Project and Portfolio Management Center

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Program Management Configuration Guide

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Chapter 1: Getting Started with Program Management Configuration

Overview of Program Management

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

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

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

Program managers can:

- Oversee the milestones and deliverables of all IT projects
- Identify and mitigate risk
- Manage scope changes
- Resolve inter-project issues

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

Program-Related Request Types

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

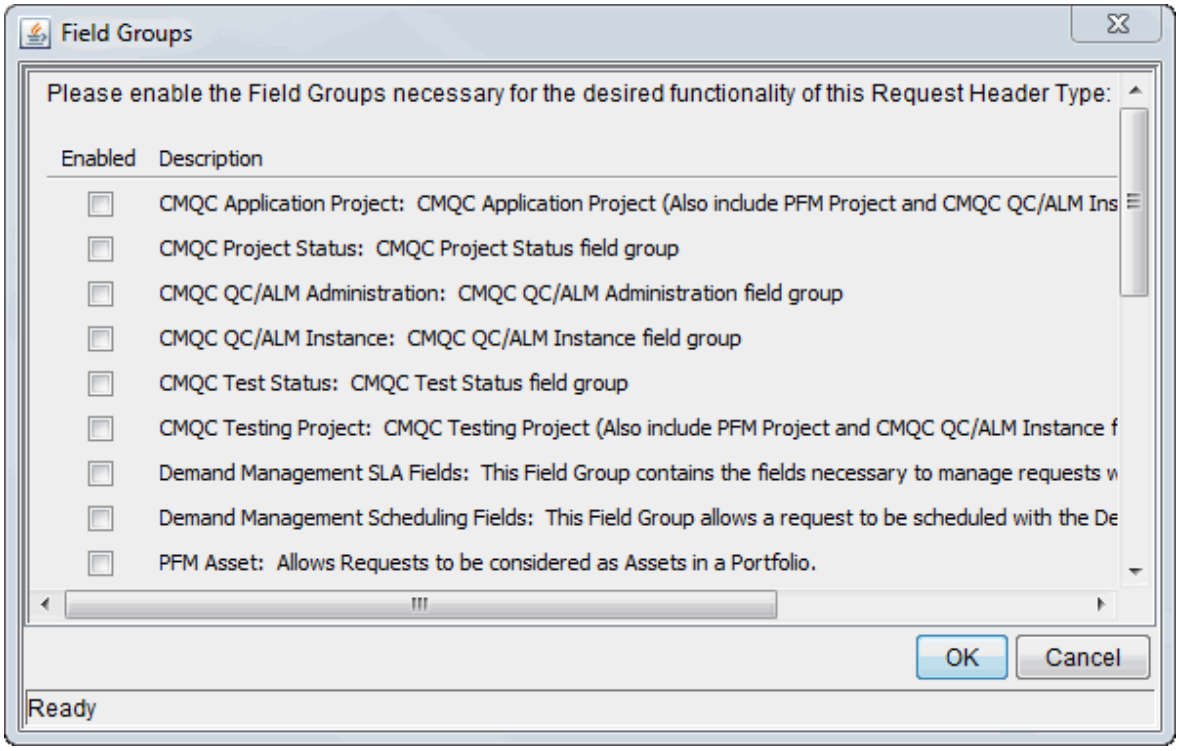
Program Management includes the following request types, all of which affect programs:

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

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

"Figure 1-1. Field Groups window" on the next page shows the Field Groups window, which you use to select the Program Management field groups to associate them with a request header type. "Configuring Program Management Request Types and Workflows" on page 12 provides details on how to select the field groups.

Figure 1-1. Field Groups window



Each Program Management request type must be linked to its corresponding field group and to a specific Program Management workflow. Likewise, each Program Management workflow must be linked to a specific Program Management request type.

Table 1-1. Program Management field groups

Field Group	Description
PFM Program	Required for any request type that will represent a program lifecycle (regardless of whether the program will be considered in the portfolio).
Program Issue	Allows requests to be considered as issues in a program.
Program Reference	Contains a field that allows a user to add a program reference to a request.
Program Risk	Allows requests to be considered as risks in a program.

Overview of Program Management Configuration

This section presents information about the high-level steps involved in configuring Program Management for your organization. "Configuring Program Management Request Types and

Workflows" on page 12 and "Configuring Security for Program Management" on page 31 contain the detailed procedures you use to perform these steps.

Step One: Gather Information

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

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

- **Field name.** Field names help ensure that the information captured in a request is correct and sufficient. Use the Request Type Workbench to set up a request so that it contains the fields required to gather the required information.
- **Information type.** What type of information do you need? Should the value of the field be entered as text, or will users select a value from a list? The field information type is governed by its validation, which defines the field component type, as well as what information users can enter in the field. For example, a field using a numeric text field validation accepts only numeric values.
- **Field behavior.** Configuring the behavior of a field helps to ensure that the correct information is collected. For example, to ensure that requests include specific information, you can make a field required.

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

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

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

Table 1-2. Program Management request types and workflows

Request Type	Workflow	Definition
Program Details	Program Process	A request type used to enter basic set of detailed program information.
Program Issue	Issue Management Process	A request type used to enter issues directly against a program.
Project Issue	Issue Management	A request type used to enter issues into a project

Table 1-2. Program Management request types and workflows, continued

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

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

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

Step Two: Configure Program Management Request Types

After you gather program requirements, configure the request header types associated with existing request types to include the required Program Management field group. For details, see "Configuring Program Management Request Types and Workflows" on page 12.

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

Step Three: Configure Program Management Workflows

Configure the request header types associated with workflows to include the required Program Management field group. For details, see "Configuring Program Management Workflows" on page 17.

Step Four: Add Custom User Data Fields to Program Pages

You can define custom fields to capture additional information that standard fields on the View Program and Modify Program pages in the PPM Dashboard do not capture. For information on how to create custom user data fields, see "Configuring User Data" on page 19.

Step Five: Set Security for Program Management

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

- Select program managers and set up security access grants for these resources
- Determine who is to report on issues, risks, and scope changes, reporter and set up security access grants for these resources
- Limit the data displayed in some fields or windows
- Specify who can view, create, edit, or process PPM Center entities such as requests, packages, projects, portfolios, and programs
- Specify who can view, create, or edit PPM Center configuration entities such as workflows, request types, object types, and security groups
- Specify who can change security settings

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

The steps you perform to configure security groups and users for Program Management are described in "Configuring Security for Program Management" on page 31.

