

HP Project and Portfolio Management Center

Software Version: 9.20

Customizing the Standard Interface

Document Release Date: February 2014 (Second Edition)

Software Release Date: February 2013



Legal Notices

Warranty

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

The information contained herein is subject to change without notice.

Restricted Rights Legend

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

Copyright Notice

© Copyright 1997 - 2013 Hewlett-Packard Development Company, L.P.

Trademark Notices

Adobe® is a trademark of Adobe Systems Incorporated.

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

UNIX® is a registered trademark of The Open Group.

Documentation Updates

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

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

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

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

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

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

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

Document Changes

Chapter	Version	Changes
"Branding Your Instance" on page 12	9.20 (2nd Edition)	Updated "Table 2-1. Corporate logo files used in the PPM Center standard interface" on page 14 to make sure the images listed in the table are consistent with the standard interface of PPM Center version 9.20.

Support

Visit the HP Software Support Online web site at: <http://www.hp.com/go/hpsupport>

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

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

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

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

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

To find more information about access levels, go to:

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

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

Contents

Contents	3
Chapter 1: Getting Started with Customizations	7
Overview of Customizations	7
Risk Factors	9
Risk Mitigation	10
Typical Modifications	10
Unusual Requirements	11
Recommended Skills	11
Chapter 2: Branding Your Instance	12
Working with Cascading Style Sheets	12
Controlling Fonts and Colors	12
Font Usage	12
Color Usage	12
Modifying Style Sheets	13
Customizing the Standard Interface	13
Changing the Corporate Logos	13
Changing the Fonts	14
Changing the Colors	14
Changing the Sign Out Button Borders or Text	22
Chapter 3: Customizing Your Instance	24
Enhancing the Logon Page	24
Identifying an Instance	26
Customizing PPM Workbench Title Bar	26
Customizing Menu Items	27
Changing Menu Item Text	27
Adding a Menu Item	28
Changing a Menu Item	31
Restricting Access to a Menu Item	32
Restricting Access to a Menu Item by Configuring Access Grants and Licenses ...	32

Restricting Access to a Menu Item by Configuring Security Group Reference Code	33
Restricting Access to a Menu Item by Configuring server.conf Parameter Value	34
Specifying Portlet Field Colors	34
Chapter 4: Customizing Your PPM Documentation Library	38
Working with the Library	38
Understanding the Library's Framework	38
Overview of the Library.xml File	41
Overview of the Cameo.xml File	43
Overview of the Custom.xml File	44
Supported File Types	45
Guidelines for Modifying the Library Files	46
Where to Find the Files	46
Working with the Library.xml File	47
Working with the Cameo.xml File	53
Working with the Custom.xml File	55
Chapter 5: Advanced Topics	60
Component Overview	60
Identifying CSS Files and Class Definitions	60
Example: Finding Information for a PPM Dashboard Page	60
Example: Finding Information for a Non-Dashboard Page	61
Where to Find the Files	62
Modifying JSP Files	63
JSP Page Definitions	63
Guidelines for Modifying JSP Pages	64
Header.jsp File	64
Making Changes to Specific Pages	65
Example: JSP, CSS, and the Standard Interface	65
Appendix A: Color Names	67
Appendix B: Sample Files	73
ColorPalette.css Portlet Color Specification File	73
Library.dtd File	73

Custom.dtd File 74

Cameo.dtd File 74

We appreciate your feedback! 76

Chapter 1: Getting Started with Customizations

- ["Overview of Customizations" below](#)
- ["Recommended Skills" on page 11](#)

Overview of Customizations

After installing Project and Portfolio Management Center (PPM Center), you may want to change certain aspects of the standard interface to better suit your company's visual guidelines. The following characteristics of the standard interface can be customized:

- Corporate logos
- Fonts
- Colors

In general, the standard interface is composed of the following areas whose appearances are controlled by different sets of cascading style sheet files which you can modify to meet your requirements.

- **Banner and menu bar.** The banner is a white "ribbon" composed of corporate logo, product information, current user information, and the **Sign Out** button (see ["Figure 1-1. PPM Center banner and menu areas" on the next page](#)).

Changes made to the files for this area tend to be near-global in scope since this area is common to both the PPM Dashboard application and all the other PPM Center application modules (such as HP Project Management or HP Resource Management). Customizations made to the files affecting this area are typically displayed the next time a user logs in.

Note that the font settings for the navigation history (bread crumbs) presented directly below the menu are controlled using the PPM Dashboard settings even though they do not appear in the Dashboard portion of the page.

- **PPM Dashboard.** When viewing a PPM Dashboard page (that is, when using the PPM Dashboard application), this includes below the menu bar and banner (see ["Figure 1-2. PPM Dashboard area" on the next page](#)).

Other than any modifications to the navigation history text, changes made to files for this area tend to be specific to a single PPM Dashboard page or portlet.

- **Other non-Dashboard pages.** When viewing any non-Dashboard application page, this includes anything below the menu bar and banner (such as Create New Request, Request Detail, and so forth). For this area, see ["Figure 1-3. Non-Dashboard area" on page 9](#).

Customizations made to files for this area tend to be specific to various aspects of PPM Center applications. Similar to the banner and menu bar, updates to the files affecting this area are usually displayed the next time a user logs in.

Figure 1-1. PPM Center banner and menu areas

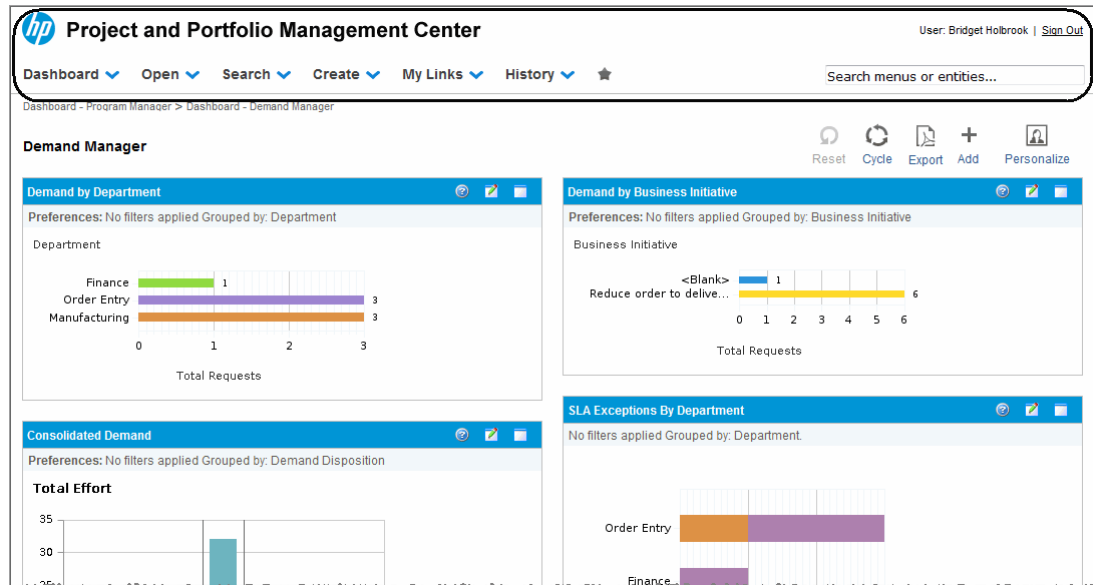


Figure 1-2. PPM Dashboard area

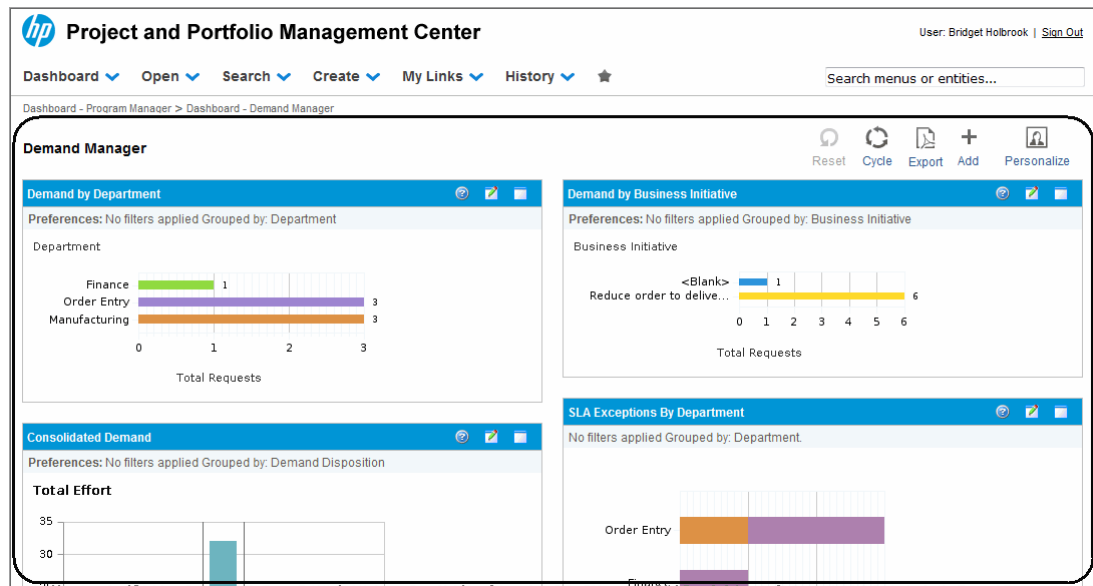


Figure 1-3. Non-Dashboard area

Current Demand	Effort	Count
Scheduled	15	3
Totals	15	3

Note: Note that to separate areas of related data, many pages include visual elements such as headings, subheadings, and rules. If you elect to rebrand your instance, you may also want to change the colors of these elements.

The example shown in "Figure 1-3. Non-Dashboard area" above includes two headings (labeled **Demand to be Scheduled** and **Filter by**), one subheading (labeled **Demand Information**), and one rule (found below the lowermost **Apply** button).

Risk Factors

Risks fall into the following categories:

- **Service pack overwrites/incompatibilities.** Your customizations may not be preserved or fully compatible after the installation of any service pack.
- **Upgrade overwrites/incompatibilities.** During a system upgrade, changes made to any customized files may not be preserved, or due to changes in system architecture,

customizations may not be fully compatible with a subsequent release.

- **Human factors.** Errors may be introduced when making changes.

Risk Mitigation

To minimize these risks, HP recommends the following:

- Before making changes, back up the PPM Server files.

If backing up the entire PPM Server is not an option, the following activities should be undertaken:

- Make a backup copy of each file before making any changes.
- Make another backup copy of each file after making the changes.
- Ensure that all backup copies are identifiable as to their contents.
- Make changes to "working" copies of the files that are not on the PPM Server.
- Keep all backup copies in a safe location. This location should be separate from the PPM Server, yet accessible to all instance administrators.
- Thoroughly test all changes before deploying the customized files.
- For modifications requiring restarts of the PPM Server, consider scheduling these activities when they will have the least impact on the PPM Center user community.

Typical Modifications

The most common type of customization involves rebranding. That is, changing the banner, heading, and rule colors to those matching your corporate color palette, as well as replacing the corporate logos with your own. Details to assist with these types of customizations are discussed in ["Branding Your Instance" on page 12](#). Note that rebranding is limited to the standard interface—the PPM Workbench interface cannot be customized. There is only one exception to that—you can customize the title bar of the PPM Workbench displayed to users.

Some sites prefer to make changes that augment the information displayed in the standard interface. How to make changes, such as enhancing your logon page or changing menu item text, are described in ["Customizing Your Instance" on page 24](#).

Additionally, you can modify the list of product documents and you have the capability to This is beneficial when only a limited portion of PPM Center's capabilities are licensed at your site and, therefore, you do not need to provide documentation for the unlicensed applications. host site-specific, customer-provided, or tailored documents that are accessible from the Documentation Library page. Implementing these features are detailed in ["Customizing Your PPM Documentation Library" on page 38](#).

Unusual Requirements

["Advanced Topics" on page 60](#) provides tips and techniques for resolving the unexpected or unusual customizations that may be desired for your PPM Center instance.

Recommended Skills

Familiarity with the following skill sets will help you implement the changes described in this document:

- JSP
- HTML and cascading style sheets (CSS)
- XML (including DTD)

Chapter 2: Branding Your Instance

- ["Working with Cascading Style Sheets" below](#)
- ["Customizing the Standard Interface" on the next page](#)

Working with Cascading Style Sheets

Controlling Fonts and Colors

Font characteristics, as well as foreground and background colors, are formatted using cascading style sheets (CSS files). Style classes, defined in these CSS files, are used to centralize the definitions of font characteristics (such as family, point size, and color) along with the colors to be used for the background and foreground.

Editing the CSS files allows you to change the fonts and colors to conform to your company's guidelines. You should be familiar with cascading style sheets before making any changes to the CSS files provided with PPM Center.

Some of the CSS files provided with PPM Center are language-specific. The file names associated with languages read from right to left (such as Hebrew) end in `_rtl.css` whereas the file names for languages read from left to right (such as English) *may* end in `_ltr.css` or *may not* have any "directional" notation. For these types of CSS files, it is necessary to change only those CSS files corresponding to the language used on your PPM Center instance.

Font Usage

In general, the font family used throughout PPM Center is Arial, Verdana, and sans-serif. The text color is black (`#222222` or `#000000`), white, blue, or gray, depending on the background color. The informational text, displayed in the message box, is red or black, depending on the message types. Also, if the text is displayed on a button, the color may change when you hover over or click the button.

