



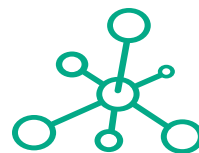
Project and Portfolio Management Center

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Program Management User's Guide

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Chapter 1: Getting Started with Program Management

- ["Introduction to Program Management" below](#)
- ["Related Documents" on the next page](#)

Introduction to Program Management

Program Management facilitates program managers to group related projects, proposals, and assets in a program where the program managers can govern them in an integrated and effective way, for the purpose of achieving a business objective that cannot be achieved by managing them individually. When programs created for various business objectives accumulate, Program Management also enables PMO to utilize program types to standardize the management of programs as well as mass update program policies in the organization.

The following shows an example how Program Management can be applied to manage programs:

1. RMO creates program types to default or impose policies for programs in the organization.

The policies cover the process required to complete programs (program workflow), how program health is tracked, whether programs are considered in Portfolio Management, and whether programs financial data is tracked.

See ["Configuring Program Types" on page 8](#) for more information.
2. Program managers create a program of a specific program type.

See ["Creating a Program" on page 20](#) for more information.
3. Program managers add business objectives for the program, and add related projects, proposals, and assets in the program.

See ["Adding Lifecycle Entities to a Program" on page 26](#) and ["Associating a Program with Business Objectives" on page 28](#) for more information.
4. Program managers configure program settings inherited from the program type to better meet the business objectives.

See ["Adjusting Program Settings" on page 21](#) for more information.

5. Program managers decide who can have view access to the program and program cost.
See ["Configuring Program Access" on page 23](#) for more information.
6. Program participants regularly govern the status of the program and the projects/ proposals/ assets included in the program, including their process, health, and financial data.
See ["Viewing General Program Information" on page 31](#), ["Viewing Program Cost Data" on page 53](#), and ["Overriding or Editing Program Health" on page 53](#) for more information.
7. Program managers coordinate inter-project timelines and milestones and accordingly manage program milestones.
See ["Managing Program Milestones" on page 51](#) for more information.
8. Program managers assess and resolve various risks, issues, and scope changes either submitted for the program or escalated from projects in the program.
See ["Managing Issues, Risks, and Scope Changes in Program Management" on page 32](#) for more information.
9. RMO changes the priority of the program if critical issues in the program should maintain high visibility for stakeholders.
See ["Updating Program Priorities" on page 66](#) for more information.

Related Documents

HPE recommends that, in addition to this guide, you consult the following related documents:

- *Program Management Configuration Guide*
- *Project Management User's Guide*
- *Demand Management User's Guide*
- *Financial Management User's Guide*
- *HPE-Supplied Entities Guide*(includes descriptions of all Program Management portlets, request types, and workflows)

Note: Many Program Management controls are modeled based on *A Guide to the Project Management Body of Knowledge* (PMBOK Guide from the Project Management Institute). These program controls include issues, risks, and scope changes.

Chapter 2: Configuring Program Types

- ["Overview of Program Types" below](#)
- ["Creating Program Type" below](#)
- ["Viewing and Editing a Program Type" on the next page](#)
- ["Configuring Program Type Policies" on page 10](#)

Overview of Program Types

Each program is associated with a program type on creation. A program type is used to default or impose business rules (or program policies) on programs of the program type. Using program types, PMO can standardize the management of different sets of programs in the organization.

At least one program type must be created so that you are able to create programs in Program Management. The program type "Enterprise" is included in Program Management upon installation.

- ["Creating Program Type" below](#)
- ["Viewing and Editing a Program Type" on the next page](#)
- ["Configuring Program Type Policies" on page 10](#)
- ["Program Type Policies VS Program Settings" on page 19](#)

Creating Program Type

To create a program type, you should have the **PMO: Edit Program Types** access grant.

1. Log on to PPM.
2. From the menu bar, select **Create > Administrative > Program Type**. The Create Program Type page opens.

3. Fill in the fields.

Field (* Required)	Description
*Program Type	Name of the program type. For example, enterprise.
Description	Description of the program type
*Program Process Request Type	The request type that controls the fields that appear on the Program Details tab of the Program Overview page. The workflow associated with the request type will drive the overall program process. For example, if you select Program Details as the program process request type, the Program Details tab displays the fields specified by the Program Details request type, and the programs of this program type go through the workflow of the Program Details request type.
Enable This Program Type	Whether this program type is enabled or not.

4. Configure program policies as described in ["Configuring Program Type Policies"](#) on the next page.

5. Click Create.

Viewing and Editing a Program Type

Viewing a Program Type

To view a program type, you should have the **PMO: View Program Types** or the **PMO : Edit Program Types** access grant.

1. Log on to PPM.
2. From the menu bar, select **Search > Administrative > Program Type**. The Manage Program Types page opens.

You can also create a program type from this page by clicking **Create New Program Type**.

3. Click the program type you want to view.

Clicking the **View Usage** link next to the page name, you will see a table listing the programs that use the program type.

Editing a Program Type

To edit a program type, you should have the **PMO : Edit Program Types** access grant.

1. Log on to PPM.
2. From the menu bar, select **Search > Administrative > Program Type**. The Manage Program Types page opens.
3. Click the program type you want to edit. The Modify Program Type page opens.
4. Edit the program type basic information and policies as you want.

Changes to the Program Process Request Type field do not impact any existing program.

For detailed information about configuring program type policies, see "[Configuring Program Type Policies](#)" below.

For information about the effect of program type policies changes on program settings, see "[Program Type Policies VS Program Settings](#)" on page 19.

Configuring Program Type Policies

Program type policies are grouped into four areas. These policies become the default settings of programs created from the program type they belong to.

- "[Financial Management](#)" on the next page
- "[Portfolio Management](#)" on the next page
- "[Program Health](#)" on page 12
- "[Issue/Risk Request Types](#)" on page 18

Financial Management

The Financial Management policy controls whether you can view financial information of the lifecycle entities (if these entities are configured to track this information) included in a program and program cost rolled up from these lifecycle entities.

Financial Management Settings

Allow program manager to override the setting



Enable Financial Management for this program

Enabling Financial Management allows you to view financial information for this program.

If Financial Management is enabled:

- The program cost graph is visible in program header, displaying program cost and budget.
- The **Cost** tab appears on the Program Overview page, providing a link of the program's financial summary, displaying program cost and financial information of lifecycle entities included in the program, and enabling you to use Earned Value Analysis to compare cost data across projects in the program.

Portfolio Management

The Portfolio Management policy controls whether you can add a program to a portfolio.

Portfolio Management Settings

Enable Portfolio Management for this program

Enabling Portfolio Management allows this program to be added as content to a portfolio.

You cannot disable Portfolio Management for a program if the program is currently associated with a portfolio.

When you enable the Portfolio Management, note the following about adding a program to a portfolio:

- You must have a Portfolio Management license.
- A program can be added to only one portfolio. For example, if Program1 is added to Portfolio1, Program1 cannot be added to any other portfolio.

- Program content (proposals, projects, or assets) can be added either to only one portfolio or to only one program. For example, if Program1 has Portfolio Management enabled, and if Project1 is added to Program1, Project1 cannot be added to Portfolio1. Likewise, if Proposal1 is added to Portfolio1, Proposal1 cannot be added to Program1.

See *Portfolio Management User's Guide* for more information.

Program Health

The Program Health policy controls whether issue health, risk health, scope change, and the program's overall health are tracked for a program, and also control the factors in the calculation of these types of health. The health are indicated by color-coded icons in the Program List portlet and Program Overview page.

- ["Issue Health"](#)
- ["Risk Health"](#)
- ["Scope Change Health"](#)
- ["Program's Overall Health" on page 17](#)

Issue Health

Issues introduce a framework for identifying and resolving all project and program-related issues. Issues can span multiple lifecycle entities to provide a finer level of visibility over the resolution process.

The **Track issue health for this program** option determines whether issue health is tracked for a program. By default issue health tracking is enabled. To disable it, deselect the **Track issue health for this program** option, and click **Save**.

Only when issue health tracking is enabled, the Issues section is available on the Program Overview page to display program issues and program-level project issues, and issue health indicator is available in program header.

When issue health tracking is enabled, you can change the following factors in issue health calculation:

- The weight of each issue priority

The issue priorities available in the Priority column are determined by the validation of the Priority field in program/project issue. By default, the validation is CRT - Priority - Enabled.

