



Project and Portfolio Management Center

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Creating Portlets and Modules

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Chapter 1: Getting Acquainted with the Standard Interface

Introduction to the Standard Interface

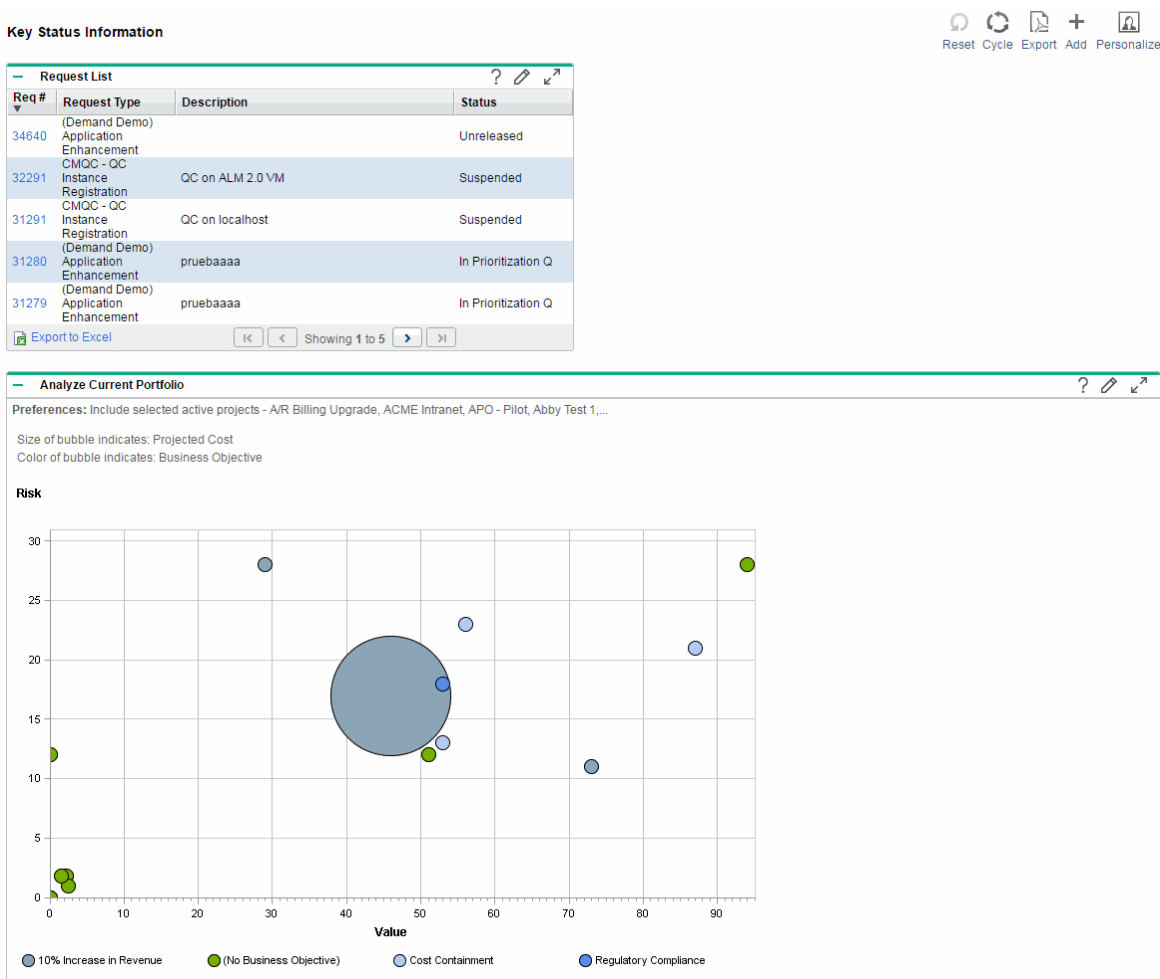
Most Project and Portfolio Management Center (PPM Center) users work solely in the standard interface, although some may use the PPM Workbench as well. The standard interface opens in your Web browser, and from it, you can run reports, create requests, and search for packages, among other things.

A key feature of PPM Center is the PPM Dashboard, which provides you with a real-time view into your PPM Center–based activities.

Using the PPM Dashboard's portlets, you can view almost anything, from the status of requests assigned to you, to comparisons between current projects and staffing profiles. ["Figure 1-1.](#)

[Personalized PPM Dashboard page"](#) on the next page shows a PPM Dashboard page that relies on two HPE-supplied portlets: Request List and Analyze Current Portfolio.

Figure 1-1. Personalized PPM Dashboard page



When you first log on to PPM Center, you are presented with a PPM Dashboard page. The PPM Dashboard page displayed is determined by the system administrator (if your system administrator has configured a default landing page) or how you personalized your pages. HPE provides a PPM Dashboard page named Front Page (Standard PPM Dashboard).

For more information about logging on to PPM Center, see the *Getting Started* guide.

Overview of Creating Portlets and Modules

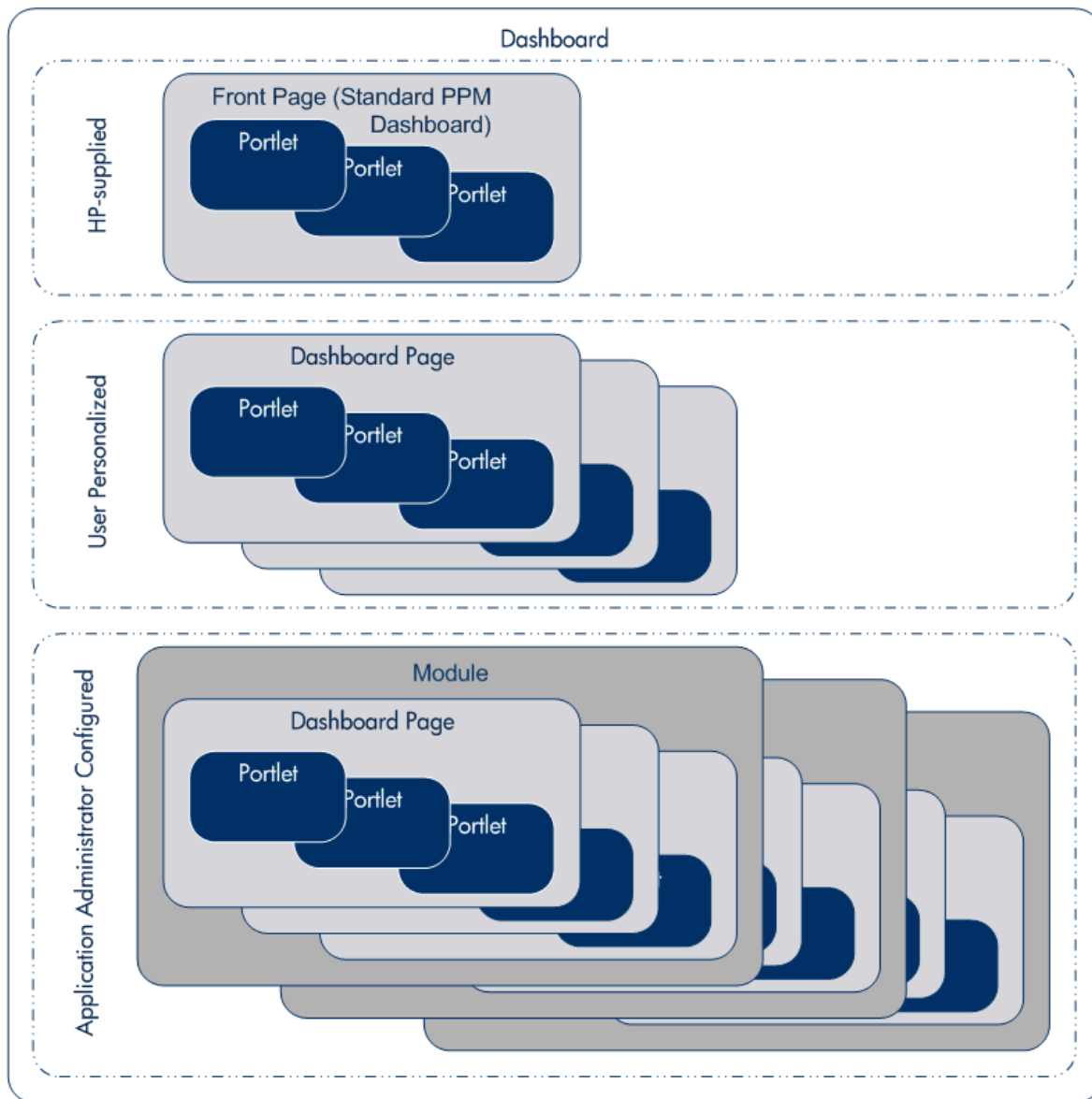
Managers (or other lead personnel) can create, maintain, and share *configured* Dashboard pages and portlets to facilitate communication and coordination for their own projects. For example, your recruiting organization might share the list of current job openings.

Configuring the standard interface in this manner provides a mechanism for managers to share real-time information up and/or down the chain of command.

Note: The individuals who plan, set up, and maintain HPE-based applications are generally called application administrators (or configurators) and their responsibilities may also include configuring PPM Dashboard pages.

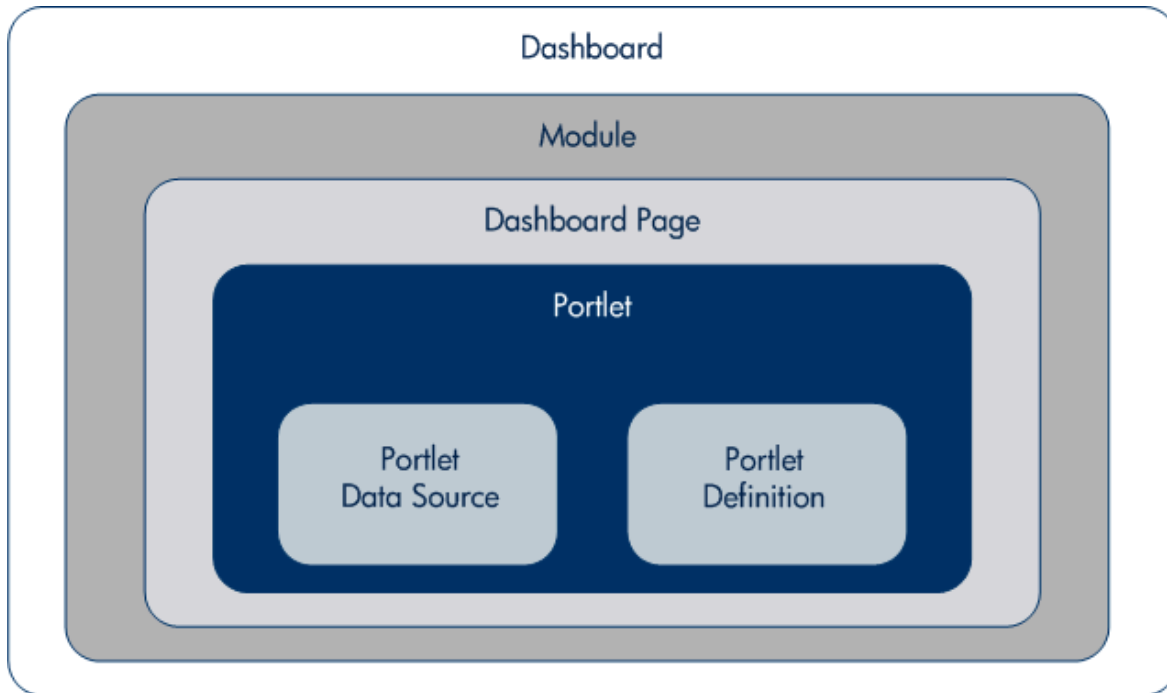
" [Figure 1-2. Various types of PPM Dashboard pages](#)" on the next page provides a visual overview of the different types of Dashboard pages. Personalizing the pre-installed Dashboard page or creating new (user-specific) Dashboard pages are detailed in the *Getting Started* document. Part I of this document focuses on the application administrator-configured Dashboard pages; however, "[Creating and Maintaining PPM Dashboard Pages and Modules](#)" on [page 119](#) briefly describes how users can add preconfigured Dashboard pages.

Figure 1-2. Various types of PPM Dashboard pages



"Figure 1-3. PPM Dashboard components" on the next page details the major components that make up configured Dashboard pages and depicts their relationships.

Figure 1-3. PPM Dashboard components



- **Dashboard.** The PPM Dashboard is one of the key applications provided with PPM Center.
In addition to the pre-installed Front Page and optional user-personalized Dashboard pages, the PPM Dashboard can include one or more modules.
- **Module.** A module is the container for one or more Dashboard pages.
Modules are created much like a Dashboard page which is personalized by an individual user. Modules are created by application administrators.
- **Dashboard page.** A Dashboard page is the container for one or more portlets.
Dashboard pages within a module can be added, modified, and deleted. Similarly, on each Dashboard page, portlets can be added, modified, or deleted.
- **Portlet.** Portlets are the key visualization component of the PPM Dashboard and display information relevant to your PPM Center data. HPE provides numerous portlets and additional (personalized or configured) portlets can be created.
In general, portlets rely on the following:
 - **Portlet data sources.** For some portlets, these are typically the SQL queries used to gather the information from the PPM Center database. Other data sources include Web pages and RSS feeds.
 - **Portlet definitions.** These define the look and feel of a portlet and can be customized. Portlet

definitions can include such information as the type of portlet, data source, display options such as labels and columns to display, layout, user and group access to the portlet, and filter field definitions.

Standards-Based Portlet Support

PPM Center is a Java™-compliant portal, and provides support for Java-compliant portlets that are not included with PPM Center. Java portlets can be developed using the Java API, purchased from vendors (such as Sun Microsystems), or obtained with products (such as WebLogic Portal).

WSRP-compliant portlets are also supported by PPM Center. Web Services for Remote Portlets (WSRP) allows portals to publish portlets so that other portals can "consume" them. Use of WSRP portlets simplifies integration between systems and can reduce programming overhead as well as provide continuity for users of multiple systems.

Note: PPM Center provides support for JSR 168 and WSRP standards-compliant portlets. This support is based on the Apache Reference implementations of two specifications: Pluto and WSRP4J. However, the specifications may not be complete in all areas or may be open to interpretation. HPE has made design decisions to cover these areas.

HPE is committed to provide support for customers implementing these types of portlets, including debugging and diagnosing problems related to the PPM Dashboard. HPE does not extend that support to cover the debugging of custom portlet code or configuration files.

To facilitate diagnosis, customers reporting problems to the HPE Software Support Web site (hp.com/go/hpssoftwaresupport) are required to provide a simple, reproducible case that demonstrates the error in the PPM Dashboard.

The Configuration Process

Configuring the standard interface requires steps relating to both creating portlets and making them available. In general, the process is as follows:

Step 1: Create a portlet.

1. Create a portlet data source. See "[Creating and Maintaining Portlet Data Sources](#)" on page 13 for specifics.

2. Create a portlet definition. See ["Creating and Maintaining Portlet Definitions" on page 32](#) for more information.

Step 2: Create and share a module and its Dashboard page(s).

See ["Creating and Maintaining PPM Dashboard Pages and Modules" on page 119](#) to learn more about these topics.

Related Information

The following documents also include information related to creating and sharing portlets and modules:

- *Commands, Tokens, and Validations Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*

The following documents also provide insights into the user experience with PPM Dashboard pages:

- *Customizing the Standard Interface*
- *Getting Started*

Chapter 2: Creating and Maintaining Portlet Data Sources

Overview of Portlet Data Sources

Portlet data sources contain the following components:

- The filter fields found on the edit page for the portlet.
- The permissions allowing editing of the portlet data source.
- The SQL query used by the portlet definition to retrieve data from the PPM Center database.

A portlet data source SQL query consists of the following:

- **SELECT/FROM.** This statement is used to select columns from the designated database table.

These columns are used by the portlet definition, such as a column in a list portlet or the x-axis in a bubble chart portlet.

For example:

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V
```

- **WHERE.** This clause is used to specify selection criterion.

For example:

```
WHERE LOCKED_FLAG="Y"
```

- **GROUP BY or ORDER BY.** These keywords are used to aggregate or sort the result.

For example:

```
ORDER BY OBJECT_TYPE
```

The following is a complete SQL query for a portlet data source:

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

Portlet definitions and portlet data sources have the following relationships:

- A portlet definition can be linked to only one portlet data source.
- A portlet data source can be linked to multiple portlet definitions.

Portlet data sources are constructed using the Data Source Workbench (sometimes called the Data Source Builder).

From the Data Source Workbench you can:

- Search for and view portlet data sources; see "[Searching For and Viewing Existing Portlet Data Sources](#)" below.
- Create new portlet data sources or modify existing ones; see "[Creating or Modifying Portlet Data Sources](#)" on the next page.
- Use existing portlet data sources as the basis for new portlet data sources; see "[Copying Portlet Data Sources](#)" on page 25.
- Delete existing portlet data sources; see "[Deleting Portlet Data Sources](#)" on page 26.
- View portlet definition usage; see "[Viewing Portlet Definition Usage](#)" on page 26.

Note: HPE-supplied portlet data sources can be copied but cannot be modified or deleted.

Searching For and Viewing Existing Portlet Data Sources

To search for a portlet data source:

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

The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

4. On the **Query** tab, provide the search criteria.

Tip: To display all portlet data sources, click **List** without providing any search criteria.

5. Click **List**.

The **Results** tab appears, displaying the results of the search.

6. (Optional) To view a portlet data source, either:
 - Double-click a portlet data source.
 - Select a portlet data source and click **Open**.

Tip: Use the **Shift** or **Ctrl** keys to select multiple portlet data sources.

The Data Source : *<Data Source Name>* window opens.

Creating or Modifying Portlet Data Sources

To update an existing portlet data source, or to create an entirely new portlet data source:

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

The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

4. Do one of the following:
 - Create an entirely new portlet data source:
 - On the **Query** tab, click **New Data Source**.
 - On the **Results** tab, click **New**.
 - Modify an existing portlet data source:
 - View the portlet data source (as described in "[Searching For and Viewing Existing Portlet Data Sources](#)" on the previous page).

Note: HPE-supplied portlet data sources cannot be modified.

The Data Source : *<Data Source Name>* window opens.

5. Provide information for each of the following areas before proceeding to the next step.
 - **General information.** Use these fields to set general information regarding the portlet data source, such as the name of the portlet data source, reference code, and its description. See

["Completing the General Information Section" on the next page](#) for details.

- **Data Source.** Use this tab to define the columns of the portlet data source and create the SQL query. See ["Completing the Data Source Tab" on page 18](#) for details.
- **Filter Fields.** Use this tab to create the filter fields found on a portlet's edit page. See ["Completing the Filter Fields Tab" on page 23](#) for details.
- **Ownership.** Use this tab to set who can edit the portlet data source. See ["Completing the Ownership Tab" on page 24](#) for details.

Note: The **Portlet Definitions** tab is used to identify which portlet definitions rely on this portlet data source. A new portlet data source will not have any portlet definitions associated with it.

This tab is detailed in ["Viewing Portlet Definition Usage" on page 26](#).

6. (Optional) At any time, you can click **Save** to commit your changes. See the tip following ["Table 2-1. Portlet data source general information field descriptions" on the next page](#) for additional considerations and suggestions.

You can also click **Cancel** to discard any changes. However, if you have provided a unique **Data Source Name** and clicked **Save** (at least once), the portlet data source has been created with the information provided as of the last **Save**.

7. (Optional, although highly recommended) On the Data Source : *<Data Source Name>* window, click **Verify** to validate the SQL statement.

Make any necessary corrections to the SQL by clicking **Edit Query** on the **Data Source** tab.

8. Click **OK** to save your changes and close the window.

The Data Source : *<Data Source Name>* window closes and the Data Source Workbench is updated.

Tip: On the **Results** tab, click **Data Source Name** to have the portlet data sources appear in alphabetical sequence. Clicking **Data Source Name** a second time reverses the sort order.

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

Completing the General Information Section

To complete (or update) the general information area of the Data Source : *<Data Source Name>* window:

1. Provide the settings using the information from the following table.

Table 2-1. Portlet data source general information field descriptions

| Field Name (*Required) | Description |
|---------------------------|---|
| *Data Source Name | Specify a unique name for the portlet data source. Type any alphanumeric string. 1-3 <<Reviewer: What is the maximum string length?>> |
| *Reference Code | A default value is provided, but you may specify a unique name for the data source reference code. PPM Center uses this code to identify specific entity types. This code does not change, regardless of whether its name is changed or translated. |
| Time-out | Select the timeout to use. Choices include: <ul style="list-style-type: none">◦ Use Default◦ Data Source Specific |
| Seconds | The number of seconds to wait before the portlet data source's query times out. If the Time-out field has a value of Use Default , this field displays the default time-out value used. If the Time-out field has a value of Data Source Specific , specify the time-out value. Type any integer greater than zero. |
| Description | Specify a description for the portlet data source. Type any alphanumeric string. |
| Enabled | Indicate whether or not this portlet data source is available for use. |

Tip: To allow incremental saving of your settings without impacting any users, set the **Enabled** field to **No** when initially defining the portlet data source. Once the portlet data

source definition is complete, reset this field to **Yes**.

2. (Optional) Click **Save** to commit these changes.

Completing the Data Source Tab

To complete (or update) the **Data Source** tab of the Data Source : *<Data Source Name>* window:

1. Set **Use Bind Variables**.

The **Use Bind Variables** option should be set to **Yes**, except when:

- Any of the filter fields are multi-select-enabled.
- The portlet query statement includes tokens.

2. Click **Edit Query**.

The Query Definition window opens.

3. Provide the following information before proceeding to the next step.

- **Select/From**. Use this tab to create the columns and add the SELECT and FROM clauses for the SQL query. See ["Completing the Select/From Tab" below](#) for details.
- **Where/Filter**. (Optional) Use this tab to add WHERE clauses to the SQL query. See ["Completing the Where/Filter Tab" on page 20](#) for details.
- **Group By/Order By**. (Optional) Use this tab to add GROUP BY or ORDER BY clauses. See ["Completing the Group By/Order By Tab" on page 21](#) for details.

4. (Optional) Click **View Full Query** to see the entire SQL query—the composite of the information from each of the tabs.
5. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

Completing the Select/From Tab

The **Select/From** tab allows you to construct the SQL query the portlet data source executes.

- **Select.** This statement identifies one or more columns to be included in the query.

For example, the following shows a complete SQL query for a portlet data source (the **SELECT** statement portion of the SQL query is shown in italics):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

- **From.** This clause selects the table from which the columns are selected.

For example, the following shows a complete SQL query for a portlet data source (the **FROM** clause portion of the SQL query is shown in italics):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

To complete (or update) the **Select** section on the **Select/From** tab in the Query Definition window:

1. (Optional) To change the settings for any existing column:

- a. Select a column.
- b. Click **Edit** in the **Select** section.

The Data Source Column. <Column Name> window opens.

- c. The information that should be provided depends on the Column Type. See ["Supplemental Details for the Data Source Column Window" on page 27](#) for the details associated with each column type.
- d. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.

2. (Optional) To include a new column.

- a. Click **Add** in the **Select** section.

The Data Source Column: New window opens.

- b. The information that should be provided depends on the Column Type. See ["Supplemental Details for the Data Source Column Window" on page 27](#) for the details associated with each column type.
- c. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.

3. Repeat [Step 1](#) and [Step 2](#) until all the desired columns are included.
4. In the **From Clause** section of the **Select/From** tab of the Query Definition window, complete the associated clause.

This is a free-form SQL entry area.

Tip: Click **Enlarge** to create a larger text entry field.

5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

Completing the Where/Filter Tab

The **Where/Filter** tab allows you to construct the SQL query the portlet data source executes.

- **Where.** This clause is used to specify the selection criteria.

For example, the following shows a complete SQL query for a portlet data source (the WHERE clause portion of the SQL query is shown in italics):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

- **Filter.** This clause is used to specify the filter fields that appear on the portlet's edit page.

Note: Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a PPM Dashboard user.

Filter field values can be used in the SQL by using the token name P.TOKEN_NAME or VP.TOKEN_NAME.

To complete (or update) the **Where Clause** section on the **Where/Filter** tab in the Query Definition window:

1. Complete the associated clause.

The **Where Clause** section defines the WHERE clause of the portlet query.

This is a free-form SQL entry area.

Tip: Click **Enlarge** to create a larger text entry field.

2. (Optional) Change the settings for an existing filter field:

- a. Select a filter field.
- b. Click **Edit** in the **Filter Fields** section.

The Filter: *<Filter Field>* window opens.

- c. Provide the data as detailed in ["Completing the Filter Fields Tab" on page 23](#).
- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

3. Include a new filter field:

- a. Click **New** in the **Filter Fields** section.

The Filter: New window opens.

Note: Adding filter fields here has the same results as adding filter fields using the **Filter Fields** tab as the Data Source : *<Data Source Name>* window.

The difference in the two areas is how the information is visually displayed.

- In the **Filter Fields** section of the Query Definition window, the SQL clauses are displayed.
- On the **Filter Fields** tab of the Data Source : *<Data Source Name>* window, the PPM Center entities are displayed.

- b. Provide the data as detailed in ["Completing the Filter Fields Tab" on page 23](#).
 - c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.
4. Repeat [Step 2](#) and [Step 3](#) until all the desired filter fields are included.
 5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

Completing the Group By/Order By Tab

The **Group By/Order By** tab allows you to refine the SQL query the portlet data source executes.

- **GROUP BY.** Adds a keyword to aggregate the result.
- **ORDER BY.** Adds a keyword to sort the result.

For example, the following shows a complete SQL query for a portlet data source (the ORDER BY portion of the SQL query is shown in italics):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

To complete (or update) the **Group By/Order By** tab in the Query Definition window:

1. In the **Group By Clause** section, provide the GROUP BY or ORDER BY terms.

This is a free-form SQL entry area.

2. In the **Having Clause** section, provide the HAVING terms.

This is a free-form SQL entry area.

3. In the **Default Order By Clause** section, provide the default ORDER BY terms.

This is a free-form SQL entry area.

4. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

Limitation

If the data source SQL is in the following format:

```
SELECT A, B
FROM Table_C
WHERE X=Y
ORDER BY D
```

and if E is nullable or has non-unique values, custom portlets return unpredictable results when sorted by columns containing duplicated values.

This issue is caused by a known limitation of Oracle row_number() function.

To work around this issue, you should add additional columns with unique values or rowid of the tables in the "from" clause to the "order by" clause. For example:

```
SELECT A, B
FROM Table_C
WHERE X=Y
ORDER BY D, E
```

and E should be rowid or a column in Table_C with unique value.

Note: You can add more than one column to the "order by" clause when no column with unique value or rowid is applicable. For performance sake, it is recommended that you add columns with index.

Completing the Filter Fields Tab

To complete (or update) the Filter Fields tab in the Data Source : *<Data Source Name>* window:

1. (Optional) To change the settings for an existing filter field:

- a. Select a filter field.
- b. Click **Edit**.

The Filter: *<Filter Field>* window opens.

- c. Provide the filter criteria using the information from the following table.

Note: Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a PPM Dashboard user.

Filter field values can be used in the SQL by using the token name P . TOKEN_NAME or VP . TOKEN_NAME.

| Field Name (*Required) | Description |
|---------------------------|--|
| *Field Name | Specify a name for the filter field that should be shown in the portlet's edit page. Type any alphanumeric string. |
| *Token | Specify the token for the filter field. |
| Description | Specify a description for the filter field. Type any alphanumeric string. |
| *Validation | Select the validation for the filter field. Choices are limited to those validations available on your PPM Center instance. |
| Multiselect | Indicate whether or not the filter field is enabled for multi-select. |
| Required | Indicate whether or not the filter field is required on the portlet's edit page. |
| Enabled | Indicates whether or not the filter field is enabled. |
| *When this filter has | Single quotation marks ('), including those that may be embedded in |

| Field Name (*Required) | Description |
|------------------------------------|---|
| a value, append to Where Clause | a variable, cannot be used in the When this filter has a value, append to Where Clause filter field. |

- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.
2. (Optional) To include a new filter field:
 - a. Click **New**.

The Filter: New window opens.
 - b. Provide the filter criteria using the information from the previous table.
 - c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.
3. Repeat [Step 1](#) and [Step 2](#) until all the desired filter fields are included.
4. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

Completing the Ownership Tab

Only members of the security groups specified in the Ownership window can edit, copy, or disable a specific portlet. If a security group is disabled or the System: Edit Portlet Definition access grant is removed, that group no longer has access to the portlet.

If no ownership groups are associated with the entity, the entity is considered global and any user with the proper edit access grant for the entity can edit, copy, or disable it. Users with the System: Ownership Override access grant can access configuration entities even if the user is not a member of one of the ownership groups and does not have the specific edit access grant.

Note: For more information concerning access grants, refer to the *Security Model Guide and Reference*.

To complete (or update) the **Ownership** tab in the Data Source : *<Data Source Name>* window:

1. Indicate whether to allow changes to the portlet data source to be made by:
 - All users with the System: Edit Portlet Definition access grant
 - Only groups listed below that have the System: Edit Portlet Definition access grantUse the **Add** and **Remove** buttons to refine the list of allowed users.
2. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

Copying Portlet Data Sources

To create a new portlet data source using an existing portlet data source as the basis:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Dashboard > Data Sources**.
The Data Source Workbench opens.
4. Search for and select a portlet data source (see "[Searching For and Viewing Existing Portlet Data Sources](#)" on page 14).
5. Click **Copy**. The Copy Data Source window opens.
6. In the **Data Source Name** field, specify a unique name for the portlet data source.
In the Reference Code field, specify a unique reference code for the portlet data source.

Note: If your PPM Center instance supports multiple languages and the data source is defined in a language other than your session language, the **Copy existing translations** checkbox is enabled. To copy all of the content that is translated for the data source, select this checkbox. To copy only the content that has been translated to your session language, do not select the checkbox. For more information, see *Multilingual User Interface Guide*.
7. Click **Copy**. The Question window opens.
8. Click **Yes** if you would like to edit the portlet data source. Otherwise, click **No**.
9. (Optional) If you clicked **Yes** in the previous step, modify the portlet data source using the information described in "[Creating or Modifying Portlet Data Sources](#)" on page 15.

Deleting Portlet Data Sources

Note: HPE-supplied portlet data sources cannot be deleted.

To delete an existing portlet data source:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench**.
The PPM Workbench opens.
3. From the shortcut bar, select **Dashboard > Data Sources**.
The Data Source Workbench opens.
4. Search for and select one or more portlet data sources (see "[Searching For and Viewing Existing Portlet Data Sources](#)" on page 14).
5. Click **Delete**.
The Question window opens.
6. Click **Yes** to remove the portlet data source(s). Otherwise, click **No**.
If you clicked **Yes**, the Data Source Workbench is updated (and the deleted portlet data source no longer appears in the list).

Viewing Portlet Definition Usage

The **Portlet Definitions** tab allows you to view all of the portlet definitions currently linked to the portlet data source.

From the Portlet Data Source window, on the **Portlet Definitions** tab, you can:

- View all of the portlet definitions linked to the portlet data source.
Remember that portlet definitions and portlet data sources have the following relationships:
 - A portlet definition can be linked to only one portlet data source.
 - A portlet data source can be linked to multiple portlet definitions.
- Open the portlet definition by clicking on the portlet definition name. This opens the Portlet

Definition wizard. The Portlet Definition wizard is populated with the information for the selected portlet definition.

- Create a new portlet definition by clicking **New Portlet Definition**. This opens the Portlet Definition wizard.

Supplemental Details for the Data Source Column Window

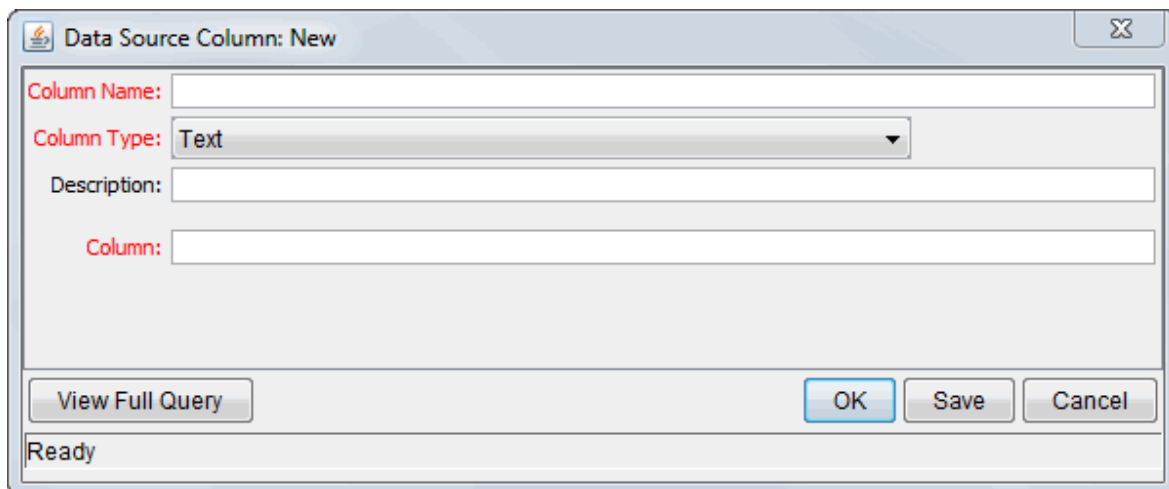
Adding columns to the Query Definition window relies on the Data Source Column window. The fields of the Data Source Column window vary, depending on the column type selected.

See the associated details for the following column types:

- Text, Date, Number, or Summary Condition/Exception, see ["Text-Based Column Types Details" below](#)
- Hyperlink, see ["Hyperlink Column Type Details" on page 29](#).
- Currency, see ["Currency Column Type Details" on page 30](#).

Text-Based Column Types Details

Figure 2-7. Text-based column types in Data Source Column window



The screenshot shows a dialog box titled "Data Source Column: New". It contains the following fields and controls:

- Column Name:** A text input field.
- Column Type:** A dropdown menu currently set to "Text".
- Description:** A text input field.
- Column:** A text input field.
- Buttons:** "View Full Query", "OK", "Save", and "Cancel".
- Status Bar:** Displays "Ready".

Table 2-2. Text-based column types field descriptions

| Field Name (*Required) | Description |
|------------------------|--|
| *Column Name | Specify the name of the column. Type any alphanumeric string. |
| *Column Type | Select one of the following: <ul style="list-style-type: none"> • Text • Date • Number • Summary Condition/Exception |
| Description | Specify a brief description of the column. Type any alphanumeric string. |
| *Column | Specify the database column name used for the column. Choices are limited to the column names available on your PPM Center instance. Note: The type of the database column specified should match the Column Type selected. If the types do not match, sorting of this column in the portlet may not behave as expected (sorting is based on the type of the database column). For example, if you select a Column Type of Number, but the type of the database column is text, sorting of this column in the portlet is based on text rather than numbers. Use a function, such as <code>to_number</code> , to change the database column type to match the selected Column Type. |

Hyperlink Column Type Details

Figure 2-8. Hyperlink column type in the Data Source Column window

The screenshot shows a dialog box titled "Data Source Column: New". It contains several input fields and buttons. The "Column Name" field is empty. The "Column Type" dropdown is set to "Hyperlink". The "Description" field is empty. The "Hyperlink Type" dropdown is set to "Request Detail Page". The "Entity ID Column" field is empty. The "Hyperlink" field contains the text "[DSH.PRT.ENTITY_ID]". At the bottom, there are four buttons: "View Full Query", "OK", "Save", and "Cancel". Below the buttons is a status bar that says "Ready".

Table 2-3. Hyperlink column type field description

| Field Name (*Required) | Description |
|------------------------|--|
| *Column Name | Specify the name of the column. Type any alphanumeric string. |
| *Column Type | Select Hyperlink . |
| Description | Specify a brief description of the column. Type any alphanumeric string. |
| *Hyperlink Type | Select the type of hyperlink to create from this column. Choices include: <ul style="list-style-type: none">• Request Detail Page• Package Detail Page• Task Detail Page• Project Detail Page• Project Overview Page• Custom Hyperlink When Custom Hyperlink is selected, the Hyperlink field becomes editable and required. |

Table 2-3. Hyperlink column type field description, continued

| Field Name (*Required) | Description |
|------------------------|---|
| | Otherwise, the Hyperlink field is read-only and displays a preview of the link that is created (for example, <code>/itg/crt/RequestDetail.jsp?REQUEST_ID= [PRT.ENTITY_ID]</code>). |
| *Entity ID Column | <p>Specify the SQL expression used to make a column in the final query.</p> <p>This column should contain values which are Request IDs (such as, Request Detail Page type Hyperlinks).</p> <p>In the case of the Custom Hyperlink, the values from this column are used to resolve the token <code>PRT.ENTITY_ID</code>, which can be used in the text of the hyperlink.</p> |
| *Hyperlink | <p>Specify the actual hyperlink text, which should be of one of the following forms:</p> <ul style="list-style-type: none"> • <code><PPM_Home>/some/page</code> • <code>http://machine.server.com/page.html</code> <p>The valid tokens are <code>DSH.PRT.ENTITY_ID</code>, <code>DSH.PRT.ENTITY_ID.TO_URL</code>, and <code>SYS.USERNAME</code>.</p> |

Currency Column Type Details

Figure 2-9. Currency column type in the Data Source Column window

The screenshot shows a dialog box titled "Data Source Column: New". It contains several input fields and buttons. The "Column Name" field is empty. The "Column Type" dropdown menu is set to "Currency". The "Description" field is empty. The "Base Value Column" field is empty. The "Currency ID Column" field is empty. The "Local Value Column" field is empty. At the bottom, there are three buttons: "View Full Query", "OK", "Save", and "Cancel". The status bar at the bottom left says "Ready".

Table 2-4. Currency column type field descriptions

| Field Name (*Required) | Description |
|------------------------|--|
| *Column Name | Specify the name of the column. Type any alphanumeric string. |
| *Column Type | Select Currency . |
| Description | Specify a brief description of the column. Type any alphanumeric string. |
| *Base Value Column | Specify the column (that displays in the currency column) whose values are costs in the base currency. These values are displayed if the user has configured their PPM Dashboard to show costs in the system's base currency. For this column to sort correctly, it must be a number. If necessary, use the function <code>to_number</code> to change the value to a number. |
| Currency ID Column | Specify the column whose values are the ID of the local currency. This value is never displayed; however, it is used to determine how the local currency value (see " Local Value Column " below) is formatted. |
| Local Value Column | Specify the column (that displays in the currency column) whose values are costs in the local currency. These values are displayed (and formatted appropriately for the specified currency) if the user has configured their PPM Dashboard to show costs in the local currency. That is, the user must select Local Currency from the Dashboard Cost Display section from the Edit My Profile page (Open > Administration > Edit My Profile). For this column to sort correctly, it must be a number. If necessary, use the function <code>to_number</code> to change the value to a number. |

Chapter 3: Creating and Maintaining Portlet Definitions

Overview of Portlet Definitions

PPM Center portlets include:

- **Builder Portlets.** These are portlets created with the Portlet Definition wizard and Data Source Workbench. Builder portlets consist of a standard portlet definition (XML file) and a portlet data source (SQL query).

HPE supplies several builder portlets as part of PPM Center. You can create your own custom builder portlets using the Portlet Definition wizard and Data Source Workbench.
- **Java Portlets.** These portlets are written in Java and imported into PPM Center using the Portlet Definition wizard. Java portlets consist of a Java portlet definition (XML file) and the Java code.
- **WSRP Portlets.** These portlets are defined by a producer Web service and imported into PPM Center using the Portlet Definition wizard. WSRP portlets have a WSRP portlet definition (XML file) that references the URL of the WSRP portlet. That is, WSRP portlet definitions are a proxy to a remote portlet definition maintained by the producer and accessible through a Web service.

These PPM Center portlets rely on the following types of portlet definitions:

- **HPE-supplied portlet definitions.** These portlet definitions are provided by HPE as part of a PPM Center application.
- **HPE-imported portlet definitions.** These portlet definitions are imported by HPE as part of a PPM Center application.
- **Standard portlet definitions.** These portlet definitions are created using the Portlet Definition wizard (see ["Creating New Portlet Definitions" on page 36](#)).
- **Java portlet definitions.** These portlet definitions are imported using the Import Portlet Definition wizard (see ["Importing Java Portlet Definitions" on page 50](#)), maintained using the Portlet Definition wizard (see ["Creating New Portlet Definitions" on page 36](#)), and include portlet definitions such as RSS Reader and URL.
- **WSRP portlet definitions.** These portlet definitions are imported using the Import Portlet

Definition wizard (see ["Importing WSRP Portlet Definitions" on page 52](#)) and maintained using the Portlet Definition wizard (see ["Creating New Portlet Definitions" on page 36](#)).

HPE-Supplied Portlet Definitions

PPM Center applications, such as Portfolio Management and Demand Management, may include their own portlet definitions.

These HPE-supplied portlet definitions:

- Cannot be deleted
- Cannot have their displays or preferences changed in any way
- Can be modified by:
 - Copying portlet definitions
 - Changing user and administrator access
 - Changing user help (for builder portlets only)

HPE-Imported Portlet Definitions

PPM Center applications may include their own imported Java or WSRP portlet definitions.

These HPE-imported portlet definitions:

- Cannot be deleted
- Can be modified by:
 - Changing user and administrator access
 - Changing general information

Imported Java and WSRP Portlet Definitions

Any Java portlet definitions or WSRP portlet definitions that you have imported using the Import Portlet Definition wizard:

- Can be deleted
- Can be modified by:
 - Configuring user and administrator access
 - Changing general information

Standard Portlet Definitions

Any standard portlet definitions that you have created using the Create Portlet Definition wizard:

- Can be deleted
- Can have *any* of their settings changed

Note: These portlet definitions are sometimes termed "builder portlet definitions" since they are *built* using the Create Portlet Definition wizard.

Searching for Existing Portlet Definitions

To search for an existing portlet definition.

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

The Configure Portlet Definitions page appears.

3. Provide the search criteria using the information from the following table.

| Field Name (*Required) | Description |
|---------------------------|--|
| Name starts with | Specify a string. The search results display all portlets whose name starts with the specified string. Type any alphanumeric string (up to 255 characters in length). |
| Type | Select the type of portlet definition: <ul style="list-style-type: none">◦ List |

| Field Name (*Required) | Description |
|-----------------------------|--|
| | <ul style="list-style-type: none">◦ Pivot Table◦ Bar Chart◦ Clustered Bar Chart◦ Stacked Bar Chart◦ Pie Chart◦ Line Chart◦ XY Chart◦ Radar Chart◦ Bubble Chart◦ Java◦ WSRP |
| Category | Select one or more categories. Choices are limited to the categories available on your PPM Center instance. |
| Enabled | Indicated whether or not the portlet definition is enabled. |
| Created By | Select the user who created the module. |
| Sort By | Select the sort criteria. Choices include: <ul style="list-style-type: none">◦ Name◦ Type◦ Category◦ Enabled |
| Ascending/Descending | Indicate the sorting sequence. |
| *Results Displayed Per Page | Specify the maximum number of search results to display on a page. Type any positive integer. |

Tip: Click **Reset Form** if you would like to clear your current search criteria.

4. Click **Search**.

The Configure Portlet Definitions page is updated to include the search results which are displayed in the **Configure Portlet Definitions** section.

From the Configure Portlet Definitions page you can:

- Select a portlet definition by clicking the link associated with the desired portlet definition (in the **Configure Portlet Definitions** section).
- Refine your search by providing additional search criteria as detailed in [Step 3](#).

Creating New Portlet Definitions

To create an entirely new standard portlet definition, use the Create Portlet Definition wizard.


1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Portlet Definitions > Create Portlet Definition**.


The Choose Portlet Type step of the Create Portlet Definition page appears.


Create Portlet Definition


1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help


Choose Portlet Type


☒ List

Displays data in rows and columns.


☐ Pivot Table

Displays multidimensional aggregations over tabular data


☐ Bar Chart

Displays data in either vertical or horizontal bars.

☐ Clustered Bar Chart

Displays data in either vertical or horizontal bars; bars can be grouped into clusters.

☐ Stacked Bar Chart

Displays data in either vertical or horizontal bars; each bar can be subdivided into categories.

☐ Pie Chart

Typically used to show percentages of a whole.

☐ Line Chart (including subtypes)

Typically used to show changes in data over time. Subtypes include an XY Chart (also known as a Scatter Chart) and a Radar Chart (also known as a Spider Chart which is often used for data that have a natural cycle of change).

☐ Bubble Chart

Typically used to plot points on two axes such as "value" vs. "risk." Bubble size and color indicate additional dimensions of information.

Cancel Back Next

3. Select the type of portlet to create.

| Portlet Type | Description |
|---------------------|--|
| List | Data is presented in tabular form using rows and columns. |
| Pivot Table | Data is aggregated in a table. Rows, columns, tables, and measurements can be grouped into categories. |
| Bar Chart | Data is displayed as vertical or horizontal bars. Each bar represents a single item. |
| Clustered Bar Chart | Data is displayed as vertical or horizontal bars. Bars can be grouped into categories. |
| Stacked Bar Chart | Data is displayed as vertical or horizontal bars. Each bar can be subdivided into categories. |
| Pie Chart | Data is displayed as a percentage of a whole. |

| Portlet Type | Description |
|--------------|---|
| Line Chart | Data is displayed to show changes over time. |
| Bubble Chart | Four dimensions of data are displayed on an x-y axis. The x-y axis location pinpoints a spot while the size and color of the bubble indicates additional dimensions of the information. |

4. Click **Next**.

The Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Portlet Information

*Name:

Category:

Manage Categories

Description:

Default Width:

Narrow ▼

Enabled:

☒ Yes ☐ No

Portlet Information

*Data Source:

New Data Source

Cancel

Back

Next

5. Provide the portlet details using the information from the following table.

| Field Name (*Required) | Description |
|------------------------------------|---|
| Portlet Information section | |
| *Name | Specify a unique name for the portlet. Type any alphanumeric string (up to 80 characters in length). |
| Category | Select one or more categories. Choices are limited to those categories available on your PPM Center instance. |
| Manage Categories | Click to add or delete portlet categories. See " Managing Portlet Categories " on page 81 for details. |
| Description | Specify the portlet definition. Type any alphanumeric string (up to 1,800 characters in length). |

| Field Name (*Required) | Description |
|----------------------------|---|
| | It's helpful to describe the main function of the portlet, such as "Shows projects for a desired program." This description is available when you add a portlet to your Dashboard page. |
| Default Width | Select the default width of the portlet. Choices include: <ul style="list-style-type: none">○ Narrow○ Wide Note that the default width can be changed when the portlet is personalized. |
| Enabled | Indicate whether or not the portlet can be added to the Dashboard page. If a portlet is added to a PPM Dashboard, then disabled, the portlet remains on the Dashboard page. |
| Data Source section | |
| *Data Source | Select the data source for the current portlet. The portlet data source defines the columns or chart entity, and preferences fields for a portlet definition. |
| New Data Source | Click to open the PPM Workbench and create a new portlet data source. |

6. Click **Next**.

The Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

[Add Column](#) [Edit](#) [Delete](#)

Click on a column to select, double-click to edit ☐ User Sortable

Columns Displayed by Default:

| | | | |
|---|--------|---|-------------|
| ▲ | Entity | ▲ | ENTITY_NAME |
| ▼ | | | |

Columns Displayed by Default in Maximized View Only:

| |
|---|
| ▲ |
| ▼ |

Columns Available for Display:

Arrange Data

Default Sort By: Entity ▼ ☒ Ascending ☐ Descending

*Default Rows Displayed: 5 In Normal View
50 In Maximized View

[Cancel](#)

[Back](#)

[Next](#)

7. Provide the appropriate information on the Create Portlet Definition (<Portlet Type>) page.

The information needed to create the different portlet types vary significantly. Field descriptions are provided in the ["Supplemental Details for the Set Up Display Option Step" on page 82](#) section.

- For list portlets, see ["List Portlet" on page 83](#).
- For pivot table portlets, see ["Pivot Table Portlet" on page 90](#).
- For bar charts, see ["Bar Chart Portlet" on page 97](#).
- For clustered bar charts, see ["Clustered Bar Chart Portlet" on page 99](#).
- For stacked bar charts, see ["Stacked Bar Chart Portlet" on page 101](#).
- For pie charts, see ["Pie Chart Portlet" on page 103](#).
- For line charts, see ["Line Chart Portlet" on page 105](#).
- For bubble charts, see ["Bubble Chart Portlet" on page 111](#).

8. Click **Next**.

The Define Preferences step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ **4. Define Preferences**

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Preference Form Layout

Click and drag to select and move fields

Drag outside box to cancel movement

| | | | | | |
|------------------|-----|---|----------|-----|---|
| Status: | ← → | ⋮ | Health: | ← → | ⋮ |
| *Program Name: | ← → | ⋮ | Content: | ← → | ⋮ |
| Project Manager: | ← → | ⋮ | | | |

Edit

☒ Show Preferences summary on this portlet (user can choose to hide it)

☐ Require user to edit preferences before viewing portlet for the first time

Cancel

◀ Back

Next ▶

Preview

Finish

Initially, all preference fields are mapped from the portlet data source, which indicates the name of the field, type of the field (such as auto-complete or text field), and any default value. Note that preferences requiring default values are shown with a red asterisk.

- a. (Optional) To change the width of preferences, click the **Sizing** icon (← →).
- b. (Optional) To rearrange preferences:
 - i. Select a preference.
 - ii. Drag and drop the preference into the desired location.
- c. (Optional) To edit preferences:
 - i. Select a preference.
 - ii. Click **Edit**.

The Edit Portlet Preference: <Preference> dialog box opens.

Edit Portlet Preference: PROP_STATUS***Field Prompt:** **Component Type:** Multi-Select Auto Complete

Display:

☒ Editable - Allow user to edit

☐ Required and Editable - Require user to enter a value

☐ Non-Editable - Only allow user to view

☐ Hidden - Not visible to user

Default Value: 

Done

Cancel

- iii. Provide the preference details using the information from the following table.

| Field Name (*Required) | Description |
|---------------------------|--|
| *Field Prompt | Specify the prompt that will appear on the Portlet Preference page. Type any alphanumeric string (up to 200 characters in length). |
| Display | Select the manner in which this preference is displayed. Choices could include one or more of the following (depending on the component type): <ul style="list-style-type: none"> • Editable. Allows the user to edit the field. • Required and Editable. Requires the user to provide a value. • Non-Editable. Allows user to view, but not edit the field. • Hidden. The information is not viewable (or editable) by the user. This field is required if a default value is required by the portlet data source. |
| Default Value | Specify the default value that is shown when editing the portlet. This field is required if a default value is required by the portlet data source. |

- iv. Click **Done**.

The changes to preference are saved and the Edit Portlet Preference: <Preference> dialog box closes.

- d. (Optional) Select **Show Preferences summary on this portlet (user can choose to hide**

- it) if you want the user to have this capability.
- e. (Optional) Select **Require user to edit preferences before viewing portlet for the first time** if you want to force the user to edit their preferences.
9. If you do not want to change any of the remaining default values, click **Finish**. Otherwise, click **Next**.

The Configure Portlet Communication step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
 5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Portlet Communication Subscribers

Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.

☐ Enable portlet communication (user can choose to disable it)

*Event topic:

- a. (Optional) Select **Enable portlet communication (user can choose to disable it)** if you want the user to have this capability.