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

Related Documents

For additional useful information, see the following documents:

- *Program Management User's Guide*
- *Commands, Tokens, and Validations Guide and Reference*
- *Security Model Guide and Reference*
- *Demand Management Configuration Guide*
- *Deployment Management Configuration Guide*
- *HPE-Supplied Entities Guide* (includes descriptions of all PPM Center portlets, request types, and workflows)

Chapter 2: Configuring Program Management Request Types and Workflows

Configuring Program Management Request Types

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

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

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

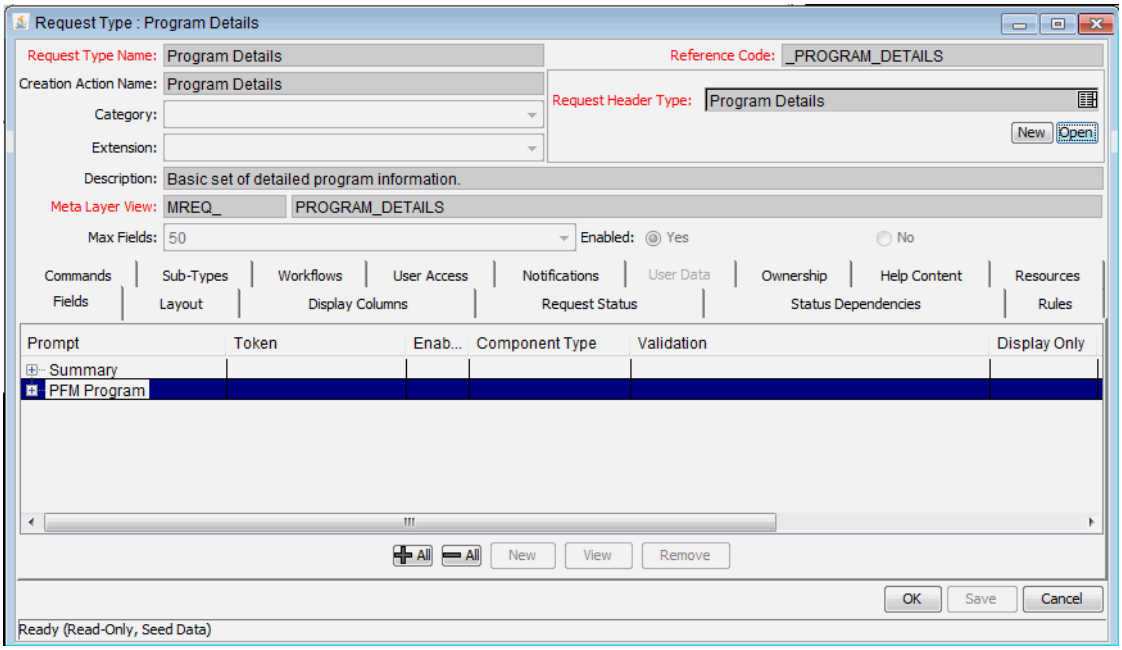
To configure a request type for Program Management:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench.** The PPM Workbench opens.
3. From the shortcut bar, select **Demand Mgmt > Request Types.** The Request Type Workbench opens.
4. Click **List.** The **Results** tab lists all existing request types.
5. Open an existing request type or create a new request type.

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

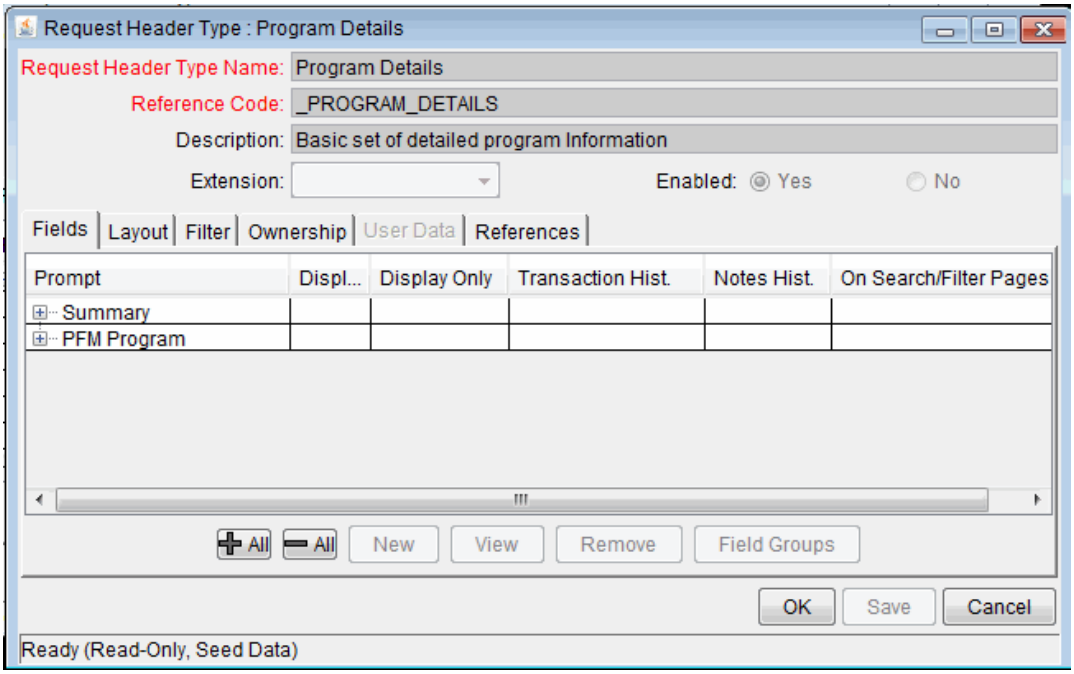
> *Configuration Guide.*

The Request Type: <*Request Type Name*> window opens.



