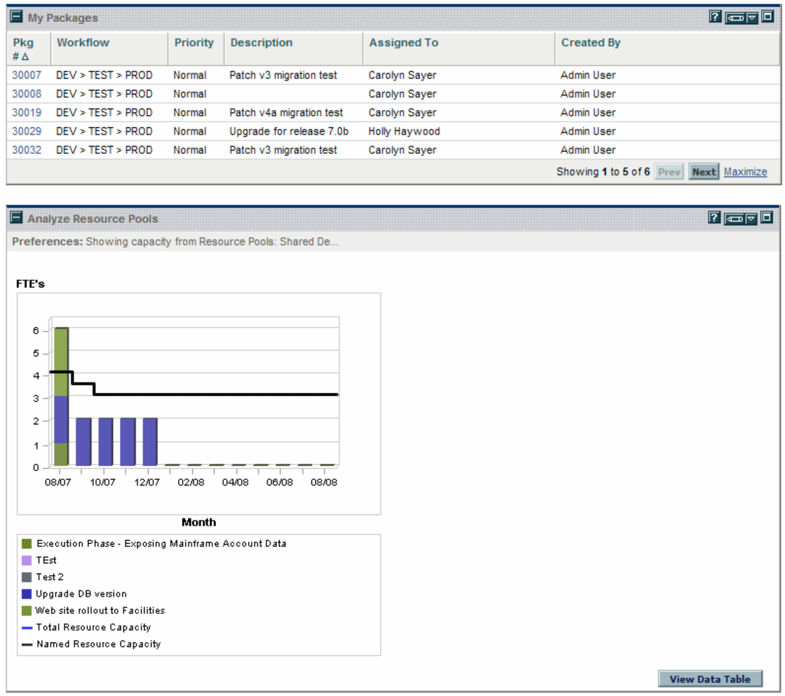
Portlets

Portlets reside on PPM Dashboard pages and display real-time data. Portlets are very configurable, enabling you to filter through all the data in the system to find the information you need. There are two basic types of portlets:

- **List portlets.** List portlets present data in tabular form using rows and columns. *Figure 1-3* shows the Request List portlet.

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

Figure 1-3. Typical portlets



You can personalize a portlet to meet your specific requirements by using the portlet's edit page. Every portlet edit page has a **Preferences** section. The **Preferences** section enables you to configure the filtering and sorting of data and to select how to display the data. If your portlet is a list portlet, a **Choose Display Columns** section is displayed. The **Choose Display Columns** section enables you to choose which columns will appear in the portlet.

PPM Workbench

For most PPM Center users, tasks are started and completed on the Web pages; some users, however, require the PPM Workbench for their work. The PPM Workbench is designed to help application administrators, configurators, and advanced users configure PPM Center.

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

The PPM Workbench has the following components:

- **PPM Workbench window.** PPM Workbench windows are used to find and act on configuration entities, such as request types, object types, and workflows. Each configuration entity has its own unique PPM Workbench window. You can reach a configuration entity Workbench window using the shortcut bar.

- **Shortcut bar.** The shortcut bar is used to organize the configuration entity Workbench windows. Each configuration entity Workbench window belongs to a screen group, such as Demand Management, Time Management, or Configuration Management. When a screen group is selected, the associated PPM Workbench windows are displayed as icons in the shortcut bar.

- **PPM Workbench menu.** The PPM Workbench menu provides configuration functionality to the PPM Workbench. This includes such things as user profile settings and regional settings. In addition, some PPM Workbench windows, such as packages, add an extra menu when that PPM Workbench window is selected.

Viewing Product Information and Online Documentation

You can access the PPM Center Documentation Library by selecting **Open > Product Information > Library** from the PPM Center menu bar. The **Product Information** menu provides you with access to the Documentation Library and the About HP Project and Portfolio Management Center page.

Accessing Documentation

To find the available documentation:

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

   The Documentation Library opens.

Figure 1-4. Documentation Library page

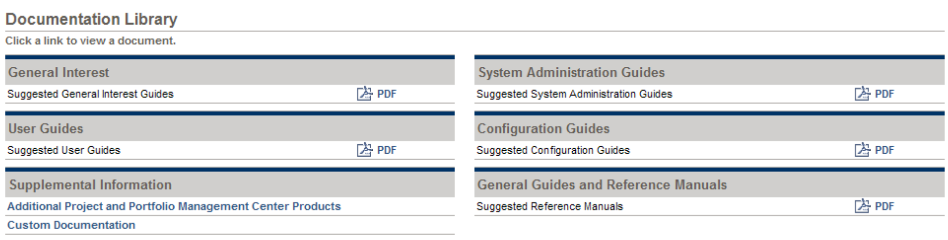


Figure 1-4 shows the Documentation Library page available when PPM Center is first installed. Each document displayed includes a list of suggested guides containing pertinent information for the selected topic area. Your system administrator can customize this page to display only the documents relevant for your organization. See *Customizing the Standard Interface* for more information about customizing your Documentation Library page.

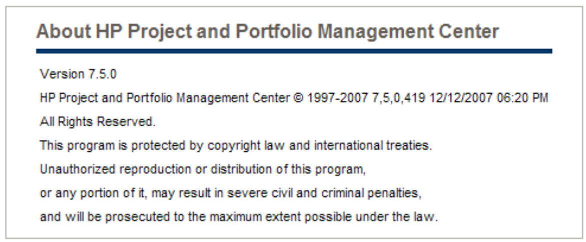
You can also view the available documentation from the PPM Workbench. Select **Open > Product Information > Library** from the PPM Workbench.

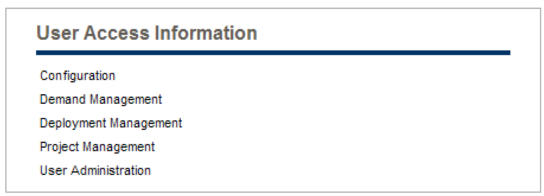
Viewing Version and User Access Information

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

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

   The About HP Project and Portfolio Management Center page opens.





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

2 Using the Web Pages

Logging On and Off PPM Center

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

- PPM Center Web address (URL)
- Username
- Password
- At least one PPM Center product license

➤ For information about customizing the display of the PPM Center Web pages, see the *Customizing the Standard Interface* guide.

Logging On to PPM Center

To log on to the PPM Center:

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

   The PPM Center Logon page opens.

2. Enter your username, password, and session language in the appropriate fields.

   If you want the server to retain a password, select the **Remember my logon** check box. Once this check box is selected, you do not have to enter a password each time you log on.

   For more information about session languages, refer to the *Multilingual User Interface Guide*.

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

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

Logging Off PPM Center

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

Figure 2-1. Logging off PPM Center

PPM Center Menu Bar

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

For more information on the PPM Workbench, see *Using the PPM Workbench* on page 73.

Creating Requests, Packages, and Other Entities

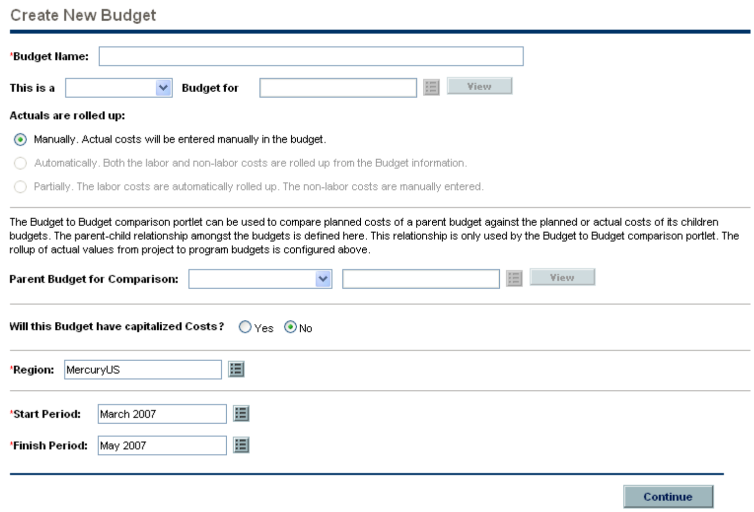
Entities are the requests, packages, projects, and other objects that you work with in PPM Center. The entities you can create depend on the access grants assigned to you by the application administrator.

To create an entity:

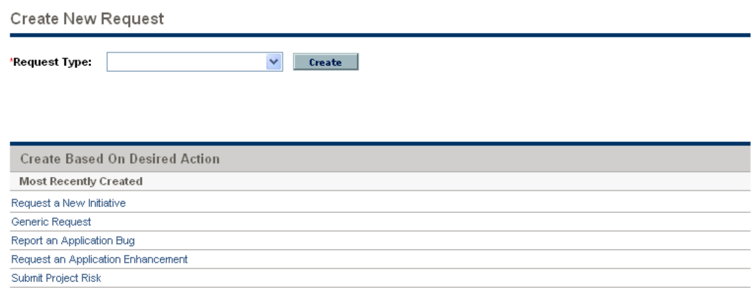
1. Log on to PPM Center.
2. From the menu bar, select the appropriate product area in which you want to work.

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

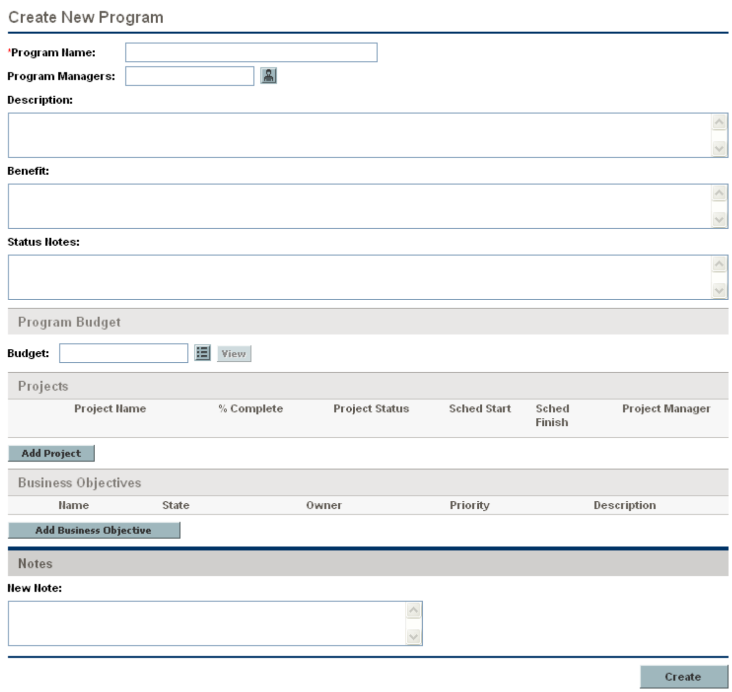
   The create page specific to the type of entity selected opens. The create page includes the fields associated with the entity type. Not all entities are alike. Some entities have a single entity type, such as skills.



