HP Project and Portfolio Management Center

Software Version: 9.20

Reports Guide and Reference

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

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

1 Getting Started with HP Project and Portfolio Management Center Reports

Introduction to HP Project and Portfolio Management Center Reports

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

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

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

- Product licenses
- Security group assignments

When you prepare to submit a report, you are presented with a set of filter fields from which you can specify the criteria for the report. The resulting report shows only the data that matches the criteria. Chapter 2, *Running Reports,* on page 13 describes how to create and submit report queries, as well as how to access and view the results. Chapter 8, *Report Types,* on page 171 provides information about report types, the mechanism you can use to create reports tailored to meet your business needs.

The majority of the PPM Center reports are submitted and viewed from the standard interface. Another type of report in PPM Center (not discussed in this document) are server reports, which gather administrative diagnostics and are submitted and viewed from the PPM Workbench. For information about server reports, see the *Installation and Administration Guide.*

Running and Viewing Reports in a Multilingual User Interface

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

Report Categories

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

- **Administrative.** These reports focus on administrative tasks and are available to users with a variety of licenses (depending on the report) and are detailed in Chapter 3, *Administrative Reports,* on page 31.

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

- **Deployment Management.** These reports are available to users with an HP Deployment Management application license and are detailed in Chapter 4, *Deployment Management Reports,* on page 67.

- **Demand Management.** These reports are available to users with an HP Demand Management application license and are detailed in Chapter 5, *Demand Management Reports,* on page 113.

- **Financial Management.** HP Financial Management reports are available to users with different licenses (depending on the report). These reports appear in multiple categories and are described in Chapter 6, *Project Management Reports,* on page 151.

- **Portfolio Management.** No HP-supplied reports are provided for HP Portfolio Management. However, this category is provided as a place to organize your company's portfolio management reports.
- **Program Management.** No reports are supplied for HP Program Management, but the category is provided for your convenience.
- **Project Management.** These reports are available to users with an HP Project Management application license and are detailed in Chapter 6, *Project Management Reports,* on page 151.
- **Resource Management.** These reports are available to users with different licenses (depending on the report). These reports appear in multiple categories and are described in Chapter 3, *Administrative Reports,* on page 31 and Chapter 7, *Time Management Reports,* on page 157.
- **Time Management.** These reports are available to users with an HP Time Management application license and are detailed in Chapter 7, *Time Management Reports,* on page 157.
- **Extension.** These reports are available to users with the applicable HP Deployment Management Extension license.

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

Related Information

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

The following documents include information related to PPM Center reports:

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

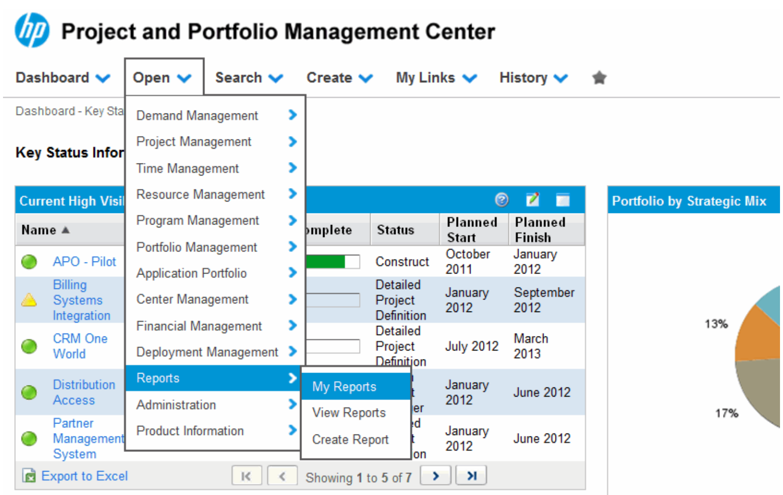
PPM Center also includes an optional operational reporting solution that is based on SAP Business Objects software. For information about PPM Center Operational Reporting, see the *Operational Reporting Administrator's Guide* and the *Operational Reporting User's Guide.*

2 Running Reports

Reports Menu

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

Figure 2-1. Reports menu in the standard interface



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

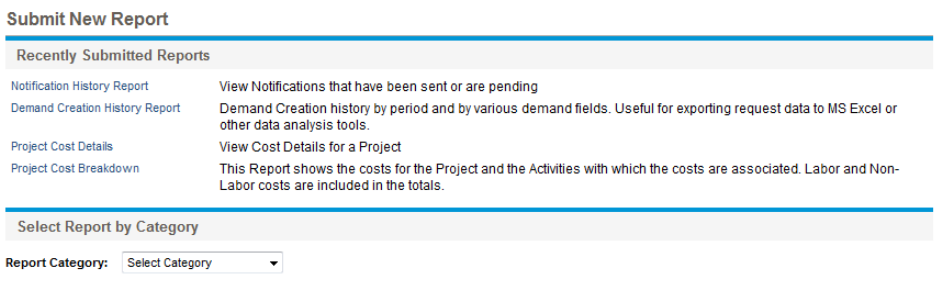
Submitting Reports

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

To submit a report:

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

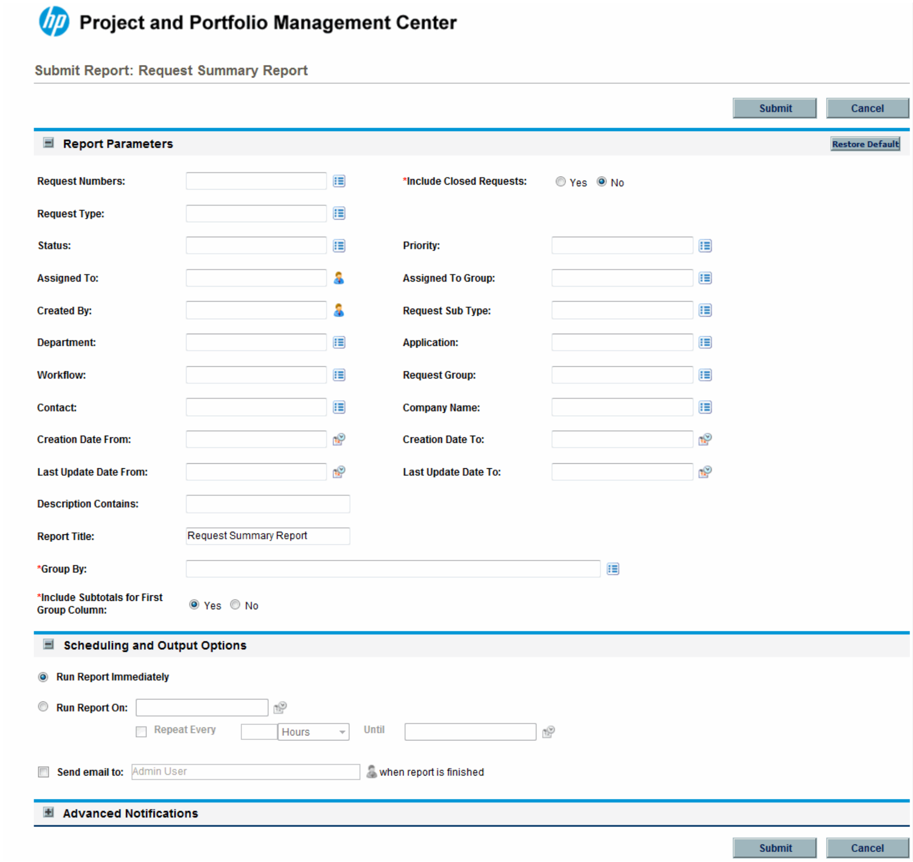
   The Submit New Report page opens.

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

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

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


Project and Portfolio Management Center
Submit Report: Request Summary Report
Submit
Cancel
Report Parameters
Restore Default
Request Numbers:
*Include Closed Requests:
Yes
No
Request Type:
Status:
Priority:
Assigned To:
Assigned To Group:
Created By:
Request Sub Type:
Department:
Application:
Workflow:
Request Group:
Contact:
Company Name:
Creation Date From:
Creation Date To:
Last Update Date From:
Last Update Date To:
Description Contains:
Report Title:
Request Summary Report
*Group By:
*Include Subtotals for First Group Column:
Yes
No
Scheduling and Output Options
Run Report Immediately
Run Report On:
Repeat Every
Hours
Until
Send email to:
Admin User
when report is finished
Advanced Notifications
Submit
Cancel

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

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

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

- The relevant chapter in this document (for example, to find information about HP Deployment Management reports, see Chapter 4, *Deployment Management Reports,* on page 67)
- The applicable HP Deployment Management Extension document (for example, to find information about report types related to Oracle E-Business Suite, see the *HP Deployment Management Extension for Oracle E-Business Suite Guide*)

4. Type or change information in the fields to define the report results you want.

5. To run the report at a later time, on a periodic basis, or provide a brief notification once the report is finished, expand the **Scheduling** section, and then follow the steps for the task you want to accomplish.

- To run the report (once) at a later time:

  a. Select **Run Report On**.

  b. Provide a valid date (using the field to the right of **Run Report On**).

- To run the report on a periodic basis:

  a. Select **Run Report On.**

  b. Provide the date when you want the report first run (using the field to the right of **Run Report On**).

  c. Select **Repeat Every.**

  d. Provide the frequency and the date when you want the report run last (using the three fields to the right of **Repeat Every**).

- To include a brief notification:

  a. Select **Send email to**.

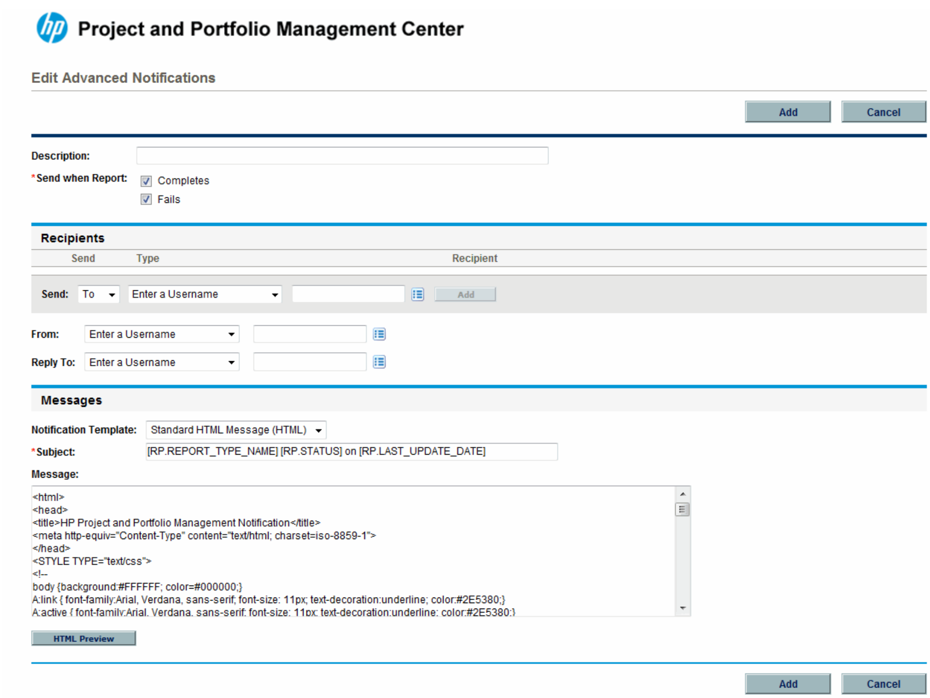
  b. Provide the user IDs of the users who should receive the notification (using the field to the right of **Send email to**).

6. To add a notification that has more comprehensive features than those available with **Send email to**:

   a. Expand the **Advanced Notifications** section.

   b. Click **Add a Notification.**

      The Edit Advanced Notifications window opens.



   c. Provide relevant information in this window.

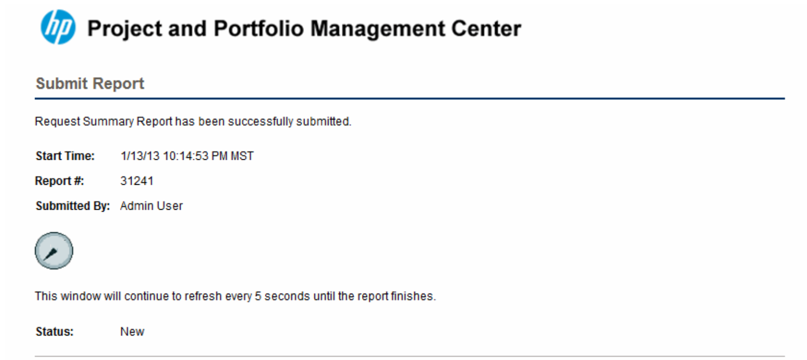
   d. Click **Add.**

      The Edit Advanced Notifications window closes.

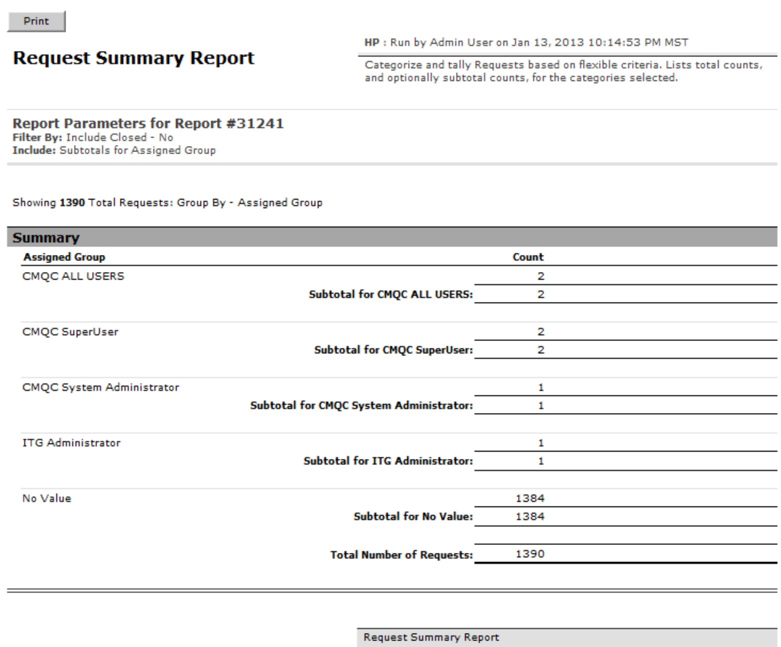
7. Click **Submit.**

- For reports that are run immediately:

a. The Submit Report window opens. The status is refreshed until the report is complete.



The completed report is displayed in a separate window.



Print

Request Summary Report

HP : Run by Admin User on Jan 13, 2013 10:14:53 PM MST

Categorize and tally Requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.

Report Parameters for Report #31241
Filter By: Include Closed - No
Include: Subtotals for Assigned Group

Showing **1390** Total Requests: Group By - Assigned Group

Summary

Assigned Group		Count
CMQC ALL USERS		2
	Subtotal for CMQC ALL USERS:	2
CMQC SuperUser		2
	Subtotal for CMQC SuperUser:	2
CMQC System Administrator		1
	Subtotal for CMQC System Administrator:	1
ITG Administrator		1
	Subtotal for ITG Administrator:	1
No Value		1384
	Subtotal for No Value:	1384
	Total Number of Requests:	1390

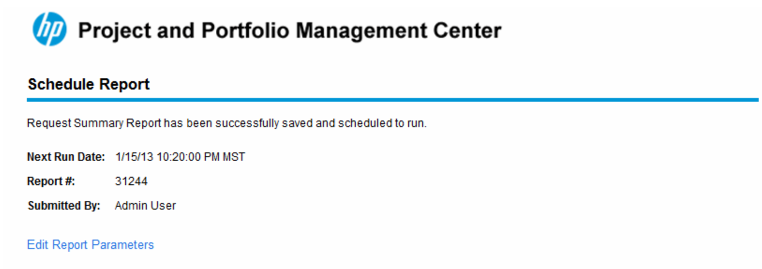
Request Summary Report

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

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

- For reports that are scheduled to run at a later time:

a. The Schedule Report window opens.



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

Viewing Previously Submitted Report Results

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

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

Using My Reports

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

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

The My Reports page opens. This page lists the results of the reports you submitted in the **Search Results: Reports** section. To specify search criteria, click the **Modify Search** button.

My Reports

Export to Excel | Modify Search

Search Results: Reports

	Report #	Report Type	Status	Created By	Run Date
☐	31244	Request Summary Report (Submission Details)	Scheduled	Admin User	1/15/13 10:20:00 PM MST
☐	31243	Request History Report (Submission Details)	Running	Admin User	1/13/13 10:17:36 PM MST
☐	31242	Request Summary Report (Submission Details)	Completed (Log)	Admin User	1/13/13 10:16:53 PM MST
☐	31241	Request Summary Report (Submission Details)	Completed (Log)	Admin User	1/13/13 10:14:53 PM MST
☐	31200	Contact Synchronization Report (Submission Details)	Completed (Log)	Admin User	1/12/12 05:31:28 AM MST
☐	31160	Contact Synchronization Report (Submission Details)	Completed (Log)	Admin User	1/10/12 03:37:55 AM MST
☐	31120	PPM Time Machine POC with Date Engine (Submission Details)	Completed (Log)	Admin User	8/29/11 06:03:54 PM MDT
☐	30970	PPM Time Machine POC with Date Engine (Submission Details)	Completed (Log)	Admin User	11/1/10 02:47:57 PM MDT
☐	30840	Contact Synchronization Report (Submission Details)	Completed (Log)	Admin User	1/5/10 06:47:30 AM MST
☐	30360	Synchronize Meta Layer (Submission Details)	Completed (Log)	Admin User	4/27/07 06:07:52 PM MDT
☐	30164	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:44:02 PM MST
☐	30162	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:40:36 PM MST
☐	30161	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:38:52 PM MST

Check All | Clear All | Delete | Dynamic Graphing

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

- In the **Report #** column, click the link for the report in the **Report #** column.

  a. In the **View Report #** box, type the report number.

  b. Click **Go.**

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

Print

Request Summary Report

HP : Run by Admin User on Jan 13, 2013 10:14:53 PM MST

Categorize and tally Requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.

Report Parameters for Report #31241
Filter By: Include Closed - No
Include: Subtotals for Assigned Group

Showing **1390** Total Requests: Group By - Assigned Group

Summary

Assigned Group		Count
CMQC ALL USERS		2
	Subtotal for CMQC ALL USERS:	2
CMQC SuperUser		2
	Subtotal for CMQC SuperUser:	2
CMQC System Administrator		1
	Subtotal for CMQC System Administrator:	1
ITG Administrator		1
	Subtotal for ITG Administrator:	1
No Value		1384
	Subtotal for No Value:	1384
	Total Number of Requests:	1390

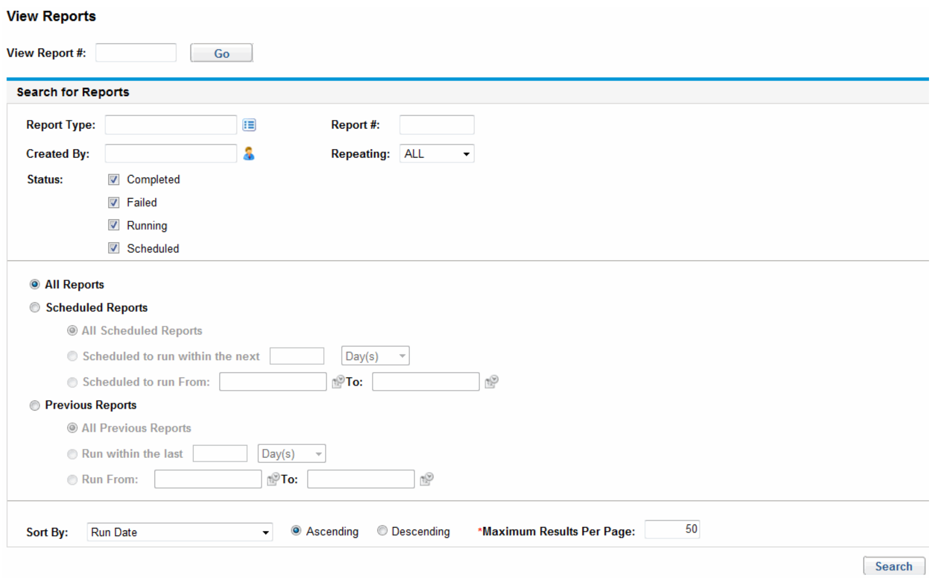
Request Summary Report

Using View Reports

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

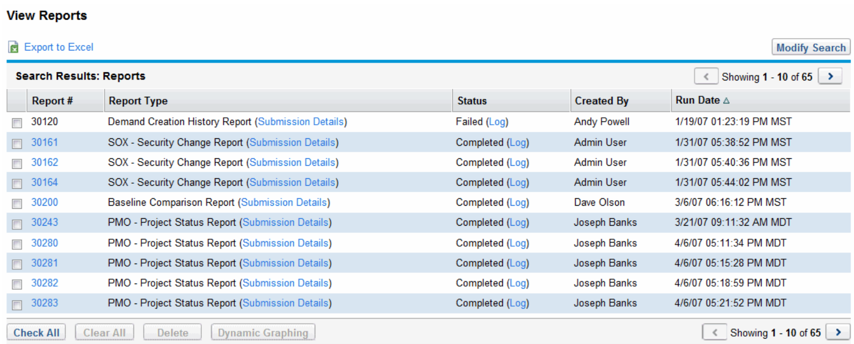
1. Log on to PPM Center.
2. From the menu bar, select **Open > Reports > View Reports.**

   The View Reports page opens.



