



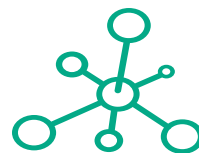
# Project and Portfolio Management Center

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## HPE-Supplied Entities Guide

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# Chapter 1: HPE-Supplied Reports

The following table lists the reports provided as part of PPM Center. Availability depends on having the applicable licenses, security group assignment, access grants, and products.

In the table, the subheadings are alphabetized categories, and the reports are alphabetized within each category. The table indicates which reports are available in two categories, and such reports are described in more detail in the first of the two categories.

**Note:** Users must have the System: Submit Reports access grant to view or submit any report, in addition to required security groups shown in the following table.

Report Name	Required License	Required Security Group	Description
<b>Administrative category</b>			
Contact Synchronization	Configuration	One or more of the following security groups: <ul style="list-style-type: none"> <li>• PPM Administrator</li> <li>• PPM All Access Grants</li> <li>• PPM Billing Manager</li> <li>• PPM Cost Manager</li> <li>• PPM Demand Management Administrator</li> <li>• PPM Demand Manager</li> <li>• PPM Deployment Management Administrator</li> <li>• PPM Program Manager</li> <li>• PPM Project Manager</li> <li>• PPM Resource Manager</li> <li>• PPM Service Security Group</li> <li>• PPM Team Manager</li> <li>• PPM Time Administrator</li> <li>• PPM Time Manager</li> </ul>	Ensures that contacts are properly defined. Detects all users with no corresponding contact record, and creates one for them. Also corrects discrepancies between user and contact data.  Also available for the Resource Management category.

Report Name	Required License	Required Security Group	Description
		<ul style="list-style-type: none"> <li>• PPM User</li> <li>• PPM User Admin</li> </ul>	
Data Source Detail	Configuration		Shows the configuration details of one or more data sources. Provides all filter fields, displayed columns, query, and what uses each data source.
Import Requests	Configuration		Validates and loads request data from the open interface tables into the data model.
Import Users	User Administration		Imports data from the user interface tables or an LDAP server.
Lookup Types	Configuration		Shows the configuration details of one or more lookups.
Notification History	Configuration		Shows notifications that have been sent or are pending.
Object Type Detail	Configuration		Shows the configuration details of one or more object types. Includes detailed information about each field and command associated with selected object types. Also useful for debugging deployment problems.
Overview Section Detail	Configuration		Shows the configuration details of one or more Overview Sections. Provides all filter fields, displayed columns, query, security, URLs, and which users use each Overview Section.
Portlet Definition Detail	Configuration		Shows the configuration details of one or more Portlet Definitions. Details all preferences, display options, access, and help for each

Report Name	Required License	Required Security Group	Description
			Portlet Definition.
Portlet Performance	User Administration		Shows one or both of the following set of performance results for a page or selected portlets: <ul style="list-style-type: none"> <li>• Aggregated average execution time, and maximum, minimum, and total time to invoke the page or portlets</li> <li>• Information about the page or portlet with the worst execution time.</li> </ul>
Report Type Detail	Configuration		Shows the configuration details of one or more report types. Includes detailed information about each field and command associated with selected report types. Also useful for debugging report submission problems.
Request Header Type Detail	Configuration		Shows the configuration details of one or more request header types. Useful for auditing your setup as well as debugging problems related to specific request header types.
Request Type Detail	Configuration		Shows the configuration details of one or more request types. Details all custom fields, possible statuses, default logic, and commands for each request type.
Run Field Security Denormalization	Configuration		Runs field-level security-related denormalization tasks for particular entities.
Run PPM Organization Unit Interface	User Administration		Imports data from the organization unit interface tables or an LDAP server.

Report Name	Required License	Required Security Group	Description
Run PPM Package Interface	Configuration		Validates and loads package data from the open interface tables into the data model.
Run Workflow Transaction Interface	Configuration		Validates and runs workflow transactions based on data present in the workflow open interface tables. Used to kick off process steps from outside the end-user screens.
Security Group Detail	User Administration		Shows the configuration details of one or more security groups. Includes user membership, workflow step access, and screen access levels for each selected group.
SOX - Security Change	Any		Provides the history of security changes.
SOX - Security Validation	Any		Lists users with multiple roles through security groups linked to workflow steps.
Special Command Detail	Any		Shows the configuration details of one or more special commands. Useful for debugging execution problems.
Synchronize Meta Layer	Configuration		Assesses or synchronizes the Meta Layer.
Translation Details	Configuration		For the languages and entity types or particular entities you select, shows the entity name highlighted in its definition language and translations to any other selected languages.
Translation Summary	Configuration		For the languages and entity types you select, shows the entity name, the language in which it is defined, and the other languages to which it