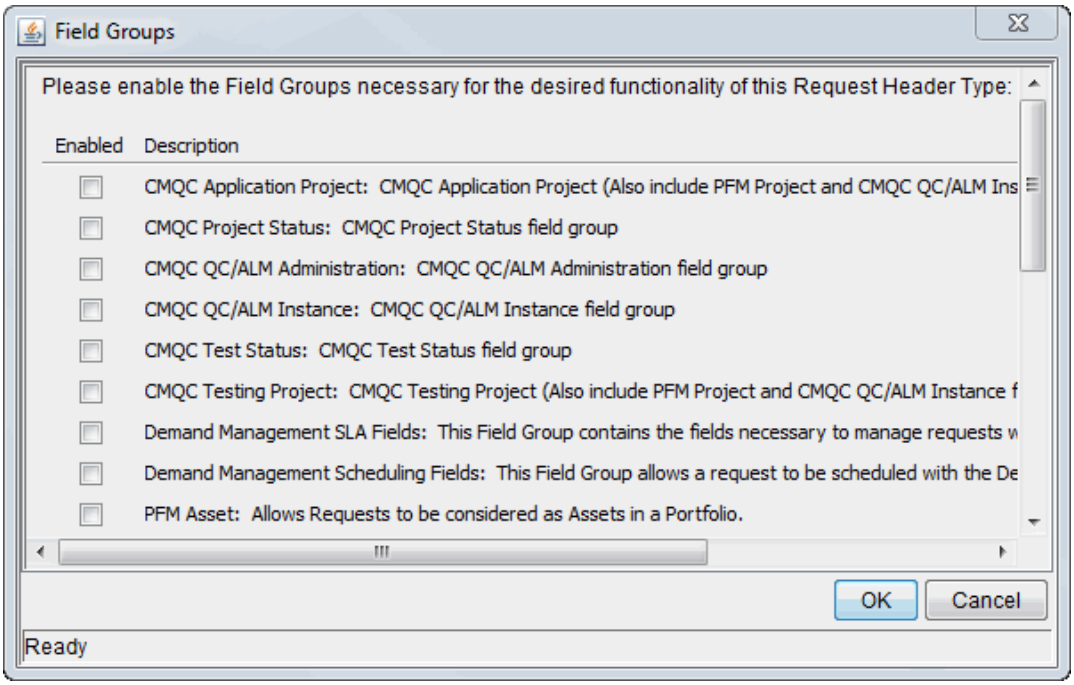
6. Add a field group to the request header type.
   a. In the top right of the Request Type window, under the **Request Header Type** box, click **Open.**

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



b. Click **Field Groups.**

The Field Groups window opens.



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

> **Note:**
>
> - Selecting the PFM Program field group allows requests to be treated as programs in the Portfolio Management process.
> - Selecting the Program Risk field group allows requests to be considered as risks in a program.
> - Selecting the Program Issue field group allows requests to be treated as issues in a program.
> - Selecting the Program Reference field group adds a field to the request type so that users can add a program reference to requests.

d. Click **OK.**

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

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

The Request Type window opens.

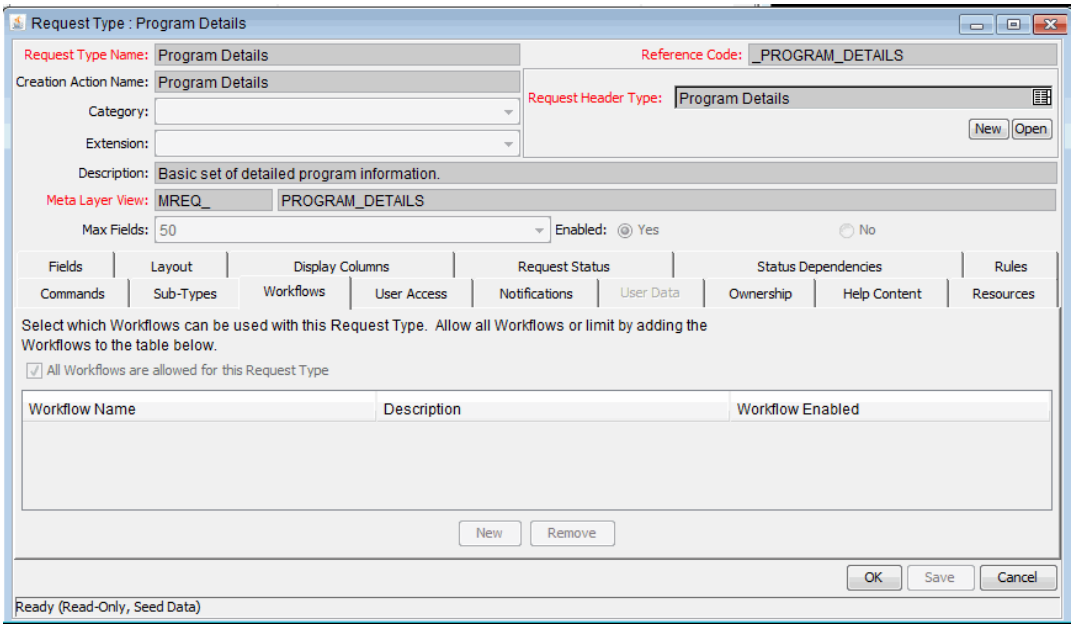
> **Note:** For a list of Program Management request types and the field groups associated with them, see "Table 1-1. Program Management field groups" on page 7.

7. To save the changes to the request type, click **Save.**
8. Add a workflow to the request type:

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

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

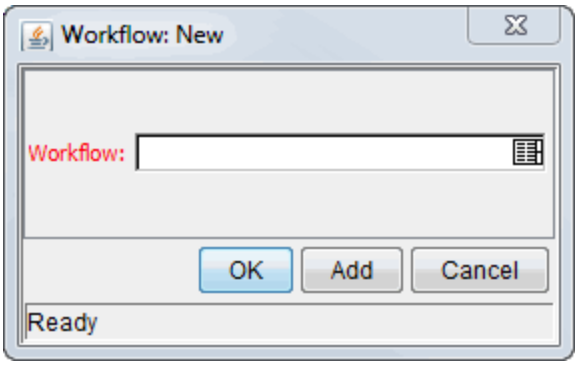
By default, the **All Workflows are allowed for this Request Type** checkbox is selected.



b. Clear the **All Workflows are allowed for this Request Type** checkbox.

c. Click **New.**

The Workflow: New dialog box opens.



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

e. Click **OK.**

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

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

9. Click **OK.**

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

Configuring Program Management Workflows

"Configuring Program Management Request Types " on page 12 provided information on how to add a specific workflow to a specific Program Management request type. This section contains information on how to add a specific Program Management request type to a workflow. For information about workflows and workflow steps assigned to requests, see the *Demand Management User's Guide.*

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

To add a request type to a workflow:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench.** The PPM Workbench opens.
3. From the shortcut bar, select **Configuration > Workflows.** The Workflow Workbench opens.
4. In the lower-right corner, click **List.** The Workflow Workbench lists all workflow records.
5. In the **Workflow Name** column, double-click the record for the workflow that you added to the request type in step 8.

   The Workflow: <*Workflow Name*> window opens.
6. Click the **Request Types** tab.
7. In the **Allowed Request Types** list, select all of the request types except the Program Management request type that you modified in "Configuring Program Management Request Types " on page 12.