The default weights assigned to program issue priorities are:

- Critical: 5
 - High: 3
 - Medium: 1
 - Low: 0
- The threshold value of each issue health

The default issue health threshold values are:

- Red (High-risk): 40
- Yellow (At-risk): 20
- Green (On-track): all values less than 20

For example, suppose that you have assigned weights to the issue priorities for the program as follows:

- Critical: 8
- High: 5
- Medium: 3
- Low: 1

Suppose your program has the following issues:

- 3 high priority issues
- 2 medium priority issues
- 6 low priority issues

The overall health value computed for these program issues is $(3 * 5 + 2 * 3 + 6 * 1)$, or 27.

If the threshold value for the yellow health indicator is 20, and the threshold value for the red health indicator is 40, then the issue health indicator for this program is yellow.

What are program issues

- Issues logged directly against a program represent problems in the program itself. For example, a change in corporate direction may call for a re-evaluation of program goals.
- Issues submitted against projects can be escalated to the program level as necessary. Project issues that have not been escalated to the program level are not visible from Program Management.
- If an issue logged against a project that is linked to a program cannot be resolved by the project manager, that issue must be made visible at the program level. For example, an issue might involve coordination among multiple projects.

What program issues are used in issue health calculation

Only open issues logged directly against the program, or escalated to the program level of an active project within the program, are considered in calculating program issue health.

If a project is closed and becomes an asset, any issues that were escalated from the project to the program level are still visible from Program Management and are used to calculate program issue health.

Risk Health

Risks provide a way to log and resolve threats to program success. The process of gathering information about possible risks (including their impact and probability of occurrence) is streamlined.

The **Track risk health for this program** option determines whether risk health is tracked for a program. By default risk health tracking is enabled. To disable it, deselect the **Track risk health for this program** option, and click **Save**.

Only when risk health tracking is enabled, the Risks section is available on the Program Overview page to display program risks and project risks, and risk health indicator is available in program header.

When risk health tracking is enabled, you can change the following factors in risk health calculation:

- The weight of each risk impact

The risk impacts available in the Impact column are determined by the validations of the Risk Impact Level and Probability fields in program/project risk. By default, the validations are PMO - Risk Impact and PMO - Risk Probability respectively.

The default weights assigned to program risk impacts are:

- Level 1: 5
- Level 2: 3
- Level 3: 1
- The weight of each risk probability

The risk probabilities displayed in the Probability column are determined by the validation of the Probability field.

The default weights assigned to program risk probabilities are:

- High [26-100%]: 5
- Medium [11-25%]: 3
- Low [0-10%]: 1
- The threshold value of each risk health
 - Red (High-risk): 40
 - Yellow (At-risk): 20
 - Green (On-track): any value less than 20

Suppose, for example, that the weights assigned to risk impact and probability are as follows:

- Impact Level 1: 7
- Impact Level 2: 5
- Impact Level 3: 3
- Probability High: 3
- Probability Medium: 2
- Probability Low: 1

Three risks are logged against the program, as follows:

- Risk #1: Impact Level = 1, Probability = High
- Risk #2: Impact Level = 2, Probability = Low
- Risk #3: Impact Level = 3, Probability = High

The health contribution of each risk is computed by multiplying its impact weight by its probability weight. In this case, the risk health value is $(7 \times 3 + 5 \times 1 + 3 \times 3)$, or 35. If the yellow health

indicator threshold is 20, and the red health indicator threshold is 30, then the risk health for this program has a red health indicator.

Note that risks logged directly against a program and risks logged against the projects included in a program are used in calculating program risk health.

Scope Change Health

Scope changes provide a way to ensure that the scope of a program and its individual projects stay manageable. Scope changes logged against projects in the program must be visible at the program level if they are large or require focused attention for other reasons.

The **Track scope change health for this program** option determines whether scope change health is tracked for a program. By default scope change health tracking is enabled. To disable it, deselect the **Track scope change health for this program** option, and click **Save**.

Only when scope change health tracking is enabled, the Scope Changes section is available on the Program Overview page to display level 1 and 2 project scope changes, and scope change health indicator is available in program header.

When scope change health tracking is enabled, you can change the following factors in scope change health calculation:

- The weight of each scope change severity

The scope change severities available in the Severity column is determined by the validation of the Severity field of project scope change. By default, the validation is PMO - Scope Change Severity.

By default, the weight assigned to each scope change severity are:

- Critical: 5
 - High: 3
 - Medium: 1
 - Low: 0
- The threshold value of each scope change health

By default, the scope change health threshold values are:

- Red (High-risk): 40
- Yellow (At-risk): 20
- Green (On-track): any value less than 20

Suppose, for example, that the assigned weights of scope change severity for a program are:

- Critical severity: 8
- High severity: 5
- Medium severity: 3
- Low severity: 1

Suppose too that the program has the following scope changes:

- 3 critical scope changes
- 2 medium severity scope changes
- 6 low severity scope changes

Then, the overall computed health value for issues is $(3 \times 8 + 2 \times 3 + 6 \times 1)$, or 36. If the yellow health threshold is set to 20, the red health indicator threshold is set to 40, then the program scope change health is displayed with the yellow indicator.

Program's Overall Health

Program's overall health is a summary of the risk health, issue health, and scope change health. The **Track program health for this program** option determines whether overall program health is tracked for a program. By default program health tracking is disabled. To enable it, select the **Track program health for this program** option, and click **Save**.

When program health tracking is enabled, you can change the following factors in program health calculation:

- The weight assigned to program issue, program risk, and program scope change

By default, the weights assigned to them are:

- Issue: 1
 - Risk: 1
 - Scope change: 1
- The threshold value of each program health

The default threshold value of each program health is:

- Red (High-risk): 120
- Yellow (At-risk): 60
- Green (On-track): any value less than 60

The program health value is calculated as follows:

Program health value = Issue weight * Issue health value + Risk weight * Risk health value + Scope change weight * Scope change health value

For example, if you set the issue weight to 1, risk weight to 2, and scope change weight to 3, given the issue health value is 5, risk health value is 10, and scope change health is 15, then the program health value is $1*5 + 2*10 + 3*15 = 70$.

Suppose the threshold value of the yellow health indicator (warning) is 60, and that of the red health indicator (critical) is 120, then the program's overall health indicator is yellow (warning).

Overriding Calculated Program Health

When you enable program health tracking and select the **Allow program managers to override the program's calculated health** option, you can override the system-calculated health, and select another health for the program and keep the program in that health for a period of time. During this period, the program health no longer depends on the calculated health value.

Not that you can only edit this option when the **Track program health for this program** option is selected.

For more information about overriding program health, see ["Overriding or Editing Program Health" on page 53](#)

Issue/Risk Request Types

The Issue/Risk Request Types policy decides the request types of issues and risks added directly in Issues and Risks section of the Program Overview page.

Available options for Issue Request Type are request types that set Program Issue as the field group in its request header type.

Available options for Risk Request Type are request types that set Program Risk as the field group in its request header type.

Program Type Policies VS Program Settings

Every program contains a number of settings that can be configured by the program manager to suit particular program's needs. These settings are inherited from the policies of the program type the program belongs to.

What are overridable policies

Program type policies that can be overridden in the Program Settings page by program managers are overridable policies.

- The Financial Management policy is overridable when the **Allow program manager to override the setting** option is enabled.
- The Portfolio Management policy is always overridable.
- The Program Health policy is overridable when the **Allow program manager to override the setting** option is enabled.

For example, a program type called "Alpha Program" is created for Company A. "Alpha Program" has the **Allow program manager to override the setting** option enabled for the Health Indicators policy only. A manager creates a program of the "Alpha Program" type. The manager can change the Health Indicators policy and Portfolio Management policy in the Program Settings page to suit the program needs, but cannot change the Financial Management policy.

How program type policies affect program settings

Changing a program type policy has the following effects for existing programs of this program type:

- When a program type policy is overridable, the changes to its policy settings do not apply to existing programs.
- When a program type policy is not overridable, the changes to its policy settings are copied to the existing programs.

Chapter 3: Initiating a Program

A program is a collection of project, proposals, and assets and associated scope changes, risks, and issues. For example, at XYZ Corporation, a manager creates a program to oversee the upgrade of the customer Service computer system for better integration with the Sales force. The Customer Service, Sales, and IT managers create the projects. Each resource handles his or her own part of the work, which is linked to and monitored through the program. At the same time, risks and scope changes submitted against the program are tracked and managed.

- ["Creating a Program" below](#)
- ["Adjusting Program Settings" on the next page](#)
- ["Configuring Program Access" on page 23](#)
- ["Adding Lifecycle Entities to a Program" on page 26](#)
- ["Associating a Program with Business Objectives" on page 28](#)

Creating a Program

To create a program, you must have the Program Management license and either the Edit Programs and Create Programs access grants or Edit All Programs access grant. See *Security Model Guide and Reference* for more information about access grants.