Report Name	Required License	Required Security Group	Description
			has been translated or partially translated.
User Data Detail	Configuration		Shows the definition of custom user data fields. Output is grouped by user data entity and lists all fields for each entity and any referenced validations.
User Detail	User Administration		Shows the configuration details of one or more users. Includes header details as well as security group membership.  Also available for the Resource Management category.
Validations	Configuration		Shows the configuration details of one or more validations.
Workflow Detail	Configuration		Shows the configuration details of one or more workflows. Includes all workflow steps and their possible outcomes, transitions, and notifications. Also useful for analyzing workflow processes.
Workflow Statistics	Configuration		Shows workflow statistics, such as percent usage of a particular workflow, average/maximum/minimum completion times, percent step traversal, and so forth.
<b>Demand Management category</b>			
ALM - Change Summary	Demand Management		Provides a list of requests for change (RFCs) that have been implemented, grouped by change category. Availability requires installation of Application



Report Name	Required License	Required Security Group	Description
			Lifecycle Management (ALM) software.
ALM - Forward Schedule of Changes for RFC	Demand Management		Serves as a key report in the change management process. Provides a list of all the RFCs that are scheduled to be implemented. Availability requires installation of ALM software.
ALM - Forward Schedule of Releases	Demand Management		Serves as a key report in the release management process. Provides a list of all releases that are scheduled to be implemented into the LIVE environment. Availability requires installation of ALM software.
ALM - Release Content	Demand Management		Provides a list of RFCs that have been incorporated into a release. Availability requires installation of ALM software.
ALM - Release Summary	Demand Management		Provides a list of releases that have been implemented. Availability requires installation of ALM software.
Contact Detail	Demand Management		Shows the details of one or more contacts.
Demand Creation History	Demand Management		Shows the demand creation history by period and by various demand fields. Useful for exporting request data to Microsoft® Excel or other data analysis tools.
Historical SLA Violations	Demand Management		Shows the historical SLA violations period by various demand categories. Useful for exporting request data to Microsoft Excel or other data analysis tools.

<b>Report Name</b>	<b>Required License</b>	<b>Required Security Group</b>	<b>Description</b>
Request Detail	Demand Management		Audits the details of one or more requests. Includes header and detail information, notes, and status for each selected request.
Request Detail (Filter by Custom Fields)	Demand Management		Audits the details of one or more requests, which can be filtered by a request type's custom field values. Includes header and detail information, notes, and status for each selected request.
Request History	Demand Management		Audits the transaction history of one or more requests. Details the complete history of the request workflow and fields configured for auditing, showing every status change (date, time, user responsible) for every step traversed.
Request Quick View	Demand Management		Shows a quick summary of open and closed requests, categorized by priority. Also shows request activity for the current week and other selected information.
Request Summary	Demand Management		Categorizes and tallies requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.
Request Summary (Filter by Custom Fields)	Demand Management		Categorizes and tallies requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.
Satisfied Demand History	Demand Management		Shows satisfied demand history by period and by various demand fields. Useful for exporting request data to Microsoft Excel or other data

Report Name	Required License	Required Security Group	Description
			analysis tools.
<b>Deployment Management category</b>			
Compare Custom Database Setup	Deployment Management		Compares custom aspects of two databases (either SQL Server or Oracle®). With this report it is possible to compare actual data as well as object definitions.
Compare Filesystem Environments	Deployment Management		Compares the directory structure and files of two computer file systems. Reports either all files or differences only, as filtered by owner, permissions, content, file type, or directory name.
Compare MS SQL Server 7 Environments	Deployment Management		Compares the data model and database objects (tables, views, procedures, and triggers) of two Microsoft SQL Server 7 databases. Reports either all objects or differences only.
Compare Oracle Environments	Deployment Management		Compares the data model (tables, indexes, and so forth) and database objects (packages, views, triggers, and so forth) of two Oracle schemas. Reports either all objects or differences only.
Distribution Detail	Deployment Management		Shows the contents and results of a particular distribution of a release. Useful for a high-level view of a distribution and analyzing execution results.
Environment Comparison	Deployment Management		Compares the configuration details of multiple environments. Queries every main environment field and application specified, and

Report Name	Required License	Required Security Group	Description
			reports differences.
Environment Comparison by Objects Migrated	Deployment Management		Compares the migration history of multiple environments. Lists objects that were migrated into one specified environment but not the other, and can also flag objects migrated into both environments but at different times.
Environment Detail	Deployment Management		Shows the configuration details of one or more environments. Includes attributes of environment hosts, databases, and applications. Encrypted passwords are not displayed.
Environment Group Detail	Deployment Management	<p>One or more of the following security groups:</p> <ul style="list-style-type: none"> <li>• PFM - Finance Review Board</li> <li>• PFM - IT Steering Committee</li> <li>• PFM - Standards Committee</li> <li>• PPM 6.0 Upgrade Workbench Access</li> <li>• PPM Administrator</li> <li>• PPM All Access Grants</li> <li>• PPM Billing Manager</li> <li>• PPM Cost Manager</li> <li>• PPM Demand Management Administrator</li> <li>• PPM Demand Manager</li> <li>• PPM Deployment Management Administrator</li> <li>• PPM Program Manager</li> <li>• PPM Project Manager</li> </ul>	Shows the configuration details of one or more environment groups. Details the environments and applications encompassed by the group.