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



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



Searching for Requests, Packages, and Other Entities

You can use a search to find existing entities within PPM Center. Searching for entities does not use the PPM Center document management capabilities.

Running New Searches

To run a new search:

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

   For example, to search for requests, select **Open > Demand Management > Search Requests.** The Search Requests page opens.

   To search for a project, select **Open > Project Management > Projects & Tasks > Search Projects.** The Search Projects page opens.

   The search page includes the fields associated with the search type.
3. On the search page, fill in all the required parameters and any optional parameters, and then click **Search.**

   The Search Results page displays the results of your search.

Defining Customized Searches

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

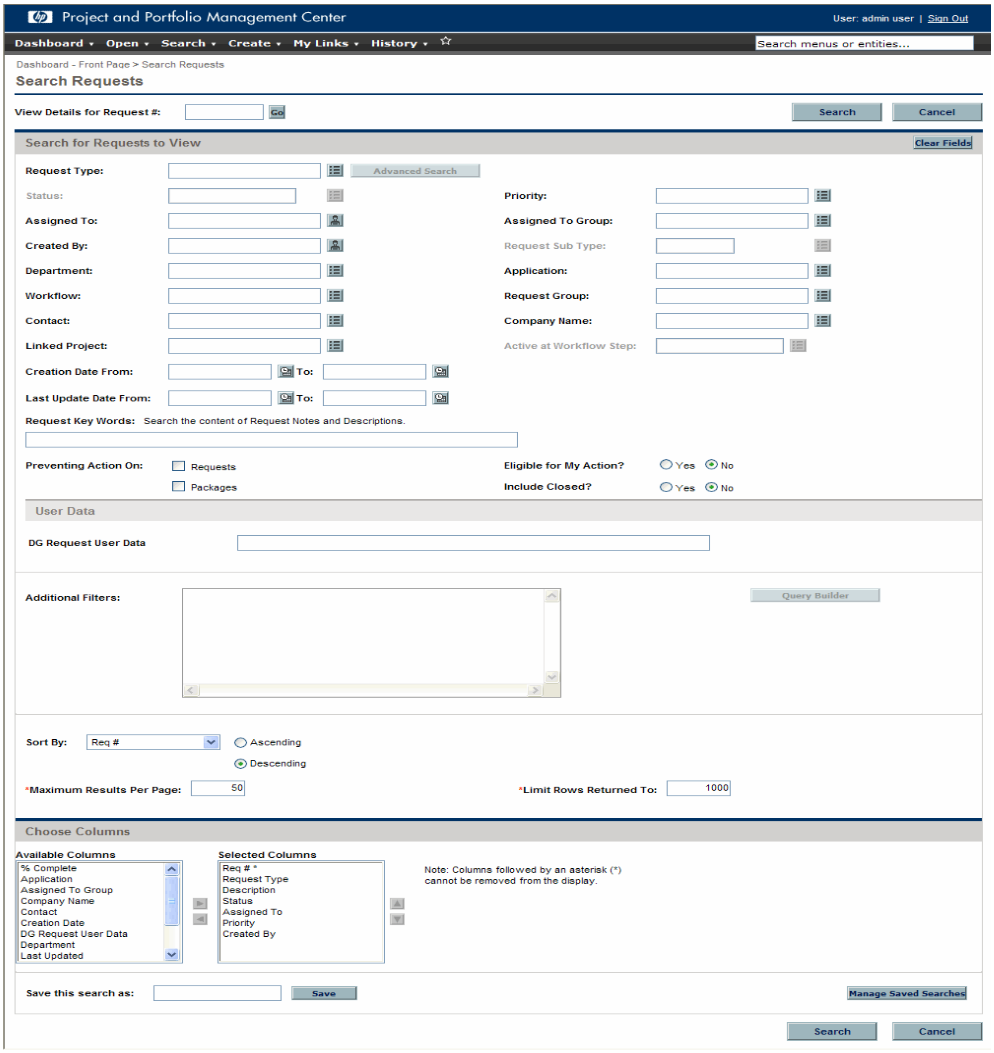
For example, you can search for all Enhancement requests with a **Description** that contains the words “Release Notes” and that have a **Priority** marked **Critical.**

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

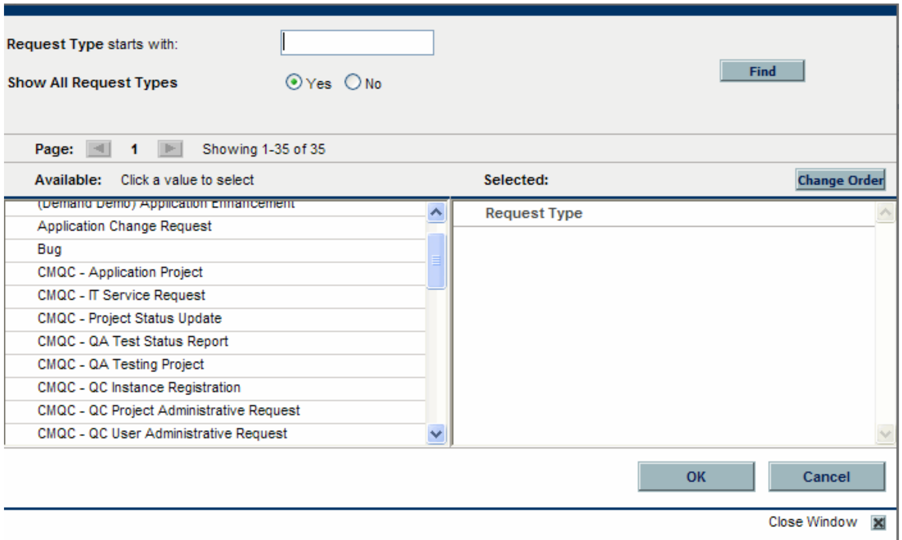
To define a new query by using the Query Builder:

1. Log on to PPM Center.
2. From the menu bar, select **Open >Demand Management > Search Requests.**

   The Search Requests page opens.



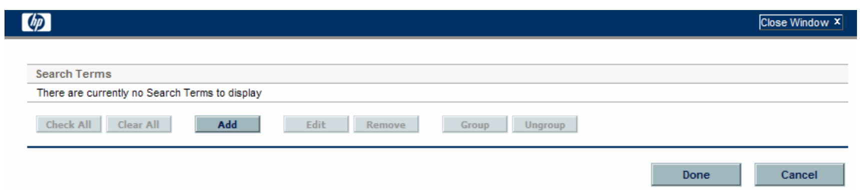
3. Provide a value for the **Request Type** field. You can also click the List button to the right of the field, which opens a window showing the available request types to choose from.



After you enter a request type, the **Query Builder** button is enabled.

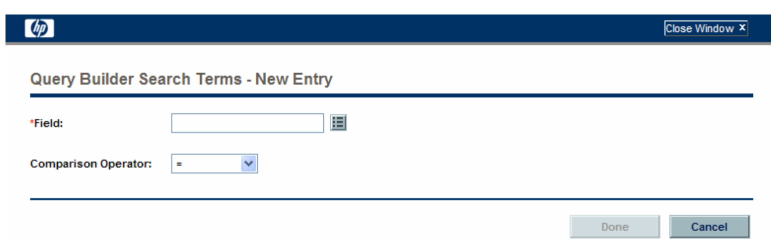
4. Click **Query Builder.**

   The Query Builder Search Terms window opens.



5. Click **Add.**

   The Query Builder Search Terms - New Entry window opens.



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

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

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

7. Click **Done.**

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

8. Click **Done.**

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

9. Click **Search** to run the search using the newly defined query.

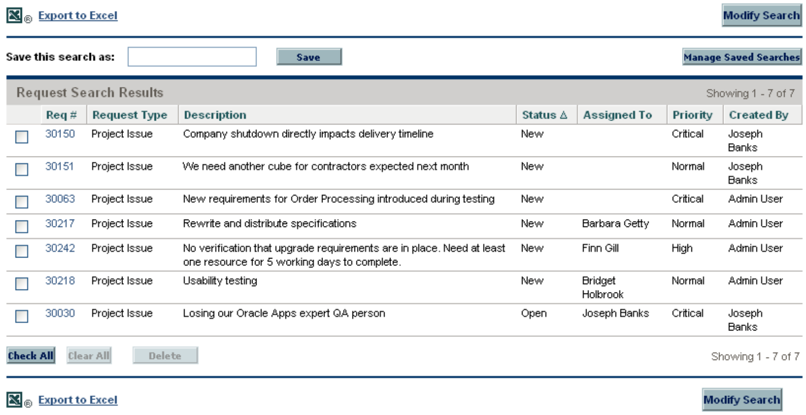
Saving Searches

You can save and rerun commonly run searches for requests.

To save a search:

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

   For instruction on how to run a search, see *Running New Searches* on page 26. The Search Results page loads, displaying the results of your search.



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

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

   A window opens that displays the results of the save operation.

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

Running Saved Searches

To run a saved search:

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

   The saved search runs. The Search Results page displays the results of your search.

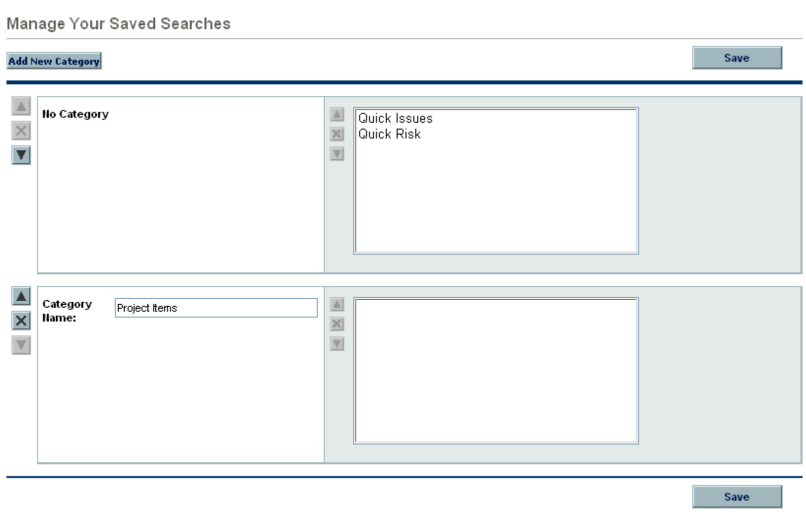
Managing Saved Searches

You can move between saved search categories to manage your saved searches. You can also delete saved searches.