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

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



View Reports

Export to Excel | Modify Search

Search Results: Reports — Showing **1 - 10** of **65**

	Report #	Report Type	Status	Created By	Run Date △
☐	30120	Demand Creation History Report (Submission Details)	Failed (Log)	Andy Powell	1/19/07 01:23:19 PM MST
☐	30161	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:38:52 PM MST
☐	30162	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:40:36 PM MST
☐	30164	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:44:02 PM MST
☐	30200	Baseline Comparison Report (Submission Details)	Completed (Log)	Dave Olson	3/6/07 06:16:12 PM MST
☐	30243	PMO - Project Status Report (Submission Details)	Completed (Log)	Joseph Banks	3/21/07 09:11:32 AM MDT
☐	30280	PMO - Project Status Report (Submission Details)	Completed (Log)	Joseph Banks	4/6/07 05:11:34 PM MDT
☐	30281	PMO - Project Status Report (Submission Details)	Completed (Log)	Joseph Banks	4/6/07 05:15:28 PM MDT
☐	30282	PMO - Project Status Report (Submission Details)	Completed (Log)	Joseph Banks	4/6/07 05:18:59 PM MDT
☐	30283	PMO - Project Status Report (Submission Details)	Completed (Log)	Joseph Banks	4/6/07 05:21:52 PM MDT

Check All | Clear All | Delete | Dynamic Graphing — Showing **1 - 10** of **65**

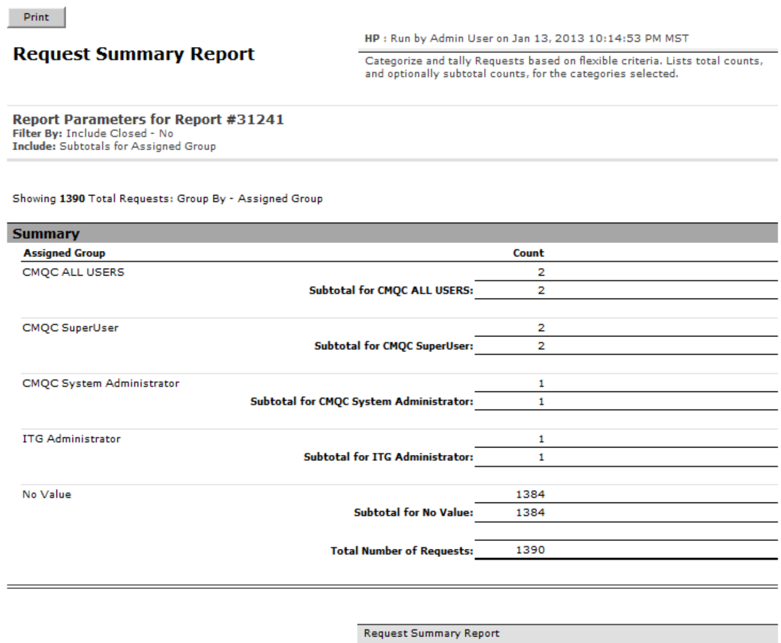
4. To view the report results, do one of the following:

- In the **Report #** column, click the report link.

a. In **View Report #** box, type the report number.

b. Click **Go.**

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



Print

Request Summary Report

HP : Run by Admin User on Jan 13, 2013 10:14:53 PM MST

Categorize and tally Requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.

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Include: Subtotals for Assigned Group

Showing **1390** Total Requests: Group By - Assigned Group

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Assigned Group		Count
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CMQC SuperUser		2
	Subtotal for CMQC SuperUser:	2
CMQC System Administrator		1
	Subtotal for CMQC System Administrator:	1
ITG Administrator		1
	Subtotal for ITG Administrator:	1
No Value		1384
	Subtotal for No Value:	1384
	Total Number of Requests:	1390

Request Summary Report

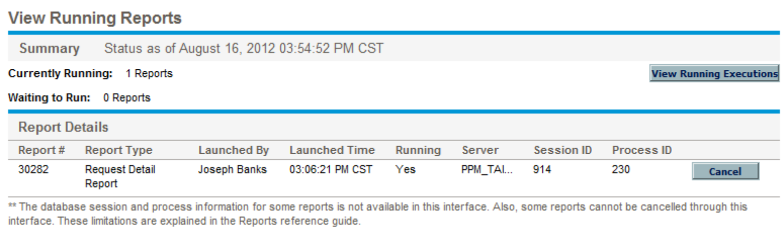
Viewing and Cancelling Running Reports

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

To view, and optionally cancel, a running report:

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

   The View Running Reports page opens.

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

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

Field Name	Description
Summary section	
Currently Running	Provides the number of reports currently running.
Waiting to Run	Number of submitted reports waiting to run. These are not the reports that are scheduled to run. Rather, they are not running because of current load on the system and will run as soon as the current report runs are completed.
Report Details section	
Report #	Report ID.

Field Name	Description
Report Type	Report name.
Launched By	Full name of the user who submitted the report.
Launched Time	Time at which the report was submitted.
Running	Indicates whether the report is running (**Yes**) or waiting (**No**).
Server	Name of the PPM Server running the report.
Session ID	Oracle database session ID for the session that the report uses to query data.
Process ID	Oracle database process ID for the process that the report uses.
Cancel	Cancels a report that is currently running or waiting to be run. You can cancel only the reports listed in *Reports That Can Be Cancelled* on page 28.

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

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

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

Reports That Can Be Cancelled

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

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

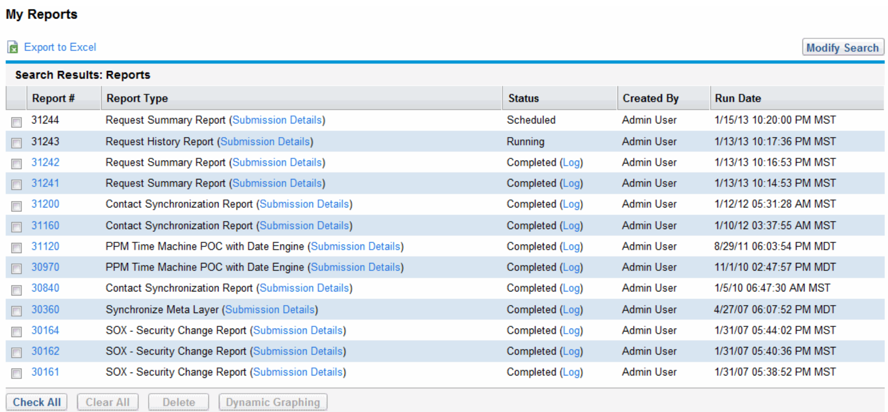
Deleting Report Results

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

To delete report results:

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

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



My Reports

Export to Excel | Modify Search

Search Results: Reports

	Report #	Report Type	Status	Created By	Run Date
☐	31244	Request Summary Report (Submission Details)	Scheduled	Admin User	1/15/13 10:20:00 PM MST
☐	31243	Request History Report (Submission Details)	Running	Admin User	1/13/13 10:17:36 PM MST
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☐	31241	Request Summary Report (Submission Details)	Completed (Log)	Admin User	1/13/13 10:14:53 PM MST
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☐	31160	Contact Synchronization Report (Submission Details)	Completed (Log)	Admin User	1/10/12 03:37:55 AM MST
☐	31120	PPM Time Machine POC with Date Engine (Submission Details)	Completed (Log)	Admin User	8/29/11 06:03:54 PM MDT
☐	30970	PPM Time Machine POC with Date Engine (Submission Details)	Completed (Log)	Admin User	11/1/10 02:47:57 PM MDT
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☐	30360	Synchronize Meta Layer (Submission Details)	Completed (Log)	Admin User	4/27/07 06:07:52 PM MDT
☐	30164	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:44:02 PM MST
☐	30162	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:40:36 PM MST
☐	30161	SOX - Security Change Report (Submission Details)	Completed (Log)	Admin User	1/31/07 05:38:52 PM MST

Check All | Clear All | Delete | Dynamic Graphing

3. You can delete one or more report results.

- To delete all the report results:

a. Click **Check All.**

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

b. Click **Delete.**

- To delete one or more report results:

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

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

b. Click **Delete.**

3 Administrative Reports

Contact Synchronization Report

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

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

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

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

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

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

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

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

Figure 3-1. Contact Synchronization report fields

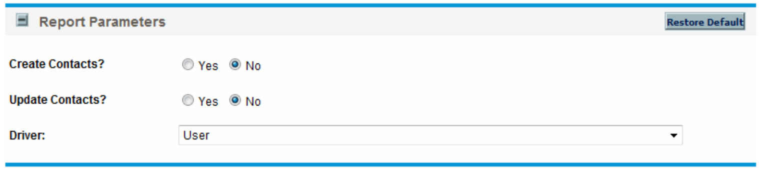


Table 3-1. Contact Synchronization report field descriptions

Field Name	Description
Create Contacts	Option to create contacts for users who have no associated contact records. Note that some of these contacts may need to be manually associated with users. Choices include: • **Yes.** To create new contact records. • **No.** To review the results of the report without creating any contacts. HP recommends that you run the report using **No,** so that you can verify the correct processing of the section listing contacts that have the same first and last names as a PPM Center user. If no manual updates are required, then select **Yes,** and then rerun the report.
Update Contacts	Determines whether PPM Center creates or updates contacts for users associated with a contact whose name, email, or enabled status is out-of-date. To update contact records, click **Yes.** To review the report results without updating contacts, click **No.** HP recommends that you run this report with **No** selected, so that you can verify the correct processing of the section detailing associated user and contact pairs that have different data in common fields. If no manual updates are required, then select **Yes** and rerun the report.
Driver	Determines how records are to be synchronized. Select one of the following: • To synchronize records based on the user record, select **User.** • To synchronize records based on the contact record, select **Contact.** • To synchronize records based on the most recently updated record, select **Last Update Date.**

Data Source Detail Report

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

Figure 3-2. Data Source Detail report fields

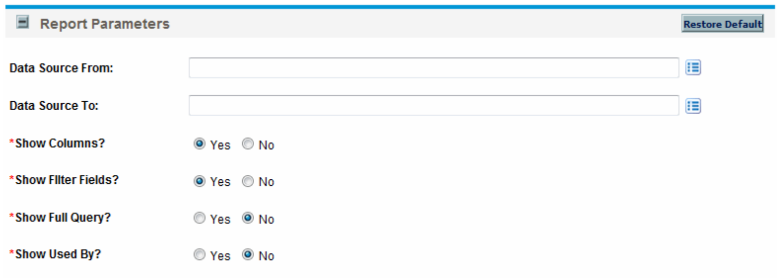


Table 3-2. Data Source Detail report field descriptions

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

Import Requests Report

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

Import Users Report

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

Lookup Types Report

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

Figure 3-3. Lookup Types report fields

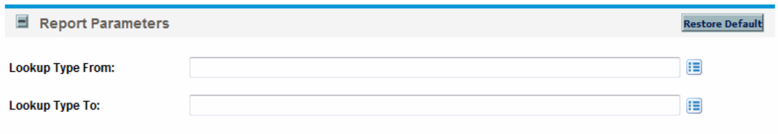


Table 3-3. Lookup Types report field descriptions

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

Notification History Report

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

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

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

Figure 3-4. Notification History report fields

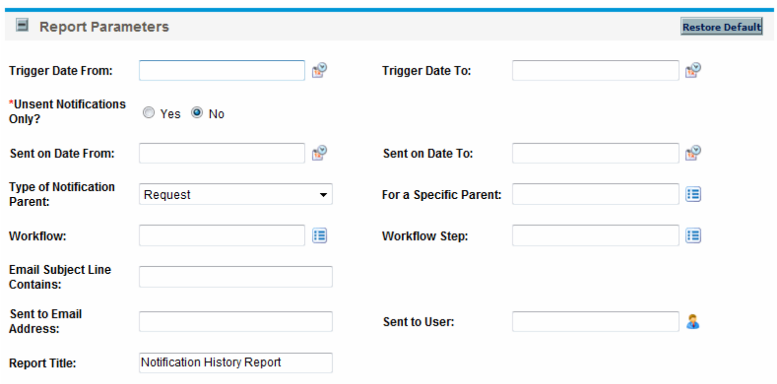


Table 3-4. Notification History report field descriptions

Field Name (*Required)	Description
Trigger Date From	Select the starting date. The report includes notifications triggered on or after this date.
Trigger Date To	Select the ending date. The report includes notifications triggered on or before this date.
*Unsent Notifications Only	Option to show only unsent notifications.
Sent on Date From	Select the starting date. The report includes notifications sent on or after this date.
Sent on Date To	Select the ending date. The report includes notifications sent on or before this date.
Type of Notification Parent	Select one of the following parent types: • **Request** • **Package** • **Project** • **Module**
For a Specific Parent	Select a parent entity from the entities available on your PPM Center instance.
Workflow	Select a workflow from the workflows available on your PPM Center instance.
Workflow Step	Select a particular workflow step associated with **Workflow.**
Email Subject Line Contains	Email subject line. Type any alphanumeric string (200 characters maximum).
Sent to Email Address	Email address of recipient. Type any alphanumeric string (200 characters maximum).
Sent to User	Specify the user from the users available on your PPM Center instance.
Report Title	Type a unique report title (200 characters maximum).

Object Type Detail Report

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

This report is useful for the following:

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

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

Figure 3-5. Object Type Detail report fields

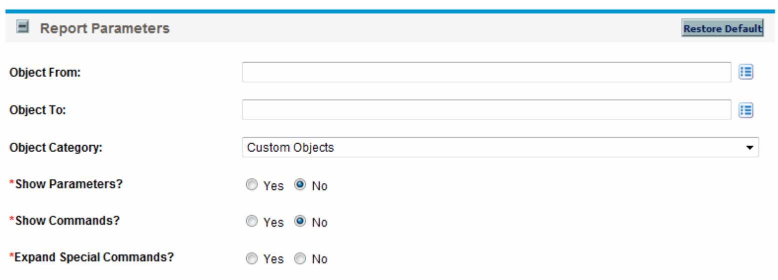


Table 3-5. Object Type Detail report field descriptions

Field Name (*Required)	Description
Object From	Starting object. The report includes object types with names equal to or greater than this value for the object types available on your PPM Center instance.
Object To	Ending object. The report includes object types with names equal to or less than this value for the object types available on your PPM Center instance.
Object Category	The report includes an object category from the categories available on your PPM Center instance.
*Show Parameters	Option to show the parameters and validations.
*Show Commands	Option to show the commands and command steps.
*Expand Special Commands	Option to expand user-defined special commands.

Overview Section Detail Report

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

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

Figure 3-6. Overview Section Detail report fields

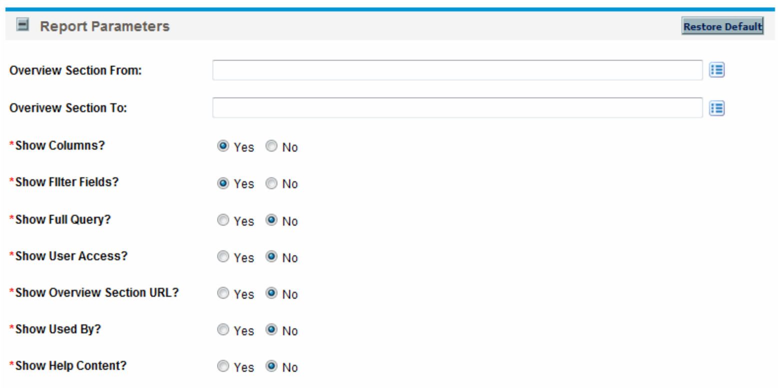


Table 3-6. Overview Section Detail report field descriptions

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

Portlet Definition Detail Report

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

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

Figure 3-7. Portlet Definition Detail report fields

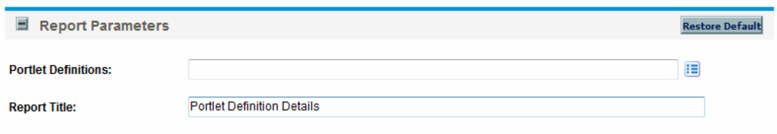


Table 3-7. Portlet Definition Detail report field descriptions

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

Portlet Performance Report

The Portlet Performance report displays one or both of the following set of performance results for a page or selected portlets:

- Aggregated average execution time, and maximum, minimum, and total time to invoke the page or portlets
- Information about the page or portlet with the worst execution time

For more information about this portlet, see the *Installation and Administration Guide.*

Purge Empty Time Sheet Lines Report

The Purge Empty Time Sheet Lines report purges empty time sheet lines from the database.

An empty time sheet lines is defined as a line in which no actual effort has been entered. This does not mean a time sheet that has a total effort of 0 because you are allowed to enter negative time as effor.

To run the Purge Empty Time Sheet Lines report, you must have a User Administration license.

Figure 3-8. Purge Empty Time Sheet Lines report fields

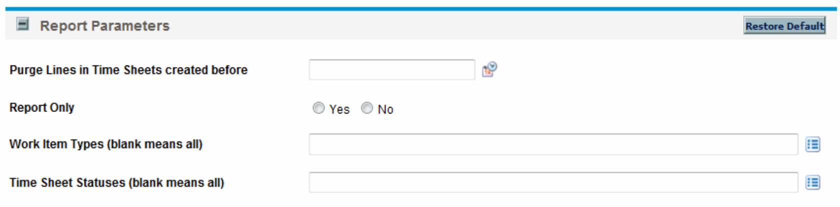


Table 3-8. Purge Empty Time Sheet Lines report field descriptions (page 1 of 2)

Field Name(*Required)	Description
*Purge Lines in Time Sheets created before	Specifies the time threshold of the purge. Only time sheets with period end dates prior to this date will have empty lines deleted.
Report Only	Indicates whether or not to generate a report without deleting the eligible empty time sheet lines. If you set this field to Yes, no lines will be deleted. In this case, only a report of the empty lines that are eligible to delete is generated.