 - b. If portlet communication is enabled, you must provide an event topic. Use the auto-complete button to provide an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.
10. If you do not want to change any of the remaining default values, click **Finish**. Otherwise, click **Next**.

The Configure Access step of the Create Portlet Definition (<Portlet Type>) page appears.


Create Portlet Definition (List)

[1. Choose Portlet Type](#) ▶ [2. Enter Portlet Information](#) ▶ [3. Set up Display Options](#) ▶ [4. Define Preferences](#)
[5. Configure Portlet Communication](#) ▶ **6. Configure Access** ▶ [7. Add User Help](#)

Configure Access


User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges: 

Allow access to only the following users and groups:


| Security Type | Name |
|---------------|------|
| All Users | |

Give Access to: 

Administrator Access

Users specified below will have access to modify this Portlet Definition.

| Security Type | Name |
|---------------------------------------|------|
| All Portlet Definition Administrators | |

Give Access to: 

WSRP Access

☐ Make Portlet available to WSRP Consumers

Drilldown Access

☒ This portlet supports drilling into

a. (Optional) In the **User Access** section:

- i. Select one or more access grants (privileges) a user must have in order to add the portlet to a Dashboard page.
- ii. Select one or more users or security groups allowed to add the portlet to a Dashboard page.

By default, access is given to all users belonging to the PPM User security group.

Tip: Whenever there is no specific (individual or group) user access, this setting reverts to its default.

b. (Optional) In the **Administrator Access** section:

- Select one or more users or security groups allowed to modify the portlet.

By default, access is given to all users belonging to the PPM User Admin security group.

Tip: Whenever there is no specific (individual or group) administrator access, this setting reverts to its default.

c. (Optional) In the **WSRP Access** section:

- Select if you want to make the portlet available to WSRP consumers.
- Click **Preview** to review the layout and make sure that you have presented the information as desired.

d. (Optional) In the **Drilldown Access** section:

- Select if you want the portlet to support drill-down access.

11. Click **Next**.

The changes are added to the new portlet definition and the Add User Help step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

– Portlet Help

Help content will be available to end users when viewing this portlet on their dashboard, and when adding portlets during Dashboard Personalization.

Portlet Help Text:



Preview Help

Cancel

◀ Back

Next ▶

Preview

Finish

12. In the **Portlet Help Text** field, type the help text.

This field supports HTML. Use valid HTML tagging when typing the information that defines the functionality of the portlet and lists and describes all of the portlet fields.

Tip: Click **Preview Help** to review the help content make sure that you have presented the

information as desired.

Click **Preview** to review the layout and make sure that you have presented the information as desired.

13. Click **Finish**.

The help data is saved, the portlet definition is created, and a status message displayed.

Create Portlet Definition

Sample has been successfully created.

[Configure Sample](#)

[Create another Portlet Definition](#)

[Search for other Portlet Definitions to configure](#)

14. Review the information to make determine if your portlet definition was successfully created.

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

Copying Portlet Definitions

You can copy a portlet definition to use as the basis for another portlet definition.

Note: Java portlet definitions and WSRP portlet definitions cannot be copied.

To copy a portlet definition:

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

The Configure Portlet Definitions page appears, as shown in Step 2 ("From the menu bar, select **Open > Administration > Portlet Definitions > Configure Portlet Definitions**." on page 34).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see "Searching for Existing Portlet Definitions" on page 34.

The Configure Portlet Definition: *<Portlet Definition>* page appears.

Note: If your PPM Center instance supports multiple languages and the portlet definition is defined in a language other than your session language, you cannot edit the portlet definition. For more information, click **here** in the header or see *Multilingual User Interface Guide*.

4. Click **Copy**.

The Configure Portlet Definition: <Portlet Definition> page is updated with the copied information.

5. Provide the portlet information using the information available from the following steps: Enter Portlet Information (Step 4: ["Click Next." on page 38](#)), Set up Display Options (Step 6: ["Click Next." on page 39](#)), Define Preferences (Step 8: ["Click Next." on page 41](#)), Configure Portlet Communication (Step 9: ["If you do not want to change any of the remaining default values, click Finish. Otherwise, click Next." on page 43](#)), Configure Access (Step 10: ["If you do not want to change any of the remaining default values, click Finish. Otherwise, click Next." on page 43](#)), and Add User Help (Step 11: ["Click Next." on page 45](#)).

Tip: Click **Preview** to review the layout and make sure that you have presented the information as desired.

6. Click **Create**.

7. (Optional) Make any additional modifications and click **Save**.

8. Click **Done** to return to the Configure Portlets Definitions window.

Modifying Portlet Definitions

To change an existing portlet definition:

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

The Configure Portlet Definitions page appears, as shown in Step 2 (["From the menu bar, select Open > Administration > Portlet Definitions > Create Portlet Definition." on page 36](#)).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see ["Searching for Existing Portlet Definitions" on page 34](#).

Note: If your PPM Center instance supports multiple languages and the portlet definition is defined in a language other than your session language, you cannot edit the portlet definition. For more information, click **here** in the header or see *Multilingual User Interface Guide*.

The Configure Portlet Definition: <Portlet Definition> page appears.

Configure Portlet Definition: Time Sheet Totals for Direct Reports

This is a built-in Portlet Definition. It cannot be deleted. Preview Save Done Cancel

Portlet Type: List **Data Source:** [Time Sheet Totals for Direct Reports](#)

Created By: seed data **Last Modified By:** seed data **Last Modification Date:** 8/14/12

Name: Time Sheet Totals for Direct Reports

Category: Time Management

Description: Shows the total time entered by all the direct reports for a specific manager or set of managers

Default Width: Narrow

Enabled: ☒ Yes ☐ No Not in use. Copy

Display Preference Fields Portlet Communication Access User Help

Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

☐ User Sortable

Columns Displayed by Default:

| Name | | Tooltip: RESOURCE_INFO |
|------------------------|--------------------|---------------------------|
| Period Type | RESOURCE_FULL_NAME | Tooltip: PERIOD_TYPE_NAME |
| Current Period (hrs) | PERIOD_TYPE_NAME | |
| Unsubmitted Time (hrs) | ACTUALS_CURRENT | |
| Previous Period (hrs) | UNRELEASED_TIME | |
| | ACTUALS_PREVIOUS | |

Columns Displayed by Default in Maximized View Only:

Columns Available for Display:

Arrange Data

Default Sort By: ☒ Ascending ☐ Descending

***Default Rows Displayed:** 5 In Normal View
50 In Maximized View

Preview Save Done Cancel

4. For non-Java portlets:
 - a. (Optional) At any time, you can click **Save** to commit your changes.
 - b. (Optional) Provide the general information using the details from the **Portlet Information**

section of the table included in ["Creating New Portlet Definitions" on page 36](#).

- c. (Optional) Click the link associated with **Data Source** to view the details of the data source in the PPM Workbench.
- d. (Optional) Click the appropriate tab to make changes to the other settings. The content of the tabs varies based on the portlet type. Field descriptions are provided in ["Creating New Portlet Definitions" on page 36](#).

For Display tab content, refer to the following sections based on the portlet type:

- For list portlets, see ["List Portlet" on page 83](#).
 - For bar charts, see ["Bar Chart Portlet" on page 97](#).
 - For clustered bar charts, see ["Clustered Bar Chart Portlet" on page 99](#).
 - For stacked bar charts, see ["Stacked Bar Chart Portlet" on page 101](#).
 - For pie charts, see ["Pie Chart Portlet" on page 103](#).
 - For line charts, see ["Line Chart Portlet" on page 105](#).
 - For bubble charts, see ["Bubble Chart Portlet" on page 111](#).
5. For Java portlets:
 - a. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in Step 5 (["Provide the portlet details using the information from the following table." on page 38](#)).
 - b. (Optional) Configure portlet communication subscribers using the details provided in Step 9 (["If you do not want to change any of the remaining default values, click Finish. Otherwise, click Next." on page 43](#)).
 - c. (Optional) Configure the user and administrator access using the details provided in Step 10 (["If you do not want to change any of the remaining default values, click Finish. Otherwise, click Next." on page 43](#)).

6. Click **Done**.

Tip: Click **Preview** to review the layout and make sure that you have presented the information as desired.

Deleting Portlet Definitions

To delete a portlet definition:

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

The Configure Portlet Definitions page appears, as shown in Step 2 ("[From the menu bar, select Open > Administration > Portlet Definitions > Configure Portlet Definitions.](#)" on page 34).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see "[Searching for Existing Portlet Definitions](#)" on page 34.

The Configure Portlet Definition: *<Portlet Definition>* page appears.

4. Click the delete icon next to the name of the portlet definition to delete.

A confirmation dialog box opens.

5. Click **Delete**.

The confirmation dialog box closes and the Configure Portlet Definitions page is updated.

Importing Java Portlet Definitions

The WAR files used for Java portlet definitions must be placed on the server file system in the *<PPM_Home>/server/<PPM_Server_Name>/deploy* directory.

To import a Java portlet definition using the Import Portlet Definition wizard:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Portlet Definitions > Import Portlet Definition**.

The Choose Portlet Type step of the Import Portlet Definition page appears.

3. Select **Java Portlet - Created according to the Java Portlet specification**.
4. Click **Next**.

The Select from Available Portlets step of the Import Portlet Definition page appears.

5. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definitions are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.

6. Click **Next**.

The Enter Portlet Information step of the Import Portlet Definition page appears.

7. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in ["Creating New Portlet Definitions" on page 36](#).

8. Click **Next**.

The Configure Portlet Communication step of the Import Portlet Definition page appears.

Import Portlet Definition (Java)

1. Choose Portlet Type ▶ 2. Select from Available Portlets ▶ 3. Enter Portlet Information

4. Configure Portlet Communication ▶ 5. Configure Access

— Portlet Communication Subscribers

Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.

☐ Enable portlet communication (user can choose to disable it)

*Event topic:

If portlet communication is enabled, you must provide an event topic.

Use the auto-complete button to provide an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

9. Click **Next**.

The Configure Access step of the Import Portlet Definition page appears.

Import Portlet Definition (Java)

1. Choose Portlet Type > 2. Select from Available Portlets > 3. Enter Portlet Information
4. Configure Portlet Communication > 5. Configure Access

Configure Access

User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

| Security Type | Name |
|---------------|------|
| All Users | |

Give Access to:

Administrator Access

Users specified below will have access to modify this Portlet Definition.

| Security Type | Name |
|---------------------------------------|------|
| All Portlet Definition Administrators | |

Give Access to:

WSRP Access

☐ Make Portlet available to WSRP Consumers

Cancel Back Next Finish

(Optional) Configure the user and administrator access using the details provided in Step 10 ("If you do not want to change any of the remaining default values, click Finish. Otherwise, click Next." on page 43).

10. Click **Finish**.

The confirmation page appears.

11. Review the Import Portlet Definition page and verify that the import was successful.
12. (Optional) Select the link of your choice.

Importing WSRP Portlet Definitions

To import a WSRP portlet definition using the Import Portlet Definition wizard:

1. Make sure that the producer Web URL is available.
2. Log on to PPM Center.
3. From the menu bar, select **Open > Administration > Portlet Definitions > Import a Portlet Definition**.

The Choose Portlet Type step of the Import Portlet Definition page appears.

4. Select **WSRP Portlet - Created according to WSRP specifications**.
5. Click **Next**.

The Define Producer Web Service step of the Import Portlet definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information

5. Configure Portlet Communication ▶ 6. Configure Access

Define Producer Web Service

In this step you can either: select a predefined producer (new producers can be defined using the Manage WSRP Producer button) or type a free URL of a WSRP producer. When you click Next, the Dashboard will contact the web service to determine what portlets are available. You will then be able to choose one of the portlets that it offers.

☒ Predefined Producer URL

☐ Producer URL

Example: `http://www.myserver.com/dashboard/wsrp4jproducer.wsdl`

6. Select either a **Predefined Producer URL** (define new producers by clicking the **Manage WSRP Producers** button) or **Producer URL** (provide the URL for the Web service providing portlet definitions using WSRP).

Note: If you are importing a portlet from another PPM Center instance, use the following URL: `http://<Host>:<Port>/dashboard/wsrp4jproducer.wsdl`.

7. Click **Next**.

The Web service is contacted to determine what portlet definitions are available.

The Select from Available Portlets page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information

5. Configure Portlet Communication ▶ 6. Configure Access

Select from Available Portlets

The Dashboard has found the portlets listed below from the WSRP producer at `http://16.173.232.74:36000/dashboard/wsrp4jproducer.wsdl`. Please select one of these portlets to import.

| Portlet Display Name | Description |
|---|---|
| <input checked="" type="radio"/> Project List | Displays general information about PPM Projects, such as how close they are to completion and their scheduled finish date. |
| <input type="radio"/> My Tasks | Displays all Project Tasks currently assigned to you that have a scheduled finish date two weeks from the current date. |
| <input type="radio"/> My Requests | Displays all Requests created by or assigned to the current user. This portlet provides a critical view into your most pressing Requests and nearing deadlines. |

8. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definition are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.

9. Click **Next**.

The Enter Portlet Information step of the Import Portlet Definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information

5. Configure Portlet Communication ▶ 6. Configure Access

Portlet Information

Name: Project List

Category: [Manage Categories](#)

Description: Displays general information about PPM Projects, such as how close they are to completion and their schedule

Default Width: Narrow ▼

Enabled: ☒ Yes ☐ No

☐ Enable users to display this portlet without a border

☐ By default, display this portlet without a border

[Cancel](#) [Back](#) [Next](#) [Finish](#)

10. Provide the general information using the details from the **Portlet Information** section of the table included in Step 5 ("Provide the portlet details using the information from the following table." on page 38).

11. Click **Next**.

The Configure Portlet Communication step of the Import Portlet Definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information

5. **Configure Portlet Communication** ▶ 6. Configure Access

Portlet Communication Subscribers

Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.

☐ Enable portlet communication (user can choose to disable it)

Event topic: [Manage event topics](#)

[Cancel](#) [Back](#) [Next](#) [Finish](#)

If portlet communication is enabled, you must provide an event topic.

Use the auto-complete button to provide an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

12. Click **Next**.

The Configure Access step of the Import Portlet Definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information
5. Configure Portlet Communication ▶ 6. Configure Access

Configure Access


User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:


| Security Type | Name |
|---------------|------|
| All Users | |

Give Access to: User 

Administrator Access

Users specified below will have access to modify this Portlet Definition.

| Security Type | Name |
|---------------------------------------|------|
| All Portlet Definition Administrators | |

Give Access to: User 

Drilldown Access

☐ This portlet supports drilling into

Cancel Back Next Finish

13. (Optional) Configure the user and administrator access using the details provided in Step 10 ("If you do not want to change any of the remaining default values, click Finish. Otherwise, click Next." on page 43).

14. Click **Finish**.

The confirmation page appears.

15. Review the Import Portlet Definition page and verify that the import was successful.

16. (Optional) Select the link of your choice.

Migrating Portlet Definitions

Use the PPM Portlet Definition Migrator object type to migrate portlet definitions. The following are things to consider when migrating portlet definitions:

- When migrating an HPE-supplied portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a standard portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.

- When migrating a Java portlet definition, you must configure the source and destination servers with the same set of Web applications (such as WARs) before migrating the Java portlet definition.
- When migrating a WSRP portlet definition, the migration of the portlet definition is sufficient for the WSRP portlet to work. Migrating a WSRP portlet definition might fail under the following conditions:
 - **If the URL uses a port number.** If you move that portlet to a different machine whose WSRP provider runs on a different port number, the portlet stops working.
 - **If a WSRP portlet definition shares a firewall or a private network with a WSRP producer.** You cannot migrate the portlet definition outside of that private network or firewall protected area (because the machine is not accessible).

Defining a Drill-down Page

Portlet drill-down is a powerful feature that allows you to access and view the details of the information displayed in a portlet.

When you create a portlet, you can specify one or more drill-to portlets (these are sometimes called drill-down pages). Clicking a portlet that contains a drill-to portlet results in the display of the corresponding portlet. A drill-to portlet typically offers a view of the data with more details or the information is filtered differently.

- Prior to being added to a portlet, these drill-to portlets must already exist on your PPM Center instance.
- Drill-to portlets must be builder portlets (created using the Portlet Definition wizard).
- Only selected HPE-supplied portlets can be used as drill-to portlets. These include: Issue List, Program Risk List, Program Scope Change List, and Program Contents List.

Usage Example

In some cases you may want to view the data in more than one way. Whenever you want to do this, specify one or more drill-to portlets.

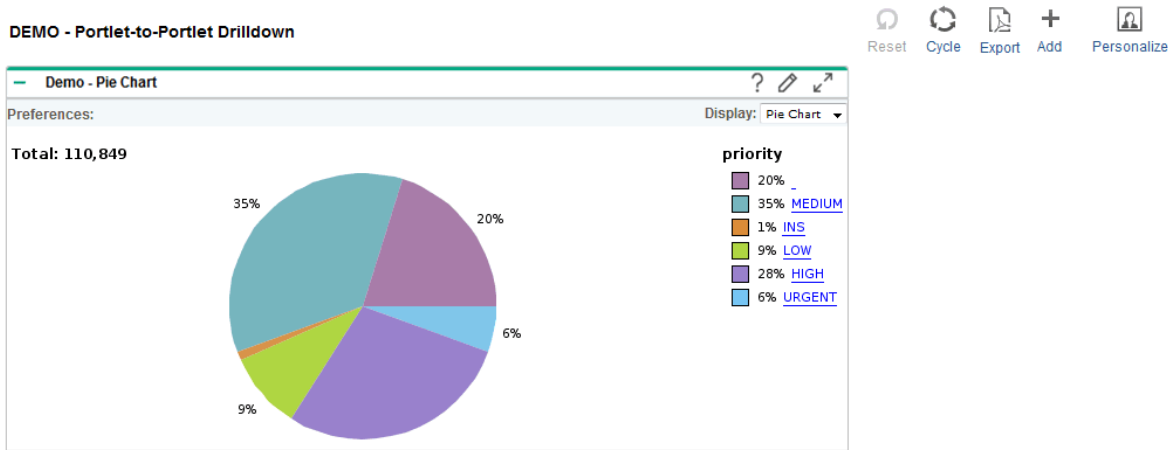
For example, suppose you have a portlet that shows a collection of requests. However, you would like to be able to view the breakdown of requests sorted by priority and have insight into some of the requests' details. To provide this information, you would create two drill-to portlets, one showing the

requests sorted by priority and the other showing the selected details of the requests. Then you would configure your portlet such that it is linked to these drilldown pages (drill-to portlets).

When you click key areas within the portlet having the drilldown pages, the appropriate data from the drill-to portlets is displayed.

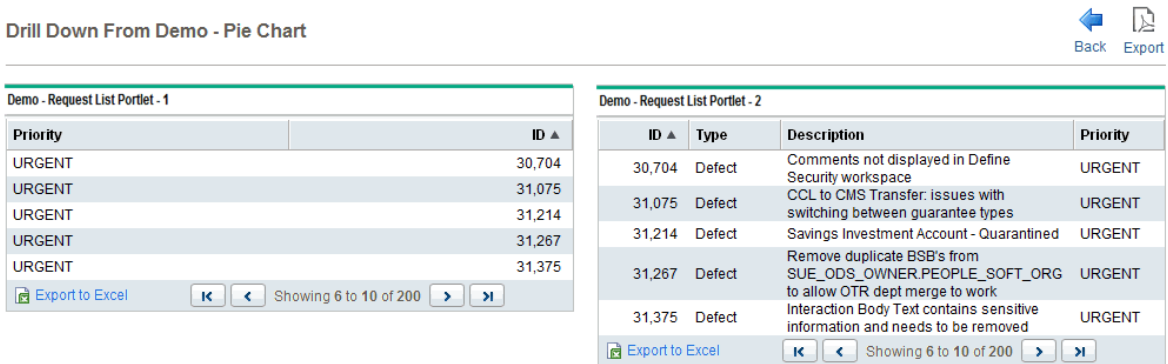
The following figure shows an example of this kind of scenario.

Figure 3-1. Portlet having drilldown pages



If you click either the skyblue (6%) wedge or the **Urgent** link, the drill-to pages having requests with urgent priorities are shown (see "Figure 3-2. Drill-to portlets showing urgent priority requests" below). Note that the drill-to page on the left shows the list of requests having the selected priority, whereas the drill-to page on the right shows the selected details of the request.

Figure 3-2. Drill-to portlets showing urgent priority requests



Alternatively, if you click either the yellowgreen (9%) wedge or the **Low** link, the drill-to pages having requests with low priorities appear (see "Figure 3-3. Drill-to portlets showing low priority requests" on the next page).

Figure 3-3. Drill-to portlets showing low priority requests

Drill Down From Demo - Pie Chart Back Export

| Demo - Request List Portlet - 1 | | Demo - Request List Portlet - 2 | | | |
|---------------------------------|--------|---------------------------------|--------|---|----------|
| Priority | ID ▲ | ID ▲ | Type | Description | Priority |
| LOW | 31,002 | 31,002 | Defect | Transfer client - Include unlinked accounts logic in Move Individual Accounts | LOW |
| LOW | 31,036 | 31,036 | Defect | R17_Technical_ccb_integration_owner.cbi_intraday_load accepts amount=0, and p_cnf_src_code = '' | LOW |
| LOW | 31,074 | 31,074 | Defect | Loan Protection Document | LOW |
| LOW | 31,139 | 31,139 | Defect | Incorrect Message displayed | LOW |
| LOW | 31,230 | 31,230 | Defect | Move account retrieval logic for the Interaction Slidespace from IFX to IFW | LOW |

Export to Excel Showing 61 to 65 of 200

Defining a Drill-down Page

The following procedure describes how to define a drilldown page. These instructions are applicable to the third step of the Portlet Definition wizard.

Tip: The page from which the drill-to portlets are accessed is sometimes referred to as the drill-from page.

To define a drill-down page for a column:

1. On the Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page, select **Drilldown to Portlet**.

Create Portlet Definition (Pie Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

*Wedge Source:

*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

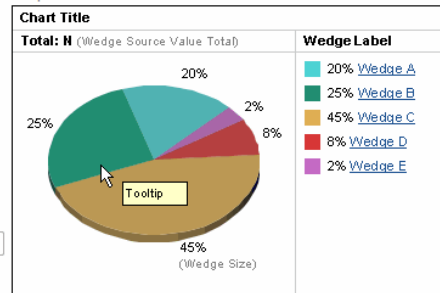
☐ No Hyperlink

☐ Hyperlink Source:

☒ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample Pie Chart



Cancel

Back

Next

2. Click **Edit**.

The Edit Drilldown: <Name> dialog box appears.

Edit Drilldown: Demo - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

Drilldown Page Title:

Drill-to Portlets

Drill-To Preference Values

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

| Map From | Map To |
|----------|--------|
|----------|--------|

3. Click **Add**.

The list of available portlet definitions appears.

4. Select one or more portlet definitions from the list presented.
5. Click **OK**.

The portlet definition are added to the **Drill-to Portlets** list and the list of available portlet definitions disappears.

Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

Drilldown Page Title

Drill-to Portlets

DEMO - Request List Portlet - 1
DEMO - Request List Portlet - 2



Drill-To Preference Values (DEMO - Request List Portlet - 1)

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

| Map From | Map To |
|--|----------------------|
| <input checked="" type="checkbox"/> Source Column: COLUMN_HIDDEN | PTP_RL_PRIORITY |
| <input checked="" type="checkbox"/> Preference: CREATED_BY | CREATED_BY |
| <input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST | REQUEST_TYPE_ID_LIST |

Use the up- and down-pointers to rearrange the order of the drill-to portlets.

When displayed, the drill-to portlets appear in the order your selected, in a top to bottom fashion. Narrow portlets will not be displayed side by side. in pairs with the portlet at the top of the list appearing on the left side of the first row, the next portlet appearing on the right side of that row, the third appearing on the left side of the second row, and so on. If there is only one drill-to portlet or an odd number of drill-to portlets, the single drill-to portlet spans both columns.

6. (Optional) To change the default mapping between the current portlet definition and the drill-to portlet definition:

- a. Select a portlet definition from the **Drill-to Portlets** list.
- b. Click **Add Data Mapping**.

The Add Data Mapping dialog box appears.

- c. Provide the mapping details using the information from the following table.

Tip: The examples shown in "[Usage Samples](#)" on the next page include annotations that identify the data mappings used in the example.

| Field Name (*Required) | Description |
|---------------------------|---|
| *Map Value From | Indicate the data to use. Choices include: <ul style="list-style-type: none">• Data Source Column. Select a column. Choices are limited to the columns available in your data source.• Preference of Drill-From Portlet. Select the desired preference for the portlet.• Text. Provide an alphanumeric string up to 200 characters in length. |
| *Map Value To | Select the desired preference from the drill-to portlet. Choices are limited to the preference fields in the drill-to portlet. |

- d. Click **Add**.

The information is added to the Edit Drilldown: <Name> dialog box and the Add Data Mapping dialog box disappears.

7. (Optional) To delete a mapping between the current portlet definition and the drill-to portlet definition:
- Select a portlet definition from the **Drill-to Portlets** list.
 - In the **Drill-To Preference Values (<Drill-to Portlet>)** section, select from the following techniques:
 - Click the **Delete** icon next to the unwanted mapping
 - Click **Delete All** to remove all the mappings at one time

Note: Occasionally it is easier to delete the existing mappings, then remap the current portlet and drill-to portlet definitions.

8. Once the drilldown is correctly defined, click **Done**.

The Edit Drilldown: <Name> dialog box disappears.

Continue with the configuration (and sharing) of your portlet as you normally would.

Usage Samples

The following images provide details about the data source and portlet configuration used to create the portlets used in the examples shown in this document.

Tip: The annotations identify each of the three data mappings.

DEMO - Pie Chart Portlet

This is the drill-from portlet and its various components.

Create Portlet Definition (Pie Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

*Wedge Source:

*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

☐ No Hyperlink

☐ Hyperlink Source:

☒ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample Pie Chart

Chart Title

Total: N (Wedge Source Value Total)

Wedge Label

20% [Wedge A](#)

25% [Wedge B](#)

45% [Wedge C](#)

8% [Wedge D](#)

2% [Wedge E](#)

45% (Wedge Size)

Tooltip

Data Source

Data Source : DEMO - Pie Chart

Data Source Name: Time-out: 20 Seconds

Reference Code:

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership | 1

Full Query for the Data Source