1. Log on to PPM Center.
2. From the menu bar, select **Create > Program**.

The Create New Program page opens.

Create New Program

*Program Name:

*Program Type:

Program Managers: Joseph Banks

3. In the **Program Name** field, type the program name.
4. In the **Program Type** field, select a program type.

The program type decides the fields that are displayed in the **Details** tab of the Program Overview page, the workflow that the program goes through to complete its lifecycle, and the program settings.

You can only select a program type from the ones to which you have access.

5. (Optional) In the **Program Managers** field, specify one or more resources to assign as program managers. By default, the current user is listed in this field.

Only users with Program Management license are available for you to select.

6. If a user data field has been added to a program, fill the user data field.
7. Click **Create**.

The program is created and the Program Overview page opens in the Overview tab.

Note: If the program process request type specifies some mandatory fields on program creation, the program is created and the Program Overview page opens in the Details tab, with the mandatory fields highlighted.

Adjusting Program Settings

Every program contains settings that can be configured by the program manager to suit that particular program's objectives. These settings are inherited from the program type policies.

See ["Configuring Program Type Policies" on page 10](#) for detailed descriptions of each policy.

To view and adjust program settings:

1. Log on to PPM Center.
2. Open a program for which you want to change the indicator settings.

Note: For information on how to find and open a program, see ["Searching for Programs" on page 63](#).

3. In the upper-right corner, click ... > **Program Settings**.

The Program Settings page opens.

If there is a lock icon in a setting, it means program managers are not allowed to adjust this setting. The program type policy specifies whether or not a policy can be adjusted by a program manager in the program settings.

4. In the **Financial Management** policy, select or deselect the **Enable Financial Management for this program** checkbox to enable or disable financial management for the program.
5. In the **Portfolio Management** policy, select or deselect the **Enable Portfolio Management for this program** checkbox to enable or disable portfolio management for the program.

Enabling Portfolio Management allows the program to be added as content to a portfolio.

Note:

- If the program has been added as content to a portfolio, this checkbox must remain selected. If you deselect this checkbox, you will not be able to save the program settings.
- When you enable Portfolio Management for this program with multiple proposals/projects/assets on the Program Settings page, you may receive a data entry error message that lists all the conflicting entities, together with the name of the program/portfolio they belong to, in the following format:

```
Asset/Project/Proposal "X" is included in the portolio/portfolio-enabled program "Y".
```

6. In the **Program Health** policy, adjust the following:
 - **Issue health**
 - Select or deselect the **Track issue health for this program** option to enable or disable issue health tracking.

When you enable issue health tracking, the Issues section is available in the Program Overview page and issue health indicator is available in program header.
 - Adjust the weight of each issue priority.
 - Adjust the issue health threshold values.
 - **Risk health**
 - Select or deselect the **Track risk health for this program** option to enable or disable risk health tracking.

When you enable risk health tracking, the Risks section is available in the Program Overview page and risk health indicator is available in program header.
 - Adjust the weight of each risk impact.
 - Adjust the weight of each risk probability.
 - Adjust the risk health threshold values.
 - **Scope change health**

- Select or deselect the **Track scope change health for this program** option to enable or disable scope change health tracking.

When you enable scope change health tracking, the Scope Changes section is available in the Program Overview page and scope change health indicator is available in program header.

- Adjust the weight of each scope change severity.
- Adjust the scope change health threshold values.
- **Program health**
 - Select or deselect the **Track program health for this program** option to enable or disable program overall health tracking.
 - Adjust the weight of issue, risk, and scope change.
 - Adjust the program health threshold values.
 - Select or deselect the **Allow program managers to override the program's calculated health** option to decide whether program managers can specify a program health to override the health calculated based on issues, risks, and scope changes.

For information about overriding program's calculated health, see ["Overriding or Editing Program Health" on page 53](#).

Note: For information about the calculation of the above healths, see ["Configuring Program Type Policies" on page 10](#).

7. Click **Done** to save the changes to the indicator settings and close the Program Settings page.

Configuring Program Access

Organizations usually control access to some internal information and business processes, either to protect sensitive information, such as salaries, or to simplify business processes by hiding data that is of no interest to some users. Program Management includes two levels of data access:

- Program Access
- Cost Access

Program Access and Cost Access are configured on a program-by-program basis using the Configure Access page.

To edit or update access to a program:

1. Log on to PPM Center.
2. Open a program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

The Program Overview page displays the program information.

3. In the upper-right corner of the page, click **More > Configure Access**.

The Configure Access page opens.

Configure Access for Enterprise Business Application Save Done Cancel

Program Access

In addition to Joseph Banks, the Program Manager(s) of this Program, give view access to:

No One
 All Content Managers in this Program
 All other Program Managers
 All other Program Managers; and Content Managers in this Program
 Only these Security Groups:

Security Group

[Add Security Group](#)

Note: Only the Program Manager(s) of this Program can delete this Program.

Cost and Benefit Access

In addition to Joseph Banks, the Program Manager(s) of this Program, give view access to:

No One
 All Content Managers in this Program
 All other Program Managers
 All other Program Managers; and Content Managers in this Program
 Only these Security Groups:

Security Group

[Add Security Group](#)

Save Done Cancel

4. In the **Program Access** section, select one of the following to be given access to the program.
 - **No One**
 - **All Content Managers in this Program**
 - **All other Program Managers**
 - **All Program Managers; and Content Managers in this Program**
 - **Only these Security Groups:**

Note: Effectively, a program manager is any user who has the Edit Program (or Edit All Programs) access grant. If a user is an assigned program manager, but he does not have a required access grant, he cannot manage the program.

A user who has the Edit All Programs access grant already has full access to the program, even if, in the **Program Access** section, **No One** is selected.

5. If you selected **Only these Security Groups**, do the following.

- a. Under **Security Group**, click **Add Security Group**.

A selection window opens.

- b. To select a security group, click its name.

The selection window closes and the **Security Group** section lists the selected security group name.

Note: To remove a listed security group from the Configure Access page, click the delete icon to the left of its name.

To add another security group, click **Add Security Group** again.

6. The **Cost and Benefit Access** section should be used when Financial Management is enabled for the program. Select one option to assign view access to the program cost data.
 - **No One**
 - **All Content Managers in this Program**
 - **All other Program Managers**
 - **All Program Managers; and Content Managers in this Program**
 - **Only these Security Groups**

Note: By default, the program manager has full access to the program.

7. If you selected **Only these Security Groups**, do the following.

a. Under **Security Group**, click **Add Security Group**.

A selection window opens.

b. To select a security group, click its name.

The selection window closes and the **Security Group** section lists the selected security group name.

Note: To remove a listed security group from the Configure Access page, click the delete icon to the left of its name.

To add another security group, click **Add Security Group** again.

8. To save the changes and close the Configure Access page, click **Done**.

Adding Lifecycle Entities to a Program

1. Go to the **Overview** tab of the Program Overview page.

2. In the **Content** section, click **Add**.

The Add New Program Content window opens.

3. You can search for and select a lifecycle entity in one of two ways:

- **Add Specific Items.** Search for a specific type of lifecycle entity by name. Click the icon next to the text box of the lifecycle entity for which you want to search.

After you have selected the specific entity or entities by name, click **OK**. The entities you selected appear in the text box. Click **Add** to add these entities to the program.

- **Search for Program Content to Add.** Search for any lifecycle entity that meets the specified criteria.

After you have specified the search criteria, select **Search**. Any lifecycle entity that meets the search criteria is listed. Use the checkbox next to the lifecycle entity to select the entities to add to the program and click **Add**.

The Content section lists the selected lifecycle entities.

Note: The projects listed are only the projects for which you are a participant. If you have the View All Projects access grant, all projects are listed.

If the current program has Portfolio Management enabled, the lifecycle entities listed are only the lifecycle entities that do not belong to another portfolio or do not belong to a program that has Portfolio Management enabled. That is, if a lifecycle entity belongs to another portfolio or program with Portfolio Management enabled, it cannot be added to the current program.

If the current program does not have Portfolio Management enabled, all lifecycle entities are listed.

If a lifecycle entity is added to a portfolio or to a program that has Portfolio Management enabled but the portfolio or program is not saved, then that lifecycle entity is still listed and will continue to be listed until the portfolio or program is saved.