To manage or delete a saved search:

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

   The Manage Your Saved Searches page opens.



3. Move or delete a saved search.

- To move a saved search:

  i. Select a saved search.

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

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

     You can move between categories or to different saved searches within a category.

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

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

- To delete a saved search:

  i. Select a saved search.

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

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

     The selected saved search is deleted.

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

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

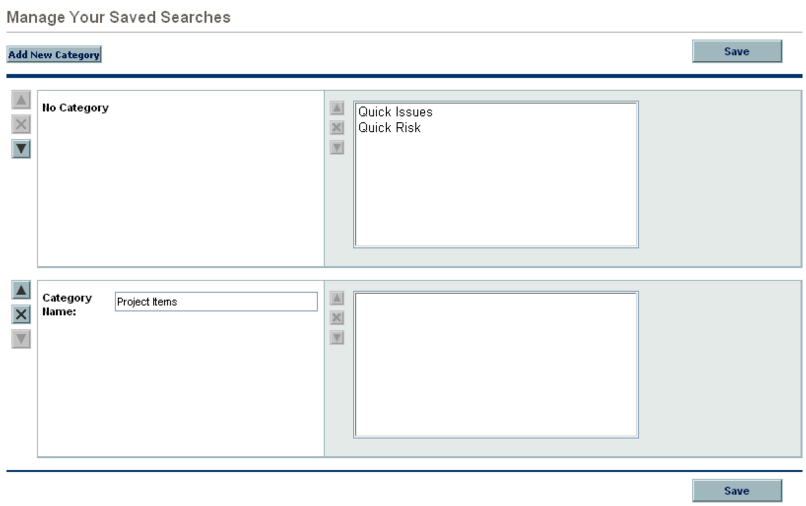
Managing Saved Search Categories

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

To manage a saved search category:

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

   The Manage Your Saved Searches page opens.



3. Create, move, or delete a saved search category.

   - To create a saved search category:

     i. On the Manage Your Saved Searches page, click **Add New Category.**

        A new category section opens.

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

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

- To move a saved search category:

  i. In a **Category** section to move, click a **Move Arrow** icon to move the category.

     The **Move Arrow** icons available to a category are always enabled.

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

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

- To delete a saved search category:

  i. In a **Category** section to delete, click the **Delete** icon to delete the category.

     When a **Delete** icon is enabled, the category can be deleted. If the **Delete** icon is not enabled, you cannot delete the category.

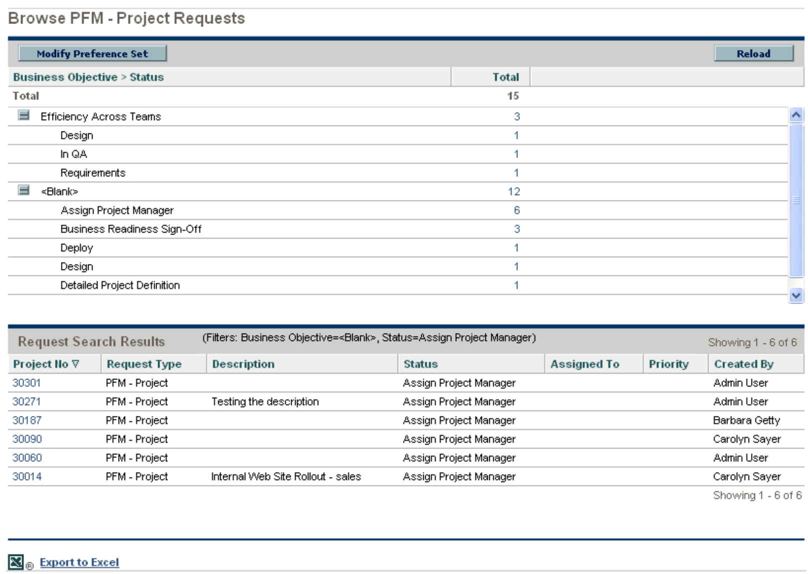
  ii. On the Manage Your Saved Searches page, click **Save.**

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

Searching for Requests by Type

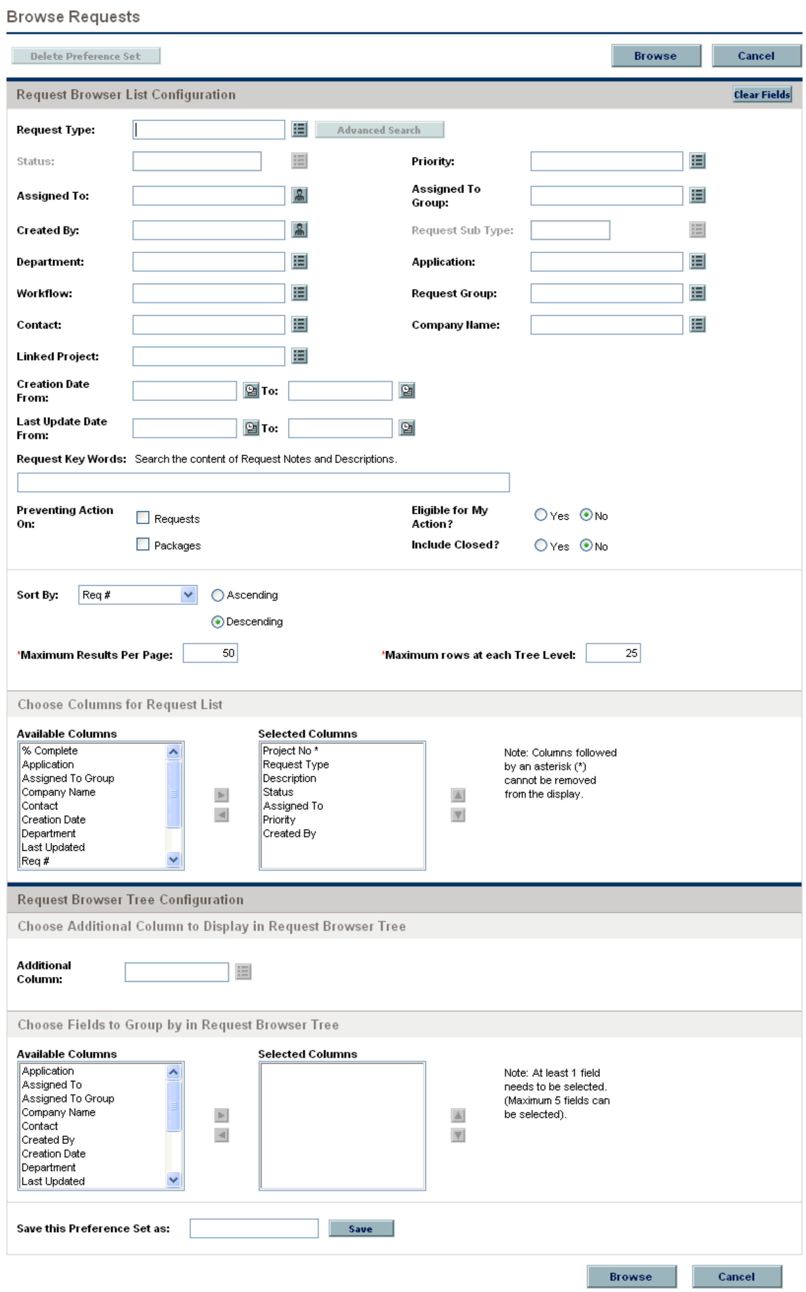
You can use the Request Browser to search for requests of a specific type. The Request Browser enables you to view sets of requests that are hierarchically grouped by fields you specify. You can expand each group to view its request request list by clicking a group’s numerical total. *Figure 2-2* shows an example of typical Request Browser results.

Figure 2-2. Request Browser results



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

Figure 2-3. Request Browser search



Specify search criteria in the Request Browser.

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

The following Request Browser features help to organize your results:

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

Running Reports

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

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

Running New Reports

To run a new report:

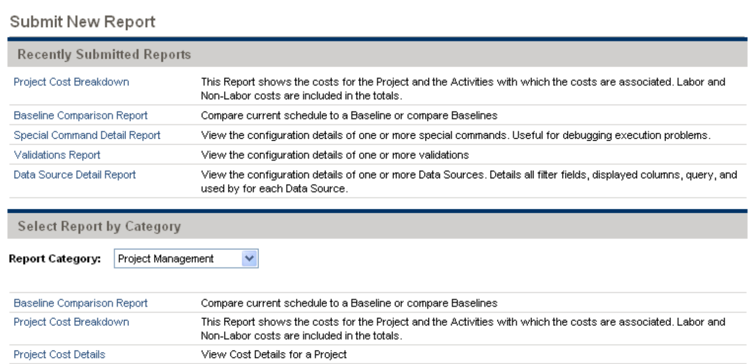
1. Log on to PPM Center.
2. From the menu bar, select **Open > Reports > Create Reports.**

   The Submit New Report page opens.

3. Select a report.

   There are two ways in which to select a report:

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



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

   The Report Submitted page opens prior to the report.

Opening Existing Reports

After you or another user run a report, PPM Center saves that report, allowing you or others to view the report at a later date.

To open an existing report:

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

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

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

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

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

   The previously run report is opened.

