HP Project and Portfolio Management Center

Software Version: 9.30

HP Program Management Configuration Guide

Document Release Date: September 2014
Software Release Date: September 2014

Legal Notices

Warranty

The only warranties for HP products and services are set forth in the express warranty statements accompanying such products and services. Nothing herein should be construed as constituting an additional warranty. HP shall not be liable for technical or editorial errors or omissions contained herein.

The information contained herein is subject to change without notice.

Restricted Rights Legend

Confidential computer software. Valid license from HP required for possession, use or copying. Consistent with FAR 12.211 and 12.212, Commercial Computer Software, Computer Software Documentation, and Technical Data for Commercial Items are licensed to the U.S. Government under vendor's standard commercial license.

Copyright Notice

© Copyright 1997 - 2014 Hewlett-Packard Development Company, L.P.

Trademark Notices

Adobe® is a trademark of Adobe Systems Incorporated.

Microsoft® and Windows® are U.S. registered trademarks of Microsoft Corporation.

UNIX® is a registered trademark of The Open Group.

Documentation Updates

The title page of this document contains the following identifying information:

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

To check for recent updates or to verify that you are using the most recent edition of a document, go to: **http://h20230.www2.hp.com/selfsolve/manuals**

This site requires that you register for an HP Passport and sign in. To register for an HP Passport ID, go to: **http://h20229.www2.hp.com/passport-registration.html**

Or click the **New users - please register** link on the HP Passport login page.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

The following table indicates changes made to this document since the last released edition.

Support

Visit the HP Software Support Online web site at: **http://www.hp.com/go/hpsoftwaresupport**

This web site provides contact information and details about the products, services, and support that HP Software offers.

HP Software online support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. As a valued support customer, you can benefit by using the support web site to:

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

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To register for an HP Passport ID, go to:

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

To find more information about access levels, go to:

http://h20230.www2.hp.com/new_access_levels.jsp

HP Software Solutions Now accesses the HPSW Solution and Integration Portal Web site. This site enables you to explore HP Product Solutions to meet your business needs, includes a full list of Integrations between HP Products, as well as a listing of ITIL Processes. The URL for this Web site is **http://h20230.www2.hp.com/sc/solutions/index.jsp**

Contents

Chapter 1: Getting Started with HP Program Management Configuration

-

-

-

Overview of HP Program Management

HP Program Management gives program managers a single location from which to initiate, operate, and manage a portfolio of programs and projects. An enterprise can use it to organize and guide the delivery of a business capability through multiple projects and releases, while maintaining alignment with the overall corporate vision.

In Project and Portfolio Management Center (PPM Center), a program is a collection of proposals, projects, and assets linked by common business objectives, and associated scope changes, risks, and issues. For example, XYZ Corporation creates a program to upgrade its customer service computer system to better meet the needs of its sales force. The Customer Service, Sales, and IT organizations create their own projects for this program. Changes and proposed changes at both the program and project level are tracked together.

HP Program Management users can drill down into projects and requests for detailed information. Users can view roll-ups of relevant data from projects and requests.

Program managers can:

- Oversee the milestones and deliverables of all IT projects

- Identify and mitigate risk

- Manage scope changes

- Resolve inter-project issues

Like projects, programs have associated health conditions and configurable exception indicators. However, while a project represents a body of work with a distinct start and finish, programs are often open-ended, and involve initial implementation as well as ongoing maintenance, upgrade, and realignment with changing organization business objectives.

Program-Related Request Types

During the life of a program, problems and concerns arise that must be addressed. PPM Center provides a framework that your organization can use to identify and, ultimately, resolve problems through submitted requests. The requests that users submit are tracked, rejected, completed, and reported.

HP Program Management includes the following request types, all of which affect programs:

- **Program issue requests.** Issue requests submitted directly against a program provide a means of managing issues at the program level. These can span multiple request types. (For example, bugs and enhancements are both issues.) Each request type is processed along its assigned workflow, although the request types may have fields in common for tracking purposes.

- **Project issue requests.** Project issues introduce a framework for managing project issues. Issues can span multiple request types. These can span multiple request types. Each request type is processed along its own workflow, although the request types may have fields in common for tracking purposes.

- **Program risk requests.** Program risk requests provide a way to manage threats to a program. The process of gathering information about risks, including their probability of occurrence and potential impact, is streamlined. Each submitted risk request is processed along its assigned workflow.

- **Project risk requests.** Project risk requests provide a way to manage threats to a project and program. The process of gathering information about risks, including their probability of occurrence and potential impact, is streamlined. Each submitted risk request is processed along its assigned workflow.

- **Project scope change requests.** Project scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. The program manager can assess submitted scope change requests before rejecting them or incorporating them into the program or project scope.

  Each submitted risk request is processed along its assigned workflow. Program and project scope can be controlled by ensuring that potential changes are clearly identified, aligned, and processed.

To use a given request type in HP Program Management, that request type must include an HP Program Management field group. A field group is a set of preconfigured fields delivered with PPM Center products. You can use these field groups to implement a solution quickly or to enable certain functions to act in concert in PPM Center.

For example, the Program Issue field group allows requests to be treated as issues in a program and activates consistent information tracking for these issues. This field group is associated with a request type (through the request header type) to enable basic HP Demand Management features such as request scheduling and analysis.

"Figure 1-1. Field Groups window" on the next page shows the Field Groups window, which you use to select the HP Program Management field groups to associate with a request header type. "Configuring

HP Program Management Request Types and Workflows" on page 13 provides details on how to select the field groups.

Figure 1-1. Field Groups window
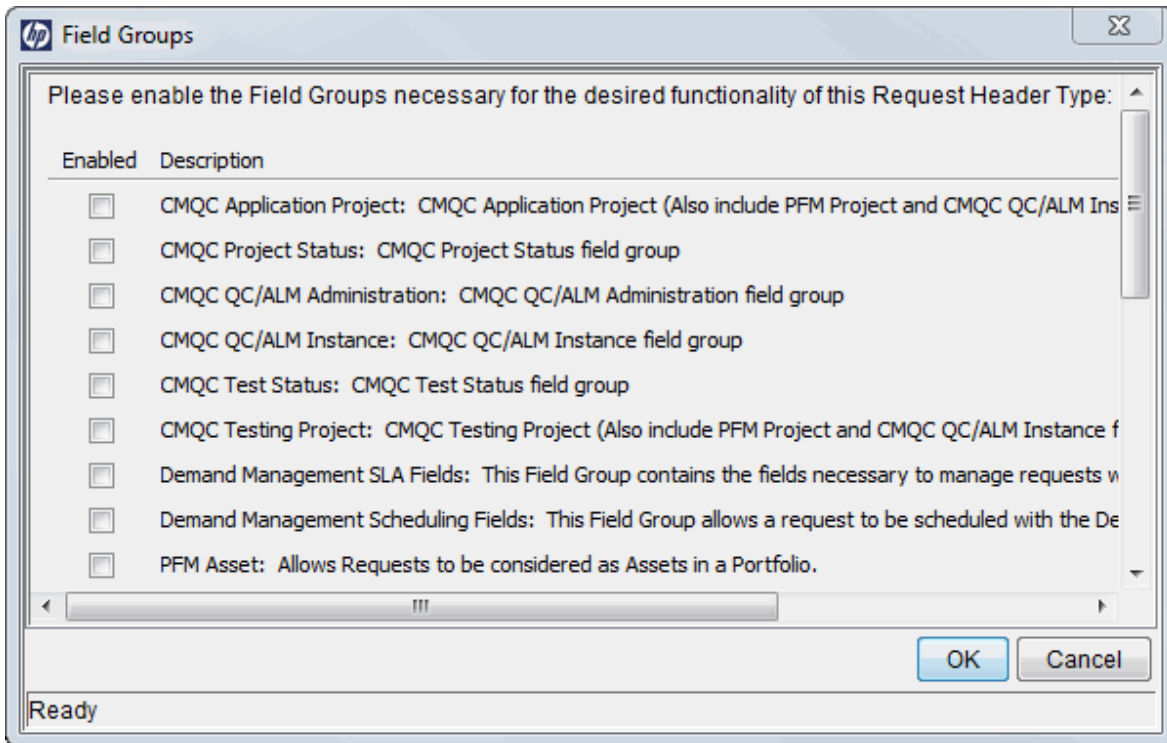
Each HP Program Management request type must be linked to its corresponding field group and to a specific HP Program Management workflow. Likewise, each HP Program Management workflow must be linked to a specific HP Program Management request type.

Table 1-1. HP Program Management request types and field groups

Request Type	Field Group	Fields
Program Issue	Program Issue: Allows requests to be considered as issues in a program.	**Summary** • Issue No. • Issue Status • Created By • Created On • Program • Priority • Assigned To • Description • Workflow • Contact Name • Request Group • Contact Phone • Department • Request Type • Contact Email • Application • Assigned Group • Sub-Type • Company • % Complete **Issue Details** • Date Identified • Due Date

Table 1-1. HP Program Management request types and field groups, continued

Request Type	Field Group	Fields
		- Issue Type - Detailed Description - Proposed Solution - Business Function
Program Reference	Program Reference: Contains a field that allows a user to add a program reference to a request.	Program

Overview of HP Program Management Configuration

This section presents information about the high-level steps involved in configuring HP Program Management for your organization. "Configuring HP Program Management Request Types and Workflows" on page 13 and "Configuring Security for HP Program Management" on page 35 contain the detailed procedures you use to perform these steps.

Step One: Gather Information

The first step in configuring HP Program Management is to gather your program requirements. To deploy HP Program Management effectively, you must determine which program-related request types to use.

Different kinds of information are required to process each program-related request. For each field in the program-related request, collect the following information:

- **Field name.** Field names help ensure that the information captured in a request is correct and sufficient. Use the Request Type Workbench to set up a request so that it contains the fields required to gather the required information.