```
SELECT PRIORITY_MEANING COLUMN_VISIBLE PRIORITY_CODE COLUMN_HIDDEN COUNT(*) VALUE,  
length(priority_code)||length(priority_meaning)||priority_meaning WEDGE_HYPERLINK,  
length(priority_code)||length(priority_meaning)||priority_meaning COLUMN_CODESTRING  
FROM KCRT_REQUESTS_V  
WHERE 1=1  
AND batch_number 1  
GROUP BY PRIORITY_CODE PRIORITY_MEANING
```

Use Bind Variables?

☐ Yes ☒ No

Ready

Data Source : DEMO - Pie Chart

Data Source Name: DEMO - Pie Chart Time-out: Use Default 20 Seconds

Reference Code: DEMO_PIE_CHART

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

| Seq | Name | Token | Validation | Requir... | Enab... |
|-----|-----------------|----------------------|-------------------------------|-----------|---------|
| 1 | Created By: | CREATED_BY | PPM - User Names - Enabled | N | Y |
| 2 | Request Type(s) | REQUEST_TYPE_ID_LIST | CRT - Request Types - Enabled | N | Y |

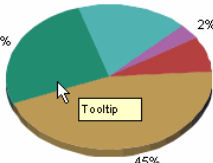
Up Down New Edit Remove

Verify OK Save Cancel

Ready

Portlet Definition

Configure Portlet Definition: Demo - Pie Chart

| Preview Save Done Cancel | | | | | | | | | | | | | | | | |
|--|-----------------------------|---|-------------|--|-------------------------------------|-------------|-----|-----------------------------|-----|-----------------------------|-----|-----------------------------|----|----------------------------|----|----------------------------|
| Portlet Type: Pie Chart Data Source: DEMO - Pie Chart | | | | | | | | | | | | | | | | |
| Created By: User, Admin Last Modified By: User, Admin Last Modification Date: 9/12/12 | | | | | | | | | | | | | | | | |
| *Name: <input type="text" value="Demo - Pie Chart"/> | | | | | | | | | | | | | | | | |
| Category: <input type="text" value="Requests"/> Manage Categories | | | | | | | | | | | | | | | | |
| Description: <input type="text"/> | | | | | | | | | | | | | | | | |
| Default Width: <input type="text" value="Narrow"/> | | | | | | | | | | | | | | | | |
| Enabled: <input checked="" type="radio"/> Yes <input type="radio"/> No In use by 1 user(s), 0 module(s), and 0 hyperlink(s). View Usage Copy Delete | | | | | | | | | | | | | | | | |
| <div style="border: 1px solid #ccc; padding: 5px;"><div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 5px;">DisplayPreference FieldsPortlet CommunicationAccessUser Help</div><div>Data Source Mapping to Chart Select a data source column to map to each chart property: Chart Title: <input type="text"/> *Wedge Source: <input type="text" value="priority"/> *Wedge Size Source: <input type="text" value="request_count"/> Wedge Label: <input type="text" value="priority"/> Color Source: <input type="text"/> Tooltip Source: <input type="text"/> Hyperlink Options: <input type="radio"/> No Hyperlink <input type="radio"/> Hyperlink Source: <input type="text" value="priority"/> <input checked="" type="radio"/> Drilldown to Portlet: Demo - Request List Po... Edit <input type="radio"/> Portlet Event: Edit</div></div> | | <div style="border: 1px solid #ccc; padding: 5px;"><p style="text-align: center; margin-top: 0;">Sample Pie Chart</p><table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th colspan="2">Chart Title</th></tr><tr><th>Total: N (Wedge Source Value Total)</th><th>Wedge Label</th></tr></thead><tbody><tr><td>20%</td><td>20% Wedge A</td></tr><tr><td>25%</td><td>25% Wedge B</td></tr><tr><td>45%</td><td>45% Wedge C</td></tr><tr><td>8%</td><td>8% Wedge D</td></tr><tr><td>2%</td><td>2% Wedge E</td></tr></tbody></table></div> | Chart Title | | Total: N (Wedge Source Value Total) | Wedge Label | 20% | 20% Wedge A | 25% | 25% Wedge B | 45% | 45% Wedge C | 8% | 8% Wedge D | 2% | 2% Wedge E |
| Chart Title | | | | | | | | | | | | | | | | |
| Total: N (Wedge Source Value Total) | Wedge Label | | | | | | | | | | | | | | | |
| 20% | 20% Wedge A | | | | | | | | | | | | | | | |
| 25% | 25% Wedge B | | | | | | | | | | | | | | | |
| 45% | 45% Wedge C | | | | | | | | | | | | | | | |
| 8% | 8% Wedge D | | | | | | | | | | | | | | | |
| 2% | 2% Wedge E | | | | | | | | | | | | | | | |
| Preview Save Done Cancel | | | | | | | | | | | | | | | | |

Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

Drilldown Page Title

Drill-to Portlets

DEMO - Request List Portlet - 1
DEMO - Request List Portlet - 2

**Drill-To Preference Values (DEMO - Request List Portlet - 1)**

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

| Map From | Map To |
|--|----------------------|
| <input checked="" type="checkbox"/> Source Column: COLUMN_HIDDEN | PTP_RL_PRIORITY |
| <input checked="" type="checkbox"/> Preference: CREATED_BY | CREATED_BY |
| <input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST | REQUEST_TYPE_ID_LIST |

Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

Drilldown Page Title

Drill-to Portlets

DEMO - Request List Portlet - 1
 DEMO - Request List Portlet - 2

Add Edit Remove

Drill-To Preference Values (DEMO - Request List Portlet - 2)

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

| Map From | Map To |
|--|----------------------|
| <input checked="" type="checkbox"/> Source Column: CREATED_BY | PTP_RL_PRIORITY |
| <input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST | REQUEST_TYPE_ID_LIST |
| <input checked="" type="checkbox"/> Preference: CREATED_BY | CREATED_BY |

Add Data Mapping Delete All

Done Cancel

DEMO - Request List Portlet - 1

This is one of the drill-to portlets and its various components.

Demo - Request List Portlet - 1

Preferences:

Priority:

| Priority | ID ▲ |
|----------|--------|
| HIGH | 30,003 |
| URGENT | 30,004 |
| MEDIUM | 30,284 |
| MEDIUM | 30,285 |
| LOW | 30,286 |

Export to Excel
 Showing 1 to 5 of 200

Data Source

Data Source : DEMO - Request List Portlet - 1

Data Source Name: DEMO - Request List Portlet - 1 **Time-out:** Use Default 20 Seconds

Reference Code: DEMO__REQUEST_LIST_PORTLET__1

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

Full Query for the Data Source