Changing Your Settings

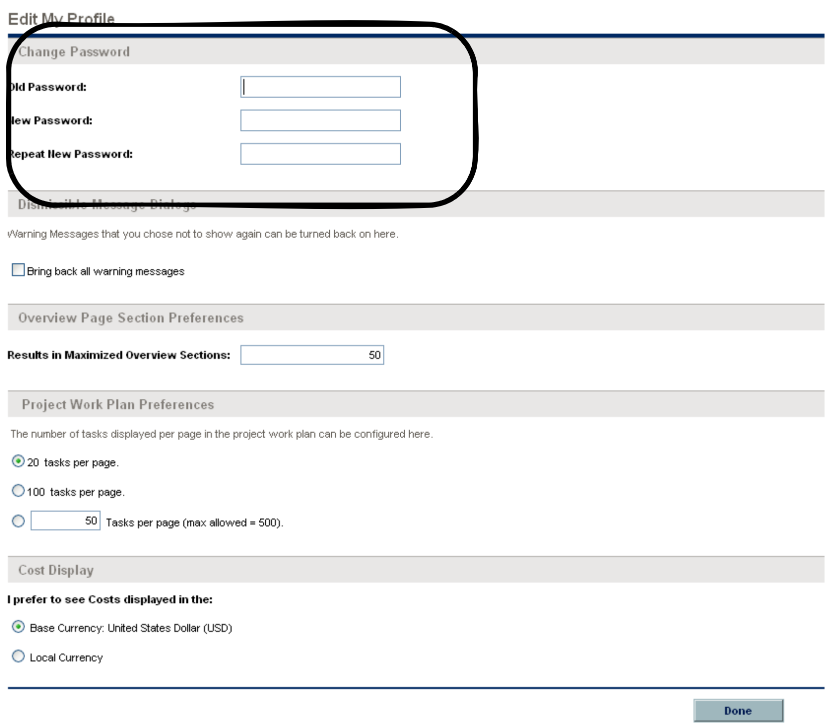
By using the **Open > Administration** menu, you can adjust several interface settings to fit your own preferences. You can also change your password.

Changing Your Password

To change your password:

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

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



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

   The new password is accepted.

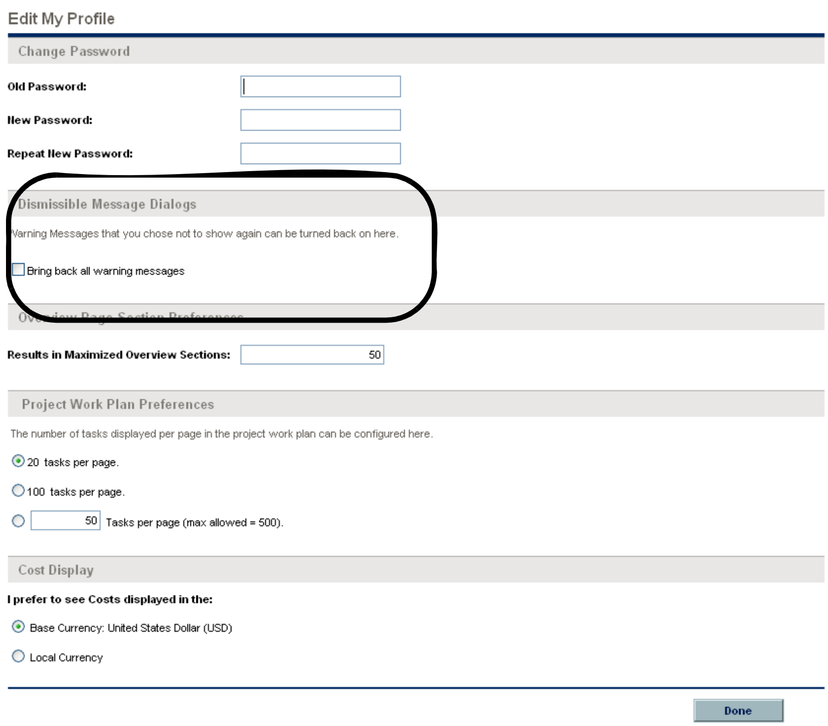
Setting Warning Message Display

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

To reactive warning messages:

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

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



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

   Warning messages will display again.

Setting Maximized Views for Portlets

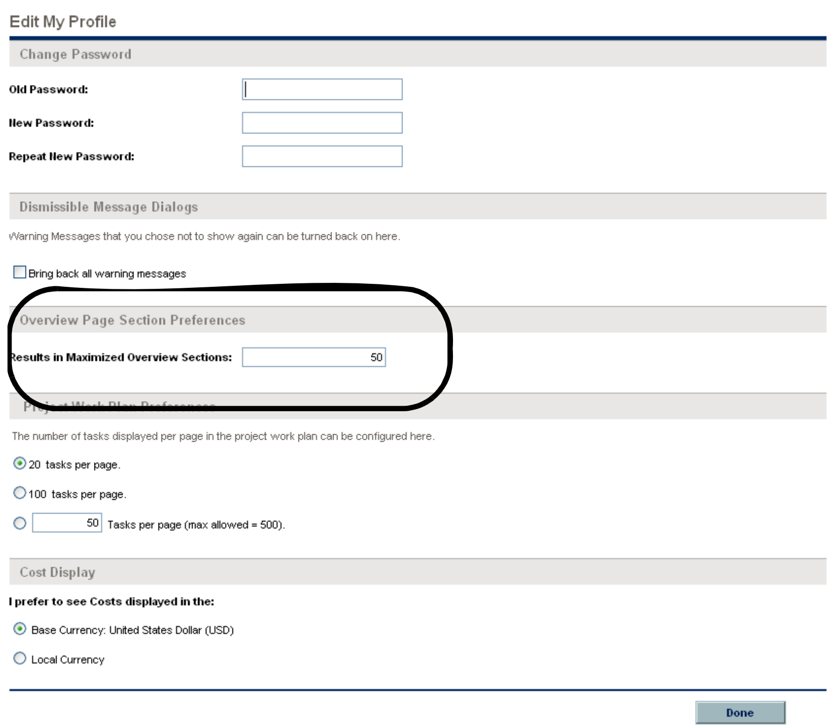
A maximized view for a portlet displays more of the data gathered from the system than in the normal view. The number of rows displayed in the maximized view can be configured to be greater than in the normal view.

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

To change your portlet's maximized view setting:

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

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



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

4. Click **Done.**

   The new portlet maximized view setting is accepted.

Setting Work Plan Page View Preferences

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

Setting Cost Displays

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

Setting Regional Settings

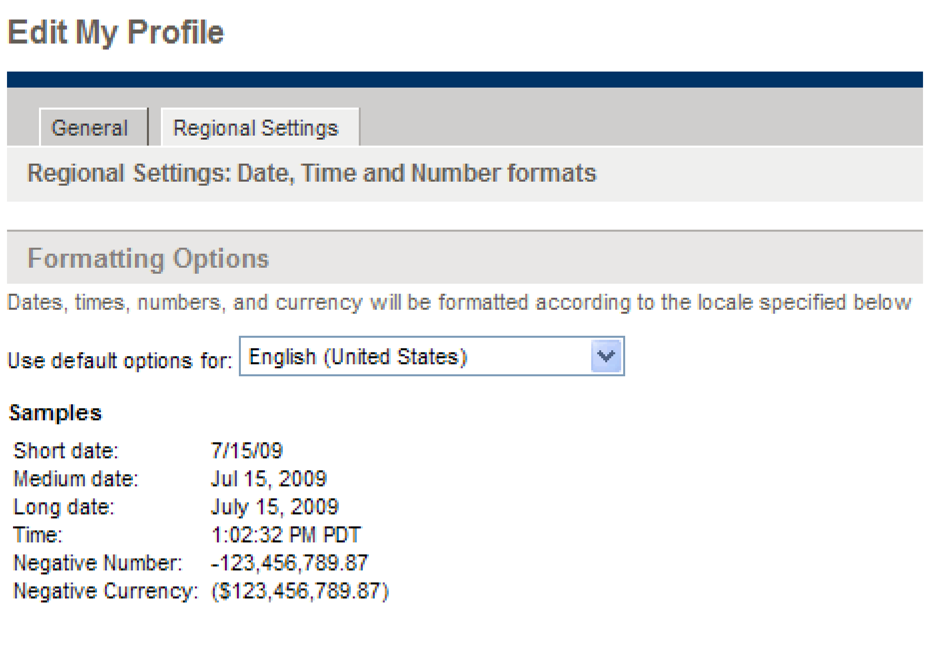
You can change the display format of dates, times, numbers, and currency by editing the regional settings on the Regional Settings tab of the Edit My Profile page. These settings also determine the display of these items in email notifications by the system. For more information about regional settings and local currency display, see *Setting Cost Displays* on page 43.

(Windows only) To export data to Microsoft Excel or synchronize data with Microsoft Project,your PPM Center regional settings preference must match that of the Windows environment on which you are performing the data export or synchronization. This match ensures that Microsoft Excel or Microsoft Project can interpret dates and numbers correctly.

To set regional settings:

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

   Change your regional settings on the **Regional Settings** tab.



3. In the **Use Default Options For** list, select the locale (language name/ geography) that you want to use for display of date, time, and currency values.

4. Click **Done.**

   The new locale is accepted.

> If your system has multiple languages installed, see the *Multilingual User Interface Guide* for more information.

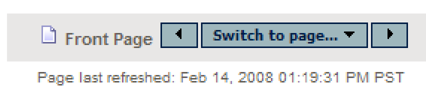
Using the PPM Dashboard

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

Opening PPM Dashboard Pages

Every PPM Dashboard can have one or more PPM Dashboard pages. A label a the top of each PPM Dashboard page identifies the page. To move from one PPM Dashboard page to another, click **Switch to page** and select the desired page (see *Figure 2-4*). You can click the arrow icons to either side of **Switch to page** to move through PPM Dashboard pages sequentially.

Figure 2-4. Buttons for switching between PPM Dashboard pages



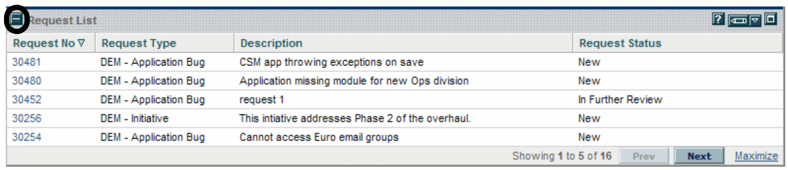
You can also select **Dashboard**, and then select the desired page from the menu bar.

Setting Portlet Views

Portlets can be set to one of the following views:

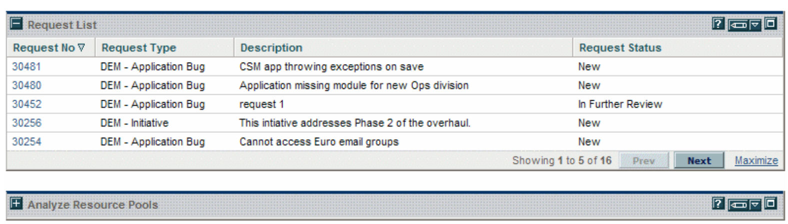
- **Minimize view.** Only the portlet's title bar is visible. A portlet retains a minimized view between PPM Center sessions. To minimize a portlet, in the portlet's normal view, click the **Minimize** icon to the left of the portlet name in the title bar (see *Figure 2-5*).