- **Information type.** What type of information do you need? Should the value of the field be entered as text, or will users select a value from a list? The field information type is governed by its validation, which defines the field component type, as well as what information users can enter in the field. For example, a field using a numeric text field validation accepts only numeric values.

- **Field behavior.** Configuring the behavior of a field helps to ensure that the correct information is collected. For example, to ensure that requests include specific information, you can make a field required.

  You can set up fields that are populated automatically based on values in other fields. You can also set up fields that are read-only or hidden based on the access grants or the workflow step.

Note: For detailed information about how to configure request types, see the *HP Demand Management Configuration Guide.*

"Table 1-2. HP Program Management request types and workflows" below lists the request types and workflows that HP supplies for all HP Program Management entities.

Table 1-2. HP Program Management request types and workflows

Request Type	Workflow	Definition
Program Issue	Issue Management Process	A request type used to enter issues directly against a program.
Project Issue	Issue Management Process	A request type used to enter issues into a project associated with a program.
Program Risk	Risk Management Process	A request type used to enter risk information into a program.
Project Risk	Risk Management Process	A request type used to enter risk information into a project associated with a program.
Project Scope Change	Scope Change Request Process	A request type used to enter scope changes into a project associated with a program.

If these request types and workflows are adequate, no further requirements gathering is necessary.

Note: For information on how to add HP Program Management-related portlets to PPM Dashboard pages, see the *Creating Portlets and Modules* guide. For information on how to add the preconfigured Program Manager page to the PPM Dashboard and modify it to suit your needs, see the *HP Program Management User's Guide.*

Step Two: Configure HP Program Management Request Types

After you gather program requirements, configure the request header types associated with existing request types to include the required HP Program Management field group. For details, see "Configuring HP Program Management Request Types and Workflows" on page 13.

Note: Field groups are sets of preconfigured fields delivered with PPM Center. You can use them to implement a solution quickly or to enable certain functions simultaneously. For example, in HP Demand Management, the Demand Management Scheduling Fields field group enables consistent tracking of information across multiple request types.

Step Three: Configure HP Program Management Workflows

Configure the request header types associated with workflows to include the required HP Program Management field group. For details, see "Configuring HP Program Management Workflows" on page 18.

Step Four: Add Custom User Data Fields to Program Pages

You can define custom fields to capture additional information that standard fields on the View Program and Modify Program pages in the PPM Dashboard do not capture. For information on how to create custom user data fields, see "Configuring User Data" on page 21.

Step Five: Set Security for HP Program Management

Businesses often control access to certain information and business processes to protect sensitive information such as employee salaries, or to simplify business processes by hiding data that is irrelevant to specific users. PPM Center includes features to help control data and process security by letting you:

- Select program managers and set up security access grants for these resources

- Determine who is to report on issues, risks, and scope changes, reporter and set up security access grants for these resources

- Limit the data displayed in some fields or windows

- Specify who can view, create, edit, or process PPM Center entities such as requests, packages, projects, portfolios, and programs

- Specify who can view, create, or edit PPM Center configuration entities such as workflows, request types, object types, and security groups

- Specify who can change security settings

> **Note:** In addition to the security-related tasks described in this guide, the program manager can use the Control Access page to configure security for a specific program. For details on how to use the Control Access page, see the *HP Program Management User's Guide.*

The steps you perform to configure security groups and users for HP Program Management are described in "Configuring Security for HP Program Management" on page 35.

> **Note:** Some business models require that specially designated security administrators set up user access grants and restrictions.

Related Documents

For additional useful information, see the following documents:

- *HP Program Management User's Guide*

- *Commands, Tokens, and Validations Guide and Reference*

- *Security Model Guide and Reference*

- *HP Demand Management Configuration Guide*

- *HP Deployment Management Configuration Guide*

- *HP-Supplied Entities Guide* (includes descriptions of all PPM Center portlets, request types, and workflows)

Chapter 2: Configuring HP Program Management Request Types and Workflows

Configuring HP Program Management Request Types

Based on the needs of your organization, you choose and configure the request types to use in HP Program Management. To do this, you add field groups to the request header type for the request and attach a workflow to the request type. This section provides the steps you follow to perform these tasks.

For detailed information about requests, request types, request header types, and workflows, see the *HP Demand Management Configuration Guide.*

> **Note:** To edit or create request types, you must have the Configuration license (system-level) and the Demand Mgmt: Edit Request Types access grants.

To configure a request type for HP Program Management:

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 **Demand Mgmt > Request Types.**

   The Request Type Workbench opens.

4. Click **List.**

   The **Results** tab lists all existing request types.

5. Open an existing request type or create a new request type.

   > **Note:** For information on how to create or open a request type, see the *HP Demand*
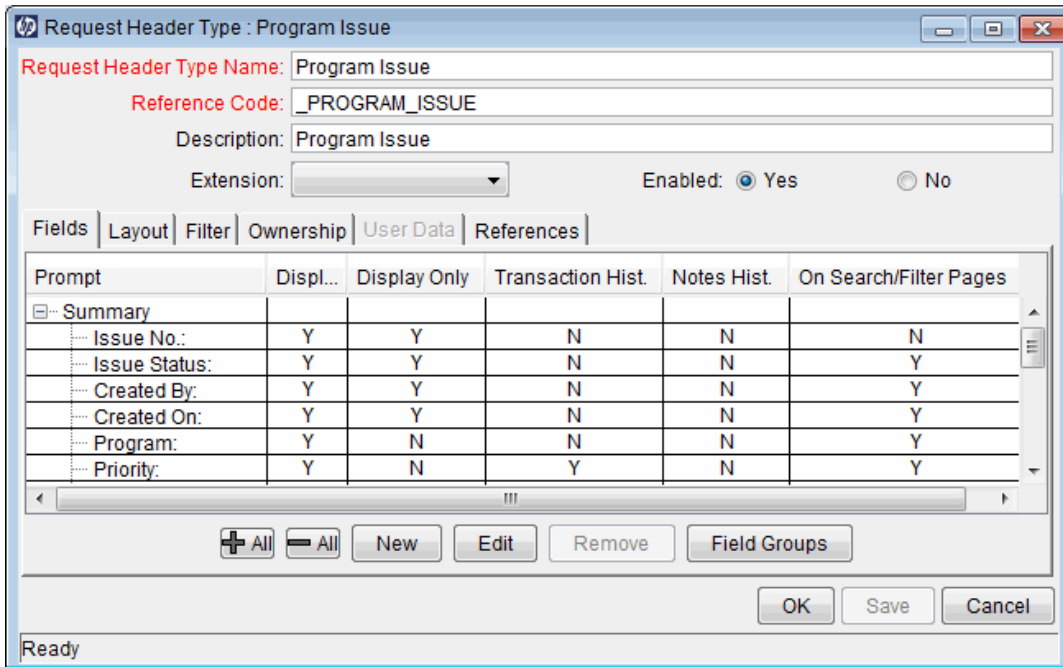
Management Configuration Guide.

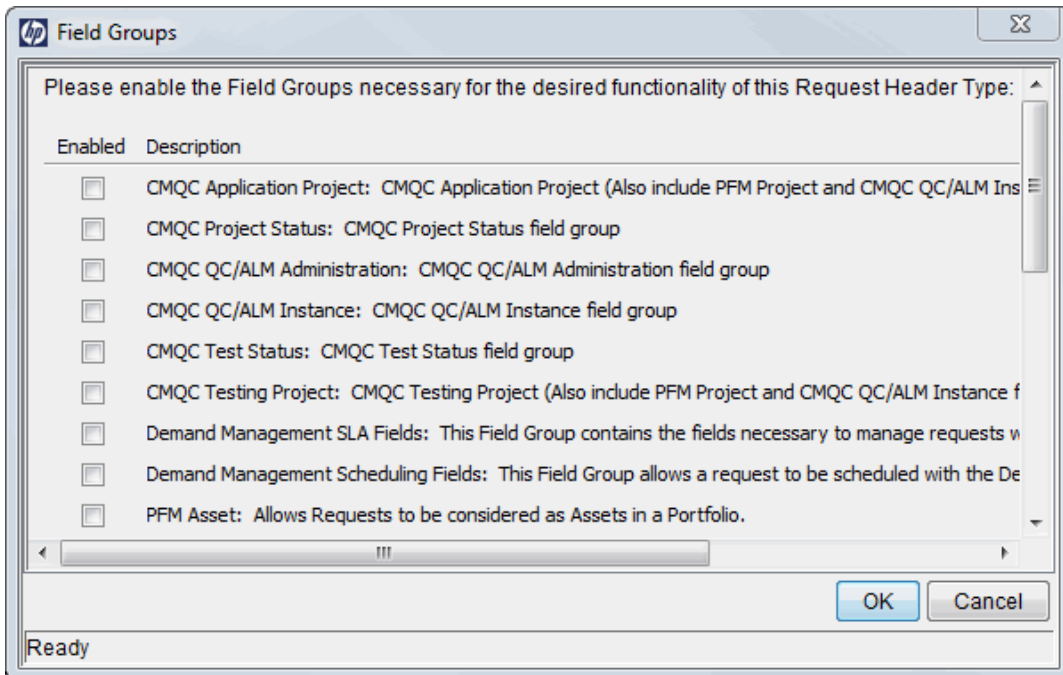The Request Type: *<Request Type Name>* window opens.
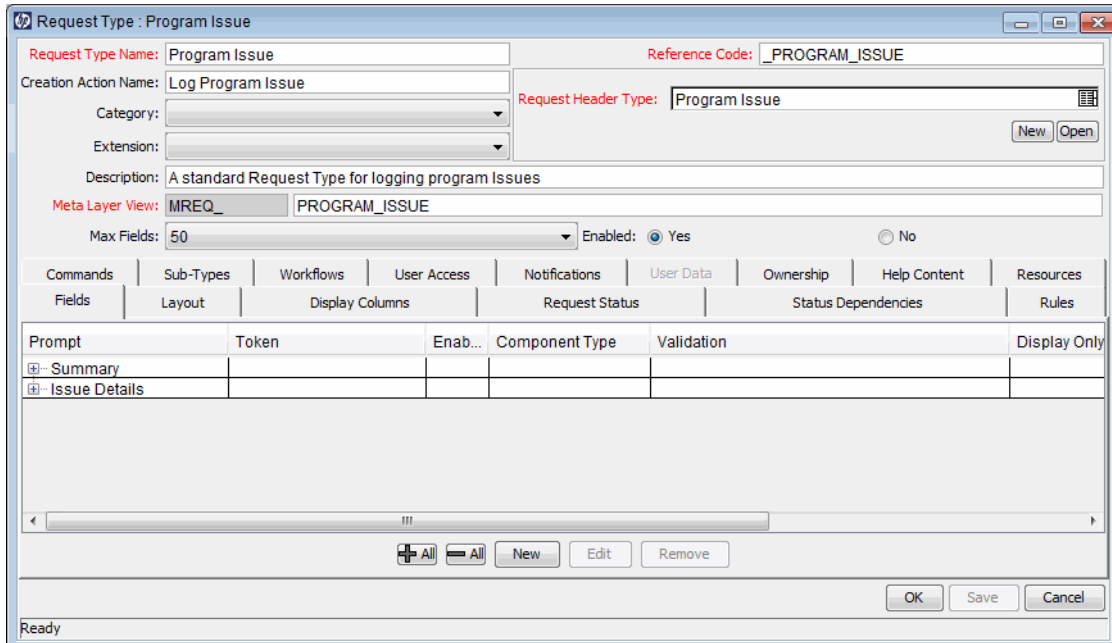
6. To add a field group to the request header type:

    a. In the top right of the Request Type window, under the **Request Header Type** box, click **Open.**

The Request Header Type <*Request Header Type Name*> window opens to the **Fields** tab.

b. Click **Field Groups.**

The Field Groups window opens.

c. To give the selected request header type the functionality you want it to have, select the **Enabled** checkbox for one or both HP Program Management field groups (**Program Issue** and **Program Reference**).

> **Note:** Selecting the Program Issue field group allows requests to be treated as issues in a program and activates consistent information tracking for these issues. This field group is associated with a request type (through the request header type) to enable basic HP Demand Management features such as request scheduling and analysis.
>
> Selecting the Program Reference field group adds a field to the request type so that users can add a program reference to requests.

d. Click **OK.**

e. In the Request Header Type window, click **OK.**

f. From the PPM Workbench shortcut bar, select **Request Types.**

The Request Type window opens.

> **Note:** For a list of HP Program Management request types and the field groups associated with them, see "Table 1-1. HP Program Management request types and field groups" on page 8.

7. To save the changes to the request type, click **Save.**

8. To add a workflow to the request type:

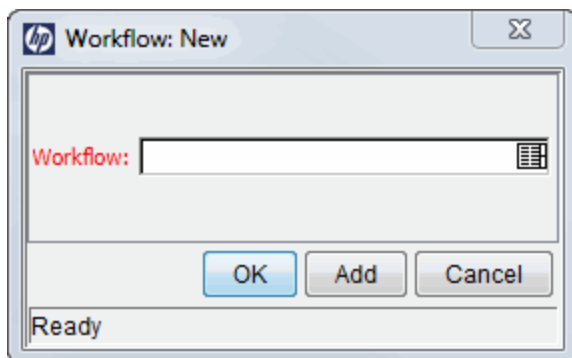> **Note:** For information about workflows and workflow steps, see the *HP Demand Management User's Guide.*

a. In the Request Type window, click the **Workflows** tab.

By default, the **All Workflows are allowed for this Request Type** checkbox is selected.
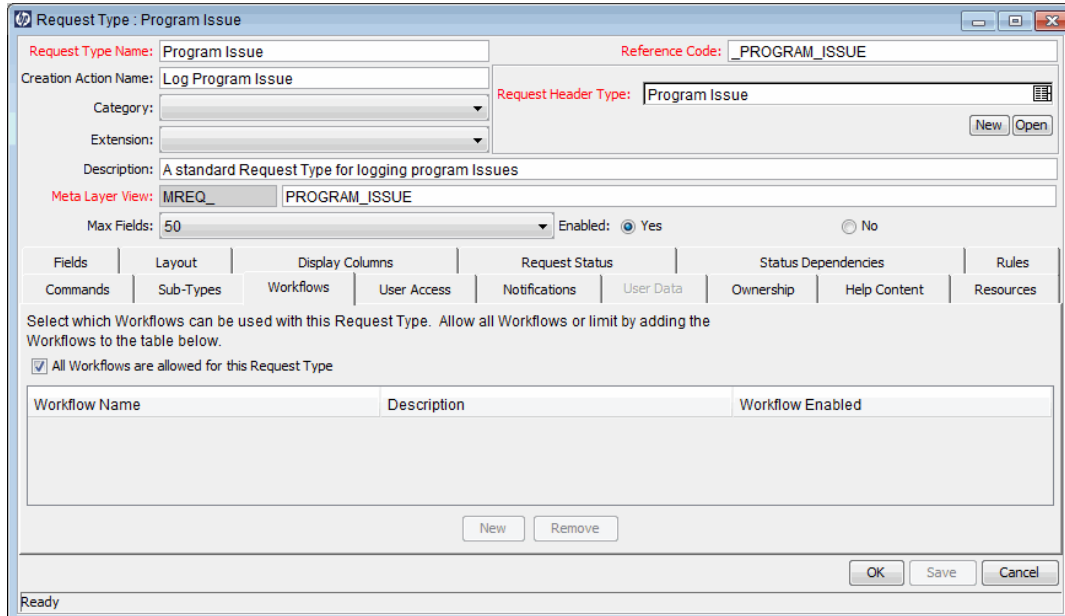
b. Clear the **All Workflows are allowed for this Request Type** checkbox.

c. Click **New.**

The Workflow: New dialog box opens.

d. In the **Workflow** box, select a workflow.

e. Click **OK.**

The **Workflows** tab lists the selected workflow.

f. To save the changes to the request type, click **Save.**

9. Click **OK.**

For detailed information on how to configure a request type, see the *HP Demand Management Configuration Guide.*

Configuring HP Program Management Workflows

"Configuring HP Program Management Request Types " on page 13 provided information on how to add a specific workflow to a specific HP Program Management request type. This section contains information on how to add a specific HP Program Management request type to a workflow. For information about workflows and workflow steps assigned to requests, see the *HP Demand Management User's Guide.*

Note: To edit request types, you must be assigned the Configuration system-level license and the Demand Mgmt: Edit Request Types access grant.

To add a request type to a workflow:

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 > Workflows.**
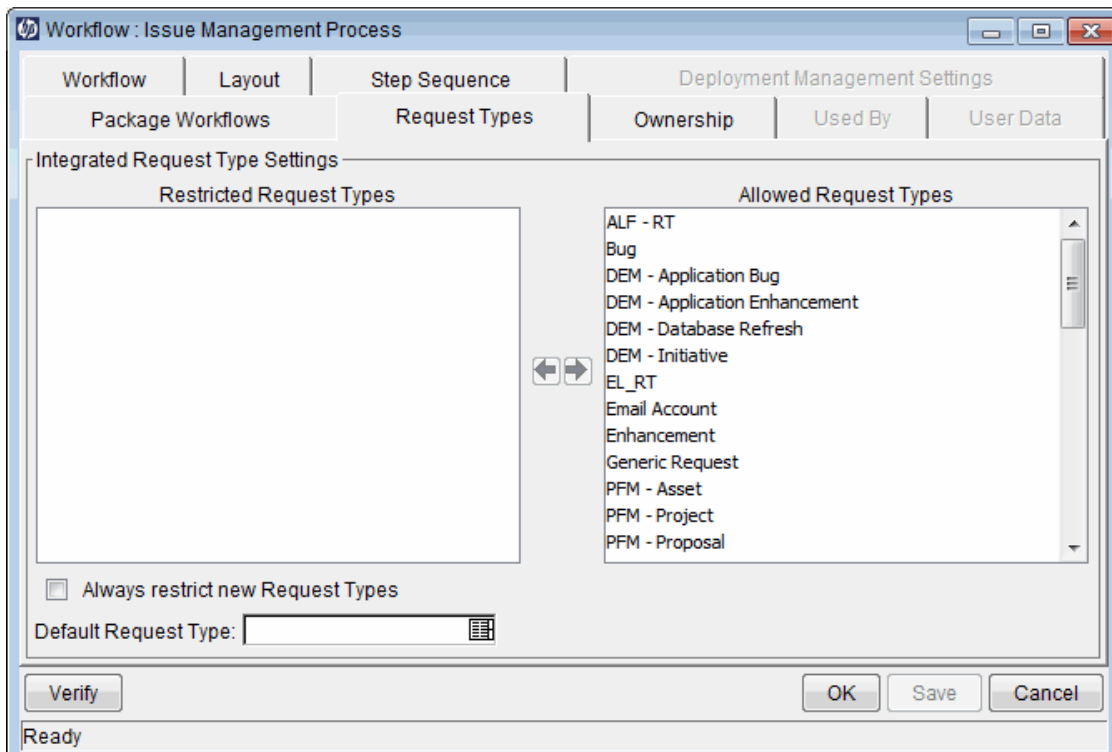
   The Workflow Workbench opens.

4. In the lower-right corner, click **List.**

   The Workflow Workbench lists all workflow records.

5. In the **Workflow Name** column, double-click the record for the workflow that you added to the request type in step 8.

   The Workflow: <*Workflow Name*> window opens.

6. Click the **Request Types** tab.

7. In the **Allowed Request Types** list, select all of the request types except the HP Program Management request type that you modified in "Configuring HP Program Management Request Types " on page 13.

> **Tip:** To select adjacent and nonadjacent list items, use the Shift and Ctrl keys, respectively.