Table 3-8. Purge Empty Time Sheet Lines report field descriptions (page 2 of 2)

Field Name(*Required)	Description
Work Item Types	Specifies which work item types are eligible to have empty lines deleted.
Time Sheet Statuses	Specifies the states of time sheets to process. Only time sheets in the specified states will have empty lines deleted. Cjoices include: • **Closed** • **Canceled** • **Frozen**

Report Type Detail Report

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

Figure 3-9. Report Type Detail report fields

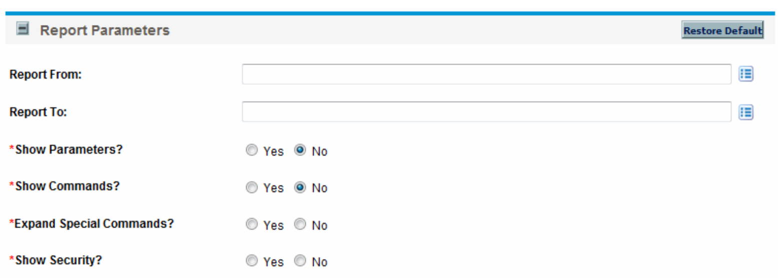


Table 3-9. Report Type Detail report field descriptions

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

Request Header Type Detail Report

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

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

Figure 3-10. Request Header Type Detail report fields

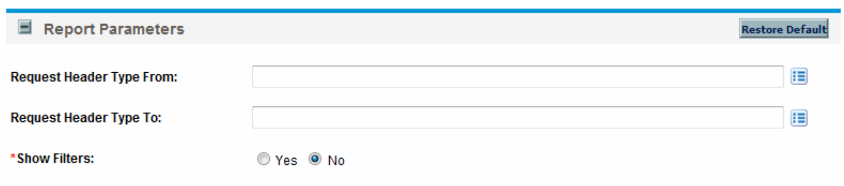


Table 3-10. Request Header Type Detail report field descriptions

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

Request Type Detail Report

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

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

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

Figure 3-11. Request Type Detail report fields

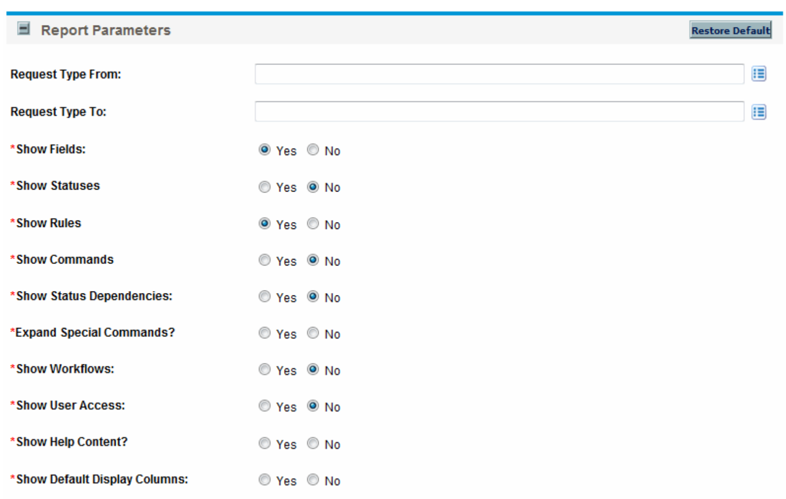


Table 3-11. Request Type Detail report field descriptions

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

Run Field Security Denormalization Report

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

Figure 3-12. Run Field Security Denormalization report fields

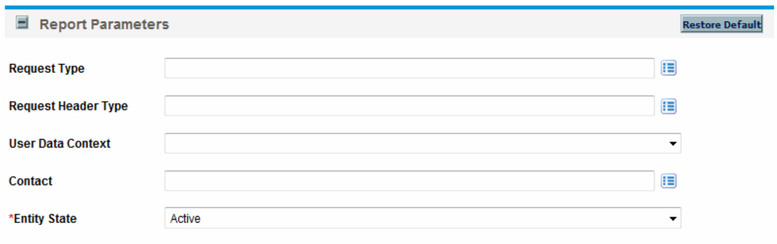


Table 3-12. Run Field Security Denormalization report field descriptions

Field Name (*Required)	Description
Request Type	Select a request type from the request types available on your PPM Center instance.
Request Header Type	Select a request header type from the request header types available on your PPM Center instance.
User Data Context	Select a user data context from the user data available on your PPM Center instance.
Contact	Select a contact from the contacts available on your PPM Center instance.
*Entity State	Select one of the following states: • **Active** • **All** • **Closed**

Run PPM Organization Unit Interface Report

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

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

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

Run PPM Package Interface Report

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

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

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

Run Workflow Transaction Interface Report

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

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

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

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

SOX - Security Change Report

This report provides the history of security changes.

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

Figure 3-13. SOX - Security Change report fields

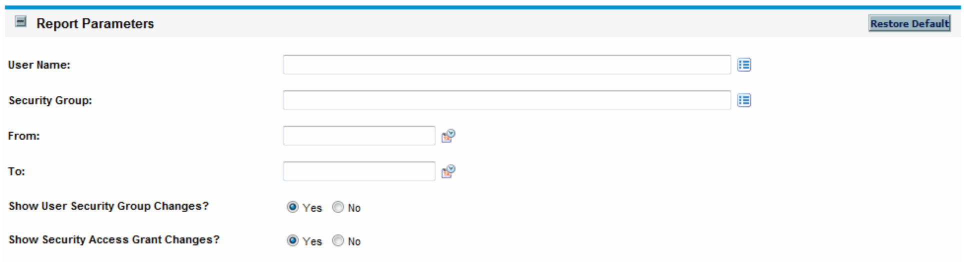


Table 3-13. SOX - Security Change report field descriptions

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

SOX - Security Validation Report

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

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

Figure 3-14. SOX - Security Validation report fields

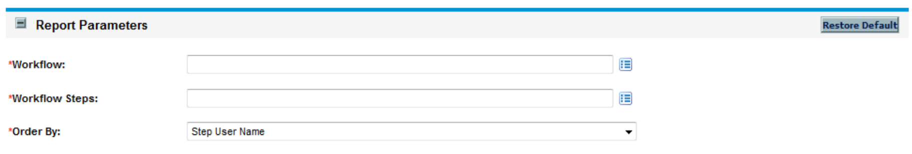


Table 3-14. SOX - Security Validation report field descriptions

Field Name (*Required)	Description
*Workflow	Select a workflow.
*Workflow Steps	Select one or more workflow steps associated with **Workflow.**
*Order By	Select the sort criteria. Choices include: • **Step User Name** • **Step Name** • **Security Group Name**

Security Group Detail Report

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

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

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

Figure 3-15. Security Group Detail report fields

Table 3-15. Security Group Detail report field descriptions

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

Special Command Detail Report

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

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

Figure 3-16. Special Command Detail report fields

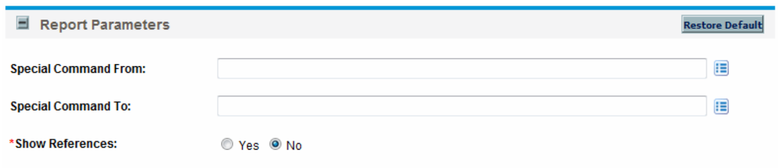


Table 3-16. Special Command Detail report field descriptions

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

Synchronize Meta Layer Report

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

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

Figure 3-17. Synchronize Meta Layer report fields

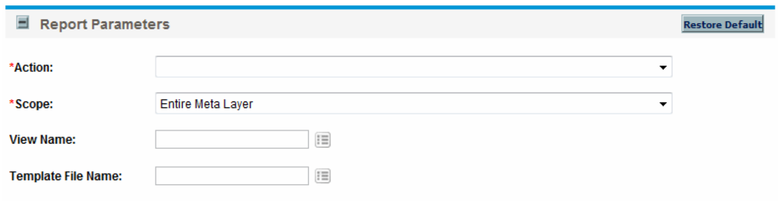


Table 3-17. Synchronize Meta Layer report field descriptions

Field Name (*Required)	Description
*Action	Select an action from the actions available on your PPM Center instance.
*Scope	Select a scope. Choices include: • **Entire Meta Layer.** To include all of the RML. • **Specific View.** To limit the **Action** to a specific view. • **Specific Template.** To limit the **Action** to a specific template.
View Name	Select a Meta Layer view name from the views available on your PPM Center instance. This field is enabled only if **Specific View** is selected in the **Scope** field.
Template File Name	Select a Meta Layer template name from the templates available on your PPM Center instance. This field is enabled only if **Specific Template** is selected in the **Scope** field.

Translation Details Report

For information about the Translation Details report, see the *Multilingual User Interface Guide.*

Translation Summary Report

For information about the Translation Summary report, see the *Multilingual User Interface Guide.*

User Data Detail Report

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

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

Figure 3-18. User Data Detail report fields

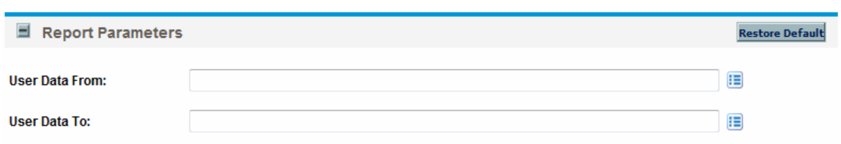


Table 3-18. User Data Detail report field descriptions

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

User Detail Report

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

This report also appears in the Resource Management category.

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

Figure 3-19. User Detail report fields

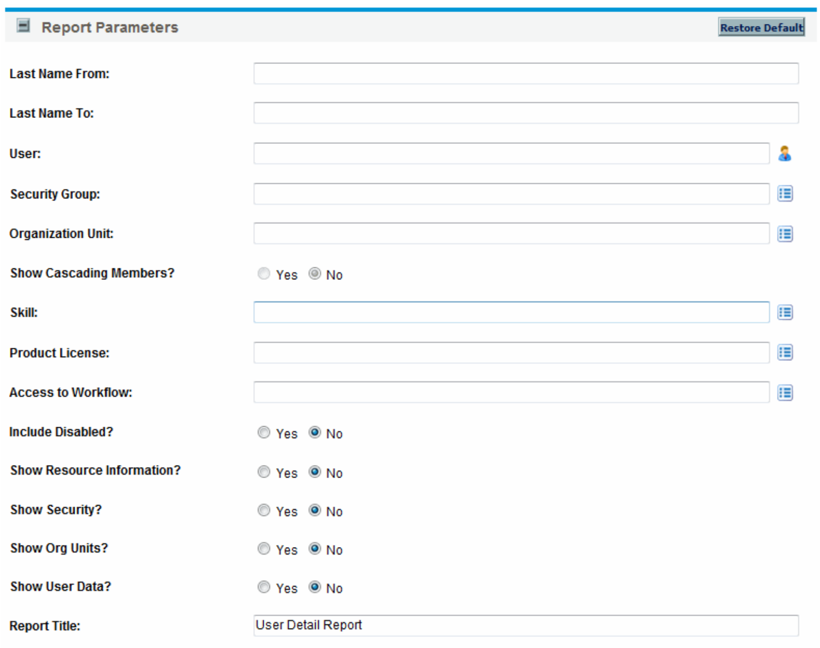


Table 3-19. User Detail report field descriptions

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

Validations Report

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

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

Figure 3-20. Validations report fields

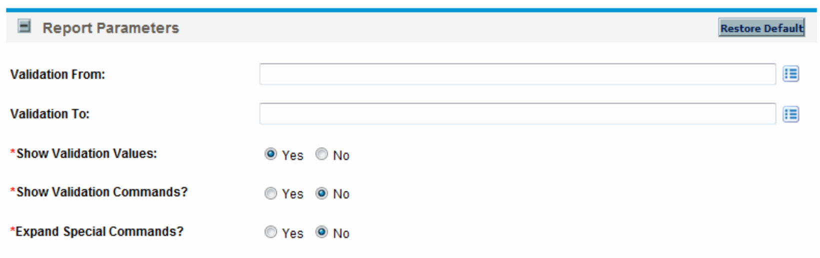


Table 3-20. Validations report field descriptions

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

Workflow Detail Report

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

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

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

Figure 3-21. Workflow Detail report fields

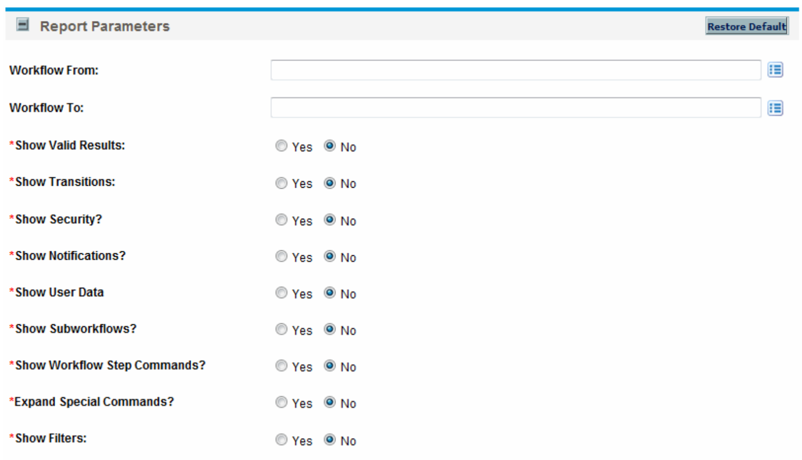


Table 3-21. Workflow Detail report field descriptions

Field Name (*Required)	Description
Workflow From	Select the starting workflow. The report will include only workflows whose names are equal to or greater than this value for those workflows that are available on your PPM Center instance.
Workflow To	Select the ending workflow. The report will include only workflows whose names are equal to or less than this value for those workflows that are available on your PPM Center instance.
*Show Valid Results	Option to show the valid result values for each workflow step.
*Show Transitions	Option to show the transitions in and out of each workflow step.
*Show Security	Option to show the security groups that have access to act on each workflow step.
*Show Notifications	Option to show the notifications attached to each workflow step.
*Show User Data	Option to show the user data custom fields.
*Show Subworkflows	Option to show subworkflows.
*Show Workflow Step Commands	Option to show the workflow step commands if a step is a command execution step.
*Expand Special Commands	Option to expand user-defined special commands.
*Show Filters	Option to show information about field filtering for Deployment Management header fields.

Workflow Statistics Report

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

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

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

Figure 3-22. Workflow Statistics report fields

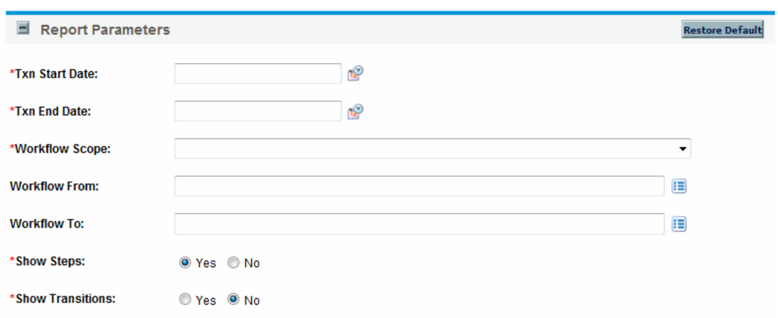


Table 3-22. Workflow Statistics report field descriptions

Field Name (*Required)	Description
*Txn Start Date	Select the starting date. The report will include only transactions started on or after this date.
*Txn End Date	Select the ending date. The report will include only transactions started on or before this date.
*Workflow Scope	Select a scope from the workflow scopes available on your PPM Center instance.
Workflow From	Select the starting workflow. The report will include only workflows whose names are equal to or greater than this value for those workflows that are available on your PPM Center instance.
Workflow To	Select the ending workflow. The report will include only workflows whose names are equal to or less than this value for those workflows that are available on your PPM Center instance.
*Show Steps	Option to show the statistical analysis for individual workflow steps.
*Show Transitions	Option to show the statistical analysis of the transaction history for each workflow.

4 Deployment Management Reports

Compare Custom Database Setup Report

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

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

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

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

Figure 4-1. Compare Custom Database Setup report fields

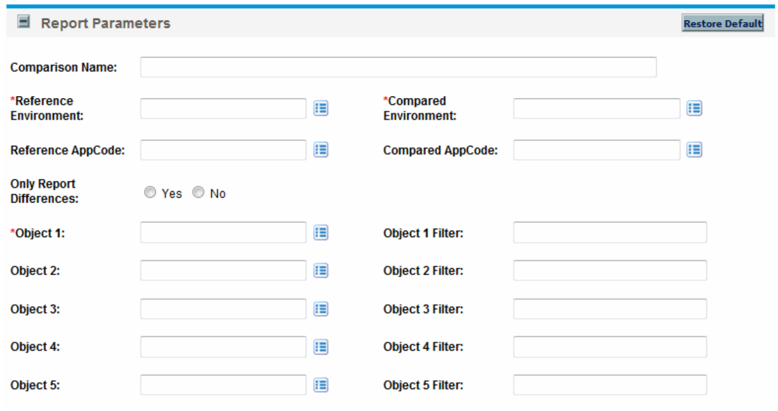


Table 4-1. Compare Custom Database Setup report field descriptions

Field Name (*Required)	Description
Comparison Name	Type a unique name for the report (200 characters maximum).
*Reference Environment	Select a reference environment from the environments available on your PPM Center instance.
*Compared Environment	Select an environment available on your PPM Center instance to compare to the reference environment you selected.
Reference AppCode	Select an application code available on your PPM Center instance to be used to override the parameters for the reference environment.
Compared AppCode	From the application codes available on your PPM Center instance, select one to be used to override the parameters for the compared environment.
Only Report Differences	Option to display only the differences between the two environments.
*Object 1 Object 2–5	Select the custom SQL Server or Oracle objects from those objects available on your PPM Center instance.
Object 1–5 Filter	Type the values for the selected objects (200 characters maximum).

Compare Filesystem Environments Report

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

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

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

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

Figure 4-2. Compare Filesystem Environments report fields

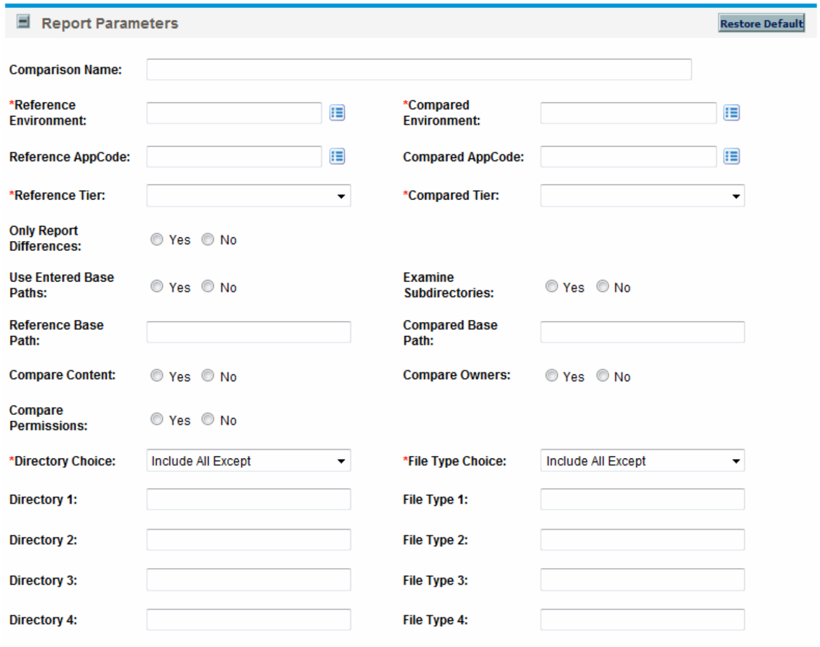


Table 4-2. Compare Filesystem Environments report field descriptions (page 1 of 2)

Field Name (*Required)	Description
Comparison Name	Type a unique report name (up to 200 characters).
*Reference Environment	Select a reference environment from the environments available on your PPM Center instance.
*Compared Environment	From the environments available on your PPM Center instance, select an environment to compare with the reference environment you selected.
Reference AppCode	From the application codes available on your PPM Center instance, select the application code to use to override the parameters for the reference environment.
Compared AppCode	Select the application code to be used to override the parameters for the compared environment from those application codes available on your PPM Center instance.
*Reference Tier	Select one of the following: • **Server** • **Client**
*Compared Tier	Select one of the following: • **Server** • **Client**
Only Report Differences	Option to display only the differences between the two environments.
Use Entered Base Paths	Option to use the base paths specified in **Reference Base Path** and **Compared Base Path.**
Examine Subdirectories	Indicates whether to include subdirectories.
Reference Base Path	Type the base path for the reference environment (200 characters maximum).
Compared Base Path	Type the base path for the compared environment (200 characters maximum).
Compare Content	Option to compare the contents of each file.

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

Field Name (*Required)	Description
Compare Owners	Option to compare the ownership of each file, including directories.
Compare Permissions	Option to compare the permissions of each file, including directories.
*Directory Choice	To specify which directories to include, select one of the following: • **Include All Except.** Include all directories except for those specified in **Directory 1–4.** • **Exclude All Except.** Exclude all directories except for those specified in **Directory 1–4.**
*File Type Choice	To specify the file types to include, select one of the following: • **Include All Except.** Include all file types except for those specified in **File Type 1–4.** • **Exclude All Except.** Exclude all file types except for those specified in **File Type 1–4.**
Directory 1–4	Type the directories associated with **Directory Choice** (200 characters maximum).
File Type 1–4	Type the file types associated with **File Type Choice** (200 characters maximum).