Figure 2-5. Portlet minimize icon



- **Normal view.** The default view of the portlet. For list portlets, the default rows and columns are visible in the portlet. For chart portlets, the chart or graph is visible. A portlet retains a normal view between PPM Center sessions. To return a minimized portlet to the normal view, in the portlet's minimized view, click the **Normal** icon (see *Figure 2-6*).

Figure 2-6. Normal and minimized views of portlets



- **Maximize view.** A maximized view of a portlet opens in a new page. A maximized view of a portlet contains more rows and columns than a portlet in a normal view. Maximized views of portlets are not retained between PPM Center sessions. To see a portlet's maximized view, in the portlet's normal view, click the **Maximize** icon (see *Figure 2-7*). To return a maximized view portlet to the normal view, in the portlet's maximized view, click **Back** (see *Figure 2-8*).

Figure 2-7. Portlet maximize icons

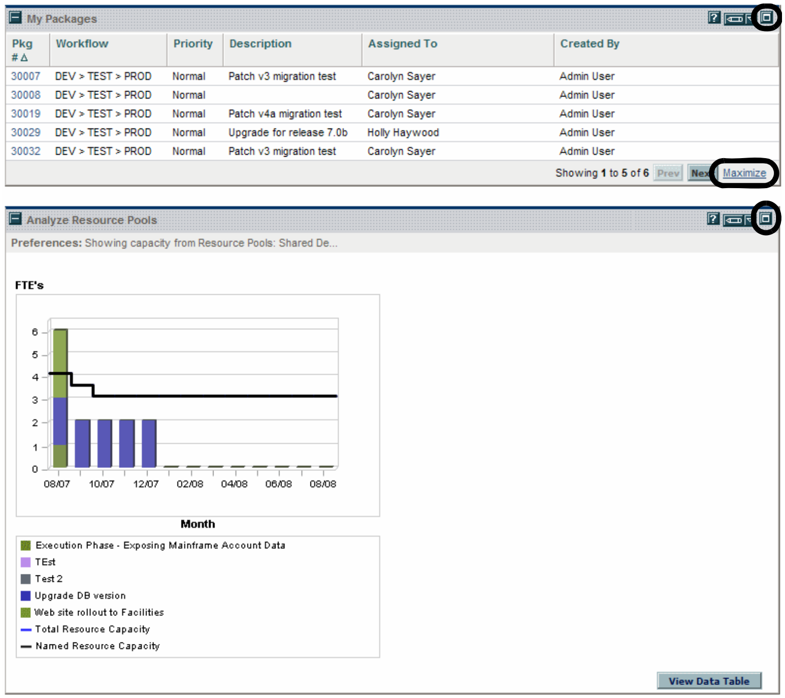
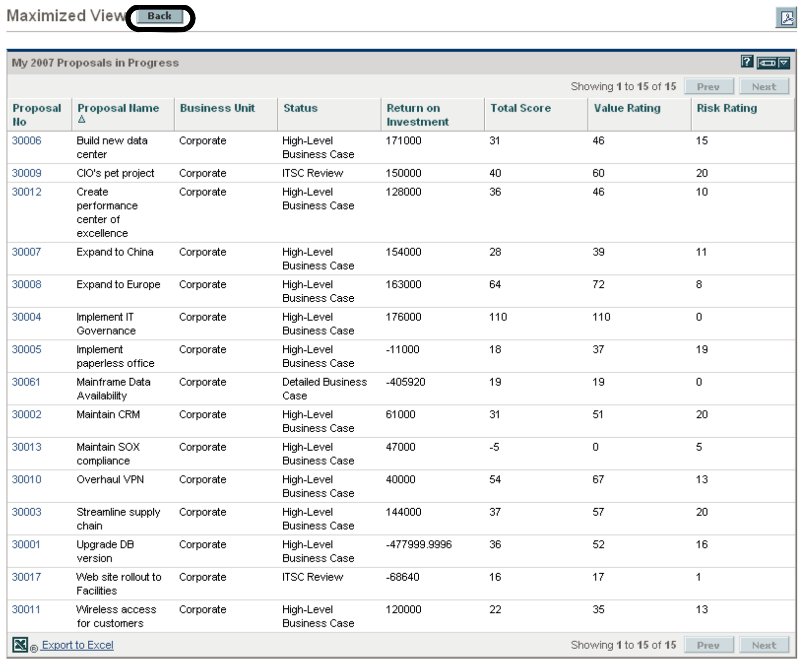


Figure 2-8. Portlet maximized view


Maximized View Back

My 2007 Proposals in Progress

Showing 1 to 15 of 15 Prev Next

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

Export to Excel Showing 1 to 15 of 15 Prev Next

Arranging Data in List Portlets

For list portlets, you can personalize the way that gathered data is organized and presented by using the portlet's edit page settings. You can also temporarily change the way the data is presented by using the portlet's **Sort** icon (see *Figure 2-9*).

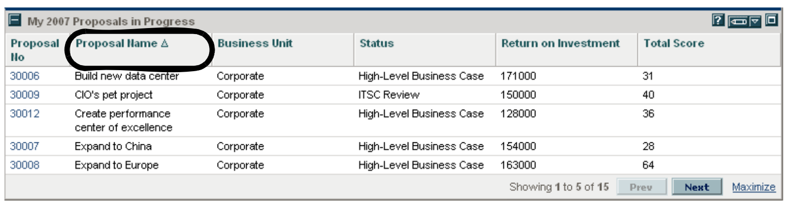
- To move the **Sort** icon from column to column, click a column's heading. The **Sort** icon will move to that column. The data displayed in the portlet will then be sorted by that column.

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

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

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

Figure 2-9. Sort icon

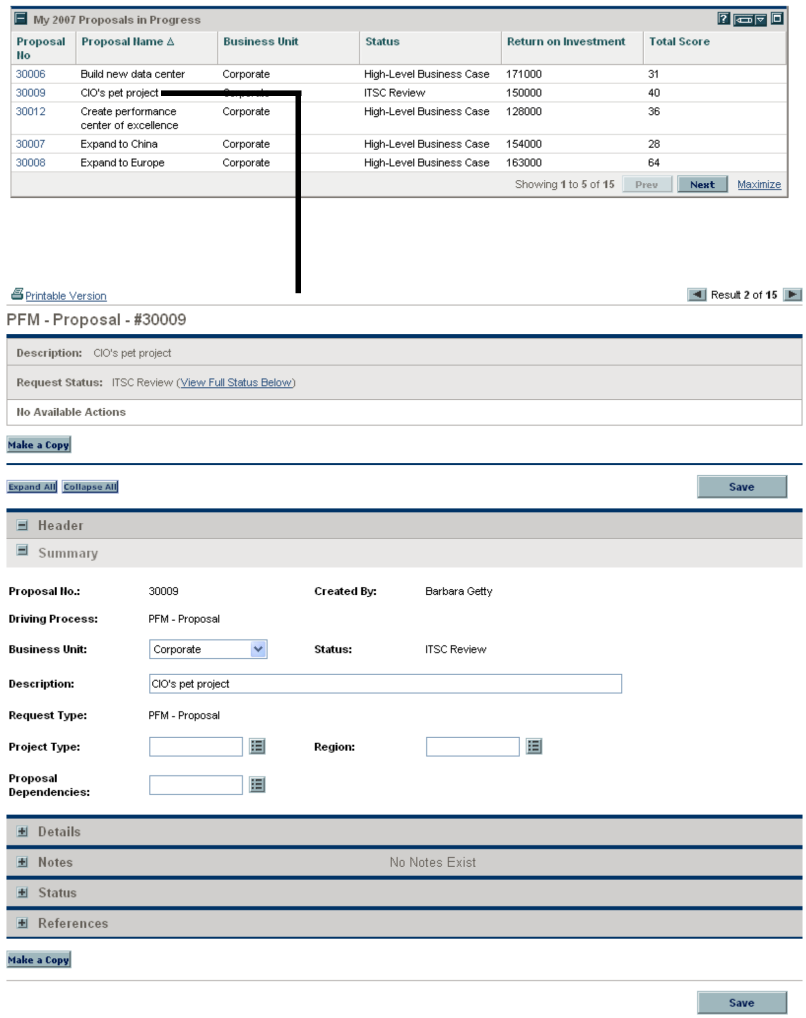


Drilling Down from Portlets

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

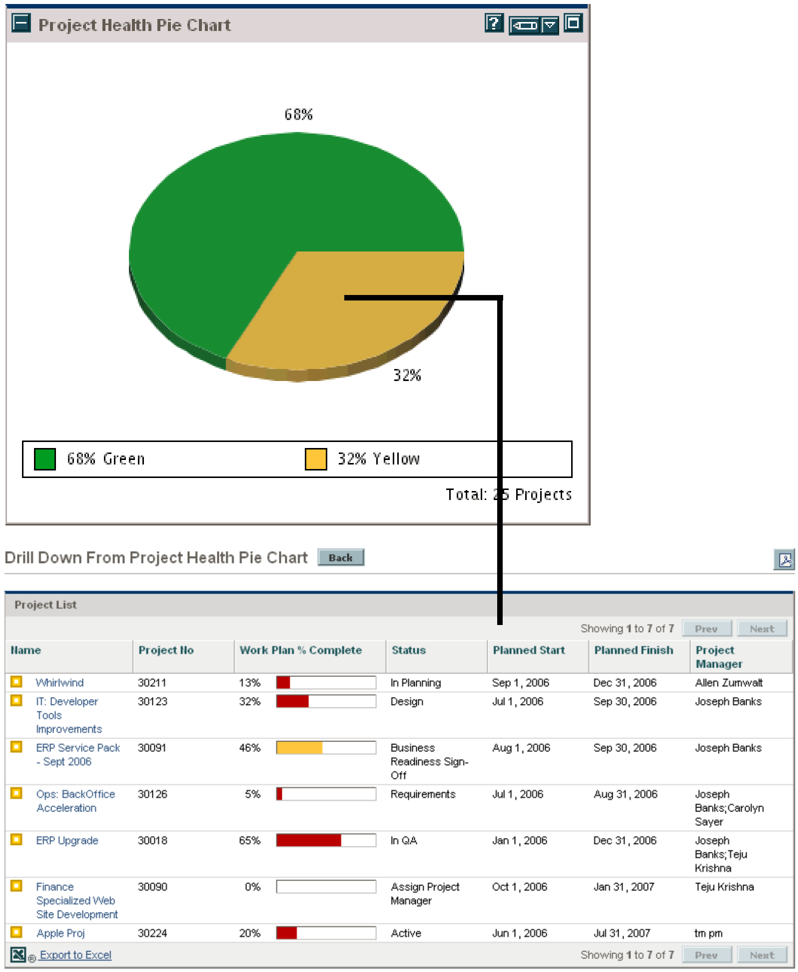
- To drill down from a list portlet, click a linked entry.