   > **Tip:** To select adjacent and nonadjacent list items, use the `Shift` and `Ctrl` keys, respectively.
8. To move the selected request types to the **Restricted Request Types** list, click the left-pointing arrow.
9. Click **OK.**

Configuring Background Services for Program Management

The following background services pertain to Program Management:

Service	Description	Default Value
Financial Summary Rollup Service	Calculates rollups of financial information, including forecast and actual costs and benefits (monthly data) and approved budgets (annual data), for the following: • Rollups from proposals, projects, and assets to a program • Rollups from proposals, projects, assets, programs, and subportfolios to a portfolio, along with immediate rollups to all the successively higher levels in the portfolio hierarchy	Status: Enabled Scheduled Type: Simple Schedule: 3 hours
Program Health Service	Program overall health is calculated based on issue health, risk health, and scope change health. The Program Health Service updates program health automatically.	Status: Enabled Schedule Type: Simple Schedule: 5 minutes

To modify the service, do the following:

1. From the menu bar in the standard interface, select **Open > Administration > Schedule Services**.
2. Click the service you want to modify.
3. Edit the Status, Schedule Type, and Schedule. See the online help for more information about the Schedule Type.
4. Click **Save**.

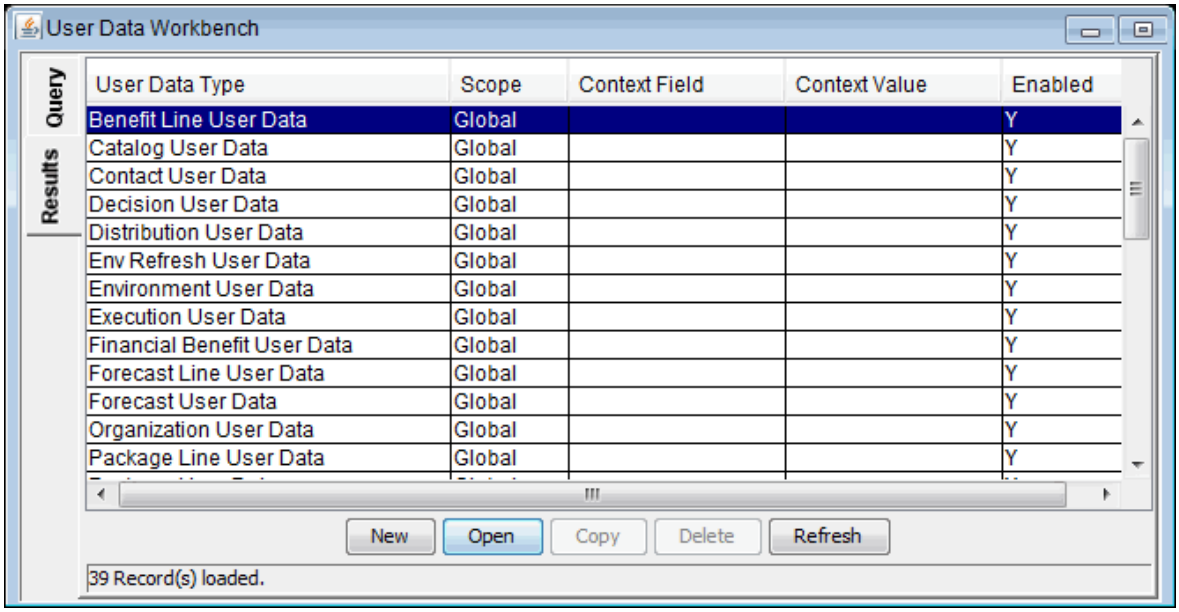
Chapter 3: Configuring User Data

Overview of User Data

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

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

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



Each user data type consists of the following components:

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

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

- The **Scope** column indicates the scope of the user data type field. The scope value is either global or context. If the scope is global, the **User Data** tab for every designated entity contains the defined field. If the scope value is context (a context-sensitive user data type field), the defined user data field is displayed only on the **User Data** tab of entities with specific context fields and context value definitions. The scope of the Program User Data user data type is global.
- The **Context Field** column displays the label of context-sensitive fields. It is not enabled for the Program User Data type.
- The **Context Value** column lists the value (context) for context-sensitive fields. It is not enabled for the Program User Data type.

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

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

Referring to User Data

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

Adding Custom User Fields to Programs

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

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

Program page.

To add a custom user field to program pages:

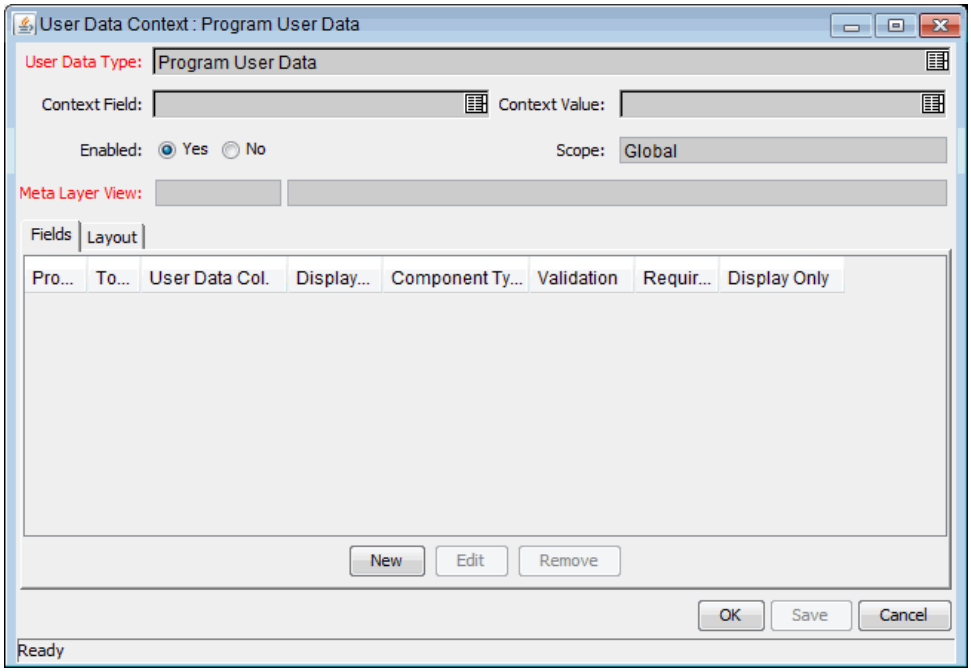
1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Open Workbench.**

   The PPM Workbench opens.
3. From the shortcut bar, select **Configuration > User Data.**