8. To move the selected request types to the **Restricted Request Types** list, click the left-pointing arrow.

9. Click **OK.**

For more information about workflows, see the *HP Demand Management Configuration Guide.*

Configuring the Cost Roll-up Service Interval

As changes are made to cost information for projects, PPM Center does not automatically recalculate the cost data in real time. This means that, at any given time, the rolled-up cost information displayed for a program may be out of date.

Costing information is recalculated as part of a cost roll-up service that runs at a configurable interval. If a user completes an action that requires that costs be recalculated, PPM Center keeps a record of the updated entity to signify that a cost calculation and roll-up is pending. When the cost roll-up service runs, the pending entities are loaded and cost calculations are performed and rolled up.

Setting Up the Cost Roll-up Service

The cost rollup service is governed by the Cost Rollup Service on the PPM Server. "Table 2-1. Cost Roll-up Service" below describes this service.

Table 2-1. Cost Roll-up Service

Parameter	Description	Default Value
Cost Rollup Service	The Cost Rollup Service asynchronously recalculates and rolls up cost (project and program budget costs) as part of a service. The cost rollup service only recalculates project costs if changes have been made. In practice, the frequency with which the process runs has little effect on when a project is recosted. If a large number of active projects are updated throughout the day, it is very possible that the cost rollup service will take longer than the default 60 minutes to recalculate everything based on recent updates.	Status: Enabled Schedule Type: Simple Schedule: 1 hour

To modify the service, do the following:

1. From the menu bar in the standard interface, select **Open > Administration > Schedule Services**.

2. Click on the **Cost Rollup Service**.

3. Edit the Status, Schedule Type, and Schedule. See the online help for more information about the Schedule Type.
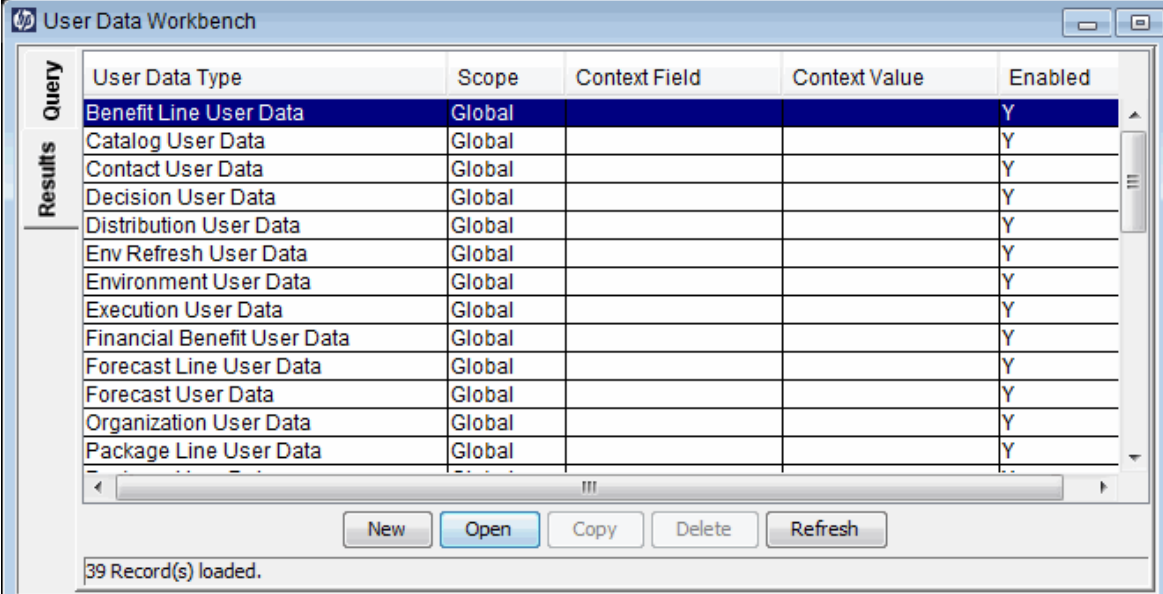
4. Click **Save**.

Chapter 3: Configuring User Data

Overview of User Data

Program pages in the PPM Dashboard display a set of standard fields for collecting and displaying program information. While these fields are sufficient for day-to-day processing, you can use user data fields to capture additional information specific to your organization. If you want to include additional fields on the View Program and Modify Program pages in the PPM Dashboard, you can define them in the User Data Workbench.

You configure user data types from the User Data Workbench in the User Data Context window. "Figure 3-1. User data types listed in the User Data Workbench" below shows the **Results** tab in the User Data Workbench, which lists the available user data types.

Figure 3-1. User data types listed in the User Data Workbench

Each user data type consists of the following components:

- The **User Data Type** column lists the user data types that PPM Center supplies out of the box. For programs, PPM Center supplies the Program User Data user data entity.

  > **Note:** Although you cannot create new user data types, you can define fields for an existing user data type.

- The **Scope** column indicates the scope of the user data type field. The scope value is either global or context. If the scope is global, the **User Data** tab for every designated entity contains the defined field. If the scope value is context (a context-sensitive user data type field), the defined user data field is displayed only on the **User Data** tab of entities with specific context fields and context value definitions. The scope of the Program User Data user data type is global.

- The **Context Field** column displays the label of context-sensitive fields. It is not enabled for the Program User Data type.

- The **Context Value** column lists the value (context) for context-sensitive fields. It is not enabled for the Program User Data type.

You can define up to 20 user data type fields for display on the your View Program and Modify Program pages in the PPM Dashboard. You can configure the major attributes of each field, including its graphical presentation, validation method, and whether it is required.

> **Caution:** Do not edit the `PMO - CR Level` validation because it is seed data. Editing it can cause both the `KPMO_PROGRAM_SCOPE_CHANGE_V` view and the Program Scope Change List portlet to fail.

Referring to User Data

After you create a user data field, you can refer to it from other parts of the product by its token name, preceded by the entity abbreviation and the user data (UD) qualifier. The token format is `[PREFIX.UD.USER_DATA_TOKEN]`. For example, if you defined a field for package user data with the token `GAP_NUMBER`, in the default format, the token would be `[PKG.UD.GAP_NUMBER]`.

Adding Custom User Fields to Programs

This section presents the steps you perform to add a custom field to your program pages.

> **Note:** When a custom user field is added to a program, this field is included on the Create New Program page.

To add a custom user field to program pages:

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 > User Data.**

   The User Data Workbench opens.
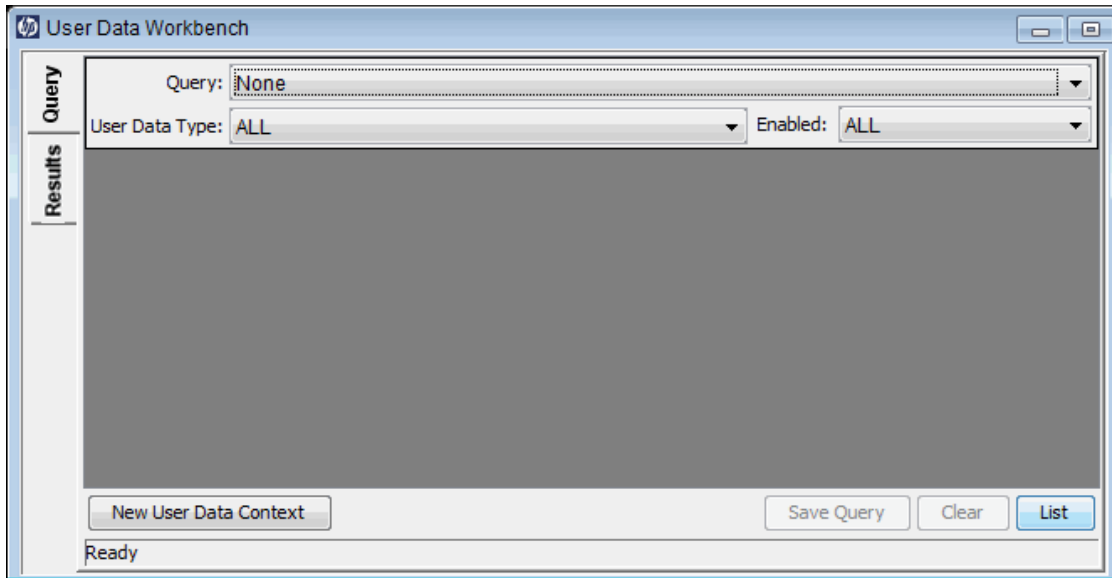
4. Click **List.**

   The **Results** tab lists the available user data types.

5. In the **User Data Type** column, double-click **Program User Data.**

   The User Data Context: Program User Data window opens to the **Fields** tab.
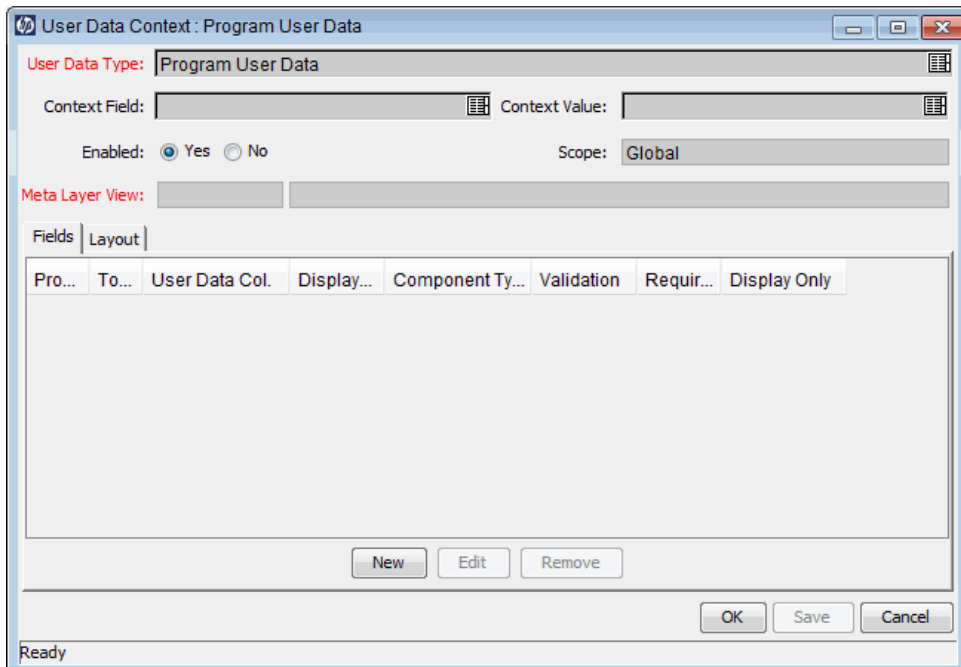
6. Click **New.**