Figure 2-10. Drilling down from a list portlet



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

Figure 2-11. Drilling down from a chart portlet

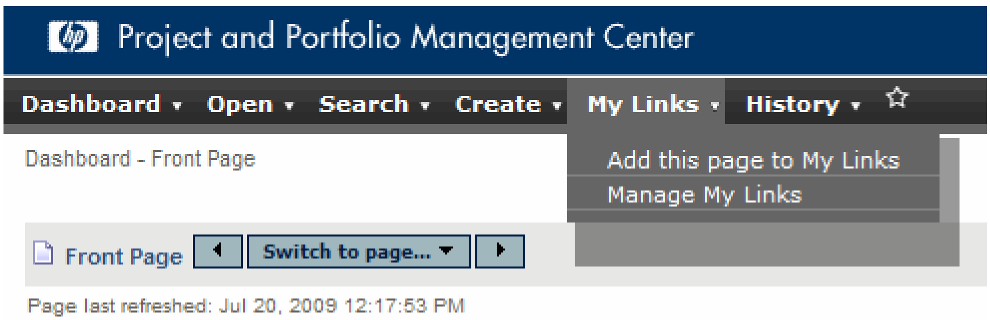


Name	Project No	Work Plan % Complete	Status	Planned Start	Planned Finish	Project Manager
Whirlwind	30211	13%	In Planning	Sep 1, 2006	Dec 31, 2006	Allen Zumwalt
IT: Developer Tools Improvements	30123	32%	Design	Jul 1, 2006	Sep 30, 2006	Joseph Banks
ERP Service Pack - Sept 2006	30091	46%	Business Readiness Sign-Off	Aug 1, 2006	Sep 30, 2006	Joseph Banks
Ops: BackOffice Acceleration	30126	5%	Requirements	Jul 1, 2006	Aug 31, 2006	Joseph Banks;Carolyn Sayer
ERP Upgrade	30018	65%	In QA	Jan 1, 2006	Dec 31, 2006	Joseph Banks;Teju Krishna
Finance Specialized Web Site Development	30090	0%	Assign Project Manager	Oct 1, 2006	Jan 31, 2007	Teju Krishna
Apple Proj	30224	20%	Active	Jun 1, 2006	Jul 31, 2007	tm pm

Maintaining a My Links List

If you have created many personalized PPM Dashboard pages and access some pages more than others, you can create a My Links list. Like the Favorites list of a Web browser, you can create a list of links to your most accessed PPM Dashboard pages.

Figure 2-12. My Links page list



You can manage your My links list by clicking **My Links > Manage My Links**. By clicking the star-shaped My Links icon, you can choose to add the current PPM Dashboard page to your My Links list.

The maximum number of links that you can add to your My Links list is 100 by default. If you require additional links, you can change the maximum allowed by modifying the the server.conf parameter called MY_LINKS_MAX_COUNT.

Adding Pages to Your My Links List

You can add a PPM Dashboard page or URL to your My Links list. To add the PPM Dashboard page you are currently viewing, do either of the following:

- Click the star-shaped **My Links** icon. The current page is appended to your My Links list.
- Click **My Links > Add This Page to My Links**. The current page is appended to your My Links list.

Removing Pages from Your My Links List

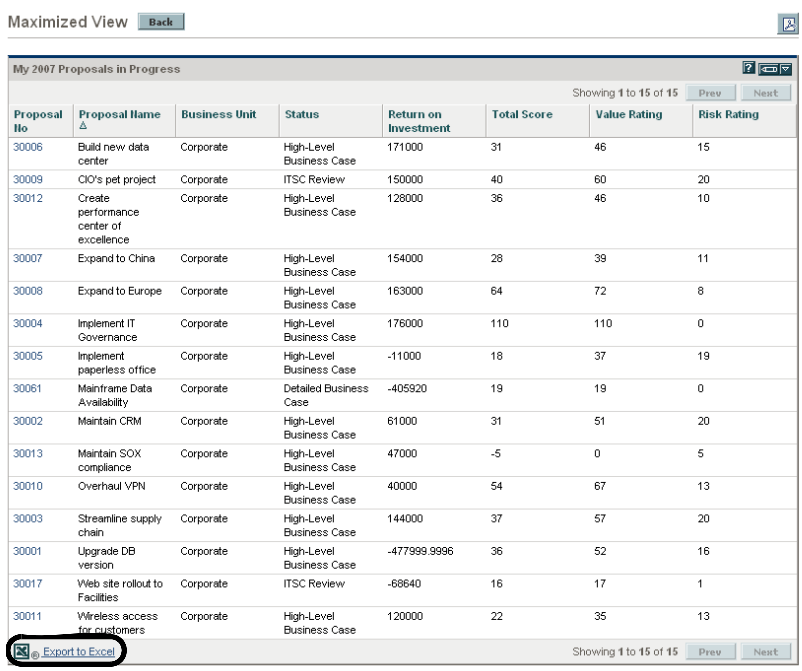
You can remove a PPM Dashboard page or URL from your My Links list. To remove PPM Dashboard pages, click **My Links > Manage My Links**, and then select which page to remove. Click **Remove** to remove the selected page.

Exporting Data to Excel Spreadsheets

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

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

Figure 2-13. Exporting data to Excel



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

To maximize spreadsheet performance, you may want to configure the Internet options of your Web browser. See the *HP Project Management User's Guide* for more information.

Exported Data Translation

When a portlet is in its maximized state, you can export the data into an Excel spreadsheet. Excel translates the exported data into the various formats with a few exceptions. The following is a list of those exceptions:

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

Cycling Through PPM Dashboard Pages Automatically

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

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

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

   The Cycle Pages dialog box opens.
3. Select the following settings:
   - Time interval
   - Whether to display using the full screen

4. Click **Start.**

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

Exporting PPM Dashboard Pages to PDF Files

If your system has multiple languages installed, see the *Multilingual User Interface Guide* for information about specific font requirements in exporting multiple language pages to PDF.

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

To export a PPM Dashboard page to a PDF file:

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

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

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

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

Viewing Module Comments

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

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

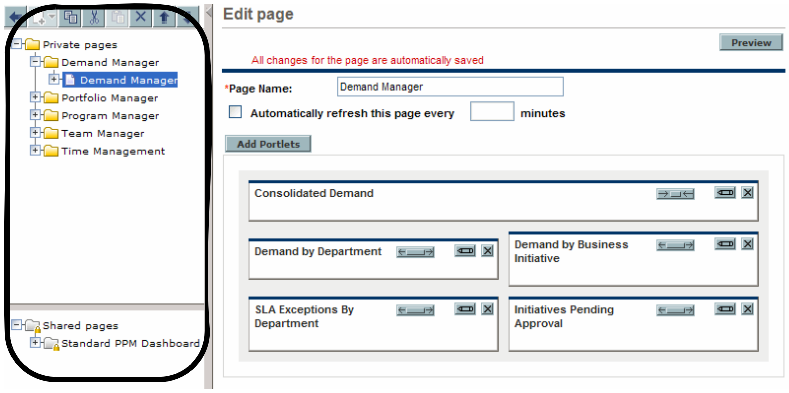
Personalizing the PPM Dashboard

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

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

You can personalize your PPM Dashboard by using the Personalize Dashboard page.

Figure 2-14. Personalize PPM Dashboard page



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

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

Adding PPM Dashboard Pages

When adding PPM Dashboard pages, you can add:

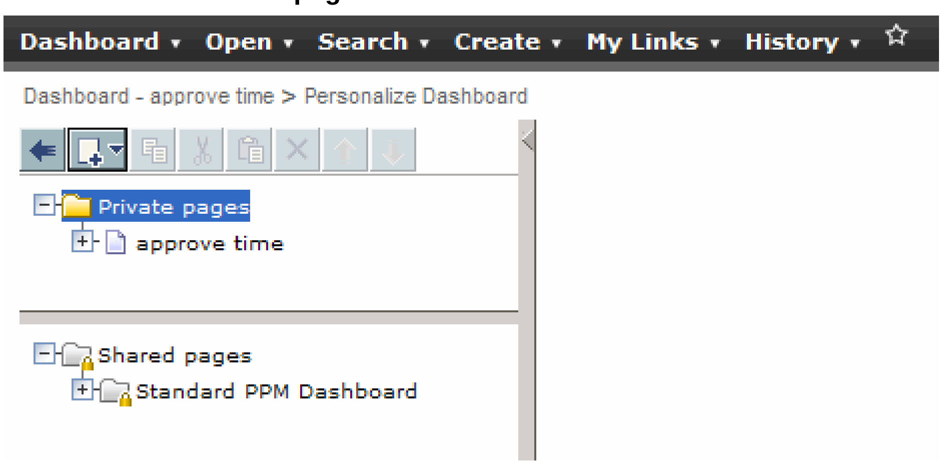
- Blank PPM Dashboard pages
- Preconfigured PPM Dashboard pages

To add a PPM Dashboard page:

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

   The Personalize Dashboard page opens.
3. Add a PPM Dashboard page.
   - To add a blank PPM Dashboard page:

     i. Select **Private pages**.



