

HP Project and Portfolio Management Center

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Reports Guide and Reference

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Chapter 1: Getting Started with Project and Portfolio Management Center Reports

- ["Introduction to Project and Portfolio Management Center Reports" below](#)
- ["Related Information" on page 10](#)

Introduction to Project and Portfolio Management Center Reports

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.

Tip: 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. describes how to create and submit report queries, as well as how to access and view the results. ["Report Types" on page 148](#) 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 ["Administrative Reports" on page 28](#).

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 ["Deployment Management Reports" on page 58](#).
- **Demand Management.** These reports are available to users with an HP Demand Management application license and are detailed in ["Demand Management Reports" on page 94](#).
- **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 ["Project Management Reports" on page 130](#).
- **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 ["Project Management Reports" on page 130](#).
- **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 ["Administrative](#)

[Reports" on page 28](#) and ["Time Management Reports" on page 136](#).

- **Time Management.** These reports are available to users with an HP Time Management application license and are detailed in ["Time Management Reports" on page 136](#).
- **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.

- **PPM Operational.** These reports are Excel reports provided for Operational Reporting.

Operational-related reports are included in the *Operational Reporting User's Guide*.

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*.

Chapter 2: Running Reports

- "Reports Menu" below
- "Submitting Reports" on the next page
- "Viewing Previously Submitted Report Results" on page 18
- "Viewing and Cancelling Running Reports" on page 22
- "Deleting Report Results" on page 25

Reports Menu

Use the **Reports** menu in the standard interface (shown in " [Figure 2-1. Reports menu in the standard interface](#)" below) 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

The screenshot displays the HP Project and Portfolio Management Center interface. The top navigation bar includes links for Dashboard, Open, Search, Create, My Links, History, Help, and a star icon. The 'Open' menu is expanded, showing a list of management areas: Demand Management, Project Management, Time Management, Resource Management, Program Management, Portfolio Management, Application Portfolio, Center Management, Financial Management, and Deployment Management. The 'Reports' option is highlighted, and its sub-menu is visible, containing 'My Reports', 'View Reports', and 'Create Report'. The main content area features a table with columns for 'Complete', 'Status', 'Planned Start', and 'Planned Finish'. The table lists several projects, including 'Construct' (October 2011 to January 2012), 'Detailed Project Definition' (January 2012 to September 2012), and 'Detailed Project Definition' (July 2012 to March 2013). A 'Portfolio by Strategic Mix' pie chart is visible on the right, showing segments for 13% and 17%. The bottom of the interface includes an 'Export to Excel' button and a pagination bar showing 'Showing 1 to 5 of 7'.

Complete	Status	Planned Start	Planned Finish
<input checked="" type="checkbox"/>	Construct	October 2011	January 2012
<input type="checkbox"/>	Detailed Project Definition	January 2012	September 2012
<input type="checkbox"/>	Detailed Project Definition	July 2012	March 2013
<input type="checkbox"/>		January 2012	June 2012
<input type="checkbox"/>		January 2012	June 2012

Note: For information about submitting and running PPM Server reports in the PPM Workbench

interface, see the *Installation and Administration Guide*.

Submitting Reports

Note: 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.

Submit New Report

Recently Submitted Reports

Notification History Report	View Notifications that have been sent or are pending
Demand Creation History Report	Demand Creation history by period and by various demand fields. Useful for exporting request data to MS Excel or other data analysis tools.
Project Cost Details	View Cost Details for a Project
Project Cost Breakdown	This Report shows the costs for the Project and the Activities with which the costs are associated. Labor and Non-Labor costs are included in the totals.

Select Report by Category

Report Category:

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."

hp Project and Portfolio Management Center

Submit Report: Request Summary Report

Submit Cancel

Report Parameters Restore Default

Request Numbers:

Request Type:

Status:

Assigned To:

Created By:

Department:

Workflow:

Contact:

Creation Date From:

Last Update Date From:

Description Contains:

Report Title: Request Summary Report

*Group By:

*Include Subtotals for First Group Column: ☒ Yes ☐ No

*Include Closed Requests: ☐ Yes ☒ No

Priority:

Assigned To Group:

Request Sub Type:

Application:

Request Group:

Company Name:

Creation Date To:

Last Update Date To:

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 ["Deployment Management Reports" on page 58](#))

- 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:
 - i. Select **Run Report On**.
 - ii. Provide a valid date (using the field to the right of **Run Report On**).
 - To run the report on a periodic basis:
 - i. Select **Run Report On**.
 - ii. Provide the date when you want the report first run (using the field to the right of **Run Report On**).
 - iii. Select **Repeat Every**.
 - iv. 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:
 - i. Select **Send email to**.
 - ii. 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.

 **Project and Portfolio Management Center**

Edit Advanced Notifications

Add

Cancel

Description:

* Send when Report: ☒ Completes
☒ Fails

Recipients

Send	Type	Recipient
Send:	To	<div>Enter a Username</div> <div></div> <div><div></div><div>Add</div></div>
From:		<div>Enter a Username</div> <div></div> <div><div></div><div></div></div>
Reply To:		<div>Enter a Username</div> <div></div> <div><div></div><div></div></div>

Messages

Notification Template: Standard HTML Message (HTML)

* Subject: [RP.REPORT_TYPE_NAME] [RP.STATUS] on [RP.LAST_UPDATE_DATE]

Message:

<html>
<head>
<title>HP Project and Portfolio Management Notification</title>
<meta http-equiv="Content-Type" content="text/html; charset=iso-8859-1">
</head>
<STYLE TYPE="text/css">
<!--
body {background:#FFFFFF; color:#000000;}
A.link { font-family:Arial, Verdana, sans-serif; font-size: 11px; text-decoration:underline; color:#2E5380;}
A.active { font-family:Arial, Verdana, sans-serif; font-size: 11px; text-decoration:underline; color:#2E5380;}
</-->
</html>

HTML Preview

Add

Cancel

- c. Provide relevant information in this window.
 - d. Click **Add**.
- The Edit Advanced Notifications window closes.
7. Click **Submit**.

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

Project and Portfolio Management Center

Submit Report

Request Summary Report has been successfully submitted.

Start Time: 1/13/13 10:14:53 PM MST

Report #: 31241

Submitted By: Admin User



This window will continue to refresh every 5 seconds until the report finishes.

Status: New

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

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

Tip: 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:
 - i. The Schedule Report window opens.



Schedule Report

Request Summary Report has been successfully saved and scheduled to run.

Next Run Date: 1/15/13 10:20:00 PM MST

Report #: 31244

Submitted By: Admin User

[Edit Report Parameters](#)

- ii. 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](#)" [below](#) 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:** "[Using My Reports](#)" [below](#)
- **View Reports:** "[Using View Reports](#)" [on page 20](#)

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

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

- In the **Report #** column, click the link for the report in the **Report #** column.
 1. In the **View Report #** box, type the report number.
 2. 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.

View Reports

View Report #:

Search for Reports

Report Type:

Report #:

Created By:

Repeating:

Status:

☒ Completed

☒ Failed

☒ Running

☒ Scheduled

☒ All Reports

☐ Scheduled Reports

☒ All Scheduled Reports

☐ Scheduled to run within the next Day(s)

☐ Scheduled to run From: To:

☐ Previous Reports

☒ All Previous Reports

☐ Run within the last Day(s)

☐ Run From: To:

Sort By:

☒ Ascending ☐ Descending

Maximum Results Per Page:

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

- To view the report results, do one of the following:

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

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.

View Running Reports

Summary							
Status as of August 16, 2012 03:54:52 PM CST							
Currently Running: 1 Reports							View Running Executions
Waiting to Run: 0 Reports							
Report Details							
Report #	Report Type	Launched By	Launched Time	Running	Server	Session ID	Process ID
30282	Request Detail Report	Joseph Banks	03:06:21 PM CST	Yes	PPM_TAI...	914	230
							Cancel

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

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

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

Field Name	Description
Summary section	
Currently Running	Provides the number of reports currently running.
Waiting to Run	Number of submitted reports waiting to run. These are not the reports that are scheduled to run. Rather, they are not running because of current load on the system and will run as soon as the current report runs are completed.
Report Details section	
Report #	Report ID.
Report Type	Report name.
Launched By	Full name of the user who submitted the report.
Launched Time	Time at which the report was submitted.
Running	Indicates whether the report is running (Yes) or waiting (No).
Server	Name of the PPM Server running the report.

Field Name	Description
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" below .

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.

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

i. 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.

ii. Click **Delete**.

■ To delete one or more report results:

i. 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.

ii. Click **Delete**.

Chapter 3: Administrative Reports

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- "Data Source Detail Report" on page 31
- "Import Requests Report" on page 32
- "Lookup Types Report" on page 33
- "Notification History Report" on page 33
- "Object Type Detail Report" on page 35
- "Overview Section Detail Report" on page 36
- "Portlet Definition Detail Report" on page 38
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- ["Translation Summary Report" on page 49](#)
- ["User Data Detail Report" on page 50](#)
- ["User Detail Report" on page 50](#)
- ["Validations Report" on page 52](#)
- ["Workflow Detail Report" on page 53](#)
- ["Workflow Statistics Report" on page 55](#)

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

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

Figure 3-1. Contact Synchronization report fields

Report Parameters Restore Default

Create Contacts? ☐ Yes ☒ No

Update Contacts? ☐ Yes ☒ No

Driver: User

Table 3-1. Contact synchronization report field descriptions

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

Data Source Detail Report

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

Figure 3-2. Data Source Detail report fields

Report Parameters

Restore Default

Data Source From:

Data Source To:

*Show Columns?

☒ Yes ☐ No

*Show Filter Fields?

☒ Yes ☐ No

*Show Full Query?

