

HP Project and Portfolio Management Center

Software Version: 9.20

Getting Started

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Software Release Date: February 2013



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

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

To check for recent updates, or to verify that you are using the most recent edition of a document, go to:

h20230.www2.hp.com/selfsolve/manuals

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You can visit the HP Software Support Web site at:

hp.com/go/hpsoftwaresupport

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

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

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

To find more information about access levels, go to:

h20230.www2.hp.com/new_access_levels.jsp

To register for an HP Passport ID, go to:

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

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1 Introduction

Overview of HP Project and Portfolio Management Center

Welcome to HP Project and Portfolio Management Center!

This guide provides 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.

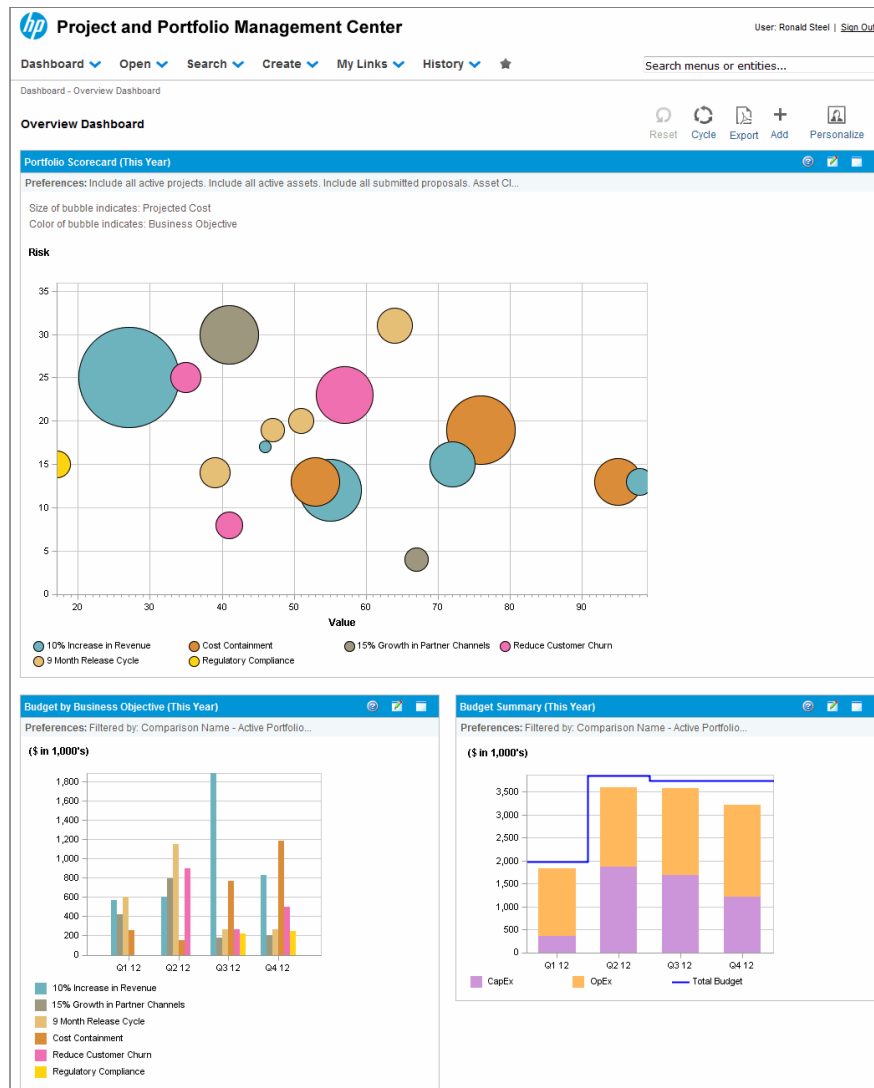


Your view of PPM Center is determined by your level of access to features and data, which is set by your system administrator. The set of pages, portlets, and fields that you see may be different from another user's, depending on the level of access provided to you.

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.



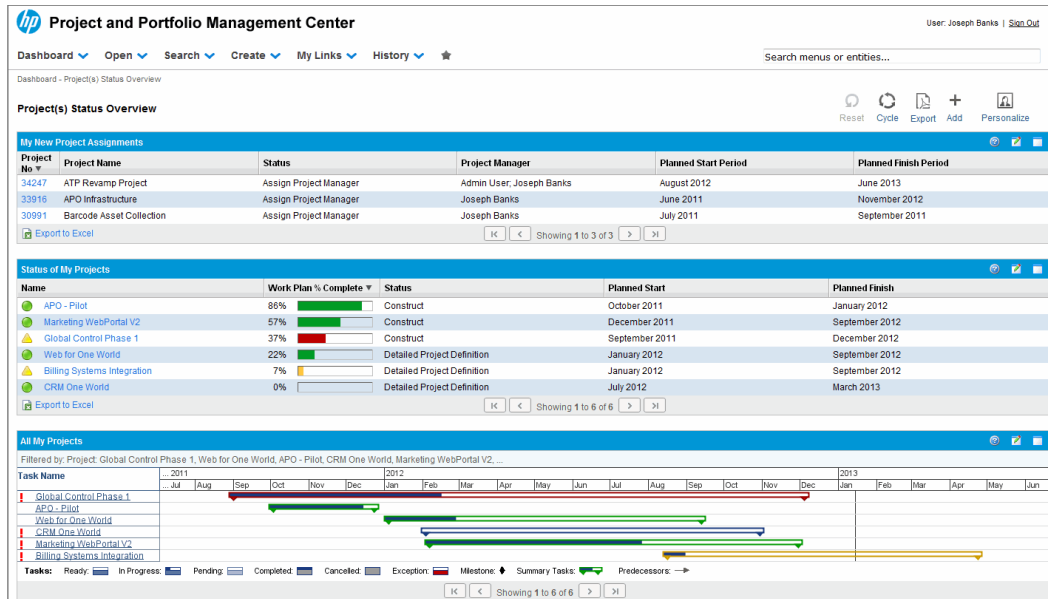
If you have a pop-up blocker or download blocker active on your Web browser, you may have difficulties using the Web pages.

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.

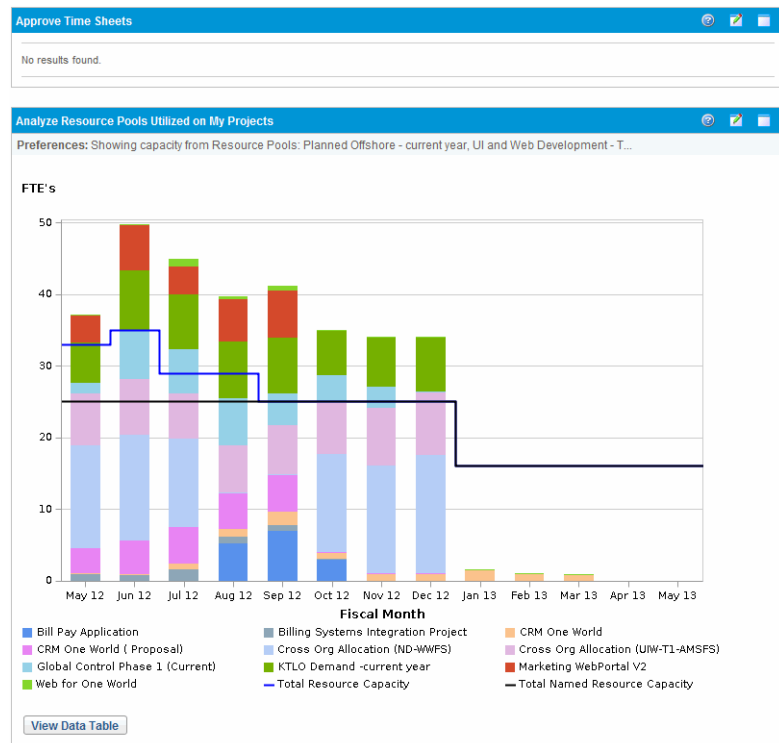
- **Blank pages.** Blank pages are PPM Dashboard pages without portlets. Once you add a blank PPM Dashboard page to your PPM Dashboard, you can configure the PPM Dashboard page to your specifications.