Report Name	Required License	Required Security Group	Description
		<ul style="list-style-type: none"> <li>• PPM Resource Manager</li> <li>• PPM Service Security Group</li> <li>• PPM Team Manager</li> <li>• PPM Time Administrator</li> <li>• PPM Time Manager</li> <li>• PPM User</li> <li>• PPM User Admin</li> </ul>	
Environments /Objects Detail	Deployment Management		Tracks migration activity in a specific environment. Lists objects that have been migrated to one or more specified environments, grouped by environment.
Object History	Deployment Management		Tracks the movement of specific types of objects through your processes. Lists all executions for a given object type and date range.
Objects /Environments Detail	Deployment Management		Tracks migration activity in a specific environment. Lists objects that have been migrated to one or more specified environments, grouped by object type.
Package Change History	Deployment Management		Audits the package changes and includes assignment information, line order, and line details for each selected package.
Package Details	Deployment Management		Audit the details of one or more packages. Includes header information, notes, and line details for each selected package.
Package History	Deployment Management		Audits the transaction history of one or more packages. Details the complete

Report Name	Required License	Required Security Group	Description
			workflow history for each package line, showing every status change (date, time, user responsible) for every step traversed.
Package Impact Analysis	Deployment Management		Analyzes the impact of a given package based on audit history. Lists information such as other packages containing the same objects, missing objects that were potentially relevant in previous packages, and so forth.
Packages Pending	Deployment Management		Generates a worklist of packages pending user action. Lists key details about open packages with pending activity, facilitating work prioritization, monitoring, and quick action decisions.
RCS Check In	Deployment Management		If you use PPM Center and RCS, checks a file into the RCS repository.
RCS Check Out	Deployment Management		If you use PPM Center and RCS, checks out a file from RCS repository.
Release Detail	Deployment Management	One or more of the following security groups: <ul style="list-style-type: none"> <li>• PFM - Finance Review Board</li> <li>• PFM - IT Steering Committee</li> <li>• PFM - Standards Committee</li> <li>• PPM 6.0 Upgrade: Workbench Access</li> <li>• PPM Administrator</li> <li>• PPM All Access Grants</li> <li>• PPM Billing Manager</li> </ul>	Shows the contents of a release. Lists all requests, packages, and distributions associated with a release.

Report Name	Required License	Required Security Group	Description
		<ul style="list-style-type: none"> <li>• PPM Cost Manager</li> <li>• PPM Demand Management Administrator</li> <li>• PPM Demand Manager</li> <li>• PPM Deployment Management Administrator</li> <li>• PPM Program Manager</li> <li>• PPM Project Manager</li> <li>• PPM Resource Manager</li> <li>• PPM Service Security Group</li> <li>• PPM Team Manager</li> <li>• PPM Time Administrator</li> <li>• PPM Time Manager</li> <li>• PPM User</li> <li>• PPM User Admin</li> </ul>	
Release Notes	Deployment Management		Audits all requests and packages contained in a release. Can be used to create a list of bugs fixed and patches applied within a specific release.
<b>Financial Management category</b>			
Project Cost Breakdown	Project Management		Shows the costs for the project and the activities with which the costs are associated. Labor and non-labor costs are included in the totals.  Also available for the Project Management category.
Project Cost Details	Project Management		Shows cost details for a project.  Also available for the Project Management category.
<b>Project Management category</b>			

Report Name	Required License	Required Security Group	Description
Baseline Comparison	Project Management		Compares the current schedule to a baseline or compares baselines.
Project Cost Breakdown			See " <a href="#">Project Cost Breakdown</a> " on the previous page in the Financial Management category.
Project Cost Details			See " <a href="#">Project Cost Details</a> " on the previous page in the Financial Management category.
<b>Resource Management category</b>			
Contact Synchronization			See " <a href="#">Contact Synchronization</a> " on page 4 in the Administrative category.
User Detail			See " <a href="#">User Detail</a> " on page 8 in the Administrative category.
Work Allocation Details	Time Management		Shows information about work allocations from Time Management.  Also available for the Time Management category.
<b>Time Management category</b>			
Actual Time Summary	Time Management		Shows actual time information by a variety of groupings and filters.
Delinquent Time Sheets	Time Management		Shows information about delinquent time sheets.
Time Sheet Details	Time Management		Shows detailed information for one or more time sheets. Includes work item information and time reported against each work item.
Time Sheet Summary	Time Management		Shows time sheet information by a variety of groupings and filters.