Color Usage

Given the variety of visual elements displayed in the standard interface, numerous colors have been defined within the product and its CSS files. Keep in mind that some colors are specific to supporting features like progress bars, health conditions, charts, or outlines.

In an effort to complement most corporate color palettes, neutral colors have been selected for the majority of Web components of the PPM Center product. However, you may want to adjust some of the more vivid colors and highlights to conform to, or supplement, your company color and branding policies. To assist you in making optional color choices, see ["Color Names" on page 67](#), for information about color names, hexadecimal codes, and where to view color samples.

Modifying Style Sheets

Style sheets that support the PPM Dashboard are included in the `dashboard.war` directory; Non-Dashboard style sheets are stored in the `itg.war` directory on the PPM Server. Changes made to these files do not require a restart of the PPM Server to become effective.

To modify style sheets:

1. Copy the desired style sheet to a "working" location.

Remember that you should have a backup copy of this file stored in a safe location.

2. Edit the temporary version of the CSS file as desired.
3. Copy the updated CSS file to its original location on the PPM Server, overwriting the existing file.

You should also place a copy of this updated file in a safe location where it does not overwrite the original (or any previously updated) file.

4. (Optional, although highly recommended) Verify the changes by logging off, and then logging back onto PPM Center and viewing the page(s) you intended to affect.

Customizing the Standard Interface






Changing the Corporate Logos

The corporate logos identified in "[Table 2-1. Corporate logo files used in the PPM Center standard interface](#)" on the next page are some of those used in the PPM Center standard interface. You may want to change all or only a few of the ones shown, based on your product licensing and the amount of rebranding you want to accomplish.

The following placeholders may have been used to describe portions of the paths for the files identified in "[Table 2-1. Corporate logo files used in the PPM Center standard interface](#)" on the next page.

<code><PPM_Home></code>	represents the path where your PPM Center instance was installed. For example: <code>xyzserver/E\$/PPMServer</code> .
<code><PPM_Server_Name></code>	represents the name assigned to your PPM Server during installation. For example: <code>xyzProduction</code> . (This corresponds to the <code>KINTANA_SERVER_NAME</code> <code>server.conf</code> parameter value and does not necessarily reflect the host name of the server.)

Table 2-1. Corporate logo files used in the PPM Center standard interface

Image	File Location	Size (in pixels)
Stored on the PPM Server File System		
	<ul style="list-style-type: none"> • <code><PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/images/favicon-whiteonred.ico</code> 	16 x 16
	<ul style="list-style-type: none"> • <code><PPM_Home>/server/<PPM_Server_Name>>/deploy/itg.war/html/MercurySplash.gif</code> 	450 x 301
	<ul style="list-style-type: none"> • <code><PPM_Home>/server/<PPM_Server_Name>>/deploy/itg.war/images/common/CorporateBrand.png</code> 	480 x 40
	<ul style="list-style-type: none"> • <code><PPM_Home>/server/<PPM_Server_Name>>/deploy/itg.war/web/new/img/HP_Blue_64x64.png</code> 	64 x 64
	<ul style="list-style-type: none"> • <code><PPM_Home>/server/<PPM_Server_Name>>/deploy/itg.war/web/new/img/ppm_logo.png</code> 	400 x 400

Changing the Fonts

Although the fonts can be changed, doing so can have unexpected and undesirable results on the quality and readability of the PDF files exported from the PPM Center product. The PDF generation processes support a limited (and varying) assortment of fonts; therefore, HP strongly recommends that you rely on the existing settings.

Changing the Colors

Many visual elements in the PPM Center standard interface use a combination of ribbons or rules (see ["Figure 1-3. Non-Dashboard area" on page 9](#)).

If your corporate color scheme includes only one color, this color would be the most likely candidate to replace the blue (#003366) used in these visual elements of the standard interface. However, if your color palette includes multiple colors, you may also want to use one of your other colors to replace the grey (#928E89) elements.

["Table 2-2. Files using corporate colors" on the next page](#) identifies the files where these colors are defined for the major visual elements.

The following placeholders may have been used to describe portions of the paths for the files identified in ["Table 2-2. Files using corporate colors" on the next page](#).

<code><PPM_Home></code>	represents the path where your PPM Center instance was installed. For example: <code>xyzserver/E\$/PPMServer</code> .
-------------------------------	---

<PPM_Server_Name>	represents the name assigned to your PPM Server during installation. For example: xyzProduction. (This corresponds to the KINTANA_SERVER_NAME server.conf parameter value and does not necessarily reflect the host name of the server.)
-------------------	--

Table 2-2. Files using corporate colors

File Location	Class
Cascading Style Sheets Stored on the PPM Server File System	
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/css/common/AutoCompStyleSheet.css	Blue: <ul style="list-style-type: none"> • .ac-banner • .ac-available-iframe • .ac-selected-iframe • .ac-data-iframe
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css/AutoCompStyleSheet.css	Blue: <ul style="list-style-type: none"> • .ac-banner • .ac-available-iframe • .ac-selected-iframe • .ac-data-iframe
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/css/common/Dialog.css	Blue: <ul style="list-style-type: none"> • .pagetitle-mediumrule • .dialog-pagetitle-mediumrule

Table 2-2. Files using corporate colors, continued

File Location	Class
<PPM_Home>/pdf/DocStylesheet.css	<p>Blue:</p> <ul style="list-style-type: none"> • .footer-rule • .additional-information • .helpful-text-rule • .windoid-header • .warning-text • .header • .pagetitle-mediumrule • .thin-rule • .thick-rule • .medium-rule <p>Gray:</p> <ul style="list-style-type: none"> • .windoid-header • .windoid-footer
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/css/pm/EnterTime.css	<p>Blue:</p> <ul style="list-style-type: none"> • .time-tab-header
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css/FileDialogChooserStyleSheet.css	<p>Blue:</p> <ul style="list-style-type: none"> • .fd-data-iframe

Table 2-2. Files using corporate colors, continued

File Location	Class
<p><PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css/GlobalStyleSheet.css</p>	<p>Blue:</p> <ul style="list-style-type: none"> • .mainbanner • .header • .header-no-side-padding • .header-expandable • table.ov-frame-outer • .persborder1 • .persSecHeader • .pagetitle-heavyrule • .pagetitle-mediumrule • .thin-rule • .thick-rule • .medium-rule • .medium-rule-fixed-width • .medium-rule-secondary • .footer-rule • .footer-rule-t • .header-simple-title • .windoid-header • .tab-header <p>Gray:</p> <ul style="list-style-type: none"> • .centerbanner • .windoid-header • .windoid-footer

Table 2-2. Files using corporate colors, continued

File Location	Class
<p><PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css/Print.css</p>	<p>Blue:</p> <ul style="list-style-type: none"> • .mainbanner • .header-no-side-padding • .header-expandable • table.ov-frame-outer • .persborder1 • .persSecHeader • .pagetitle-heavyrule • .pagetitle-mediumrule • .thin-rule • .thick-rule • .medium-rule • .medium-rule-fixed-width • .medium-rule-secondary • .footer-rule-t • .header-simple-title • .windoid-header • .tab-header <p>Gray:</p> <ul style="list-style-type: none"> • .centerbanner • .windoid-header • .windoid-footer

Table 2-2. Files using corporate colors, continued

File Location	Class
<p><PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/htmlTemplates/Print.css</p>	<p>Blue:</p> <ul style="list-style-type: none"> • .mainbanner • .header-no-side-padding • .header-expandable • table.ov-frame-outer • .persborder1 • .persSecHeader • .pagetitle-heavyrule • .pagetitle-mediumrule • .thin-rule • .thick-rule • .medium-rule • .medium-rule-fixed-width • .medium-rule-secondary • .footer-rule-t • .header-simple-title • .windoid-header • .tab-header <p>Gray:</p> <ul style="list-style-type: none"> • .centerbanner • .windoid-header • .windoid-footer
<p><PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/rpt/css/reportGlobal.css</p>	<p>Blue:</p> <ul style="list-style-type: none"> • span.secHdrFGBanner

Table 2-2. Files using corporate colors, continued

File Location	Class
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/css/pm/WBS.css	Blue: <ul style="list-style-type: none"> • .footer-rule • .tab-header
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/yui/build/menu/assets/skins/ppm/menu-skin.css	Dark Gray: Medium Gray: Light Gray: Note: The background on the icons in this folder may also need to be changed.
JSP Files Stored on the PPM Server File System	
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/new/logon.jsp	Blue: <ul style="list-style-type: none"> • in-line CSS; look for bgcolor="#003366" Light gray: <ul style="list-style-type: none"> • in-line CSS; look for bgcolor="#cecece"
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/ResultsLayout.jsp	Blue: <ul style="list-style-type: none"> • in-line CSS; look for background-color: #003366
Stored in the dashboard.war Directory on the PPM Server	

Table 2-2. Files using corporate colors, continued

File Location	Class
static/arch/css/df-portal.css	<p>Blue:</p> <ul style="list-style-type: none"> • .top-line • .top-line-top • .top-line-bottom • .editor-line-top • .bottom-line • .bottom-line-top • .form-header • .expandable-form-header • table.portlet-frame-outer • table.portlet-frame-outer-drag • table.portlet-box-outer • table.hidden-portlet-box-outer • table.selected-portlet-box-outer • .windoid-header • td.ac-banner • .ac-available-iframe • .ac-selected-iframe • table.ac-buttons-area-outer • .ac-data-iframe • table.ac-order-buttons-area-outer • tr.windoid-banner • td.multiple-drilldown-border-top • td.multiple-drilldown-border-right

Table 2-2. Files using corporate colors, continued

File Location	Class
static/arch/css/df-portal.css (continued)	<ul style="list-style-type: none"> • .error_header • .error_footer • table.pleasewait <p>Gray:</p> <ul style="list-style-type: none"> • .windoid-footer • body.windoid-body • td.windoid-banner • td.windows-top-close-button-area

Changing the Sign Out Button Borders or Text

If the color of the white ribbon in the banner is changed, the text or the border of the **Sign Out** button may "disappear" or may not complement your new color choice. Consequently, you may want to change the border colors to better coordinate with your color selection, or to better identify the button.

To change the color of the **Sign Out** button borders and text:

1. Copy the `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css/GlobalStyleSheet.css` file to a "working" location,

where

<code><PPM_Home></code>	represents the path where your PPM Center instance was installed. For example: <code>xyzserver/E\$/PPMServer.</code>
<code><PPM_Server_Name></code>	represents the name assigned to your PPM Server during installation. For example: <code>xyzProduction.</code> (This corresponds to the <code>KINTANA_SERVER_NAME</code> <code>server.conf</code> parameter value and does not necessarily reflect the host name of the server.)

Remember that you should have a backup copy of this file stored in a safe location.

2. Open the temporary file for edit.

3. Locate and change the color settings used in the following classes:

- span.signOutBtn1
- span.signOutBtn1 A

4. Save and close the file.

5. Copy the updated file to its original location on the PPM Server, overwriting the existing file.

You should also place a copy of this updated file in a safe location where it does not overwrite the original (or any previously updated) file.

6. (Optional, although highly recommended) Verify the changes by logging off, and then logging back onto PPM Center and viewing the **Sign Out** button.

Chapter 3: Customizing Your Instance

- ["Enhancing the Logon Page" below](#)
- ["Identifying an Instance" on page 26](#)
- ["Customizing PPM Workbench Title Bar" on page 26](#)
- ["Customizing Menu Items" on page 27](#)
- ["Specifying Portlet Field Colors" on page 34](#)

Enhancing the Logon Page

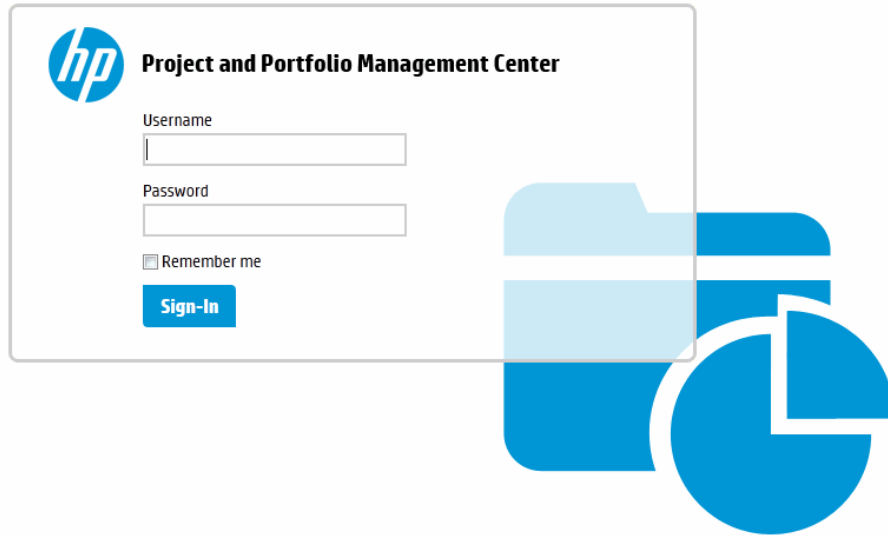
You may want to provide site-specific information on the logon page of your PPM Center instance to help the users in your organization. This could include the following types of information (among many others):

- Site administration contact information
- System availability notices
- Site-specific licensing and usage details
- Client-specific advice

["Figure 3-1. Custom logon page" on the next page](#) shows a page containing advisory information about client configuration. The page also provides contact details for the instance administrator.