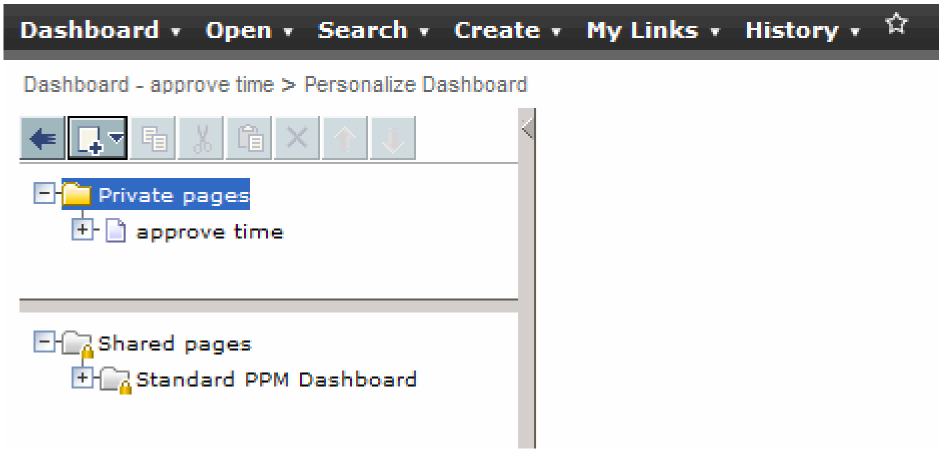
ii. Click the **Add New** icon.

iii. Select **New Page.**

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

- To add a preconfigured PPM Dashboard page:

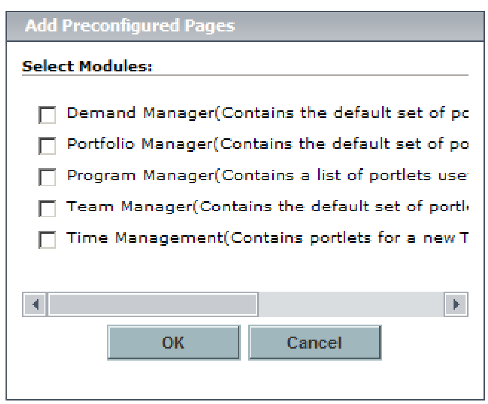
i. Select **Private pages**.



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

iii. Select **Add Preconfigured Pages.**

A list of available preconfigured PPM Dashboard pages is displayed.



iv. Select a preconfigured PPM Dashboard page (or pages) and click **OK.** The page or pages you selected are added to your PPM Dashboard.

The changes to your PPM Dashboard are automatically saved.

Copying, Moving, and Deleting PPM Dashboard Pages

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

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

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

   The changes to your PPM Dashboard are automatically saved.

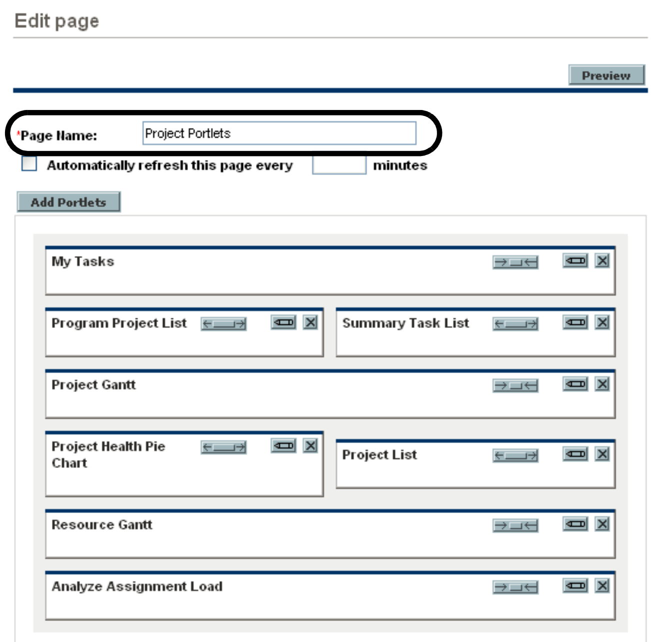
Renaming PPM Dashboard Pages

To rename a PPM Dashboard page:

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

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

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



The changes to your PPM Dashboard are automatically saved.

Setting Refresh Rates for PPM Dashboard Pages

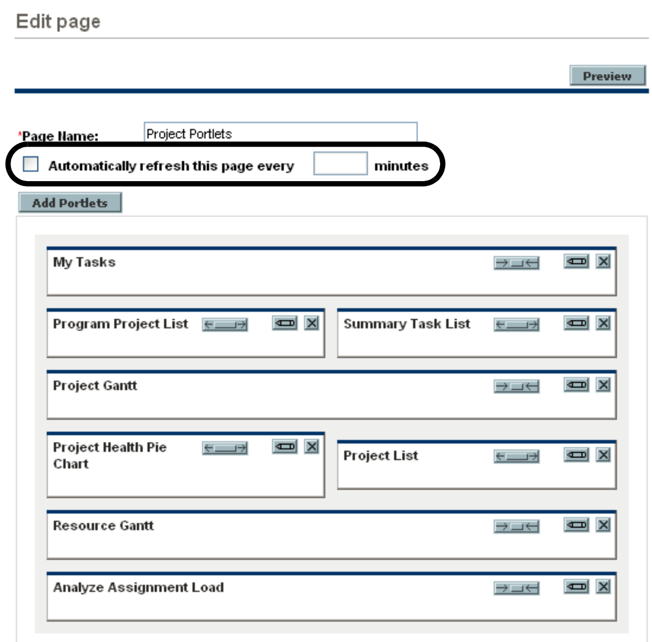
To set the refresh rate for a PPM Dashboard page:

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

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

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

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



The changes to your PPM Dashboard are automatically saved.

Adding Portlets to PPM Dashboard Pages

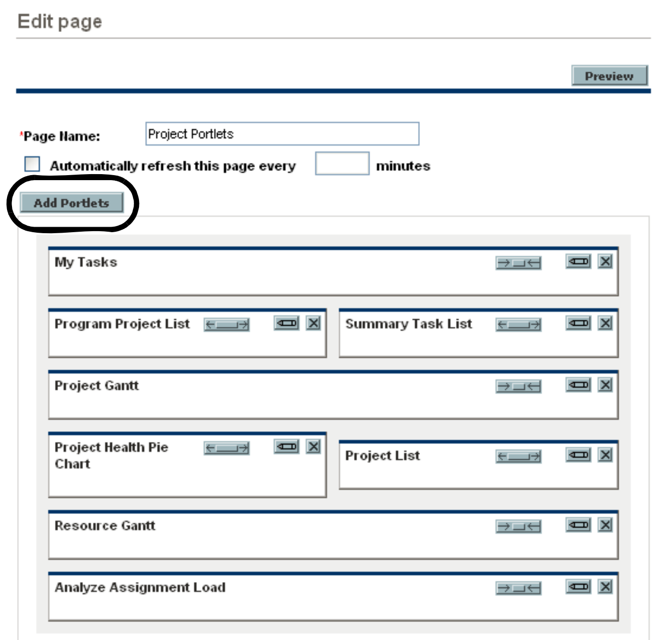
Portlets can be added to PPM Dashboard pages in two ways:

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

To add portlets:

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

        The selected PPM Dashboard page is displayed in the Edit page.
     iii. On the Edit page, click **Add Portlets.**



The Add Portlets to Dashboard Page opens.

- To add portlets directly from a PPM Dashboard page:

  i. From the menu bar, select **Dashboard > *<Dashboard_Page>*.**

  ii. Click the **Add Portlets** icon (located in the upper-right corner of the PPM Dashboard page).

  The Add Portlets to Dashboard Page opens.

3. Search for the portlets to add.

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

   - To list specific portlets:

     i. In **Category,** select the portlet's category from the list.

     ii. In **Portlet Name,** enter all or part of the portlet's name.

     iii. Click **Find Portlets.**

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

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

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

Moving Portlets on PPM Dashboard Pages

You can move portlets on a PPM Dashboard page by using drag and drop or copy and paste operations.

To move portlets:

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

   The selected PPM Dashboard page is displayed in the Personalize Dashboard page.
4. Select the portlet you want to move.

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

   The changes to your PPM Dashboard are automatically saved.

Previewing PPM Dashboard Pages

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

Working with Groups

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

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

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

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

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

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

7. Add new pages to the group as described in *Adding PPM Dashboard Pages* on page 58.

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

Personalizing Portlets

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

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

Deleting Portlets

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

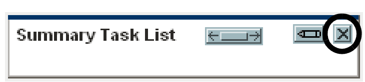
- Using the Personalize Dashboard page
- Using the **Delete** menu bar selection from a specific PPM Dashboard page

To delete portlets using the Personalize Dashboard page:

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

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

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

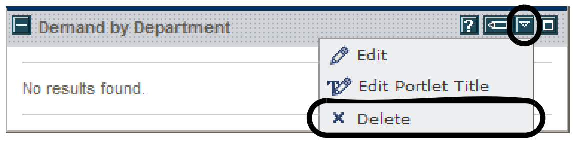


   The portlet is deleted.

   The changes to your PPM Dashboard are automatically saved.

To delete a portlet directly from a PPM Dashboard page:

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



The portlet is deleted.

The changes to your PPM Dashboard are automatically saved.

Changing the Size of Portlets

Portlets come in two sizes:

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

To change the width of portlets:

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

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

4. Change the size of the portlet.

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

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

The changes to your PPM Dashboard are automatically saved.

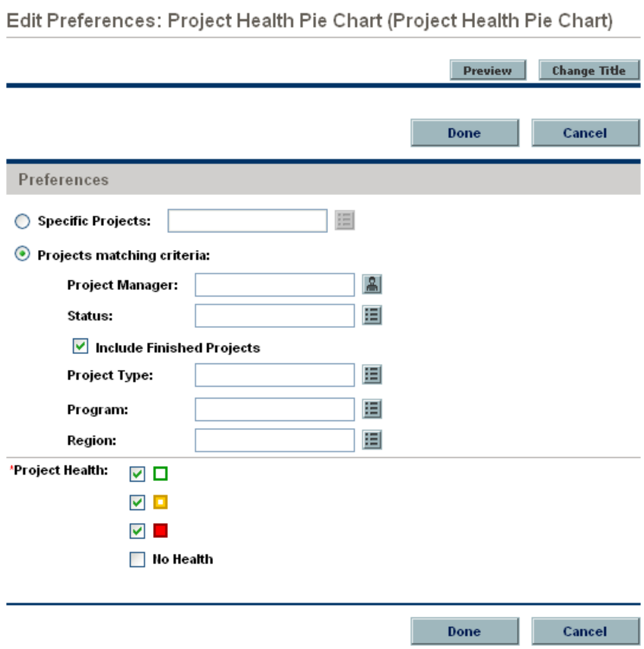
Configuring Portlets

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

To configure a portlet:

1. Log on to PPM Center.
2. On the portlet, click the **Edit** icon.

   The portlet's edit page displays.