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

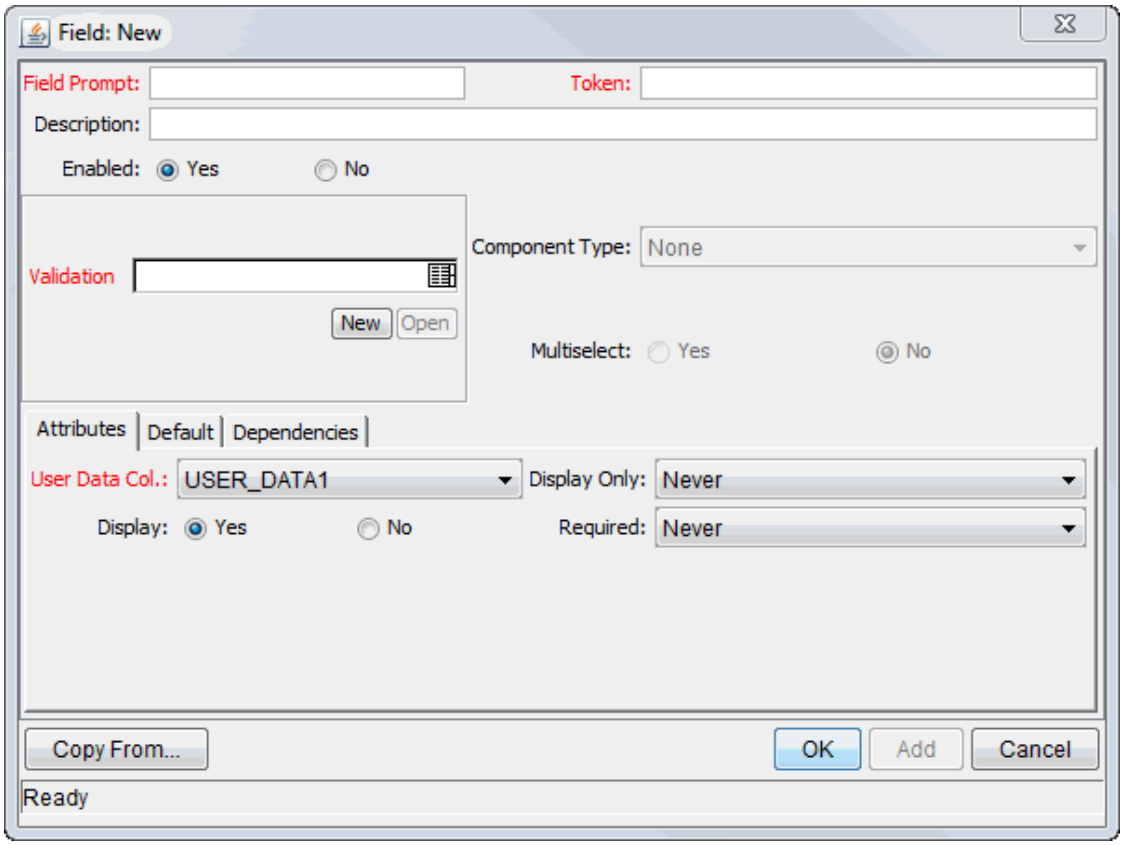
   The **Results** tab lists the available user data types.
5. In the **User Data Type** column, double-click **Program User Data.**

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



6. Click **New.**

   The Field: New window opens to the **Attributes** tab.



7. Enter the following information:

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

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

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

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

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

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

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

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

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

these, select **Multiselect.**

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

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

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

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

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

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

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

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

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

9. Do one of the following:

   - Continue to configure the new field.

     For information on how to further configure the new field, see "Configuring the Default Value for a Custom User Field" on the next page and "Configuring Default Security for a Custom User Field" on page 26.

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

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

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

Configuring the Default Value for a Custom User Field

To configure the default value for a custom user field:

1. If the Field: <*Field Name*> window is open, skip to step 8, otherwise, continue to step 2.
2. Log on to PPM Center.
3. From the menu bar, select **Open > Administration > Open Workbench.**

   The PPM Workbench opens.
4. From the shortcut bar, select **Configuration > User Data.**

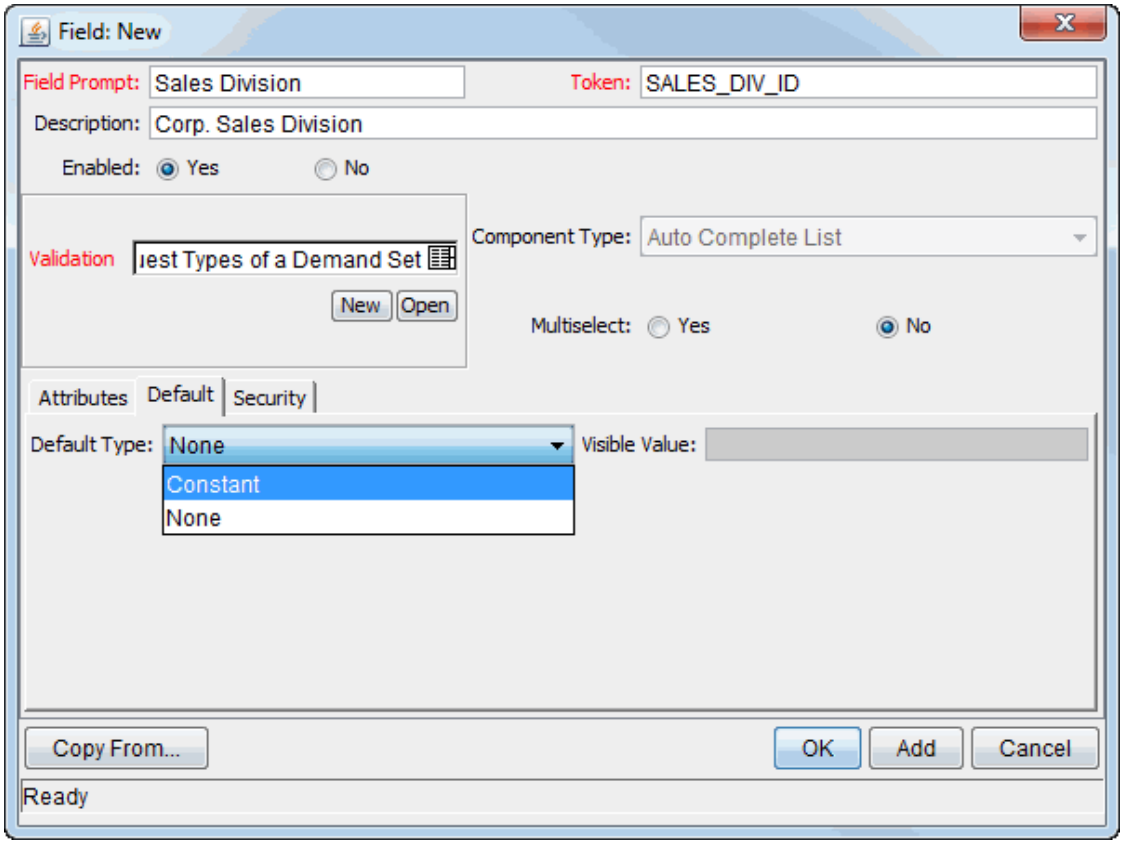
   The User Data Workbench opens.
5. Click **List.**

   The **Results** tab lists the available user data types.
6. In the **User Data Type** column, double-click **Program User Data.**

   The User Data Context: Program User Data window opens to the **Fields** tab.
7. On the **Fields** tab, double-click the row that displays the field for which you want to configure a default value(s).