Figure 3-1. Custom logon page

© Copyright 1997-2013 Hewlett-Packard Development Company, L.P.



Notice: PPM Center uses pop-up windows and will not function properly if pop-up blocker software is in use. For assistance with PPM Center accounts, contact PPM_admin@xyz.com.

To customize your logon page:

1. In a "working" location, create a new JSP file that contains the details that you want to display.

This uniquely named file will ultimately reside in the `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/new/` directory,

where

<code><PPM_Home></code>	represents the path where your PPM Center instance was installed. For example: <code>xyzserver/E\$/PPMServer.</code>
<code><PPM_Server_Name></code>	represents the name assigned to your PPM Server during installation. For example: <code>xyzProduction.</code> (This corresponds to the <code>KINTANA_SERVER_NAME</code> <code>server.conf</code> parameter value and does not necessarily reflect the host name of the server.)

For example, you might create the following file named `PPM_Notice.jsp`:

```
<div class="comments">
<div><b>Notice:</b> PPM Center uses pop-up windows and will not function properly if pop-up blocker software is in use.</div>
<div>For assistance with PPM Center accounts, contact PPM_admin@xyz.com.</div>
</div>
```

You should also place a copy of this updated file in a safe location where it does not overwrite any previously updated version of the file.

2. Copy the `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/new/logon.jsp` file to the "working" location.

Remember that you should have a backup copy of this file stored in a safe location.

3. Edit the temporary version of the `logon.jsp` file as follows:

Immediately *before* the `</body>` tag, insert text similar to the following, substituting the name of the file you created in [step 1](#) for `PPM_Notice.jsp`.

```
<jsp:include page="PPM_Notice.jsp"/>
```

4. Save and close the file.

Remember that you should also have a backup copy of this modified file stored in a safe location.

5. Copy the `logon.jsp` file *and* the file you created in [step 1](#) to the `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/new/` directory on your PPM Server.
6. Stop, then restart the PPM Server.
7. (Optional, although highly recommended) Verify the changes by logging off, then logging back onto PPM Center and viewing the results.

Identifying an Instance

If your site includes multiple PPM Center instances, it may be desirable to include identification of the instance in the banner. For example, if you have both a Test and Production instance, you might want the Test instance to be readily distinguishable from the Production instance.

The simplest way to accommodate this is to modify the `CorporateBrand.gif` file that appears in the white ribbon of the banner and make the changes as detailed in ["Branding Your Instance" on page 12](#).

Note: Keep in mind that you would not want to deploy this customized image file to your Production instance.

Customizing PPM Workbench Title Bar

You can customize the title bar displayed in PPM Workbench to users by setting the `server.conf` parameter `CUSTOM_SERVER_INFO`. This parameter enables customization of the PPM Workbench title bar.

For example,

```
com.kintana.core.server.CUSTOM_SERVER_INFO=Welcome to PPM workbench
```

In clustered environment, you can customize the PPM Workbench title bar of each node by setting the `server.conf` parameter `CUSTOM_SERVER_INFO` value on each node; if no value is set, the nodes will follow the master node's setting.

For information about how to edit the `server.conf` file, see the *Installation and Administration Guide*.

Customizing Menu Items

Changing Menu Item Text

In rare circumstances, it may be meaningful to change the text that appears on the menu bar. For example, menu item text may be changed to match (or complement) the names of other products used within your company thereby emphasizing concepts, such as processes, integrations, or policies; or additional site-specific details associated with that particular menu item.

Menu text is controlled in the `menu.xml` file, which utilizes localization files for each supported language. The XML describing the content of the menu is stored in the following directory: `<PPM_Home>/conf/menus/menu.xml`. The `<PPM_Home>` placeholder represents the path where your PPM Center instance was installed. For example: `xyzserver/E$/PPMServer`.

A menu item (regardless of whether it has submenus) looks like:

```
<menu id="ResourceFinderMenuItem" key="SEARCH_RESOURCE_AVAILABILITY_MENU_TEXT.TXT" bundle="KNTA_RESOURCES">
```

where the value of the key is the label and the value of bundle represents the name of the resource bundle where the label can be found.

To create a custom resource bundle:

1. Identify the menu item you want to change.
2. Create the custom resource bundle under `<PPM_Home>\server\<server name>\deploy\itg.war\WEB-INF\resources\web`. For example, `MyResources.properties`.
3. Add a new resource in this file by adding a line, as follows:

```
"myCustomLabel"=My Custom Label
```

4. Edit the `menu.xml` and change the key and bundle values to make them look like the following:

```
<menu id="ResourceFinderMenuItem" key="myCustomLabel" bundle="MyResources">
```

5. Save and close the file.

If you are using non-standard (foreign language) characters, such as â, ç, é, ö, or ñ, make sure you encode the file in UTF-8 format.

Tip: Microsoft® Notepad supports UTF-8 encoding when using the **Save As** functionality.

6. Stop, and then restart the PPM Server.
7. (Optional, although highly recommended) Verify the changes by logging off, and then logging back onto PPM Center and reviewing the menu item.

Adding a Menu Item

Add a new menu item only when it is really necessary to meet your business needs.

Note: Make sure that your new menu item follows the XML schema (`<PPM_Home>/conf/menus/menu.xsd`).

PPM Center version 9.1x does not support adding a top level menu. Your new customized menu items may fall under **Open**, **Create**, or **Search** menu.

To add a new menu item, follow the steps below:

1. Locate the `menu.xml` file that describes content of menu items in the `<PPM_Home>/conf/menus/menu.xml` directory and open it in an XML editor.
2. Locate the line that represents the menu group under which you want to add the new menu item.

For example, the line for the **Demand Management** menu group under **Open** menu looks like:

```
<menu id="DEMAND_MANAGEMENT_MENU" key="DEMAND_MANAGEMENT_MENU_TEXT.TXT" bundle="KNTA_Resources" seq="10">
```

For **Create** menu group, the line looks like:

```
<menu id="MENU_CREATE" key="menu.create" bundle="CoreResources" sorting="leaves-top">
```

3. Depending on the security level you want to apply to the new menu item, under the desired menu group, locate a code snippet with similar security requirements, copy and paste it into the appropriate location in the `menu.xml` file as a starting point for editing it.

For example, if your new menu item has security requirements similar to the menu item **Create > Project**, copy and paste the following code section:

```
<menu id="CREATE_PROJECT" key="entity.project" bundle="CoreResources">  
  <url>/itg/project/CreateProjectPage.do</url>  
  <security>
```

```
<and>
  <or>
    <license reference-code="6" />
    <license reference-code="8" />
    <license reference-code="3" />
    <license reference-code="2" />
  </or>
  <access-grant reference-code="1316" />
  <or>
    <access-grant reference-code="1095" />
    <access-grant reference-code="1091" />
  </or>
</and>
</security>
</menu>
```

If your new menu item has no security requirements, you may simply copy and paste a code snippet with the `<menu id>` element and the `<url>` element, for example:

```
<menu id="IMPORT_CATALOG_DATA_MENU" key="IMPORT_CATALOG_DATA_MENU_TEXT.TXT"
bundle="KNTA_Resources">
  <url>/itg/web/knta/src/SRCXMLImporter.jsp</url>
</menu>
```

For more information about applying security requirements on a menu item, see ["Restricting Access to a Menu Item" on page 32](#).

4. Edit menu item text.

- a. Create a custom resource bundle under `<PPM_Home>\server\<server name>\deploy\itg.war\WEB-INF\resources\web`. For example, *MyResources.properties*.
- b. Add a new resource in this file by adding a line, as follows:
`"myCustomLabel"=My Custom Label`
- c. Edit the code section you pasted in the *menu.xml* file by changing the menu ID, key, and bundle values to make them look like the following:
`<menu id="MyMenuItem" key="myCustomLabel" bundle="MyResources">`

5. Edit menu item URL.

To provide a URL for your new menu item, make sure that you already have a URL available for use.

After editing, the URL for the new menu item should look similar to URLs for other menu items under the same menu group.

For example,

```
<url>/itg/MyMenuItem/MyMenuItemPage.do</url>
```

Or,

```
<url>/itg/web/knta/dem/MyMenuItemPage.jsp</url>
```

6. Edit security requirements.

See details in ["Restricting Access to a Menu Item by Configuring Access Grants and Licenses" on page 32](#).

7. Save and close the file.

If you are using non-standard (foreign language) characters, such as â, ç, é, ö, or ñ, make sure you encode the file in UTF-8 format.

Tip: Microsoft® Notepad supports UTF-8 encoding when using the **Save As** functionality.

8. Stop, and then restart the PPM Server.
9. (Optional, although highly recommended) Verify the changes by logging off, and then logging back onto PPM Center and reviewing the menu item.

Changing a Menu Item

Sometimes you may want to change an existing menu item so that it points to your custom entity. For example, you may want to change the PPM Center default proposal request type to your default request type for creating proposals.

Taking the PPM Center default proposal request type as an example, to change the menu item and make it point to your custom request type, follow the steps below:

1. Locate the code snippet representing **Create > Proposal** menu item in the `menu.xml` file:

```
<menu id="CREATE_PROPOSAL" key="entity.proposal" bundle="CoreResources">
  <url>/itg/web/knta/crt/RequestCreateDispatcher.jsp?BUSINESS_KEY=_PFM_PROP
OSAL</url>
  <security>
    <and>
      <license reference-code="2" />
      <or>
        <access-grant reference-code="1045" />
        <access-grant reference-code="1041" />
      </or>
    </and>
  </security>
</menu>
```

2. (Optional) Edit menu item text.

- a. Under the `<PPM_Home>\server\<server name>\deploy\itg.war\WEB-INF\resources\web directory`, locate the `CoreResources.properties` resource bundle file and open it.

- b. Locate the line representing the **Proposal** entity:

```
entity.proposal=Proposal
```

Modify the line as necessary, for example:

```
entity.myproposal=MyProposal
```

- c. Edit the `menu.xml` file by changing the menu ID, key, and bundle values to make them look like the following:

```
<menu id="CREATE_PROPOSAL" key="entity.myproposal"
bundle="CoreResources">
```

3. Edit the menu item URL to make it point to your default proposal request type.

You should already have a URL for your default proposal request type.

Replace the URL value in the following line with the URL for your default proposal request type:

```
<url>/itg/web/knta/crt/RequestCreateDispatcher.jsp?BUSINESS_KEY=_PFM_PROPOSAL</url>
```

4. Save and close the file.
5. Stop, and then restart the PPM Server.
6. (Optional, although highly recommended) Verify the changes by logging off, and then logging back onto PPM Center and reviewing the menu item.

Restricting Access to a Menu Item

Starting from PPM Center version 9.10, you can restrict access to a menu item by combining any of the following four ways:

- Access grant
- License
- Security group
- Server parameter

Note: For more information about access grants, licenses, and security groups, see the *Security Model Guide and Reference*.

For more information about server parameters, see the *Installation and Administration Guide*.

Restricting Access to a Menu Item by Configuring Access Grants and Licenses

You may control the security level of the menu item by combining PPM Center product licenses and access grants.

The code line for a product license looks like:

```
<license reference-code="<PRODUCT_KEY>" />
```

where the value for `license reference-code` represents a product key.

The code line for an access grant looks like:

```
<access-grant reference-code="<ACCESS_GRANT_KEY>" />
```

where the value for `access-grant reference-code` represents an access grant.

Edit the following code by adding or removing necessary lines to apply desired security level to your new menu item:

```
<security>
  <and>
    <or>
      <license reference-code="6" />
      <license reference-code="8" />
      <license reference-code="3" />
      <license reference-code="2" />
    </or>
    <access-grant reference-code="1316" />
    <or>
      <access-grant reference-code="1095" />
      <access-grant reference-code="1091" />
    </or>
  </and>
</security>
```

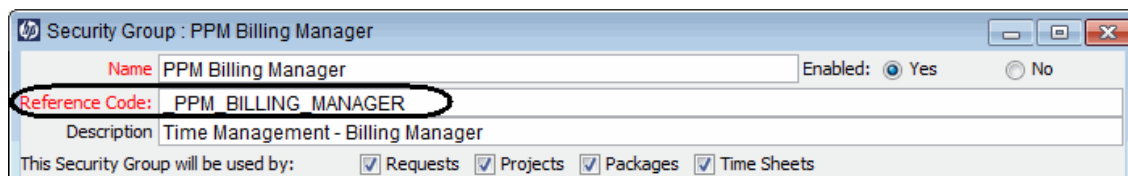
For product names and their corresponding product keys, check the KNTA_PRODUCTS view for PRODUCT_NAME column and PRODUCT_KEY column in your Oracle database for PPM Center.

For access grant names and their corresponding access grant keys, check the KNTA_ACCESS_GRANTS view for ACCESS_GRANT_NAME column and ACCESS_GRANT_KEY column in your Oracle database for PPM Center.

Restricting Access to a Menu Item by Configuring Security Group Reference Code

To restrict access to a menu item by security group, you need to configure security group reference code in the menu.xml file.

For example, if you want to restrict the access to PPM Billing Manager that has Demand Management license,



The menu.xml file configuration would look like the follows:

```
<security>
  <and>
    <security-group reference-code="_PPM_BILLING_MANAGER" />
    <license reference-code="2" />
  </and>
</security>
```

Note that the value of **Reference Code** field from the Security Group: PPM Billing Manager window in the Security Group Workbench is used to refer to access key for restricting access by security group.