Note: When individual lifecycle entities are viewed (that is, you are viewing a proposal, project, or asset), the Associated Programs field lists the programs to which the entity is associated. The programs displayed are the programs to which you have View Programs, Edit Programs, or Edit All Programs access grants.

4. Lifecycle entities added to the program are saved automatically.

To remove a lifecycle entity from the program:

1. Select one or more lifecycle entities (use **Shift + Click** or **Ctrl + Click** to select more than one entity).
2. Click **Remove**.
3. Click **Yes** in the confirmation dialog.

To view closed content that is part of the program (closed content has a status of closed, completed, or cancelled), select the **Include Closed** checkbox. By default, closed content is not displayed in the Content section.

When you view a proposal, project, or asset that is added in a program, the Associated Programs field lists the programs to which the entity is associated. The programs displayed are the programs to which you have View Programs.

Grouping and Ungrouping Lifecycle Entities by Column Values

In the **Content** section of the Program Overview page, you can organize the rows by grouping them under headings that match the various values in any particular column. To do so,

1. Hover your mouse over the column heading that you want to use to group lifecycle entities.
2. Click the triangle in the column heading, and click **Group by <column name>**.

After the groupings are established, an additional **Ungroup** option appears when you click the triangle in any column. Clicking **Ungroup** removes the grouping.

Adding and Removing Columns in the Content section

You can add columns to and remove columns from the **Content** section of the Program Overview page. To do so,

1. Right-click the column heading row.
2. To add a column, select the column name.

To remove a column, deselect the column name.

Associating a Program with Business Objectives

Business objectives provide a way for you to capture business goals as discrete entities that you can then prioritize and tie to other entities, including programs. For example, XYZ Corporation creates the business objective "Reduce order to delivery time," assigns it a priority, and associates it with a program created to upgrade the customer service system.

You can associate a program with existing objectives. If you want to associate a program with a business objective that does not yet exist, you can create a new one.

Associating a program with existing business objectives

1. Open the program in the Overview tab.
2. In the **Business Objective** section, click **Add**.
A selection window opens and displays a list of business objectives.
3. Click the name of the business objective to associate with the program.
The selection window closes and the **Business Objective** section now lists the objective you selected.
4. To add more business objectives to the program, repeat step 1 and step 2.

Note: Clicking the delete icon in front of an associated business objective only unlinks it from the program. It does not delete the business objective.

Creating new business objectives

1. From the menu bar, select **Create > Administrative > Business Objective**.
The Create New Business Objective page opens.
2. Provide information about the business objective that you want to add.

Field Name	Description
Name	The name of the business objective.
State	The status of the business objective: <ul style="list-style-type: none">○ In Progress: The business objective is being developed.○ Achieved: The business objective has been completed.○ Cancelled: The business objective has been cancelled.
Owner	The program manager responsible for the business objective.
Priority	A positive non-zero integer used to rank the business objective. More than one business objective can share the same priority.
Description	A description of the business objective.

3. Click **Create**.
The Manage Business Objectives page now lists the new objective.

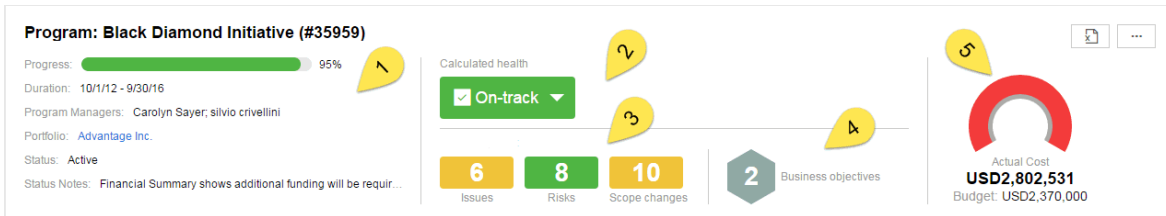
Note: If your PPM Center instance supports multiple languages, any business objective you create is defined in the language you selected at logon (your session language). After the business objective is created, it can be modified only in its definition language. For more information, see the *Multilingual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

Chapter 4: Executing a Program

When a program is initiated, you may want to view and monitor the program health and status, deal with program associated risks, issues, and scope changes, and manage program milestones. This section details how to execute a program.

Viewing General Program Information

Program header of the Program Overview page displays the following general program information



UI Element	Description
1	<p>Progress: Program progress is the percentage of the past days in the duration. Program progress = (Current date - Program start date) / Program duration</p> <p>Duration: Program duration is calculated based on scheduled start date and scheduled finish date of all projects included in the program. It derives the earliest project scheduled start date as its start date and the latest project scheduled finish date as its finish date.</p> <p>Portfolio: If the program has associated portfolio, the portfolio name is displayed. Clicking the name goes to the portfolio page. The field is available only when Portfolio Management is enabled for the program.</p> <p>Status: It is aligned with the Program Status field in Details tab, determined by the workflow step where the program has arrived.</p>
2	<p>This section displays program health status and program health type.</p> <p>For information about program health calculation, see "Program's Overall Health" on page 17</p> <p>For information about program health type, see "Types of program health" on page 53</p> <p>For information about overriding or editing program health, see "Overriding or Editing Program Health" on page 53.</p>

3	<p>This section displays the number of issues, risks, and scope changes of the program, and their health statuses, if you have enabled tracking their health.</p> <p>Clicking the issues rectangle directs you to the Issues section, and similarly for risks and scope changes.</p> <p>For information about managing issues, risks, and scope changes in Program Overview page, see "Managing Issues, Risks, and Scope Changes in Program Management" below.</p>
4	<p>This section displays the number of business objectives associated with the program. Clicking it directs you to the Business Objectives section.</p> <p>For information about associating business objectives with a program, see "Associating a Program with Business Objectives" on page 28.</p>
5	<p>This section displays the budget and actual cost of the program.</p> <p>Actual cost is in red when it is greater than budget. Otherwise, it is in green.</p> <p>Note: When your screen size is smaller than 1225 pixels, the chart is shrank and displayed next to business objectives.</p> <p>For information about viewing program cost data details, see "Viewing Program Cost Data" on page 53.</p>

Entering Program Details

The **Details** tab of the Program Overview page contains fields that hold detailed program information. These fields drive the program to move along its workflow.

The fields displayed in the **Details** tab of a program are determined by the program process request type specified when you create the program type to which the program belongs. You can configure these fields by configuring the program process request type.

For more information about configuring program process request type, see the *Program Management Configuration Guide*.

Managing Issues, Risks, and Scope Changes in Program Management

In a program lifecycle, issues, risks, and scope changes may appear in a program or in the projects included in it.

You can manage the following issues in Program Management when issue health tracking is enabled in program settings.

- Program issues: issues that are submitted directly against the program
- Program-level project issues: issues that are submitted against projects included in the program and are escalated to the program level

You can manage the following risks in Program Management when risk health tracking is enabled in program settings.

- Program risks: risks that are submitted directly against the program
- Project risks: risks that are submitted against projects included in the program

You can manage the following scope changes in Program Management when scope change health tracking is enabled in program settings.

- Scope changes: Level 1 and level 2 scope changes of projects included in the program

Submitting Issues, Risks, and Scope Changes

- ["Submitting Program Issues" below](#)
- ["Submitting Program-Level Project Issues" on page 35](#)
- ["Submitting Program Risks " on page 36](#)
- ["Submitting Project Risks " on page 38](#)
- ["Submitting Project Scope Changes " on page 40](#)

Submitting Program Issues

Program issues are issues submit against a program directly.

Note: To submit a program issue, you must be specified as a Program Issue request type participant who can create program issues. This is set in the Request Type window from the Request Workbench.

Submitting program issues from Program Overview page

You can create program issues in Program Overview page only when the following requirements are met:

- Issue health tracking is enabled in program settings.
 - Issue request type is specified in program settings.
1. Scroll to the Issues section, and click **Add** above the issue table.

The create new request page opens.

2. Fill in the request information.
3. Click **Submit**.

The program issue of the request type specified by Issue Request Type is created and added immediately in the Issues section.

Submitting program issues from the menu bar

1. From the menu bar, select **Create > Program Issue**.

2. Provide information in all required fields and any optional information you want to associate with this issue.

Field Name	Description
Summary Section	
Program	The program associated with the issue.
Priority	The priority of the issue. In Program Management, issues are grouped according to their assigned priority values. The values specified in the Priority field are used to calculate program health.
Assigned To	The resource to which the issue is assigned.
Description	A description of the issue.
Issue Details Section	
Date Identified	The calendar date on which the issue was recognized.
Due Date	The date by which the issue should be resolved.
Issue Type	The type of issue being raised.
Detailed Description	A detailed description of the issue.
Proposed Solution	The proposed solution for the issue.
Business Function	The business function that is affected by the issue.
Notes Section: Add Notes	
Notes to be added on save	Additional information to record about the program issue.
References Section: Reference Additions	
New Reference	Reference(s) to add to the program. See "Adding Program References" on page 55 for more information.