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

8. Click the **Default** tab.



9. Enter the following information:

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

      - To specify that the field default is to be a constant value, select **Constant.**
      - To specify that the field default is to have no default, select **None.**

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

10. Do one of the following:

    - Continue to configure the new custom field.
    - To save the custom field and close the Field window, click **OK,** and then, in the User Data Context window, click **OK.**

Configuring Default Security for a Custom User Field

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

To configure the default security settings for a customer user field:

1. If the Field window is open, skip to step 8, otherwise, continue to step 2.
2. Log on to PPM Center.
3. From the menu bar, select **Open > Administration > Open Workbench.**

   The PPM Workbench opens.
4. From the shortcut bar, select **Configuration > User Data.**

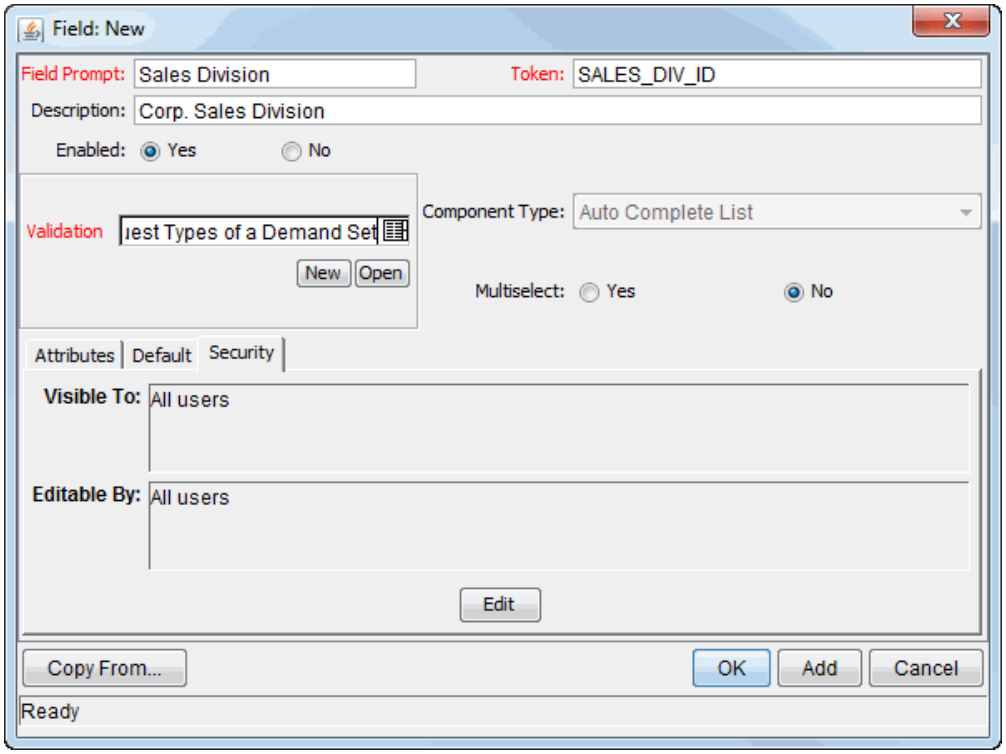
   The User Data Workbench opens.
5. Click **List.**

   The **Results** tab lists the available user data types.
6. In the **User Data Type** column, double-click **Program User Data.**

   The User Data Context: Program User Data window opens to the **Fields** tab.
7. On the **Fields** tab, double-click the row that displays the field for which you want to configure default security settings.

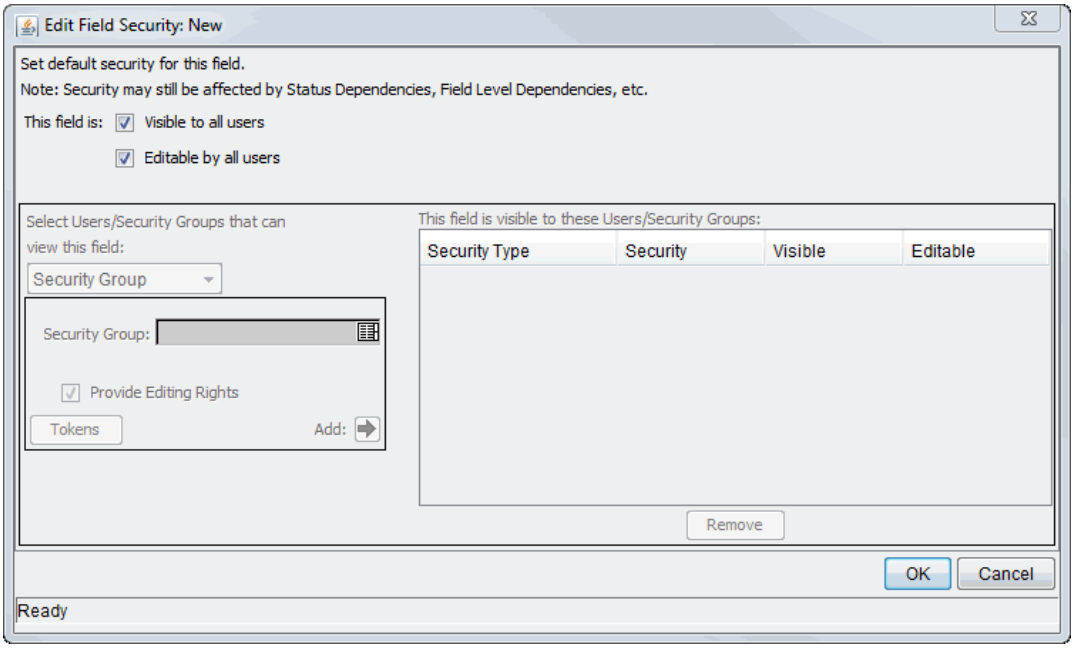
   The Field window opens to the **Attributes** tab.

8. Click the **Security** tab.



a. Click **Edit.**

The Edit Field Security window opens.