Restricting Access to a Menu Item by Configuring *server.conf* Parameter Value

You can also use server parameters to restrict access to a menu item. This applies to *server.conf* parameters with a *true/false* value only.

Example:

```
<security>
  <and>
    <license reference-code="2" />
    <server-parameter name="COST_CAPITALIZATION_ENABLED" />
  </and>
</security>
```

This means that the menu item affected will be accessible when both of the following conditions are satisfied:

- The user has Demand Management license
- *server.conf* has a setting of *COST_CAPITALIZATION_ENABLED=true*

Specifying Portlet Field Colors

Occasionally, you may want to display portlet fields (having identical field labels) with the same color, regardless of the portlet in which they appear. For example, you may always want the colors red, amber, and green used for all portlet fields labeled High, Medium, and Low.

It is possible to specify a color in each and every portlet definition where the desired field is used; however, functionality exists that allows you to control colors for portlet fields on an instance-wide basis.

To specify global color usage for individual field labels:

1. Copy the *<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/dsh/portlet/css/ColorPalette.css* file to a "working" location,

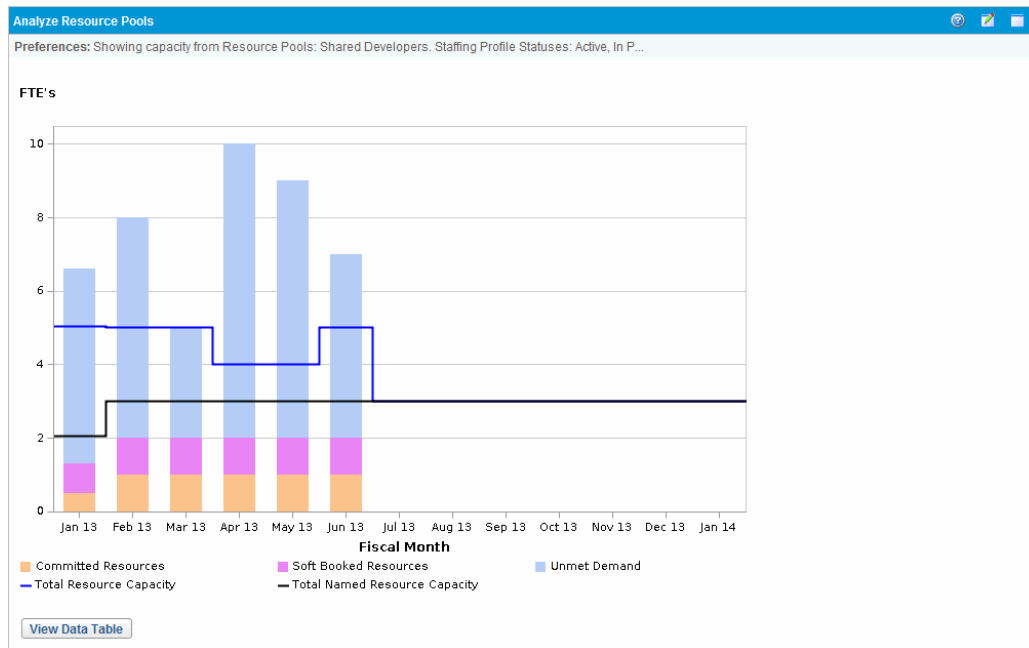
where

<i><PPM_Home></i>	represents the path where your PPM Center instance was installed. For example: <i>xyzserver/E\$/PPMServer.</i>
<i><PPM_Server_Name></i>	represents the name assigned to your PPM Server during installation. For example: <i>xyzProduction.</i> (This corresponds to the <i>KINTANA_SERVER_NAME</i> <i>server.conf</i> parameter value and does not necessarily reflect the host name of the server.)

Remember that you should have a backup copy of this file stored in a safe location.

2. Edit the temporary version of the CSS file as desired.
 - a. Identify the field labels you want to control and decide upon the color to use for each.

An existing portlet may be similar to the following:



For example, you may want to use the following colors for these field labels whenever they are used in *any* of your PPM Center portlets.

- Red (#FF0000) for Unmet Demand
 - Amber (#FFA500) for Assigned Demand: Softbooked
 - Green (#008000) for Assigned Demand: Committed
- b. Add the new color specification and label information as follows, making sure that you match the capitalization, spelling, and punctuation that appears in the legend of the portlet.

```
color: '#008000' label: 'Assigned Demand: Committed';  
color: '#FFA500' label: 'Assigned Demand: Softbooked';  
color: '#FF0000' label: 'Unmet Demand';
```

Caution: If the number of color entries in the `ColorPalette.css` file exceeds 1000, you must expand the size of the cache for this file.

Increase the value of the `COLOR_CACHE_SIZE` parameter in the `server.conf` file to accommodate the revised number of entries in the `ColorPalette.css` file. HP recommends that you exceed the actual number of entries to allow for future use (growth) of the `ColorPalette.css` file.

3. Save and close the file.
4. Copy the updated `ColorPalette.css` file to its original location of the PPM Server, overwriting the existing file.

You should also place a copy of this updated file in a safe location where it does not overwrite the original (or any previously updated) file.

5. Reload the updated file by pointing your browser to the following URL:

`<host>:<port>/itg/web/knta/admin/initColorPalette.jsp`

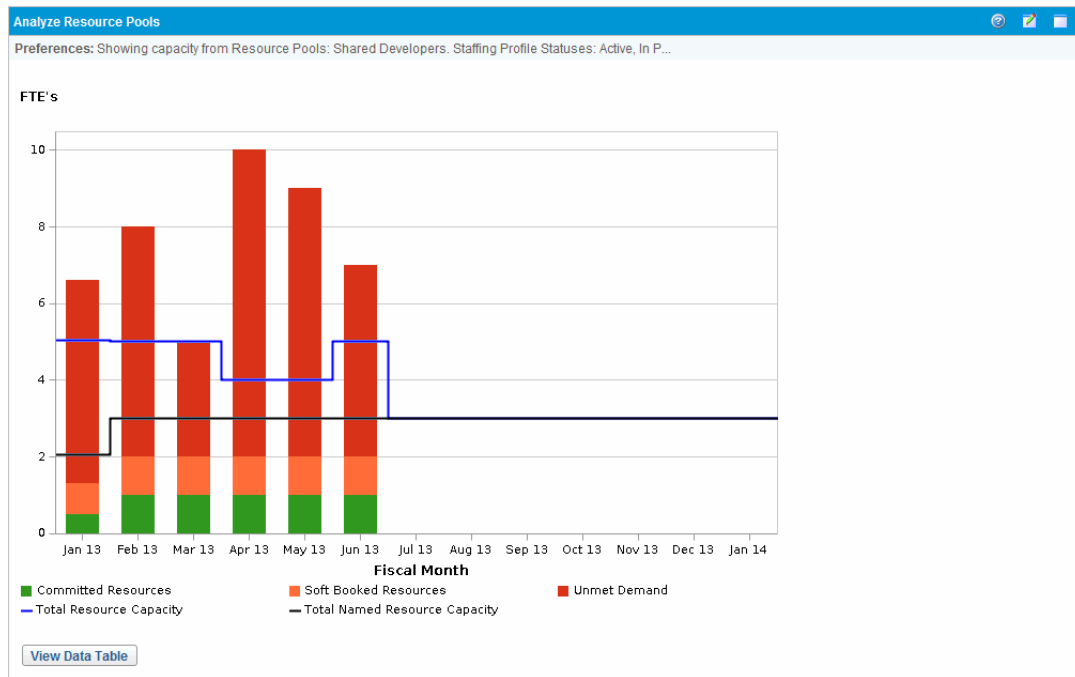
where

<code><host></code>	the host name or IP address of your PPM Center instance
<code><port></code>	the port number from which your PPM Center instance is accessed

A confirmation message is displayed.

6. (Optional, although highly recommended) Verify the changes by logging onto PPM Center and viewing the PPM Dashboard page(s) you intended to affect.

The resulting portlet would be similar to the following:



Chapter 4: Customizing Your PPM Documentation Library

Caution: This chapter applies to the old "customizable" documentation library only.

PPM Center version 9.20 introduced a new framework for the PPM Documentation Library, which does not support customization. However, you can still customize your own documentation library by switching back to the old framework. The customizable documentation library is still placed under the `<PPM_Home>/pdf/` directory.

To enable the customized documentation library, you need to modify the menu entry in the `menu.xml` configuration file. To do so,

1. Open the `<PPM_Home>/conf/menus/menu.xml` file.
2. Locate the menu item `LIBRARY_MENU`.
3. Change the URL of the menu item `LIBRARY_MENU` from `/itg/pdf/manual/dochome.htm` to `/itg/pdf/dochome.htm`.
4. Save the change.

Now you can customize your documentation library by following the instructions described in the subsequent sections of this chapter.

Note: If you choose to use the customizable documentation library, the look and feel of the library page would be totally different from the new out-of-the-box documentation library page.

Working with the Library

The PPM Documentation Library includes a customizable "framework" so that the documents listed there better meet the needs of the users of your PPM Center instance.

Rather than including the product documents, the PPM Documentation Library includes a set of documents that list the PPM Center documentation and their recommended organization. How to actually specify and deploy the selected documents using the PPM Documentation Library is described in the remainder of this chapter.

Since all of the documents provided by HP are available only in the English language, the PPM Documentation Library is localized for English only and is not updated during the installation of any language pack.

Understanding the Library's Framework

Documentation that best suits the needs of your PPM Center users tends to fall into the following categories:

- PPM Center "core" products (such as, HP Demand Management or system administration)
- PPM Center supplemental products (such as, the Extensions or Migrators)
- Customer provided (such as, in-house training or corporate process guides relating to PPM Center)

The PPM Documentation Library is segregated into three different Web pages to enable distribution of documents that correspond to these categories of documents. These are referred to as:

- **Library documents.** These appear on the home page of the PPM Documentation Library and are accessed from the **Product Information > Library** menu (see "[Figure 4-1. Library documents](#)" below for the default "home" page).

The home page should always be customized to include pertinent documents.

- **Supplemental product documents.** If documents are provided for this page, the home page will include the **Additional Project and Portfolio Management Center Products** link in the **Supplemental Information** section (see "[Figure 4-2. Supplemental product documents](#)" on the next page for a customized example).

This optional "cameo" page is intended to provide access to documents related to the PPM Center supplemental products, such as Connectors, Accelerators, Migrators, Extensions, and other HP-provided products.

Depending on the amount of information presented on your PPM Documentation Library home page and the number of documents that you include on this page, you may want to include the supplemental product documents on the home page.

- **Custom documents.** If documents are provided for this page, the home page will include the **Custom Documentation** link in the **Supplemental Information** section (see "[Figure 4-3. Custom, site-specific documents](#)" on the next page for a customized example).

This optional custom page is intended to provide access to customer, or site-specific, documents.

Depending on the amount of information presented on your PPM Documentation Library home page and the number of documents that you include on this page, you may want to include the site-specific documents on the home page.

Note: If no documents are provided for both the supplemental product documents and the custom documents, the **Supplemental Information** section will not be displayed on the "home" page.

Figure 4-1. Library documents

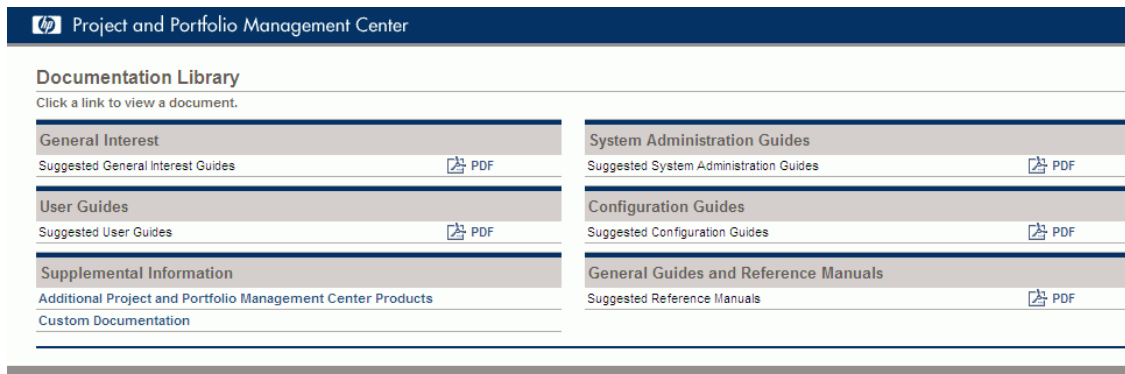


Figure 4-2. Supplemental product documents

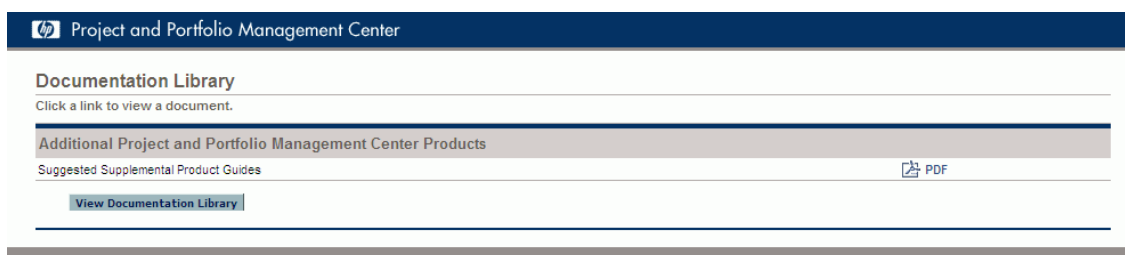
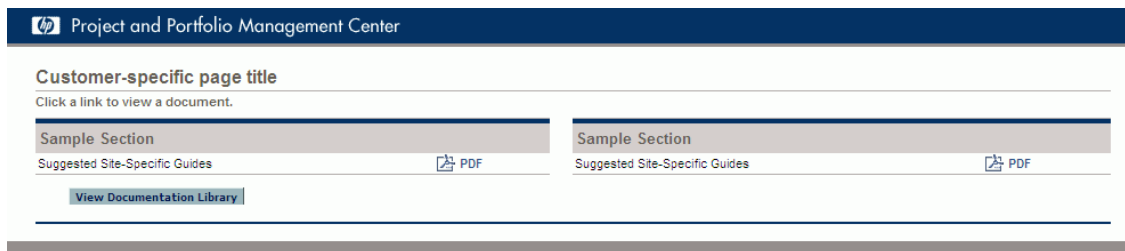


Figure 4-3. Custom, site-specific documents



XML and their corresponding DTD files control the information displayed on these PPM Documentation Library pages. This data includes the names and information for each of the documents as well as the general organization and group details. This data is then rendered using JavaScript files deployed on the PPM Server. Each category (Web page) has its own separate XML file as follows:

- Library.xml
- Cameo.xml
- Custom.xml

The structure of each of the XML files are similar; but, not necessarily identical. Before making changes to any XML file, it is important to understand the structure of the data and the resulting presentation of the information.