☐ Yes ☒ No

*Show Used By?

☐ Yes ☒ No

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

Report Parameters

Restore Default

Lookup Type From:

Lookup Type To:

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

Report Parameters

Restore Default

Trigger Date From:

Trigger Date To:

*Unsent Notifications Only?

☐ Yes
 ☒ No

Sent on Date From:

Sent on Date To:

Type of Notification Parent:

Request

For a Specific Parent:

Workflow:

Workflow Step:

Email Subject Line Contains:

Sent to Email Address:

Sent to User:

Report Title:

Notification History Report

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.

Table 3-4. Notification History report field descriptions, continued

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

Object Type Detail Report


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


This report is useful for the following:


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

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

Figure 3-5. Object Type Detail report fields

 **Report Parameters**
Restore Default

Object From: 

Object To: 

Object Category: Custom Objects ▼

*Show Parameters? ☐ Yes ☒ No

*Show Commands? ☐ Yes ☒ No

*Expand Special Commands? ☐ Yes ☐ No

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

 **Report Parameters**
Restore Default

Overview Section From:

Overview Section To:

*Show Columns? ☒ Yes ☐ No

*Show Filter Fields? ☒ Yes ☐ No

*Show Full Query? ☐ Yes ☒ No

*Show User Access? ☐ Yes ☒ No

*Show Overview Section URL? ☐ Yes ☒ No

*Show Used By? ☐ Yes ☒ No

*Show Help Content? ☐ Yes ☒ No

Table 3-6. Overview Section Detail report field descriptions

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

Table 3-6. Overview Section Detail report field descriptions, continued

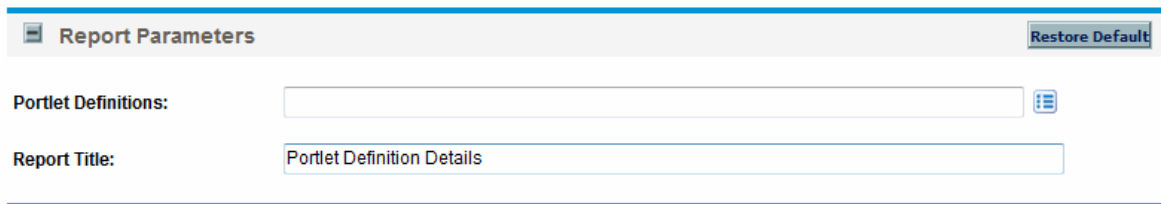
Field Name (*Required)	Description
*Show Used By	Option to show what users rely on these overview pages.
*Show Help Content	Option to show the help content.

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



Report Parameters Restore Default

Portlet Definitions: 

Report Title:

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 effort.

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

The screenshot shows a web interface for the 'Report Parameters' of the 'Purge Empty Time Sheet Lines' report. At the top right is a 'Restore Default' button. The form contains four fields: 1. 'Purge Lines in Time Sheets created before' with a text input field and a help icon. 2. 'Report Only' with radio buttons for 'Yes' and 'No'. 3. 'Work Item Types (blank means all)' with a text input field and a help icon. 4. 'Time Sheet Statuses (blank means all)' with a text input field and a help icon.

Table 3-8. Purge Empty Time Sheet Lines report field descriptions

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.
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. Choices include: <ul style="list-style-type: none">• 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

Report Parameters

Restore Default

Report From:

Report To:

*Show Parameters?

Yes No

*Show Commands?

Yes No

*Expand Special Commands?

Yes No

*Show Security?

Yes No

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

The screenshot shows a web interface for the 'Request Header Type Detail' report. At the top, there is a header bar with a 'Report Parameters' tab and a 'Restore Default' button. Below this, there are two input fields: 'Request Header Type From:' and 'Request Header Type To:'. Each field has a small icon to its right. Below these fields, there is a section for '*Show Filters:' with two radio buttons: 'Yes' and 'No'. The 'No' button is selected.

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

Report Parameters

Restore Default

Request Type From:

Request Type To:

*Show Fields:

☒ Yes
 ☐ No

*Show Statuses

☐ Yes
 ☒ No

*Show Rules

☒ Yes
 ☐ No

*Show Commands

☐ Yes
 ☒ No

*Show Status Dependencies:

☐ Yes
 ☒ No

*Expand Special Commands?

☐ Yes
 ☐ No

*Show Workflows:

☐ Yes
 ☒ No

*Show User Access:

☐ Yes
 ☒ No

*Show Help Content?

☐ Yes
 ☐ No

*Show Default Display Columns:

☐ Yes
 ☐ No

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.

Table 3-11. Request Type Detail report field descriptions, continued

Field Name (*Required)	Description
*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

Report Parameters

Restore Default

Request Type

Request Header Type

User Data Context

Contact

*Entity State

Active

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: <ul style="list-style-type: none">• Active• All• Closed

Run PPM Organization Unit Interface Report

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

To run the PPM Organization Unit Interface report, 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

Report Parameters

Restore Default

User Name:

Security Group:

From:

To:

Show User Security Group Changes?

☒ Yes ☐ No

Show Security Access Grant Changes?

☒ Yes ☐ No

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

Report Parameters

Restore Default

*Workflow:

*Workflow Steps:

*Order By:

Step User Name

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: <ul style="list-style-type: none">• Step User Name• Step Name• Security Group Name

Security Group Detail Report

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

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

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

Figure 3-15. Security Group Detail report fields

Report Parameters

Restore Default

Security Group From:

Security Group To:

User Name:

Workflow Name:

*Show Workflow Steps?

☐ Yes
 ☒ No

*Show Users?

☒ Yes
 ☐ No

*Show Attributes:

☐ Yes
 ☒ No

*Show User Data

☐ Yes
 ☒ No

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

Report Parameters

Restore Default

Special Command From:

Special Command To:

*Show References:

☐ Yes ☒ No

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).

For more information about synchronizing the meta layer, see Synchronizing the Reporting Meta Layer on page 192.

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

Figure 3-17. Synchronize Meta Layer report fields

Report Parameters

Restore Default

*Action:

*Scope:

Entire Meta Layer

View Name:

Template File Name:

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

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

Report Parameters

Restore Default

User Data From:

User Data To:

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.

Note: 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

Report Parameters

Restore Default

Last Name From:

Last Name To:

User:

Security Group:

Organization Unit:

Show Cascading Members?

☐ Yes
 ☒ No

Skill:

Product License:

Access to Workflow:

Include Disabled?

☐ Yes
 ☒ No

Show Resource Information?

☐ Yes
 ☒ No

Show Security?

☐ Yes
 ☒ No

Show Org Units?

☐ Yes
 ☒ No

Show User Data?

☐ Yes
 ☒ No

Report Title:

User Detail Report

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.

Table 3-19. User Detail report field descriptions, continued

Field Name	Description
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

Report Parameters

Restore Default

Validation From:

Validation To:

*Show Validation Values:

☒ Yes

☐ No

*Show Validation Commands?

☐ Yes

☒ No

*Expand Special Commands?

☐ Yes

☒ No

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.

Tip: 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

 **Report Parameters**
Restore Default

Workflow From:

Workflow To:

*Show Valid Results: ☐ Yes ☒ No

*Show Transitions: ☐ Yes ☒ No

*Show Security? ☐ Yes ☒ No

*Show Notifications? ☐ Yes ☒ No

*Show User Data ☐ Yes ☒ No

*Show Subworkflows? ☐ Yes ☒ No

*Show Workflow Step Commands? ☐ Yes ☒ No

*Expand Special Commands? ☐ Yes ☒ No

*Show Filters: ☐ Yes ☒ No

Table 3-21. 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.

Table 3-21. Workflow Detail report field descriptions, continued

Field Name (*Required)	Description
*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

Report Parameters

Restore Default

*Txn Start Date:

*Txn End Date:

*Workflow Scope:

Workflow From:

Workflow To:

*Show Steps:

☒ Yes ☐ No

*Show Transitions:

☐ Yes ☒ No

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.

Chapter 4: Deployment Management Reports

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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


 **Report Parameters**
Restore Default


Comparison Name:


***Reference Environment:** 


Reference AppCode: 


Only Report Differences: ☐ Yes ☐ No


***Object 1:** 


Object 2: 

Object 3: 

Object 4: 

Object 5: 

***Compared Environment:** 

Compared AppCode: 

Object 1 Filter:

Object 2 Filter:

Object 3 Filter:

Object 4 Filter:

Object 5 Filter:

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 4-1. Compare Filesystem Environments report fields


Report Parameters
Restore Default

Comparison Name:

*Reference Environment: 

Reference AppCode: 

*Reference Tier:

Only Report Differences: ☐ Yes ☐ No

Use Entered Base Paths: ☐ Yes ☐ No

Reference Base Path:

Compare Content: ☐ Yes ☐ No

Compare Permissions: ☐ Yes ☐ No


*Directory Choice:


Directory 1:

Directory 2:

Directory 3:

Directory 4:

*Compared Environment: 

Compared AppCode: 

*Compared Tier:

Examine Subdirectories: ☐ Yes ☐ No

Compared Base Path:

Compare Owners: ☐ Yes ☐ No

*File Type Choice:

File Type 1:

File Type 2:

File Type 3:

File Type 4:

Table 4-1. Compare Filesystem Environments report field descriptions

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.

Table 4-1. Compare Filesystem Environments report field descriptions, continued

Field Name (*Required)	Description
*Reference Tier	Select one of the following: <ul style="list-style-type: none"> • Server • Client
*Compared Tier	Select one of the following: <ul style="list-style-type: none"> • Server • Client
Only Report Differences	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.
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: <ul style="list-style-type: none"> • Include All Except. Include all directories except for those specified in Directory 1–4. • Exclude All Except. Exclude all directories except for those specified in Directory 1–4.