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

Compare MS SQL Server 7 Environments Report

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

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

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

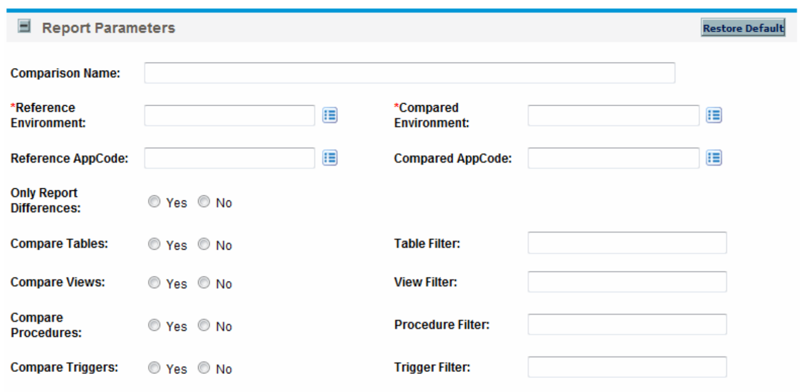


Table 4-3. Compare Custom Database Setup report field descriptions

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

Compare Oracle Environments Report

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

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

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

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

Figure 4-4. Compare Oracle Environments report fields

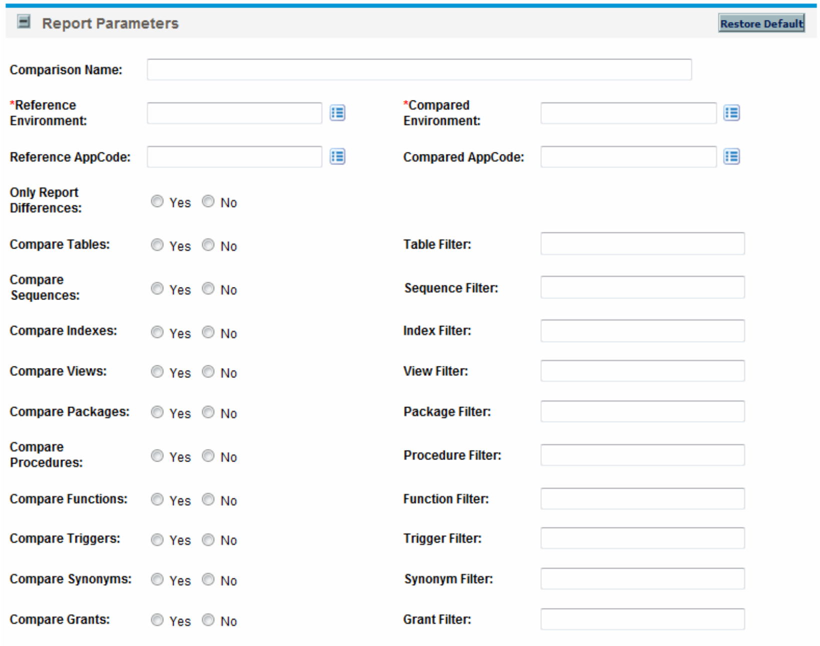


Table 4-4. Compare Oracle Environments report field descriptions (page 1 of 2)

Field Name (*Required)	Description
Comparison Name	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
*Reference Environment	Select a reference environment, the first environment, from the environments available on your PPM Center instance.
*Compared Environment	Select the second environment from the environments available on your PPM Center instance.
Reference AppCode	Select the application code to be used to override the parameters for the reference environment from the application codes available on your PPM Center instance.
Compared AppCode	Specify the application code to be used to override the parameters for the compared environment from the application codes available on your PPM Center instance.
Only Report Differences	Option to display only the differences between the two environments.
Compare Tables	Option to compare tables.
Table Filter	Specify a table. Type any alphanumeric string (up to 200 characters in length).
Compare Sequences	Option to compare sequences.
Sequence Filter	Specify a sequence. Type any alphanumeric string (up to 200 characters in length).
Compare Indexes	Option to compare indexes.
Index Filter	Specify an index. Type any alphanumeric string (up to 200 characters in length).
Compare Views	Option to compare views.
View Filter	Specify a view. Type any alphanumeric string (up to 200 characters in length).
Compare Packages	Option to compare packages.

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

Field Name (*Required)	Description
Package Filter	Specify a package. Type any alphanumeric string (up to 200 characters in length).
Compare Procedures	Option to compare procedures.
Procedure Filter	Specify a procedure. Type any alphanumeric string (up to 200 characters in length).
Compare Functions	Option to compare functions.
Function Filter	Specify a function. Type any alphanumeric string (up to 200 characters in length).
Compare Triggers	Option to compare triggers.
Trigger Filter	Specify a trigger. Type any alphanumeric string (up to 200 characters in length).
Compare Synonyms	Option to compare synonyms.
Synonym Filter	Specify a synonym. Type any alphanumeric string (up to 200 characters in length).
Compare Grants	Option to compare grants.
Grant Filter	Specify a grant. Type any alphanumeric string (up to 200 characters in length).

Distribution Detail Report

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

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

Figure 4-5. Distribution Detail report fields

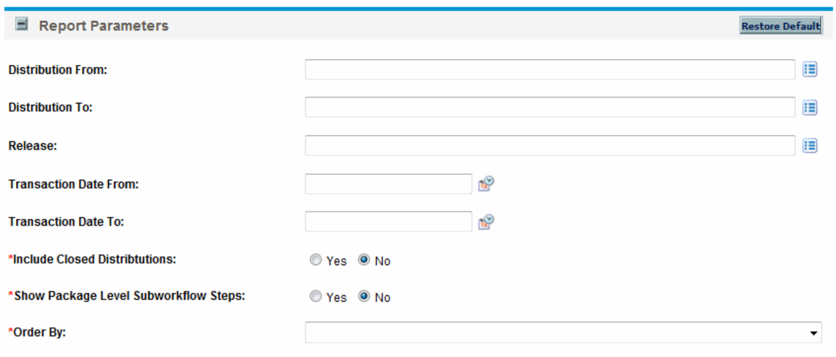


Table 4-5. Distribution Detail report field descriptions

Field Name (*Required)	Description
Distribution From	Select the starting distribution. The report will include only distributions whose names are equal to or greater than this value for those distributions that are available on your PPM Center instance.
Distribution To	Select the ending distribution. The report will include only distributions whose names are equal to or less than this value for those distributions that are available on your PPM Center instance.
Release	Select a release from the product releases available on your PPM Center instance.
Transaction Date From	Select the starting date. The report will include only transactions started on or after this date.
Transaction Date To	Type a valid end date. The report will include only transactions started on or before this date.
*Include Closed Distribtutions	Option to include closed distributions.
*Show Package level Subworkflow Steps	Option to show subworkflow steps at the package level.
*Order By	Select one of the following sort criteria: • **Distribution Name** • **Release**

Environment Comparison Report

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

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

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

Figure 4-6. Environment Comparison report fields

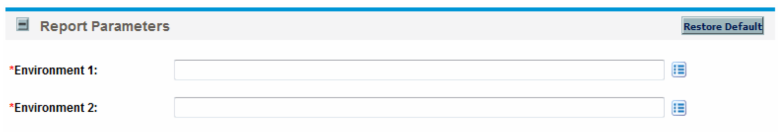


Table 4-6. Environment Comparison report field descriptions

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

Environment Comparison by Objects Migrated Report

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

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

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

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

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

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

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

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

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

Environment Detail Report

The Environment Detail report Includes the following information:

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

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

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

Figure 4-8. Environment Detail report fields

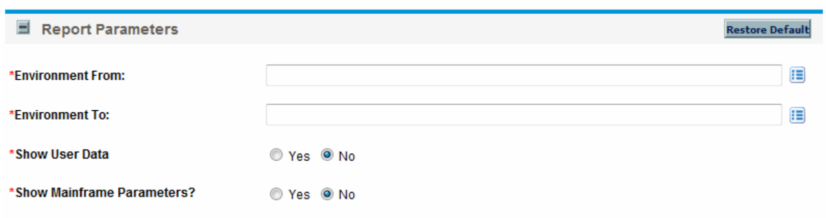


Table 4-8. Environment Detail report field descriptions

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

Environment Group Detail Report

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

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

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

- PFM - Finance Review Board
- PFM - IT Steering Committee
- PFM - Standards Committee
- PPM 6.0 Upgrade Workbench Access
- PPM Administrator
- PPM All Access Grants
- PPM Billing Manager
- PPM Cost Manager
- PPM Demand Management Administrator
- PPM Demand Manager
- PPM Deployment Management Administrator
- PPM Program Manager
- PPM Project Manager
- PPM Resource Manager

- PPM Service Security Group
- PPM Team Manager
- PPM Time Administrator
- PPM Time Manager
- PPM User
- PPM User Admin

Figure 4-9. Environment Group Detail report fields

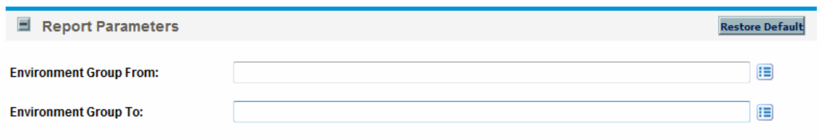


Table 4-9. Environment Group Detail report field descriptions

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

Environments / Objects Detail Report

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

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

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

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

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

Figure 4-10. Environments / Objects Detail report fields

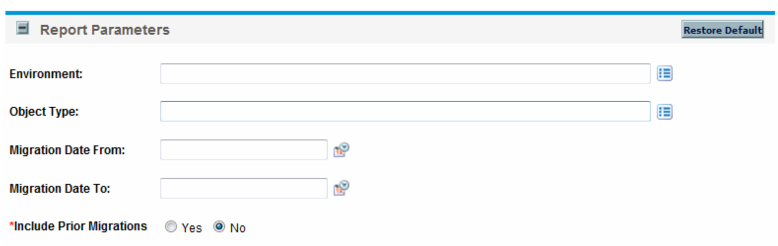


Table 4-10. Environments / Objects Detail report field descriptions

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

Object History Report

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

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

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

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

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

Figure 4-11. Object History report fields

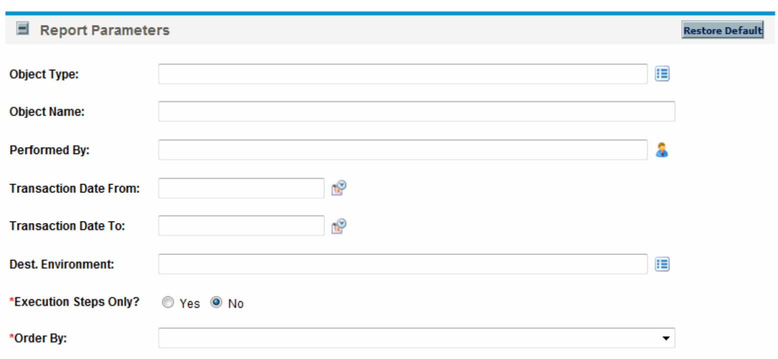


Table 4-11. Object History report field descriptions

Field Name (*Required)	Description
Object Type	Select an object type from the object types available on your PPM Center instance.
Object Name	Specify an object name. Type any alphanumeric string (up to 40 characters in length).
Performed By	Select a user from the users on your PPM Center instance.
Transaction Date From	Select the starting date. The report will include only transactions started on or after this date.
Transaction Date To	Select the ending date. The report will include only transactions started on or before this date.
Dest. Environment	Select a destination environment. Use this option to view all the deployment management activity for a specific environment for those environments available on your PPM Center instance.
*Execute Steps Only	Option to show transactions for execution type workflow steps.
*Order By	Select the sort criteria. Choices include: • **Transaction Date** • **Package Creation Date** • **Object Name**

Objects / Environments Detail Report

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

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

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

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

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

Figure 4-12. Objects / Environments Detail report fields

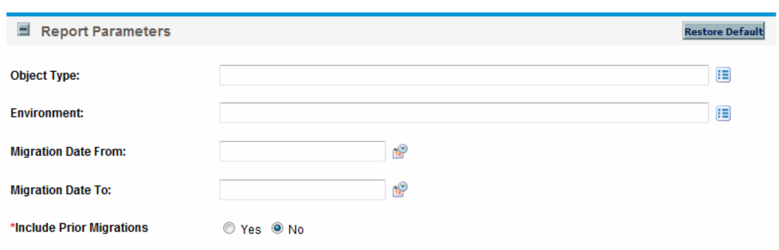


Table 4-12. Objects / Environments Detail report field descriptions

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

Package Change History Report

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

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

Figure 4-13. Package Change History report

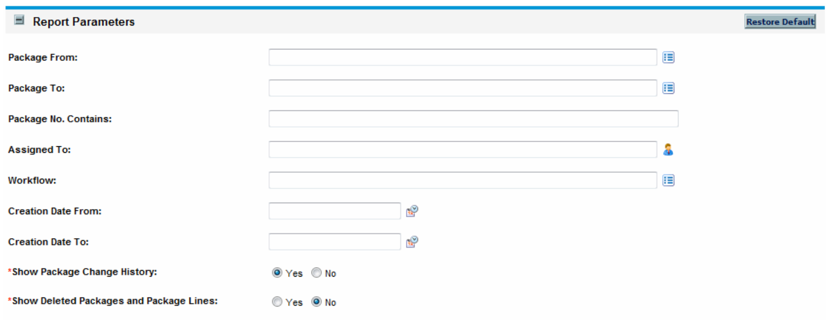


Table 4-13. Package Change History field descriptions

Field Name (*Required)	Description
Package From	Select the starting package. The report will include only packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance.
Package To	Select the ending package. The report will include only packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance.
Package No. Contains	Specify a string that must be included in the package number. Type any alphanumeric string (up to 40 characters in length).
Assigned User	Select a user from the users on your PPM Center instance.
Workflow	Select a workflow from the workflows available on your PPM Center instance.
Creation Date From	Select the starting date. The report will include only packages created on or after this date.
Creation Date To	Select the ending date. The report will include only packages created on or before this date.
*Show Package Change History	Option to show the package change history.
*Show Deleted Packages and Package Lines	Option to show deleted packages and deleted package lines.

Package Details Report

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

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

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

Figure 4-14. Package Details report fields

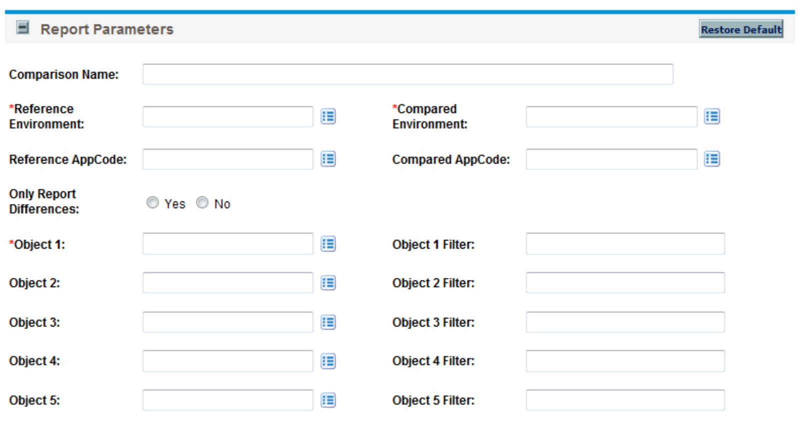


Table 4-14. Package Details report field descriptions (page 1 of 2)

Field Name (*Required)	Description
Package From	Select the starting package. The report will include only packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance.
Package To	Select the ending package. The report will include only packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance.
Package No. Contains	Specify a string that must be included in the package number. Type any alphanumeric string (up to 40 characters in length).
*Include Closed Packages	Option to include packages with an overall status of Cancelled, Closed [Success], Closed [Failure], and Closed [Mixed].
Requested By	Select a user from the users on your PPM Center instance.
*Show Line Statuses	Option to show the workflow steps and current step status for each package line.
Assigned To	Select a user from the users on your PPM Center instance.
*Show Line Parameters	Option to show all the visible parameters for each package line.
Workflow	Select a workflow from the workflows available on your PPM Center instance.
*Show Notes	Option to show the notes.
Package Group	Select a package group from the package groups available on your PPM Center instance.
*Show User Data	Option to show the user data custom fields.
Creation Date From	Select the starting date. The report will include only packages created on or after this date.
*Show Full Header	Option to show the full header.

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

Field Name (*Required)	Description
Creation Date To	Select the ending date. The report will include only packages created on or before this date.
*Show References	Option to show associated references.

Package History Report

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

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

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

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

Figure 4-15. Package History report fields

Table 4-15. Package History report field descriptions

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

Package Impact Analysis Report

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

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

  These objects might be affected by the current object changes (if these objects were once tied to the objects being changed in the same package, there is probably a relationship between the objects).
- Recent migrations for each object in the package, showing where changes to the given objects have recently been deployed.

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

Figure 4-16. Package Impact Analysis report fields

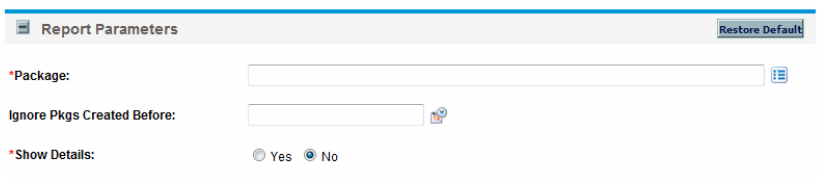


Table 4-16. Package Impact Analysis report field descriptions

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

Packages Pending Report

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

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

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

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

Figure 4-17. Packages Pending report fields

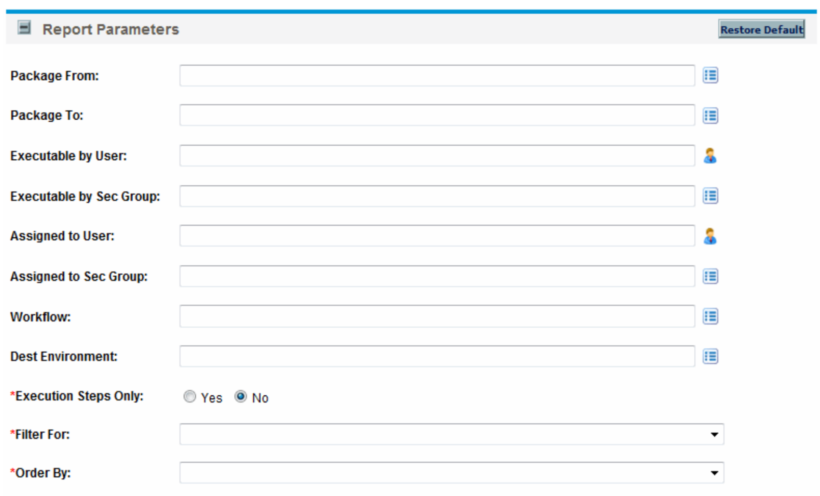


Table 4-17. Packages Pending report field descriptions (page 1 of 2)

Field Name (*Required)	Description
Package From	Select the starting date. The report will include only the packages whose names are equal to or greater than this value for those packages that are available on your PPM Center instance.
Package To	Select the ending date. The report will include only the packages whose names are equal to or less than this value for those packages that are available on your PPM Center instance.
Executable by User	Select a user from the users on your PPM Center instance.
Executable by Sec Group	Select a security group from the security groups available on your PPM Center instance.
Assigned to User	Select a user from the users on your PPM Center instance.
Assigned to Sec Group	Select a security group from the security groups available on your PPM Center instance.
Workflow	Select a workflow from the workflows available on your PPM Center instance.
Dest Environment	Use this option to determine which packages are ready to migrate to a given environment. Select a destination environment from the environments available on your PPM Center instance.
*Execution Steps Only	Option to select open package lines with an active execution type step with the given destination environment. This is useful when you want to determine which packages are ready to migrate to any environment.

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

Field Name (*Required)	Description
*Filter For	Select a filter. Choices include: • **All Active Steps** • **Eligible Steps Only** • **Scheduled Steps Only**
*Order By	Select the sort criteria. Choices include: • **Package Number** • **Step name** • **Workflow Name**

RCS Check In Report

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

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

Figure 4-18. RCS Check In report fields

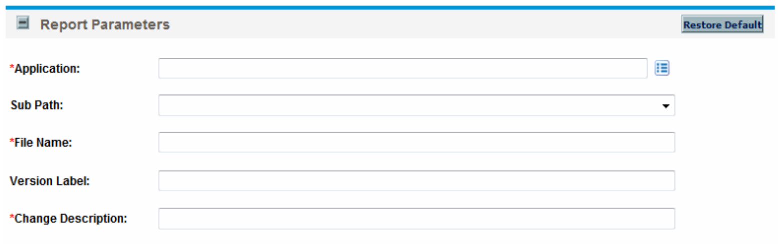


Table 4-18. RCS Check In report field descriptions

Field Name (*Required)	Description
*Application	Select an associated application from the applications available on your PPM Center instance.
Sub Path	Select a check-in path. Choices include: • **forms** • **bin** • **srw** • **scripts** • **sql** • **plsql**
*File Name	Specify the name of the file. Type any alphanumeric string (up to 40 characters in length).
Version Label	Specify the version label of the file. Type any alphanumeric string (up to 40 characters in length).
*Change Description	Specify the description of the change made to the file. Type any alphanumeric string (up to 200 characters in length).