```
SELECT PRIORITY_MEANING MY_PRIORITY, request_id MY_REQUEST_NO
FROM KCRT_REQUESTS_V
WHERE 1=1
AND batch_number = 1
GROUP BY PRIORITY_CODE PRIORITY_MEANING
```

Edit Query **Use Bind Variables?** ☐ Yes ☒ No

Verify **OK** **Save** **Cancel**

Ready

Data Source : DEMO - Request List Portlet - 1

Data Source Name: DEMO - Request List Portlet - 1 Time-out: Use Default 20 Seconds

Reference Code: DEMO_REQUEST_LIST_PORTLET_1

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

| Seq | Name | Token | Validation | Requir... | Enab... |
|-----|-----------------|----------------------|--|-----------|---------|
| 1 | Created By: | CREATED_BY | PM - User Names - Enabled | N | Y |
| 2 | Request Type(s) | REQUEST_TYPE_ID_LIST | RT - Request Types - Enabled | N | Y |
| 3 | Priority | PTP_RL_PRIORITY | DEM Filter - Priority - Enabled (with blank) | N | Y |

1 2 3

Up Down New Edit Remove

Verify OK Save Cancel

Ready

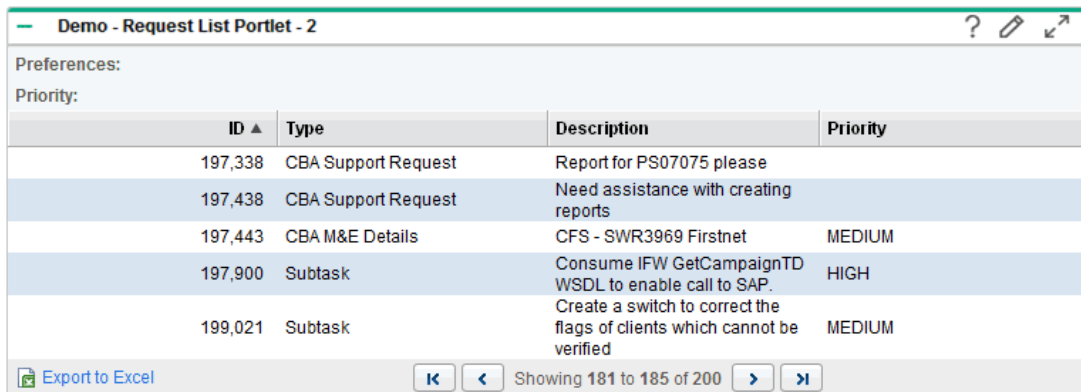
Portlet Definition

Configure Portlet Definition: Demo - Request List Portlet - 1

| | | | | | | | | | | | |
|--|---|----------|------------|----------|----------|--|---|---|----|------------|--|
| Preview Save Done Cancel | | | | | | | | | | | |
| Portlet Type: | List Data Source: DEMO - Request List Portlet - 1 | | | | | | | | | | |
| Created By: | User, Admin Last Modified By: User, Admin Last Modification Date: 9/12/12 | | | | | | | | | | |
| *Name: | <input type="text" value="Demo - Request List Portlet - 1"/> | | | | | | | | | | |
| Category: | <input type="text"/> Manage Categories | | | | | | | | | | |
| Description: | <input type="text"/> | | | | | | | | | | |
| Default Width: | Narrow ▼ | | | | | | | | | | |
| Enabled: | <input checked="" type="radio"/> Yes <input type="radio"/> No In use by 0 user(s), 0 module(s), and 2 hyperlink(s). View Usage Copy Delete | | | | | | | | | | |
| <div style="border: 1px solid #ccc; padding: 5px;"><div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 5px;">DisplayPreference FieldsPortlet CommunicationAccessUser Help</div><div style="padding: 5px 0;">Display Columns</div><div style="padding: 5px 0;"><small>Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.</small></div><div style="display: flex; margin-bottom: 5px;">Add ColumnEditDelete</div><div style="padding: 5px 0;"><small>Click on a column to select, double-click to edit</small> <input type="checkbox"/> User Sortable</div><div style="border-top: 1px solid #ccc; padding: 5px 0;">Columns Displayed by Default:</div><table style="width: 100%; border-collapse: collapse;"><tr><td style="width: 20px; text-align: center;">▲</td><td style="width: 20px; text-align: center;">▼</td><td style="border: 1px solid #ccc; padding: 2px;">Priority</td><td style="border: 1px solid #ccc; padding: 2px;">Priority</td><td style="background-color: #ffffcc; width: 400px;"></td></tr><tr><td style="text-align: center;">▼</td><td style="text-align: center;">▲</td><td style="border: 1px solid #ccc; padding: 2px;">ID</td><td style="border: 1px solid #ccc; padding: 2px;">REQUEST_ID</td><td style="background-color: #ffffcc;"></td></tr></table><div style="border-top: 1px solid #ccc; padding: 5px 0;">Columns Displayed by Default in Maximized View Only:</div><div style="padding: 5px 0;"><div style="text-align: center;">▲</div><div style="text-align: center;">▼</div></div><div style="border-top: 1px solid #ccc; padding: 5px 0;">Columns Available for Display:</div><div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"><div style="background-color: #f9f9f9; padding: 5px;">Arrange Data</div><div style="padding: 5px;">Default Sort By: ID ▼ <input checked="" type="radio"/> Ascending <input type="radio"/> Descending</div><div style="padding: 5px;">*Default Rows Displayed: 5 In Normal View 50 In Maximized View</div></div></div> | | ▲ | ▼ | Priority | Priority | | ▼ | ▲ | ID | REQUEST_ID | |
| ▲ | ▼ | Priority | Priority | | | | | | | | |
| ▼ | ▲ | ID | REQUEST_ID | | | | | | | | |
| Preview Save Done Cancel | | | | | | | | | | | |

DEMO - Request List Portlet - 2

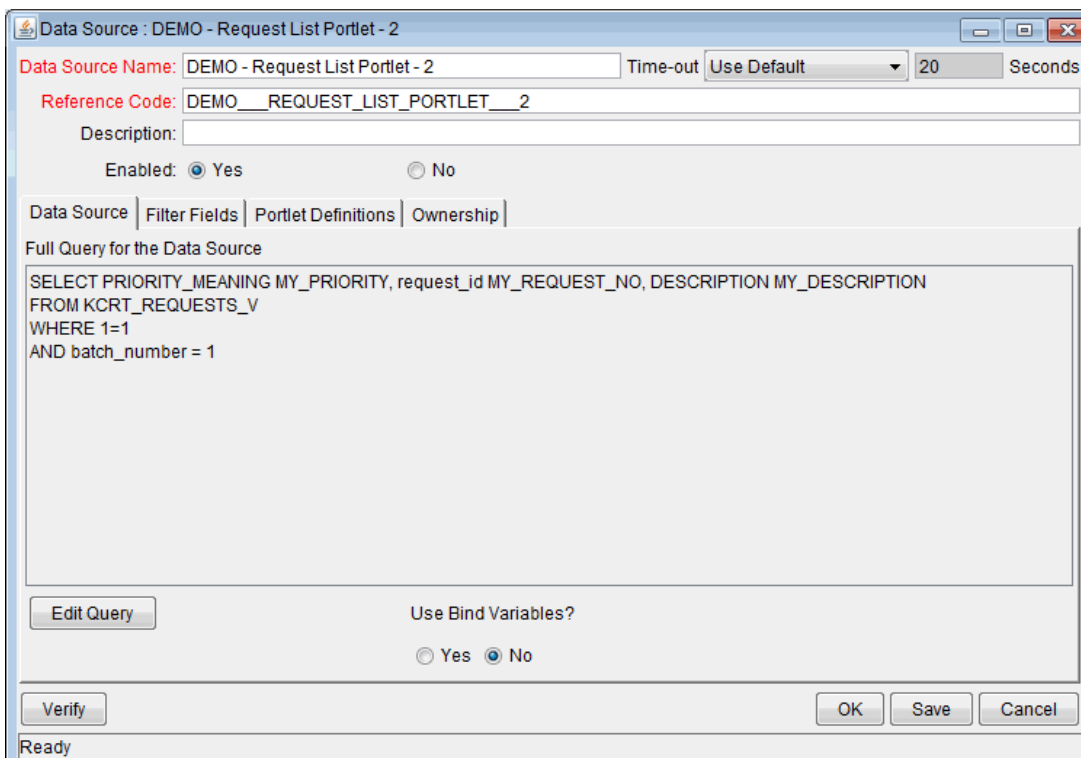
This is the other drill-to portlet and its various components.



The screenshot shows a web application window titled "Demo - Request List Portlet - 2". It features a "Preferences:" section with a "Priority:" label. Below this is a table with four columns: "ID", "Type", "Description", and "Priority". The table contains five rows of data. At the bottom of the window, there is an "Export to Excel" button, navigation arrows, and a status bar indicating "Showing 181 to 185 of 200".

| ID | Type | Description | Priority |
|---------|---------------------|--|----------|
| 197,338 | CBA Support Request | Report for PS07075 please | |
| 197,438 | CBA Support Request | Need assistance with creating reports | |
| 197,443 | CBA M&E Details | CFS - SWR3969 Firstnet | MEDIUM |
| 197,900 | Subtask | Consume IFW GetCampaignTD WSDL to enable call to SAP. | HIGH |
| 199,021 | Subtask | Create a switch to correct the flags of clients which cannot be verified | MEDIUM |

Data Source



The screenshot shows a configuration window titled "Data Source : DEMO - Request List Portlet - 2". It contains several fields and controls:

- Data Source Name:** DEMO - Request List Portlet - 2
- Time-out:** Use Default (dropdown), 20 (text input), Seconds
- Reference Code:** DEMO__REQUEST_LIST_PORTLET__2
- Description:** (empty text input)
- Enabled:** ☒ Yes, ☐ No
- Tabs:** Data Source (selected), Filter Fields, Portlet Definitions, Ownership
- Full Query for the Data Source:**

```
SELECT PRIORITY_MEANING MY_PRIORITY, request_id MY_REQUEST_NO, DESCRIPTION MY_DESCRIPTION
FROM KCRT_REQUESTS_V
WHERE 1=1
AND batch_number = 1
```
- Buttons:** Edit Query, Use Bind Variables? (Yes/No radio buttons), Verify, OK, Save, Cancel
- Status:** Ready

Data Source : DEMO - Request List Portlet - 2

Data Source Name: DEMO - Request List Portlet - 2 Time-out: Use Default 20 Seconds

Reference Code: DEMO__REQUEST_LIST_PORTLET__2

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

| Seq | Name | Token | Validation | Required | Enabled |
|-----|-----------------|----------------------|--|----------|---------|
| 1 | Created By | CREATED_BY | PRM - User Names - Enabled | N | Y |
| 2 | Request Type(s) | REQUEST_TYPE_ID_LIST | GMT - Request Types - Enabled | N | Y |
| 3 | Priority | PTP_RL_PRIORITY | DEM Filter - Priority - Enabled (with blank) | N | Y |

Ready

Verify OK Save Cancel

New Edit Remove

Portlet Definition

Configure Portlet Definition: Demo - Request List Portlet - 2

Preview Save Done Cancel

Portlet Type: List Data Source: DEMO - Request List Portlet - 2

Created By: User, Admin Last Modified By: User, Admin Last Modification Date: 9/12/12

*Name: Demo - Request List Portlet - 2

Category: Manage Categories

Description:

Default Width: Narrow

Enabled: ☒ Yes ☐ No In use by 1 user(s), 0 module(s), and 2 hyperlink(s). View Usage Copy Delete

Display Preference Fields Portlet Communication Access User Help

Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

Add Column Edit Delete

Click on a column to select, double-click to edit User Sortable

Columns Displayed by Default:

| | |
|-------------|-------------|
| ID | REQUEST_ID |
| Type | Type |
| Description | DESCRIPTION |
| Priority | Priority |

Columns Displayed by Default in Maximized View Only:

Columns Available for Display:

Arrange Data

Default Sort By: ID ☒ Ascending ☐ Descending

*Default Rows Displayed: 5 In Normal View 50 In Maximized View

Preview Save Done Cancel

Defining a Portlet Event

The following procedure describes how to define a portlet event. These instructions are applicable to the third step (Set up Display Options) of the Portlet Definition wizard.

Portlet events are used to build communication between two portlets, which is a way to implement the portlet drill-down feature. A portlet event should be defined in the drill-from portlet.

To define a portlet event in the drill-from portlet:

1. On the Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page, from the Hyperlink Options section, select **Portlet Event**.


Note: For list portlets, click **Add Column** to open the Add Display Column dialog box, and then click **Portlet Event**.

2. Click **Edit**.

The Edit Portlet Event Properties dialog box appears.

Edit Portlet Event Properties

You can edit portlet event data that will be published for the chosen event topic by this hyperlink. Each event data has key-value property set.

*Event topic:  [Manage event topics](#)

Event Properties

To create additional event property click Add Event Property. In the Add Event Property window for property key enter the text or use preference of selected portlet definition. Use the data source column or preference of source portlet or enter text to define the property value.

| Property Key | Property Value |
|---|----------------|
| Add Event Property Delete All | |

[Done](#)
[Cancel](#)

3. Provide an event topic in either of the following two ways:
 - Use the auto-complete button to provide an existing event topic
 - Add a new topic.

To add a new topic:

- i. Click **Manage event topics**.

The Manage portlet event topics dialog box opens.

- ii. In the **New Topic** field, enter the event topic name.

- iii. Click **Add**.

The event topic you added is listed under the Portlet Event Topics.

- iv. Click **Done**.

You are back to the Edit Portlet Event Properties dialog box.

- v. Use the auto-complete button to select the event topic you added.

4. Click **Add Event Property**.

The Add Event Property dialog box appears.

Add Event Property

| | | |
|-------------------------|--|--------------------------|
| *Property Key: | <input checked="" type="radio"/> Preference: | Portlet Definition: |
| | | TEST_PORTLET_EVEN |
| | | Preference: |
| | | REQUEST_TYPE_NAMES |
| | <input type="radio"/> Text: | |
| *Property Value: | <input checked="" type="radio"/> Data Source Column: | DESCRIPTION |
| | <input type="radio"/> Text: | |
| | | Add Cancel |

5. Provide the event property details using the information from the following table.

| Field Name (*Required) | Description |
|---------------------------|---|
| *Property Key | <ul style="list-style-type: none">◦ Preference<ul style="list-style-type: none">• Portlet Definition: Select the drill-to portlet you want to build communication with the drill-from portlet. Choices are limited to the portlets that have preference fields in their portlet definitions.• Preference: Select the desired preference of the portlet definition you decided in the Portlet Definition field.◦ Text: Provide an alphanumeric string up to 200 characters in length. |
| *Property Value | <p>Indicate the data to use.</p> <p>Choices include:</p> <ul style="list-style-type: none">◦ Data Source Column. Select a column. Choices are limited to the columns available in the data source of the drill-from portlet.◦ Text. Provide an alphanumeric string up to 200 characters in length. |

6. Click **Add**.

The information is added to the Edit Portlet Event Properties dialog box and the Add Event Property dialog box disappears.

7. (Optional) To delete an event property:

- Click the **Delete** icon next to the unwanted event property.
 - Click **Delete All** to remove all the event properties at one time.
8. Once the event properties are correctly defined, click **Done**.

The Edit Portlet Event Properties dialog box disappears.

After defining a portlet event in the drill-from portlet, you should enable portlet communication in the drill-to portlet before the portlet communication is built. To do so:

1. From the menu, select **Search > Administrative > Portlet Definitions**.
2. Click **Search**.
3. Select the drill-to portlet.

The Configure Portlet Definition page opens.

4. In the Portlet Communication tab, click the **Enable portlet communication (user can choose to disable it)** option.
5. In the **Event topic** field, use the auto-complete button to select the event topic you added in the drill-from portlet.
6. Click **Done**.
7. Go to the Edit Preferences page of the drill-to portlet.

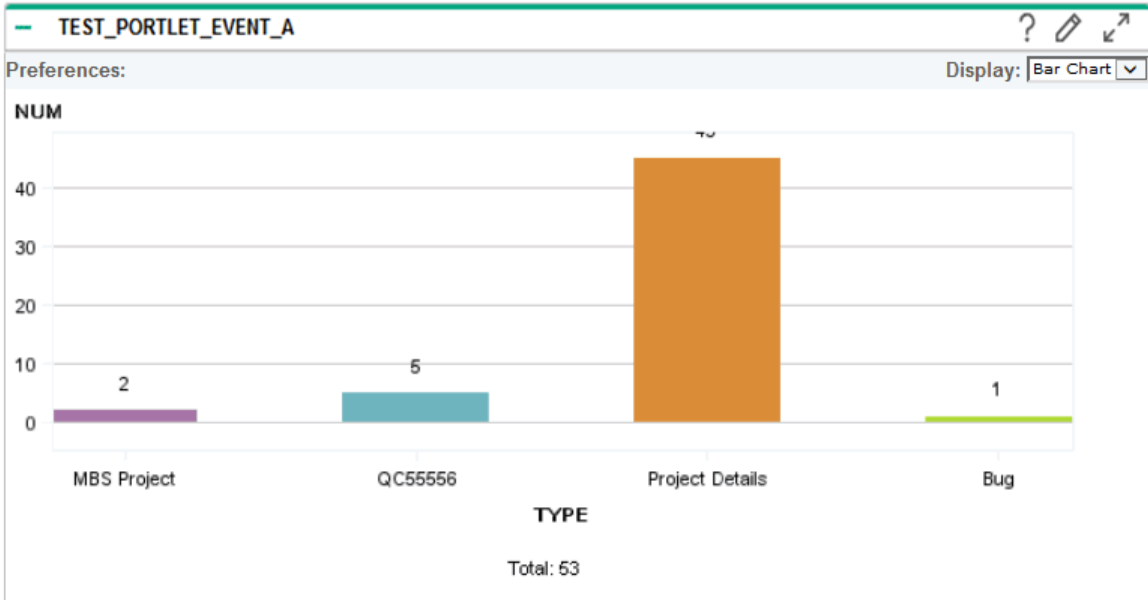
For instructions about how to go to the Edit Preferences page, see the *Getting Started* guide.

8. Click **Enable portlet communication**.
9. Click **Done**.

Usage Sample

The following images provide details about the data source and portlet configuration used to build portlet communication between two portlets using portlet events.

The following image shows an example of a drill-from portlet.



If you click any of the four request types, the drill-to portlet display requests of that request type. For example, if you click MBS Project, the drill-to portlet displays requests of the request type MBS Project.

A table titled "TEST_PORTLET_EVENT_B" displays request details. The table has three columns: Request Number, Description, and Priority code. The first two rows are visible, with the second row highlighted. Below the table, there is an "Export to Excel" button and navigation controls showing "Showing 1 to 2 of 2".

| Request Number ▲ | Description | Priority code |
|------------------|-------------|---------------|
| 30640 | test1 | |
| 30641 | test | |

Export to Excel

Showing 1 to 2 of 2

TEST_PORTLET_EVENT_A

This is the data source of the drill-from portlet TEST_PORTLET_EVENT_A.

Data Source : TEST_PORTLET_EVENT_A

Data Source Name: TEST_PORTLET_EVENT_A Time-out: Use Default 20 Seconds

Reference Code: TEST_PORTLET_EVENT_A

Description:

Enabled: ☒ Yes ☐ No

Data Source Filter Fields Portlet Definitions Ownership

Full Query for the Data Source

```
SELECT count(1) NUM, t2.REQUEST_TYPE_NAME TYPE
FROM kcr_requests t1, kcr_request_types_nls t2
WHERE t1.request_type_id = t2.request_type_id
group by t2.request_type_name
```

Edit Query Use Bind Variables? ☐ Yes ☒ No

Verify OK Save Cancel

Ready

This is event property details of the event topic defined in the portlet TEST_PORTLET_EVENT_A.

Add Event Property

*Property Key: ☒ Preference: Portlet Definition: PORTLET_EVENT_B

Preference: REQUEST_TYPE_NAMES

☐ Text:

*Property Value: ☒ Data Source Column: TYPE

☐ Text:

Add Cancel

TEST_PORTLET_EVENT_B

This is the data source of the drill-to portlet TEST_PORTLET_EVENT_B.

Data Source : TEST_PORTLET_EVENT_B

Data Source Name: TEST_PORTLET_EVENT_B Time-out: Use Default 20 Seconds

Reference Code: TEST_PORTLET_EVENT_B

Description:

Enabled: ☒ Yes ☐ No

Data Source Filter Fields Portlet Definitions Ownership

Full Query for the Data Source