Table 4-1. Compare Filesystem Environments report field descriptions, continued

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

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

Compare MS SQL Server 7 Environments Report

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

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

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

The screenshot shows the 'Report Parameters' form for the Compare MS SQL Server 7 Environments report. The form includes a 'Restore Default' button in the top right corner. The parameters are organized into two columns. The left column contains: 'Comparison Name:' with a text input field; '*Reference Environment:' with a text input field and a list icon; 'Reference AppCode:' with a text input field and a list icon; 'Only Report Differences:' with radio buttons for 'Yes' and 'No'; 'Compare Tables:' with radio buttons for 'Yes' and 'No'; 'Compare Views:' with radio buttons for 'Yes' and 'No'; 'Compare Procedures:' with radio buttons for 'Yes' and 'No'; and 'Compare Triggers:' with radio buttons for 'Yes' and 'No'. The right column contains: '*Compared Environment:' with a text input field and a list icon; 'Compared AppCode:' with a text input field and a list icon; 'Table Filter:' with a text input field; 'View Filter:' with a text input field; 'Procedure Filter:' with a text input field; and 'Trigger Filter:' with a text input field.

Table 4-3. Compare MS SQL Server 7 Environments 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


 **Report Parameters**
[Restore Default](#)

Comparison Name:

***Reference Environment:** 

***Compared Environment:** 

Reference AppCode: 

Compared AppCode: 

Only Report Differences: ☐ Yes ☐ No

Compare Tables: ☐ Yes ☐ No

Table Filter:

Compare Sequences: ☐ Yes ☐ No

Sequence Filter:

Compare Indexes: ☐ Yes ☐ No

Index Filter:

Compare Views: ☐ Yes ☐ No

View Filter:

Compare Packages: ☐ Yes ☐ No

Package Filter:

Compare Procedures: ☐ Yes ☐ No

Procedure Filter:

Compare Functions: ☐ Yes ☐ No

Function Filter:

Compare Triggers: ☐ Yes ☐ No

Trigger Filter:

Compare Synonyms: ☐ Yes ☐ No

Synonym Filter:

Compare Grants: ☐ Yes ☐ No

Grant Filter:

Table 4-4. Compare Oracle Environments report field descriptions

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.

Table 4-4. Compare Oracle Environments report field descriptions, continued

Field Name (*Required)	Description
Only Report Differences	Option to display only the differences between the two environments.
Compare Tables	Option to compare tables.
Table Filter	Specify a table. Type any alphanumeric string (up to 200 characters in length).
Compare Sequences	Option to compare sequences.
Sequence Filter	Specify a sequence. Type any alphanumeric string (up to 200 characters in length).
Compare Indexes	Option to compare indexes.
Index Filter	Specify an index. Type any alphanumeric string (up to 200 characters in length).
Compare Views	Option to compare views.
View Filter	Specify a view. Type any alphanumeric string (up to 200 characters in length).
Compare Packages	Option to compare packages.
Package Filter	Specify a package. Type any alphanumeric string (up to 200 characters in length).
Compare Procedures	Option to compare procedures.
Procedure Filter	Specify a procedure. Type any alphanumeric string (up to 200 characters in length).
Compare Functions	Option to compare functions.
Function Filter	Specify a function. Type any alphanumeric string (up to 200 characters in length).
Compare Triggers	Option to compare triggers.
Trigger Filter	Specify a trigger. Type any alphanumeric string (up to 200 characters in length).
Compare Synonyms	Option to compare synonyms.

Table 4-4. Compare Oracle Environments report field descriptions, continued

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

Distribution Detail Report

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

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

Figure 4-5. Distribution Detail report fields

The screenshot shows a web interface for the 'Report Parameters' section. It includes a 'Restore Default' button in the top right. The form contains several input fields and options: 'Distribution From:' and 'Distribution To:' are text boxes with list icons; 'Release:' is a text box with a list icon; 'Transaction Date From:' and 'Transaction Date To:' are text boxes with calendar icons; '*Include Closed Distributions:' has radio buttons for 'Yes' and 'No' (with 'No' selected); '*Show Package Level Subworkflow Steps:' has radio buttons for 'Yes' and 'No' (with 'No' selected); and '*Order By:' is a dropdown menu.

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.

Table 4-5. Distribution Detail report field descriptions, continued

Field Name (*Required)	Description
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 Distributions	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: <ul style="list-style-type: none">• Distribution Name• Release

Environment Comparison Report

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

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

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

Figure 4-6. Environment Comparison report fields

Report Parameters

Restore Default

*Environment 1:

*Environment 2:

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.

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

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

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

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

Report Parameters Restore Default

*Environment Name 1:

*Environment Name 2:

Object Type:

Specific Object:

*Include Matches ☐ Yes ☒ No

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

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

Environment Detail Report

The Environment Detail report Includes the following information:

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

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

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

Figure 4-8. Environment Detail report fields

Report Parameters

Restore Default

*Environment From:

*Environment To:

*Show User Data

Yes

No

*Show Mainframe Parameters?

Yes

No

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

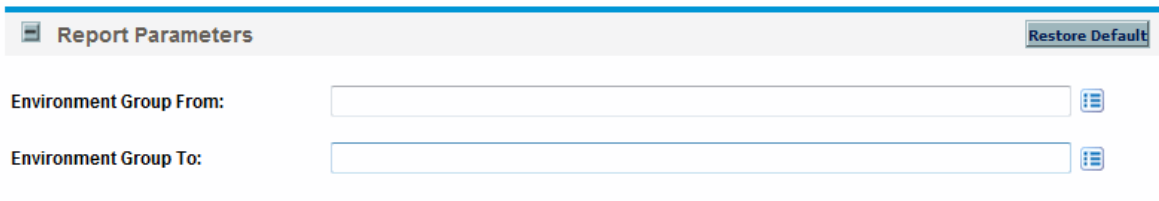
The Environment Group Detail report contains information about the specified environment groups. Users can specify a range of environment groups using the **Environment Group From** and **Environment Group To** fields. The report output includes the following:


- 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



 **Report Parameters** Restore Default

Environment Group From: 


Environment Group To: 

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.

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

Tip: 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

The screenshot shows a web interface for configuring a report. At the top, there is a header bar with a document icon, the text "Report Parameters", and a "Restore Default" button. Below this, the form contains several input fields and a radio button group. The "Environment:" field is a text box with a dropdown icon. The "Object Type:" field is a text box with a dropdown icon. The "Migration Date From:" field is a text box with a calendar icon. The "Migration Date To:" field is a text box with a calendar icon. At the bottom, there is a radio button group for "*Include Prior Migrations" with "Yes" and "No" options, where "No" is selected.

Report Parameters		Restore Default
Environment:	<input type="text"/>	
Object Type:	<input type="text"/>	
Migration Date From:	<input type="text"/>	
Migration Date To:	<input type="text"/>	
*Include Prior Migrations	<input type="radio"/> Yes <input checked="" type="radio"/> No	

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

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

Object History Report

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

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

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

Caution: 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

Report Parameters

Restore Default

Object Type:

Object Name:

Performed By:

Transaction Date From:

Transaction Date To:

Dest. Environment:

*Execution Steps Only?

☐ Yes
 ☒ No

*Order By:

Table 4-11. Object History report field descriptions

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

Objects / Environments Detail Report

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

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

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

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

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

Figure 4-12. Objects / Environments Detail report fields

The screenshot shows a web interface for the 'Report Parameters' of the 'Objects / Environments Detail Report'. At the top, there is a tab labeled 'Report Parameters' and a 'Restore Default' button. Below this, there are four input fields: 'Object Type:', 'Environment:', 'Migration Date From:', and 'Migration Date To:'. Each of these fields has a small icon to its right, likely for opening a selection menu. At the bottom, there is a section for 'Include Prior Migrations' with two radio buttons: 'Yes' and 'No', where 'No' is currently selected.

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

Field Name (*Required)	Description
Object Type	Select an object type from the object types available on your PPM Center instance.
Environment	Select an environment from the environments available on your PPM Center instance.
Migration Date From	Select the starting date. The report will include only migrations started on or after this date.

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

Field Name (*Required)	Description
Migration Date To	Select the ending date. The report will include only migrations started on or before this date.
*Include Prior Migrations	Option to include objects that were migrated to the same environment more than once.

Package Change History Report

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

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

Figure 4-13. Package Change History report

The screenshot displays the 'Report Parameters' configuration window for the Package Change History report. It includes a 'Restore Default' button in the top right corner. The parameters are as follows:

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

Table 4-13. Package Change History 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.

Table 4-13. Package Change History report field descriptions, continued

Field Name (*Required)	Description
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

Report Parameters

Restore Default

Comparison Name:

*Reference Environment:

*Compared Environment:

Reference AppCode:

Compared AppCode:

Only Report Differences:

☐ Yes
 ☐ No

*Object 1:

Object 1 Filter:

Object 2:

Object 2 Filter:

Object 3:

Object 3 Filter:

Object 4:

Object 4 Filter:

Object 5:

Object 5 Filter:

Table 4-14. Package Details 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).
*Include Closed Packages	Option to include packages with an overall status of Cancelled, Closed [Success], Closed [Failure], and Closed [Mixed].
Requested By	Select a user from the users on your PPM Center instance.
*Show Line Statuses	Option to show the workflow steps and current step status for each package line.