RCS Check Out Report

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

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

Figure 4-19. RCS Check Out report fields

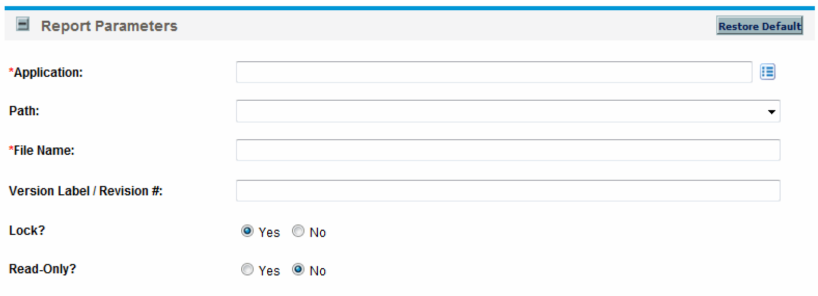


Table 4-19. RCS Check Out report field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Application	Select an associated application from the applications available on your PPM Center instance.
Path	Select a check-out path. Choices include: • **forms** • **bin** • **srw** • **scripts** • **sql** • **plsql**
*File Name	Specify the name of the file. Type any alphanumeric string (up to 40 characters in length).

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

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

Release Detail Report

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

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

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

- PFM - Finance Review Board
- PFM - IT Steering Committee
- PFM - Standards Committee
- PPM 6.0 Upgrade: Workbench Access
- PPM Administrator
- PPM All Access Grants
- PPM Billing Manager
- PPM Cost Manager
- PPM Demand Management Administrator
- PPM Demand Manager
- PPM Deployment Management Administrator
- PPM Program Manager
- PPM Project Manager
- PPM Resource Manager
- PPM Service Security Group
- PPM Team Manager
- PPM Time Administrator
- PPM Time Manager
- PPM User
- PPM User Admin

Figure 4-20. Release Detail report fields

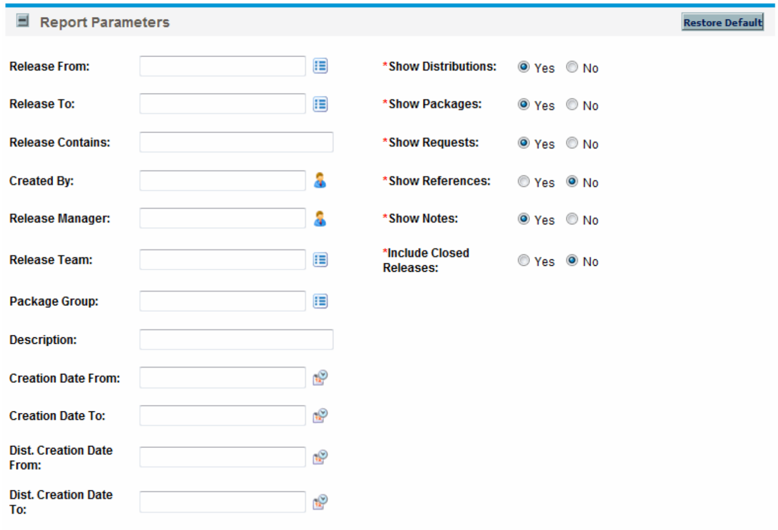


Table 4-20. Release Detail report field descriptions (page 1 of 2)

Field Name (*Required)	Description
Release From	Select the starting date. The report will include only releases whose names are equal to or greater than this value for those releases that are available on your PPM Center instance.
*Show Distributions	Option to show distributions.
Release To	Select the ending date. The report will include only releases whose names are equal to or less than this value for those releases that are available on your PPM Center instance.
*Show Packages	Option to show packages.
Release Contains	Select a release number. Type any alphanumeric string (up to 40 characters in length).
*Show Requests	Option to show requests.
Created By	Select a user from the users on your PPM Center instance.
*Show References	Option to show references.

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

Field Name (*Required)	Description
Release Manager	Select a release manager from the users on your PPM Center instance.
*Show Notes	Option to show notes.
Release Team	Select a release team from the release teams available on your PPM Center instance.
*Include Closed Releases	Option to show closed releases.
Package Group	Select a package group from the package groups available on your PPM Center instance.
Description	Specify a string that must be included in the description. Type any alphanumeric string (up to 200 characters in length).
Creation Date From	Select the starting date. The report will include only releases created on or after this date.
Creation Date To	Select the ending date. The report will include only releases created on or before this date.
Dist. Creation Date From	Select the starting date. The report will include only distributions created on or after this date.
Dist. Creation Date To	Select the ending date. The report will include only distributions created on or before this date.

Release Notes Report

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

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

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

Figure 4-21. Release Notes report fields

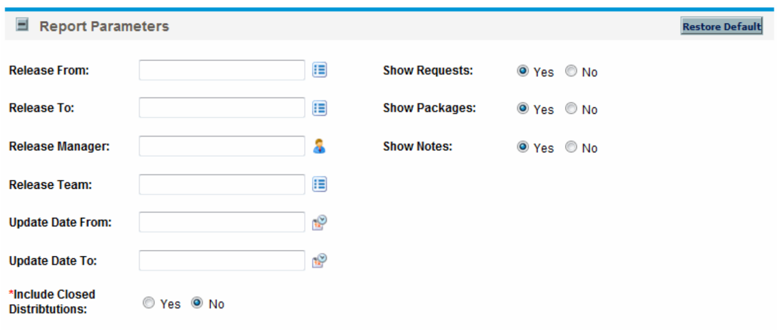


Table 4-21. Release Notes report field descriptions

Field Name (*Required)	Description
Release From	Select the starting release. The report will include only releases whose names are equal to or greater than this value for those releases that are available on your PPM Center instance.
Show Requests	Option to show requests.
Release To	Select the ending release. The report will include only releases whose names are equal to or less than this value for those releases that are available on your PPM Center instance.
Show Packages	Option to show packages.
Release Manager	Select a release manager from the users on your PPM Center instance.
Show Notes	Option to show notes.
Release Team	Select a release team from the release teams available on your PPM Center instance.
Update Date From	Select the starting date. The report will include only releases updated on or after this date.
Update Date To	Select the ending date. The report will include only releases updated on or before this date.
*Include Closed Distribtutions	Option to show closed distributions.

5 Demand Management Reports

ALM - Change Summary Report

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

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

Figure 5-1. ALM - Change Summary report fields

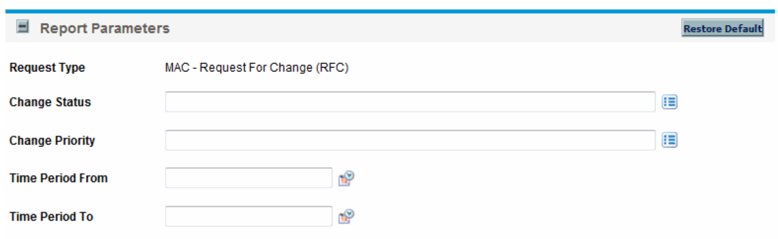


Table 5-1. ALM - Change Summary report field descriptions

Field Name	Description
Request Type	Request type to filter on
Change Status	Status of the change request
Change Priority	Priority of the change request
Time Period From	Earliest date the RFCs were created
Time Period To	Latest date the RFCs were created

ALM - Forward Schedule of Changes for RFC Report

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

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

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

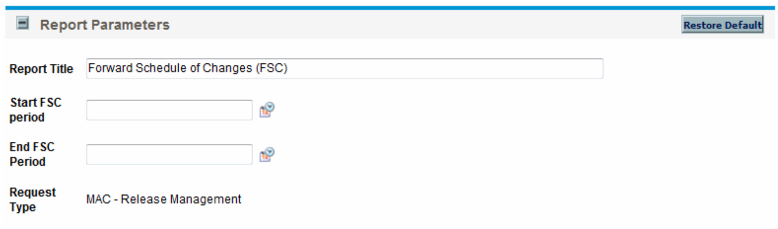


Table 5-2. ALM - Forward Schedule of Changes for RFC report field descriptions

Field Name	Description
Report Title	Title of the report
Start FSC Period	Earliest start date of the scheduled RFCs
End FSC Period	Latest start date of the scheduled RFCs
Request Type	Request type to filter on

ALM - Forward Schedule of Releases Report

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

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

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

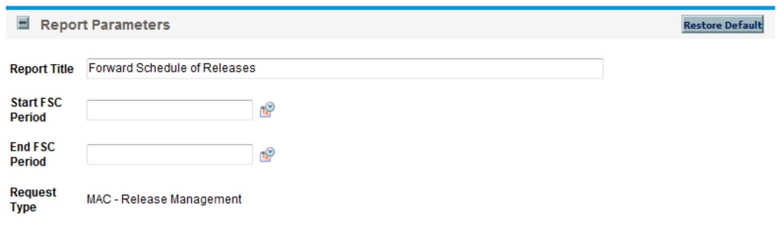


Table 5-3. ALM - Forward Schedule of Releases report field descriptions

Field Name	Description
Report Title	Title of the report
Start FSC Period	Searches for releases created after the specified FSC date
End FSC Period	Searches for releases created before the specified FSC date
Request Type	Request type to filter on

ALM - Release Content Report

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

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

Figure 5-4. ALM - Release Content report fields

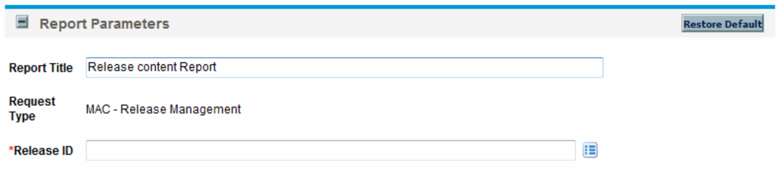


Table 5-4. ALM - Release Content report field descriptions

Field Name	Description
Report Title	Title of the report
Request Type	Request type to filter on
*Release ID	Specify the release whose contents you want to list

ALM - Release Summary Report

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

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

Figure 5-5. ALM - Release Summary report fields

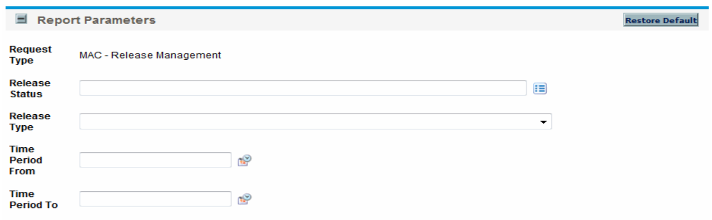


Table 5-5. ALM - Release Summary report field descriptions

Field Name	Description
Request Type	Request type to filter on
Release Status	Searches for releases with the specified statuses
Release Type	Searches for releases of a specific type
Time Period From	Searches for releases created after the specified date
Time Period To	Searches for releases created before the specified date

Contact Detail Report

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

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

Figure 5-6. Contact Detail report fields

Table 5-6. Contact Detail report field descriptions

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

Demand Creation History Report

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

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

Figure 5-7. Demand Creation History report fields

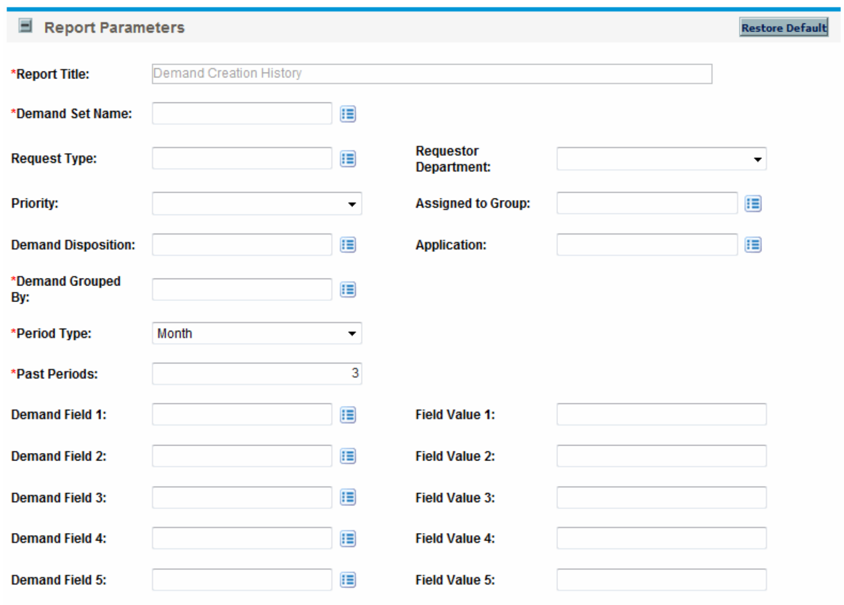


Table 5-7. Demand Creation History report field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
*Demand Set Name	Select a demand set from the demand sets available on your PPM Center instance.
Request Type	Select one or more request types from the request types available on your PPM Center instance.
Requestor Department	Select a department from the departments available on your PPM Center instance.
Priority	Select a priority. Choices include: • **Low** • **Normal** • **High** • **Critical**
Assigned to Group	Select one or more security groups from the security groups available on your PPM Center instance.
Demand Disposition	Select one or more dispositions. Choices include: • **Satisfied** • **Backlog** • **New** • **Scheduled** • **Rejected**
Application	Select one or more applications from the applications available on your PPM Center instance.
*Demand Grouped By	The report will include only the demand set grouped by this demand field. Choices are limited to demand fields available on your PPM Center instance.
*Period Type	Select a time period. Choices include: • **Months** • **Weeks**

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

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

Historical SLA Violations Report

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

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

Figure 5-8. Historical SLA Violations report fields

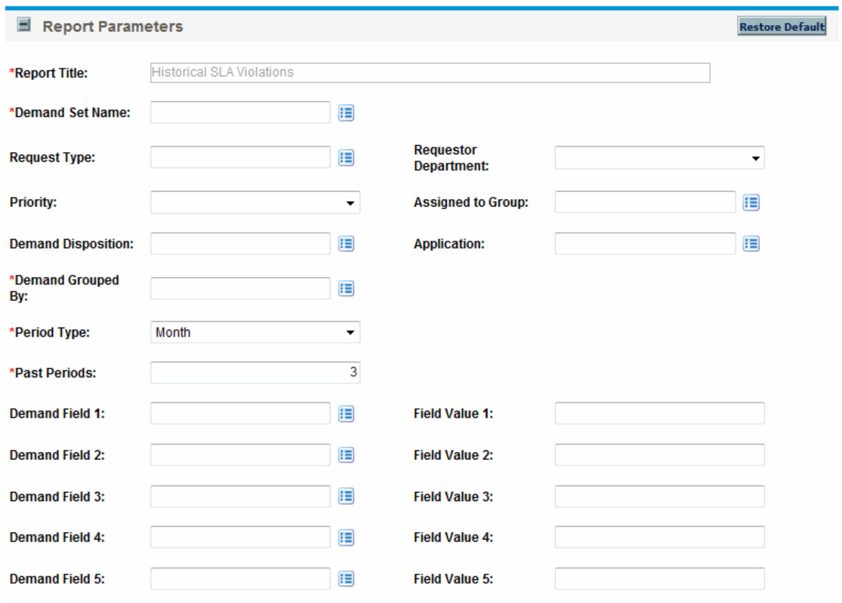


Table 5-8. Historical SLA Violations report field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
*Demand Set Name	Select a demand set from the demand sets available on your PPM Center instance.
Request Type	Select one or more request types from the request types available on your PPM Center instance.
Requestor Department	Select a department from the departments available at your site.
Priority	Select one or more priorities. Choices include: • **Low** • **Normal** • **High** • **Critical**
Assigned to Group	Select one or more security groups from the security groups available on your PPM Center instance.
Demand Disposition	Select one or more dispositions. Choices include: • **Satisfied** • **Backlog** • **New** • **Scheduled** • **Rejected**
Application	Select one or more applications from the applications available on your PPM Center instance.
*Demand Grouped By	Select a demand set grouping. Choices are limited to demand fields available on your PPM Center instance.
*Period Type	Select a time period. Choices include: • **Months** • **Weeks**

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

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

Request Detail (Filter by Custom Fields) Report

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

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

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

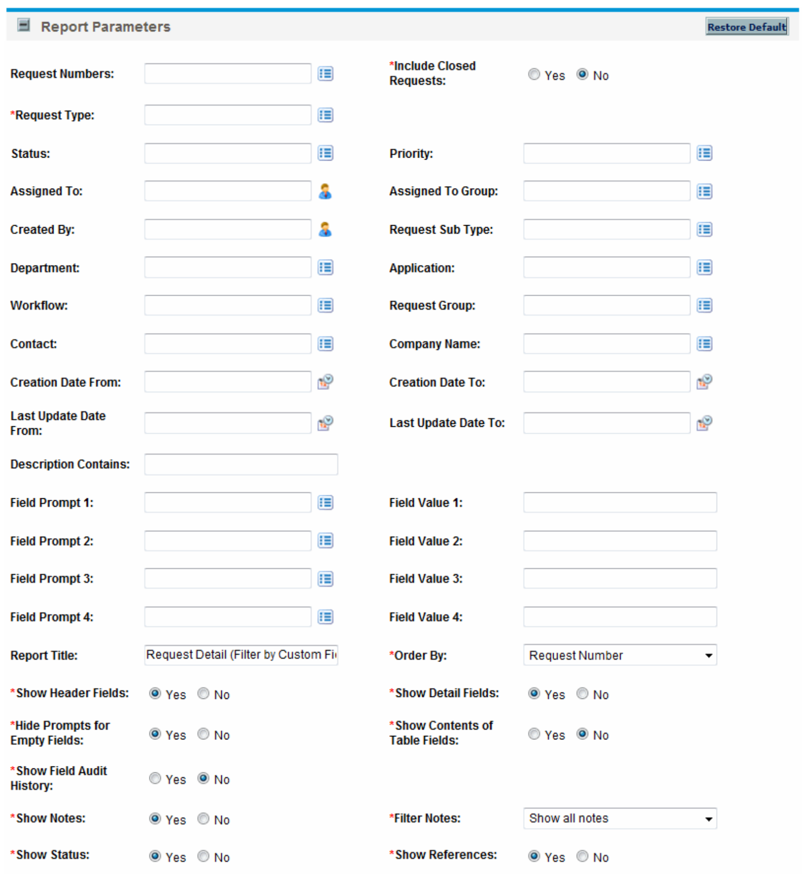


Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions (page 1 of 3)

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

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

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

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

Field Name (*Required)	Description
*Order By	Select the sort criteria. Choices include: • **Request Number** • **Application** • **Assigned To** • **Created By** • **Creation Date** • **Department** • **Last Updated Date** • **Priority** • **Request Group** • **Request Sub Type** • **Request Type** • **Status**
*Show Header Fields	Option to show header fields.
*Show Detail Fields	Option to show details (custom fields).
*Hide Prompts For Empty Fields	Option to hide prompts for empty fields.
*Show Contents of Table Fields	Option to show the contents of table component fields.
*Show Field Audit History	Option to show the transaction history.
*Show Notes	Option to show notes.
*Filter Notes	Indicate the scope of the notes. Choices include: • **Show all notes** • **Show only user notes**
*Show Status	Option to show workflow steps and their current status.
*Show References	Option to show references.