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

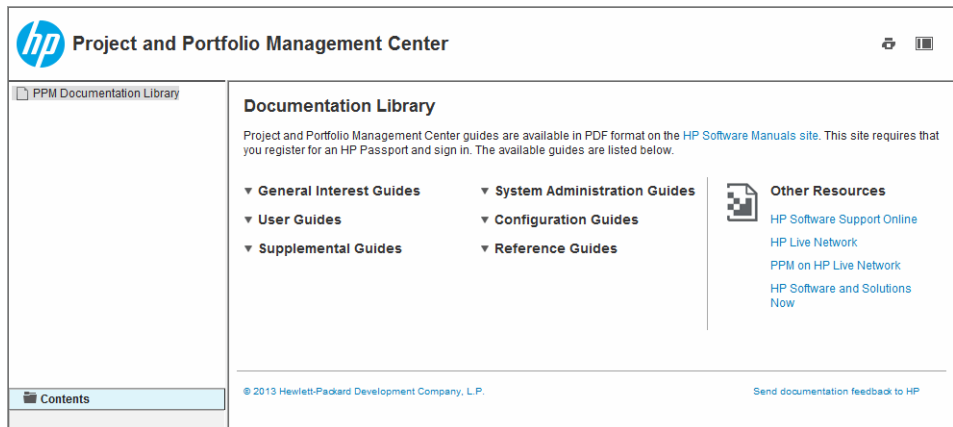


Figure 1-4 shows the Documentation Library page available when PPM Center is first installed. You can expand a topic area for a list of guides containing pertinent information for the selected topic. Clicking a link for a guide opens the guide in PDF format from the HP Software Manuals site.

The Other Resources section contains links to other resources that might be of your interest.

If your system administrator upgrades your PPM Center from an earlier version, and has customized the old Documentation Library page to display only the documents relevant for your organization, your administrator can enable the customizable Documentation Library page by modifying the menu item path in the `<PPM_Home>/conf/menus/menu.xml` file. For more information, see *Customizing the Standard Interface*.



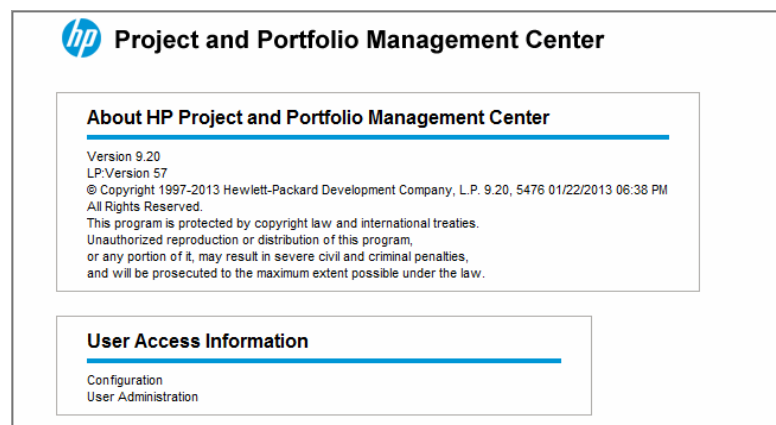
You can also view the available documentation from the PPM Workbench. Select **Open > Product Information > Library** from the PPM Workbench.

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



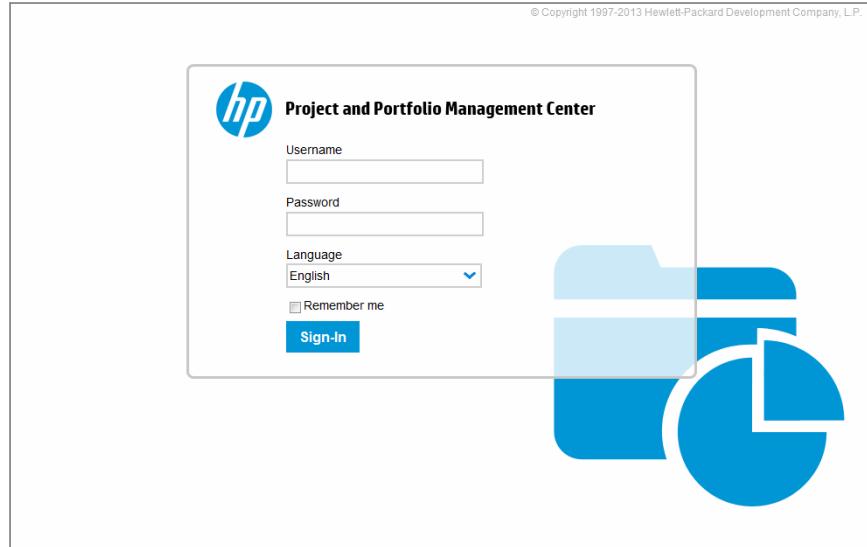
For information about customizing the display of the PPM Center Web pages, see the *Customizing the Standard Interface* guide.

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.



The screenshot shows the HP Project and Portfolio Management Center login page. At the top right, it says "© Copyright 1997-2013 Hewlett-Packard Development Company, L.P.". The main content area has the HP logo and the title "Project and Portfolio Management Center". Below this are four input fields: "Username", "Password", "Language" (a dropdown menu currently showing "English"), and a "Remember me" checkbox. A blue "Sign-In" button is located below the "Remember me" checkbox. To the right of the login form is a large blue graphic consisting of a folder icon and a pie chart icon.

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

If you want the server to retain a password, select the **Remember me** 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 **Sign-In**.

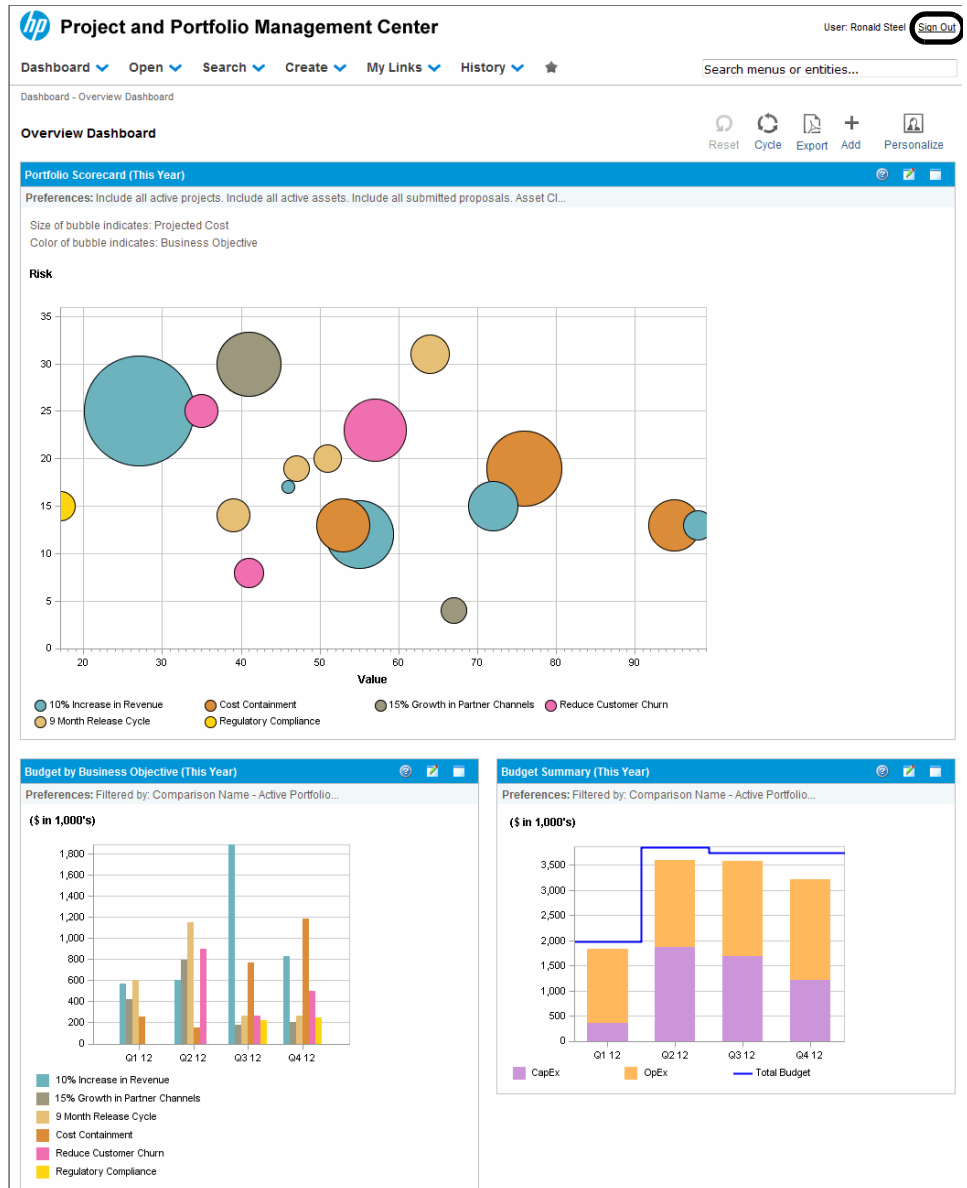
The Web pages open. First-time users might be prompted for a new password.