In addition to identifying the documents and customizing the XML files, the documents themselves must also be downloaded from the HP Software Product Manuals Web site (ovweb.external.hp.com/lpe/doc_serv) and copied to the appropriate directories on the PPM Server.

Tip: Remember to periodically check the HP Software Product Manuals Web site for new and updated documents.

The Release Notes provided with the Service Packs and Language Packs may also provide notifications of recently published documents.

Overview of the Library.xml File

The `Library.dtd` file defines the legal building blocks for the PPM Documentation Library "home" page.

The structure of the XML is as follows:

- **Sections.** Information is presented in two columns, using the left and right portions of the page.

This data uses the `<leftsection>` and `<rightsection>` elements.

Each section must include at least one group.

- **Groups.** Collections of related documents can be grouped in the left or right half of the page (such as **General Interest** or **Configuration Guides** as shown in "[Figure 4-1. Library documents](#)" on page 39).

This data uses the `<group>` element.

A group is composed of:

- Heading (using the `<head>` element)
 - Heading title (using the `<htitle>` element)
 - (Optional) Heading description (using the `<hdesc>` element)
 - (Optional) One or more subheadings (using the `<subhead>` element)
 - Subheading title (using the `<stitle>` element)
 - (Optional) Subheading description (using the `<sdesc>` element)
 - At least one document element.
- **Documents.** Titles and links that specify product documents (such as **Getting Started** and **Customizing the Standard Interface**) are presented within groups.

This data relies on the `<document>` element.

A document is composed of:

- Document title (using the `<dtitle>` element)
- Document file name (using the `<dfn>` element)

Specify the path of the file relative to the pdf directory (see ["Where to Find the Files" on page 46](#) for details on the PPM Server file organization).

- (Possibly optional) Document type (using the `<dtype>` element)

If the file format is not PDF, the file format must also be included (see ["Supported File Types" on page 45](#) for details).

If the file format is HTML (or HTM), also see the HTML link description.

- (Optional) HTML link (using the `<dhtml>` element)

Specify the path of the file relative to the pdf directory—this should mimic the text found within an HTML href attribute.

Use of this element makes the document's title appear as a hyperlink (instead of a linked icon). This is typically used when your document is available in both HTML and another format (such as PDF). In this event, include the `<dfn>`, `<dtype>`, and `<dhtml>` elements. The document will be displayed once, with the title hyperlinked to the HTML file and the applicable icon linked to the alternatively formatted file.

If your document is available in only HTML format, specify NONE (in upper case) for the document file name (the `<dfn>` element), and then use the `<dhtml>` element to specify the file to be linked to the document title.

- (Optional) Dates (using either the `<dpub>` or `<dupd>` element)

These dates are composed of:

- Month (using the `<month>` element in two-digit, numeric format)
- Day (using the `<day>` element in two-digit, numeric format)
- Year (using the `<year>` element in four-digit, numeric format)

For example:

```
<dpub>  
<month>08</month>  
<day>19</day>  
<year>2009</year>  
</dpub>
```

These are provided so that you can either specify the date when the document was "published" on your site, or the date it was "updated" on your site.

When either of these dates is within 30 days of the date on the client system, the **NEW** icon appears next to the entry for that document. To prevent stale data from being displayed when advising your users that there is new information, the **NEW** icon does not display after 30 days have elapsed (relative to the date on the client system).

For your convenience, the `Library.dtd` file is included in "[Sample Files](#)" on page 73. Minimally, the XML content for this Web page must include at least one group in each section (left and right), and at least one document must be included in each group.

Overview of the `Cameo.xml` File

The `Cameo.dtd` file defines the legal building blocks for the PPM Center supplemental product documents.

The structure of the XML is as follows:

- **Section.** Information is presented in one column.

This data uses the `<section>` element.

The section can include zero or more documents. If no documents are included the **Additional Project and Portfolio Management Center Products** will not appear in the **Supplemental Information** section of the "home" page of the PPM Documentation Library.

- **Documents.** Titles and links that specify supplemental product documents (such as **HP Deployment Management Extension for Oracle Technology Guide**) are presented in a single list.

This data relies on the `<document>` element.

A document is composed of:

- Document title (using the `<dtitle>` element)
- Document file name (using the `<dfn>` element)

Specify the path of the file relative to the `pdf` directory (see "[Where to Find the Files](#)" on page 46 for details on the PPM Server file organization).

- (Possibly optional) Document type (using the `<dtype>` element)

If the file format is not PDF, the file format must also be included (see "[Supported File Types](#)" on page 45 for details).

Note that HTML formatted files are not supported for this category.

For your convenience, the `Cameo.dtd` file is included in ["Sample Files" on page 73](#). The content for this XML file is optional; however, an “empty” file similar to the following *must* be provided.

```
<?xml version="1.0" ?>
<!DOCTYPE cameo SYSTEM "Cameo.dtd">
<cameo>
<section></section>
</cameo>
```

Overview of the Custom.xml File

The `Custom.dtd` file defines the legal building blocks for the site-specific documents.

The structure of the XML is as follows:

- **Sections.** Information is presented in two columns, using the left and right portions of the page.

This data uses the `<leftsection>` and `<rightsection>` elements. Each section must include at least one group.

- **Groups.** Collections of related categories of documents are presented in the left or right half of the page (such as **General Interest** or **Training**).

This data uses the `<group>` element.

A group is composed of:

- Heading (using the `<head>` element)
 - Heading title (using the `<htitle>` element)
 - (Optional) Heading description (using the `<hdesc>` element)
- (Optional) One or more subheadings (using the `<subhead>` element)
 - Subheading title (using the `<stitle>` element)
 - (Optional) Subheading description (using the `<sdesc>` element)
- At least one document element.
- **Documents.** Titles and links that specify site-specific documents (such as **Guidelines for managing resource pools** and **Analyzing Performance**) are presented within groups.

This data relies on the `<document>` element.

A document is composed of:

- Document title (using the `<dtitle>` element)
- Document file name (using the `<dfn>` element)

Specify the path of the file relative to the pdf directory (see ["Where to Find the Files" on the next page](#) for details on the PPM Server file organization).

- (Possibly optional) Document type (using the <dtype> element)

If the file format is not PDF, the file format must also be included (see ["Supported File Types" below](#) for details).

- **Title.** The name of the custom page can be uniquely specified (such as "XYZ Company" as shown in ["Figure 4-3. Custom, site-specific documents" on page 40](#)).

This data uses the <title> element.

For your convenience, the Custom.dtd file is included in ["Sample Files" on page 73](#). The content for this XML file is optional; however, an "empty" file similar to the following *must* be provided.

```
<?xml version="1.0" ?>
<!DOCTYPE custom SYSTEM "../Custom.dtd">
<custom>
<leftsection>
<group></group>
</leftsection>
<rightsection>
<group></group>
</rightsection>
<title></title>
</custom>
```

Supported File Types

A file type is specified so that the applicable icon appears next to the link for the file (as shown in ["Figure 4-5. Custom documentation page" on page 56](#)). The intent is to provide a visual cue, indicating the type of application needed on the client system to view the document.

Note: Specifying a file type does not ensure that the corresponding application is installed on the client—this is the responsibility of the user or the site's IT department.

The case-sensitive file type designators that have corresponding icons include the following file types:

- doc (for Microsoft Word files)
- pdf (for PDF files)
- ppt (for Microsoft PowerPoint files)
- txt (for text files)

- vid (for movie files, such as AVI)
- xls (for Microsoft Excel files)
- zip (for archive files)
- htm (for HTML formatted files)

The htm file type designation is supported only for custom, site-specific documents and its use is limited to the Custom.xml file. Do *not* specify this document type in Library.xml or Cameo.xml files.

If you want to host a file type that is not on this list, specify NONE (in upper case) for the file type.

Guidelines for Modifying the Library Files

Carefully consider each of the following recommendations whenever modifying the XML files:

- Before making any modifications, save a backup copy of the file and store it in a safe location.
- Do not make changes to the DTD, HTML, or JavaScript files that support the PPM Documentation Library.
- Changes to the CSS files for the PPM Documentation Library should be limited to rebranding activities.
- Make sure that the documents displayed on each PPM Documentation Library page are downloaded to the applicable location on the PPM Server and are accessible from the library.
- Always verify your changes, using both Microsoft Internet Explorer and Mozilla Firefox.

The PPM Documentation Library framework also includes a rudimentary set of verification pages for each of these XML files. These pages help determine whether any XML modifications conform to the DTD. These verification pages are merely preliminary test tools that can be used during the development of your customized pages.

Caution: Even if the verification page indicates that the XML is valid, this does not guarantee that the modified XML files will properly render.

You should always verify your changes with both Microsoft Internet Explorer and Mozilla Firefox.

Where to Find the Files

The PPM Documentation Library files are found in the <PPM_Home>/pdf directory, or one of its subdirectories. The <PPM_Home> placeholder represents the path where your PPM Center instance was installed. For example: xyzserver/E\$/PPMServer.

- The `Library.xml` and `Cameo.xml` (and their corresponding DTD and verification) files are found in `<PPM_Home>/pdf`.

- The English-language documents displayed on these Web pages should be stored in `<PPM_Home>/pdf/en`.

Translated documents should be stored in a corresponding language folder, which you will need to create. For example, German language documents should be stored in `<PPM_Home>/pdf/de`.

- The `Custom.xml` and verification files are found in `<PPM_Home>/pdf/Custom`.

The corresponding DTD file is found in `<PPM_Home>/pdf`.

- The site-specific documents displayed on this Web page should be stored in `<PPM_Home>/pdf/Custom`.

Working with the Library.xml File

To modify the documents shown on the "home" page of the PPM Documentation Library:

1. Copy the `<PPM_Home>/pdf/Library.xml` file to a "working" location, where the `<PPM_Home>` placeholder represents the path where your PPM Center instance was installed. For example: `xyzserver/E$/PPMServer`.

Remember that you should have a backup copy of this file stored in a safe location.

2. Edit the temporary version of the XML file as desired, ensuring that it conforms to the DTD, as described in ["Working with the Library.xml File" above](#).

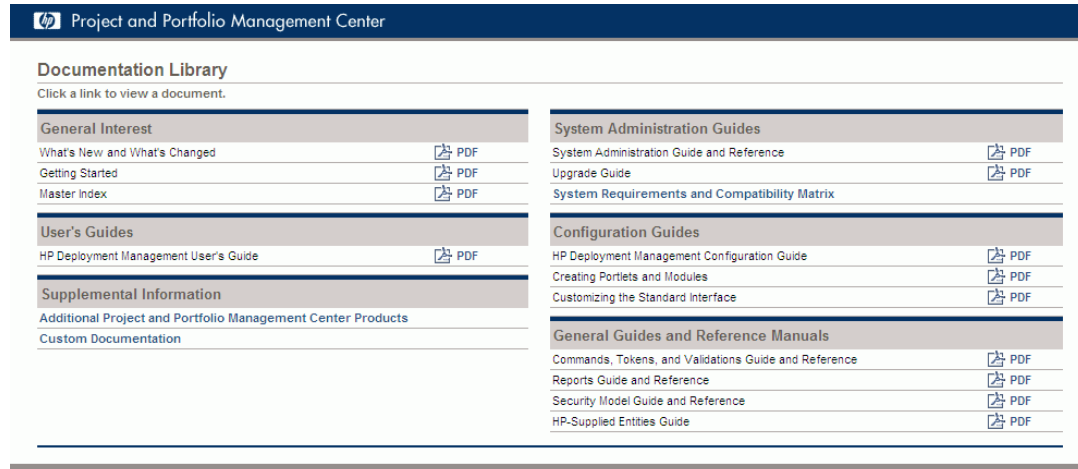
Remember that this file must include at least one group in each section (left and right), and at least one document must be included in each group.