9. To specify that only certain users or groups be able to view and or edit the custom field:
    a. Next to **This field is,** clear the **Visible to all users** and **Editable by all users** checkboxes.
    b. In the **Select Users/Security Groups that can view this field** list, select one of the following:
        - **Security Group**
        - **User**
        - **Standard Token**
        - **User Defined Token**

        Your selection determines the label displayed for the auto-complete field below the list.
    c. Use the auto-complete field to select the security groups, users, standard tokens, or user-defined tokens that you want to be able to view this field.
    d. To give the selected items the ability to edit the field, leave the **Provide Editing Rights** checkbox selected. To make the field read-only for your selection(s), clear the checkbox.
    e. Click **Add.**

        The table on the right lists your selection(s).
    f. Repeat step c through step e to configure field visibility for additional users and groups.

        In the table on the right, the **Visible** and **Editable** checkboxes are selected by default for all of the selected users and group.
    g. In the table on the right, clear the **Visible** checkbox for the users and groups from which you want the field to be hidden.
    h. In the table on the right, clear the **Editable** checkbox for the users and groups for which you want the custom field to be read-only.
10. Click **OK.**
11. In the Field window, click **OK.**
12. In the User Data Context window, click **OK.**

Adding Columns to the Program Overview Page

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

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

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

- **Approved Budget**

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

Changed Column Names

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

- In the **Program Costs** section, **Planned** is renamed **Forecast.**
- In the **Content** section:
  - **Planned Labor** is renamed **Forecast Labor.**
  - **Planned Non-Labor** is renamed **Forecast Non-Labor.**
  - **Planned Total** is renamed **Forecast Total.**

More Information About Configuring User Data

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

- Copying field definitions
- Configuring user data field dependencies (detailed steps)
- Editing user data fields
- Removing fields
- Configuring user data layout

Chapter 4: Configuring Security for Program Management

Program Management Security

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

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

Table 4-1. Security features

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

Table 4-1. Security features, continued

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

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

Required Licenses

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

- Program Management
- Demand Management
- Project Management

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

Program Management

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

Demand Management

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

Project Management

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

Access Grants

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

The Program Management access grants are:

- **PMO: Create Programs.** When used with the Edit Programs access grant, this access grant allows a user to create a new program.
- **PMO: Edit Programs.** This access grant allows a user to modify all programs on which he is the assigned the program manager.
- **PMO: Edit All Programs.** This access grant allows users to create and modify any program.
- **PMO: Edit Program Types.** This access grant allows users to create and modify any program type.
- **PMO: View Program Types.** This access grant allows users to view any program type.
- **PMO: View Programs.** This access grant allows users to view program definitions.

Security Groups

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

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

Creating a Security Group and Assigning It Access Grants

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

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

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

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

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

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

   The PPM Workbench opens.
3. From the shortcut bar, select **Sys Admin > Security Groups.**

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

   The Security Group: Untitled window opens to the **Users** tab.
5. In the **Name** box, type a name for the security group.
6. Next to **Enabled,** click **Yes.**
7. Click **Save.**
8. Click the **Access Grants** tab.

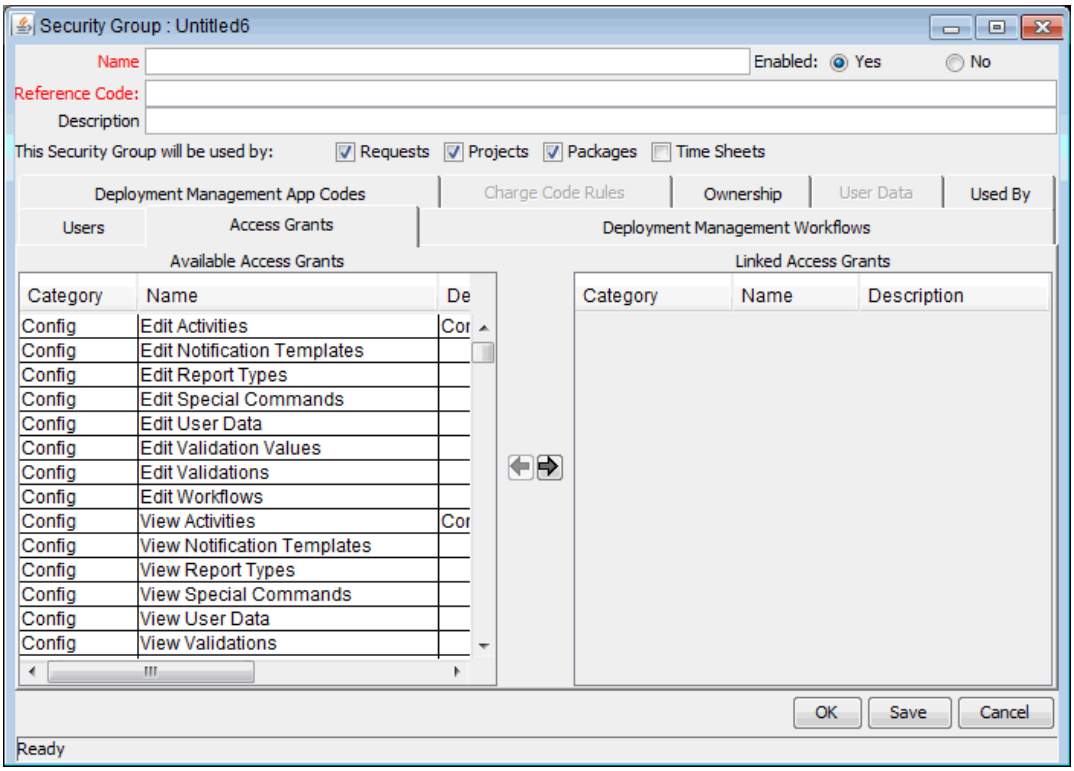
   The **Available Access Grants** table lists all of the access grants that you can assign to a security group. The **Category** column lists the PPM Center functional area with which each grant is associated.

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

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

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

   b. Click the arrow pointer.



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

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

The Security Group Workbench lists the security group you created.