Logging Off PPM Center

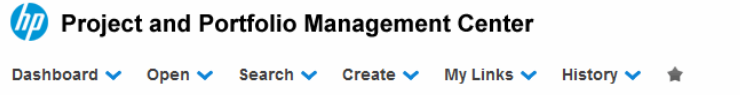
To log off PPM Center, in the upper-right corner of the page, click **Sign Out** (see [Figure 2-1](#)).

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 67.

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.

Create New Request

*Request Type:

Create

Create Based On Desired Action
Most Recently Created
Request a New Initiative
Generic Request
Report an Application Bug
Request an Application Enhancement
Submit Project Risk

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

Create New PFM - Asset

Submit

Cancel

Save Draft

Expand All | Collapse All

Summary

Created By:

Joseph Banks

Driving Process:

PFM - Asset

Business Unit:

Status:

Not Submitted

Description:

Asset Dependencies:

Project Manager:

Region:

Benefits Manager:

Asset Details

Asset Name:

Project Class:

Annual Maintenance Cost:

Project:

Vendor Name:

Placed in Service Date:

Location:

Dependent Applications:

Asset Health:

Asset Class:

Business Objective:

Under Maintenance with Vendor:

Yes

No

Expected End of Life Date:

Supervisor:

Business Case Details

Staffing Profile:

No Staffing Profile

Create

Nominal Return:

0

Score Adjustment:

Discount Rate:

10

Financial Summary:

(No Financial Summary)

Associated Programs:

(No Associated Programs)

Portfolio:

(No Associated Portfolio)

Value Rating:

0

Total Score:

0

Risk Rating:

0

Value Ratings

Internal Rate of Return:

Strategic Match:

Competitive Advantage:

Competitive Response:

Productivity:

Risk Ratings

Organization Risk:

Technical Risk:

Architecture Risk:

Definition Risk:

Infrastructure Risk:

Notes

References

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.

hp Project and Portfolio Management Center User: Joseph Banks | [Sign Out](#)

Dashboard ▾ Open ▾ Search ▾ Create ▾ My Links ▾ History ▾ ☆ Search menus or entities...

Dashboard - Project(s) Status Overview > Search Requests

Search Requests

View Details for Request #: [Go](#) [Search](#) [Cancel](#)

Search for Requests to View [Clear Fields](#)

Request Type: [Advanced Search](#)

Status: [...](#)

Assigned To: [...](#)

Created By: [...](#)

Department: [...](#)

Workflow: [...](#)

Contact: [...](#)

Linked Project: [...](#)

Priority: [...](#)

Assigned To Group: [...](#)

Request Sub Type: [...](#)

Application: [...](#)

Request Group: [...](#)

Company Name: [...](#)

Active at Workflow Step: [...](#)

Creation Date From: [To:](#) [...](#)

Last Update Date From: [To:](#) [...](#)

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

Document Key Words: Search content and details of attached documents. [...](#) [Search Historical Versions](#)

Document File Name Contains:

Preventing Action On: ☐ Requests ☐ Packages

Eligible for My Action? ☐ Yes ☒ No

Include Closed? ☐ Yes ☒ No

Additional Filters: [Query Builder](#)

Sort By: [Req #](#) ☐ Ascending ☒ Descending

***Maximum Results Per Page:** 50 ***Limit Rows Returned To:** 1000

Choose Columns

Available Columns

- % Complete
- Assigned To Group
- Company Name
- Contact
- Creation Date
- Department
- Last Updated
- Request Group
- Request Sub Type

Selected Columns

- Req # *
- Request Type
- Description
- Status
- Assigned To
- Priority
- Created By
- Application

Note: Columns followed by an asterisk (*) cannot be removed from the display.

Save this search as: [Save](#) [Manage Saved Searches](#)

[Search](#) [Cancel](#)

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.

A screenshot of a window titled "Request Type" with a close button in the top right corner. The window has a search bar at the top labeled "Request Type starts with:" with a text input field and a "Find" button. Below the search bar is a section labeled "Show All Request Types" with radio buttons for "Yes" (selected) and "No", and a "Find" button. The main area is divided into two panes: "Available: Click a value to select" and "Selected:". The "Available" pane contains a list of request types: "(Demand Demo) Application Enhancement", "AB_PFM_PROPOSAL", "ALM - Defect Template with Quality Center Integration (OOTB)", "ALM - RFC Demo", "ALM - Release Management (OOTB)", "ALM - Request for Change (RFC) (OOTB)", "ALM Defect Integration", and "APM - Application". The "Selected:" pane is currently empty. At the bottom, there is a "Page:" section with navigation buttons, a "Showing 1-50 of 52" indicator, a "Change Order" link, and "OK" and "Cancel" buttons.

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

4. Click **Query Builder**.

The Query Builder Search Terms window opens.

A screenshot of the "Query Builder Search Terms" window. The window has a title bar with the HP logo and "Project and Portfolio Management Center". Below the title bar is a search bar labeled "Search Terms" with a text input field. Below the search bar is a message: "There are currently no Search Terms to display". Below the message is a row of buttons: "Check All", "Clear All", "Add", "Edit", "Remove", "Group", and "Ungroup". At the bottom right are "Done" and "Cancel" buttons.

5. Click **Add**.

The Query Builder Search Terms - New Entry window opens.

A screenshot of the "Query Builder Search Terms - New Entry" window. The window has a title bar with the HP logo and "Project and Portfolio Management Center". Below the title bar is a section header "Query Builder Search Terms - New Entry". Below the header is a form with two fields: "*Field:" with a text input field and a list icon button, and "Comparison Operator:" with a dropdown menu showing "=" and a downward arrow. At the bottom right are "Done" and "Cancel" buttons.

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.

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

For instruction on how to run a search, see [Running New Searches on page 24](#).