<b>Report Name</b>	<b>Required License</b>	<b>Required Security Group</b>	<b>Description</b>
Work Allocation Details			See <a href="#">"Work Allocation Details"</a> on the previous page in the Resource Management category.

## Chapter 2: HPE-Supplied Portlets

The following table lists the portlets provided as part of PPM Center. Availability depends on having the applicable access grants and products.

In the table, the subheadings are alphabetized categories, and the portlets are alphabetized within each category. The table indicates which portlets are available in two categories, and such portlets are described in more detail in the first of the two categories.

### Note:

- Portlets in the Project Overview category are not described in this document. Unlike portlets in other categories, portlets in the Project Overview category cannot be viewed on the Dashboard. They can be viewed only on the Project Overview page of a project. For information about them, see the *Project Management User's Guide*.
- For both portlets in PPM Center dashboard and Portlets in the Project Overview category, clicking **Export to Excel** exports portlet data to a Microsoft Excel file (not an HTML page), which enables you to process your data by using more Excel functions, such as format and calculation.

Portlet Name	Required Access Grant	Description
<b>[no category]</b>		
Resource Assignments	One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Resources</li> <li>• Edit only resources that I manage</li> <li>• View all resources</li> <li>• View my personal resource info only</li> </ul>	Shows the packages, requests, and tasks assigned to a set of users.
<b>ALM category (Availability requires installation of ALM software.)</b>		
ALM Category	Access restricted to members of the ALM - Release Manager security group	Lists recently deployed releases.

Portlet Name	Required Access Grant	Description
ALM - My Releases	Access restricted to members of the ALM - Release Manager security group	Lists release requests that have been created by or assigned to the logged-on user.
ALM - My RFCs	Access restricted to members of the ALM - Change Manager security group	Lists RFCs that have been created by or assigned to the logged-on user.
ALM - Open Releases	Access restricted to members of the ALM - Release Manager security group	Lists releases that do not have the status of <b>Closed</b> .
ALM - Open RFCs	Access restricted to members of the ALM - Change Manager security group	Lists RFCs that are currently being worked on.
ALM - Releases	None. HPE recommends that you configure this portlet to restrict access to members of the ALM - Release Manager security group.	Lists release requests. If PPM Center is integrated with HPE Change Control Management, the portlet provides a link for each request to log in to HPE Change Control Management, where various tabs provide information about the request.
ALM - Releases By Category	Access restricted to members of the ALM - Release Manager security group	Shows a pie chart with the percentage of releases in each category.
ALM - Releases By List	Access restricted to members of the ALM - Release Manager security group	Lists releases that meet the specified portlet preferences.
ALM - Releases By Type	Access restricted to members of the ALM - Release Manager security group	Shows a pie chart with the percentage of releases of each type.
ALM - RFCs By Category	Access restricted to members of the ALM - Change Manager security group	Shows a pie chart with the percentage of RFCs in each category.
ALM - RFCs By Reason for Change	Access restricted to members of the ALM - Change Manager security group	Shows a pie chart with the percentage of RFCs by each type of change being considered (for example, new feature, enhancement, or defect fix).
ALM - RFCs By Status	None. HPE recommends that you configure this portlet to restrict access to members of the ALM - Change Manager security group.	Shows a pie chart with the percentage of RFCs of each status.

Portlet Name	Required Access Grant	Description
ALM - RFCs By Status - List	Access restricted to members of the ALM - Change Manager security group	Lists RFCs that meet the specified portlet preferences.
ALM - RFCs per Release	Access restricted to members of the ALM - Release Manager security group	Lists the RFCs that constitute a release.
<b>Financial Management category</b>		
Capitalized Project Breakdown	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>View All Portfolios</li> <li>Edit All Portfolios</li> </ul>	Shows a list of projects that meet your filter criteria, with capitalized cost information. If you want this portlet to list the source data for any of the graphical Capitalized Project Timelines, Impairment Risks, or Total Exposure portlets, use the same filter criteria in this portlet and those.  Also available for the Portfolio Management category.
Capitalized Project Timelines	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>View All Portfolios</li> <li>Edit All Portfolios</li> </ul>	Shows a Gantt chart for projects with capitalized costs, with start date, end date, and health of each project.  Also available for the Portfolio Management category.
Financial Comparison	One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>View Costs on All Financial Summaries</li> <li>Edit Costs on All Financial Summaries</li> </ul>	Shows a bar chart that compares the forecast or Plan of Record (POR) of one or more lifecycle entities to the forecast or actuals of the same or different set of lifecycle entities.
Financial Summary to Financial Data Comparison	One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>View Costs on All Financial Summaries</li> <li>Edit Costs on All Financial Summaries</li> </ul>	Shows a bar chart that compares the forecast or actuals of one or more lifecycle entities to financial data tables.
Impairment Risks	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>View All Portfolios</li> <li>Edit All Portfolios</li> </ul>	Shows a pie chart of active projects that have capitalized costs, chosen by project health and sorted by project.  Also available for the Portfolio Management