You must include the `<document>` element for each document you want displayed.

In rare cases, an existing group or subgroup may not include any documents, making it feasible to remove the `<group>` or `<subhead>` elements.

Alternatively, when there are several documents within a group, you may want to divide the group into subgroups. Conversely, when a collection of subgroups contains very few documents, you may want to remove the subgrouping.

For example, assume that your site licensed only HP Deployment Management, does not use the Document Management module, and did not upgrade from a prior version of PPM Center. One possible presentation of this information is as follows.



```
<?xml version="1.0" ?>
<!DOCTYPE library SYSTEM "Library.dtd">

<library>

<leftsection>

  <group>
    <head>
      <htitle>General Interest</htitle></head>

    <document>
      <dtitle>What's New and What's Changed</dtitle>
      <dfn>en/WhatsNew.pdf</dfn>
    </document>

    <document>
      <dtitle>Getting Started</dtitle>
      <dfn>en/GetStart</dfn>
    </document>

    <document>
      <dtitle>Master Index</dtitle>
      <dfn>en/MasterIndex.pdf</dfn>
    </document>
  </group>

  <group>
    <head>
      <htitle>User's Guides</htitle></head>
```



```
<document>
  <dttitle>HP Deployment Management User's Guide</dttitle>
  <dfn>en/DeployUG.pdf</dfn>
</document>

</group>
</leftsection>
<rightsection>
  <group>
    <head>
      <htitle>System Administration Guides</htitle></head>
    <document>
      <dttitle>System Administration Guide and Reference</dttitle>
      <dfn>en/SysAdmin.pdf</dfn>
    </document>
    <document>
      <dttitle>Upgrade Guide</dttitle>
      <dfn>en/Upgrade.pdf</dfn>
    </document>
    <document>
      <dttitle>System Requirements and Compatibility Matrix</dttitle>
      <dfn>NONE</dfn>
      <dhtm>en/DLC.htm</dhtm>
    </document>
  </group>
  <group>
    <head>
      <htitle>Configuration Guides</htitle></head>
    <document>
      <dttitle>HP Deployment Management Configuration Guide</dttitle>
      <dfn>en/DeployCG.pdf</dfn>
    </document>
    <document>
      <dttitle>Creating Portlets and Modules</dttitle>
      <dfn>en/ConfigSI.pdf</dfn>
    </document>
    <document>
      <dttitle>Customizing the Standard Interface</dttitle>
      <dfn>en/CustomSI.pdf</dfn>
    </document>
  </group>
```

```
<group>
  <head>
    <h1>General Guides and Reference Manuals</h1></head>

  <document>
    <dtitle>Commands, Tokens, and Validations Guide and Reference</dtitl
e>
    <dfn>en/CmdTokVal.pdf</dfn>
  </document>

  <document>
    <dtitle>Reports Guide and Reference</dtitle>
    <dfn>en/Reports.pdf</dfn>
  </document>

  <document>
    <dtitle>Security Model Guide and Reference</dtitle>
    <dfn>en/Security.pdf</dfn>
  </document>

  <document>
    <dtitle>HP-Supplied Entities Guide</dtitle>
    <dfn>en/Entities.pdf</dfn>
  </document>
</group>
</rightsection>
</library>
```

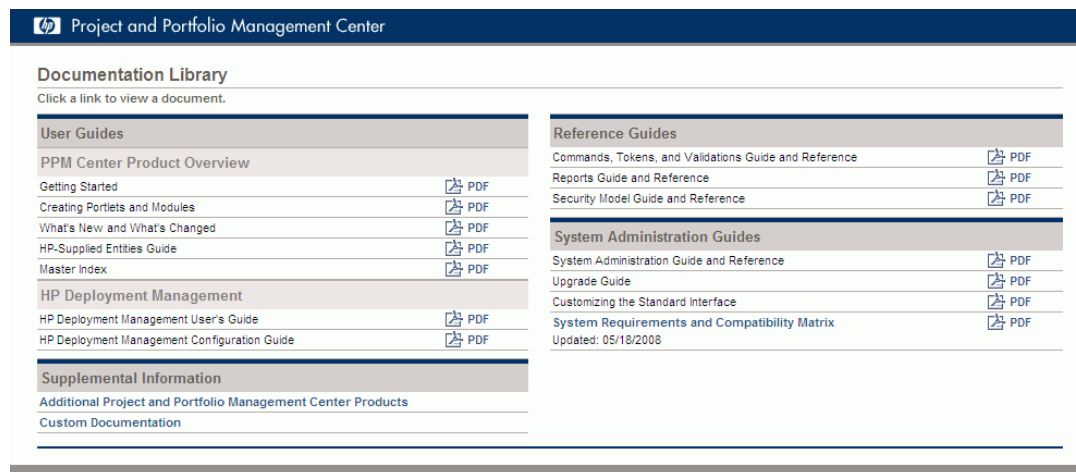
3. Save and close the file.
4. Copy the updated XML file to its original location on the PPM Server, overwriting the existing file.

You should also place a copy of this updated file in a safe location where it does not overwrite the original (or any previously updated) file.

5. Ensure that each of the files you specified exists in the applicable directory on the PPM Server (typically, `<PPM_Home>/pdf/en`).
6. Verify your changes by opening the PPM Documentation Library page.

Caution: Test the updated PPM Documentation Library using both Microsoft Internet Explorer and Mozilla Firefox.

Given the flexibility of the XML elements, you might prefer to organize the documents similar to the following:



This example uses the following Library.xml file.

```
<?xml version="1.0" ?>
<!DOCTYPE library SYSTEM "Library.dtd">
<library>
<leftsection>
  <group>
    <head>
      <h1>User Guides</h1></head>
    <subhead>
      <stitle>PPM Center Product Overview</stitle></subhead>
    <document>
      <dtitle>Getting Started</dtitle>
      <dfn>en/GetStart</dfn>
    </document>
    <document>
      <dtitle>Creating Portlets and Modules</dtitle>
      <dfn>en/ConfigSI.pdf</dfn>
    </document>
    <document>
      <dtitle>What's New and What's Changed</dtitle>
      <dfn>en/WhatsNew.pdf</dfn>
    </document>
    <document>
      <dtitle>HP-Supplied Entities Guide</dtitle>
      <dfn>en/Entities.pdf</dfn>
    </document>
  </group>
  <group>
    <head>
      <h1>Reference Guides</h1></head>
    <document>
      <dtitle>Commands, Tokens, and Validations Guide and Reference</dtitle>
      <dfn>en/CommandsTokensValidationsGuide.pdf</dfn>
    </document>
    <document>
      <dtitle>Reports Guide and Reference</dtitle>
      <dfn>en/ReportsGuide.pdf</dfn>
    </document>
    <document>
      <dtitle>Security Model Guide and Reference</dtitle>
      <dfn>en/SecurityModelGuide.pdf</dfn>
    </document>
  </group>
  <group>
    <head>
      <h1>System Administration Guides</h1></head>
    <document>
      <dtitle>System Administration Guide and Reference</dtitle>
      <dfn>en/SystemAdministrationGuide.pdf</dfn>
    </document>
    <document>
      <dtitle>Upgrade Guide</dtitle>
      <dfn>en/UpgradeGuide.pdf</dfn>
    </document>
    <document>
      <dtitle>Customizing the Standard Interface</dtitle>
      <dfn>en/CustomizingStandardInterface.pdf</dfn>
    </document>
    <document>
      <dtitle>System Requirements and Compatibility Matrix</dtitle>
      <dfn>en/SystemRequirementsCompatibilityMatrix.pdf</dfn>
    </document>
  </group>
  <supplemental>
    <dtitle>Additional Project and Portfolio Management Center Products</dtitle>
    <dfn>en/AdditionalProducts.pdf</dfn>
  </supplemental>
  <dtitle>Custom Documentation</dtitle>
  <dfn>en/CustomDocumentation.pdf</dfn>
</leftsection>
</library>
```

```
<document>
  <dttitle>Master Index</dttitle>
  <dfn>en/MasterIndex.pdf</dfn>
</document>

<subhead><stitle>HP Deployment Management</stitle></subhead>

<document>
  <dttitle>HP Deployment Management User's Guide</dttitle>
  <dfn>en/DeployUG.pdf</dfn>
</document>

<document>
  <dttitle>HP Deployment Management Configuration Guide</dttitle>
  <dfn>en/DeployCG.pdf</dfn>
</document>
</group>
</leftsection>
<rightsection>
  <group>
    <head>
      <htitle>Reference Guides</htitle></head>
    <document>
      <dttitle>Commands, Tokens, and Validations Guide and Reference</dttitle>
e>
      <dfn>en/CmdTokVal.pdf</dfn>
    </document>
    <document>
      <dttitle>Reports Guide and Reference</dttitle>
      <dfn>en/Reports.pdf</dfn>
    </document>
    <document>
      <dttitle>Security Model Guide and Reference</dttitle>
      <dfn>en/Security.pdf</dfn>
    </document>
  </group>
  <group>
    <head>
      <htitle>System Administration Guides</htitle></head>
    <document>
      <dttitle>System Administration Guide and Reference</dttitle>
      <dfn>en/SysAdmin.pdf</dfn>
    </document>
    <document>
      <dttitle>Upgrade Guide</dttitle>
```

```
<dfn>en/Upgrade.pdf</dfn>
</document>

<document>
  <dttitle>Customizing the Standard Interface</dttitle>
  <dfn>en/CustomSI.pdf</dfn>
</document>

<document>
  <dttitle>System Requirements and Compatibility Matrix</dttitle>
  <dfn>en/SysReqs.pdf</dfn>
  <dhtml>en/DLC.htm</dhtml>
  <dupd>
    <month>05</month>
    <day> 18</day>
    <year>2008</year>
  </dupd>
</document>
</group>

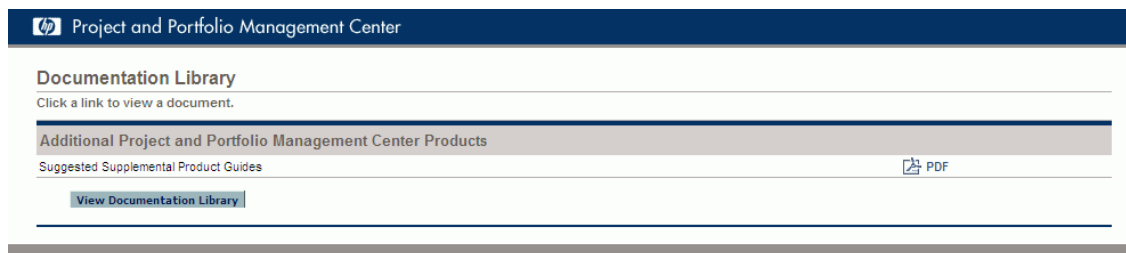
</rightsection>

</library>
```

Working with the Cameo.xml File

Several software packages are offered by HP that complement the PPM Center product. This includes an assortment of Extensions, Migrators, Adapters, Accelerators, and integration suites, plus their documentation. These products typically include documentation is available from the PPM Download Center only (and not installed on the PPM Server). It is often desirable to make these documents available to all PPM Center users, while having them isolated on a separate Web page, as shown in "Figure 4-4. Supplemental product documentation page" below. Alternatively, these documents can be included on the PPM Documentation Library home page.

Figure 4-4. Supplemental product documentation page



To include or modify supplemental product documentation so that it is accessible from the **Additional Project and Portfolio Management Center Products** link in the **Supplemental Information** section of the PPM Documentation Library home page:

1. Copy the `<PPM_Home>/pdf/Cameo.xml` file to a working location, so that the `<PPM_Home>` placeholder represents the path where your PPM Center instance was installed. For example: `xyzserver/E$/PPMServer`.

Remember that you should have a backup copy of this file stored in a safe location.

2. Edit the temporary version of the XML file as desired, ensuring that it conforms to the DTD as described in ["Working with the Cameo.xml File" on the previous page](#).

You must include the `<document>` element for each document you want displayed.

Tip: If the file type is PDF, the `<dtype>` element does not have to be included.

If, for example, you were adding documentation for the HP Deployment Management Extension for Oracle E-Business Suite and HP Deployment Management Extension for Oracle Technology, the XML file would be similar to the following:

```
<?xml version="1.0" ?>
<!DOCTYPE cameo SYSTEM "Cameo.dtd">
<cameo>
  <section>
    <document>
      <dtitle>HP Deployment Management Extension for Oracle E-Business Suite
Guide</dtitle>
      <dfn>en/ExtOracleEB.pdf</dfn>
      <dtype>pdf</dtype>
    </document>
    <document>
      <dtitle>HP Deployment Management Extension for Oracle Technology Guide
</dtitle>
      <dfn>en/ExtOracleT.pdf</dfn>
    </document>
  </section>
</cameo>
```

3. Save and close the file.
4. Copy the updated XML file to its original location on the PPM Server, overwriting the existing file.

You should also place a copy of this updated file in a safe location where it does not overwrite the original (or any previously updated) file.

5. Ensure that each of the files you specified exists in the applicable directory on the PPM Server (typically, <PPM_Home>/pdf/en).
6. Verify the changes by opening the PPM Documentation Library page and clicking **Additional Project and Portfolio Management Center Products** in the **Supplemental Information** group.

Caution: Test the updated PPM Documentation Library using both Internet Explorer and Mozilla Firefox.