Export to Excel Modify Search

Save this search as: Save Manage Saved Searches

Request Search Results Showing 91 - 100 of 159

Req #	Request Type	Description	Status	Assigned To	Priority	Created By
<input type="checkbox"/> 31202	Project Details		In Planning			Admin User
<input type="checkbox"/> 31203	DEM - Application Enhancement	Need CSM patch #55462	On Hold		Normal	Admin User
<input type="checkbox"/> 31204	DEM - Application Enhancement	Need report showing trends on a weekly basis - currently monthly basis	New	Joseph Banks	High	Admin User
<input type="checkbox"/> 31205	DEM - Application Enhancement	URGENT: Need Version Control S/W Upgrade v5.5.5	New		Critical	Admin User
<input type="checkbox"/> 31209	Program Issue	Oversee IT revamp	New	Leslie Franklin	Low	Admin User
<input type="checkbox"/> 31210	Project Issue	Usability testing	New	Bridget Holbrook	Normal	Admin User
<input type="checkbox"/> 31211	Project Issue	Losing our Oracle Apps expert QA person	New	Joseph Banks	Critical	Joseph Banks
<input type="checkbox"/> 31212	Project Issue	We need another cube for contractors expected next month	New		Normal	Joseph Banks
<input type="checkbox"/> 31213	Project Risk	risk	New	Finn Gill		Admin User
<input type="checkbox"/> 31214	Project Risk	testing	New		Critical	Admin User

Check All Clear All Edit Delete Showing 91 - 100 of 159

Export to Excel Modify Search

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.

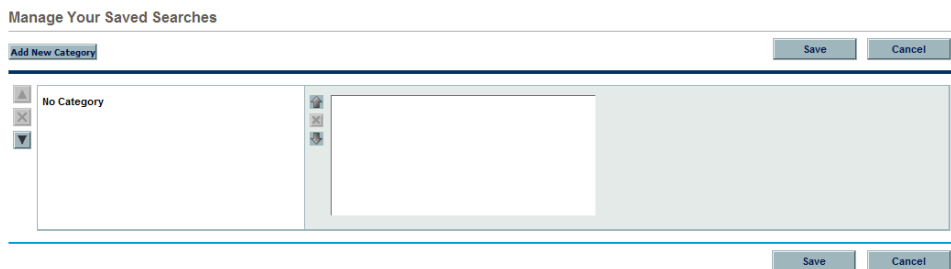
Managing Saved Searches

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.

Manage Your Saved Searches

Add New Category Save Cancel

No Category

Save Cancel

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 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

Browse PFM - Proposal Requests

[Modify Preference Set](#)[Reload](#)

Expected Finish Period > Expected Start Period > Business Unit				Total
Total				29
+ January 2013				1
+ December 2012				5
+ October 2012				1
+ September 2012				2
+ August 2013				1
+ February 2013				6
+ August 2012				9
+ November 2012				4

(Filters: Expected Finish Period=December 2012)

	Proposal No	Request Type	Description	Status	Assigned To	Priority	Created By
<input type="checkbox"/>	30843	PFM - Proposal		1st Level Review			Admin User
<input type="checkbox"/>	31283	PFM - Proposal		Detailed Business Case			Admin User
<input type="checkbox"/>	31301	PFM - Proposal		Finance Review			Admin User
<input type="checkbox"/>	31302	PFM - Proposal		New			Admin User
<input type="checkbox"/>	31328	PFM - Proposal		New			Admin User

[Check All](#) [Clear All](#) [Edit](#)

[Export to Excel](#)

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

Figure 2-3. Request Browser search

Delete Preference Set
Browse
Cancel

Request Browser List Configuration

Clear Fields

Request Type: PFM - Project
Advanced Search

Status:
Assigned To:
Created By:
Department:
Workflow:
Contact:
Linked Project:
Creation Date From:
Last Update Date From:
Request Key Words: Search the content of Request Notes and Descriptions.

Priority:
Assigned To Group:
Request Sub Type:
Application:
Request Group:
Company Name:
Active at Workflow Step:

Preventing Action On:
Eligible for My Action?
Include Closed?

Sort By:
Ascending
Descending

Maximum Results Per Page:
Limit Rows Returned To:
Maximum rows at each Tree Level:

Choose Columns for Request List

Available Columns
Selected Columns

Note: Columns followed by an asterisk (*) cannot be removed from the display.

Request Browser Tree Configuration

Choose Additional Column to Display in Request Browser Tree

Additional Column:

Choose Fields to Group by in Request Browser Tree

Available Fields
Selected Fields

Note: At least 1 field needs to be selected. (Maximum 5 fields can be selected).

Save this Preference Set as:
Save

Browse
Cancel

Specify search criteria 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 Report**.

The Submit New Report page opens.

3. Select a report.

There are two ways in which to select a report:

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

Submit New Report

Recently Submitted Reports

Purge Empty Time Sheet Lines	Purge Time Sheet Lines from the database that have no time logged against them
Request Detail Report	Audit the details of one or more requests. Includes header and detail information, notes, and status for each selected request.
Contact Detail Report	View the details of one or more contacts.
Notification History Report	View Notifications that have been sent or are pending
Demand Creation History Report	Demand Creation history by period and by various demand fields. Useful for exporting request data to MS Excel or other data analysis tools.

Select Report by Category

Report Category: Project Management

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

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

The Report Submitted page opens prior to the report.

Opening Existing Reports

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

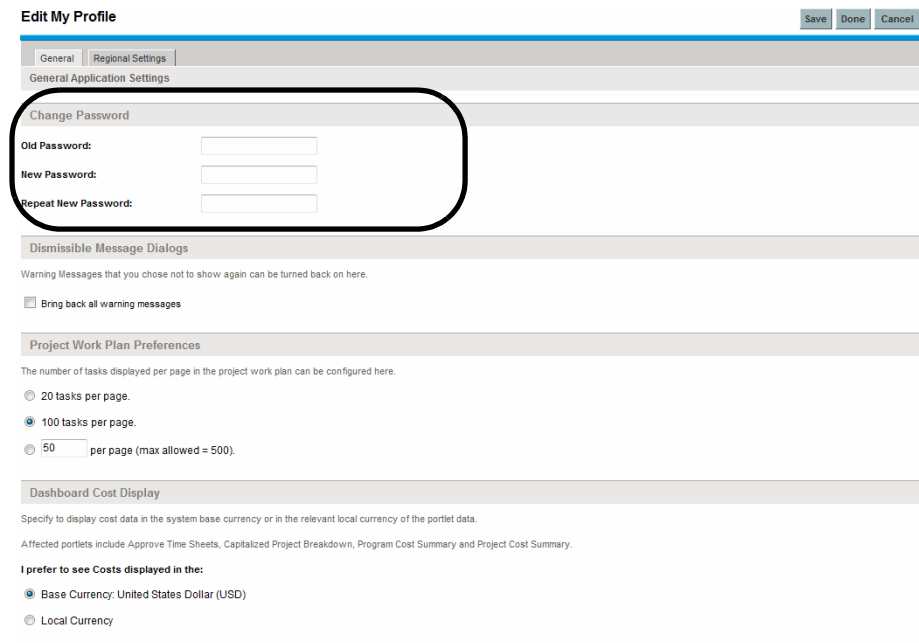
By using the **Open > Administration** menu, you can adjust several interface settings to fit your own preferences. You can also change your password.

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.



The screenshot shows the 'Edit My Profile' web form. At the top right are 'Save', 'Done', and 'Cancel' buttons. Below the title bar are tabs for 'General' and 'Regional Settings'. The 'General Application Settings' section is expanded, showing the 'Change Password' subsection. This subsection contains three input fields: 'Old Password:', 'New Password:', and 'Repeat New Password:'. These fields are enclosed in a black rounded rectangle. Below this are sections for 'Dismissible Message Dialogs' (with a checkbox for 'Bring back all warning messages'), 'Project Work Plan Preferences' (with radio buttons for '20 tasks per page', '100 tasks per page' (selected), and '50 per page (max allowed = 500)'), and 'Dashboard Cost Display' (with radio buttons for 'Base Currency: United States Dollar (USD)' (selected) and 'Local Currency').