3. Click **Submit**.

It begins to move along its automatically assigned workflow toward resolution.

Submitting Program-Level Project Issues

Issues submitted against a project that is included in a program can be escalated to the program level as necessary. For example, if an issue logged against a project that is linked to a program cannot be resolved by the project manager, that issue can be escalated to the program level.

Note: To submit a project issue, you must be specified as a Project Issue request type participant who can create project issues. This is set in the Request Type window from the Request Workbench.

1. From the menu bar, select **Create > Project Issue**. The Create New Project Issue page opens.
1. Provide information in all required fields and any optional information you want to associate with this issue. Make sure you select **Program** in the **Escalation Level** field.
2. Click **Submit**.

The submitted project issue request begins to move along its assigned workflow toward resolution.

Submitting Program Risks

Program risks are risks submitted against a program directly.

Submitting program risks from Program Overview page

You can create program risks in Program Overview page only when the following requirements are met:

- Risk request type is specified in program settings.
 - Risk health tracking is enabled in program settings.
1. Scroll to the Risks section, and click **Add** above the risk table.

The create new request page opens.

2. Fill in the request information.
3. Click **Submit**.

The program risk of the request type specified by Risk Request Type is created and added immediately in the Risks section.

Submitting program risks from the menu

1. From the menu bar, select **Create > Program Risk**.
2. Provide information in all required fields and any optional information you want to associate with this risk.

Field Name	Description
Summary Section	
Created By	Read-only. Resource who created the risk.
Department	The department to which the risk is applied.
Sub-Type	Classifies the risk in more detail.
Workflow	Required. Assigns the process that defines the path that the request follows. It is automatically provided.
Request Status	Read-only. Indicator of the current state of the risk.
Priority	The priority of the risk.
Application	The application to which the risk is applied.
Contact Name	Full name of the contact for this risk.
Assigned To	The resource to which the risk is assigned.
Assigned Group	The security group to which the risk is assigned.
Contact Phone	Read-only. Phone number of the contact for the risk.
Request Group	The request group which the risk uses.
Contact Email	Read-only. Email address of the contact for the risk.
Description	A description of the risk.
Program Reference Section	
Program	Required. The program associated with the risk.
Program Risk Section	
Risk Impact Level	Required. Select a value to indicate risk severity. The risk impact level is used in analyzing risk activity and calculating risk resolution time. For more information, see "Analyzing Risk Activity" on page 47 and "Analyzing Risk Resolution Time" on page 48 .
Probability	Required. Select a value to indicate the estimated likelihood that the risk can occur.
Notes Section: Add Notes	
Notes to be added on save	Additional information to record about the program risk.

Field Name	Description
References Section: Reference Additions	
New Reference	Reference(s) to add to the program risk. See step 4 for more information.

3. To add a reference to the risk:
 - a. Expand the **References** section.
 - b. In the **New Reference** list, select a reference to add.
 - c. Click **Add**.
 - d. Add the reference.
 - e. Click **OK**.
 - f. In the Reference Program Window, click **Add**.

At the bottom of the Create New Program Risk Page, the **References to be added on Save** field displays the name of the reference you selected.

4. Click **Submit**.

It begins to move through its workflow toward resolution.

Submitting Project Risks

As a program evolves, risks to projects linked to the program can develop. You can use the project risk request type to identify these risks, collect information about them (impact level and probability of occurrence), and deal with them quickly.

To submit a project risk:

1. Log on to PPM Center.
2. From the menu bar, select **Create > Project Risk**.

The Create New Project Risk page opens.

3. Provide information in all required fields (**Project, Risk Impact Level, Probability, Description, and Date Identified**) and any optional information you want to associate with this risk.

Note: For the project risk to show up in Program Management, you must add a project

associated with a program or the program itself as a reference to the project risk.

Field Name	Description
Summary Section	
Assigned To	The resource to which the risk is assigned.
Project	The project associated with the risk.
Priority	The priority of the risk.
Risk Impact Level	Select a value to indicate risk severity. The risk impact level is used in analyzing risk activity and calculating risk resolution time. For more information, see "Analyzing Risk Activity" on page 47 and "Analyzing Risk Resolution Time" on page 48 .
Probability	Select a value to indicate the estimated likelihood that the risk can occur.
Description	A description of the risk.
Risk Details Section	
Risk Type	Select the type of risk being raised.
Date Identified	The calendar date on which the risk was recognized. The date the risk was created is used to calculate risk resolution time. For more information, see "Analyzing Risk Resolution Time" on page 48 .
Detailed Description	A detailed description of the risk.
Closure Criteria	The criteria for successfully closing the risk.
Action Plan	The proposed plan of action for dealing with the risk.
Notes Section: Add Notes	
Notes to be added on save	Additional information to record about the project risk.
References Section: Reference Additions	
New Reference	Reference(s) to add to the project. See step 4 for more information.

4. To add a program as a reference to the project risk:
 - a. Expand the **References** section.
 - b. In the **New Reference** list, select **Program**.

- c. Click **Add**.

The Reference Program window opens.

- d. Use the **Program** field to select the program to which you are adding the project risk as a reference.
- e. Click **OK**.
- f. In the Reference Program Window, click **Add**.

At the bottom of the Create New Project Risk Page, the **References to be added on Save** field displays the name of the program you selected.

- 5. Click **Submit**.

The submitted project risk begins to move through its workflow toward resolution.

Submitting Project Scope Changes

Events during the life of a program may require changes in program scope. These changes can be brought up, processed, and acted on in the form of Program Management Scope Change request types.

To submit a project scope change:

- 1. Log on to PPM Center.
- 2. From the menu bar, select **Create > Project Scope Change**.

The Create New Project Scope Change Request page opens.

- 3. Provide information in all required fields (**Project, CR Level, Business Impact Severity, and Description**) and any optional information you want to associate with this scope change.

Note: For the scope change request to show up in Program Management, you must add a project associated with a program or the program itself as a reference to the scope change request.

Field Name	Description
Summary Section	
Assigned To	The resource to which the scope change is assigned.

Field Name	Description
Project	The project associated with the scope change.
Priority	The priority of the scope change.
CR Level	Select a value to indicate the impact or importance of the scope change. Level 1 indicates a larger scope change request than Level 2 , and Level 2 indicates a larger scope change request than Level 3 . Only scope changes requests that are assigned Level 1 or Level 2 are visible in Program Management.
Business Impact Severity	The severity of the scope change's impact on the business.
Description	A description of the scope change.
Scope Change Details Section	
Assigned Release	The release to which the scope change is assigned.
Target Implementation Date	The date by which the scope change should be implemented.
Detailed Description	A detailed description of the scope change.
Benefit of Proposed Change	The benefit the proposed scope change would have.
Alternatives	Any alternatives to the scope change that exist.
List of Impacted Deliverables	A list of the deliverables impacted by the scope change.
Impact Summary	A summary of the impact the scope change will have.
Financial Impact	The dollar amount of the scope change's impact.
Schedule Impact (in days)	The number of days by which the scope change affects the schedule.
Notes Section: Add Notes	
Notes to be added on save	Additional information to record about the project scope change.
References Section: Reference Additions	
New Reference	Reference(s) to add to the project. See step 4 for more information.

4. To add a program as a reference to the scope change request:
 - a. Expand the **References** section.
 - b. In the **New Reference** list, select **Program**.

- c. Click **Add**.

The Reference Program window opens.

- d. Use the **Program** field to select the program to which you are adding the scope change as a reference.
- e. Click **OK**.
- f. In the Reference Program window, click **Add**.

At the bottom of the Create New Project Scope Change Request page, the **References to be added on Save** field displays the name of the program you selected.

5. Click **Submit**.

The project scope change request begins to progress through its workflow toward resolution.

Filtering Issues, Risks, and Scope Changes

Issues are filtered by priority. For example, clicking the High bar in the issue chart, you see all issues of high priority listed in the table.

Risks are filtered by probability and impact level. The risk chart categorizes risks by probability, and in each probability bar, risks of different impact levels are differentiated by colors. Clicking a color block filters risks of the same probability and impact level.