Request Detail Report

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

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

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

Figure 5-10. Request Detail report fields

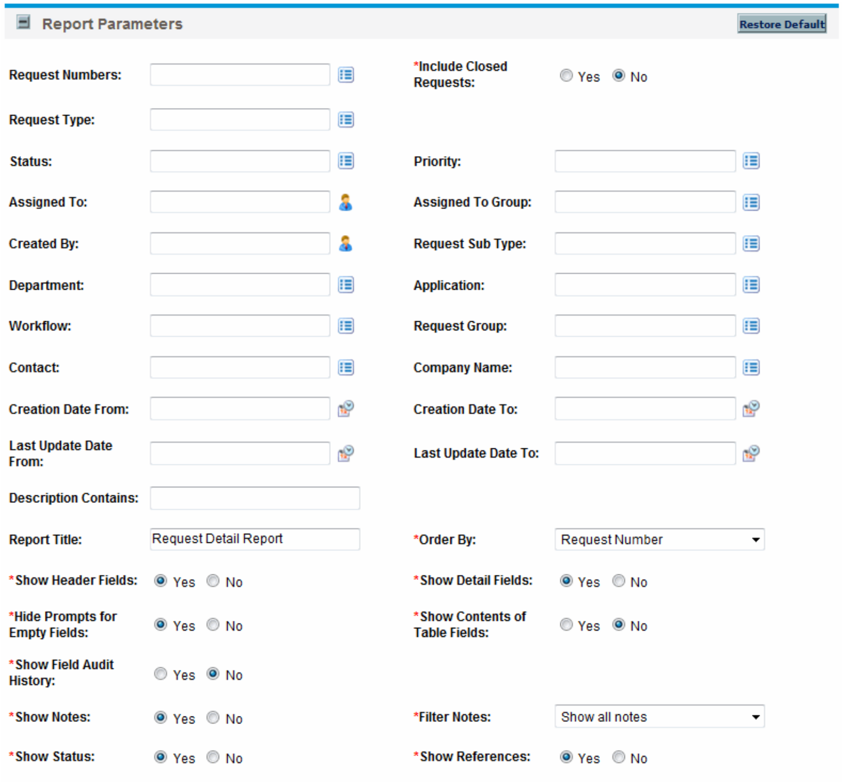


Table 5-10. Request Detail report field descriptions (page 1 of 3)

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

Table 5-10. Request Detail report field descriptions (page 2 of 3)

Field Name (*Required)	Description
Contact	Select one or more contacts from the contacts available on your PPM Center instance.
Company Name	Select one or more companies from the companies available on your PPM Center instance.
Creation Date From	Select the starting date. The report will include only those requests created on or after this date.
Creation Date To	Select the ending date. The report will include only those requests created
Last Update Date From	Select the starting date. The report will include only those requests updated on or after this date.
Last Update Date To	Select the ending date. The report will include only requests updated on or before this date.
Description Contains	Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length).
Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
*Order By	Select the sort criteria. Choices include: • **Request Number** • **Application** • **Assigned To** • **Created By** • **Creation Date** • **Department** • **Last Updated Date** • **Priority** • **Request Group** • **Request Sub Type** • **Request Type** • **Status**

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

Field Name (*Required)	Description
*Show Header Fields	Option to show the header field
*Show Detail Fields	Option to show details (custom fields).
*Hide Prompts for Empty Fields	Option to hide the prompts for empty fields.
*Show Contents of Table Fields	Option to show the contents of table component fields.
*Show Field Audit History	Option to show the transaction history.
*Show Notes	Option to show notes.
*Filter Notes	Indicates the scope of the notes to show. Choices include: • **Show all notes** • **Show only user notes**
*Show Status	Option to show workflow steps and their current status.
*Show References	Option to show references.

Request History Report

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

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

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

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

Figure 5-11. Request History report fields

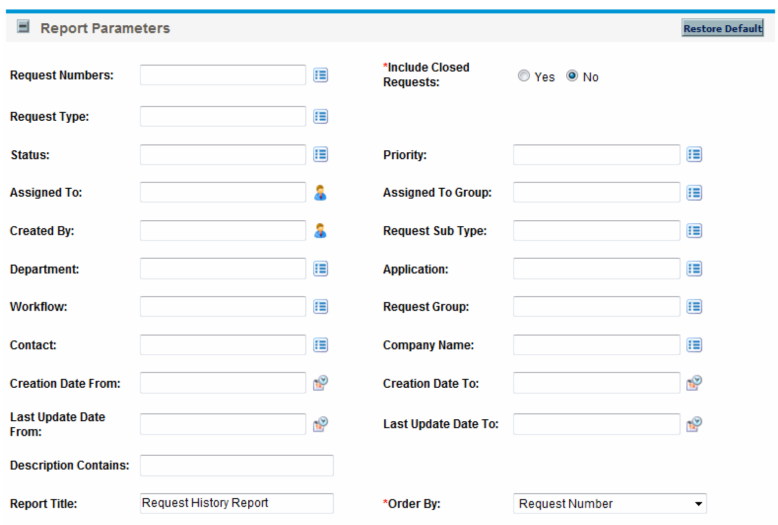


Table 5-11. Request History report field descriptions (page 1 of 2)

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

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

Field Name (*Required)	Description
Company Name	Select one or more companies from the companies available on your PPM Center instance.
Creation Date From	Select the starting date. The report will include only those requests created on or after this date.
Creation Date To	Select the ending date. The report will include only those requests created on or before this date.
Last Update Date From	Select the starting date. The report will include only requests those updated on or after this date.
Last Update Date To	Select the ending date. The report will include only those requests updated on or before this date.
Description Contains	Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length).
Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
*Order By	Select the sort criteria. Choices include: • **Application** • **Assigned To** • **Created By** • **Creation Date** • **Department** • **Last Updated Date** • **Priority** • **Request Group** • **Request Number** • **Request Type** • **Request Sub Type** • **Status**

Request Quick View Report

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

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

Figure 5-12. Request Quick View report fields

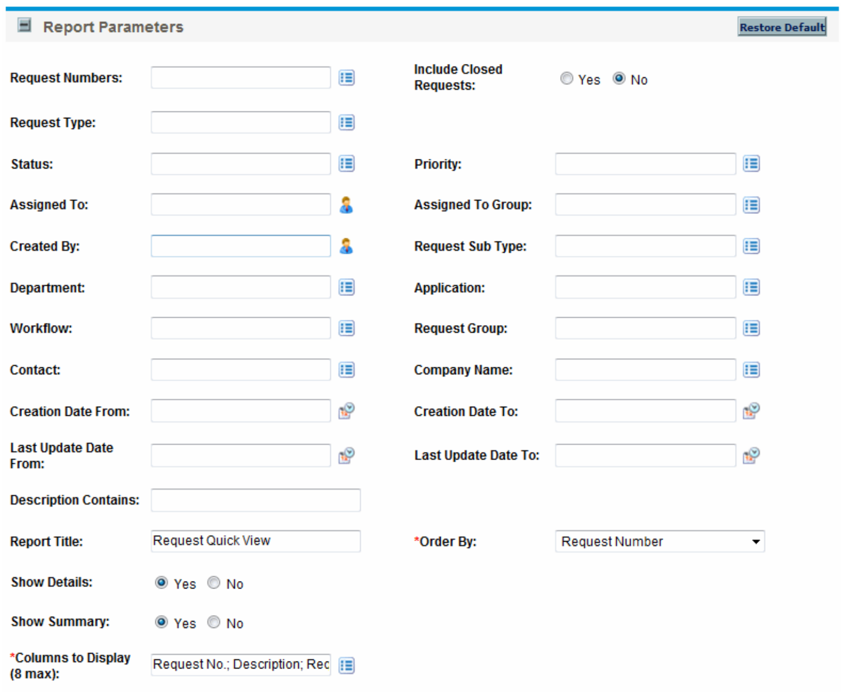


Table 5-12. Request Quick View report field descriptions (page 1 of 2)

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

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

Field Name (*Required)	Description
Company Name	Select one or more companies from the companies available on your PPM Center instance.
Creation Date From	Select the starting date. The report will include only those requests created on or after this date.
Creation Date To	Select the ending date. The report will include only those requests created on or before this date.
Last Update Date From	Select the starting date. The report will include only those requests updated on or after this date.
Last Update Date To	Select the ending date. The report will include only those requests updated on or before this date.
Description Contains	Specify the string that must be included in the description. Type any alphanumeric string (up to 200 characters in length).
Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
*Order By	Select the sort criteria: Choices include: • **Request Number** • **Created By** • **Creation Date** • **Priority** • **Request Type** • **Status** • **Description** • **Assigned User**
*Show Details	Option to show details.
Show Summary	Option to show the summary.
*Columns to Display (8 max)	Select one to eight columns of information from those columns available on your PPM Center instance.

Request Summary (Filter by Custom Fields) Report

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

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

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

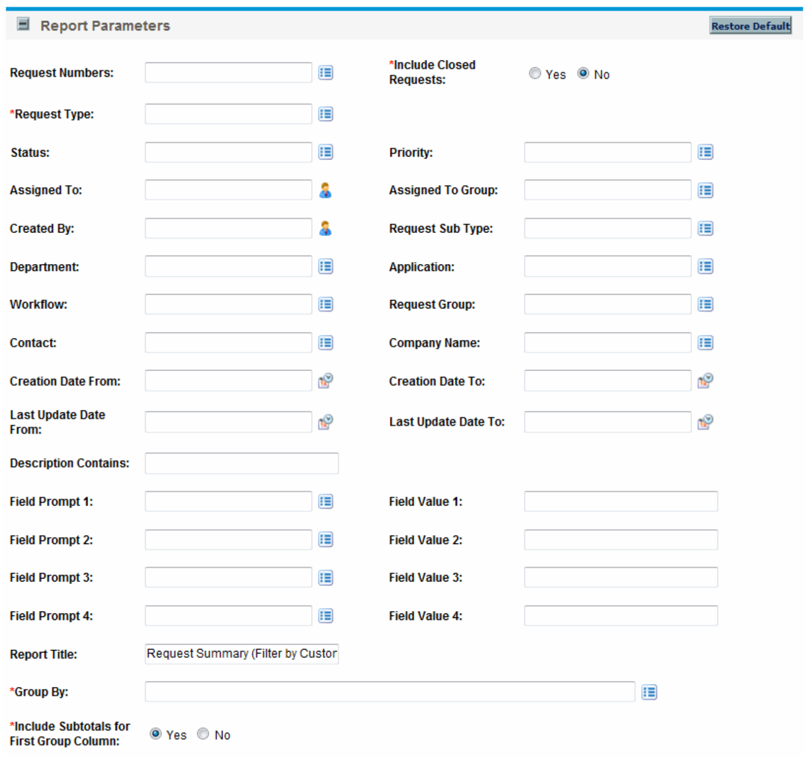


Table 5-13. Request Summary (Filter by Custom Fields) report field descriptions (page 1 of 3)

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

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

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

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

Field Name (*Required)	Description
*Group By	Select one or more sort criteria. Choices include: • **Assigned Group** • **Assigned User** • **Company Name** • **Contact Email** • **Contact Name** • **Contact Phone** • **Created By** • **Created On** • **Department** • **Description** • **Last Updated On** • **Application** • **Priority** • **Request Group** • **Request Number** • **Request Sub Type** • **Request Type** • **Status** • **Days Open** • **Workflow** • **Percent Complete**
*Include Subtotals for First Group Column	Option to include subtotals for the first group.

Request Summary Report

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

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

Figure 5-14. Request Summary report fields

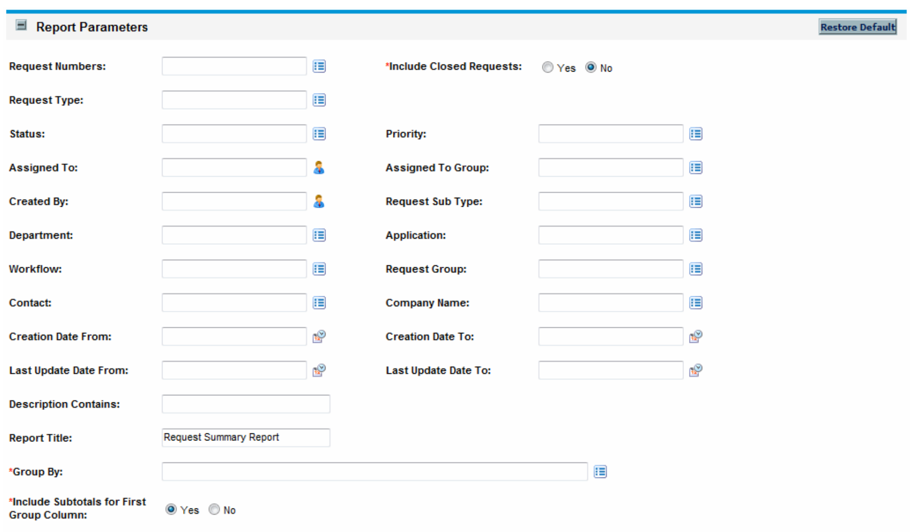


Table 5-14. Request Summary report field descriptions (page 1 of 3)

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

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

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

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

Field Name (*Required)	Description
*Group By	Select one or more sort criteria. Choices include: • **Assigned Group** • **Assigned User** • **Company Name** • **Contact Email** • **Contact Name** • **Contact Phone** • **Created By** • **Created On** • **Department** • **Description** • **Last Updated On** • **Application** • **Priority** • **Request Group** • **Request Number** • **Request Sub Type** • **Request Type** • **Status** • **Days Open** • **Workflow** • **Percent Complete**
*Include Subtotals for First Group Column	Option to include subtotals for the first group.

Satisfied Demand History Report

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

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

Figure 5-15. Satisfied Demand History report fields

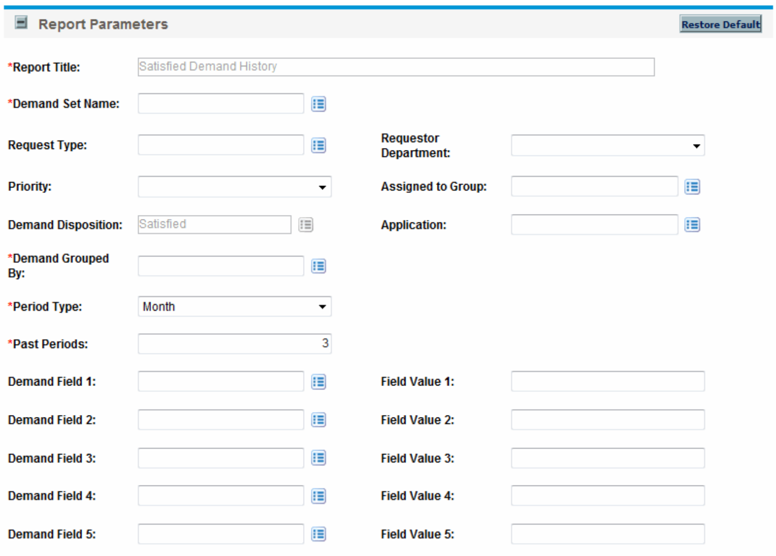


Table 5-15. Satisfied Demand History report field descriptions (page 1 of 2)

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

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

Field Name (*Required)	Description
Priority	Select one or more priorities. Choices include: • **Low** • **Normal** • **High** • **Critical**
Assigned to Group	Select one or more security groups from the security groups available on your PPM Center instance.
Demand Disposition	Read-only field.
Application	Select one or more applications from the applications available on your PPM Center instance.
Demand Grouped By	Select a demand set grouping from those demand fields available on your PPM Center instance.
Period Type	Specify the time period. Choices include: • **Months** • **Weeks**
Past Periods	Specify the number of historic periods of **Period Type.** Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator).
Demand Field 1–5	Select these demand fields from those demand fields available on your PPM Center instance.
Field Value 1–5	Select these corresponding demand field values. Type any alphanumeric string (up to 40 characters in length). This value should exactly match the visible field. For Yes/No options, type `Y` for yes and `N` for no.

6 Project Management Reports

Baseline Comparison Report

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

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

Figure 6-1. Baseline Comparison report fields

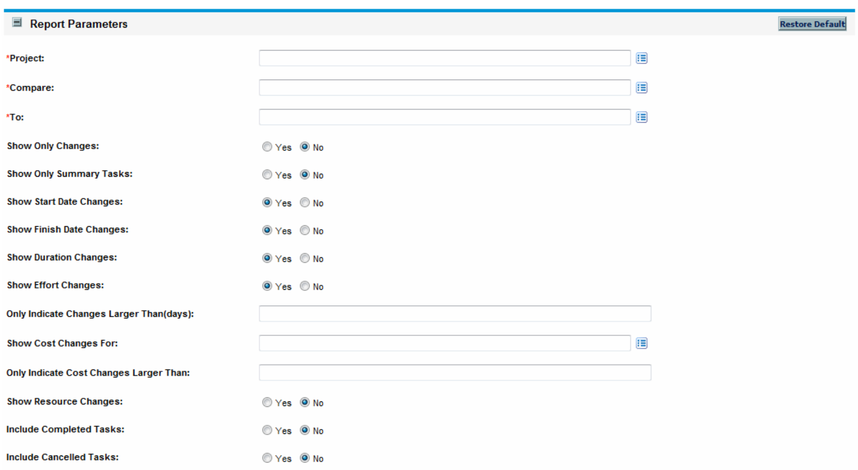


Table 6-1. Baseline Comparison report field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Project	Select a project from the projects available on your PPM Center instance.
*Compare	Select a baseline or work plan for this project from those work plans or baselines available on your PPM Center instance.
*To	Select another baseline or work plan for this project from the projects or baselines available on your PPM Center instance.
Show Only Changes	Option to show changes only. Use this when you want to view only the differences between the entities.
Show Only Summary Tasks	Option to show summary tasks only.
Show Start Date Changes	Option to show changes in task start dates.
Show Finish Date Changes	Option to show changes in task finish dates.
Show Duration Changes	Option to show changes in task durations.
Show Effort Changes	Option to show changes in task effort.
Only Indicate Changes Later Than(days)	Specify the number of days that should be ignored. That is, changes smaller than the specified amount will not be shown. Type any integer (in the range of –999 to 9,999 and without a comma separator).
Show Cost Changes For	Select one or more cost categories. Choices include: • **Planned Labor** • **Planned Non-Labor** • **Planned Cost** • **Planned Capital Cost** • **Planned Operating Cost**
Only Indicate Cost Changes Larger Than	Specify the minimum cost changes to report upon. Type any integer (in the range of –999 to 9,9999 and without a comma separator).
Show Resource Changes	Option to compare tasks having resource changes.

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

Field Name (*Required)	Description
Include Completed Tasks	Option to compare tasks having Completed status.
Include Cancelled Tasks	Option to compare tasks having Cancelled status.

Project Cost Breakdown Report

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

This report also appears in the Financial Management category.

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

Figure 6-2. Project Cost Breakdown report fields

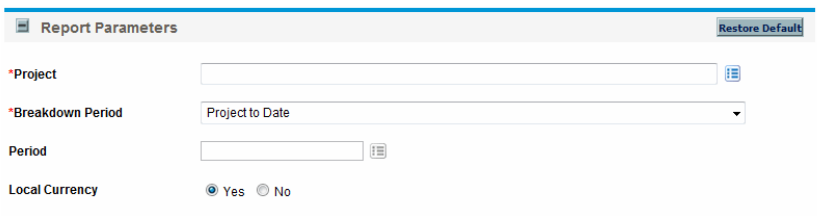


Table 6-2. Project Cost Breakdown report field descriptions

Field Name (*Required)	Description
*Project	Select one or more projects from the projects available on your PPM Center instance.
*Breakdown Period	Select a breakdown period. Choices include: • **Project to Date.** Costs are displayed for the entire project(s). • **Month.** Costs are displayed for month and year specified in **Period.**
Period	If reporting on costs for a specific month, select the month and year from those periods available on your PPM Center instance.
Local Currency	Option to select if the costs should be displayed in local currency or in the PPM Center system base currency.

Project Cost Details Report

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

This report also appears in the Financial Management category.

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

Figure 6-3. Project Cost Details report fields

Table 6-3. Project Cost Details report field descriptions

Field Name	Description
Project Name	Specify one or more projects from the projects available on your PPM Center instance.
Project Manager	This will limit the report results to only the selected project managers. Select one or more project managers from the users available on your PPM Center instance.
Limit Hierarchy Depth to	Specify the level of cost details to show. Type any integer (in the range of 0 to 999,999,999 and without a comma separator). Realistically, however, the range should be from 1 to 10. A depth of `1` will show costs at the work plan level.
Group costs by Capital and Operating	Option to select if the costs should be grouped as capital and operating. Choices include: • **Yes.** Costs are grouped as capital or operating. • **No.** Costs are grouped as labor and non-labor.
Local Currency	Option to select if the costs should be displayed in local currency or in the PPM Center system base currency. Choices include: • **Yes.** Costs are displayed in local currency. • **No.** Costs are displayed in the PPM Center system base currency.