The Field: New window opens to the **Attributes** tab.
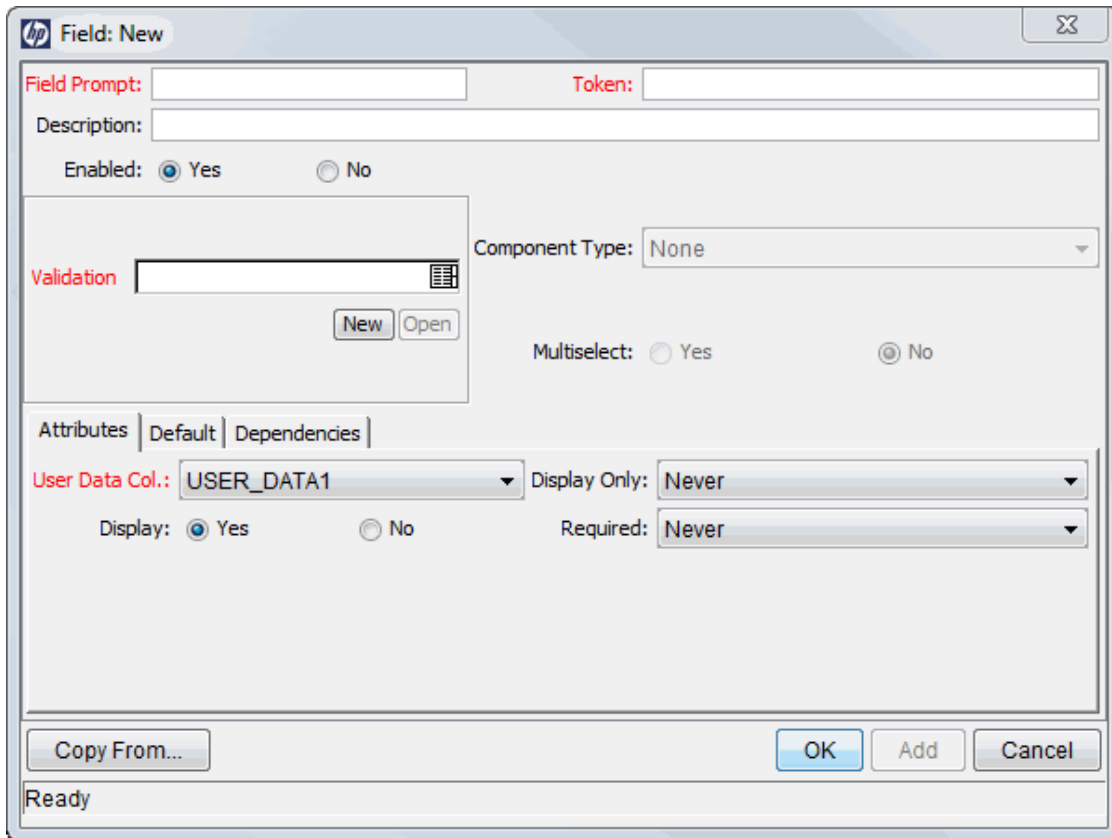
7. Enter the following information:

a. In the **Field Prompt** box, type the label to display for the new field.

b. In the **Token** box, type an uppercase text string to use to identify this field.

   The token name must be unique to the specific user data. An example token name is
   ASSIGNED_TO_USER_ID.

c. In the **Description** box, you can enter text that describes what the field captures and how it is to be used.

d. To enable the new field, leave **Enabled** selected.

e. In the **Validation** box, enter or select the validation logic to use to determine the valid values for the field.

   This can be a list of user-defined values, a rule that the result must be a number, and so on.

   The **Component Type** field indicates the field type (list, free-form text field, and so on). This read-only field is derived from the validation you selected.

    f. If the field lists selectable items, and you want users to be able to select more than one of these, select **Multiselect.**

       If you select **Multiselect,** the PPM Workbench displays a dialog box that lists limitations imposed on multiselect user fields.

    g. If you selected **Multiselect,** make a note of the limitations, and then click **Yes.**

8. On the **Attributes** tab, enter the following information:

    a. In the **User Data Col** list, select the internal column in which the field value is to be stored.

       These values are stored in the corresponding column in the table for programs. You can store information in up to 20 columns, which means that you can create up to 20 custom fields for programs. No two fields in user data can use the same column.

    b. To make the new field read-only at all times, in the **Display Only** list, select **Always.** To make the field editable at all times, select **Never.**

    c. To make the field visible to users, next to **Display,** leave **Yes** selected. To hide the field, select **No.**

    d. To make the field required (the user must specify a value) at all times, in the **Required** list, select **Always.** To make the field optional at all times, select **Never.**

At this point you can continue to configure the new field, save your changes and create another field, or save your changes and close the Field window.

9. Do one of the following:

  ■ Continue to configure the new field.

    For information on how to further configure the new field, see "Configuring the Default Value for a Custom User Field" on the next page and "Configuring Default Security for a Custom User Field" on page 29.

  ■ To save your changes and create another field, click **Add.**

    The Field window clears so that you can create another new field.

  ■ To save your changes and close the Field window, click **OK,** and then, in the User Data Context window, click **OK.**

# Configuring the Default Value for a Custom User Field

To configure the default value for a custom user field:

1. If the Field: *<Field Name>* window is open, skip to step 8, otherwise, continue to step 2.

2. Log on to PPM Center.

3. From the menu bar, select **Open > Administration > Open Workbench.**

    The PPM Workbench opens.

4. From the shortcut bar, select **Configuration > User Data.**

    The User Data Workbench opens.
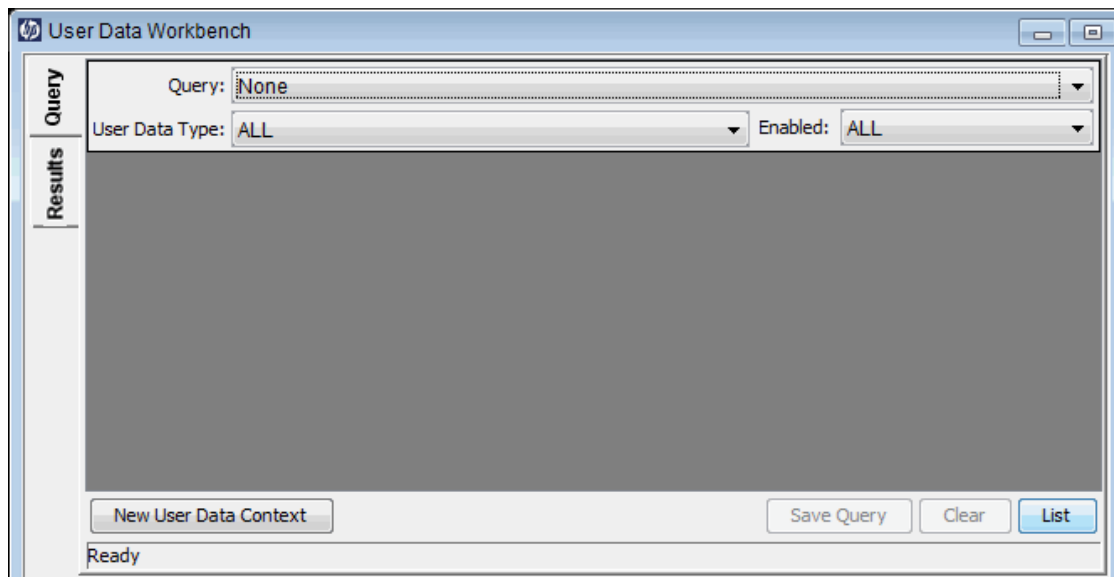
5. Click **List.**

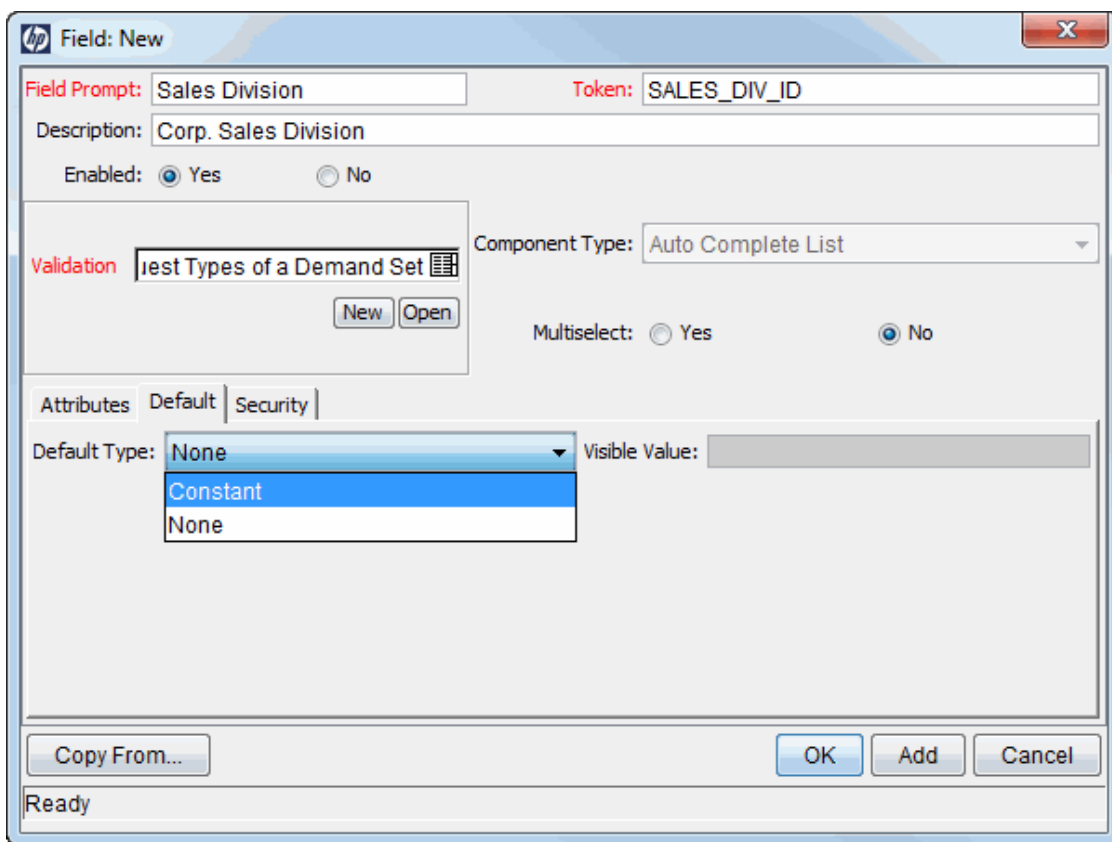   The **Results** tab lists the available user data types.