The resulting supplemental product documentation page would be similar to that shown in "[Figure 4-4. Supplemental product documentation page](#)" on page 53.

Tip: If you ever want to discontinue listing supplemental products documents, create an "empty" Cameo.xml file as described in "[Working with the Cameo.xml File](#)" on page 53.

Use of this file will remove the **Additional Project and Portfolio Management Center Products** link in the **Supplemental Information** group.

If the Cameo.xml file does not include any documents and Custom.xml file does not include any documents, the **Supplemental Information** group is not displayed.

Working with the Custom.xml File

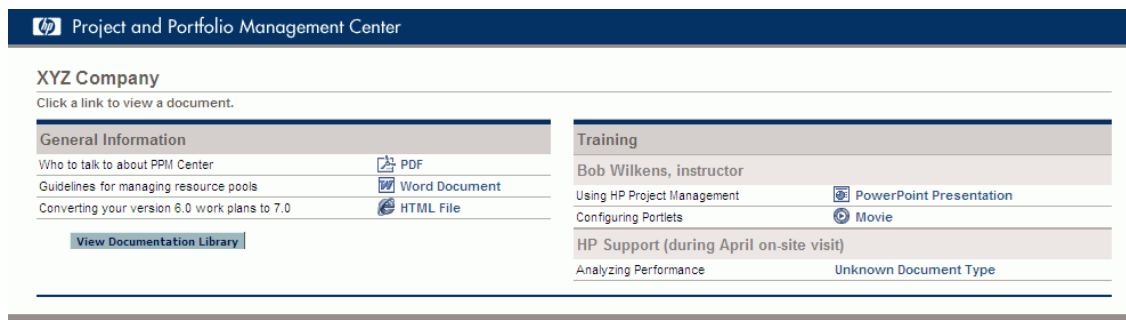
PPM Center users often create unique, site-specific documents relating to the product and its use within the enterprise.

You can host these site-specific documents on the PPM Server and make these documents available to all PPM Center users, while having them isolated on a separate Web page. See "[Figure 4-5. Custom documentation page](#)" on the next page. Alternatively, these documents can be included on the PPM Documentation Library home page.

Your choice of topics depends on the needs of your PPM Center users and what documents have been developed for your site. Some examples are:

- Lists of PPM Center contacts
- Processes and procedures for using PPM Center
- Microsoft PowerPoint presentations
- Conversion guides
- Guidelines for PPM Center application configuration, development, and use

Figure 4-5. Custom documentation page



To include or modify site-specific documentation so that it is accessible from the **Custom Documentation** link in the **Supplemental Information** section of the PPM Documentation Library home page:

1. Copy the `<PPM_Home>/pdf/Custom/Custom.xml` file to a "working" location, where the `<PPM_Home>` placeholder represents the path where your PPM Center instance was installed. For example: `xyzserver/E$/PPMServer`.

Remember that you should have a backup copy of this file stored in a safe location.

2. Edit the temporary version of the XML file and ensure that it conforms to the DTD, as described in ["Working with the Custom.xml File" on the previous page](#).

Remember that this file must include at least one group in each left and right section.

You must include the `<document>` element for each document you want displayed and it must be included in a group or subgroup.

In rare cases, an existing group or subgroup may not include any documents, so then you can remove the `<group>` or `<subhead>` elements.

Alternatively, when there are several documents within a group, you may want to divide the group into subgroups. Conversely, when a collection of subgroups contains very few documents, you may want to remove the subgrouping.

For example, assume that your site has the following documents that you want to have accessible from the PPM Documentation Library:

Title	Filename
Who to talk to about PPM Center	who.pdf
Guidelines for managing resource pools	respool.doc
Converting your version 7.5 work plans to 8.0	workplans.htm

Title	Filename
Using HP Project Management	Project.ppt
Configuring Portlets	Portlets.vid
Analyzing Performance	perf.ppm

One possible presentation of this information would be as follows:

```
<?xml version="1.0" ?>
<!DOCTYPE custom SYSTEM "../Custom.dtd">
<custom>

  <leftsection>

    <group>

      <head>
        <htitle>General Information</htitle></head>

      <document>
        <dtitle>Who to talk to about PPM Center</dtitle>
        <dfn>who.pdf</dfn>
        <dtype>pdf</dtype>
      </document>

      <document>
        <dtitle>Guidelines for managing resource pools</dtitle>
        <dfn>respool.doc</dfn>
        <dtype>doc</dtype>
      </document>

      <document>
        <dtitle>Converting your version 7.5 work plans to 8.0</dtitle>
        <dfn>workplans.htm</dfn>
        <dtype>htm</dtype>
      </document>

    </group>
  </leftsection>

  <rightsection>

    <group>

      <head>
        <htitle>Training</htitle></head>

      <subhead>
        <stitle>Bob Wilkens, instructor</stitle></subhead>
```

```
<document>
  <dttitle>Using HP Project Management</dttitle>
  <dfn>Project.ppt</dfn>
  <dtype>ppt</dtype>
</document>

<document>
  <dttitle>Configuring Portlets</dttitle>
  <dfn>Portlets.vid</dfn>
  <dtype>vid</dtype>
</document>

<subhead>
  <stitle>HP Support (during April on-site visit)</stitle>
</subhead>

<document>
  <dttitle>Analyzing Performance</dttitle>
  <dfn>perf.ppm</dfn>
  <dtype>unknown</dtype>
</document>

</group>
</rightsection>

<title>XYZ Company</title>
</custom>
```

3. Save and close the file.
4. Copy the updated XML file to its original location on the PPM Server, overwriting the existing file.

You should also place a copy of this updated file in a safe location where it does not overwrite the original (or any previously updated) file.

5. Ensure that each of the files you specified exists in the appropriate directory on the PPM Server.
6. Verify your changes by opening the PPM Documentation Library page and clicking **Custom Documentation** in the **Supplemental Information** group to view your changes.

Caution: Test the updated page using both Internet Explorer and Mozilla Firefox.

The resulting custom documentation page would be similar to ["Figure 4-5. Custom documentation page" on page 56](#).

Tip: If you ever want to discontinue listing site-specific product documents, create an empty `Custom.xml` file, as described in ["Working with the Custom.xml File" on page 55](#).

Use of this file will remove the **Custom Documentation** link in the **Supplemental Information** group.

If the `Cameo.xml` file does not include any documents and `Custom.xml` file does not include any documents, the **Supplemental Information** group is not displayed.

Chapter 5: Advanced Topics

- ["Component Overview" below](#)
- ["Identifying CSS Files and Class Definitions" below](#)
- ["Where to Find the Files" on page 62](#)
- ["Modifying JSP Files" on page 63](#)

Component Overview

In the event the information provided in earlier chapters of this guide have not provided you with the details needed to customize your PPM Center instance as desired, the following information should help.

Identifying CSS Files and Class Definitions

To identify the CSS files and class definitions used for a particular page, view the page. Use the "View Source" capability of your Web browser to identify the cascading style sheet files and class definitions pertinent to any page of PPM Center you are viewing.

Example: Finding Information for a PPM Dashboard Page

In this example, assume that you are considering changing the format for the title of the Budget by Business Objective portlet (which could potentially change the formatting for all portlet titles).

To identify the cascading style sheet and class definition:

1. Log on to PPM Center.
2. Navigate to a PPM Dashboard page that contains the Budget by Business Objective portlet.
3. View the HTML source for the page.
 - From Microsoft Internet Explorer, select **View > Source**.
 - From Mozilla Firefox, select **View > Page Source**.
4. Search the HTML source for the string "Budget by Business Objective" (the title of the portlet as it appears on the page) until you find something similar to the following text:

```
<td class='page-title page-title-spacing title-line'>  
<span id='visiblePortletTitle'>Budget by Business Objective</span>
```

From this HTML snippet you can determine that the class definitions you want to evaluate include the string *visiblePortletTitle*.

5. Search backwards in the HTML source for the string "CSS" that is associated with PPM Dashboard style sheets until you find something similar to the following text:

```
<link rel=stylesheet href='/dashboard/static/arch/css/df-all.cssx?USER_LOCAL
E=en_us' type='text/css' />
<link rel=stylesheet href='/itg/web/knta/css/PortletSpacing.css' type='text/
css'>
<link rel=stylesheet href='/itg/web/knta/dsh/css/Portlet.css' type='text/cs
s'>
```

From this HTML snippet you can determine that the class definition is likely to be in either the *df-portal.css*, *portlet.css*, or *portlet-extensions.css* file in the *dashboard.war* directory. If the class definitions are not found in any of these CSS files, repeat this step until you locate the information.

To make changes to the PPM Dashboard-related cascading style sheet requires a number of steps. See ["Modifying Style Sheets" on page 13](#) for details.

Example: Finding Information for a Non-Dashboard Page

For this example, assume that you are considering changing the Sign Out button borders.

To identify the cascading style sheet and class definition:

1. Log on to PPM Center.
2. From any page in the standard interface, view the HTML source for the page.
 - From Microsoft Internet Explorer, select **View > Source**.
 - From Mozilla Firefox, select **View > Page Source**.
3. Search the HTML source for the string "SIGN OUT" (the text that appears on the button itself) until you find something similar to the following text:

```
<td><span class='signOutBtn1'><a href="javascript:onLogout()">SIGN OUT</a></
span></td>
```

From this HTML snippet you can determine that the class definition you want to evaluate includes the string *signOutBtn1*.

4. Search backwards in the HTML source for the string "CSS" until you find something similar to the following text:

```
<link rel=stylesheet href='/itg/web/knta/global/css/GlobalStyleSheet.css' ty
pe='text/css'>
```

From this HTML snippet you can determine that the class definition is likely to be found in the `GlobalStyleSheet.css` which is found in the `itg/web/knta/global/css` folder on your PPM Server. If the class definition is not found in this CSS files, repeat this step until you locate the information.

Make any changes to the appearance of the Sign Out button in the `span.signOutBtn1` (or `signOutBtn1`) class definition in the `GlobalStyleSheet.css` file.

Tip: Whenever you make changes to a button, you should also evaluate the colors used for any anchor pseudo-class definitions.

Where to Find the Files

To customize the standard interface, you need to edit the cascading style sheet and image files stored in various directories on the PPM Server.

Based on the areas identified in "[Figure 1-1. PPM Center banner and menu areas](#)" on page 8 through "[Figure 1-3. Non-Dashboard area](#)" on page 9, the customizable files are generally found in the following locations.

Note that the following placeholder may have been used to describe portions of the paths for files described in this chapter.

<code><PPM_Home></code>	represents the path where your PPM Center instance was installed. For example: <code>xyzserver/E\$/PPMServer</code> .
<code><PPM_Server_Name></code>	represents the name assigned to your PPM Server during installation. For example: <code>xyzProduction</code> . (This corresponds to the <code>KINTANA_SERVER_NAME</code> <code>server.conf</code> parameter value and does not necessarily reflect the host name of the server.)

- Image files (in English)
 - `<PPM_Home>/pdf/images/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/html/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/images/common/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/images/pm/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/images/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/images/en/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/new/img/`

Plus, in the `dashboard.war` directory:

- `static/arch/images/`
- CSS files
 - `<PPM_Home>/pdf/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/css/common/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/css/pm/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/htmlTemplates/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/rpt/css/`
 - `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/new/css/`

Plus, in the `dashboard.war` directory:

- `static/arch/css/`

Modifying JSP Files

Modifying the common header and footer JSP pages is another way to change the look and feel of the standard interface. The following is a list of the most common JSP pages:

- `Header.jsp`. Determines the look of the menu bar and header for most pages.
- `Footer.jsp`. Determines the look of the footer for most pages.
- `SimpleHeader.jsp`. A simple version of the normal header JSP page used for pages that do not need a menu bar.
- `SimpleFooter.jsp`. A simple version of the normal footer JSP page used for pages that do not need a footer.

JSP page files are found in the directory:

```
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/
```

JSP Page Definitions

It is possible to modify the look and feel by changing your JSP page definitions. JSP pages are dynamic HTML documents, which are interpreted by the PPM Center JSP engine prior to being presented to a Web browser.

Before you change your JSP files, note the following points:

- JSP files contain tag-like entries, such as:

```
<knta:I18NGetBundle bundleName="KEXP_Resources" />
```

These tags are not standard HTML tags. The tags act as placeholders where the JSP engine should insert information known at the time of the user's request on the server side.

- JSP files often contain Java™ code that sends and retrieves data from the PPM Server, or pulls information stored in the user's session.
- JSP files may also contain client-side JavaScript. JSP files often use dynamically-provided information in client-side JavaScript (<SCRIPT language='Javascript'> tags).

Guidelines for Modifying JSP Pages

HP recommends the following practices when editing the global JSP files:

- JSP files should be edited in a plain-text editor, or a Web-authoring tool that supports JSP and JavaScript tags.
- Never edit the live JSP files directly on the production system. Changes to these files are immediately reflected in the system. Any error in modifying these files can prevent access to the system for all users.
- Be methodical when making changes to the JSP files. Save changes frequently. Check them by reloading the relevant screen in the browser. You may need to reconfigure the browser to prevent page caching.
- Avoid Java code changes unless there is an explicit open API to use. All other Java code changes are not supported.
- HP recommends that you apply the standard development processes for documentation and source control when changing any JSP page and related files.