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.

Edit My Profile Save Done Cancel

General Regional Settings
General Application Settings

Change Password

Old Password:

New Password:

Repeat New Password:

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

☐ Bring back all warning messages

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

☐ 20 tasks per page.

☒ 100 tasks per page.

☐ 50 per page (max allowed = 500).

Dashboard Cost Display
Specify to display cost data in the system base currency or in the relevant local currency of the portlet data.
Affected portlets include Approve Time Sheets, Capitalized Project Breakdown, Program Cost Summary and Project Cost Summary.

I prefer to see Costs displayed in the:

☒ Base Currency: United States Dollar (USD)

☐ Local Currency

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 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 39](#).

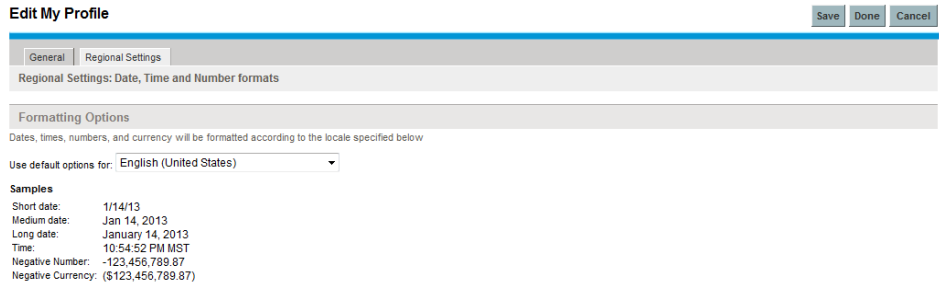


(Windows only) To export data to Microsoft Excel or synchronize data with Microsoft Project, your PPM Center regional settings preference must match that of the Windows environment on which you are performing the data export or synchronization. This match ensures that Microsoft Excel or Microsoft Project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

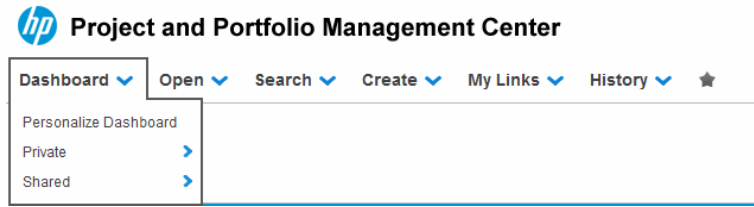
The PPM Dashboard collects data from PPM Center and displays the data in real time. System data is organized using PPM Dashboard pages and portlets. Every PPM Dashboard has at least one PPM Dashboard page.

Opening PPM Dashboard Pages

Every PPM Dashboard can have one or more PPM Dashboard pages. To open a PPM Dashboard page:

1. Log on to PPM Center
2. From the menu bar, select **Dashboard**
3. Select the desired page from the list.

Figure 2-4. PPM Dashboard Page



Setting Portlet Views

Portlets can be set to one of the following views:

- **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 2-5](#)).

Figure 2-5. Normal and minimized views of portlets20

Request List						
Req #	Request Type	Description	Status	Assigned To	Priority	Created By
30871	DEM - Application Bug	Page Navigation error	On Hold	Offshore Developer A4	High	Karen O'Keefe
30539	DEM - Application Bug	Portal Link Error	On Hold	Offshore Developer A7	Normal	Admin User
30538	DEM - Application Bug	Remedy Installation	On Hold	Andy Madison	Normal	Admin User
30537	DEM - Application Bug	Advanced search does not work	On Hold	Offshore Developer A4	Low	Admin User
30536	DEM - Application Bug	Date on the line items become null on refreshing the screen	New	Offshore Developer A4	Critical	Admin User

Export to Excel Showing 1 to 5 of 7

- **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 2-6](#)). To return a maximized view portlet to the normal view, in the portlet's maximized view, click the **Restore** icon (see [Figure 2-7](#)).

Figure 2-6. Portlet maximize icons

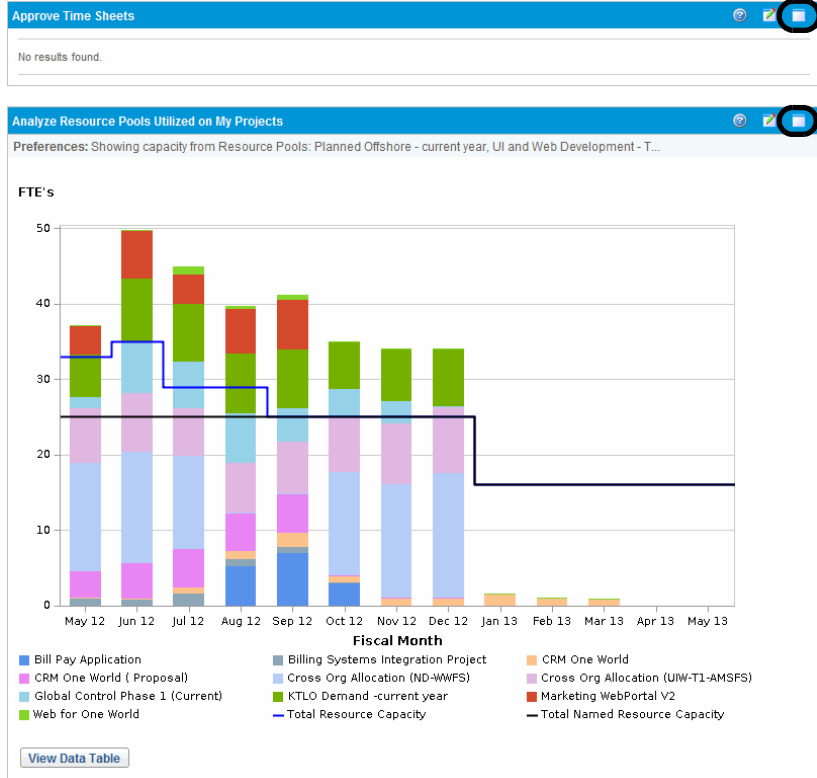


Figure 2-7. Portlet maximized view



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 2-8](#)).

- 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 2-8. Sort icon

Approve Time Sheets

Preferences: Previous Time Periods to Show: 1, Time Sheet Line Status: 2;

	Resource	Time Period - Time Sheet # ▼	Status	Manager	Time to Approve	Total Time	Approvable Line Costs
<input type="checkbox"/>	Joseph Banks	2/16/13 - 2/28/13 - 1	Submitted	Dennis Morrison	18 (Hours)	18 (Hours)	\$0.00
<input type="checkbox"/>	Joseph Banks	2/1/13 - 2/15/13 - 1	Submitted	Dennis Morrison	30 (Hours)	30 (Hours)	\$0.00
<input type="checkbox"/>	Joseph Banks	1/16/13 - 1/31/13 - 1	Submitted	Dennis Morrison	167 (Hours)	167 (Hours)	\$0.00
<input type="checkbox"/>	Andy Madison	1/1/13 - 1/15/13 - 1	Submitted	Admin User	28 (Hours)	28 (Hours)	\$0.00
<input type="checkbox"/>	Andy Madison	1/1/13 - 1/15/13 - 1	Submitted	Admin User	28 (Hours)	28 (Hours)	\$0.00

☐ Check all

⏮

⏪

Showing 1 to 5 of 7

⏩

⏭

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 2-9. Drilling down from a list portlet

The screenshot shows a web application for approving time sheets. At the top, there's a header 'Approve Time Sheets' and a sub-header 'Preferences: Previous Time Periods to Show: 1; Time Sheet Line Status: 2;'. Below this is a table with columns: Resource, Time Period - Time Sheet #, Status, Manager, Time to Approve, Total Time, and Approvable Line Costs. The table lists four entries for Joseph Banks and Andy Madison. A black arrow points from the 'Submitted' status of the first Joseph Banks entry to the detailed view below.