Table 4-14. Package Details report field descriptions, continued

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

Package History Report

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

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

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

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

Figure 4-15. Package History report fields

Report Parameters

Restore Default

Package From:

Package To:

Package No. Contains:

Requested By:

Assigned To:

*Include Closed Packages:

Yes

No

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

Report Parameters

Restore Default

*Package:

Ignore Pkgs Created Before:

*Show Details:

Yes

No

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

Report Parameters

Restore Default

Package From:

Package To:

Executable by User:

Executable by Sec Group:

Assigned to User:

Assigned to Sec Group:

Workflow:

Dest Environment:

*Execution Steps Only:

☐ Yes ☒ No

*Filter For:

*Order By:

Table 4-17. Packages Pending report field descriptions

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.

Table 4-17. Packages Pending report field descriptions, continued

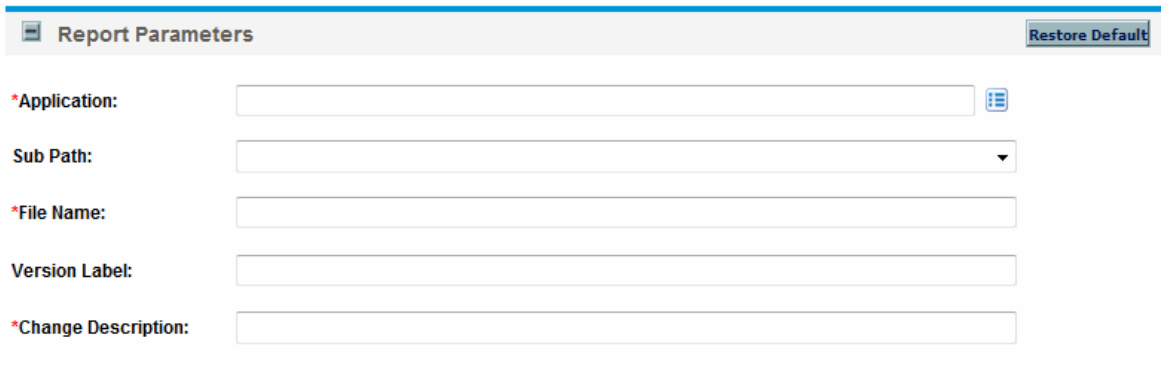
Field Name (*Required)	Description
Assigned to User	Select a user from the users on your PPM Center instance.
Assigned to Sec Group	Select a security group from the security groups available on your PPM Center instance.
Workflow	Select a workflow from the workflows available on your PPM Center instance.
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.
*Filter For	Select a filter. Choices include: <ul style="list-style-type: none"> • All Active Steps • Eligible Steps Only • Scheduled Steps Only
*Order By	Select the sort criteria. Choices include: <ul style="list-style-type: none"> • Package Number • Step name • Workflow Name

RCS Check In Report

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

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

Figure 4-18. RCS Check In report fields



The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains five input fields, each with a red asterisk indicating it is required:

- *Application:** A text input field with a small icon of a list with a plus sign to its right.
- Sub Path:** A dropdown menu.
- *File Name:** A text input field.
- Version Label:** A text input field.
- *Change Description:** A text input field.

Table 4-18. RCS Check In report field descriptions


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

RCS Check Out Report

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

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

Figure 4-19. RCS Check Out report fields



Report Parameters Restore Default

*Application:

Path:

*File Name:

Version Label / Revision #:

Lock? ☒ Yes ☐ No

Read-Only? ☐ Yes ☒ No

Table 4-19. RCS Check Out report field descriptions

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

Tip: 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

Report Parameters

Restore Default

Release From:

*Show Distributions:

☒ Yes

☐ No

Release To:

*Show Packages:

☒ Yes

☐ No

Release Contains:

*Show Requests:

☒ Yes

☐ No

Created By:

*Show References:

☐ Yes

☒ No

Release Manager:

*Show Notes:

☒ Yes

☐ No

Release Team:

*Include Closed Releases:

☐ Yes

☒ No

Package Group:

Description:

Creation Date From:

Creation Date To:

Dist. Creation Date From:

Dist. Creation Date To:

Table 4-20. Release Detail report field descriptions

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.

Table 4-20. Release Detail report field descriptions, continued

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

Tip: 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

Report Parameters

Restore Default

Release From:

Show Requests:

☒ Yes

☐ No

Release To:

Show Packages:

☒ Yes

☐ No

Release Manager:

Show Notes:

☒ Yes

☐ No

Release Team:

Update Date From:

Update Date To:

*Include Closed Distributions:

☐ Yes

☒ No

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.

Table 4-21. Release Notes report field descriptions, continued

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

Chapter 5: Demand Management Reports

- "ALM - Change Summary Report" below
- "ALM - Forward Schedule of Changes for RFC Report" on the next page
- "ALM - Forward Schedule of Releases Report" on page 96
- "ALM - Release Content Report" on page 96
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- "Request Summary (Filter by Custom Fields) Report" on page 118
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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

Report Parameters

Restore Default

Request Type

MAC - Request For Change (RFC)

Change Status

Change Priority

Time Period From

Time Period To

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

Report Parameters

Restore Default

Report Title

Forward Schedule of Changes (FSC)

Start FSC period

End FSC Period

Request Type

MAC - Release Management

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

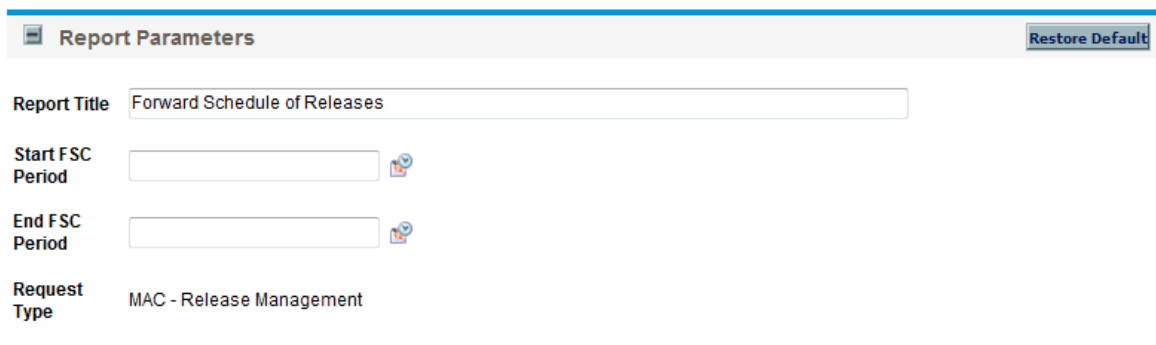
Field Name	Description
Report Title	Title of the report
Start FSC Period	Earliest start date of the scheduled RFCs
End FSC Period	Latest start date of the scheduled RFCs
Request Type	Request type to filter on

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



The screenshot shows the 'Report Parameters' section of the ALM - Forward Schedule of Releases report. It includes a 'Report Title' field with the value 'Forward Schedule of Releases', 'Start FSC Period' and 'End FSC Period' date pickers, and a 'Request Type' dropdown menu currently set to 'MAC - Release Management'. A 'Restore Default' button is located in the top right corner of the parameters section.

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

Report Parameters

Restore Default

Report Title

Release content Report

Request Type

MAC - Release Management

*Release ID

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

Report Parameters

Restore Default

Request Type

MAC - Release Management

Release Status

Release Type

Time Period From

Time Period To

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

Field Name	Description
Request Type	Request type to filter on

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

Field Name	Description
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

The screenshot shows a web interface for the 'Report Parameters' of the 'Contact Detail' report. The interface has a title bar with a report icon and the text 'Report Parameters', and a 'Restore Default' button on the right. Below the title bar, there are six input fields with labels: 'Last Name From:', 'Last Name To:', 'Full Name Contains:', 'Email Contains:', 'Company Name:', and 'Report Title:'. The 'Report Title' field is pre-filled with the text 'Contact Details'. The 'Company Name' field has a small icon to its right. The form is enclosed in a light gray border with a blue header bar.

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).

Table 5-6. Contact Detail report field descriptions, continued

Field Name	Description
Full Name Contains	Specify a string that must be included in the full name. Type any alphanumeric string (up to 200 characters in length).
Email Contains	Specify a string that must be included in the email address. Type any alphanumeric string (up to 200 characters in length).
Company Name	Specify one or more companies from the companies available on your PPM Center instance.
Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).

Demand Creation History Report

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

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

Figure 5-7. Demand Creation History report fields

Report Parameters

Restore Default

*Report Title:

Demand Creation History

*Demand Set Name:

Request Type:

Requestor Department:

Priority:

Assigned to Group:

Demand Disposition:

Application:

*Demand Grouped By:

*Period Type:

Month

*Past Periods:

3

Demand Field 1:

Field Value 1:

Demand Field 2:

Field Value 2:

Demand Field 3:

Field Value 3:

Demand Field 4:

Field Value 4:

Demand Field 5:

Field Value 5:

Table 5-7. Demand Creation History report field descriptions

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.

Table 5-7. Demand Creation History report field descriptions, continued

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

Report Parameters

Restore Default

*Report Title:

Historical SLA Violations

*Demand Set Name:

Request Type:

Requestor Department:

Priority:

Assigned to Group:

Demand Disposition:

Application:

*Demand Grouped By:

*Period Type:

Month

*Past Periods:

3

Demand Field 1:

Field Value 1:

Demand Field 2:

Field Value 2:

Demand Field 3:

Field Value 3:

Demand Field 4:

Field Value 4:

Demand Field 5:

Field Value 5:

Table 5-8. Historical SLA Violations report field descriptions

Field Name (*Required)	Description
*Report Title	Specify a unique name for the report. Type any alphanumeric string (up to 200 characters in length).