7 Time Management Reports

Actual Time Summary Report

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

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

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

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

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

Figure 7-1. Actual Time Summary report fields

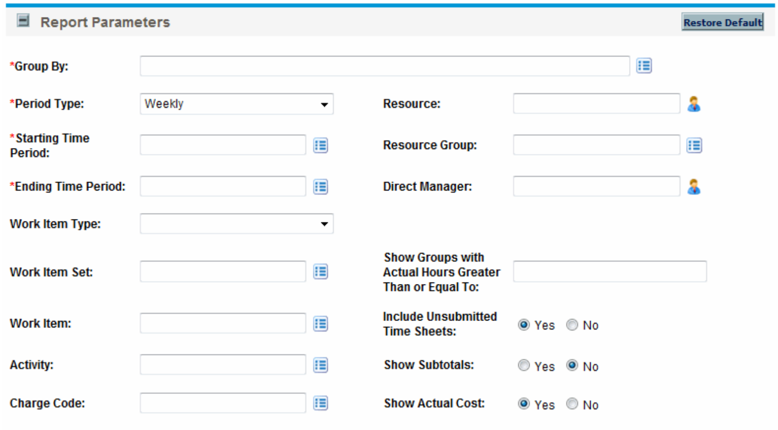


Table 7-1. Actual Time Summary report field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Group By	Select one or more grouping criteria. Choices include: • **Work Item Type** • **Work Item Set** • **Work Item** • **Activity** • **Resource** • **Time Period** • **Charge Code** • **Time Sheet #**
*Period Type	Select a period type from the period types available on your PPM Center instance.
*Starting Time Period	Select the starting date from those date ranges available on your PPM Center instance.
Resource	Select one or more resources from the resources available on your PPM Center instance.
*Ending Time Period	Select the ending date from those date ranges available on your PPM Center instance.

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

Field Name (*Required)	Description
Resource Group	Select one or more resource groups from the resource groups available on your PPM Center instance.
Work Item Type	Select a work item type. Choices include: • **Request** • **Package** • **Task** • **Misc**
Work Item Set	Select a work item set from the work item sets available on your PPM Center instance.
Show Groups with Actual Hours Greater Than or Equal To	Specify the minimum total actual hours of a group, where the grouping is specified in the Group By field. Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator). This allows you to filter for the areas with large time charges.
Work Item	Select a work item from the work items available on your PPM Center instance.
Include Unsubmitted Time Sheets	Option for whether unsubmitted time sheets should be shown.
Activity	Select an activity from the activities available on your PPM Center instance.
Show Subtotals	Option for whether subtotals should be shown.
Charge Code	Select a charge code from the charge codes available on your PPM Center instance.
Show Actual Cost	Option for whether actual costs should be shown.

Delinquent Time Sheets Report

This report list the time sheets that are delinquent.

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

Figure 7-2. Delinquent Time Sheets report fields

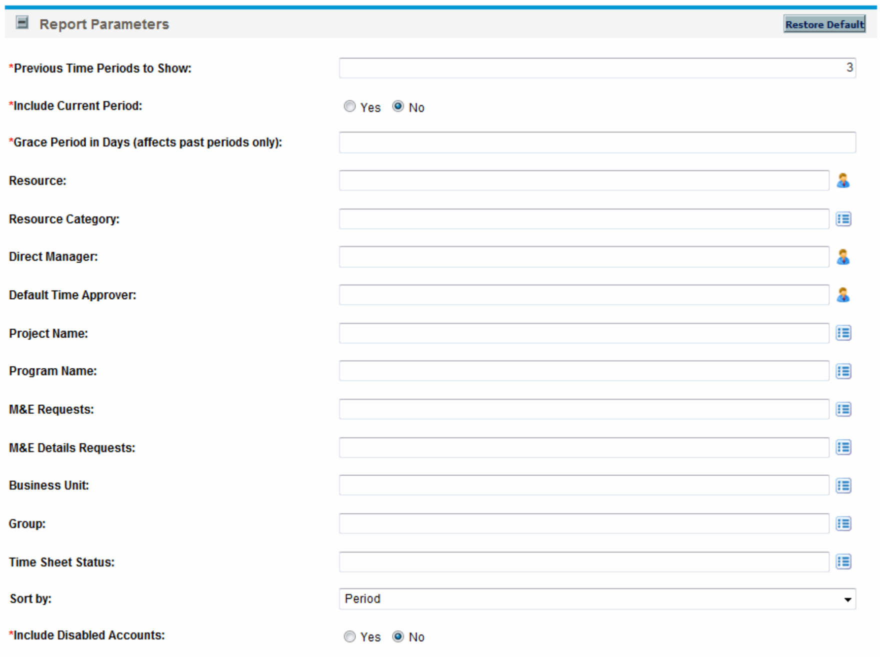


Table 7-2. Delinquent Time Sheets report field descriptions

Field Name (*Required)	Description
*Previous Time Periods to Show	Specify the number of previous time periods to show. Type any numeric value between 0 and 12. The default is 3.
*Include Current Period	Option to include the current time period.
*Grace Period in Days (affects past periods only)	Specify the number of days to include in the grace period. Type any numeric value between 0 and 31.
Resource	Select one or more resources from the resources available on your PPM Center instance.
Direct Manager	Select a manager from the managerial resources available on your PPM Center instance.
Default Time Approver	Select a time approver from the time approvers available on your PPM Center instance.
Organization Unit	Select an organization from the organizations available on your PPM Center instance.
Time Sheet Status	Select a status from the statuses available on your PPM Center instance.
Sort by	Select the sort criteria. Choices include: • **Resource** • **Period Name**
Include Children Organization Units	Option to include delinquent time sheets of the children of the selected Organization Unit.

Time Sheet Details Report

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

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

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

Figure 7-3. Time Sheet Details report fields

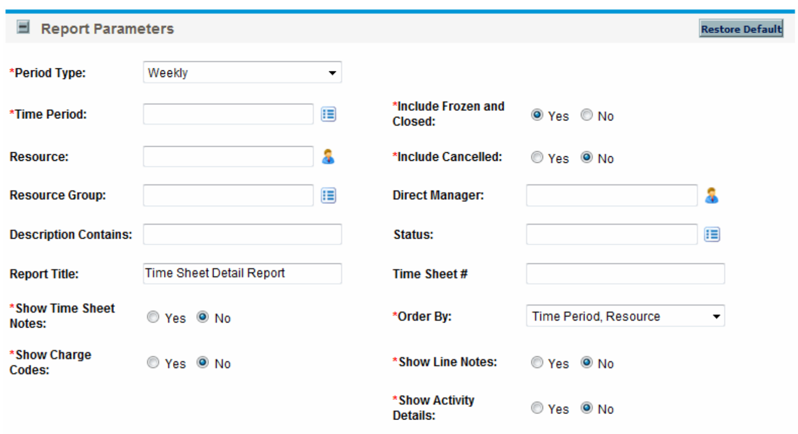


Table 7-3. Time Sheet Details report field descriptions

Field Name (*Required)	Description
*Period Type	Select a period type from the period types available on your PPM Center instance.
*Time Period	Select a time period from the time periods available on your PPM Center instance.
Include Frozen and Closed	Option to include frozen and closed time sheets.
Resource	Select one or more resources from the resources available on your PPM Center instance.
Include Cancelled	Option to include cancelled time sheets.
Resource Group	Select one or more resource groups from the resource groups available on your PPM Center instance.
Status	Select a status from the statuses available on your PPM Center instance.
Description Contains	Specify a description filter. Type any alphanumeric string (up to 200 characters in length).
Time Sheet #	Specify a time sheet number. Type any numeric value (between 0 and 999,999,999 and without a comma separator).
Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).
Order By	Select the sort criteria. Choices include: • **Time Period,** followed by **Resource** • **Resource,** followed by **Time Period**
Show Time Sheet Notes	Option to show the header notes.
Show Line Notes	Option to show the notes attached to each time sheet line.
Show Charge Codes	Option to show the charge codes.
Show Activity Details	Option to show activity details.

Only the following users can view the detailed work item information in the Time Sheet Details report:

- The resource of the time sheet
- The resource's direct manager
- The time sheet line approver
- The time sheet billing approver
- The delegate of one of the users above

The delegate's delegate or the manager's manager cannot view the detailed work item information in the report.

Time Sheet Summary Report

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

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

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

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

Figure 7-4. Time Sheet Summary report fields

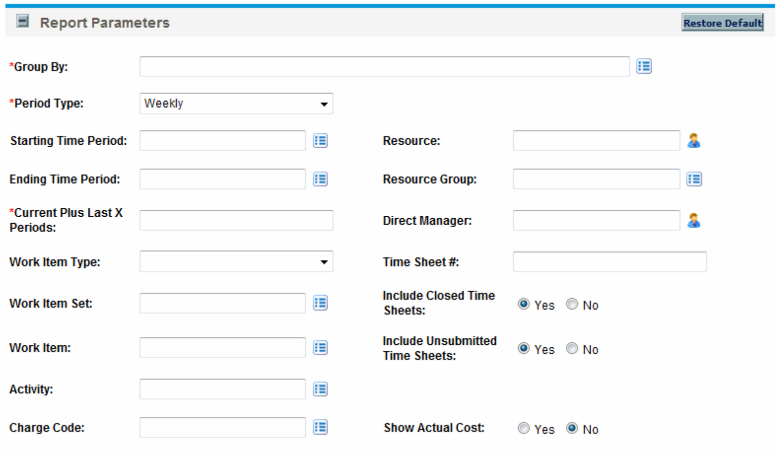


Table 7-4. Time Sheet Summary report field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Group By	Select one or more grouping criteria. Choices include: • **Work Item Type** • **Work Item Set** • **Work Item** • **Activity** • **Resource** • **Time Period** • **Time Sheet #** • **Time Sheet Status**
*Period Type	Select a period type from the period types available on your PPM Center instance.
Starting Time Period	Select the starting date from those date ranges available on your PPM Center instance.
Resource	Select one or more resources from the resources available on your PPM Center instance.
Ending Time Period	Select the ending date from those date ranges available on your PPM Center instance.

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

Field Name (*Required)	Description
Resource Group	Select one or more resource groups from the resource groups available on your PPM Center instance.
Current Plus Last <*X*> Periods	Specify the number of previous periods to include. Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator).
Work Item Type	Select a work item type. Choices include: • **Request** • **Package** • **Task** • **Misc**
Time Sheet #	Specify a time sheet number. Type any numeric value (between -999,999,999 and 999,999,999 and without a comma separator).
Work Item Set	Select a work item set from the work item sets available on your PPM Center instance.
Include Closed Time Sheets	Option to include closed time sheets.
Work Item	Displays time sheets for a given set of work items (package, request, project, or task).
Include Unsubmitted Time Sheets	Option to include unsubmitted time sheets.
Activity	Select an activity from the activities available on your PPM Center instance.
Charge Code	Select a charge code from the charge codes available on your PPM Center instance.

Work Allocation Details Report

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

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

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

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

This report also appears in the Resource Management category.

Figure 7-5. Work Allocation Details report fields

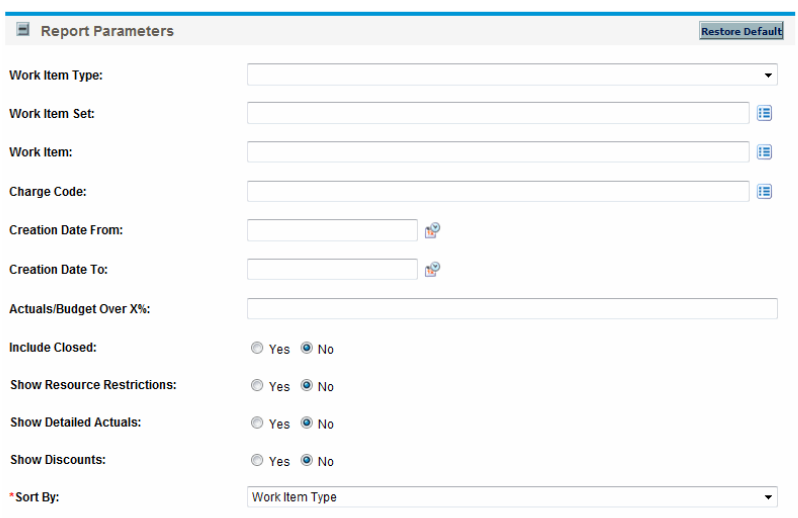


Table 7-5. Work Allocation Details report field descriptions (page 1 of 2)

Field Name (*Required)	Description
Work Item Type	Select a work item type. Choices include: • **Request** • **Package** • **Task** • **Misc**
Work Item Set	Select a work item set from the work item sets available on your PPM Center instance.
Work Item	Specify a work item from the work items available on your PPM Center instance.
Charge Code	Select a charge code from the charge codes available on your PPM Center instance.
Creation Date From	Select the starting creation date. The report will include only work allocations created on or after this date.
Creation Date To	Select the ending creation date. The report will include only work allocations created on or before this date.
Actuals/Budget Over <*X*>%	Specify the minimum percentage for which you want to show work allocations with the actuals are close to (or over) budget.
Include Closed	Option to include closed work allocations.
Show Resource Restrictions	Option to include restricted resources and resource groups.
Show Detailed Actuals	Option to include the total actuals to date for the work allocation, as well as the breakdown of the actuals provided by each resource.

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

Field Name (*Required)	Description
Show Discounts	Option to include the standard and billing discounts.
*Sort By	Select the sort criteria. Choices include: • **Work Item Type** • **Work Item Set** • **Work Item** • **Original Budget (Hrs)** • **Current Budget (Hrs)**

8 Report Types

Overview of the Report Type Workbench

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

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

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

Using the Report Type Workbench

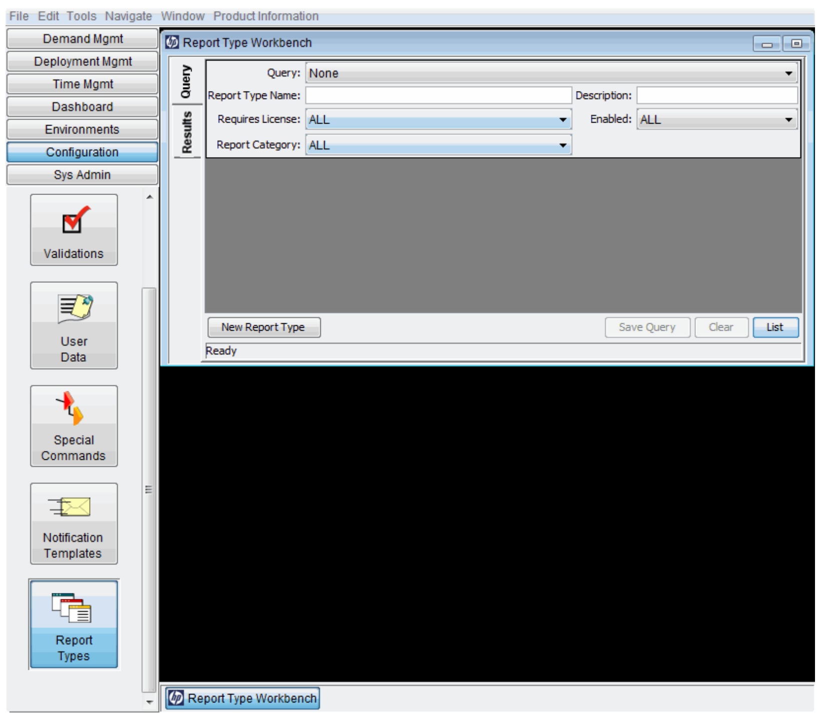
Logging On

To access the Report Type Workbench:

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

   The PPM Workbench opens.
3. From the shortcut bar, select **Configuration > Report Types.**

   The Report Type Workbench opens.

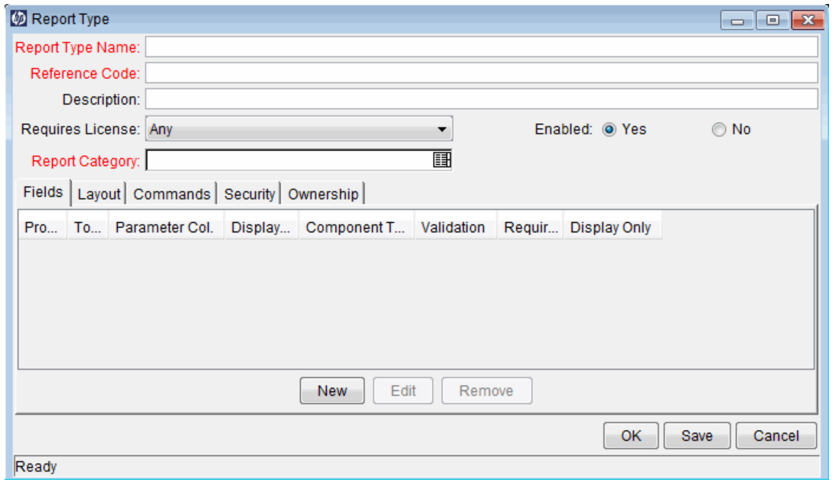


Creating an Entirely New Report Type

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

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

   The Report Type window opens.

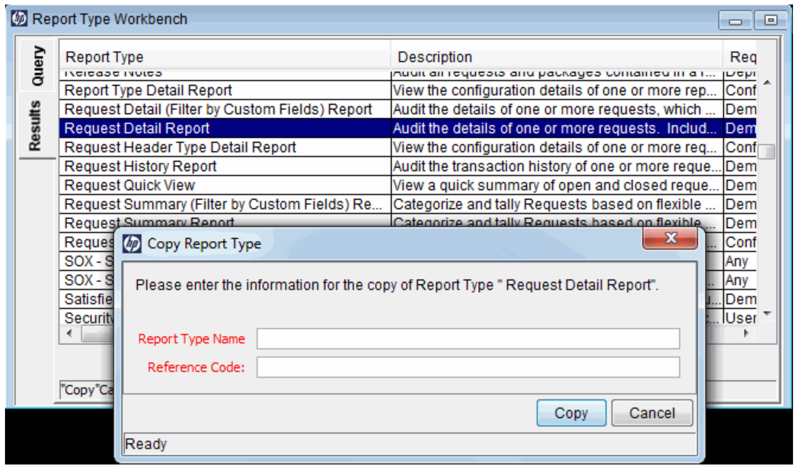
2. Configure the settings using the information provided in *Report Type Windows* on page 176.

Creating a New Report Type From an Existing Report Type

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

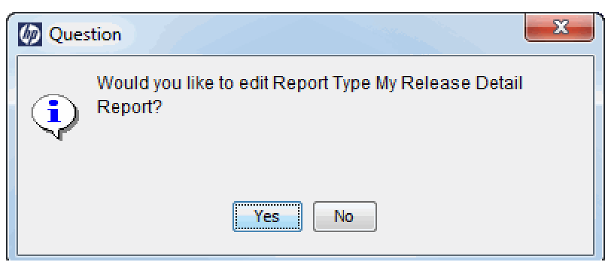
1. From the Report Type Workbench, select the existing report type.
2. Click **Copy.**

   The Copy Report Type window opens.



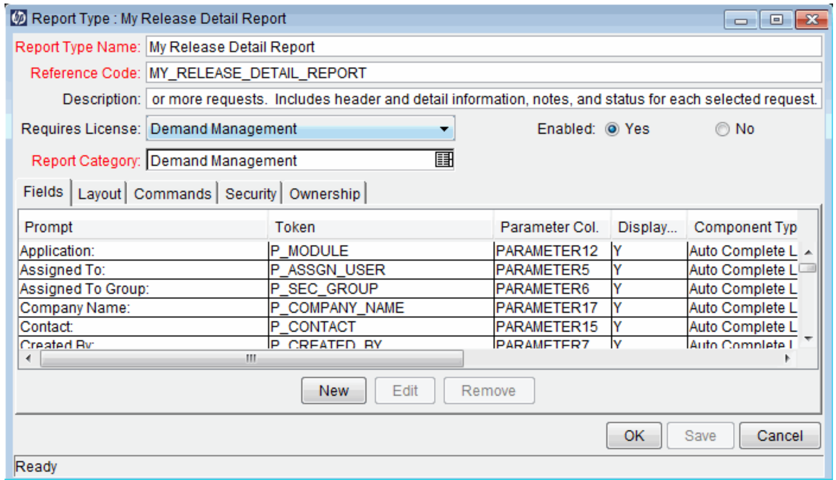
3. Type a **Report Type Name.**
4. Click **Copy** to continue. Otherwise, click **Cancel** to abort.

   If you continued, the Question window opens.



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

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



6. View or modify the settings using the information provided in *Report Type Windows* on page 176.

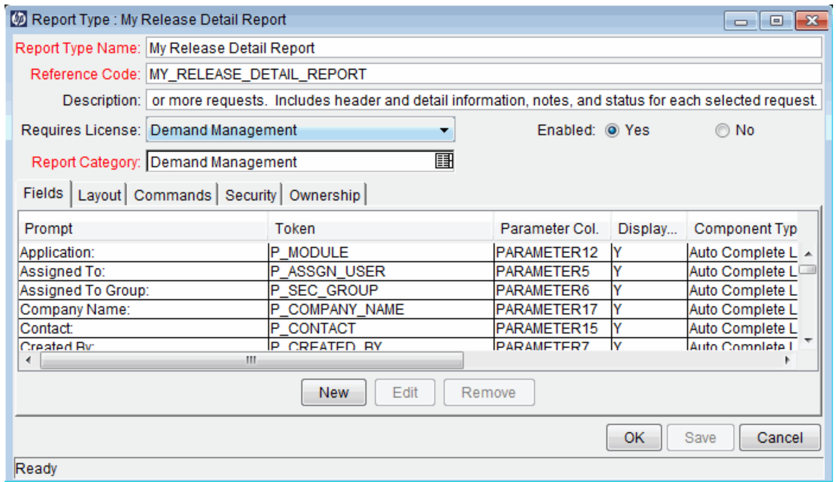
Modifying an Existing Report Type

To update an existing report type:

1. From the Report Type Workbench, select the desired report type.

2. Open the report type either by double-clicking the highlighted row or clicking **Open.**

   The Report Type: <*Report*> window opens.