6. In the **User Data Type** column, double-click **Program User Data.**

    The User Data Context: Program User Data window opens to the **Fields** tab.

7. On the **Fields** tab, double-click the row that displays the field for which you want to configure a default value(s).

    The Field: *<Field Name>* window opens to the **Attributes** tab.

8. Click the **Default** tab.

9. Enter the following information:

   a. To indicate that the field is to have a default value, in the **Default Type** list, do one of the following:

      ○ To specify that the field default is to be a constant value, select **Constant.**

      ○ To specify that the field default is to have no default, select **None.**

   b. If you specified a constant default type, then in the **Visible Value** list, select the constant value.

10. Do one of the following:

    ■ Continue to configure the new custom field.

    ■ To save the custom field and close the Field window, click **OK,** and then, in the User Data Context window, click **OK.**

Configuring Default Security for a Custom User Field

This section provides the steps used to configure the default security setting for a custom field. Keep in mind that status dependencies and field-level dependencies can override these settings.
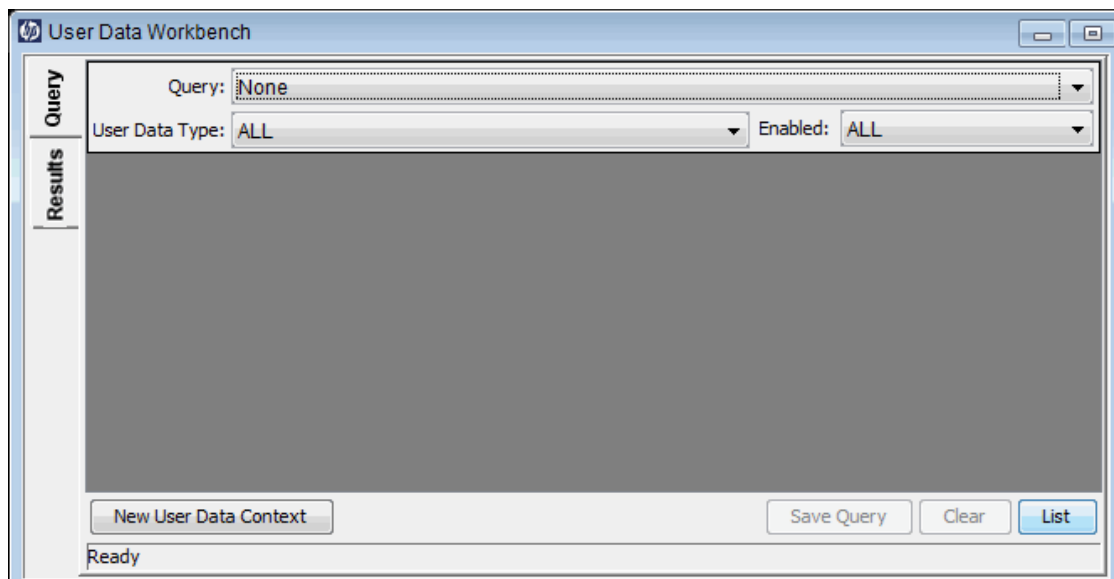
To configure the default security settings for a customer user field:

1. If the Field window is open, skip to step 8, otherwise, continue to step 2.

2. Log on to PPM Center.

3. From the menu bar, select **Open > Administration > Open Workbench.**

   The PPM Workbench opens.

4. From the shortcut bar, select **Configuration > User Data.**

   The User Data Workbench opens.

5. Click **List.**

   The **Results** tab lists the available user data types.

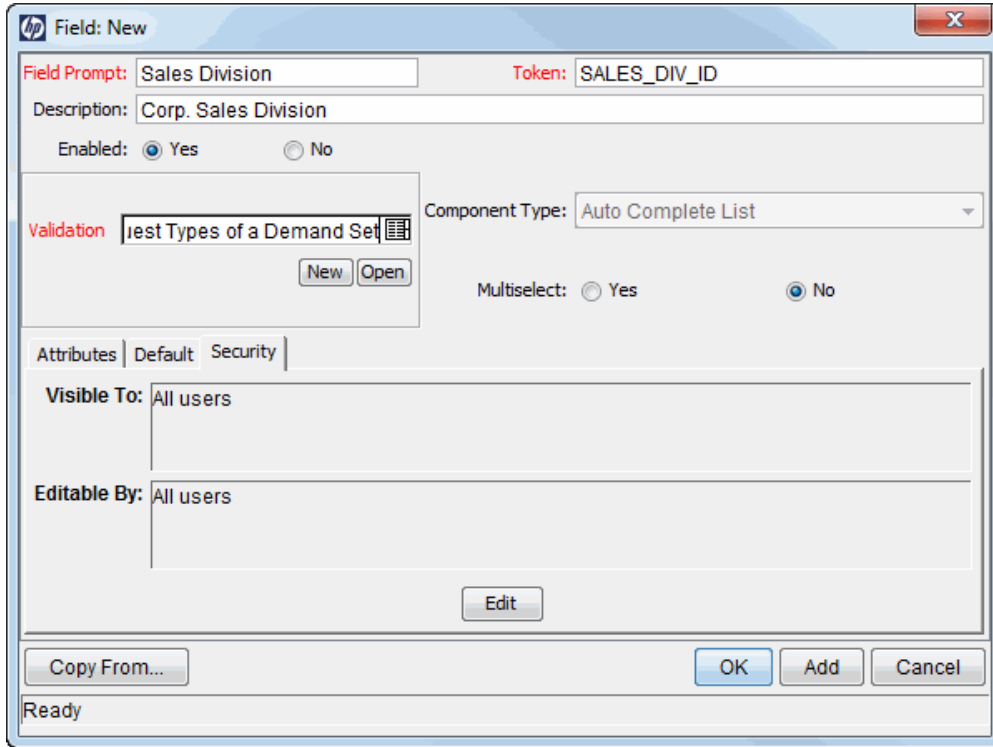6. In the **User Data Type** column, double-click **Program User Data.**

   The User Data Context: Program User Data window opens to the **Fields** tab.

7. On the **Fields** tab, double-click the row that displays the field for which you want to configure default security settings.
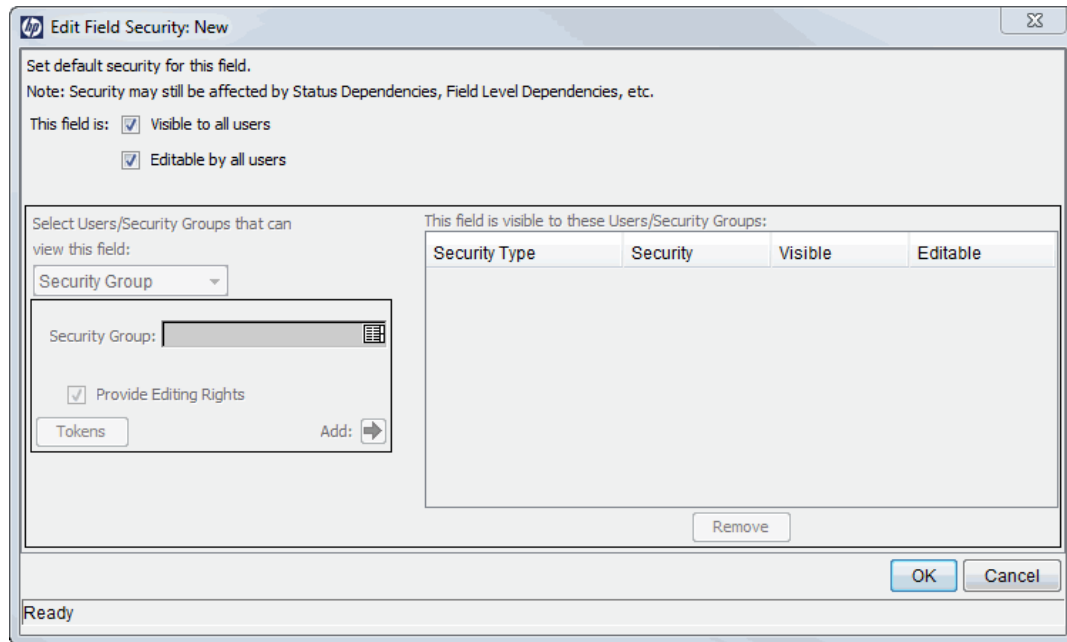
The Field window opens to the **Attributes** tab.

8. Click the **Security** tab.

a. Click **Edit.**

The Edit Field Security window opens.