3. Personalize your portlet.

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

- **Title.** You can change the name of the portlet. Click **Change Title** to open the Change Title page. You can also select the **Edit Portlet Title** menu item directly from a PPM Dashboard page.
- **Preferences.** You can configure the filters that are used to capture and display the data you want. Select the filters that best fit your business requirements.
- **Choose display columns.** You can configure how to display the data in the portlet. The **Available Columns** field lists all of the columns available to be displayed. The **Displayed Columns** field lists all columns the are already selected for display in the portlet's normal view. The **Additional Columns Displayed in Maximize View** field lists the additional columns that are displayed in the portlet's maximized view. To move entries between fields, select an entry and click one of the enabled **Move Arrow** icons.
- **Display options.** You can configure how to display the data. Select the options that best suit your business requirements.
- **Arrange data.** You can configure how to display the data. Select the options that best suit your business requirements.

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

   The changes to the portlet are saved.

Using the Query Builder for Portlets

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

For example, you could search for all Enhancement requests with a **Description** that contains the words "Release Notes" and with an assigned **Priority** of **Critical.**

For more details on using the Query Builder, see *Defining Customized Searches* on page 26.

3 Using the PPM Workbench

Opening and Closing the PPM Workbench

You can access the PPM Workbench from PPM Center by using the menu bar or from your desktop after you create a desktop shortcut.

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

Opening PPM Workbench from PPM Center

To open the PPM Workbench from PPM Center:

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

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

   The PPM Workbench opens.

Opening PPM Workbench from the Desktop (Initial Installation)

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

1. Create desktop and Start menu shortcuts:
   a. Log on to PPM Center.

b. From the menu bar, select **Open > Administration > Open Workbench on Desktop.**

c. Click **Yes** when prompted to create shortcuts to the PPM Workbench. If you have already created the shortcuts, continue to step 2.

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

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

   The PPM Workbench opens.

Opening PPM Workbench from the Desktop

To open the PPM Workbench from your desktop:

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

   The PPM Workbench opens.

Closing PPM Workbench

To close the PPM Workbench:

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

   The PPM Workbench closes.

Searching for Entities

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

Saved Queries

You can save and rerun queries that you run frequently by using the saved query functionality. When saving a query, the saved query is only available to the configuration entity Workbench window where you created the saved query. For example, a saved query in the Request Type Workbench window is not available in the User Data Workbench window.

Creating Saved Queries

To create a saved query:

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

   The configuration entity Workbench window opens to the **Query** tab.
3. On the **Query** tab, enter the search criteria and click **Save Query.**

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

   The query is saved.

Using Saved Queries

To use a saved query:

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

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

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

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

Deleting Saved Queries

To delete a saved query:

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

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

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

   The selected saved query is highlighted.

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

   A Question Dialog opens.

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

   The saved query is deleted.

Case Sensitivity and Using Wildcards

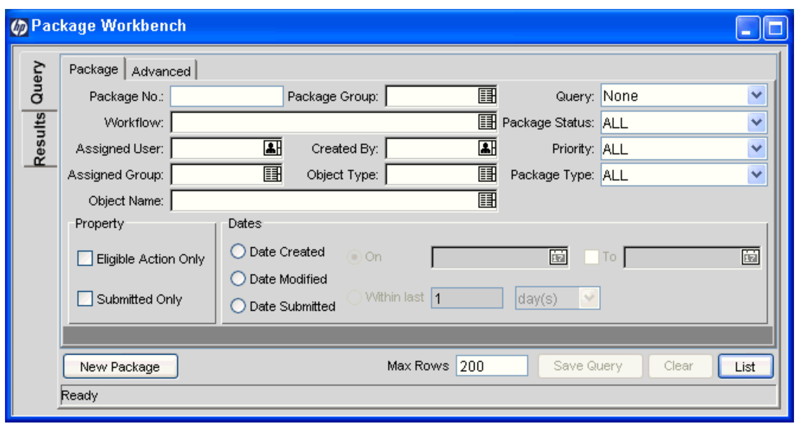
Filter fields are case insensitive. For example, entering the word **test** in a filter field would return **test, TEST,** and **Test.** Filter fields also return partial matches. For example, entering the word **test** in a filter field could return **Test Project** and **Testing Project.**

Filter fields also accept the wildcard character **%,** which it will use to match against any character. For example, entering **%ample** in a filter field would include **Example** and **Sample.** By contrast, if you do not use the wildcard character and instead enter the search string **ample** in a filter field, the words **Example** and **Sample** are excluded from the search results.

Advanced Queries

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

Figure 3-1. Package Workbench window



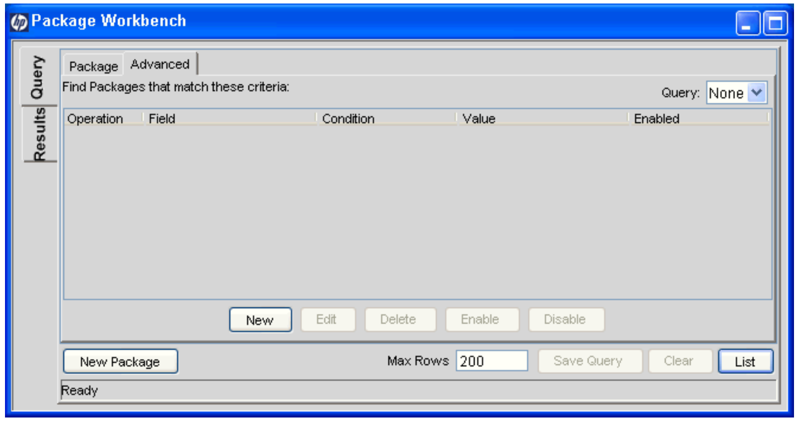
To enter advanced query criteria:

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

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

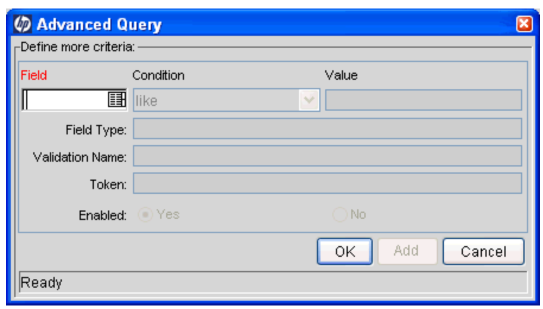
3. On the **Package** tab, complete the search criteria and click the **Advanced** tab.

   The **Advanced** tab opens.



4. In the **Advanced** tab, click **New.**

   The Advanced Query window opens.

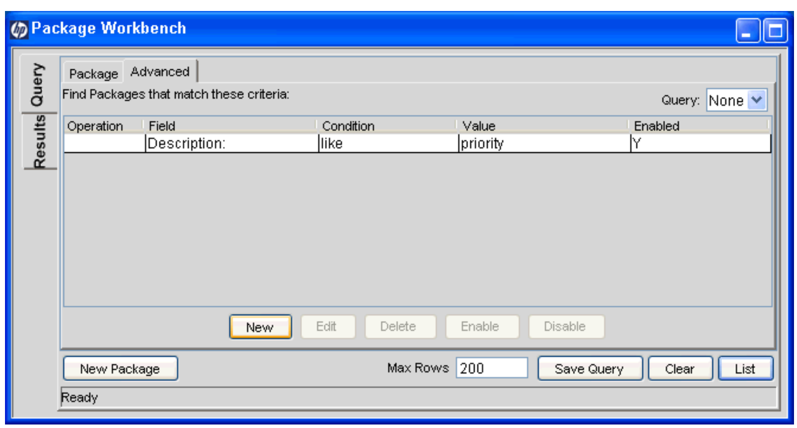


5. In the Advanced Query window, complete the filter fields and click **Add.**

   See *Table 3-2* for the list of conditions. The advanced query logic is added to the query.

Figure 3-2. Boolean operators

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



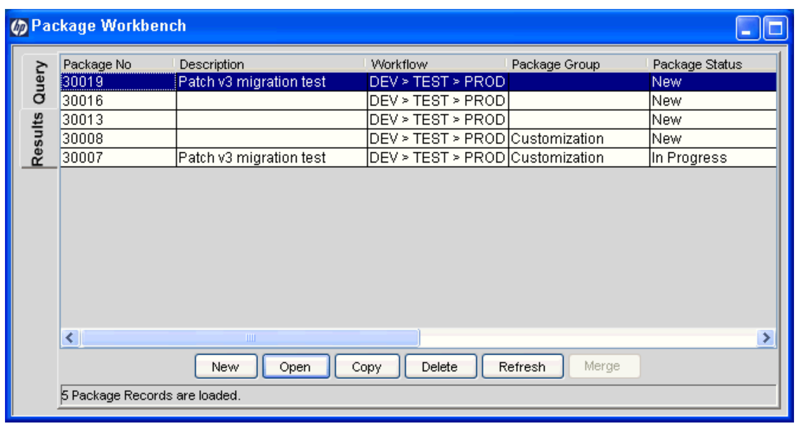
6. In the **Advanced** tab, click **List.**

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

Selecting Configuration Entities

The **Results** tab displays all of the configuration entities matching the search criteria. You can sort the results by any of the available fields by clicking the column header. On the **Results** tab, select any of the returned configuration entities (or a range of configuration entities) for viewing, copying, or modifying (see *Figure 3-3*).

Figure 3-3. Results tab



To select a contiguous group of configuration entities:

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

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

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

   The entity is highlighted.

5. Hold down the **`Shift`** key and select another entity.

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

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

   All of the highlighted entities are opened or deleted.

To select several separated entities:

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

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

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

   The entity is highlighted.

5. Hold down the **`Ctrl`** key and select another entity.

   Both of the selected entities are highlighted.

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

   Both of the highlighted entities are opened or deleted.

The **Results** tab also provides buttons for performing other common tasks. You can create **New** entities, **Open, Copy,** or **Delete** existing entities, or rerun a query by clicking **Refresh.**

Opening, Deleting, and Copying Entities

To open, delete, or copy an entity:

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

   The results are displayed on the **Results** tab.
4. On the **Results** tab, select an entity.

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

Creating New Entities

To create a new entity:

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

   The entity's detail window opens.
4. In the detail window, complete the fields as required and click **OK.**

   The entity is created.

Navigating PPM Workbench Windows

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

Every PPM Workbench window has a Query tab, which is used to search PPM Center for entities associated with the PPM Workbench window. The results of a Query tab search are listed in the PPM Workbench window's Results tab.

When multiple detail windows are open, you can access an individual detail window by using the buttons at the bottom of the PPM Workbench. If you minimize a detail window, or even a PPM Workbench window, you can view the window by clicking the appropriate button at the bottom of the PPM Workbench.

4 What's Next

After This Document

This document provides an overview of the PPM Center Web pages and the PPM Workbench.

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

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

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

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

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