Joseph Banks - Time Sheet for 2/16/13 - 2/28/13 (Pending Approval)

Resource: Joseph Banks Time Period: 2/16/13 to 2/28/13 Time Sheet #: 1
Description: Joseph Banks - 2/16/13 - 2/28/13 Status: Pending Approval
Approvals/Transaction Details Time Sheet Policies

Time Sheet Details (All times shown in hours)

Time Breakdown Other Actuals Additional Information Group | Ungroup Items

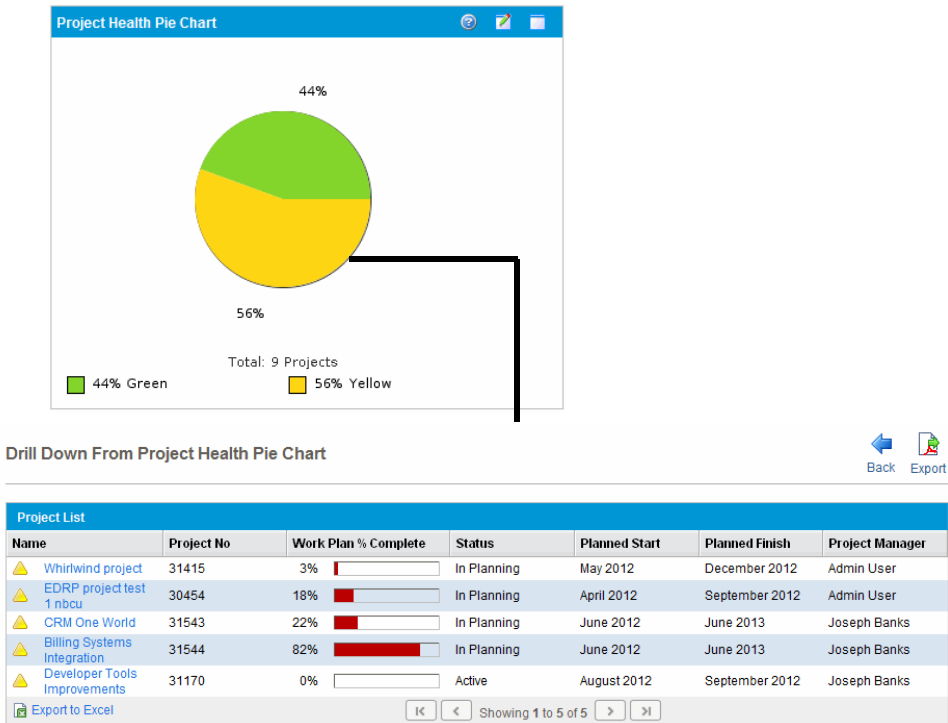
Item	Status	Activity	Expected Hours	Sat 2/16	Sun 2/17	Mon 2/18	Tue 2/19	Wed 2/20	Thu 2/21	Total
Analyst Research Project: 30917										
Task: Development Complete (Analyst Research)	Submitted		8.0	2.00	2.00	2.00	2.00	2.00	0.00	10.00
Task: Internal QA Complete (Analyst Research)	Submitted		8.0	2.00	3.00	2.00	1.00	0.00	0.00	8.00
Line Actions:				4.00	5.00	4.00	3.00	2.00	0.00	18.00

Line Details Approve Reject

Notes Add Notes

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

Figure 2-10. Drilling down from a chart portlet



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 2-11. 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

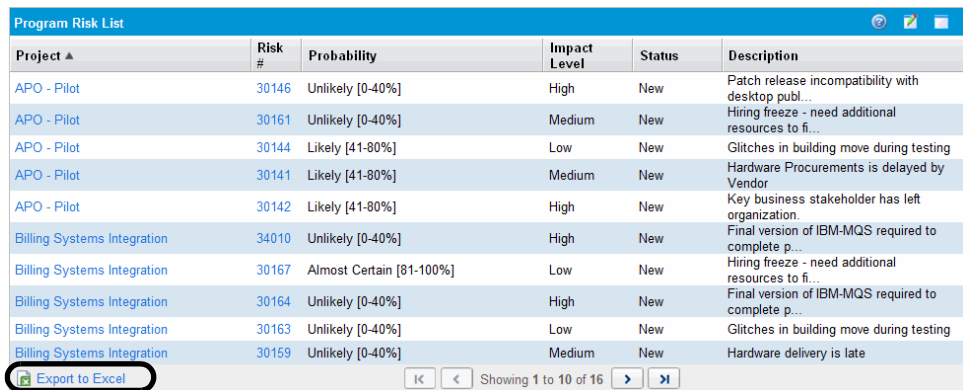
You can remove a PPM Dashboard page or URL from your My Links list. To remove PPM Dashboard pages, click **My Links > Manage My Links**, and then select which page to remove. Click **Remove** to remove the selected page. And finally click **Save**.

Exporting Data to Excel Spreadsheets

Data on a list portlet 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 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 2-12. Exporting Data to Excel



The screenshot shows a web application window titled "Program Risk List". It contains a table with the following columns: Project, Risk #, Probability, Impact Level, Status, and Description. The table lists 10 risk items. At the bottom left of the table, there is a green icon with a document and the text "Export to Excel", which is circled with a black line. At the bottom right, there are navigation controls including "Showing 1 to 10 of 16" and arrows for navigating between pages.

Project ▲	Risk #	Probability	Impact Level	Status	Description
APO - Pilot	30146	Unlikely [0-40%]	High	New	Patch release incompatibility with desktop publ...
APO - Pilot	30161	Unlikely [0-40%]	Medium	New	Hiring freeze - need additional resources to fi...
APO - Pilot	30144	Likely [41-80%]	Low	New	Glitches in building move during testing
APO - Pilot	30141	Likely [41-80%]	Medium	New	Hardware Procurements is delayed by Vendor
APO - Pilot	30142	Likely [41-80%]	High	New	Key business stakeholder has left organization
Billing Systems Integration	34010	Unlikely [0-40%]	High	New	Final version of IBM-MQS required to complete p...
Billing Systems Integration	30167	Almost Certain [81-100%]	Low	New	Hiring freeze - need additional resources to fi...
Billing Systems Integration	30164	Unlikely [0-40%]	High	New	Final version of IBM-MQS required to complete p...
Billing Systems Integration	30163	Unlikely [0-40%]	Low	New	Glitches in building move during testing
Billing Systems Integration	30159	Unlikely [0-40%]	Medium	New	Hardware delivery is late



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

You can export the data on a portlet 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).

Configuring Microsoft Internet Explorer Internet Options

If you are using Microsoft Internet Explorer version 7, you must configure the Internet options of your browser to successfully export data to a Microsoft Excel file.

1. From your browser, select **Tools > Internet Options**.

The Internet Options window opens.

2. Select the **Security** tab.
3. Select the **Trusted sites** Web content zone.
4. Click **Sites**.

The Trusted sites window opens.

5. Type your PPM Server as a Web site to this zone.
6. Click **Add**.
7. Click **OK**.
8. In the Internet Options window, click **Custom Level**.

The Security Settings window opens.

9. Set the custom settings to **Medium-low** or lower.
10. Click **Reset**.

A dialog box opens requesting confirmation of the changes to security.

11. In the dialog box, click **Yes**.
12. In the Security Settings window, click **OK**.
13. In the Internet Options window, click **OK**.

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** 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** 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 **Comments** icon. A list of all comments written by the module's administrator is displayed.