Table 5-8. Historical SLA Violations report field descriptions, continued

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

Table 5-8. Historical SLA Violations report field descriptions, continued

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

Report Parameters

Restore Default

Request Numbers:

*Request Type:

Status:

Assigned To:

Created By:

Department:

Workflow:

Contact:

Creation Date From:

Last Update Date From:

Description Contains:

Field Prompt 1:

Field Prompt 2:

Field Prompt 3:

Field Prompt 4:

Report Title:

Request Detail (Filter by Custom Fi

*Show Header Fields:

Yes

No

*Hide Prompts for Empty Fields:

Yes

No

*Show Field Audit History:

Yes

No

*Show Notes:

Yes

No

*Show Status:

Yes

No

*Include Closed Requests:

Yes

No

Priority:

Assigned To Group:

Request Sub Type:

Application:

Request Group:

Company Name:

Creation Date To:

Last Update Date To:

Field Value 1:

Field Value 2:

Field Value 3:

Field Value 4:

*Order By:

Request Number

*Show Detail Fields:

Yes

No

*Show Contents of Table Fields:

Yes

No

*Filter Notes:

Show all notes

*Show References:

Yes

No

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

Field Name (*Required)	Description
Request Numbers	Select one or more request numbers from the request numbers available on your PPM Center instance.

Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions, continued

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

Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions, continued

Field Name (*Required)	Description
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).
*Order By	<p>Select the sort criteria. Choices include:</p> <ul style="list-style-type: none"> • Request Number • Application • Assigned To • Created By • Creation Date • Department • Last Updated Date • Priority • Request Group • Request Sub Type • Request Type • Status

Table 5-9. Request Detail (Filter by Custom Fields) report field descriptions, continued

Field Name (*Required)	Description
*Show Header Fields	Option to show header fields.
*Show Detail Fields	Option to show details (custom fields).
*Hide Prompts For Empty Fields	Option to hide prompts for empty fields.
*Show Contents of Table Fields	Option to show the contents of table component fields.
*Show Field Audit History	Option to show the transaction history.
*Show Notes	Option to show notes.
*Filter Notes	Indicate the scope of the notes. Choices include: <ul style="list-style-type: none">• Show all notes• Show only user notes
*Show Status	Option to show workflow steps and their current status.
*Show References	Option to show references.

Request Detail Report

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

- All notes attached to the request
- Current status of the request

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

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

Figure 5-10. Request Detail report fields

Report Parameters

Restore Default

Request Numbers:	<input type="text"/>		*Include Closed Requests:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Request Type:	<input type="text"/>			
Status:	<input type="text"/>		Priority:	<input type="text"/>
Assigned To:	<input type="text"/>		Assigned To Group:	<input type="text"/>
Created By:	<input type="text"/>		Request Sub Type:	<input type="text"/>
Department:	<input type="text"/>		Application:	<input type="text"/>
Workflow:	<input type="text"/>		Request Group:	<input type="text"/>
Contact:	<input type="text"/>		Company Name:	<input type="text"/>
Creation Date From:	<input type="text"/>		Creation Date To:	<input type="text"/>
Last Update Date From:	<input type="text"/>		Last Update Date To:	<input type="text"/>
Description Contains:	<input type="text"/>			
Report Title:	<input type="text" value="Request Detail Report"/>			*Order By:
				<input type="text" value="Request Number"/>
*Show Header Fields:	<input checked="" type="radio"/> Yes <input type="radio"/> No	*Show Detail Fields:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
*Hide Prompts for Empty Fields:	<input checked="" type="radio"/> Yes <input type="radio"/> No	*Show Contents of Table Fields:	<input type="radio"/> Yes <input checked="" type="radio"/> No	
*Show Field Audit History:	<input type="radio"/> Yes <input checked="" type="radio"/> No	*Filter Notes:	<input type="text" value="Show all notes"/>	
*Show Notes:	<input checked="" type="radio"/> Yes <input type="radio"/> No	*Show References:	<input checked="" type="radio"/> Yes <input type="radio"/> No	
*Show Status:	<input checked="" type="radio"/> Yes <input type="radio"/> No			

Table 5-10. Request Detail report field descriptions

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.
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

Table 5-10. Request Detail report field descriptions, continued

Field Name (*Required)	Description
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	<p>Select the sort criteria. Choices include:</p> <ul style="list-style-type: none"> • Request Number • Application • Assigned To • Created By • Creation Date • Department • Last Updated Date • Priority • Request Group • Request Sub Type • Request Type • Status
*Show Header Fields	Option to show the header field
*Show Detail Fields	Option to show details (custom fields).
*Hide Prompts for Empty Fields	Option to hide the prompts for empty fields.

Table 5-10. Request Detail report field descriptions, continued

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

Request History Report

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

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

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

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

Figure 5-11. Request History report fields

Report Parameters
[Restore Default](#)

Request Numbers:

Request Type:

Status:

Assigned To:

Created By:

Department:

Workflow:

Contact:

Creation Date From:

Last Update Date From:

Description Contains:

Report Title:

***Include Closed Requests:** ☐ Yes ☒ No

Priority:

Assigned To Group:

Request Sub Type:

Application:

Request Group:

Company Name:

Creation Date To:

Last Update Date To:

***Order By:**

Table 5-11. Request History report field descriptions

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.

Table 5-11. Request History report field descriptions, continued

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

Table 5-11. Request History report field descriptions, continued

Field Name (*Required)	Description
*Order By	Select the sort criteria. Choices include: <ul style="list-style-type: none">• Application• Assigned To• Created By• Creation Date• Department• Last Updated Date• Priority• Request Group• Request Number• Request Type• Request Sub Type• Status

Request Quick View Report

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

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

Figure 5-12. Request Quick View report fields

Report Parameters

Restore Default

Request Numbers:

Request Type:

Status:

Assigned To:

Created By:

Department:

Workflow:

Contact:

Creation Date From:

Last Update Date From:

Description Contains:

Report Title:

Request Quick View

Show Details:

☒ Yes ☐ No

Show Summary:

☒ Yes ☐ No

*Columns to Display (8 max):

Request No.; Description; Rec

Include Closed Requests:

☐ Yes ☒ No

Priority:

Assigned To Group:

Request Sub Type:

Application:

Request Group:

Company Name:

Creation Date To:

Last Update Date To:

*Order By:

Request Number

Table 5-12. Request Quick View report field descriptions

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.

Table 5-12. Request Quick View report field descriptions, continued

Field Name (*Required)	Description
Assigned To	Select one or more users from the users on your PPM Center instance.
Assigned To Group	Select one or more security groups from the security groups available on your PPM Center instance.
Created By	Select one or more users from the users on your PPM Center instance.
Request Sub Type	Select one or more subtypes of the specified Request 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.
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).

Table 5-12. Request Quick View report field descriptions, continued

Field Name (*Required)	Description
*Order By	Select the sort criteria: Choices include: <ul style="list-style-type: none">• Request Number• Created By• Creation Date• Priority• Request Type• Status• Description• Assigned User
*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

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:

Field Prompt 1:

Field Value 1:

Field Prompt 2:

Field Value 2:

Field Prompt 3:

Field Value 3:

Field Prompt 4:

Field Value 4:

Report Title:

Request Summary (Filter by Custor

*Group By:

*Include Subtotals for First Group Column:

☒ Yes
 ☐ No

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

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.

Table 5-13. Request Summary (Filter by Custom Fields) report field descriptions, continued

Field Name (*Required)	Description
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.
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.

Table 5-13. Request Summary (Filter by Custom Fields) report field descriptions, continued

Field Name (*Required)	Description
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, continued

Field Name (*Required)	Description
*Group By	<p>Select one or more sort criteria. Choices include:</p> <ul style="list-style-type: none"> • Assigned Group • Assigned User • Company Name • Contact Email • Contact Name • Contact Phone • Created By • Created On • Department • Description • Last Updated On • Application • Priority • Request Group • Request Number • Request Sub Type • Request Type • Status • Days Open • Workflow • Percent Complete
*Include Subtotals for First Group Column	Option to include subtotals for the first group.

Request Summary Report

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

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

Figure 5-14. Request Summary report fields

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

Table 5-14. Request Summary report field descriptions

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.

Table 5-14. Request Summary report field descriptions, continued

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

Table 5-14. Request Summary report field descriptions, continued

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

Table 5-14. Request Summary report field descriptions, continued


Field Name (*Required)	Description
*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



Report Parameters
Restore Default


*Report Title:


*Demand Set Name: 


Request Type: 


Priority: 


Demand Disposition: 


*Demand Grouped By: 


*Period Type: 


*Past Periods: 


Demand Field 1: 


Demand Field 2: 


Demand Field 3: 

Demand Field 4: 

Demand Field 5: 

Requestor Department: 

Assigned to Group: 

Application: 

Field Value 1:

Field Value 2:

Field Value 3:

Field Value 4:

Field Value 5:

Table 5-15. Satisfied Demand History report field descriptions

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: <ul style="list-style-type: none"> • Low • Normal • High • Critical
Assigned to Group	Select one or more security groups from the security groups available on your PPM Center instance.
Demand Disposition	Read-only field.
Application	Select one or more applications from the applications available on your PPM Center instance.
Demand Grouped By	Select a demand set grouping from those demand fields available on your PPM Center instance.
Period Type	Specify the time period. Choices include: <ul style="list-style-type: none"> • Months • Weeks
Past Periods	Specify the number of historic periods of Period Type . Type any integer (in the range of -9,999,999,999 to 9,999,999,999 and without a comma separator).
Demand Field 1–5	Select these demand fields from those demand fields available on your PPM Center instance.

Table 5-15. Satisfied Demand History report field descriptions, continued

Field Name (*Required)	Description
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.