3. View or modify the settings using the information provided in *Report Type Windows* on page 176.

Report Type Windows

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

The Report Type window is composed of:

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

General Information Fields

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

View or modify the general information fields for the given report type, using the information described in *Table 8-1* on page 177.

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

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

Fields Tab

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

Use the **Fields** tab to view and edit the fields for the given report type. Each field in a report type is represented by its own row on the **Fields** tab. Settings for each field are configured using the Field window (as shown in *Figure 8-2* on page 178). Select any existing field to modify its settings, or click **New** to create a new field.

Figure 8-1. Report Type window Fields tab

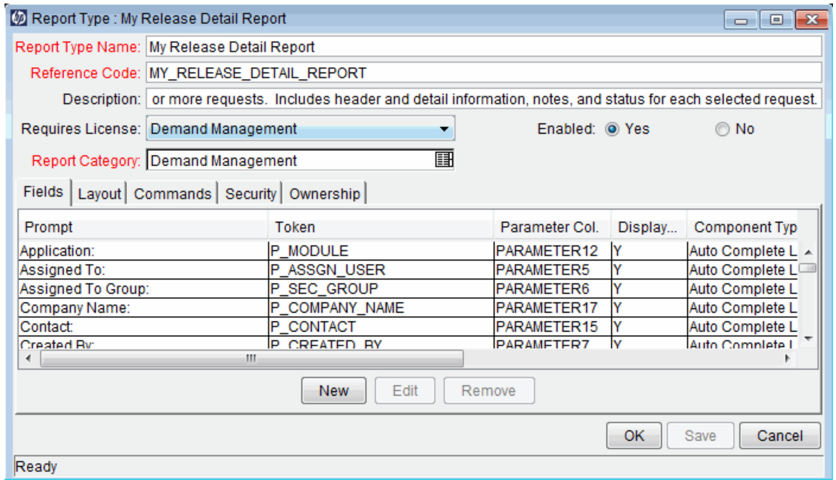
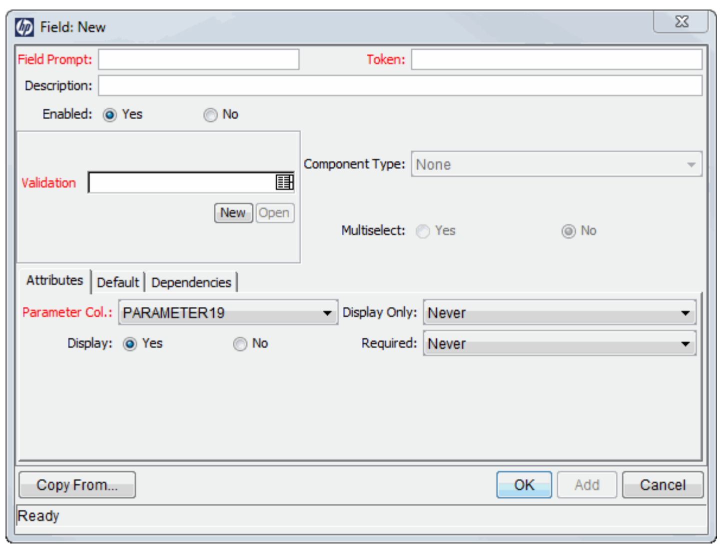


Figure 8-2. Field window



The Field window consists of the following:

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

Field Window General Information

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

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

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

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

Field Name	Description
Multiselect	Option to allow users to select more than one entry for the field. This option is only valid for fields using the auto-complete component.

Attributes Tab

View or modify each field on the **Attributes** tab, as described in *Table 8-3 on page 181*.

Figure 8-3. Field window Attributes tab

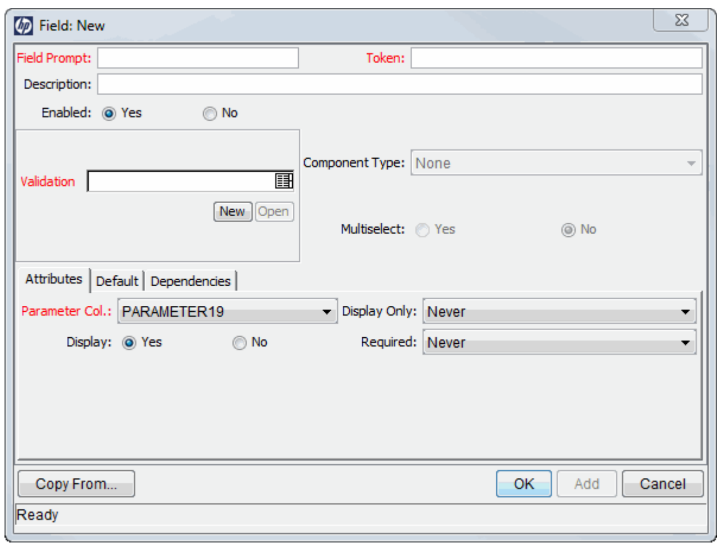


Table 8-3. Field window Attributes tab field descriptions

Field Name	Description
Parameter Col	Select the unique internal database table column for storing the value of this field. Choices are limited to 50 columns.
Display Only	Select whether the field can be updated or is read-only. Choices include: • **Always.** The field is only displayed and cannot be modified. (The field appears grayed-out similar to **Component Type** in *Figure 8-3*.) • **Never.** The value for the field can be modified. • **Use Dependency Rules.** Display of the field relies on the settings in the **Dependencies** tab.
Display	Option for the field to be visible in Submit Report: <*Report Name*> window.
Required	Select whether a value must be supplied for this field. Choices include: • **Always.** A value for this field is always required. (An asterisk will precede the field prompt in the report as shown for **Show Columns** in *Figure 3-2* on page 34.) • **Never.** A value for this field is optional. • **Use Dependency Rules.** Requiring a value for this field relies on the settings in the **Dependencies** tab.

Default Tab

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

Figure 8-4. Field window Default tab

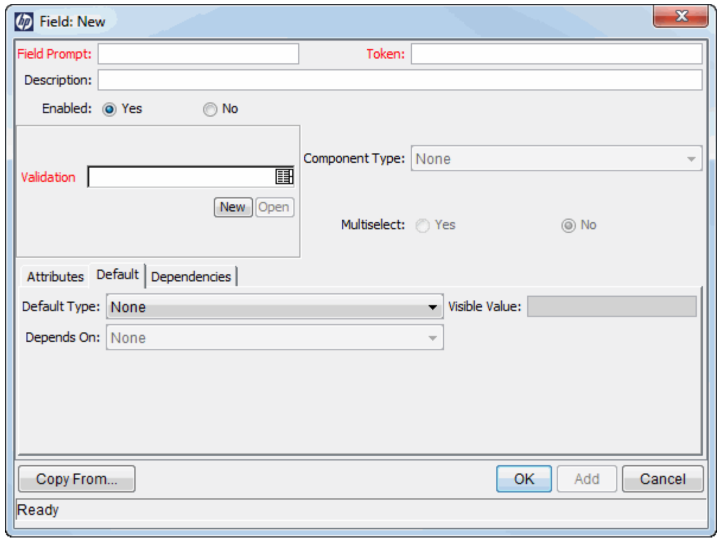


Table 8-4. Field window Default tab field descriptions

Field Name	Description
Default Type	Select the type of default value to use. Choices include: • **Constant.** Specifies that the constant value provided in the **Visible Value** field should be displayed. • **Parameter.** Specifies that the dynamic value provided in the **Depends On** field should be displayed. • **None.** Specifies that no default value should be displayed.
Visible Value	Specify the default value. This value should be what the user would typically specify in the field. If the report type field that you are defining is validated using a drop-down or an auto-complete list, this field displays only valid values. For example, if you have selected a drop-down list validation with possible values of High, Medium, or Low, you can specify a **Visible Value** of only High, Medium, or Low. This field is enabled only if **Constant** is chosen as the **Default Type.**
Depends On	Select the default value. This value should be what the user would typically specify in the field. Choices are limited to those tokens defined for this report type This field is enabled only if **Parameter** is chosen as the **Default Type.**

Dependencies Tab

View or modify each field on the **Dependencies** tab, as described in *Table 8-5* on page 185.

Figure 8-5. Field window Dependencies tab

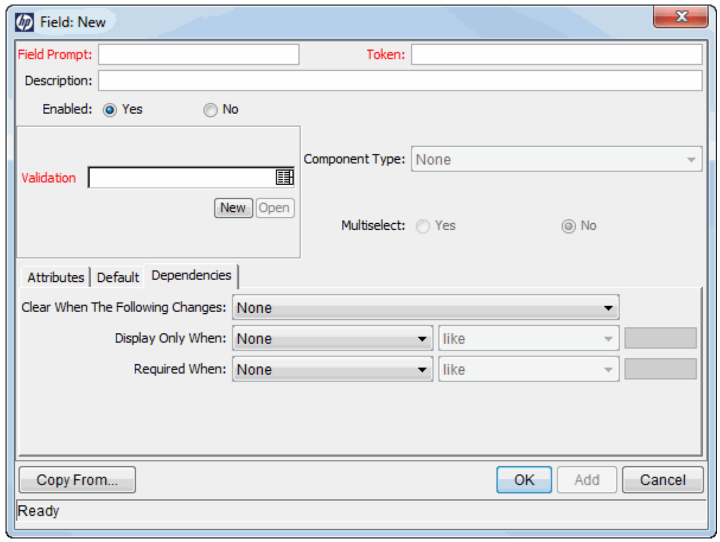


Table 8-5. Field window Dependencies tab field descriptions

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

Layout Tab

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

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

Figure 8-6. Report Type window Layout tab

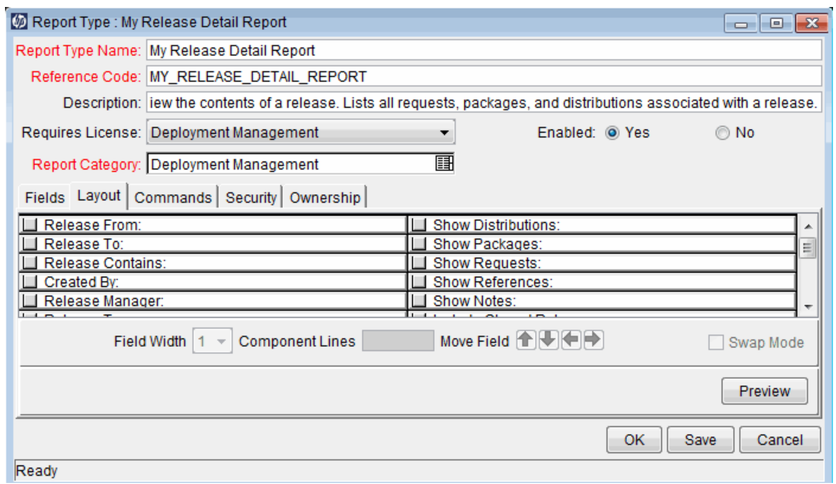


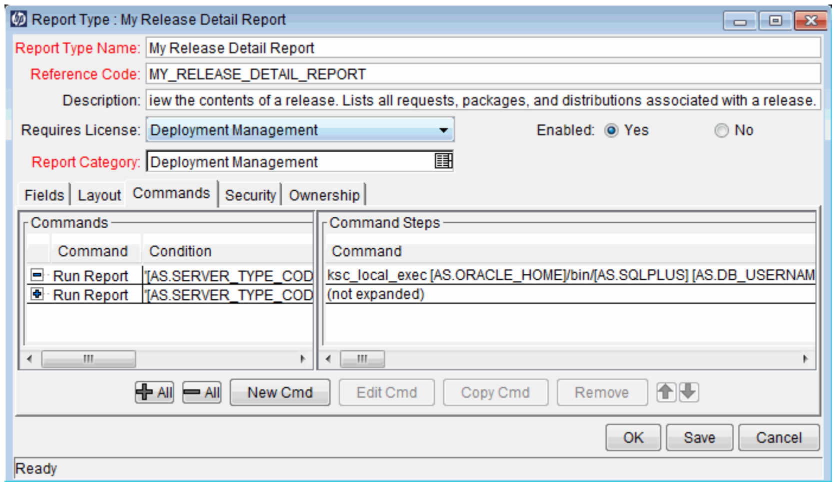
Table 8-6. Report Type window Layout tab field descriptions

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

Commands Tab

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

Figure 8-7. Report Type window Commands tab



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

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

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

View, specify, or modify each field of the Edit Command (shown in *Figure 8-9*) or New Command window (shown in *Figure 8-8*), as described in *Table 8-7* on page 189. (Similar to Report Type windows, the only difference in these two windows is whether they include data.)

Figure 8-8. New Command window

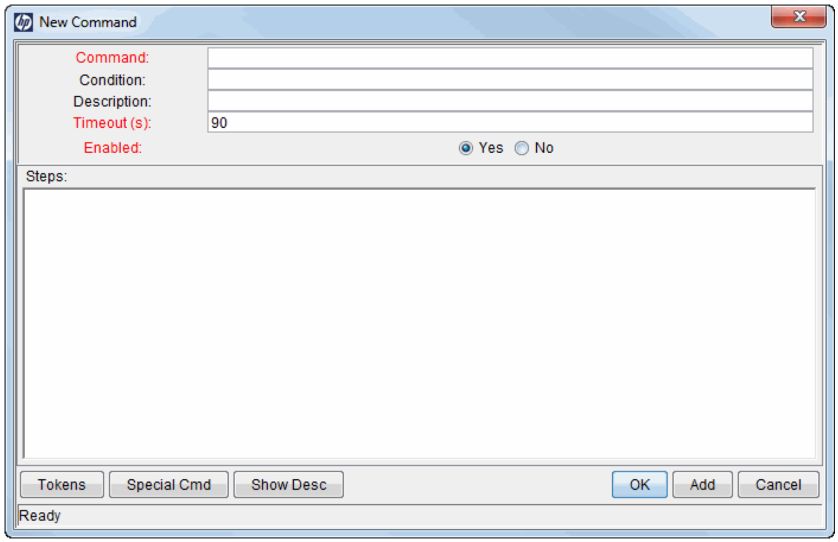


Figure 8-9. Edit Command window

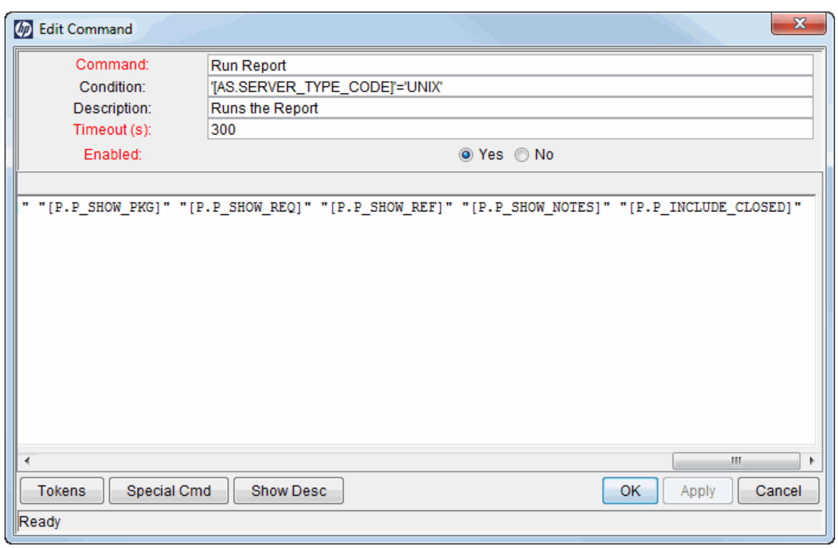


Table 8-7. Command window field descriptions

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

Security Tab

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

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

View or modify each field on the Security tab, as described in *Table 8-8* on page 191.

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

Figure 8-10. Report Type window Security tab

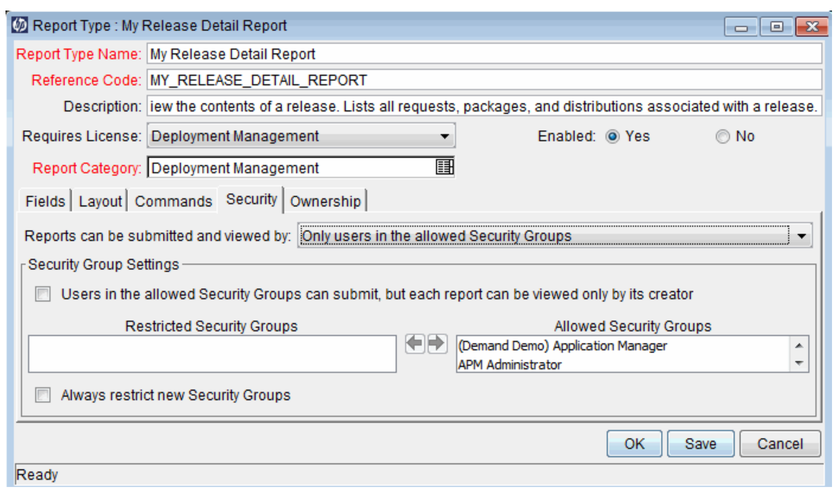


Table 8-8. Report Type window Security tab field descriptions

Field Name	Description
Reports can be submitted and viewed by	Select the users who can use this report. Choices include: • **All users with Report Browsing access** (meaning users with the System: Submit Reports access grant) • **Only users in the allowed Security Groups**
The following fields are enabled only if the value for **Reports can be submitted and viewed by** is set to **Only users in the allowed Security Groups.**	
Users in the allowed security groups can submit, but each report can only be viewed by its creator	Option for the results of the report to be viewable only by its creator.
Restricted Security Groups	Select one or more security groups that are restricted from using this report type.
Allowed Security Groups	Select one or more security groups that are allowed to use this report type.
Always restrict new Security Groups	Option to automatically add any new security groups to the **Restricted Security Groups** list.

Ownership Tab

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

Use the **Ownership** tab to view and edit ownership groups for the given report type. View or modify each field on the **Ownership** tab, as described in *Table 8-9* on page 192.

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

Figure 8-11. Report Type window Ownership tab

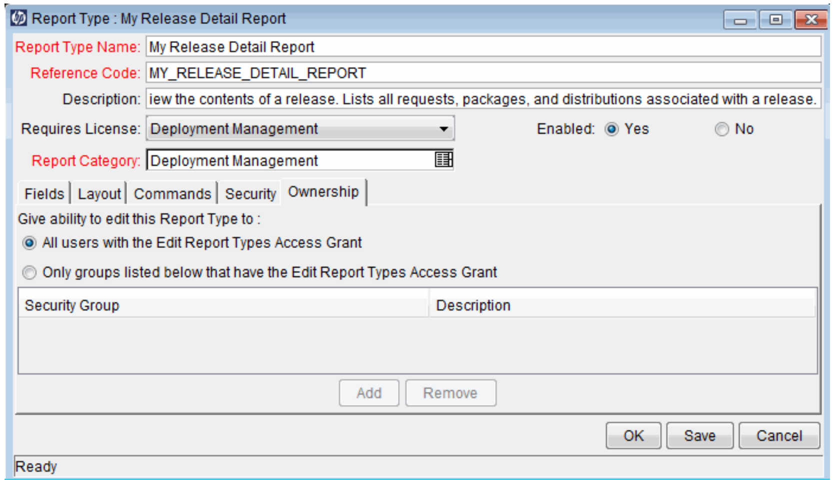


Table 8-9. Report Type window Ownership tab field descriptions

Field Name	Description
Give ability to edit this Report Type to	Indicate who should have the ability to copy, edit, or delete this report type. Choices include: • **All users with the Edit Report Types Access Grant.** Enables all users with the Edit Report Type access grant. • **Only Groups listed below that have the Edit Report Types Access Grant.** Limits the users to members of the group listed in the panel below this field. Use the **Add** and **Remove** buttons to manage this list.

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