Header.jsp File

The common header file, `Header.jsp`, affects the standard interface layout. `Header.jsp` divides the page into three main sections:

- Menu bar
- Navigation path (the "bread crumbs" presented directly below the menu bar)
- Page content (for non-Dashboard pages)

Every time `Header.jsp` gets called, the navigation path, menu bar, and page content are generated. By default, any pages that include the `Header.jsp` will get the navigation path and the menu bar. However, it is possible to control whether the menu bar or navigation path should be displayed, and also the background color of the page.

- **Menu bar.** The variable, `displayMenuFlag`, sets whether the menu bar should be displayed.
 - Set `displayMenuFlag` to `True` to display the menu bar.
 - Set `displayMenuFlag` to `False` so that the menu bar is not displayed.
- **Navigation path.** If a page is to be loaded in a window (using `request.getParameter("IS_WINDOID")== 'Y'`) then both the menu and navigation path will not appear.
- **Background color.** You can modify the background color of the page by changing the `background-color` element to a suitable value in the following line:

```
<table style="width: 100%; background-color: #003366;">
```

Then, restart the server.

Caution: Every page that contains the `Header.jsp` file must also include the `Footer.jsp` file.

Making Changes to Specific Pages

JSP files can reference the CSS files, as follows:

- Directly, such as the `PortletPersonalization` style sheet shown in the following example:

```
<link rel=stylesheet href='<%=localeCtrl.getCSSFileName("../global/css/PortletPersonalization.css", request)%>' type='text/css'>
```

- By reference, such as the global style sheet file shown in the following example:

```
<link rel=stylesheet href='<%=localeCtrl.getCSSFileName(AddressLink.GLOBAL_STYLE_SHEET, request) %>' type='text/css'>
```

`GlobalStyleSheet.css` is the global style sheet used throughout much of the standard interface. The `GlobalStyleSheet.css` file is found in the following directory:

```
<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/web/knta/global/css
```

- By inference, through the use of "include" files as described in ["Example: JSP, CSS, and the Standard Interface" below](#). In this case, you need to examine the "included" file, searching for the CSS file there.

Example: JSP, CSS, and the Standard Interface

To demonstrate how JSP and CSS files interact with each other (and appear in the standard interface), consider the `Create New Request` page. The `Create New Request` page is a JSP page in the standard interface. The appearance of the **Request Type** field is governed by a CSS file.

- In the JSP RequestCreateList.jsp file:

```
<td class='field-prompt' nowrap><span>Request Type:</span></td>
```

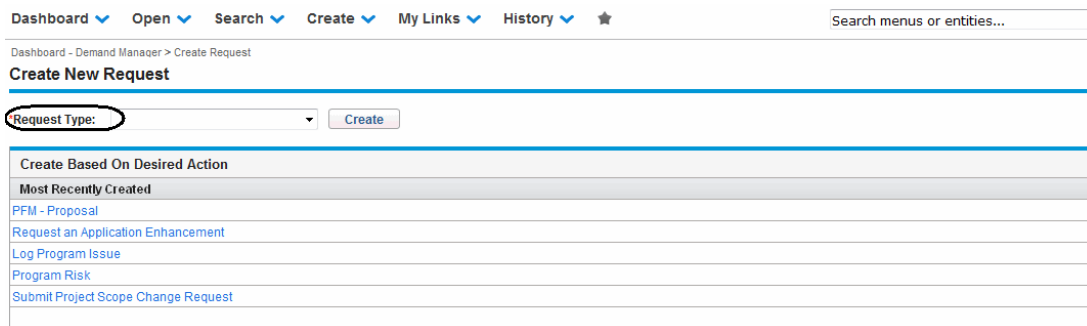
- In the CSS GlobalStyleSheet.css file:

```
.field-prompt  
{  
    font-family: Arial, Verdana, sans-serif;  
    font-size: 11px;  
    font-weight: bold;  
    color: #000000;  
    padding-right: 10px;  
    padding-top: 5px;  
    padding-bottom: 5px;  
}
```

- In the standard interface:

"Figure 5-1. Field prompt example" below shows the **Request Type** field in the Create New Request page.

Figure 5-1. Field prompt example



Appendix A: Color Names

This appendix provides the table of color names that are supported by most browsers.

It is important to note that only 16 color names are supported in the W3C HTML 4.0 standard (aqua, black, blue, fuchsia, gray, green, lime, maroon, navy, olive, purple, red, silver, teal, white, and yellow). If you have concerns about browser compatibility, or are planning to export a portlet, you should use the hexadecimal values rather than the color names.

To view the colors themselves, point your browser to www.w3.org/TR/css3-color/#html4 and locate the section documenting "SVG color keywords."

TableA-1.Color names

Color Name	Hex Value
AliceBlue	#F0F8FF
AntiqueWhite	#FAEBD7
Aqua	#00FFFF
Aquamarine	#7FFFD4
Azure	#F0FFFF
Beige	#F5F5DC
Bisque	#FFE4C4
Black	#000000
BlanchedAlmond	#FFEBCD
Blue	#0000FF
BlueViolet	#8A2BE2
Brown	#A52A2A
BurlyWood	#DEB887
CadetBlue	#5F9EA0
Chartreuse	#7FFF00
Chocolate	#D2691E
Coral	#FF7F50
CornflowerBlue	#6495ED
Cornsilk	#FFF8DC
Crimson	#DC143C

TableA-1.Color names, continued

Color Name	Hex Value
Cyan	#00FFFF
DarkBlue	#00008B
DarkCyan	#008B8B
DarkGoldenrod	#B8860B
DarkGray	#A9A9A9
DarkGreen	#006400
DarkKhaki	#BDB76B
DarkMagenta	#8B008B
DarkOliveGreen	#556B2F
DarkOrange	#FF8C00
DarkOrchid	#9932CC
DarkRed	#8B0000
DarkSalmon	#E9967A
DarkSeaGreen	#8FBC8F
DarkSlateBlue	#483D8B
DarkSlateGray	#2F4F4F
DarkTurquoise	#00CED1
DarkViolet	#9400D3
DeepPink	#FF1493
DeepSkyBlue	#00BFFF
DimGray	#696969
DodgerBlue	#1E90FF
Feldspar	#D19275
FireBrick	#B22222
FloralWhite	#FFFAF0
ForestGreen	#228B22

TableA-1.Color names, continued

Color Name	Hex Value
Fuchsia	#FF00FF
Gainsboro	#DCDCDC
GhostWhite	#F8F8FF
Gold	#FFD700
GoldenRod	#DAA520
Gray	#808080
Green	#008000
GreenYellow	#ADFF2F
HoneyDew	#F0FFF0
HotPink	#FF69B4
IndianRed	#CD5C5C
Indigo	#4B0082
Ivory	#FFFFFF0
Khaki	#F0E68C
Lavender	#E6E6FA
LavenderBlush	#FFF0F5
LawnGreen	#7CFC00
LemonChiffon	#FFFACD
LightBlue	#ADD8E6
LightCoral	#F08080
LightCyan	#E0FFFF
LightGoldenrodYellow	#FAFAD2
LightGrey	#D3D3D3
LightGreen	#90EE90
LightPink	#FFB6C1
LightSalmon	#FFA07A

TableA-1.Color names, continued

Color Name	Hex Value
LightSeaGreen	#20B2AA
LightSkyBlue	#87CEFA
LightSlateBlue	#8470FF
LightSlateGray	#778899
LightSteelBlue	#B0C4DE
LightYellow	#FFFFE0
Lime	#00FF00
LimeGreen	#32CD32
Linen	#FAF0E6
Magenta	#FF00FF
Maroon	#800000
MediumAquamarine	#66CDAA
MediumBlue	#0000CD
MediumOrchid	#BA55D3
MediumPurple	#9370D8
MediumSeaGreen	#3CB371
MediumSlateBlue	#7B68EE
MediumSpringGreen	#00FA9A
MediumTurquoise	#48D1CC
MediumVioletRed	#C71585
MidnightBlue	#191970
MintCream	#F5FFFA
MistyRose	#FFE4E1
Moccasin	#FFE4B5
NavajoWhite	#FFDEAD
Navy	#000080

TableA-1.Color names, continued

Color Name	Hex Value
OldLace	#FDF5E6
Olive	#808000
OliveDrab	#6B8E23
Orange	#FFA500
OrangeRed	#FF4500
Orchid	#DA70D6
PaleGoldenrod	#EEE8AA
PaleGreen	#98FB98
PaleTurquoise	#AFEEEE
PaleVioletRed	#D87093
PapayaWhip	#FFEFD5
PeachPuff	#FFDAB9
Peru	#CD853F
Pink	#FFC0CB
Plum	#DDA0DD
PowderBlue	#B0E0E6
Purple	#800080
Red	#FF0000
RosyBrown	#BC8F8F
RoyalBlue	#4169E1
SaddleBrown	#8B4513
Salmon	#FA8072
SandyBrown	#F4A460
SeaGreen	#2E8B57
SeaShell	#FFF5EE
Sienna	#A0522D

TableA-1.Color names, continued

Color Name	Hex Value
Silver	#C0C0C0
SkyBlue	#87CEEB
SlateBlue	#6A5ACD
SlateGray	#708090
Snow	#FFFAFA
SpringGreen	#00FF7F
SteelBlue	#4682B4
Tan	#D2B48C
Teal	#008080
Thistle	#D8BFD8
Tomato	#FF6347
Turquoise	#40E0D0
Violet	#EE82EE
VioletRed	#D02090
Wheat	#F5DEB3
White	#FFFFFF
WhiteSmoke	#F5F5F5
Yellow	#FFFF00
YellowGreen	#9ACD32

Appendix B: Sample Files

ColorPalette.css Portlet Color Specification File

The following is an example of the CSS file that controls the colors used in the portlets within PPM Center. This file can be customized to specify the color associated with individual portlet field labels.

```
colorPalette {
    color: '#a674a6';
    color: '#6db4bf';
    color: '#dc8c38';
    color: '#add930';
    color: '#9478cd';
    color: '#76c7f1';
    color: '#f170b1';
    color: '#ffb95c';
    color: '#c9f1f1';
    color: '#75b000';
    color: '#3ca9e1';
    color: '#ffd512';
    color: '#e0b7e0';
    color: '#d9802d';
    color: '#5991ed';
    color: '#e6c077';
    color: '#f67255';
    color: '#cd95da';
    color: '#8da6b7';
    color: '#bca5d0';
    color: '#9e987d';
    color: '#fcc28c';
    color: '#84d62b';
    color: '#6663b8';
    color: '#ffa42e';
    color: '#118bd9';
    color: '#b5cdf6';
    color: '#e884f3';
    color: '#95d1e7';
    color: '#d54a2c';
}
```

Library.dtd File

The following is the DTD file used in conjunction with the "home" page of the PPM Documentation Library.

```
<!ELEMENT library      (leftsection, rightsection) >
<!ELEMENT leftsection  (group+)>
<!ELEMENT rightsection (group+)>
```

```
<!ELEMENT group      (head, (subhead?, document+)+)>
<!ELEMENT head       (htitle, hdesc?)>
<!ELEMENT subhead    (stitle, sdesc?)>
<!ELEMENT document   (dtitle, dfn, dtype?, dhtm?, (dpub|dupd)?)>
<!ELEMENT htitle     (#PCDATA)>
<!ELEMENT hdesc      (#PCDATA)>
<!ELEMENT stitle     (#PCDATA)>
<!ELEMENT sdesc      (#PCDATA)>
<!ELEMENT dtitle     (#PCDATA)>
<!ELEMENT dfn        (#PCDATA)>
<!ELEMENT dtype      (#PCDATA)>
<!ELEMENT dhtm       (#PCDATA)>
<!ELEMENT dpub       (month,day,year)>
<!ELEMENT dupd       (month,day,year)>
<!ELEMENT month      (#PCDATA)>
<!ELEMENT day        (#PCDATA)>
<!ELEMENT year       (#PCDATA)>
<!ELEMENT flag       (#PCDATA)>
```

Custom.dtd File

The following is the DTD file used in conjunction with the site-customized page of the PPM Documentation Library.

```
<!ELEMENT custom      (leftsection, rightsection, title) >
<!ELEMENT leftsection (group+)>
<!ELEMENT rightsection (group+)>
<!ELEMENT group       (head, (subhead?, document+)+)*>
<!ELEMENT head        (htitle, hdesc?)>
<!ELEMENT subhead     (stitle, sdesc?)>
<!ELEMENT document    (dtitle, dfn, dtype)>
<!ELEMENT title       (#PCDATA)>
<!ELEMENT htitle      (#PCDATA)>
<!ELEMENT hdesc       (#PCDATA)>
<!ELEMENT stitle      (#PCDATA)>
<!ELEMENT sdesc       (#PCDATA)>
<!ELEMENT dtitle      (#PCDATA)>
<!ELEMENT dfn         (#PCDATA)>
<!ELEMENT dtype       (#PCDATA)>
<!ELEMENT dhtm        (#PCDATA)>
```

Cameo.dtd File

The following is the DTD file used in conjunction with the supplemental product documentation page of the PPM Documentation Library.

```
<!ELEMENT cameo       (section) >
<!ELEMENT section     (document*)>
<!ELEMENT document    (dtitle, dfn, dtype?)>
<!ELEMENT dtitle      (#PCDATA)>
```

```
<!ELEMENT dfn          (#PCDATA)>  
<!ELEMENT dtype       (#PCDATA)>
```

We appreciate your feedback!

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

Feedback on Customizing the Standard Interface (Project and Portfolio Management Center 9.20)

Just add your feedback to the email and click send.

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