Portlet Name	Required Access Grant	Description
		category.
Program Cost Summary	One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit Work Plan Cost Data</li> <li>View Project, Program, and Time Sheet Cost Data</li> </ul>	Shows a program's planned labor, non-labor, and total costs and corresponding actuals.  Also available for the Program Management category.
Project Cost Summary	One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit Work Plan Cost Data</li> <li>View Project, Program, and Time Sheet Cost Data</li> </ul>	Shows a project's planned labor, non-labor, and total costs and corresponding actuals, as well as earned value data.
Project Current Cost Metrics	One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit Work Plan Cost Data</li> <li>View Project, Program, and Time Sheet Cost Data</li> </ul>	Analyzes current cost metrics for projects.
Total Exposure	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>View All Portfolios</li> <li>Edit All Portfolios</li> </ul>	Shows a pie chart of active projects that have capitalized costs, grouped by the health of the project.  Also available for the Portfolio Management category.
<b>Packages category</b>		
My Packages	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows all packages created by, or assigned to, the current user. Provides the ability to drill down on any package to view its details, such as the workflow status and package lines.
Package Activity	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows activity information about the number of deployments (package line execution step transactions) completed during the last three weeks. Provides the ability to drill down to any object type or environment to view the included packages.

Portlet Name	Required Access Grant	Description
Package List	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows general information about PPM Center packages, such as their description and status.
Package References	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows the references that are attached to the package based on filters such as reference types, relationship, and the time period when they were added.
Package Summary Bar Chart	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows a bar chart summary of packages.
Package Summary Pie Chart	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows a pie chart summary of packages.
Pending Deployment	One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Packages</li> <li>Edit Packages</li> <li>View Packages</li> </ul>	Shows general information about packages that have not been deployed and provides visibility into scheduled or required package migration.
<b>Portfolio Management category</b>		
Budget by Asset Class	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario</li> </ul>	Shows a bar chart of the breakdown of budget by asset class for a what-if scenario from an existing scenario comparison.

Portlet Name	Required Access Grant	Description
	Comparisons <ul style="list-style-type: none"> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	
Budget by Business Objective	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario Comparisons</li> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	Shows a bar chart of the breakdown of budget by business objective for a what-if scenario from an existing scenario comparison.
Budget by Project Class	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario Comparisons</li> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	Shows a bar chart of the breakdown of budget by project class for a what-if scenario from an existing scenario comparison.
Budget Summary	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario Comparisons</li> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	Shows a stacked bar chart of operating expenses and capital expenses for a what-if scenario from an existing scenario comparison.
Capitalized Project Breakdown		See <a href="#">Capitalized Project Breakdown</a> in the Financial Management category.
Capitalized Project Timelines		See <a href="#">Capitalized Project Timelines</a> in the Financial Management category.
Cost Benefit Analysis	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario Comparisons</li> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	Shows a bar chart of cost/benefit analysis for a what-if scenario from an existing scenario comparison.
Current Portfolio Map	One or more of the following Portfolio Mgmt: access grants:	For the current portfolio of all proposals, projects, and assets, shows a bubble chart that is highly configurable in terms of the

Portlet Name	Required Access Grant	Description
	<ul style="list-style-type: none"> <li>View All Portfolios</li> <li>Edit All Portfolios</li> </ul>	metrics represented by the horizontal and vertical axes and by the sizes and colors of the bubbles.
Impairment Risks		See " <a href="#">Impairment Risks</a> " on page 20 in the Financial Management category.
Portfolio by Category	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>View All Portfolios</li> <li>Edit All Portfolios</li> </ul>	Shows a bar chart of monetary metrics for the proposals, projects and assets in the current portfolio, ordered by a selected category.
Total Budget	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario Comparisons</li> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	Shows a line graph, per period, of the budget requirement and availability for all the what-if scenarios from an existing scenario comparison.
Total Exposure		See " <a href="#">Total Exposure</a> " on page 21 in the Financial Management category.
Total Resource	One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Scenario Comparisons</li> <li>Edit Scenario Comparison</li> <li>View Scenario Comparison</li> </ul>	Shows a line graph, per period, of the resource requirement and availability for all the what-if scenarios from an existing scenario comparison.
<b>Program Management category</b>		
Issue List	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Lists the open issues for a program.  Also available for the Requests category.
Program Contents List	One or more of the following PMO: access grants: <ul style="list-style-type: none"> <li>Edit All Programs</li> <li>Edit Programs</li> <li>View Programs</li> </ul>	Shows proposals, projects, and assets within a specified program.  Also available for the Project Management category.