9. To specify that only certain users or groups be able to view and or edit the custom field:

   a. Next to **This field is,** clear the **Visible to all users** and **Editable by all users** checkboxes.

   b. In the **Select Users/Security Groups that can view this field** list, select one of the following:

      ○ **Security Group**

      ○ **User**

      ○ **Standard Token**

      ○ **User Defined Token**

   Your selection determines the label displayed for the auto-complete field below the list.

   c. Use the auto-complete field to select the security groups, users, standard tokens, or user-defined tokens that you want to be able to view this field.

   d. To give the selected items the ability to edit the field, leave the **Provide Editing Rights** checkbox selected. To make the field read-only for your selection(s), clear the checkbox.

   e. Click **Add.**

   The table on the right lists your selection(s).

   f. Repeat step c through step e to configure field visibility for additional users and groups.

In the table on the right, the **Visible** and **Editable** checkboxes are selected by default for all of the selected users and group.

g. In the table on the right, clear the **Visible** checkbox for the users and groups from which you want the field to be hidden.

h. In the table on the right, clear the **Editable** checkbox for the users and groups for which you want the custom field to be read-only.

10. Click **OK.**

11. In the Field window, click **OK.**

12. In the User Data Context window, click **OK.**

Adding Columns to the Program Overview Page

If the COST_CAPITALIZATION_ENABLED server configuration parameter is set to true and if the financial summary settings for the program also enable separate tracking of capital and operating costs, the following columns are available to all users to add to the Program Overview page:

- **Approved Budget** (subordinate to **Capital Cost** in the list of selectable columns)

- **Approved Budget** (subordinate to **Operating Cost** in the list of selectable columns)

On the other hand, if the COST_CAPITALIZATION_ENABLED server configuration parameter is set to false or if the financial summary settings for the program disable separate tracking of capital and operating costs, the following column is available to all users to add to the Program Overview page:

- **Approved Budget**

For information about how to add columns to the Program Overview page, see the *HP Program Management User's Guide*.

Changed Column Names

The following column names have been changed on the Program Overview page:

- In the **Program Costs** section, **Planned** is renamed **Forecast.**

- In the **Content** section:

  - **Planned Labor** is renamed **Forecast Labor.**

  - **Planned Non-Labor** is renamed **Forecast Non-Labor.**

  - **Planned Total** is renamed **Forecast Total.**

More Information About Configuring User Data

For information about the following topics, see the *HP Deployment Management Configuration Guide:*

- Copying field definitions

- Configuring user data field dependencies (detailed steps)

- Editing user data fields

- Removing fields

- Configuring user data layout

Chapter 4: Configuring Security for HP Program Management

-

-

-

-

HP Program Management Security

This chapter describes how to use licenses, access grants and security groups to give users access to HP Program Management information and processes. For a detailed description of PPM Center security, see the *Security Model Guide and Reference.*

"Table 4-1. Security features" below lists the settings you use to control the data and process security in PPM Center.

Table 4-1. Security features

Security Feature	Definition
Licenses	Each user is assigned one or more licenses that determine which set of PPM Center product-related screens and functions is available to that user. Use the licenses in conjunction with access grants to give users access to specific fields and functions.
Access grants	Linked to users through security groups, access grants determine the windows and functions in which users can view or edit information or perform actions. Access grants also provide different levels of control over some entities and fields.
Entity-level restrictions	Use entity settings to: • Control who can create, edit, process, and delete PPM Center entities such as requests, packages, and projects. • Control which request types and object types can be used with certain workflows. You can set up these restrictions in the configuration entities (workflows, request types, and object types).

Table 4-1. Security features, continued

Security Feature	Definition
Field-level restrictions	For each custom field that you define in PPM Center, you can specify the conditions under which it is visible (or not) and editable (or read-only). You can also specify the users who can view or edit some fields.
Configuration-level restrictions	Use ownership groups settings to specify who can modify configuration entities. For example, to ensure that only designated users can change your PPM Center–controlled processes, select the users who can edit an existing workflow.

"Security Groups" on the next page of this chapter provides the steps to perform to configure security groups and users for HP Program Management.

Required Licenses

To use HP Program Management, you must have the following application licenses:

- Program Management

- Demand Management

- Project Management

For information about the system-level licenses required to configure security in PPM Center, see the *Security Model Guide and Reference.*

Program Management

The Program Management license provides access to basic Program Management functionality and to configuration of general Program Management settings. It must be used in conjunction with Demand Management and Project Management licenses.

Demand Management

The Demand Management license provides access to all Demand Management functionality.

Project Management

The Project Management license provides access to all Project, Resource, and Financial Management functionality available through the PPM Workbench, as well as access to advanced PPM Dashboard functions.

Access Grants

Access grants provide users (who have the required application licenses) with the permission required to access specific entities or perform specific functions within PPM Center.

The HP Program Management access grants are:

- **PMO: Create Programs.** When used with the Edit Programs access grant, this access grant allows a user to create a new program.

- **PMO: Edit Programs.** This access grant allows a user to modify all programs on which he is the assigned the program manager.

- **PMO: Edit All Programs.** This access grant allows users to create and modify any program.

- **PMO: View Programs.** This access grant allows users to view program definitions.

Security Groups

Using security groups in HP Program Management involves associating them with process (workflow) steps and potentially restricting user access to the HP Program Management entities—projects, requests, and financial summaries.

This section provides detailed instruction on how to create security groups and assign them access grants, add users to security groups, and associate the security groups with workflows (business processes).

Creating a Security Group and Assigning It Access Grants

A security group is essentially a collection of access grants. After you create and enable a security group, you can assign users to it. A user assigned to a security group assumes the access grants assigned to that security group.

PPM Center includes one default security group for HP Program Management. This security group, which is named PPM Program Manager, has all HP Program Management access grants assigned to it. Users that you add to this group can access and edit information for all programs.

You can define additional HP Program Management security groups to suit your needs.

> **Note:** To add access grants to a security group, you must be assigned the User Administration system-level license.

To create a security group and assign access grants to it:

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 **Sys Admin > Security Groups.**

   The Security Group Workbench opens.

4. At the lower-left part of the window, click **New Security Group.**

   The Security Group: Untitled window opens to the **Users** tab.

5. In the **Name** box, type a name for the security group.

6. Next to **Enabled,** click **Yes.**

7. Click **Save.**

8. Click the **Access Grants** tab.

   The **Available Access Grants** table lists all of the access grants that you can assign to a security group. The **Category** column lists the PPM Center functional area with which each grant is associated.

9. To assign access grants to your new security group:

   a. In the **Available Access Grants** table, select one or more access grants.

      > **Tip:** You can use the Ctrl and Shift keys to select adjacent and nonadjacent items in the list.

b. Click the arrow pointer.
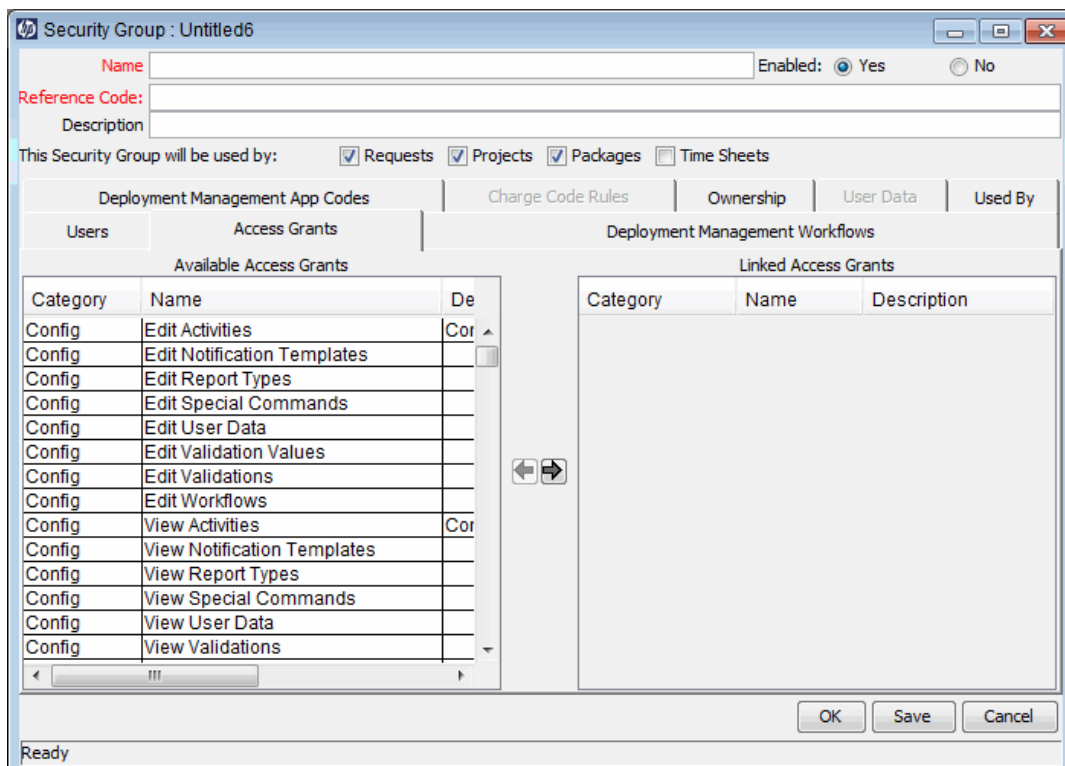
The **Linked Access Grants** table on the right lists the selected access grants, which are now associated with your security group.

10. To save the settings, click **OK.**

The Security Group Workbench lists the security group you created.

Note: If your PPM Center instance supports multiple languages, any security group you create is defined in the language you selected at logon (your session language). After the security group is created, it can be modified only in its definition language. For more information, see the *Multilingual User Interface Guide*.

"Table 4-2. HP Program Management security group scenario" on the next page lists details for the security group setup for two sets of (example) users who have different HP Program Management access grants assigned to them.