```
SELECT t2.REQUEST_TYPE_NAME TYPE, t1.REQUEST_NUMBER REQUEST_NUMBER, t1.DESCRPTION DESCRIPTION,
t1.PRIORITY_CODE PRIORITY_CODE
FROM kcr_requests t1, kcr_request_types_nls t2
WHERE t1.request_type_id = t2.request_type_id
```

Edit Query Use Bind Variables?

☐ Yes ☒ No

Verify OK Save Cancel

Ready

Data Source : TEST_PORTLET_EVENT_B

Data Source Name: TEST_PORTLET_EVENT_B Time-out: Use Default 20 Seconds

Reference Code: TEST_PORTLET_EVENT_B

Description:

Enabled: ☒ Yes ☐ No

Data Source Filter Fields Portlet Definitions Ownership

| Seq | Name | Token | Validation | Required | Enabled |
|-----|--------------|--------------------|------------------|----------|---------|
| 1 | request_type | REQUEST_TYPE_NAMES | Text Field - 200 | N | Y |

↑ ↓ New Edit Remove

Verify OK Save Cancel

Ready

Managing Portlet Categories

Managing categories is an optional step when creating or maintaining portlet definitions.

Portlet categories define an entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet can make a portlet easier to find.

Adding Portlet Categories

To add a portlet category:

1. Click **Manage Categories**, on either of the following pages:
 - Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page
 - Configure Portlet Definition: <Portlet Definition> page

The Manage Categories dialog box appears.

Manage Categories

| Category |
|--------------------------|
| ** Financial Management |
| ** Operational Reporting |
| ** Packages |
| ** Portfolio Management |
| ** Program Management |
| ** Project Management |
| ** Project Overview |
| ** Requests |
| ** Resource Management |
| ** Time Management |

** Built-in categories cannot be deleted.

New Category:

2. Type a new category name in the **New Category** field.
3. Click **Add**.

The new category is added to the list.

4. Click **Done**.

The Manage Categories dialog box is closed.

Deleting Portlet Categories

To delete a portlet category:

Note: HPE-supplied portlet categories cannot be deleted. Also, you cannot delete a portlet category containing one or more portlet definition, and any such categories do not include a **Delete** icon.

1. Click **Manage Categories**, on either the:
 - Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page
 - Configure Portlet Definition: <Portlet Definition> page

The Manage Categories dialog box appears.

2. Click the **Delete** icon next to the portlet category.

The portlet category is deleted.

3. Click **Done**.

The Manage Categories dialog box is closed.

Supplemental Details for the Set Up Display Option Step

This section provides relevant details for the Set up Display options for the various portlet types. This information is used in Step 7 ("[Provide the appropriate information on the Create Portlet Definition \(<Portlet Type>\) page.](#)" on page 40).

List Portlet

Figure 3-4. Set up Display Options for list portlets

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

– Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

Add Column **Edit** **Delete**

Click on a column to select, double-click to edit ☐ User Sortable

Columns Displayed by Default:

▲ ▼ Entity ▲ ENTITY_NAME

Columns Displayed by Default in Maximized View Only:

▲ ▼

Columns Available for Display:

– Arrange Data

Default Sort By: Entity ▼ ☒ Ascending ☐ Descending

*Default Rows Displayed: 5 In Normal View
50 In Maximized View

Cancel **◀ Back** **Next ▶**

Table 3-1. Set up Display Options field descriptions for list portlets

| Field Name (*Required) | Description |
|-------------------------|---|
| Display Columns section | |
| Add Column | Click to add a new column. See "Adding Columns" on the next page for details. |
| Edit | Select a column, then click to make changes to that column. See "Editing Columns" on page 89 for details. |
| Delete | Select a column, then click to remove that column. See "Deleting Columns" on page 89 for details. |

Table 3-1. Set up Display Options field descriptions for list portlets, continued

| Field Name (*Required) | Description |
|---|--|
| Columns Displayed by Default | <p>Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it.</p> <p>Choices include the columns whose Display value is set to either By Default - Shown in user's initial view or Always - Cannot be removed by user.</p> |
| Columns Displayed by Default in Maximized View Only | <p>Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it.</p> <p>Choices include the columns whose Display value is set to In Maximized View Only - Shown by default in Maximized View.</p> |
| Columns Available for Display | <p>Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it.</p> <p>Choices include the columns whose Display value is set to Optional - Available for display by user.</p> |
| Arrange Data section | |
| Default Sort By | <p>Select the default column used to sort the data.</p> <p>Choices include the columns whose User Sortable value is set to Yes.</p> |
| Ascending/Descending | Indicate whether to sort the data in Ascending and Descending order. |
| *Default Rows Displayed in Normal View | <p>Specify the default number of records displayed in a normal view portlet.</p> <p>Type any integer greater than zero.</p> |
| *Default Rows Displayed in Maximized View | <p>Specify the default number of records displayed in a maximized portlet.</p> <p>Type any integer greater than zero.</p> |

Adding Columns

To add a new column to a list portlet:

1. Click **Add Column**.

The Add Display Column dialog box opens.

Add Display Column

***Column Title:**

***Column Type:** Text

***Column Value:** ☒ Visible Text Source: EFFORT_HOVER ☐ Calculated: no value

☐ Source contains HTML

Column Width: Small

Truncate after: Characters ☐ Show Full Text in Tooltip

Tooltip Value: ☒ Tooltip Source: ☐ Calculated: no value

☐ Source contains HTML

User Sortable: ☒ Yes ☐ No

Display: ☐ Optional - Available for display by user ☒ By Default - Shown in user's initial view ☐ In Maximized View Only - Shown by default in Maximized View ☐ Always - Cannot be removed by user

Hyperlink Options: ☒ No Hyperlink ☐ Hyperlink Source: EFFORT_HOVER ☐ Drilldown to Portlet: (None) ☐ Portlet Event:

2. Provide the column details using the information from the following table.

Note: Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of the following table.

| Field Name (*Required) | Description |
|---------------------------|--|
| All Column Types | |
| *Column Title | Specify the column title to be displayed in the portlet. Type any alphanumeric string (up to 200 characters in length). |

| Field Name (*Required) | Description |
|---------------------------|---|
| | <p>Note: While the column title may be up to 200 characters in length, the PPM Dashboard, by default, displays only the first 20 characters. To increase (or decrease) the number of characters displayed by the PPM Dashboard, set the <code>dashboard.List-Column-Header-Size</code> parameter in the <code>server.conf</code> file. See the <i>Installation and Administration Guide</i> for more information about setting <code>server.conf</code> parameters.</p> |
| *Column Type | <p>Select the column type.</p> <p>Choices include:</p> <ul style="list-style-type: none"> Text Text with Icon Icon Progress Bar |
| Tooltip Value | <p>Specify the content that appears when a user's cursor hovers over an item. If the content contains HTML, select the Source contains HTML checkbox.</p> <ul style="list-style-type: none"> Tooltip Source. Select the data column that contains the information to display in the tooltip. Choices are limited to those columns in the data source that are configured for this portlet definition on your PPM Center instance. Calculated. Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL). Source contains HTML. Select to enable HTML support for Tooltip Value. |
| User Sortable | <p>Indicate whether or not the current column can be used for sorting purposes.</p> |
| Display | <p>Select how the column should be displayed.</p> <p>Choices include:</p> <ul style="list-style-type: none"> Optional. Make the column available to the user in the portlet's edit page (Available Column). By Default. Make the column visible in the portlet (Displayed Column). In Maximized View Only. Make the column visible in the portlet's Maximized View only (Additional Columns Displayed in Maximized View). |

| Field Name (*Required) | Description |
|--------------------------------------|--|
| | View). <ul style="list-style-type: none"> ◦ Always. Make the column visible in the portlet (Displayed Column with asterisk). |
| Hyperlink Options | Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> ◦ No Hyperlink. Links to other pages are not allowed. ◦ Hyperlink Source. Link to the selected column. ◦ Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. ◦ Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |
| Column Type: Text and Text with Icon | |
| *Column Value | Specify the content to display in the portlet. If the content contains HTML, select the Source contains HTML checkbox. <ul style="list-style-type: none"> ◦ Visible Text Source. The content displayed is the value from the data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance. ◦ Calculated. Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL). ◦ Source contains HTML. Select to enable HTML support for Column Value. |
| Column Width | Select the width of the column relative to the other columns. Choices include: <ul style="list-style-type: none"> ◦ Small ◦ Medium ◦ Large |
| Truncate after <X> Characters | When the Source contains HTML checkbox for Column Value is selected, specify the number of characters to show in the column. Type any integer greater than zero. |
| Show Full Text in | When a value is supplied for Truncate after <X> Characters , select to |

| Field Name (*Required) | Description |
|-------------------------------------|--|
| Tooltip | show the full text in the tooltip. |
| Column Type: Icon or Text with Icon | |
| *Column Value | <p>Select the icon to display in the portlet.</p> <ul style="list-style-type: none"> ◦ Icon Source. The icon displayed is the value from the data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance or a column predefined with icon URLs. ◦ Calculated. Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL). |
| Column Type: Progress Bar | |
| *Column Value | <p>Select the percentage data to display in the portlet.</p> <ul style="list-style-type: none"> ◦ Percentage Source. The percentage displayed is the value from the data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance or a column predefined with percentage information. ◦ Calculated. Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL). |
| Color Value | <p>Select a color map to use.</p> <ul style="list-style-type: none"> ◦ Color Source. Select the color map's data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance. ◦ Calculated. Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL). <p>See "Selecting Portlet Colors" on page 113 for details.</p> |

The following are examples of **Calculated** values.

If you want the content to display a percentage as a whole number but the data column returns a decimal number, specify the following in the dialog to calculate the percentage:

```
var return_value=<DATA_COLUMN>*100;
```

To calculate a project's status based on the number of unassigned tasks, specify the following in the dialog to calculate status values. This example is for Column Type **Icon** or **Text with Icon** and

sets the icon status to green if there are no unassigned tasks, yellow if there are less than five unassigned tasks, and red if there are five or more unassigned tasks.

```
var numTasks = "<DATA_COLUMN_UnassignedTasks>";
var image;

if (numTasks == 0)
    image = "images/green.gif";
else if (numTasks < 5)
    image = "images/yellow.gif";
else
    image = "images/red.gif";