Portlet Name	Required Access Grant	Description
Program Cost Summary		See <a href="#">Program Cost Summary</a> in the Financial Management category.
Program List	One or more of the following PMO: access grants: <ul style="list-style-type: none"> <li>Edit All Programs</li> <li>Edit Programs</li> <li>View Programs</li> </ul>	Displays the programs and their summary conditions.
Program Risk List	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows open risks associated with a program. Also available for the Requests category.
Program Scope Change List	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows open scope change requests associated with a program. Also available for the Requests category.
<b>Project Management category</b>		
My Tasks	One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Projects</li> <li>Edit Projects</li> <li>Update Tasks</li> <li>View Projects</li> </ul>	Shows all of the project tasks assigned to the user that have status of Ready or In Progress and a scheduled start date within two weeks of the current date. Also available for the Time Management category.
Program Contents List		See <a href="#">Program Contents List</a> in the Program Management category.
Project Gantt	One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Projects</li> <li>Edit Projects</li> <li>Update Tasks</li> <li>View Projects</li> </ul>	Shows a Gantt chart of projects, tasks, and milestones and can be configured based on such criteria as project and task states, and schedule. Provides the ability to drill down into project and task details.
Project Health	One or more of the following	Shows a pie chart summary of projects by

Portlet Name	Required Access Grant	Description
Pie Chart	Project Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Projects</li> <li>• Edit Projects</li> <li>• Update Tasks</li> <li>• View Projects</li> </ul>	health.
Project List	One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Projects</li> <li>• Edit Projects</li> <li>• Update Tasks</li> <li>• View Projects</li> </ul>	Shows general information about PPM Center projects, such as how close they are to completion and their scheduled finish date.
Project Timelines	One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Projects</li> <li>• Edit Projects</li> <li>• Update Tasks</li> <li>• View Projects</li> </ul>	Shows an overview of the timelines for a set of projects.
Resource Gantt	One or more of the following access grants: <ul style="list-style-type: none"> <li>• Demand Mgmt:               <ul style="list-style-type: none"> <li>◦ Edit All Requests</li> <li>◦ Edit Requests</li> <li>◦ View Requests</li> </ul> </li> <li>• Project Mgmt:               <ul style="list-style-type: none"> <li>◦ Edit All Projects</li> <li>◦ Edit Projects</li> <li>◦ Update Tasks</li> <li>◦ View Projects</li> </ul> </li> <li>• Resource Mgmt:               <ul style="list-style-type: none"> <li>◦ Edit All Resources</li> <li>◦ Edit only resources that I manage</li> <li>◦ Edit Staffing Profiles</li> </ul> </li> </ul>	Shows a Gantt chart reflecting the work items (including requests, tasks, milestones, and staffing profiles) assigned to selected resources. Provides the ability to drill down into work item details.

Portlet Name	Required Access Grant	Description
	<ul style="list-style-type: none"> <li>○ View all resources</li> <li>○ View my personal resource info only</li> </ul>	
Summary Task List	One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Projects</li> <li>● Edit Projects</li> <li>● Update Tasks</li> <li>● View Projects</li> </ul>	Displays general information about summary tasks, such as how close they are to completion and their scheduled finish date.
<b>Requests category</b>		
Assignment Queue	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul>	Provides quick assignment capabilities from the PPM Dashboard for demand managers.
Consolidated Demand	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul>	Shows the demand placed on the user's organization.
Demand by Category	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul>	Shows the demand placed on an organization that can be grouped by common demand categories.
Demand List	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul>	Provides a personalizable list of the demand placed on an organization or individual.
Issue List		See <a href="#">Issue List</a> in the Program Management category.

Portlet Name	Required Access Grant	Description
My Requests	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows all requests created by or assigned to the current user and provides a critical view into the most pressing requests and approaching deadlines.
Open Requests by Priority	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows the number of requests currently open, grouped by priority.
Program Risk List		See <a href="#">Program Risk List</a> in the Program Management category.
Program Scope Change List		See <a href="#">Program Scope Change List</a> in the Program Management category.
Request Activity	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows general activity information about PPM Center requests, such as the number of requests opened and closed during the last two weeks, and the number of open requests.
Request List	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows general information about PPM Center requests, such as their description and status.
Request References	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows the references that are attached to the request based on filters such as Reference Types, Relationship, and the time period when they were added.
Request Summary	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> </ul>	Shows information about groups of PPM Center requests, such as their priority, type, status, and the total number of requests for each category. Provides the ability to drill down to detailed requests.