Chapter 6: Project Management Reports

- ["Baseline Comparison Report" below](#)
- ["Project Cost Breakdown Report" on page 132](#)
- ["Project Cost Details Report" on page 133](#)

Baseline Comparison Report

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

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

Figure 6-1. Baseline Comparison report fields

The screenshot shows a web form titled "Report Parameters" with a "Restore Default" button in the top right corner. The form contains several input fields and radio button options for configuring the report. The fields are as follows:

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

Table 6-1. Baseline Comparison report field descriptions

Field Name (*Required)	Description
*Project	Select a project from the projects available on your PPM Center instance.
*Compare	Select a baseline or work plan for this project from those work plans or baselines available on your PPM Center instance.
*To	Select another baseline or work plan for this project from the projects or baselines available on your PPM Center instance.
Show Only Changes	Option to show changes only. Use this when you want to view only the differences between the entities.
Show Only Summary Tasks	Option to show summary tasks only.
Show Start Date Changes	Option to show changes in task start dates.
Show Finish Date Changes	Option to show changes in task finish dates.
Show Duration Changes	Option to show changes in task durations.
Show Effort Changes	Option to show changes in task effort.
Only Indicate Changes Later Than(days)	Specify the number of days that should be ignored. That is, changes smaller than the specified amount will not be shown. Type any integer (in the range of –999 to 9,999 and without a comma separator).
Show Cost Changes For	Select one or more cost categories. Choices include: <ul style="list-style-type: none"> • Planned Labor • Planned Non-Labor • Planned Cost • Planned Capital Cost • Planned Operating Cost
Only Indicate Cost Changes Larger Than	Specify the minimum cost changes to report upon. Type any integer (in the range of –999 to 9,9999 and without a comma separator).

Table 6-1. Baseline Comparison report field descriptions, continued

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

Project Cost Breakdown Report

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

Note: 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

The screenshot shows the 'Report Parameters' form for the Project Cost Breakdown report. It includes a 'Restore Default' button in the top right. The form contains the following fields: a required text field for '*Project' with a selection icon; a required dropdown for '*Breakdown Period' currently set to 'Project to Date'; a text field for 'Period' with a selection icon; and radio buttons for 'Local Currency' with 'Yes' selected and 'No' unselected.

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.

Table 6-2. Project Cost Breakdown report field descriptions, continued

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

Project Cost Details Report

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

Note: 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

The screenshot shows the 'Report Parameters' form for the Project Cost Details report. It includes fields for 'Project Name', 'Project Manager', and 'Limit Hierarchy Depth to:'. Below these are two radio button options: 'Group costs by Capital and Operating' (with 'Yes' selected) and 'Local Currency' (with 'Yes' selected). A 'Restore Default' button is located in the top right corner.

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.

Table 6-3. Project Cost Details report field descriptions, continued

Field Name	Description
Limit Hierarchy Depth to	<p>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.</p> <p>A depth of 1 will show costs at the work plan level.</p>
Group costs by Capital and Operating	<p>Option to select if the costs should be grouped as capital and operating. Choices include:</p> <ul style="list-style-type: none">• Yes. Costs are grouped as capital or operating.• No. Costs are grouped as labor and non-labor.
Local Currency	<p>Option to select if the costs should be displayed in local currency or in the PPM Center system base currency. Choices include:</p> <ul style="list-style-type: none">• Yes. Costs are displayed in local currency.• No. Costs are displayed in the PPM Center system base currency.

Chapter 7: Time Management Reports

- ["Actual Time Summary Report" below](#)
- ["Delinquent Time Sheets Report" on page 138](#)
- ["Time Sheet Details Report" on page 140](#)
- ["Time Sheet Summary Report" on page 142](#)
- ["Work Allocation Details Report" on page 145](#)

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.

Tip: 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

Report Parameters

Restore Default

*Group By:

*Period Type:

Weekly

Resource:

*Starting Time Period:

Resource Group:

*Ending Time Period:

Direct Manager:

Work Item Type:

Work Item Set:

Show Groups with Actual Hours Greater Than or Equal To:

Work Item:

Include Unsubmitted Time Sheets:

☒ Yes
 ☐ No

Activity:

Show Subtotals:

☐ Yes
 ☒ No

Charge Code:

Show Actual Cost:

☒ Yes
 ☐ No

Table 7-1. Actual Time Summary report field descriptions

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

Table 7-1. Actual Time Summary report field descriptions, continued

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

Delinquent Time Sheets 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

Report Parameters

Restore Default

*Previous Time Periods to Show:

3

*Include Current Period:

☐ Yes
 ☒ No

*Grace Period in Days (affects past periods only):

Resource:

Resource Category:

Direct Manager:

Default Time Approver:

Project Name:

Program Name:

M&E Requests:

M&E Details Requests:

Business Unit:

Group:

Time Sheet Status:

Sort by:

Period

*Include Disabled Accounts:

☐ Yes
 ☒ No

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.

Table 7-2. Delinquent Time Sheets report field descriptions, continued

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

Report Parameters

Restore Default

*Period Type:

Weekly

*Time Period:

Resource:

Resource Group:

Description Contains:

Report Title:

Time Sheet Detail Report

*Show Time Sheet Notes:

☐ Yes
 ☒ No

*Show Charge Codes:

☐ Yes
 ☒ No

*Include Frozen and Closed:

☒ Yes
 ☐ No

*Include Cancelled:

☐ Yes
 ☒ No

Direct Manager:

Status:

Time Sheet #

*Order By:

Time Period, Resource

*Show Line Notes:

☐ Yes
 ☒ No

*Show Activity Details:

☐ Yes
 ☒ No

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).

Table 7-3. Time Sheet Details report field descriptions, continued

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

Note: 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

Report Parameters

Restore Default

*Group By:

*Period Type:

Weekly

Starting Time Period:

Resource:

Ending Time Period:

Resource Group:

*Current Plus Last X Periods:

Direct Manager:

Work Item Type:

Time Sheet #:

Work Item Set:

Include Closed Time Sheets:

☒ Yes

☐ No

Work Item:

Include Unsubmitted Time Sheets:

☒ Yes

☐ No

Activity:

Charge Code:

Show Actual Cost:

☐ Yes

☒ No

Table 7-4. Time Sheet Summary report field descriptions

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

Table 7-4. Time Sheet Summary report field descriptions, continued

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

Work Allocation Details Report

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

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

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

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

Note: This report also appears in the Resource Management category.

Figure 7-5. Work Allocation Details report fields

Report Parameters

Restore Default

Work Item Type:

Work Item Set:

Work Item:

Charge Code:

Creation Date From:

Creation Date To:

Actuals/Budget Over X%:

Include Closed:

☐ Yes
 ☒ No

Show Resource Restrictions:

☐ Yes
 ☒ No

Show Detailed Actuals:

☐ Yes
 ☒ No

Show Discounts:

☐ Yes
 ☒ No

*Sort By:

Work Item Type

Table 7-5. Work Allocation Details report field descriptions

Field Name (*Required)	Description
Work Item Type	<p>Select a work item type. Choices include:</p> <ul style="list-style-type: none"> • Request • Package • Task • Misc
Work Item Set	Select a work item set from the work item sets available on your PPM Center instance.
Work Item	Specify a work item from the work items available on your PPM Center instance.
Charge Code	Select a charge code from the charge codes available on your PPM Center instance.
Creation Date From	Select the starting creation date. The report will include only work allocations created on or after this date.

Table 7-5. Work Allocation Details report field descriptions, continued

Field Name (*Required)	Description
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.
Show Discounts	Option to include the standard and billing discounts.
*Sort By	<p>Select the sort criteria. Choices include:</p> <ul style="list-style-type: none"> • Work Item Type • Work Item Set • Work Item • Original Budget (Hrs) • Current Budget (Hrs)

Chapter 8: Report Types

- ["Overview of the Report Type Workbench" below](#)
- ["Using the Report Type Workbench" below](#)
- ["Report Type Windows" on page 153](#)

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

Caution: 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" on the next page](#)
- ["Creating an Entirely New Report Type" on page 150](#)
- ["Creating a New Report Type From an Existing Report Type" on page 150](#)
- ["Modifying an Existing Report Type" on page 152](#)