Personalizing the PPM Dashboard

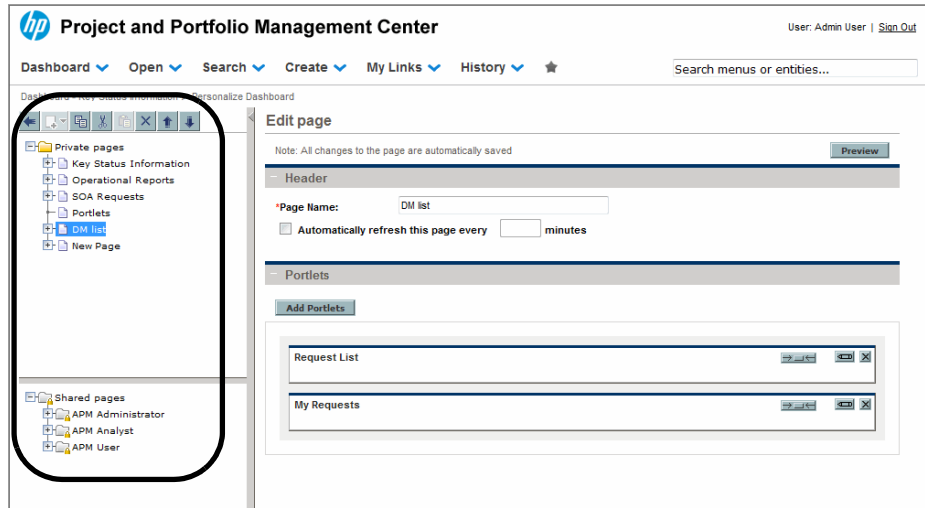
Personalizing the PPM Dashboard refers to making changes to your PPM Dashboard and PPM Dashboard pages. To personalize the PPM Dashboard, you can do the following:

- 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 2-13. 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:

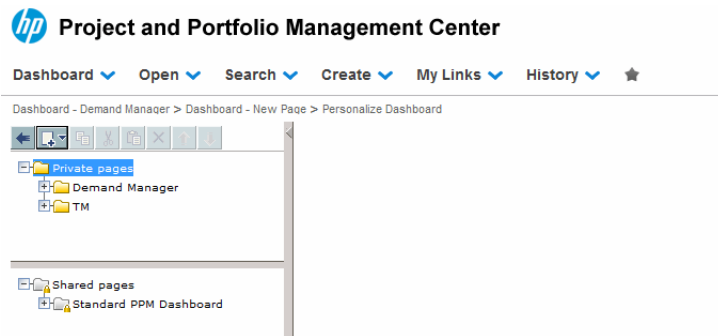
- Blank PPM Dashboard pages
- Preconfigured PPM Dashboard pages

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**.

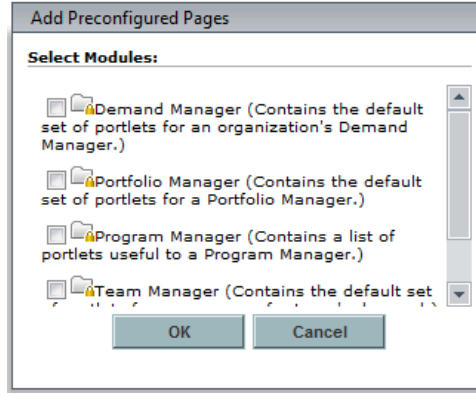


- ii. Click the **Add New** icon.
- iii. Select **New Page**.

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 **Up** or **Down** icon. 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.

Edit page

Note: All changes to the page are automatically saved Preview

Header

Page Name: Key Status Information

☐ Automatically refresh this page every minutes

Portlets

Add Portlets

Current High Visibility Projects [icon] [icon] [X]

RFcs [icon] [icon] [X]

GB - PFM Forecast Pivot [icon] [icon] [X]

Current Portfolio Map [icon] [icon] [X]

Portfolio by Strategic Mix [icon] [icon] [X]

Portfolio by Type of Project [icon] [icon] [X]

Analyze Assignment Load [icon] [icon] [X]

Analyze Resource Pools [icon] [icon] [X]

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.

Note: All changes to the page are automatically saved Preview

Header

*Page Name:

☒ Automatically refresh this page every minutes

Portlets

Add Portlets

Current High Visibility Projects	Refresh Stop Close
RFcs	Refresh Stop Close
GB - PFM Forecast Pivot	Refresh Stop Close
Current Portfolio Map	Refresh Stop Close
Portfolio by Strategic Mix	Refresh Stop Close
Portfolio by Type of Project	Refresh Stop Close
Analyze Assignment Load	Refresh Stop Close
Analyze Resource Pools	Refresh Stop Close

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.

Edit page

Note: All changes to the page are automatically saved Preview

Header

*Page Name:

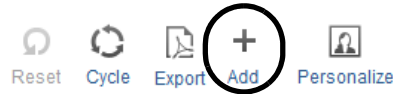
☐ Automatically refresh this page every minutes

Portlets

Add Portlets

- Current High Visibility Projects
- RFcs
- GB - PFM Forecast Pivot
- Current Portfolio Map
- Portfolio by Strategic Mix
- Portfolio by Type of Project
- Analyze Assignment Load
- Analyze Resource Pools

- 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 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 on the Personalize Dashboard page.

4. Select the portlet you want to move.

The portlet is highlighted.

5. Move the portlet.
 - To move the portlet around on the same PPM Dashboard page, hold the cursor down on the portlet and move the portlet to its new location.
 - To move the portlet to another PPM Dashboard page:
 - i. Expand the PPM Dashboard page where the portlet you want to move is grouped, and select the portlet.
 - ii. Click the **Copy** icon.
 - iii. Select the destination Dashboard page 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 52*.



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

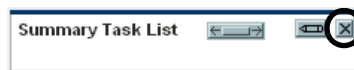
Deleting Portlets

Portlets can be deleted from PPM Dashboard pages by 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 .

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

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



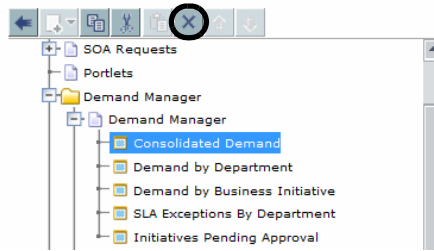
The portlet is deleted.

The changes to your PPM Dashboard are automatically saved.

To delete portlets in another way by using the Personalize Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.
3. Expand the PPM Dashboard page where the portlet you want to delete is grouped, and select the portlet.

4. Click **Delete** icon, or right click the portlet and select **Delete**.



The portlet is deleted.

The changes to you 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.

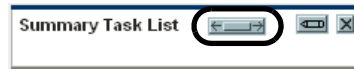
To change the width of portlets:

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.

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. And this configuration applies to list portlet only.

To change the maximized view setting of a portlet:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > <Dashboard_Page>**.
3. On the portlet, click **Edit** icon.

The portlet's edit page displays.


4. In the **Rows Displayed Maximized View** field of **Preferences** section, enter the number of rows you want to see in a maximized view.


Edit Preferences: Capitalized Project Breakdown (Capitalized Project Breakdown)


Change Title


Done Cancel


Preferences

Project Name: 

Project Manager: 


Project Status: 


Start Date From: 


Complete Date From: 


Min Planned Capital:

Min Planned Cost:

Business Objective: 


Project Health: 

Start Date To: 

Complete Date To: 

Min Carrying Value:

Min Actual Cost:

*Sort By:  ☒ Ascending ☐ Descending

*Rows Displayed:

*Rows Displayed in Maximized View:

Choose Display Columns

5. Click **Done**.

The new portlet maximized view setting is accepted.

Configuring Portlets

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

To configure a portlet:

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

The portlet's edit page displays.