Portlet Name	Required Access Grant	Description
	<ul style="list-style-type: none"> <li>View Requests</li> </ul>	
Request Summary Bar Chart	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows a bar chart that summarizes requests.
Request Summary Pie Chart	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows a pie chart that summarizes requests.
SLA Exception Roll Up	One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Requests</li> <li>Edit Requests</li> <li>View Requests</li> </ul>	Shows the open requests that have triggered SLA exceptions.
<b>Resource Management category</b>		
Analyze Assignment Load	One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Resources</li> <li>Edit only resources that I manage</li> <li>View all resources</li> <li>View my personal resource info only</li> </ul>	Compares the workload for a group of resources against their capacity on the resources' calendars.
Analyze Resource Pools	One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>Edit All Resource Pools</li> <li>Edit Resource Pools</li> <li>View All Resource Pools</li> <li>View Resource Pools</li> </ul>	Compares the anticipated demand for resources (from the staffing profiles) against the projected capacity of those resources (from a resource pool).

Portlet Name	Required Access Grant	Description
Resource Pool List	One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Resource Pools</li> <li>• Edit Resource Pools</li> <li>• View All Resource Pools</li> <li>• View Resource Pools</li> </ul>	Shows the list of resource pools.
Resource Request Portlet		Shows the list of staffing profile positions to be fulfilled by a resource pool manager.
Staffing Profile List	One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Staffing Profiles</li> <li>• Edit Staffing Profiles</li> <li>• View All Staffing Profiles</li> <li>• View Staffing Profiles</li> </ul>	Shows the list of staffing profiles.
<b>Time Management category</b>		
Approve Time Sheets	Time Mgmt: Approve Time Sheets	Shows all the time sheets that have time sheet lines you can approve.
My Tasks		See <a href="#">My Tasks</a> in the Project Management category.
My Time Sheets	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	Shows your time sheets that cover the number of time periods you specify.
My Work Items	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> </ul>	Lists all the work items on the user's open time sheets, providing a snapshot of what the user has been working on and to what he has been charging time.

Portlet Name	Required Access Grant	Description
	<ul style="list-style-type: none"> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	
Time Sheet Totals by Resource	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	Shows the time charged by a set of resources, displaying the level of activity (by time) in the current and previous time periods for those users.
Time Sheet Totals by Resource Group	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	Shows the time charged by resource groups, summarizing the totals of all the resources in those groups, and displaying the level of activity (by time) in the current and previous time periods for those groups.
Time Sheet Totals by Work Item	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets</li> </ul>	Shows detailed information on the time allocated to and the time charged for specific work items. Should not be used to display information for all work items but for a specific set based on filter criteria.

Portlet Name	Required Access Grant	Description
	(Summary Info Only) <ul style="list-style-type: none"> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	
Time Sheet Totals by Work Item, Resource Group	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	Shows the time charged by resource groups, summarizing the totals of all the resources in those groups, and splitting the data by each specific work item.
Time Sheet Totals for Direct Reports	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	Shows the total time entered by all the direct reports for a manager or set of managers you specify.
Work Allocation Details	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"> <li>• Approve Time Sheets</li> <li>• Close Time Sheets</li> <li>• Edit Time Sheet Policies</li> <li>• Edit Time Sheets</li> <li>• View All Time Sheets (Summary Info Only)</li> <li>• View Time Sheet Policies</li> <li>• View Time Sheets</li> </ul>	Shows summary information on the work allocations defined in the system. Especially useful to determine which allocations are nearly used up or actually over budget.



Portlet Name	Required Access Grant	Description
Work Item Set Actuals vs. Allocations	One or more of the following Time Mgmt: access grants: <ul style="list-style-type: none"><li>• Approve Time Sheets</li><li>• Close Time Sheets</li><li>• Edit Time Sheet Policies</li><li>• Edit Time Sheets</li><li>• View All Time Sheets (Summary Info Only)</li><li>• View Time Sheet Policies</li><li>• View Time Sheets</li></ul>	Shows summary information at the Work Item Set level. Provides a snapshot of which projects or types of work you are spending the most time on, as well as where you have budgeted the most time.

## Chapter 3: HPE-Supplied Request Types

The following table lists the request types provided as part of PPM Center. Availability depends on having the applicable licenses and products.

In the table, the subheadings are alphabetized categories, and the request types are alphabetized within each category. The table indicates which request types are available in two categories, and such request types are described in more detail in the first of the two categories.