Scope changes are filtered by severity. For example clicking the High bar in the scope change chart, you see all scope changes of high severity listed in the table.

To clear filters for issues, risks, or scope changes, delete the filter above their table.

Searching for Issues, Risks, and Scope Changes

- ["Searching for Program Issues" on the next page](#)
- ["Searching for Project Issues" on the next page](#)
- ["Searching for Program Risks" on the next page](#)
- ["Searching for Project Risks" on page 44](#)
- ["Searching for Scope Changes" on page 45](#)

Searching for Program Issues

To search for program issues:

1. Log on to PPM Center.
2. From the menu bar, select **Search > Program Issues**.

The Search Requests page opens. **Program Issue** is selected in the **Request Type** list.

3. Specify the search criteria for the request, and then click **Search**.

The **Request Search Results** section lists the program issues that match your search criteria.

4. In the **Req #** column, click an entry to open the corresponding program issue request.

The Program Issue page opens.

5. Make any necessary changes to fields on the Program Issue page, and then click **Save**.

Searching for Project Issues

To search for project issues:

1. Log on to PPM Center.
2. From the menu bar, select **Search > Project Issues**.

The Search Requests page opens. Note that **Project Issue** is already selected in the **Request Type** list.

3. Specify your search criteria for the request, and then click **Search**.

The **Request Search Results** section lists the project issues that match your search criteria.

4. To open a listed project issue, in the **Req #** column, click its request number.

The Project Issue page opens.

5. Make any necessary changes, and then click **Save**.

Searching for Program Risks

To search for program risks:

1. Log on to PPM Center.
2. From the menu bar, select **Search > Program Risks**.

The Search Requests page opens. Under **Search for Requests to Review, Program Risk** is selected in the **Request Type** field.

3. In the **Search for Requests to View** section, specify the search criteria for the request.
4. To configure the display of the search results, in the **Choose Columns** section, move items between the **Available Columns** and **Selected Columns** fields.
5. Click **Search**.

The **Request Search Results** section lists the program risk records that match the search criteria.

6. To open a program risk request, in the **Req #** column, click the corresponding request number.
The Program Risk page opens.
7. Make any necessary changes to the program risk request, and then click **Save**.

Searching for Project Risks

To search for project risks:

1. Log on to PPM Center.
2. From the menu bar, select **Search > Project Risks**.

The Search Requests page opens. Under **Search for Requests to Review, Project Risk** is selected in the **Request Type** field.

3. In the **Search for Requests to View** section, specify the search criteria for the request.
4. To configure the display of the search results, in the **Choose Columns** section, move items between the **Available Columns** and **Selected Columns** fields.
5. Click **Search**.

The **Request Search Results** section lists the project risk records that match the search criteria.

6. To open a project risk request, in the **Req #** column, click the corresponding request number.
The Project Risk page opens.
7. Make any necessary changes to the project risk request, and then click **Save**.

Searching for Scope Changes

To search for a project scope change:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Scope Changes > Search Scope Changes**.

The Search Requests page opens. The **Request Type** list field displays the value **Project Scope Change Request**.

3. In the **Search for Requests to View** section, specify your search criteria.
4. To configure the display of the search results, in the **Choose Columns** section, move items between the **Available Columns** and **Selected Columns** fields.
5. Click **Search**.

Note: To list all project scope change requests, click **Search** without specifying search criteria.

The **Request Search Results** section lists project scope change requests that match your search criteria.

6. To open a listed project scope change request, in the **Req #** column click the request number.
The Project Scope Change Request page opens.
7. Make any necessary changes, and then click **Save**.

Analyzing Issues, Risks, and Scope Changes

- ["Analyzing Issue Activity" on the next page](#)
- ["Analyzing Issue Resolution Time" on the next page](#)
- ["Analyzing Risk Activity" on page 47](#)
- ["Analyzing Risk Resolution Time" on page 48](#)
- ["Analyzing Scope Change Activity" on page 49](#)
- ["Analyzing Scope Change Resolution Time" on page 50](#)

Analyzing Issue Activity

Program Management can display an issue activity graph that lets you view how many issues were created and how many resolved each month (or week) during a time range that you specify.

To view issue activity:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Issues > Analyze Issue Activity**.

The Issue Activity: Creation and Resolution over Time page opens.

3. In the **Filter By** section, provide the following information:

Field Name	Description
Show	The type of request to view. Use the default selection (Issues).
Program Name	The name of the program for which you want to view issue resolution information.
Projects	The names of the projects linked to the selected program for which you want to view issues (escalated) information. If you leave the Projects field empty, Program Management displays issue resolution time information for issues escalated to the program level from all projects linked to the program.
Resolution Date	The date range for which you want to view issue resolution information.
Period	The time increments used to display the issue resolution information. Select either Months (the default selection) or Weeks .

4. Click **Apply**.

The Issue Activity: Creation and Resolution over Time page displays the results.

This page displays a graph that depicts the created and resolved program issues and project issues that were escalated to the program level for the program and date range you specified.

Analyzing Issue Resolution Time

Program Management provides graphs that let you view how quickly submitted issues (both program issues and project issues escalated to the program level) are getting resolved.

To analyze issue resolution time:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Issues > Analyze Issue Resolution Time**.

The Issue Resolution: Average Resolution Time page opens.

3. In the **Filter By** section, provide the following information:

Field Name	Description
Show	The type of request to view. Use the default selection (Issues).
Program Name	The name of the program for which you want to view issue resolution information.
Projects	The names of the projects linked to the selected program for which you want to view issues (escalated) information. If you leave the Projects field empty, Program Management displays issue resolution time information for issues escalated to the program level from all projects linked to the program.
Resolution Date	The date range for which you want to view issue resolution information. The time an issue request was submitted is used to calculate issue resolution time.
Period	The time increments used to display the issue resolution information. Select either Months (the default selection) or Weeks .

4. Click **Apply**.

Program Management displays a graph that depicts the average (mean) number of days required to resolve the issues that were resolved during the time period you specified. These include program issues and project issues that were escalated to the program level.

Analyzing Risk Activity

To analyze risk activity:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Risks > Analyze Risk Activity**.

The Risk Activity: Creation and Resolution over Time page opens. In the **Show** list, **Risks** is selected.

3. Provide the following information:

Field Name	Description
Show	The type of request to view. Use the default selection (Risks).
Program Name	The name of the program for which you want to view risk activity.
Projects	The names of the projects linked to the selected program for which you want to view risk (escalated) activity. If you leave the Projects field empty, Program Management displays activity information on all risks for all projects linked to the program.
Resolution Date	The date range for which you want to view risk activity.
Period	The time increments used to display the risk activity. Select either Months (the default selection) or Weeks .

4. Click **Apply**.

Program Management displays a graph that depicts the number of risks created and resolved for the program and time range you specified.

5. To change the information displayed in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

Analyzing Risk Resolution Time

You can use Program Management to assess how quickly the risks associated with your programs are getting resolved.

To analyze resolution time:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Risks > Analyze Risk Resolution Time**.

The Risk Resolution: Average Resolution Time page opens.

3. In the **Filter By** section, provide the following:

Field Name	Description
Show	The type of request to view. Use the default selection (Risks).
Program Name	The name of the program for which you want to view risk resolution times.

Field Name	Description
Projects	The names of the projects linked to the selected program for which you want to view risk resolution information. If you leave the Projects field empty, Program Management displays resolution information on all risks for all projects linked to the program.
Resolution Date	The date range for which you want to view risk resolution information.
Period	The time increments used to display the risk resolution times. Select either Months (the default selection) or Weeks .

4. Click **Apply**.

The Risk Resolution: Average Resolution Time page displays a graph that depicts the mean number of days required to resolve risks during the date range you specified.

5. To change the view in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

Analyzing Scope Change Activity

To analyze project scope change activity:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Scope Changes > Analyze Scope Change Activity**.

The Scope Change Activity: Creation and Resolution over Time page opens.

3. In the **Filter By** section, provide the following:

Field Name	Description
Show	The type of request to view. Use the default selection (Scope Changes).
Program Name	The name of the program for which you want to view project scope change request activity.
Projects	The names of the projects linked to the selected program for which you want to view scope change request activity. If you leave the Projects field empty, Program Management displays activity information for all scope change requests for all projects linked to the program.
Resolution Date	The date range for which you want to view scope change request activity

Field Name	Description
	information.
Period	The time increments used to display the scope change request activity. Select either Months (the default selection) or Weeks .

4. Click **Apply**.

Program Management displays a graph that depicts the number of project scope changes created and resolved per month (or week) during the time period you specified.