return_value=image;
```

3. Click **Done**.

The Add Display Column dialog box closes and the new column is added to the Create Portlet Definition (List) page.

Editing Columns

To modify an existing column in a list portlet:

1. Select the column to be modified and click Edit (or double-click the column).

The Edit Display Column: *<Column Title>* dialog box opens.

2. Make the desired changes using the information from the table in ["Provide the column details using the information from the following table." on page 85](#) as a guideline.

Note: Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of that table.

3. Click **Done**.

The Edit Display Column: *<Column Title>* dialog box closes and any applicable changes are noted on the Create Portlet Definition (List) page.

Deleting Columns

To delete an existing column from a list portlet:

1. Select the column to be removed.
2. Click **Delete**.

The column is deleted from the Create Portlet Definition (List) page.

Pivot Table Portlet

Figure 3-5. Set up Display Options for pivot table portlets

Create Portlet Definition (Pivot Table)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Dimension

Data columns may be displayed in the pivot row, column dimensions or used as paging filters.

[Add Column](#) [Add Measurement](#) [Edit](#) [Delete](#)

Click on a column to select, double-click to edit

Data columns displayed in the pivot Row Dimension

[▲](#)
[▼](#)

Data columns displayed in the pivot Column Dimension

[▲](#)
[▼](#)

Data columns used as pivot paging filters

[▲](#)
[▼](#)

Data columns used as pivot measurements

[▲](#)
[▼](#)

Display Options

☒ Enable aggregation configuration Aggregation function: ▼

☐ Display empty cells Totals aggregation function: ▼

☐ Display row/column totals

☐ Display subtotals

Hyperlink Options: ☐ No Hyperlink
☐ Drilldown to Portlet: (None) [Edit](#)
☒ Portlet Event: [Edit](#)

[Cancel](#) [Back](#) [Next](#)

Table 3-2. Set up Display Options field descriptions for pivot table portlets

| Field Name (*Required) | Description |
|--|---|
| Dimension section | |
| Add Column | Click to add a new data column. See "Adding a Pivot Table Row, Column, or Paging Filter Data Column" on the next page for details. |
| Add Measurement | Click to add a new measurement data column. See "Adding a Pivot Table Measurement Data Column" on page 93 for details. |
| Edit | Select a data column, then click to make changes to that data column. You can also double-click on a specific data column to edit that data column. |
| Delete | Select a data column, then click to remove that column. |
| Data columns displayed in the pivot row dimension | Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This data is displayed one row per category. |
| Data columns displayed in the pivot column dimension | Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This data is displayed one column per category. |
| Data columns used as pivot paging filters | Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This data is displayed one table per category. |
| Data columns used as pivot measurements | Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This is the data that is summarized in the table. |
| Display Options section | |
| Enable aggregation configuration | By default, aggregation is enabled. Aggregation configuration is the calculation of values based on the selected Totals aggregation function . Disable aggregation if the data source aggregates the data. |
| Aggregation function | Select a function to determine how to calculate a value if the data source contains more than one value for a distinct data column. |
| Display empty cells | If the data source does not contain any data, the row or column is not displayed. Select this checkbox to display empty cells. |
| Totals aggregation function | Select a function to determine how to calculate the totals for the displayed values. |

Table 3-2. Set up Display Options field descriptions for pivot table portlets, continued

| Field Name (*Required) | Description |
|---------------------------|---|
| Display row/column totals | Select to display totals for all rows and columns. The value is calculated using the selected Totals aggregation function . |
| Display subtotals | Select to display subtotals for each row or column. The value is calculated using the selected Totals aggregation function . |
| Hyperlink Options | <p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Adding a Pivot Table Row, Column, or Paging Filter Data Column

To add a new data column (row, column, or paging filter) to a pivot table portlet:

1. Click **Add Column**.

The Add Pivot Column dialog box opens.

Add Pivot Column

*Column Title:

*Data Source Column:

Dimension

☐ Add this column to the pivot rows dimension
☐ Add this column to the pivot columns dimension
☒ Add this column as a pivot paging filter

Done Cancel

2. Provide the column details using the information from the following table.

| Field Name (*Required) | Description |
|---------------------------|---|
| *Column Title | Specify the column title to display in the portlet. Type any alphanumeric string (up to 200 characters in length). |
| *Data Source Column | Select a source column for the information to display in the pivot table column. |
| Dimension | Select the dimension of the data. Choices include: <ul style="list-style-type: none">◦ Add this column to the pivot rows dimension. Data is displayed one row per category. Categories are determined by the values from the data source.◦ Add this column to the pivot columns dimension. Data is displayed one column per category. Categories are determined by the values from the data source.◦ Add this column as a pivot paging filter. Data is displayed one table per category. Categories are determined by the values from the data source. |

3. Click **Done**.

The Add Pivot Column dialog box closes and a new data column is added to the Create Portlet Definition (Pivot Table) page.

Adding a Pivot Table Measurement Data Column

To add a new measurement data column to a pivot table portlet:

1. Click **Add Measurement**.

The Add Measurement dialog box opens.

Add Measurement

*Column Title:

*Data Source Column:

Symbol: ☒ None
☐ %
☐ Currency Symbol

*Number Precision: digits following the decimal point

2. Provide the column details using the information from the following table.

| Field Name (*Required) | Description |
|---------------------------|--|
| *Column Title | Specify the column title to display in the portlet. Type any alphanumeric string (up to 200 characters in length). |
| *Data Source Column | Select a source column for the information to display in the pivot table. |
| Symbol | Select the symbol to display for the measurement. Choices include: <ul style="list-style-type: none">◦ None. Do not display a symbol.◦ %. Display the percentage symbol.◦ Currency Symbol. Select the currency symbol to display. |
| *Number Precision | Specify the number of decimal places to display. |

3. Click **Done**.

The Add Measurement dialog box closes and a new measurement data column is added to the Create Portlet Definition (Pivot Table) page.

Controlling the Size and Number of Unique Values in Pivot Tables

You can use the parameters listed in ["Table 3-3. Server configuration parameters for controlling pivot tables" below](#) to control the size and number of unique values in a pivot table effectively.

Table 3-3. Server configuration parameters for controlling pivot tables

| Parameter | Description | Default Value |
|---|--|---------------|
| dashboard.Pivotdataset-Max-Rows | Determines the maximum number of rows in the List display mode of a pivot table portlet. See "Figure 3-6. List display mode of a pivot table portlet" on the next page for more details. | 25,000 |
| dashboard.Pivotdataset-Max-Cells | Determines the maximum number of cells (number of rows * number columns) in the List display mode of a pivot table portlet. See "Figure 3-6. List display mode of a pivot table portlet" on the next page for more details. | 120,000 |
| dashboard.Pivotdataset-Max-Distinct-In-Column | Determines the maximum number of unique values in any column of a pivot table. See "Figure 3-7. Pivot table display mode of a pivot table portlet" on the next page for more details. | 50 |
| dashboard.Pivotdataset-Max-Distinct-Cells | Determines the maximum number of unique aggregations (product of numbers of unique values in each column) in a pivot table. See "Figure 3-7. Pivot table display mode of a pivot table portlet" on the next page for more details. | 10,000 |

Note: The maximum number of rows in a pivot table is also affected by the `PORTLET_MAX_ROWS_RETURNED` parameter, which determines the maximum number of rows to display in a portlet. The default value for this parameter is 200, meaning that if you have more than 200 rows to display in a pivot table portlet, you must increase the value of the `PORTLET_MAX_ROWS_RETURNED` parameter accordingly.

Caution:

- Performance issues may occur if the value you set for any parameter exceeds the corresponding default value.
- Performance varies with hardware, software, and system configurations in your environment. If performance degrades when system load reaches the default values, HPE recommends that you lower the values of the parameters.

- If a pivot table has a very large volume of data, HPE recommends that you NOT switch between columns and rows in the table.

Figure 3-6. List display mode of a pivot table portlet

| WORK ITEM ▲ | WORK ITEM TYPE | WORK ALLOCATION ID |
|-------------|----------------|--------------------|
| 140773 | Request | 30,045 |
| 177627 | Request | 30,180 |
| 237583 | Request | 30,240 |
| 255522 | Request | 30,260 |
| 74978 | Request | 30,120 |

In "Figure 3-6. List display mode of a pivot table portlet" above, the number of rows in the List display mode of the pivot table portlet is five. If the value of Pivotdataset-Max-Rows is lower than five, you receive an error message, advising you to limit the number of rows.

In "Figure 3-6. List display mode of a pivot table portlet" above, the number of cells in the List display mode of a pivot table portlet is 15 (5 * 3). If the value of Pivotdataset-Max-Cells is lower than 15, you receive an error message advising you to limit the number of cells.

Figure 3-7. Pivot table display mode of a pivot table portlet

| WORK ALLOCATION ID | WORK ITEM TYPE | Misc | Project | Request | Task | Sum (TOTAL) |
|-------------------------|----------------|------|---------|---------|------|-------------|
| ESO CommSee Audit | | 0 | 0 | 0 | 1 | 1 |
| ESO CommSee BPE | | 0 | 0 | 0 | 1 | 1 |
| ESO ProdSup CAAS | | 0 | 0 | 0 | 1 | 1 |
| ESO ProdSup CommBiz R21 | | 0 | 0 | 0 | 1 | 1 |
| ESO ProdSup CommBiz R22 | | 0 | 0 | 0 | 1 | 1 |
| ESO ProdSup CommSee | | 0 | 0 | 0 | 1 | 1 |
| ESO ProdSup FOL | | 0 | 0 | 0 | 1 | 1 |
| ESO ProdSup Imaging | | 0 | 0 | 0 | 1 | 1 |
| Sum (TOTAL) | | 0 | 0 | 0 | 8 | 8 |

In this pivot table, column **WORK ITEM** has eight unique values, which is the largest number of unique values among all columns. If the value of Pivotdataset-Max-Distinct-In-Column is lower than eight, you receive an error message, advising you to limit the number of unique values in this column.

In this pivot table, column **WORK ITEM** has eight unique values, and column **WORK ITEM TYPE** has four unique values. Therefore, the number of unique aggregations is 32 (8 * 4). If the value of `Pivotdataset-Max-Distinct-Cells` is lower than 32, you receive an error message, advising you to limit the number of aggregations in this table.

Note that if a pivot table is larger than 2 MB, the table cannot be exported to Excel. This is caused by a default setting in Apache Tomcat. In Apache Tomcat, the `maxPostSize` attribute determines the maximum size in bytes of the POST, which is to be handled by the container FORM URL parameter parsing. If not specified, this attribute is set to 2097152 (2 MB), which limits the size of the pivot table.

To work around this limitation, edit the Tomcat's `server.xml` file to add the `maxPostSize` attribute to the `Connector` element, and then set the attribute to a larger value in bytes. Alternatively, set the attribute to 0, which disables the size check.

Bar Chart Portlet

Figure 3-8. Set up Display Options for bar chart portlets

Create Portlet Definition (Bar Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

*Bar Source:

Bar Axis Label:

*Bar Value Source:

Value Axis Label:

Orientation:

Color Source:

Tooltip Source:

Hyperlink Options:

- ☒ No Hyperlink
- ☐ Hyperlink Source:
- ☐ Drilldown to Portlet: (None)
- ☐ Portlet Event:

Sample Bar Chart

Cancel Back Next

Table 3-4. Set up Display Options field descriptions for bar chart portlets

| Field Name (*Required) | Description |
|---------------------------|---|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| *Bar Source | Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source. |
| Bar Axis Label | Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length.) |
| *Bar Value Source | Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source. |
| Value Axis Label | Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.) |
| Orientation | Indicate the orientation of the bars. Choices include: <ul style="list-style-type: none"> • Horizontal • Vertical |
| Color Source | Select the source for the color. See "Selecting Portlet Colors" on page 113 for details. |
| Tooltip Source | Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source. |
| Hyperlink Options | Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Clustered Bar Chart Portlet

Figure 3-9. Set up Display Options for clustered bar chart portlets

Create Portlet Definition (Clustered Bar Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

*Cluster Source:

PERIOD_TYPE_NAME

Cluster Axis Label:

*Bar Source:

PERIOD_TYPE_NAME

Bar Label:

*Bar Value Source:

PERIOD_TYPE_NAME

Value Axis Label:

Orientation:

Horizontal

Color Source:

Tooltip Source:

Hyperlink Options:

No Hyperlink

Hyperlink Source:

ACTUALS_TO_DATE

Drilldown to Portlet: (None) Edit

Portlet Event: Edit

Sample Clustered Bar Chart

Chart Title

Cluster Axis Label

Cluster 1

Cluster 2

Cluster 3

(Bar Value) n n n n n n n

Value Axis Label

Bar Label

Bar A

Bar B

Bar C

Cancel

Back

Next

Table 3-5. Set up Display Options field descriptions for clustered bar chart

| Field Name (*Required) | Description |
|---------------------------|---|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| *Cluster Source | Select a source column for the information to be displayed in the cluster. Choices are limited to those columns available in your portlet data source. |
| Cluster Axis Label | Specify the label for the cluster axis. Type any alphanumeric string (up to 200 characters in length.) |
| *Bar Source | Select a source column for the information to be displayed for the bars. Choices are limited to those columns available in your portlet data source. |

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Table 3-5. Set up Display Options field descriptions for clustered bar chart, continued

| Field Name (*Required) | Description |
|---------------------------|---|
| Bar Label | Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length.) |
| *Bar Value Source | Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source. |
| Value Axis Label | Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.) |
| Orientation | Indicate the orientation of the bars. Choices include: <ul style="list-style-type: none"> • Horizontal • Vertical |
| Color Source | Select the source for the color. See "Selecting Portlet Colors" on page 113 for details. |
| Tooltip Source | Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source. |
| Hyperlink Options | Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Stacked Bar Chart Portlet

Figure 3-10. Set up Display Options for stacked bar chart portlets

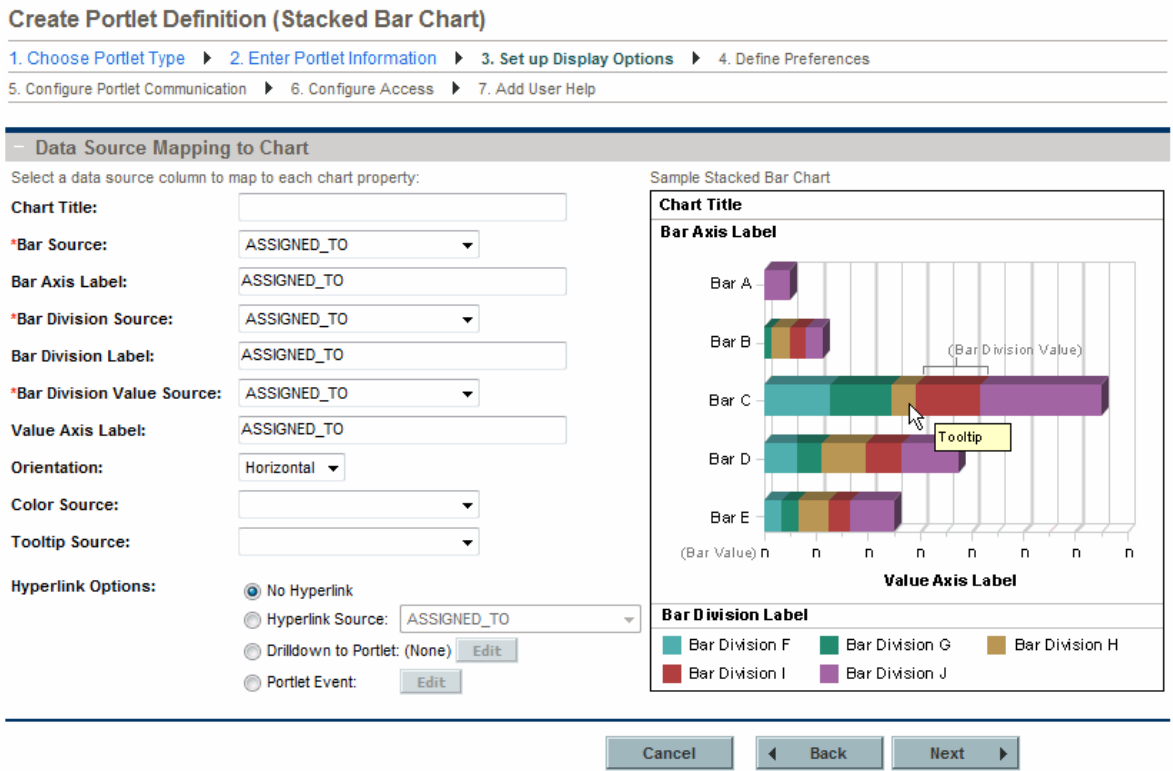


Table 3-6. Set up Display Options field descriptions for stacked bar chart

| Field Name (*Required) | Description |
|------------------------|--|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| *Bar Source | Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source. |
| Bar Axis Label | Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length). |
| *Bar Division Source | Select the source column for the bar divisions. Choices are limited to those columns available in your portlet data source. |

Table 3-6. Set up Display Options field descriptions for stacked bar chart, continued

| Field Name (*Required) | Description |
|----------------------------|--|
| Bar Division Label | Specify the label for the bar divisions. |
| *Bar Division Value Source | <p>Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar).</p> <p>Choices are limited to those columns available in your portlet data source.</p> |
| Value Axis Label | <p>Specify the label for the value axis.</p> <p>Type any alphanumeric string (up to 200 characters in length.)</p> |
| Orientation | <p>Indicate the orientation of the bars.</p> <p>Choices include:</p> <ul style="list-style-type: none"> • Horizontal • Vertical |
| Color Source | <p>Select the source for the color.</p> <p>See "Selecting Portlet Colors" on page 113 for details.</p> |
| Tooltip Source | <p>Select the source column for the tooltip to be displayed when the cursor hovers over an item.</p> <p>Choices are limited to those columns available in your portlet data source.</p> |
| Hyperlink Options | <p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Pie Chart Portlet

Figure 3-11. Set up Display Options for pie chart portlets

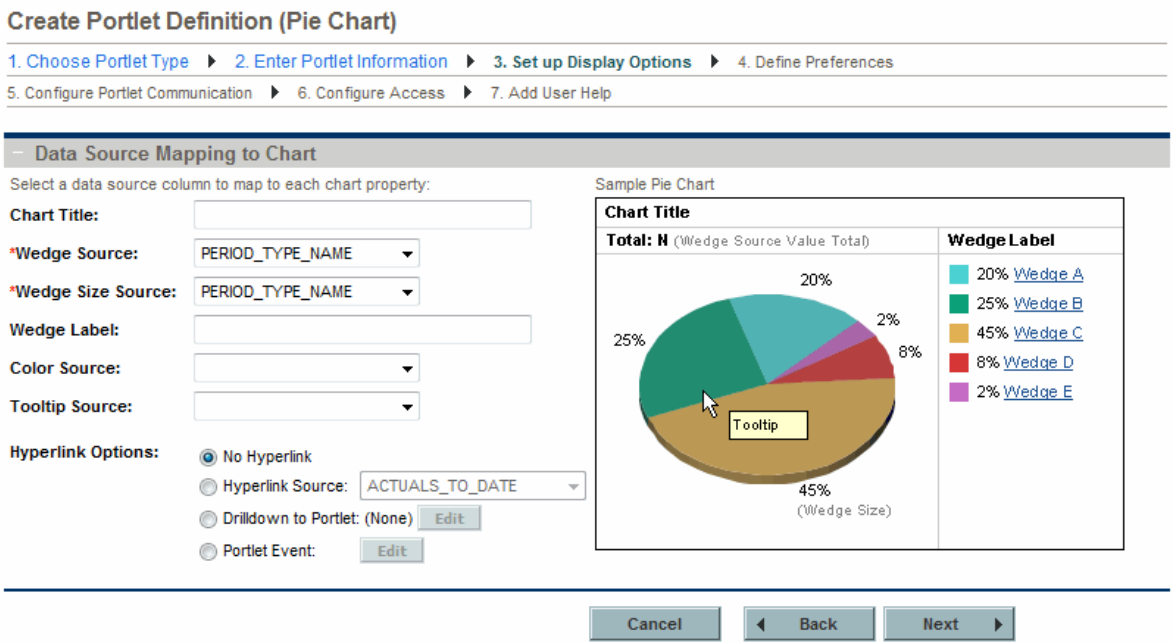


Table 3-7. Set up Display Options field descriptions for pie chart portlets

| Field Name (*Required) | Description |
|---------------------------|---|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| *Wedge Source | Select the source column for the wedge (pie slice). Choices are limited to those columns available in your portlet data source. |
| *Wedge Size Source | Select the <i>numeric</i> source column which determines the size of each wedge. Choices are limited to those columns available in your portlet data source. |
| Wedge Label | Specify a label for the wedges. Type any alphanumeric string (up to 200 characters in length). |
| Color Source | Select the source for the color. See "Selecting Portlet Colors" on page 113 for details. |
| Tooltip Source | Select the source column for the tooltip to be displayed when the cursor hovers |

Table 3-7. Set up Display Options field descriptions for pie chart portlets, continued

| Field Name (*Required) | Description |
|---------------------------|---|
| | <p>over an item.</p> <p>Choices are limited to those columns available in your portlet data source.</p> |
| Hyperlink Options | <p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none">• No Hyperlink. Links to other pages are not allowed.• Hyperlink Source. Link to the selected column.• Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details.• Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Line Chart Portlet

Figure 3-12. Set up Display Options for line chart portlets

Create Portlet Definition (Line Chart)

[1. Choose Portlet Type](#) ▶
 [2. Enter Portlet Information](#) ▶
 [3. Set up Display Options](#) ▶
 [4. Define Preferences](#)
[5. Configure Portlet Communication](#) ▶
 [6. Configure Access](#) ▶
 [7. Add User Help](#)

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

Chart Subtype:

Line

* X-Axis Source:

RESOURCE_INFO

X-Axis Scale:

Ordinal

X-Axis Label:

* Y-Axis Source:

RESOURCE_INFO

Y-Axis Label:

* Line Source:

RESOURCE_INFO

Line Label:

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source:

EFFORT_HOVER

☐ Drilldown to Portlet: (None)

Edit

☐ Portlet Event:

Edit

Sample Line Chart

Chart Title

Y-Axis Label

(Y Value) n

n

n

n

n

n

(X Value) n

n

n

n

n

n

X-Axis Label

Line Label

Line G

Line H

Line I

Line J

Line K

Cancel

Back

Next

Table 3-8. Set up Display Options field descriptions for line chart portlets

| Field Name (*Required) | Description |
|---------------------------|---|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| Chart Subtype | Select Line to set up display options for this portlet. |
| *X-Axis Source | Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source. |
| X-Axis Scale | Select a scale for the x-axis. Choices include ordinal (an ordered sequence or ranking) and numeric . |

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Table 3-8. Set up Display Options field descriptions for line chart portlets, continued

| Field Name (*Required) | Description |
|---------------------------|---|
| X-Axis Label | Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length). |
| *Y-Axis Source | Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source. |
| Y-Axis Label | Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length). |
| *Line Source | Select the source column for each line. Choices are limited to those columns available in your portlet data source. |
| Line Label | Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length). |
| Color Source | Select the source for the color. See "Selecting Portlet Colors" on page 113 for details. |
| Tooltip Source | Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source. |
| Hyperlink Options | Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

XY (Scatter) Line Chart Portlet

Select an XY line chart to display data points without connecting lines.

Figure 3-13. Set up Display Options for XY (scatter) line chart portlets

Create Portlet Definition (Line Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

Chart Subtype: XY (Scatter) ▼

* X-Axis Source: ASSIGNED_TO ▼

X-Axis Scale: Ordinal ▼

X-Axis Label: ASSIGNED_TO

* Y-Axis Source: ASSIGNED_TO ▼

Y-Axis Label: ASSIGNED_TO

* Series Source: ASSIGNED_TO ▼

Series Label: ASSIGNED_TO

Color Source: ▼

Tooltip Source: ▼

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source: ASSIGNED_TO ▼

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample XY Chart

Chart Title

Y-Axis Label

(Y Value) n

n

n

n

n

(X Value) n

n

n

n

n

X-Axis Label

Series Label

Series G Series H Series I

Series J Series K

Tooltip

Table 3-9. Set up Display Options field descriptions for XY (scatter) line chart

| Field Name (*Required) | Description |
|---------------------------|--|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| Chart Subtype | Select XY (Scatter) to set up display options for this portlet. |
| *X-Axis Source | Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source. |
| X-Axis Scale | Select a scale for the x-axis. Choices include ordinal (an ordered sequence or ranking) and numeric . |
| X-Axis Label | Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length). |
| *Y-Axis Source | Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source. |

Table 3-9. Set up Display Options field descriptions for XY (scatter) line chart, continued

| Field Name (*Required) | Description |
|---------------------------|---|
| Y-Axis Label | Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length). |
| *Series Source | Select the source column for each series. Choices are limited to those columns available in your portlet data source. |
| Series Label | Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length). |
| Color Source | Select the source for the color. See "Selecting Portlet Colors" on page 113 for details. |
| Tooltip Source | Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source. |
| Hyperlink Options | Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Radar (Spider) Line Chart Portlet

Select a radar line chart to display cyclic data or data that has no natural order. This chart uses the polar coordinate system.

Figure 3-14. Set up Display Options for radar (spider) line chart portlets

Create Portlet Definition (Line Chart)

1. Choose Portlet Type
2. Enter Portlet Information
3. Set up Display Options
4. Define Preferences

5. Configure Portlet Communication
6. Configure Access
7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

Chart Subtype:

Radar (Spider)

* Category Source:

ASSIGNED_TO

Category Scale:

Ordinal

* Distance Source:

ASSIGNED_TO

* Line Source:

ASSIGNED_TO

Line Label:

ASSIGNED_TO

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink
☐ Hyperlink Source: ASSIGNED_TO
☐ Drilldown to Portlet: (None) [Edit](#)
☐ Portlet Event: [Edit](#)

Sample Radar Chart

Chart Title

Series Label

- Series A
- Series B
- Series C

Cancel

Back

Next

Table 3-10. Set up Display Options field descriptions for radar (spider) line

| Field Name (*Required) | Description |
|---------------------------|--|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| Chart Subtype | Select Radar (Spider) to set up display options for this portlet. |
| *Line Source | Select the source column for each line. Choices are limited to those columns available in your portlet data source. |
| Line Label | Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length). |
| *Category Source | Select the source column for each category on the angular coordinate. Choices are limited to those columns available in your portlet data source. |
| Category Scale | Select a scale for the category. Choices include ordinal (an ordered sequence or ranking) and numeric . |

Table 3-10. Set up Display Options field descriptions for radar (spider) line, continued

| Field Name (*Required) | Description |
|---------------------------|--|
| *Distance Source | <p>Select the source column for each radial coordinate (distance from the center pole).</p> <p>Choices are limited to those columns available in your portlet data source.</p> |
| Color Source | <p>Select the source for the color.</p> <p>See "Selecting Portlet Colors" on page 113 for details.</p> |
| Tooltip Source | <p>Select the source column for the tooltip to be displayed when the cursor hovers over an item.</p> <p>Choices are limited to those columns available in your portlet data source.</p> |
| Hyperlink Options | <p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. See "Defining a Drill-down Page" on page 56 for details. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Bubble Chart Portlet

Figure 3-15. Set up Display Options for bubble chart portlets

Create Portlet Definition (Bubble Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

*X-Axis Source:

PERIOD_TYPE_NAME

X-Axis Label:

*Y-Axis Source:

PERIOD_TYPE_NAME

Y-Axis Label:

*Bubble Size Source:

PERIOD_TYPE_NAME

Bubble Size Label:

Color Source:

Color Label Source:

Color Label:

Tooltip Source:

Hyperlink Options:

No Hyperlink

Hyperlink Source:

ACTUALS_TO_DATE

Drilldown to Portlet: (None)

Edit

Portlet Event:

Edit

Sample Bubble Chart

Chart Title

Y-Axis Label

(Y Value) n

n

n

n

n

n

(X Value) n

n

n

n

n

n

X-Axis Label

Color Label

Color Label A

Color Label B

Color Label C

Cancel

Back

Next

Table 3-11. Set up Display Options field descriptions for bubble chart portlets

| Field Name (*Required) | Description |
|---------------------------|---|
| Chart Title | Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length). |
| *X-Axis Source | Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source. |
| X-Axis Label | Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length). |
| *Y-Axis Source | Select the <i>numeric</i> source column for the y-axis. |

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Table 3-11. Set up Display Options field descriptions for bubble chart portlets, continued

| Field Name (*Required) | Description |
|---------------------------|--|
| | Choices are limited to those columns available in your portlet data source. |
| Y-Axis Label | Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length). |
| *Bubble Size Source | Select the source column for the size of the bubble. Choices are limited to those columns available in your portlet data source. |
| Bubble Size Label | Specify the label for the bubble size. Type any alphanumeric string (up to 200 characters in length). |
| Color Source | Select the source for the color. See "Selecting Portlet Colors" on the next page for details. |
| Color Label Source | Select the source for the labels associated with the colors. |
| Color Label | Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length). |
| Tooltip Source | Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source. |
| Hyperlink Options | Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> • No Hyperlink. Links to other pages are not allowed. • Hyperlink Source. Link to the selected column. • Drilldown to Portlet. Drill down to the selected portlet. • Portlet Event. Update the portlets on this page. See "Defining a Portlet Event" on page 74 for details. |

Note: You can limit the number of bubbles displayed in the bubble chart by setting the `MAX_BUBBLE_CHART_RESULT` parameter. By default, up to 500 bubbles are displayed. See the *Installation and Administration Guide* for more information about setting this parameter.

Setting the Displayed Color Label Length for a Bubble Chart

If the legend of a bubble chart contains many color labels, the labels may be truncated. You can extend the displayed color label length by doing the following:

1. Edit the `<PPM_Home>/server/<PPM_Server_Name>/deploy/dashboard.war/static/app/portlet/css/BubbleChart.css` file:
 - a. Find the `maxLegendItemLength` key and increase its value. The value is in pixels. About 1,000 pixels is equal to the 200 character color label length limit.
 - b. Save the file.
2. Repeat [Step 1](#) for all nodes in a cluster.
3. Restart the PPM Server.

Selecting Portlet Colors

Most of the portlet types include the option to specify particular colors for a portlet. Unlike the default color map that selects and changes the colors seemingly at random, the colors you specify will always be used when the portlet is displayed.

To specify color mappings for a portlet requires configuration of the:

- Portlet data source
- Portlet definition

Defining Color Maps in the Portlet Data Source

To specify a color map for a portlet, refer to ["Creating and Maintaining Portlet Data Sources" on page 13](#). In the section ["Completing the Data Source Tab" on page 18](#), you will need to add (or modify) columns to specify the color map.

In general, color mappings:

- Should correspond to the column used in the Order By clause
- Can be indicated for one or more of the Order By values
- Color can be specified by:
 - Name (such as LemonChiffon)
 - Hexadecimal code (for example, #FFFACD)

Names or codes are case-insensitive.

"Color Names" on page 134 provides a comprehensive list of color names and some recommendations about their use.

Tip: Specific colors can also be specified based on portlet field labels; however, these settings are instance-wide. This can be especially helpful for making colors consistent for field labels such as High, Medium, or Low. See the *Customizing the Standard Interface* guide for details.

"Figure 3-16. Color map in the portlet data source" on the next page shows examples of these settings in the **Select** section of the Select/From tab of the Query Definition window (see "Creating and Maintaining Portlet Data Sources" on page 13 for details about this window).

- The values for priority_code column include the priorities associated with a request (of the type being displayed in this portlet):
 - Normal
 - Low
 - High
 - Critical
 - None
- The Display_order column ranks the values of the priority codes
- The Order By clause specifies the use of the Display_order column
- The Color column specifies the relationship of the colors to the display order as follows:
 - Wheat (by hexadecimal code) for Normal
 - MistyRose for Low
 - The default color for High (which means the color is subject to change)

- CadetBlue for Critical
- Tomato for None

Tip: The colors shown in this example, as well as the choice of portlet are probably unrealistic. You probably want to select colors that are meaningful to your organization and more practical than those selected for this example.

Figure 3-16. Color map in the portlet data source

The screenshot shows a 'Query Definition' dialog box with a tabbed interface. The 'Select/From' tab is active. Below the tabs, there is a 'Select' section with a text area containing the instruction: 'You can use any Database columns or SQL expression to create columns for the SELECT portion of the query and enter the FROM portion directly.' Below this is a table with four columns: 'Column Name', 'Column Type', 'Description', and 'SQL'.

| Column Name | Column Type | Description | SQL |
|---------------|-------------|---------------|---|
| something1 | Text | something1 | something1 |
| priority_code | Text | priority_code | decode(priority_code,NULL,'None',priority_code,priority_code) |
| Color | Text | color | decode(priority_code,NULL,'tomato','NORMAL','#F5DEB3','LOW','mistyrose','CRITICAL','CadetBlue') |
| Display_order | Text | order | decode(priority_code,NULL,1,'NORMAL',2,'LOW',3,'HIGH',4,'CRITICAL',5) |

Below the table are 'Add', 'Edit', and 'Remove' buttons. The 'From Clause' section contains a text area with 'FROM somewhere' and an 'Enlarge' button. The 'Where/Group By/Having/Order By Clauses' section contains a text area with the following SQL clauses:

```
WHERE 1=1
group by priority_code
order by display_order
```

At the bottom, there is a 'View Full Query' button and 'OK', 'Apply', and 'Cancel' buttons. The status bar at the very bottom says 'Ready'.

Specifying the Color Map in the Portlet Definition

Once a portlet data source includes a color map, you can specify its use in a color specification-enabled portlet.

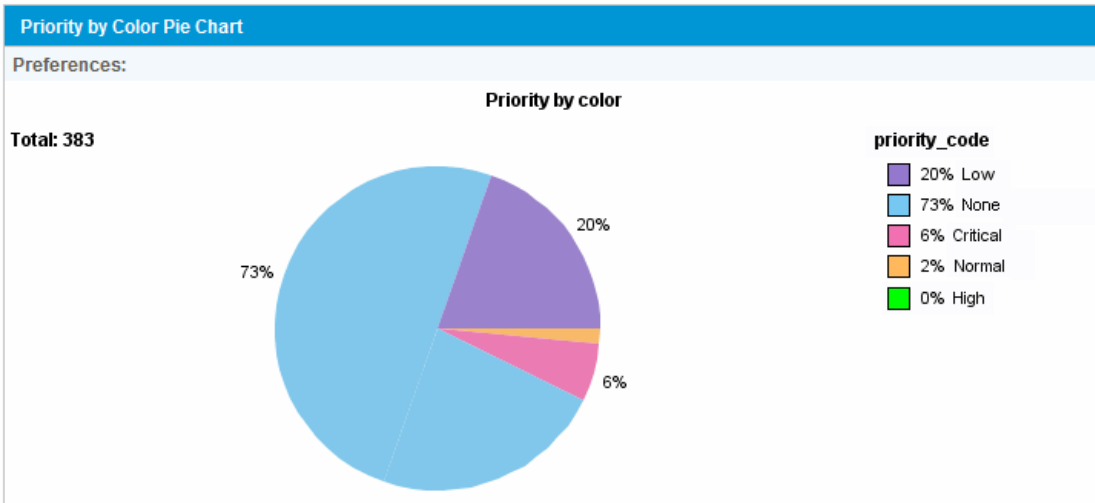
"Figure 3-17. Default color map" on the next page shows a preview of a pie chart that uses the default color map.

As shown in "Figure 3-19. Selected color mappings" on the next page, specifying a color map can help establish consistency of the portlet coloration and, potentially, its interpretation.

Figure 3-17. Default color map

Portlet Definition Preview

This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet are the default preference values configured for this portlet definition.



To specify use of a color map available in a portlet's data source, select the color map's column for the **Color Source** as shown in "Figure 3-18. Set up Display Options with color specification" below.

Figure 3-18. Set up Display Options with color specification

Create Portlet Definition (Pie Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title: Priority by color

***Wedge Source:** priority_code

***Wedge Size Source:** request_count

Wedge Label: priority_code

Color Source: Color

Tooltip Source:

Hyperlink Options:

- ☒ No Hyperlink
- ☐ Hyperlink Source: Category
- ☐ Drilldown to Portlet: (None) Edit
- ☐ Portlet Event: Edit

Sample Pie Chart

Chart Title

Total: N (Wedge Source Value Total)

Wedge Label

- 20% Wedge A
- 25% Wedge B
- 45% Wedge C
- 8% Wedge D
- 2% Wedge E

20%

25%

45% (Wedge Size)

8%

2%

Tooltip

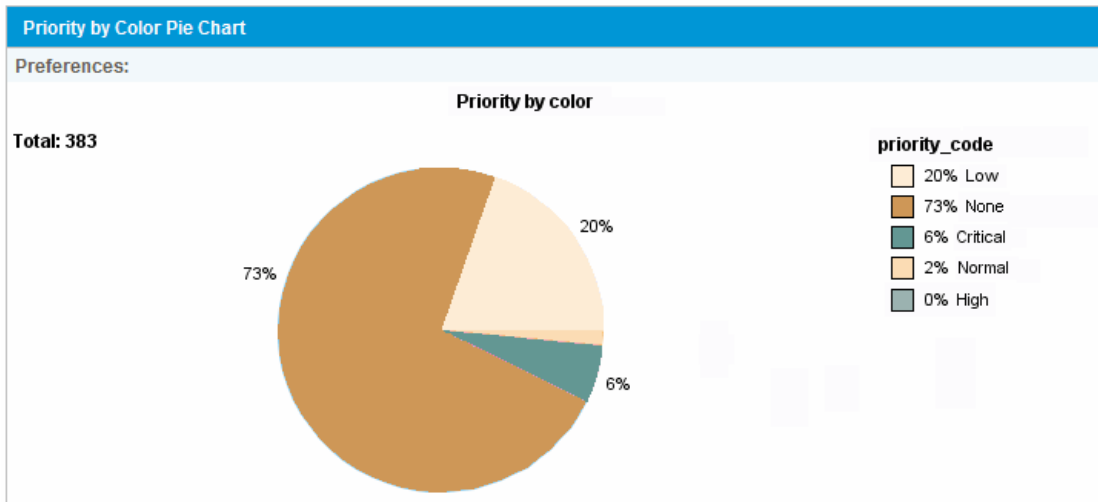
Cancel Back Next

The resulting preview is shown in "Figure 3-19. Selected color mappings" on the next page.

Figure 3-19. Selected color mappings

Portlet Definition Preview

This is a portlet definition preview. It is not a live portlet so all links are disabled. Please note that the preference values used to render this portlet are the default preference values configured for this portlet definition.



Show Total Checkbox for the Define Preferences Step

If you are creating a portlet that belongs to one of the following four portlet types:

- Bar Chart
- Stacked Bar Chart
- Clustered Bar Chart
- Pie Chart

You may notice that a new checkbox **Show Total** is available on the Define Preferences Step of the Create Portlet Definition page. This checkbox allows you to control whether or not to display the Total data.

Create Portlet Definition (Bar Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Preference Form Layout

Click and drag to select and move fields

Drag outside box to cancel movement

Edit

☒ Show Preferences summary on this portlet (user can choose to hide it)

☐ Require user to edit preferences before viewing portlet for the first time

☒ Show Total

Cancel

◀ Back

Next ▶

Preview

Finish

By default, this check box is selected. If you keep this checkbox selected when creating portlet definition, the Total data will be displayed in the customized portlets. If you deselect this check box, the Total data will not be displayed.

Chapter 4: Creating and Maintaining PPM Dashboard Pages and Modules

About PPM Dashboard Pages and Modules

Modules are either provided by HPE or application administrators and can be supplied to users as either Private Dashboard pages or Shared Dashboard pages. Modules must have a unique name and can contain one or more Dashboard pages, each with one or more portlets.

Private Dashboard Pages

Private Dashboard pages are modules that users add from preconfigured pages. And users find them in the Private pages folder of the Personalize Dashboard page. These private Dashboard pages can be edited and personalized by users to increase their usefulness. Preconfigured pages available to be added into Private Dashboard pages are provided by either HPE or application administrators.

HPE-Provided Preconfigured Pages

HPE-Provided preconfigured pages are listed after you click the **Add preconfigured pages** drop-down menu item located on the Personalize Dashboard page (see ["Figure 4-1. Personalize Dashboard page" on the next page](#) and ["Figure 4-2. Add Preconfigured Pages to Dashboard dialog box" on the next page](#)).

Application Administrator-Provided Preconfigured Pages

Modules created by application administrators appear in the Shared pages folder on the Personalize Dashboard page (such as Sample, shown in ["Figure 4-1. Personalize Dashboard page" on the next page](#)). Administrator-provided preconfigured pages are modules that administrators have configured so that end users can add them to the Private pages folder by the copy and paste functionality or by using the **Add preconfigured pages**. Once moved to the Private pages folder, administrator-provided preconfigured pages can be personalized by the user; modules appearing in the Shared pages folder cannot be edited.

For information about configuring modules, see ["Modifying Modules" on page 124](#).

Figure 4-1. Personalize Dashboard page

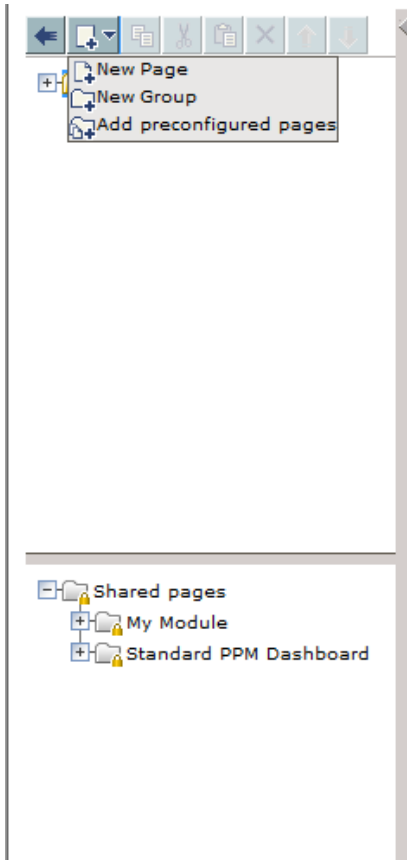
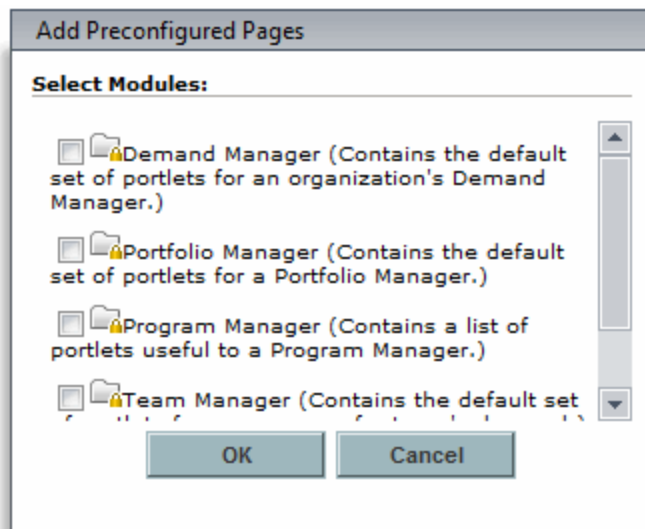


Figure 4-2. Add Preconfigured Pages to Dashboard dialog box



Shared Dashboard Pages

Shared Dashboard pages are modules that are created by application administrators and users find these in their Shared pages folder. Shared modules can be configured such that users can add them to the Private pages folder and edit them, or shared modules can be made uneditable—these type of modules are especially useful when application administrators want to share specific details and status with their stakeholders.

Landing Page (Default PPM Dashboard Page)

The landing page is the default PPM Dashboard page that displays when a user logs on to PPM Center. This page can be configured by the application administrator.

If the user does not have access to the module that contains the landing page, the user's first private page is used as the default PPM Dashboard page. If the user also does not have any private pages configured, the first shared page is used as the default PPM Dashboard page.

For information on how to configure this page, see ["Configuring the Landing Page \(Default PPM Dashboard Page\)" on page 131](#).

The module's name appears in the **Preconfigured Pages** column and the module's description is listed in the **Description** column.

Searching for Modules

To search for an existing module:

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

The Configure Modules page appears.

Configure Modules

3. Provide the search criteria using the information from the following table.

| Field Name (*Required) | Description |
|--|---|
| Name starts with | Specify a string. The search results display all modules whose name starts with the specified string. Type any alphanumeric string (up to 255 characters in length). |
| Show only modules that have changed since last publication | Indicate whether to show only modules that have been modified since they were last published. |
| Created By | Select the user who created the module. |
| Last Updated From <Date> To <Date> | Select the date range when the module was last updated. |
| Last Published From <Date> To <Date> | Select the date range when the module was last published. |
| Available to Users | Select one or more users who have access to the module. |
| Groups | Select one or more groups who have access to the module. |
| Org-Units | Select one or more groups who have access to the module. |
| Status | Select the status criteria: Choices include: <ul style="list-style-type: none"> o All |

| Field Name (*Required) | Description |
|-----------------------------|---|
| | <ul style="list-style-type: none">◦ Enabled◦ Disabled |
| Sort By | Select the sort criteria. Choices include: <ul style="list-style-type: none">◦ Name◦ Last Updated On◦ Status |
| Ascending/Descending | Indicate the sorting sequence. |
| *Results Displayed Per Page | Specify the maximum number of search results to display on a page. Type any integer, including zero. |

Tip: Click **Reset Form** if you would like to clear your current search criteria.

4. Click **Search**.

The Configure Modules page is updated to include the search results which are displayed in the **Select a Module to Configure** section. If the list of results is long, click **Prev** and **Next** to navigate the list.

Configure Modules

These Modules are maintained only by Administrators. Users that wish to personalize module pages must copy the pages to their private dashboard area.

Select a Module to Configure

Showing 1 to 8 of 8

Prev

Next

| Name ▲ | Description | Last Updated On | Status |
|--|--|-----------------|---------|
| <input checked="" type="checkbox"/> Capital Exposure | Dashboard to display the state of capitalized costs in the current portfolio broken down by project. | 6/24/12 | Enabled |
| <input checked="" type="checkbox"/> Demand Manager | Contains the default set of portlets for an organization's Demand Manager. | 6/24/12 | Enabled |
| <input checked="" type="checkbox"/> My Module | My Module Desc | 7/6/12 | Enabled |
| <input checked="" type="checkbox"/> Portfolio Manager | Contains the default set of portlets for a Portfolio Manager. | 6/24/12 | Enabled |
| <input checked="" type="checkbox"/> Program Manager | Contains a list of portlets useful to a Program Manager. | 6/24/12 | Enabled |
| <input checked="" type="checkbox"/> Standard PPM Dashboard | Standard PPM Dashboard | 6/24/12 | Enabled |
| <input checked="" type="checkbox"/> Team Manager | Contains the default set of portlets for a manager of a team's demand. | 6/24/12 | Enabled |
| <input checked="" type="checkbox"/> Time Management | Contains portlets for a new Time Management user. | 6/24/12 | Enabled |

Configure Modules

All

None

Search for a Module to Configure

Reset Form

Name starts with:

Created By:

Last Updated From:

To:

Available to Users:

Groups:

Org-Units:

Status:

All

Sort By:

Name

Ascending

Descending

*Results Displayed Per Page:

50

Search

From the Configure Modules page you can:

- **Select a module.** In the **Select a Module to Configure** section, either select the checkbox associated with the desired module or click the link for the module.
- **Delete a module.** In the **Select a Module to Configure** section, click the delete icon next to the module you want to delete.
- **Sort the modules.** In the **Select a Module to Configure** section, click on a column header to change the sort criteria or sequence.
- **Refine your search.** In the Search for a Module to Configure section, provide the search criteria detailed in [Step 3](#).

Modifying Modules

To change an existing module:

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

The Configure Modules page appears, as shown in Step 2 ("From the menu bar, select Open > Administration > Modules > Configure Modules." on page 121).

3. Search for and select a module.

For detailed instructions on how to search for and select modules, see "Searching for Modules" on page 121.

The Personalize Dashboard page appears, as shown in Step 6 ("Click Create." on the next page).

4. From this page, you can do the following:
 - Change the contents or accessibility of a module, see "Creating Modules" below.
 - Copy the module, see "Copying Modules" on page 129.
 - Remove the module, see "Deleting Modules" on page 130.

Note: If your PPM Center instance supports multiple languages and the module is defined in a language other than your session language, you cannot modify the module. For more information click **here** in the header or see *Multilingual User Interface Guide*.

Creating Modules

To create a module:

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

The Create Module page appears.

Tip: If you are already in the Personalize Dashboard page, you can highlight **Modules** and select **New Module** from the drop-down menu to create a new module.

3. In the **Module Name** field, type the name of the module.
4. (Optional, although highly recommended) In the **Description** field, type a brief description of the module.
5. (Optional) Select the desired **Enabled** option.

6. Click **Create**.

The Personalize Dashboard page appears and includes the Configure: <Module_Name> display.

Configure: New Module 0 Save

Header

Created By: John Groom

Last Modified By: John Groom Last Modification Date: 8/22/12

* Module Name:

Description:

Enabled: ☒ Yes ☐ No

Administrator Comments

Comments enables the administrator to share information about changes in the module with the module recipients.

Add Comment:

View Comments

Configure Access

Read-Only Access

The following users/security-groups will have read-only access to this module

☐ Allow access to all users

Allow access only to the following users/security-groups:

| Security Type | Name |
|---------------|------|
| No Users | |

Add Users: +

☒ Enable users to copy this module pages to their private dashboard

Administrator Access

Users specified below will have access to modify this Module.

| Security Type | Name |
|---------------|------|
| All Users | |

Give Access to: +

Self-Service Access

☐ Allow Users to add this module to their own Dashboards as Preconfigured Pages.

Allow access to the following users and groups:

| Security Type | Name |
|---------------|------|
| All Users | |

Give Access to: +

Save

Note: The contents of the page may differ depending on the module chosen.

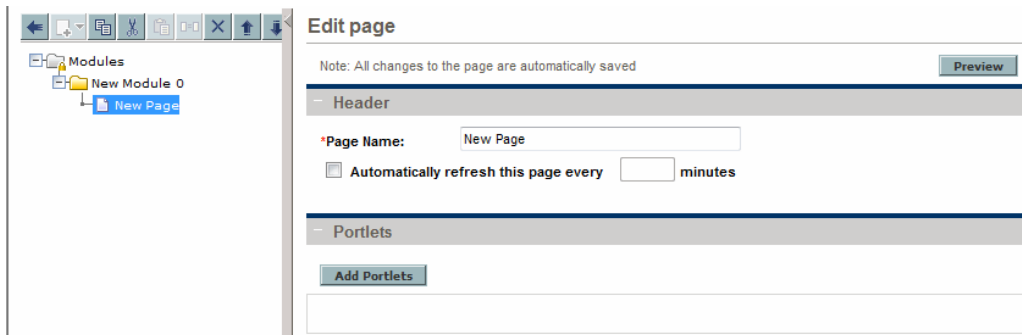
7. (Optional) In the **Header** section, update the data in the appropriate fields.
8. (Optional, although highly recommended) In the **Administrator Comments** section, add

comments as desired.

Tip: Click **Save** before clicking **View Comments** to view the comments you just added.

9. In the **Configure Access** section, specify to whom, and the type of, access of the module should be granted.
10. Add Dashboard pages and portlets as desired.
 - a. To add a page, either:
 - Select the **New Page** file from the folder containing the new module
 - Select the module from the Modules folder and select either **Add > Add New Page** or **Add > Add user pages** (following a right-click).

The Personalize Dashboard page appears and includes the Edit page display.



- b. (Optional) Rename the page.
 - c. (Optional) Set the page refresh rate.
 - d. Click **Add Portlets**.

The Add Portlets dialog box appears.

Add Portlets

Add Portlets

Search for Portlets to Add

Category:

Portlet Name:

Find Portlets

Add **Cancel**

Note:

- When the length of a word in a portlet name exceeds 30 characters (without a space), after you click **Find Portlets** in the **Add Portlets** window, the Portlet Name column in the resulting list is resized automatically, other columns are pushed to the right side, and no horizontal scrollbar is available. If the word is really long (say, 100 characters), the buttons in the right side of the window may disappear. In this case, maximize the **Add Portlets** window.
- Make sure not to include any HTML related characters in the description of a request. When a request contains HTML related characters in its request description, the request is not displayed in the **My Requests** portlet.

f. Search for portlets to add.

- To list all the portlets, click **Find Portlets**. The **Select Portlets to Add** section is added to the Add Portlets dialog. The **Select Portlets to Add** section lists all the portlets.
- To list specific portlets:
 - A. In **Category**, select the portlet's category from the drop-down list.
 - B. In **Portlet Name**, provide all or part of the portlet's name.
 - C. Click **Find Portlets**.

The **Select Portlets to Add** section is added to the Add Portlets dialog. The **Select Portlets to Add** section lists all of the portlets matching the search criteria.

g. In the **Select Portlets to Add** section, select one or more portlets and click **Add**.

- h. (Optional) Click **Preview** to review the results.
11. Repeat [Step 10](#) until the module is configured as desired.

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

Sharing Modules

To share a module:

1. Select the module name from the Modules folder.
2. In the Header section, select the **Yes** option for **Enabled**.
3. In the Configure Access section, select the **Allow access to all users** and **Enable users to copy this module pages to their private dashboard** checkboxes.
4. Click **Save**.

Copying Modules

To copy an existing module and use it as the basis for a new module:

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

The Configure Modules page appears.

3. Search for and select a module.

For complete information on how to search for and select modules, see ["Searching for Modules" on page 121](#).

The Personalize Dashboard page appears.

4. Select the name of the module from the Modules folder.
5. Click the **Clone** icon (or right-click the module name and select **Clone**).

An advisory dialog box appears.

6. Click **OK**.

A copy of the module will appear in the Modules folder.

7. Select the name of the copied module.
8. Change the settings of the copied module using the steps detailed in ["Creating Modules" on page 125](#).

Tip: Remember to enable the module once the settings are updated.

9. Click **Save**.

Deleting Modules

To delete an existing module:

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

The Configure Modules page appears.

3. Search for and select a module.

For complete information on how to search for and select modules, see ["Searching for Modules" on page 121](#).

The Personalize Dashboard page appears.

4. Select the name of the module from the Modules folder.
5. Click the **Delete** icon (or right-click the module name and select **Delete**).

A confirmation dialog box opens.

6. Click **OK**.

Configuring the Landing Page (Default PPM Dashboard Page)

The landing page is the default PPM Dashboard page that is configured to display when a user logs on to PPM Center. This page is configured by the application administrator to meet the business requirements of users or security groups.

Note: If a default PPM Dashboard page is not configured, the first private page listed in the Private pages folder becomes the default page. If no private pages have been configured, the first shared page listed in the Shared pages folder becomes the default page.

To configure the default PPM Dashboard page you must set the landing page and configure the module's access:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**.

The Set Landing page appears.

3. Select the **Enable default Landing page** checkbox.
4. Select the name of the module that contains the default landing page.
5. Select the name of the page.
6. Click **Save**.

The message The Landing page has been successfully configured. In order to set the Landing Page users' access, configure the parent module's access appears above the Configure Landing Page section.

7. Click **configure the parent module's access**.

The Configure: <module_name> page appears.

8. Expand the Configure Access section and add read-only access for all users or selected users.
9. Click **Save**.

Changing the Landing Page

Changing the landing page is changing the default PPM Dashboard page that displays when a user logs on to PPM Center. For information on how to modify or edit the contents of the landing page, see the *Getting Started* Guide.

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**.

The Set Landing page appears.

3. Select the name of the module that contains the default landing page.
4. Select the name of the page.
5. Click **Save**.

The message The Landing page has been successfully configured. In order to set the Landing Page users' access, configure the parent module's access appears above the Configure Landing Page section.

6. Click **configure the parent module's access**.

The Configure: <module_name> page appears.

7. Expand the Configure Access section and add read-only access for all users or selected users.
8. Click **Save**.

Disabling the Landing Page

You can disable the landing page by either disabling the feature or by disabling the module's access. When the landing page is disabled, the first page listed in the Private pages folder becomes the default PPM Dashboard page. If no private pages are configured, the first page listed in the Shared pages folder becomes the default PPM Dashboard page.

To disable the landing page without changing the module's access:

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

Dashboard Page. The Set Landing page appears.

3. Unselect the **Enable default Landing page** checkbox.
4. Click **Save**.

To disable the landing page by disabling the module's access:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**. The Set Landing page appears.
3. Click **Save**.

The message The Landing page has been successfully configured. In order to set the Landing Page users' access, configure the parent module's access appears above the Configure Landing Page section.

4. Click **configure the parent module's access**.

The Configure: `<module_name>` page appears.

5. Expand the Configure Access section and remove read-only access for all users or selected users.
6. Click **Save**.

Appendix A: Color Names

This appendix provides the table of color names that are supported by most browsers. These are the color names referenced in "Selecting Portlet Colors" on page 113.

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 the portlet, you should use the hexadecimal values rather than the color names.

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

Table A-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 |

Table A-1. Color names, continued

| Color Name | Hex Value |
|----------------|-----------|
| Coral | #FF7F50 |
| ComflowerBlue | #6495ED |
| Cornsilk | #FFF8DC |
| Crimson | #DC143C |
| 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 |

Table A-1. Color names, continued

| Color Name | Hex Value |
|----------------------|-----------|
| FireBrick | #B22222 |
| FloralWhite | #FFFAF0 |
| ForestGreen | #228B22 |
| 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 | #FFFFFF |
| Khaki | #F0E68C |
| Lavender | #E6E6FA |
| LavenderBlush | #FFF0F5 |
| LawnGreen | #7CFC00 |
| LemonChiffon | #FFFACD |
| LightBlue | #ADD8E6 |
| LightCoral | #F08080 |
| LightCyan | #E0FFFF |
| LightGoldenrodYellow | #FAFAD2 |
| LightGrey | #D3D3D3 |
| LightGreen | #90EE90 |

Table A-1. Color names, continued

| Color Name | Hex Value |
|-------------------|-----------|
| LightPink | #FFB6C1 |
| LightSalmon | #FFA07A |
| 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 |

Table A-1. Color names, continued

| Color Name | Hex Value |
|---------------|-----------|
| Navy | #000080 |
| 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 |

Table A-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: Exporting Portlets to Excel

Starting from PPM Center 9.30, clicking **Export to Excel** on a portlet exports the portlet data to an `xlsx` file (Microsoft Excel file) instead of HTML file. This enhancement enables you to process data by using more Microsoft Excel features.

Note that if you use this enhanced Export to Excel functionality, the format of the data which is maintained in the HTML files may be lost in the Excel files.

For example, if you export a portlet with colors to Excel, the colors are not displayed in the Excel file. To fix this issue, you should add a new column as the image field when defining the portlet data source. The value of the image field should be in the following format:

```

```

Then when you export the portlet to Excel, the image field will be filled with the color specified by the field value in the Excel file.

Starting from PPM Center 9.31.0001, the option **Export to HTML Excel** is added in the Edit Preference page. With this option available, you can decide the portlet is exported to an `xlsx` file (Microsoft Excel file) or an `xls` file (HTML file). If you select this option, the portlet is exported to an `xls` file. PPM behaves the same as it does in versions earlier than 9.30 when exporting portlets to Excel. If you do not select this option, the portlet is exported to an `xlsx` file.

Note: The **Export to HTML Excel** option is only available in the Edit Preference page of builder portlets.

Send documentation feedback

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

Feedback on Creating Portlets and Modules (Project and Portfolio Management Center 9.40)

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 your_IE_team_PDL@hpe.com.

We appreciate your feedback!