**Note:** To edit any request type, you must have the Demand Mgmt: Edit Request Types access grant.

Request Type Name	Description
<b>Application Lifecycle Management-related (Availability requires installation of ALM software.)</b>	
ALM - Defect Template with Quality Center Integration	Request used by ALM in conjunction with the ALM - Defect Template with Quality Center Integration workflow to implement integration between PPM Center and HPE Quality Center.
ALM - Release Management	Request used by ALM in conjunction with the ALM - Release Request workflow to address releases in a manner consistent with the ITIL Release Management process.
ALM - Request For Change (RFC)	Request used by ALM in conjunction with the ALM - Request For Change workflow to address requests in a manner consistent with the ITIL Change Management process.
<b>Best Practices category</b>	
DEM - Application Bug	Request for reporting problems in current IT applications.
DEM - Application Enhancement	Request for new functionality in current IT applications.
DEM - Database Refresh	Request for refreshing the database for all IT operations applications in the testing phase. Standard IT operations service levels apply.
DEM - Initiative	Request for key projects for future quarters.
PFM - Asset	Request to create an asset, such as a production application, resulting from completion of a project in the current portfolio.  Also available for the Portfolio Management category.

Request Type Name	Description
PFM - Project	Request to start an approved project (after its approval as a proposal) in the current portfolio.  Also available for the Portfolio Management category.
PFM - Proposal	Request to propose a new project to be approved and added to the portfolio.  Also available for the Portfolio Management category.
Program Details	Request to create a program in the current portfolio.  Also available for the Portfolio Management category.
Program Issue	Request for logging program issues.
Program Risk	Request for logging program risks.
Project Issue	Request for logging a project issue.
Project Risk	Request for adding project risk information.
Project Scope Change Request	Request for a project scope change.
<b>Foundation category</b>	
Bug	Request for logging a bug.
Enhancement	Request for an enhancement.
Generic Request	Request for general purpose request tracking.
Project Details	Request for adding project details.
<b>Portfolio Management category</b>	
PFM - Asset	See " <a href="#">PFM - Asset</a> " on the previous page in the Best Practices category.
PFM - Project	See " <a href="#">PFM - Project</a> " above in the Best Practices category.
PFM - Proposal	See " <a href="#">PFM - Proposal</a> " above in the Best Practices category.
Program Details	See " <a href="#">Program Details</a> " above in the Best Practices category.

## Chapter 4: HPE-Supplied Workflows

The following table lists the workflows provided as part of PPM Center. Availability depends on having the applicable licenses and products.

In the table, the subheadings are alphabetized categories, and the workflows are alphabetized within each category. The table indicates which workflows are available in two categories.

**Note:** To edit any workflow, you must have the Config: Edit Workflows access grant.

Workflow Name	Description
<b>Application Lifecycle Management-related (Availability requires installation of ALM software. Subworkflows are not listed.)</b>	
ALM - Change Migration	Workflow to migrate changes from the DEV environment to the TEST environment and from the TEST environment to the LIVE environment.
ALM - Defect Template with Quality Center Integration	Workflow that includes execution steps to create a defect or requirement in Quality Center when PPM Center and Quality Center are integrated.
ALM - Release Distribution	Workflow used to control distribution among environments of a release that consolidated multiple changes.
ALM - Release Request	Workflow used to control the sequence of approvals, decisions, and actions that a release request follows over its lifecycle, including initial planning, creation of the release, aggregation of the packages for the requests for change (RFCs) into the release, and automated deployment of all the packages into TEST and LIVE environments.
ALM - Request For Change	Workflow used to control the sequence of approvals, decisions, and actions by which an RFC is processed over its lifecycle.
<b>Best Practices category</b>	
DEM - Bug Request	Workflow to enable mature bug fix process.
DEM - Database Refresh	Workflow to refresh development or QA databases.

<b>Workflow Name</b>	<b>Description</b>
DEM - Enhancement Request Process	Workflow to request mature enhancement process.
DEM - Project Initiative Process	Workflow to initiate approval for an IT project.
Issue Management Process	Workflow for managing issues.
PFM - Asset	Workflow for asset. Also available for the Portfolio Management category.
PFM - Project	Workflow for project. Also available for the Portfolio Management category.
PFM - Proposal	Workflow for proposal. Also available for the Portfolio Management category.
Program Process	Workflow for program. Also available for the Portfolio Management category.
Program Risk Management Process	Workflow for program risk management.
Risk Management Process	Workflow for project risk management.
Scope Change Request Process	Workflow for scoping change requests.
<b>Foundation category</b>	
Bug Request Type	Workflow for bug fix request type.
Dev -> Test -> Multiple Prods	Workflow for migrating code from development to multiple production environments.
Dev -> Test -> Prod	Workflow for migrating code from development through production.

<b>Workflow Name</b>	<b>Description</b>
Project Process	Workflow for project management.
<b>Portfolio Management category</b>	
PFM - Asset	Workflow for asset. Also available for the Best Practices category.
PFM - Project	Workflow for project. Also available for the Best Practices category.
PFM - Proposal	Workflow for proposal. Also available for the Best Practices category.
Program Process	Workflow for program. Also available for the Best Practices category.

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**Feedback on HPE-Supplied Entities Guide (Project and Portfolio Management Center 9.40)**

Just add your feedback to the email and click send.

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We appreciate your feedback!