Table 4-2. HP Program Management security group scenario

Security Group	Category: Access Grant	Definition
Program Manager	• PMO: Create Programs • PMO: Edit Programs • PMO: Edit All Programs • PMO: View Programs	Corporate program managers who must have full access to programs.
Admin Program Mgmt	• PMO: View Programs	Line managers who only need to view programs.

Configuring HP Program Management Users

To assign access grants to a user, you add the user to a security group.

Note: To create a user, you must have the User Administration system-level license. For information on system-level licenses, see the *Security Model Guide and Reference.*

To assign a new user to one or more security groups:

1. Log on to PPM Center.

2. On the menu bar, select **Open > Administration > Open Workbench.**
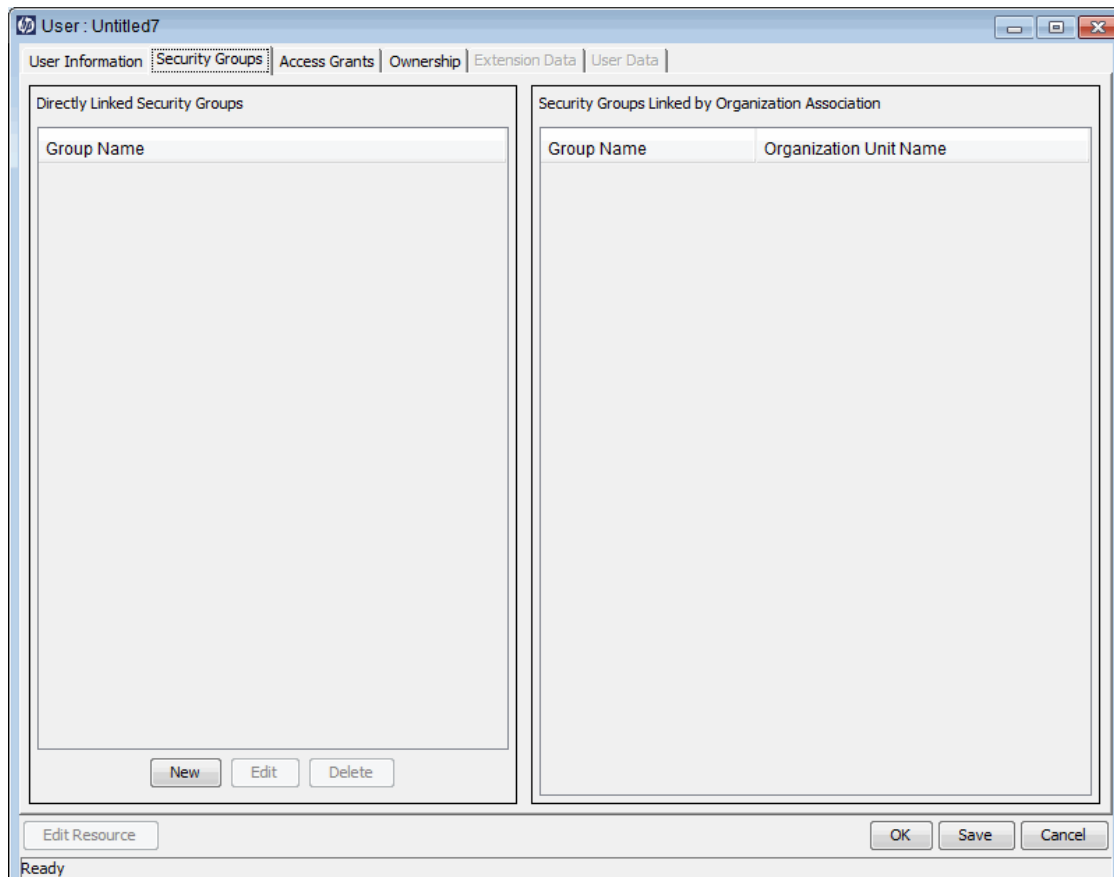
   The PPM Workbench opens.

3. On the shortcut bar, select **Sys Admin > Users.**

   The User Workbench opens.

4. Click **New User.**

   The User: Untitled window opens to the **User Information** tab.

5. Enter the required information (fields with labels displayed in red text) for the new user, and then click the **Security Groups** tab.

6. In the **Directly Linked Security Groups** box, click **New.**

   The Security Groups dialog box opens.

7. In the **Security Groups** field, click the auto-complete button, and then select the security groups.

8. Click **OK.**

9. To save your changes, click **OK.**

"Table 4-3. HP Program Management security group and license scenario" on the next page lists the licenses and security groups required for two sets of users who have different HP Program Management access grants assigned.

Table 4-3. HP Program Management security group and license scenario

Security Group	Licenses	Definition
Program Manager	• Program Management • Demand Management • Project Management	Corporate program managers who require full access to programs.
Admin Program Mgmt	• Program Management • Demand Management • Project Management	Line managers who only need to view programs.

Associating Security Groups with Workflows

Workflows represent business processes and are used to map business rules and processes to your organization. Each workflow consists of a series of workflow steps. Linked together, these workflow steps form the workflow. With the required access grants, you can edit workflows to meet your business requirements.

> **Note:** To edit workflows, you must have the Configuration system-level license.

You can configure each workflow step so that only security groups or individual users that you specify can process it.
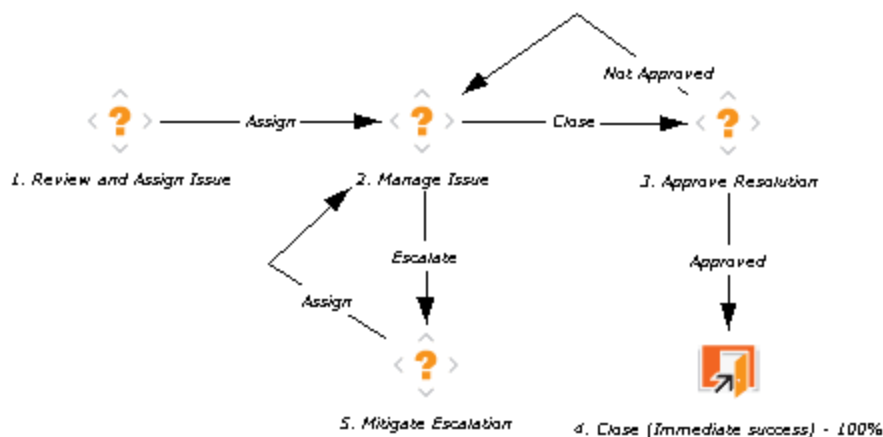
To configure an existing workflow step for a security group:

1. Open the PPM Workbench.

2. From the PPM Workbench shortcut bar, select **Configuration > Workflows.**

   The Workflow Workbench opens.

3. Open an existing workflow.

The Workflow window opens to the **Layout** tab, which you use to configure workflow steps.

4. On the **Layout** tab, double-click a numbered workflow step.

   The Workflow Step window opens to the **Properties** tab, which is used to specify general information about the workflow step.
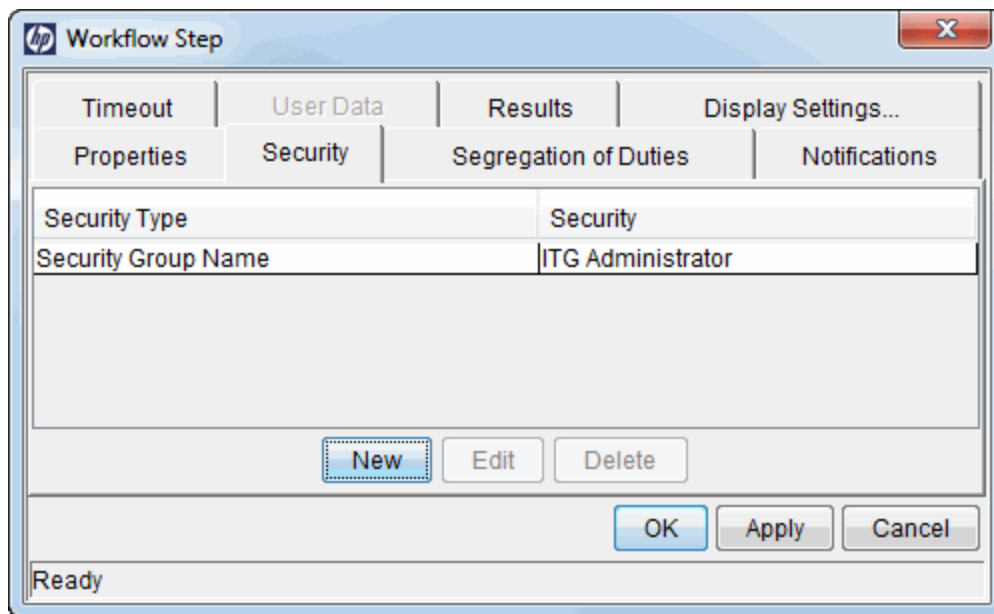
5. Click the **Security** tab.

   > **Note:** You use the **Security** tab to assign security groups and individual users to the workflow step. After you assign a security group to a workflow step, only a member of that security group can act on that step.

6. Click **New.**

   The Workflow Step Security window opens.

7. In the **Security Group** box, use the auto-complete list tool to open the Validate window and select the security group or groups.

8. Click **OK.**

9. In the Workflow Step window, click **OK.**

The **Security** tab lists the security groups added to the workflow step.

10. Click **OK.**

11. To save your changes to the workflow, in the Workflow: <*Workflow Name*> window, click **OK.**

For more information on configuring workflow steps, see the *HP Demand Management Configuration Guide.*

Send Documentation Feedback

If you have comments about this document, you can contact the documentation team by email. If an email client is configured on this system, click the link above and an email window opens with the following information in the subject line:

Feedback on HP Program Management Configuration Guide (Project and Portfolio Management Center 9.30)

Just add your feedback to the email and click send.

If no email client is available, copy the information above to a new message in a web mail client, and send your feedback to HPSW-BTO-PPM-SHIE@hp.com.

We appreciate your feedback!