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

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

Table 4-2. Program Management security group scenario

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

Configuring Program Management Users

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

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

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

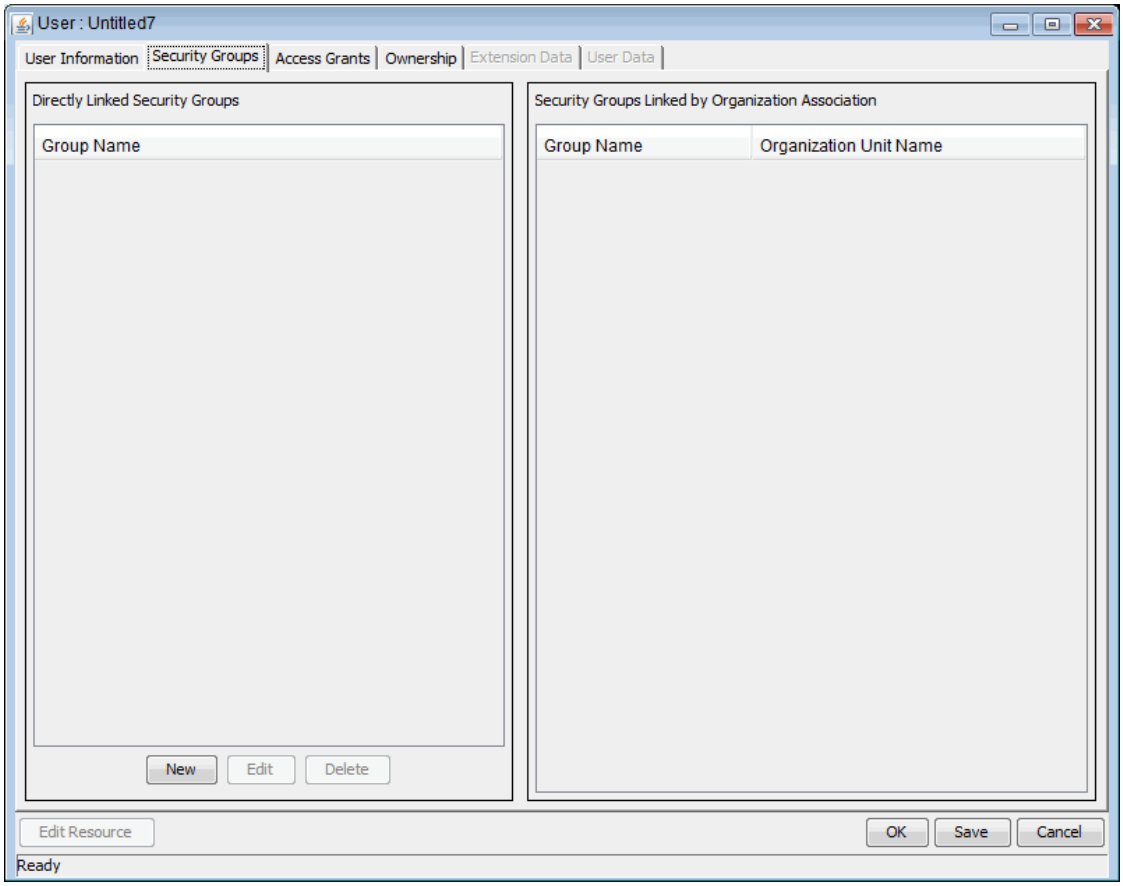
1. Log on to PPM Center.
2. On the menu bar, select **Open > Administration > Open Workbench.**

   The PPM Workbench opens.
3. On the shortcut bar, select **Sys Admin > Users.**

   The User Workbench opens.
4. Click **New User.**

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

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



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

   The Security Groups dialog box opens.

7. In the **Security Groups** field, click the auto-complete button, and then select the security groups.
8. Click **OK.**
9. To save your changes, click **OK.**

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

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

Security Group	Licenses	Definition
Program Manager	• Program Management	Corporate program managers who require full

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

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

Associating Security Groups with Workflows

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

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

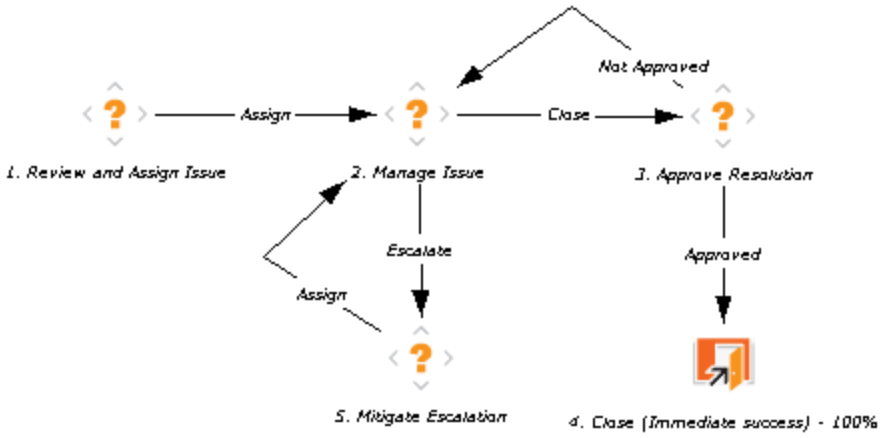
You can configure each workflow step so that only security groups or individual users that you specify can process it.

To configure an existing workflow step for a security group:

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

   The Workflow Workbench opens.
3. Open an existing workflow.

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



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

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

5. Click the **Security** tab.

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

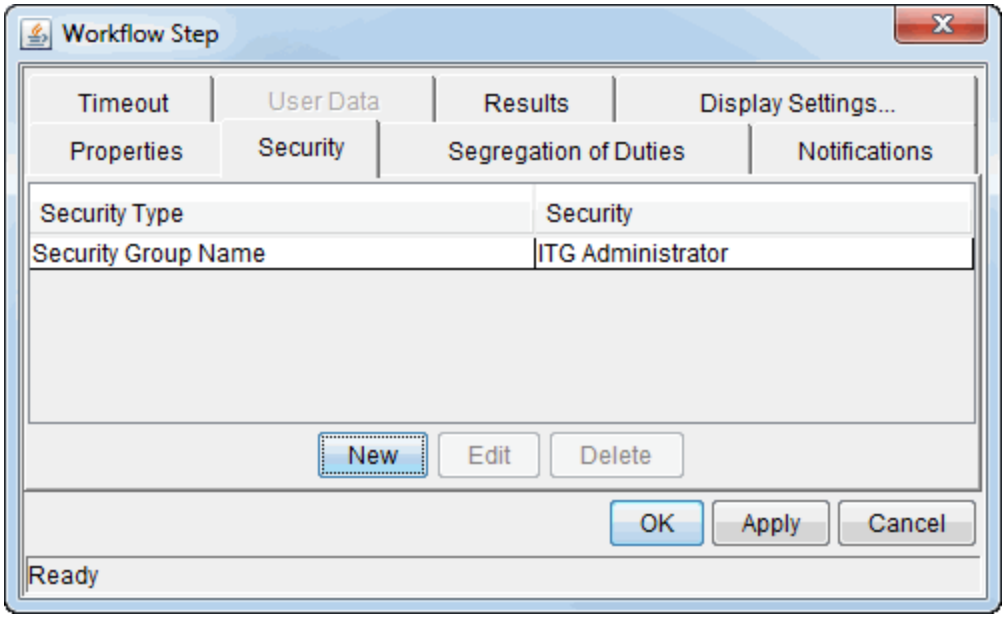
6. Click **New.**

   The Workflow Step Security window opens.

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

8. Click **OK.**

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



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

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

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

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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 Program Management Configuration Guide (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!