5. To change the view in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

Analyzing Scope Change Resolution Time

You can use Program Management to assess how quickly the project scope change requests associated with your programs are getting resolved.

To view project scope change resolution times:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Scope Changes > Analyze Scope Change Resolution Time**.

The Scope Change Resolution: Average Resolution Time page opens.

3. In the **Filter By** section, provide the following:

Field Name	Description
Show	The type of request to view. Use the default selection (Scope Changes).
Program Name	The name of the program for which you want to view project scope change request resolution times.
Projects	The names of the projects linked to the selected program for which you want to view scope change request resolution times. If you leave the Projects field empty, Program Management displays resolution times for all scope change requests for all projects linked to the program.
Resolution Date	The date range for which you want to view average resolution times.
Period	The time increments used to display the scope change request resolution

Field Name	Description
	times. Select either Months (the default selection) or Weeks .

4. Click **Apply**.

Program Management displays a graph that depicts the mean number of days required to resolve project scope changes for the specified program and time period.

5. To change the data shown in the graph, in the **Filter By** section, modify the information, and then click **Apply**.

Managing Program Milestones

- ["Adding Program Milestones" below](#)
- ["Viewing Program Milestones" on the next page](#)
- ["Editing a Program Milestone" on the next page](#)

Adding Program Milestones

1. Open the program and go to the **Timeline** tab.
2. Click **Add Milestone**.
3. Fill the following fields in the Add Milestone window.

Field (*Required)	Description
*Name	Name of the milestone
*Type	Type of the milestone
*Planned finish date	Planned finish date of the milestone
Actual finish date	Actual finish date of the milestone
*Status	Status of the milestone
Owners	Owners of the milestone

4. Click **Add**. The program milestone is added.

If you want to add more than one milestone, click **Add more** instead to continue adding.

Viewing Program Milestones

The **Timeline** tab of the Program Overview page enables you to do the following:

- View the milestones of the program and of the projects included in the program.

Milestones displayed in different colors indicate different statuses.

- Green: the milestone is completed without delay
- Yellow: the milestone is completed with delay
- Red: the milestone is delayed and not completed
- Grey: the milestone is not reached

Put the mouse over a milestone, you will see the name, scheduled finish date, actual finish date, and owners of the milestone.

If the interval among several milestones is short, these milestones are indicated by one indicator. Putting the mouse over the indicator, you will see the information of a list of milestones.

- View the health status and percent complete of the program and projects.
- View the timelines of the program and of the projects included in the program.
- Click < to move the timeline backward and > to move the timeline forward. Click **TODAY** to go to the current date.

Editing a Program Milestone

1. Open the program and go to the **Timeline** tab.
2. Put your cursor over the program milestone you want to edit.
3. Click the edit icon in the upper right corner to open the Edit Milestone window.
4. Edit the program milestone information as you want.
5. Click **Done** to save the changes and close the window.

To delete the milestone, click **Delete**.

Viewing Program Cost Data

If a program has enabled financial management, the **Cost** tab is available in the Program Overview page, displaying the following program-related cost details.

- **Program cost:** program cost data from program financial summary.

To open the program financial summary, click the financial summary link in the upper-right corner of this tab.

For definitions of the program cost data, see the *Financial Management User's Guide*.

- **Program content cost:** cost data of all lifecycle entities included in the program.

If cost capitalization is enabled, cost (both forecast and actual) will be divided into operating cost and capital cost which are displayed in separate columns.

For definitions of the lifecycle entities' cost data, see the *Financial Management User's Guide*.

- **Earned value analysis**

- Analyze cumulative cost metrics for a project

Selecting a project in the list and clicking **Project EV Analysis**, you open the Analyze Cumulative Cost Metrics page for the project where you can evaluate a project's performance in terms of different cost variables over time.

- Analyze current cost metrics for projects

Clicking **Generate Cost Metrics Chart**, you see the cost metrics chart. Clicking the **Analyze** button at the bottom of the chart, you open the Analyze Current Cost Metrics page where you can compare sizes and cost health of one or more projects included in the program.

For detailed information about analyzing cumulative cost metrics and current cost metrics, see the *Financial Management User's Guide*.

Overriding or Editing Program Health

Types of program health

The type of program health is shown above the program health indicator. It is either of the following:

- Calculated health

The program manager enables the system to track program health. The program health is calculated by the system based on program issues, risks, and scope changes.

- User-selected health

The program manager does not enable the system to track program health, but manually selects a health status for the program.

- Overridden health

The program manager enables the system to track program health. The program manager overrides the system-calculated health and selects another health status for the program. The overridden health is valid for a specified duration.

How to override program health

Requirements to override program health

- **Track program health for this program** is checked in Program Settings.
 - **Allow program managers to override the program's calculated health** is checked in Program Settings.
1. On the Program Overview page, click the triangle in the program health box. The Override Health window opens.
 2. Select the health status you want.
 3. In the **Until** field, select a date.

The date is the last day when the program remains in the health that you selected in step 2. For example, if the date is Oct. 31, 2016, it means starting from Nov. 1, the program health is calculated by the system, no longer displayed in the health you selected.

4. In the **Description** field, enter some comments for the overriding.

This field only displays the comments for the latest overriding.

5. Click **Done** to save the changes and close the window.

How to edit program health

If program health tracking is not enabled for a program, you can manually select a health status for the

program and edit it anytime for any duration.

1. On the Program Overview page, click the triangle in the program health box. The Edit Health window opens.
2. Select the health status you want.
3. Click **Done** to save the changes and close the window.

Viewing Program Audit Trail

To view program audit trail, select ... > **Program Audit Trail** on the Program Overview page. It keeps track of the changes when you

- Change program settings.
- Add or remove program content.
- Add or remove business objectives.
- Add or delete program milestones.
- Override program health.

Adding Program References

This section contains information about the types of references you can add to a program such as attachments, existing packages, new packages, projects, existing requests, new requests, tasks, and URLs.

Attachments as References

To reference an attachment:

1. Open a program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Go to the **References** tab.

3. In the **New Reference** list, leave **Attachment** (the default) selected and click **Add**.

The Add Document window opens.

4. In the **File** field, click **Choose File** to select the attachment from your workstation.
5. In the **Author** field, you can type the name of the person who authored the attachment.
6. In the **Description** field, you can type information about the attachment and why it is referenced.
7. Click **Add**.

The file you specified is uploaded. In the **References** section of the Program Overview page, the **References to be added on Save** field displays the file name.

8. Click **Save References**.

Existing Packages as References

To reference an existing package:

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Go to the **References** tab.
3. In the **New Reference** list, select **Package (Existing)**.
4. Click **Add**.

The Add Reference: Package search window opens.

5. Specify the search criteria, and then click **Search**.

The Add Reference: Package window lists relationship types and displays the package(s) that match your search criteria.

6. Select the type of relationship, the package or packages, and then click **Add**.

The **Reference to be added on Save** section lists the selected package.

7. Click **Save References**.

New Packages as References

To reference a new package:

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Go to the **References** tab.
3. In the **New Reference** list, select **Package (New)**.
4. Click **Add**.

The Create New Package window opens.

5. Select the relationship, and then click **Create**.

The New Package window opens.

6. Type the package information, and then click **Save**.

The **Reference to be added on Save** section lists the new package. See the *Deployment Management User's Guide* for more information about packages.

7. Click **Save References**.

Projects as References

To attach an existing project as a program reference:

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Go to the **References** tab.
3. In the **New Reference** list, select **Project**.
4. Click **Add**.

The Add Reference: Project window opens.

5. Specify your search criteria, and then click **Search**.
6. Locate and select one or more projects to add as program references.
7. Click **Add**.
8. The **Reference to be added on Save** section lists the selected project(s).
9. Click **Save References**.

Existing Requests as References

You can associate project risks, scope changes, and issues directly to a program without linking the associated project(s) to the program. Any such project requests that you attach as a program reference are visible in the corresponding sections of the Program Overview page (in the **Issues, Scope Changes, and Risks** bar graphs) and affect program health only if they are from projects that are directly linked to the program.

To reference existing requests to programs.

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see ["Searching for Programs" on page 63](#).

2. Go to the **References** tab.
3. In the **New Reference** list, select **Request (Existing)**.
4. Click **Add**.

The Add Reference: Request search window opens.

5. Specify your search criteria, and then click **Search**.

The window lists the relationship types you can select to indicate how the requests you select are related to the program, and it displays the requests that match your search criteria.