Logging On

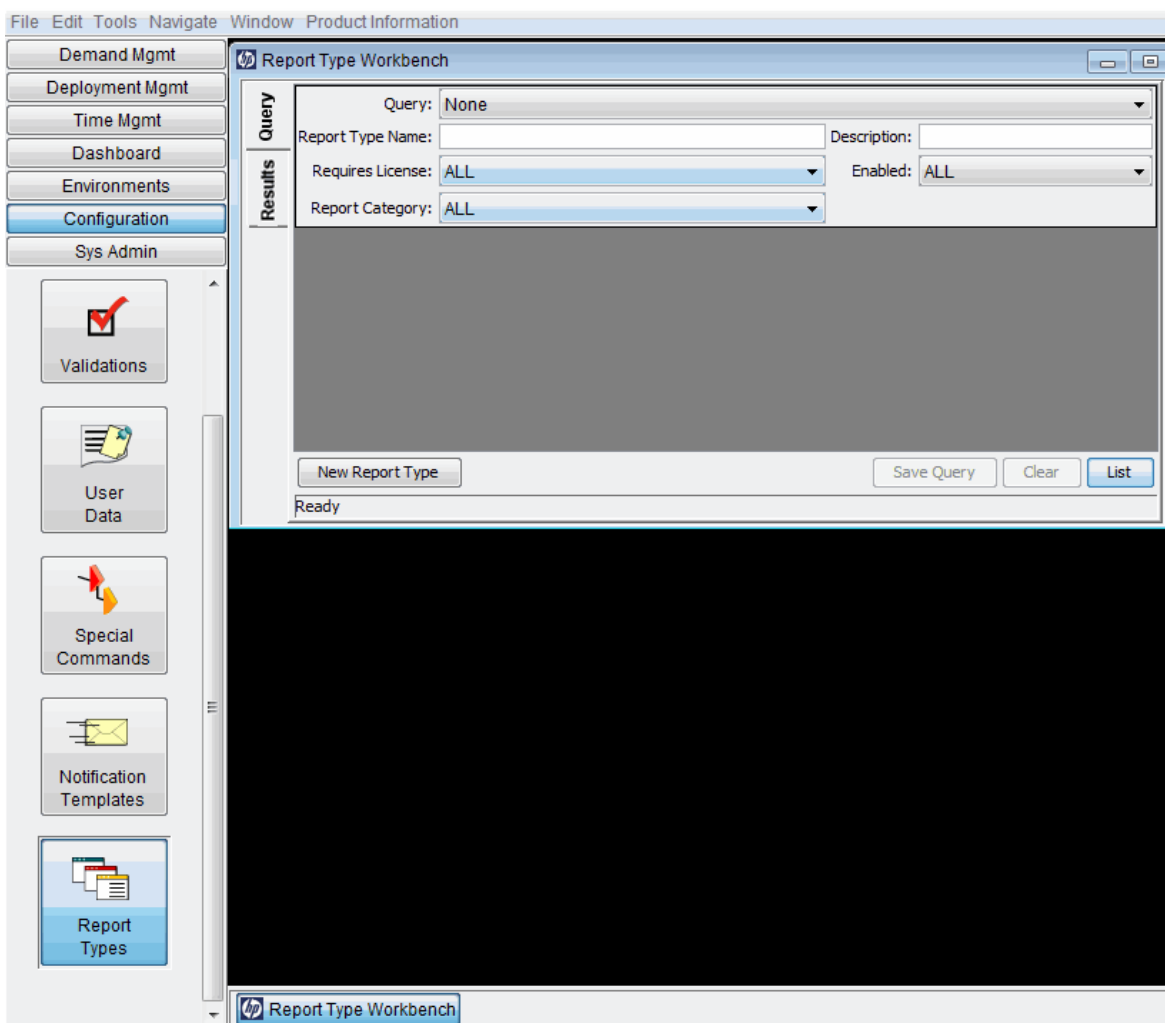
To access the Report Type Workbench:

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

The PPM Workbench opens.

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

The Report Type Workbench opens.



Creating an Entirely New Report Type

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

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

The Report Type window opens.

The screenshot shows the 'Report Type' dialog box. It has a title bar with the HP logo and the text 'Report Type'. Below the title bar are several input fields: 'Report Type Name:', 'Reference Code:', 'Description:', 'Requires License:' (with a dropdown menu set to 'Any'), 'Report Category:' (with a list icon), and 'Enabled:' (with radio buttons for 'Yes' and 'No', where 'Yes' is selected). Below these fields are tabs for 'Fields', 'Layout', 'Commands', 'Security', and 'Ownership'. The 'Fields' tab is selected, showing a table with the following columns: 'Pro...', 'To...', 'Parameter Col.', 'Display...', 'Component T...', 'Validation', 'Requir...', and 'Display Only'. The table is currently empty. At the bottom of the dialog are buttons for 'New', 'Edit', and 'Remove'. At the very bottom are buttons for 'OK', 'Save', and 'Cancel'. The status bar at the bottom left says 'Ready'.

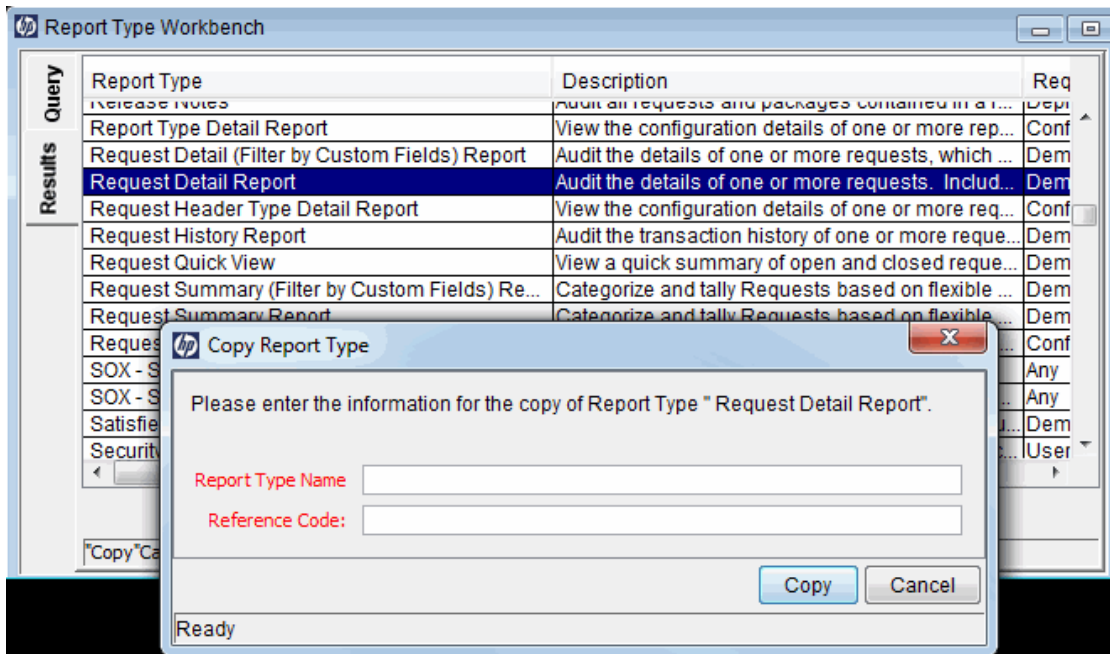
2. Configure the settings using the information provided in ["Report Type Windows" on page 153](#).

Creating a New Report Type From an Existing Report Type

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

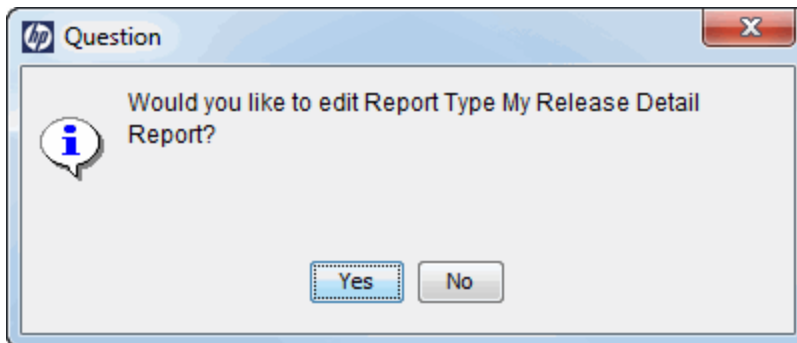
1. From the Report Type Workbench, select the existing report type.
2. Click **Copy**.

The Copy Report Type window opens.



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

If you continued, the Question window opens.



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

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

Report Type : My Release Detail Report

Report Type Name: My Release Detail Report

Reference Code: MY_RELEASE_DETAIL_REPORT

Description: or more requests. Includes header and detail information, notes, and status for each selected request.

Requires License: Demand Management Enabled: ☒ Yes ☐ No

Report Category: Demand Management

Fields | Layout | Commands | Security | Ownership

Prompt	Token	Parameter Col.	Display...	Component Type
Application:	P_MODULE	PARAMETER12	Y	Auto Complete L
Assigned To:	P_ASSGN_USER	PARAMETER5	Y	Auto Complete L
Assigned To Group:	P_SEC_GROUP	PARAMETER6	Y	Auto Complete L
Company Name:	P_COMPANY_NAME	PARAMETER17	Y	Auto Complete L
Contact:	P_CONTACT	PARAMETER15	Y	Auto Complete L
Created By:	P_CREATED_BY	PARAMETER7	Y	Auto Complete L

New Edit Remove

OK Save Cancel

Ready

6. View or modify the settings using the information provided in ["Report Type Windows" on the next page](#).

Modifying an Existing Report Type

To update an existing report type:

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

The Report Type: <Report> window opens.

Report Type : My Release Detail Report

Report Type Name: My Release Detail Report

Reference Code: MY_RELEASE_DETAIL_REPORT

Description: or more requests. Includes header and detail information, notes, and status for each selected request.

Requires License: Demand Management Enabled: ☒ Yes ☐ No

Report Category: Demand Management

Fields | Layout | Commands | Security | Ownership

Prompt	Token	Parameter Col.	Display...	Component Type
Application:	P_MODULE	PARAMETER12	Y	Auto Complete L
Assigned To:	P_ASSGN_USER	PARAMETER5	Y	Auto Complete L
Assigned To Group:	P_SEC_GROUP	PARAMETER6	Y	Auto Complete L
Company Name:	P_COMPANY_NAME	PARAMETER17	Y	Auto Complete L
Contact:	P_CONTACT	PARAMETER15	Y	Auto Complete L
Created By:	P_CREATED_BY	PARAMETER7	Y	Auto Complete L

New Edit Remove

OK Save Cancel

Ready

3. View or modify the settings using the information provided in ["Report Type Windows"](#) below.

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. Report Type window general information fields descriptions" below](#).

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. Field window" on page 156](#)). Select any existing field to modify its settings, or click **New** to create a new field.

Figure 8-1. Report Type window Fields tab

Report Type : My Release Detail Report

Report Type Name: My Release Detail Report

Reference Code: MY_RELEASE_DETAIL_REPORT

Description: or more requests. Includes header and detail information, notes, and status for each selected request.