Edit Preferences: Project Health Pie Chart ([Project Health Pie Chart](#))

Change Title

Done Cancel

Preferences

☒ Specific Projects: Whirlwind project; Corporte

☐ Projects matching criteria:

Project Manager:

Status:

☐ Include Finished Projects

Project Type:

Program:

Region:

*Project Health: ☒ ☒ ☒ ☐

No Health

Done Cancel

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 that 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 24](#).

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

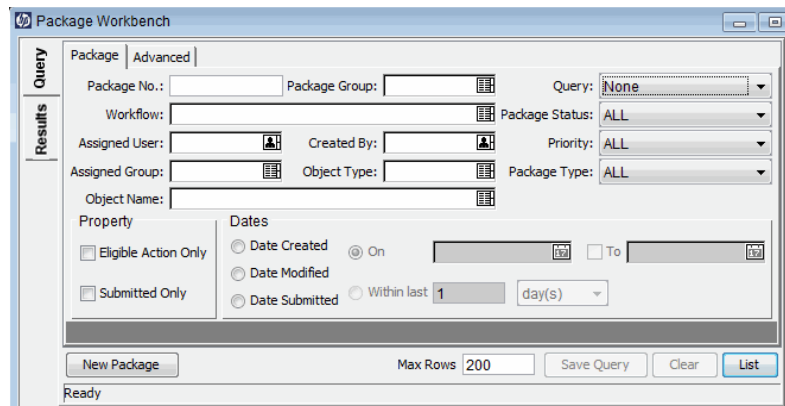
Filter fields are case insensitive. For example, entering the word **test** in a filter field would return **test**, **TEST**, and **Test**. Filter fields also return partial matches. For example, entering the word **test** in a filter field could return **Test Project** and **Testing Project**.

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

The screenshot shows the 'Package Workbench' window with the 'Query' tab selected. Within the 'Query' tab, the 'Advanced' sub-tab is active. The interface includes several filter fields: 'Package No.', 'Package Group', 'Workflow', 'Assigned User', 'Assigned Group', 'Object Name', 'Created By', 'Object Type', 'Query' (set to 'None'), 'Package Status' (set to 'ALL'), 'Priority' (set to 'ALL'), and 'Package Type' (set to 'ALL'). There are also checkboxes for 'Eligible Action Only' and 'Submitted Only'. A 'Dates' section contains radio buttons for 'Date Created', 'Date Modified', and 'Date Submitted', with a 'Within last' field set to '1' day(s). At the bottom, there are buttons for 'New Package', 'Max Rows' (set to 200), 'Save Query', 'Clear', and 'List'. The status bar at the very bottom indicates 'Ready'.

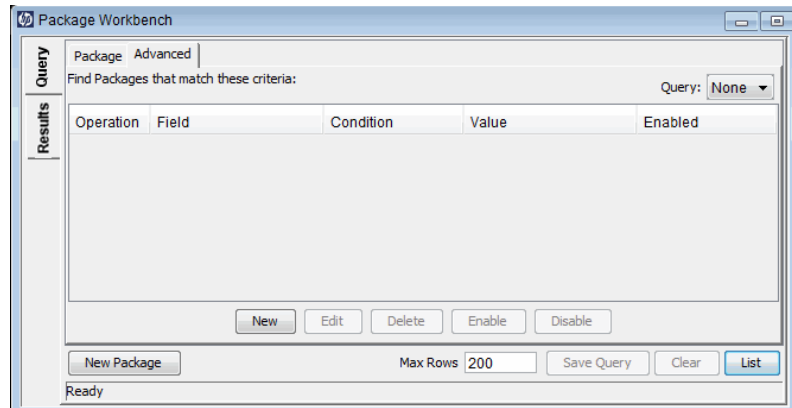
To enter advanced query criteria:

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.

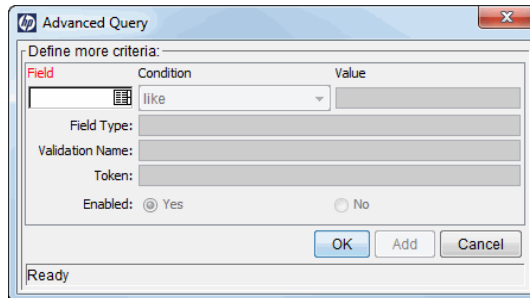
3. On the **Package** tab, complete the search criteria and click the **Advanced** tab.

The **Advanced** tab opens.



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

The Advanced Query window opens.

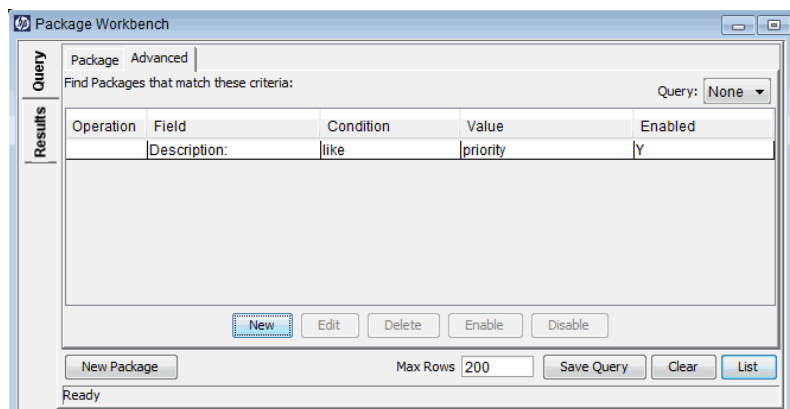


5. In the Advanced Query window, complete the filter fields and click **Add**.

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.



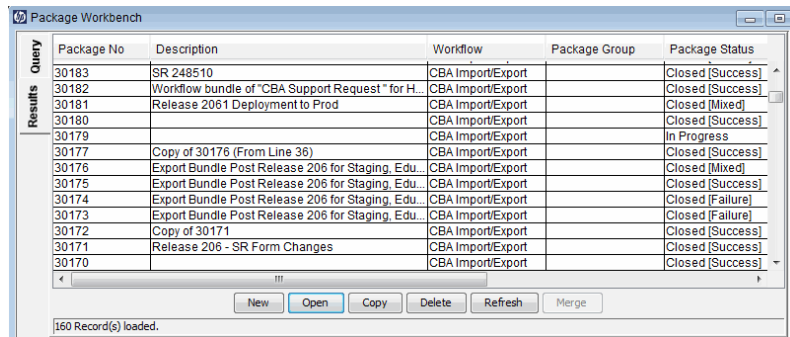
6. In the **Advanced** tab, click **List**.

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



The screenshot shows the 'Package Workbench' application window with the 'Results' tab selected. The table displays the following data:

Package No	Description	Workflow	Package Group	Package Status
30183	SR 248510	CBA Import/Export		Closed [Success]
30182	Workflow bundle of "CBA Support Request" for H...	CBA Import/Export		Closed [Success]
30181	Release 2061 Deployment to Prod	CBA Import/Export		Closed [Mixed]
30180		CBA Import/Export		Closed [Success]
30179		CBA Import/Export		In Progress
30177	Copy of 30176 (From Line 36)	CBA Import/Export		Closed [Success]
30176	Export Bundle Post Release 206 for Staging, Edu...	CBA Import/Export		Closed [Mixed]
30175	Export Bundle Post Release 206 for Staging, Edu...	CBA Import/Export		Closed [Success]
30174	Export Bundle Post Release 206 for Staging, Edu...	CBA Import/Export		Closed [Failure]
30173	Export Bundle Post Release 206 for Staging, Edu...	CBA Import/Export		Closed [Failure]
30172	Copy of 30171	CBA Import/Export		Closed [Success]
30171	Release 206 - SR Form Changes	CBA Import/Export		Closed [Success]
30170		CBA Import/Export		Closed [Success]

At the bottom of the window, it says '160 Record(s) loaded.' and there are buttons for 'New', 'Open', 'Copy', 'Delete', 'Refresh', and 'Merge'.

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.