Requires License: Demand Management

Enabled: ☒ Yes ☐ No

Report Category: Demand Management

Fields

Layout

Commands

Security

Ownership

Prompt	Token	Parameter Col.	Display...	Component Typ
Application:	P_MODULE	PARAMETER12	Y	Auto Complete L
Assigned To:	P_ASSGN_USER	PARAMETER5	Y	Auto Complete L
Assigned To Group:	P_SEC_GROUP	PARAMETER6	Y	Auto Complete L
Company Name:	P_COMPANY_NAME	PARAMETER17	Y	Auto Complete L
Contact:	P_CONTACT	PARAMETER15	Y	Auto Complete L
Created By:	P_CREATED_BY	PARAMETER7	Y	Auto Complete L

New

Edit

Remove

OK

Save

Cancel

Ready

Figure 8-2. Field window

Field: New

Field Prompt: Token:

Description:

Enabled: ☒ Yes ☐ No

Validation:

Component Type:

Multiselect: ☐ Yes ☒ No

Attributes | Default | Dependencies

Parameter Col.: Display Only:

Display: ☒ Yes ☐ No Required:

Ready

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. Field window general information field descriptions"](#) on the next page.

Table 8-2. Field window general information field descriptions

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.
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. Field window Attributes tab field descriptions](#)" on the next page.

Figure 8-3. Field window Attributes tab

The screenshot shows the 'Field: New' dialog box with the 'Attributes' tab selected. The 'Field Prompt' and 'Token' fields are empty. The 'Description' field is also empty. The 'Enabled' radio buttons are set to 'Yes'. The 'Validation' field is empty, with 'New' and 'Open' buttons below it. The 'Component Type' dropdown is set to 'None'. The 'Multiselect' radio buttons are set to 'No'. The 'Parameter Col.' dropdown is set to 'PARAMETER19'. The 'Display Only' dropdown is set to 'Never'. The 'Display' radio buttons are set to 'Yes'. The 'Required' dropdown is set to 'Never'. At the bottom, there are 'Copy From...', 'OK', 'Add', and 'Cancel' buttons. The status bar at the very bottom shows 'Ready'.

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: <ul style="list-style-type: none"> Always. The field is only displayed and cannot be modified. (The field appears grayed-out similar to Component Type in "Figure 8-3. Field window Attributes tab" above.) 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.

Table 8-3. Field window Attributes tab field descriptions, continued

Field Name	Description
Required	Select whether a value must be supplied for this field. Choices include: <ul style="list-style-type: none">• Always. A value for this field is always required. (An asterisk will precede the field prompt in the report as shown for Show Columns in "Figure 3-2. Data Source Detail report fields" on page 32.)• 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. Field window Default tab field descriptions" on the next page.](#)

Figure 8-4. Field window Default tab

The screenshot shows the 'Field: New' dialog box with the 'Default' tab selected. The dialog contains the following elements:

- Field Prompt:** A text input field.
- Token:** A text input field.
- Description:** A text input field.
- Enabled:** Radio buttons for 'Yes' (selected) and 'No'.
- Validation:** A text input field with a list icon, and 'New' and 'Open' buttons.
- Component Type:** A dropdown menu currently set to 'None'.
- Multiselect:** Radio buttons for 'Yes' and 'No' (selected).
- Default Type:** A dropdown menu currently set to 'None'.
- Visible Value:** A text input field.
- Depends On:** A dropdown menu currently set to 'None'.
- Buttons:** 'Copy From...', 'OK', 'Add', and 'Cancel'.
- Status Bar:** Displays 'Ready'.

Table 8-4. Field window Default tab field descriptions

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

Dependencies Tab

View or modify each field on the **Dependencies** tab, as described in "[Table 8-5. Field window Dependencies tab field descriptions](#)" on the next page.

Figure 8-5. Field window Dependencies tab

The screenshot shows the 'Field: New' dialog box with the 'Dependencies' tab selected. The 'Field Prompt' and 'Token' fields are empty. The 'Description' field is also empty. The 'Enabled' section has 'Yes' selected. The 'Validation' section has a text box and 'New' and 'Open' buttons. The 'Component Type' dropdown is set to 'None'. The 'Multiselect' section has 'No' selected. The 'Clear When The Following Changes' dropdown is set to 'None'. The 'Display Only When' and 'Required When' sections each have a dropdown set to 'None' and a 'like' dropdown. The 'Copy From...' button is on the left, and 'OK', 'Add', and 'Cancel' buttons are on the right. The status bar at the bottom shows 'Ready'.

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.

Table 8-5. Field window Dependencies tab field descriptions, continued

Field Name	Description
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. Report Type window Layout tab field descriptions" on the next page](#). Note that clicking **Preview** allows you to experiment with the organization and presentation of the fields.

Figure 8-6. Report Type window Layout tab

The screenshot shows the 'Report Type : My Release Detail Report' window. The 'Layout' tab is selected, showing a list of fields and their layout options. The fields are arranged in two columns:

Field	Layout Option
<input type="checkbox"/> Release From:	<input type="checkbox"/> Show Distributions:
<input type="checkbox"/> Release To:	<input type="checkbox"/> Show Packages:
<input type="checkbox"/> Release Contains:	<input type="checkbox"/> Show Requests:
<input type="checkbox"/> Created By:	<input type="checkbox"/> Show References:
<input type="checkbox"/> Release Manager:	<input type="checkbox"/> Show Notes:

Below the fields, there are controls for 'Field Width' (set to 1), 'Component Lines' (a button), 'Move Field' (with up, down, left, and right arrows), and a 'Swap Mode' checkbox. A 'Preview' button is located at the bottom right of the field list area. At the very bottom of the window are 'OK', 'Save', and 'Cancel' buttons. The status bar at the bottom left says 'Ready'.

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 (<code>>>></code>) 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

Report Type : My Release Detail Report

Report Type Name: My Release Detail Report

Reference Code: MY_RELEASE_DETAIL_REPORT

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

Requires License: Deployment Management Enabled: ☒ Yes ☐ No

Report Category: Deployment Management

Fields | Layout | **Commands** | Security | Ownership

Commands		Command Steps
Command	Condition	Command
Run Report	[AS.SERVER_TYPE_COD]	ksc_local_exec [AS.ORACLE_HOME]/bin/[AS.SQLPLUS] [AS.DB_USERNAME]
Run Report	[AS.SERVER_TYPE_COD]	(not expanded)

+ All - All New Cmd Edit Cmd Copy Cmd Remove Up Down

OK Save Cancel

Ready

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. Edit Command window" on the next page) or New Command window (shown in "Figure 8-8. New Command window" below), as described in "Commands Tab" on the previous page. (Similar to Report Type windows, the only difference in these two windows is whether they include data.)

Figure 8-8. New Command window

The screenshot shows a "New Command" dialog box. The title bar is "New Command" with a close button. The dialog contains the following fields and controls:

- Command:** A text input field.
- Condition:** A text input field.
- Description:** A text input field.
- Timeout (s):** A text input field containing the value "90".
- Enabled:** Two radio buttons, "Yes" (selected) and "No".
- Steps:** A large text area for defining command steps.
- Buttons:** "Tokens", "Special Cmd", "Show Desc", "OK", "Add", and "Cancel".
- Status Bar:** Displays "Ready".

Figure 8-9. Edit Command window

hp Edit Command

Command: Run Report

Condition: [AS.SERVER_TYPE_CODE]='UNIX'

Description: Runs the Report

Timeout (s): 300

Enabled: ☒ Yes ☐ No

" "[P.P_SHOW_PKG]" "[P.P_SHOW_REQ]" "[P.P_SHOW_REF]" "[P.P_SHOW_NOTES]" "[P.P_INCLUDE_CLOSED]"

Tokens Special Cmd Show Desc OK Apply Cancel

Ready

Table 8-7. Command window field descriptions

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

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

Figure 8-10. Report Type window Security tab

The screenshot shows the 'Report Type : My Release Detail Report' window with the 'Security' tab selected. The 'Report Type Name' is 'My Release Detail Report' and the 'Reference Code' is 'MY_RELEASE_DETAIL_REPORT'. The 'Description' is 'View the contents of a release. Lists all requests, packages, and distributions associated with a release.' The 'Requires License' is set to 'Deployment Management' and 'Enabled' is 'Yes'. The 'Report Category' is 'Deployment Management'. The 'Reports can be submitted and viewed by' dropdown is set to 'Only users in the allowed Security Groups'. Under 'Security Group Settings', the checkbox 'Users in the allowed Security Groups can submit, but each report can be viewed only by its creator' is checked. The 'Restricted Security Groups' list is empty, and the 'Allowed Security Groups' list contains '(Demand Demo) Application Manager' and 'APM Administrator'. The 'Always restrict new Security Groups' checkbox is unchecked. The window has 'OK', 'Save', and 'Cancel' buttons at the bottom right, and a 'Ready' status bar at the bottom left.

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: <ul style="list-style-type: none">• All users with Report Browsing access (meaning users with the System: Submit Reports access grant)• Only users in the allowed Security Groups
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.

Note: Only security groups that have Edit Report Types AND View Report Types access grant can be shown in Restricted Security Groups field and Allowed Security Groups field.

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. Report Type window Ownership tab field descriptions" on the next page.](#)

Tip: 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

Report Type : My Release Detail Report

Report Type Name: My Release Detail Report

Reference Code: MY_RELEASE_DETAIL_REPORT

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

Requires License: Deployment Management

Enabled: ☒ Yes ☐ No

Report Category: Deployment Management

Fields | Layout | Commands | Security | Ownership

Give ability to edit this Report Type to :
☒ All users with the Edit Report Types Access Grant
☐ Only groups listed below that have the Edit Report Types Access Grant

Security Group	Description
----------------	-------------

Add Remove

OK Save Cancel

Ready

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

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

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Feedback on Reports Guide and Reference (Project and Portfolio Management Center 9.30)

Just add your feedback to the email and click send.

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