6. Select the relationship type and the requests to add as references.
7. Click **Add**.

The **Reference to be added on Save** section lists the selected request(s).

8. Click **Save References**.

New Requests as References

To add a new request as a program reference:

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Go to the **References** tab.
3. In the **New Reference** list, select **Request (New)**.
4. Click **Add**.

The Create New Request window opens.

5. In the **Request Type** list, select the request type.
6. Under **Relationship**, select the relationship option that indicates how the new referenced request is related to the program.
7. Click **Create**.

The Create New window opens.

8. Type the information required to create the request.

Note: For complete details on how to create requests, see the *Demand Management User's Guide*.

The **Reference to be added on Save** section lists the new request.

9. Click **Save References**.

Tasks as References

You can add existing tasks as program references.

To reference an existing task:

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Go to the **References** tab.
3. In the **New Reference** list, select **Task**.
4. Click **Add**.

The Add Reference: Task search window opens.

5. Specify your search criteria, and then click **Search**.

The window lists relationship types and lists the tasks that match your search criteria.

6. At the top of the page, select the type of relationship task(s) are to have to the program.
7. Click **Add**.

The **Reference to be added on Save** section displays the referenced task(s).

8. Click **Save References**.

URLs as References

You can reference an existing URL to a program.

To specify a URL as a program reference:

1. From the PPM Dashboard, open the program.

Note: For information on how to search for and open a program, see "[Searching for Programs](#)" on page 63.

2. Scroll to the **References** section.
3. In the **New Reference** list, select **URL**.
4. Click **Add**.

The Reference URL window opens.

5. In the **URL** field, type the URL.
6. In the **Description** field, you can type information about the URL.

7. Click **OK**.

The **Reference to be added on Save** section displays the URL.

8. Click **Save References**.

Adding Notes to a Program

1. Go to the **Notes** tab of the Program Overview page.
2. In the Add note area, enter the note you want to add for the program.
3. Click **Post**.

The note you added, along with the creator and creation time, is displayed in the Notes history area.

Exporting Programs to Microsoft Excel

To export the Program Overview page to a Microsoft Excel file:

1. Open the program to export.
For more details on searching for and opening projects, see ["Searching for Programs" on page 63](#).
2. In the upper-right corner of the Program Overview page, click **Export to Excel**.
3. Save the exported Excel file.

The following table illustrate program data exported to different Excel sheets.

Program Data in Program Overview Page	Exported to Excel Sheet
Fields in program header	Overview
Lifecycle entities added in the program	Content
Issues displayed in the Overview tab	Issues
Risks displayed in the Overview tab	Risks
Scope changes displayed in the Overview tab	Scope changes

Business objectives associated with the program	Business objectives
Program cost table and program content cost table in the Cost tab	Cost
Earned Value Analysis in the Cost tab	Earned Value Analysis
Timeline tab	Timeline
	<p>Milestones</p> <p>When you click a milestone in the Timeline sheet, you are directed to the Milestone sheet listing all the milestones of the lifecycle entity, with the milestone you clicked selected.</p>

Note: When you click the **Export to Excel** link in the upper-right corner of the Program Overview page, only the displayed columns in the **Content** section are exported to Excel, in the order they are displayed. In other words, the Excel file reflects any changes you have made to the columns selected for display and to the column layout.

Deleting Programs

You can use the Program Overview page to delete a program. The program's lifecycle entities and associated scope changes, risks, and issues are not deleted.

Note: In order to delete a program, you must be assigned as a program manager of the program and you must have either the PMO: Edit Programs or PMO: Edit All Programs access grant.

To delete a program:

1. Log on to PPM Center.
2. Search for and select the program (see ["Searching for Programs" on the next page](#)).

The Program Overview page opens.

3. In the upper-right corner of the page, click ... > **Delete**.

Chapter 4: Searching for Programs

You can search for programs in one of two ways:

- **Search box.** Use the search box if you know the name of the program or want to search for one or more programs that start with a particular phrase or fragment of text in its name. The search box is located in the upper-right corner.
- **Search Programs page.** Use the Search Programs page if you want to search for a program based on criteria such as program manager, program status, contained project, creator, business objectives, priority, or creation date.

Using the Search Box

The search box is used to locate and open programs based on program names that begin with the specified text.

To locate and open a program using the search box:

1. Log on to PPM Center.
2. In the search box, located on the right side of the menu bar, type @ followed by the text for which to search that is at the beginning of the program name. When you start typing the text, a submenu appears (the search is not case-sensitive).
3. Once you have finished typing your search text, select **Search for programs: <search_text>**.

If the search text matches only one program name, the Program Overview page for that program opens.

If the search text matches more than one program name, the Search Programs page opens, displaying a list of programs with matching names. Click the name of a program to open its Program Overview page.

Using the Search Programs Page

To search for and view an existing program using the Search Programs page:

1. Log on to PPM Center.
2. From the menu bar, select **Search > Programs**.
3. From the Search Programs page, do one of the following:
 - Search a program by the program number, and then click **Go**.
 - Specify your search criteria, and then click **Search**.

Field Name	Description
Program Name starts with	Specify a string. The search results display all programs whose name starts with the specified string.
Program Managers	Specify or select one or more users. The search results display all programs managed by the specified user(s).
Program Type	Specify or select one or more program types. The search results display all programs of the program types.
Contains	Specify or select one or more lifecycle entities (proposals, projects, or assets) associated with the program. The search results display all programs that contain at least one of the specified lifecycle entities.
Created By	Specify or select one or more users. The search results display all programs that were created by the specified user.
Business Objectives	Specify or select one or more business objects. The search results display all programs with the specified business objective(s).
Show only Portfolio Management enabled programs	Select Yes to search for programs that have Portfolio Management enabled. Select No to search all programs.
Relative Priority From/To	Specify a range of priority levels. The search results display all programs in the specified range of priority levels.
Create Date From/To	Specify or select a range of dates. The search results display all programs that were created in the specified range of dates.

Field Name	Description
Sort By	Select the field on which to sort the programs that match the search criteria.
Ascending/Descending	Indicate the sorting sequence.
Results Displayed Per Page	Specify the maximum number of search results to display on a page. Type any positive integer.

- Alternatively, to view a list of all programs, click **Search** without providing search criteria.
4. Under **Select a Program to View**, in the **Program Name** column, click a program name.

The program is displayed on the Program Overview page.

Chapter 5: Updating Program Priorities

Over time, as some business objectives are met and others become more pressing, you can change the priorities of the programs underway in your organization. This helps to ensure that the most critical issues maintain high visibility for stakeholders.

To change the priority of a program relative to other programs set up for your organization, do the following:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Program Management > Prioritize Programs**.

The Prioritize Programs page opens and lists existing programs. If the programs have been assigned priority values, the page lists them in descending order of priority.

3. In the **Relative Priority** field to the right of the program name, type an integer that indicates the new priority level.
4. If necessary, change the relative priority values for other programs listed.
5. Click **Save**.

Chapter 6: Program Manager Page

- ["Overview of the Program Manager Page" below](#)
- ["Adding the Program Manager Page to the PPM Dashboard" on page 69](#)
- ["Portlets on the Program Manager Page" on page 69](#)
- ["Customizing Portlets" on page 73](#)

Overview of the Program Manager Page

Program Management comes with a preconfigured Program Manager page. The Program Manager page can display one or multiple programs, depending on how you configure the portlets on the page. You can also configure multiple Program Manager pages to view multiple programs. ["Figure 6-1. Program Manager page" on the next page](#) shows the Program Manager page.

Figure 6-1. Program Manager page

Program Manager

 Reset Cycle Export Add Personalize

Program List ?

Program Name	Relative Priority	Program Manager	Program Status	Issues	Risks	Scope Changes
Billing Systems Integration		Admin User	New	● 2	● 2	● 2
IT Hardware Upgrade		Admin User	New	● 1	▲ 1	● 0

[Export to Excel](#) ⏪ ⏩ Showing 1 to 2 ⏪ ⏩

Program Contents List ?

Req ID ▲	Name	Type	Status
● 30125	Developer Tools Improvements	Project	In Planning
● 30126	ERP Service Pack	Project	In Planning
● 30127	Project 1001	Project	In Planning

[Export to Excel](#) ⏪ ⏩ Showing 1 to 3 ⏪ ⏩

Issue List ?

Project ▲	Issue #	Priority	Escalation Level	Status	Description
	30132	High	Program	New	Get a complete list of billing systems
	30123	Normal	Program	New	Coordinate pre-beta test effort
	30131	High	Program	New	Get a complete list of IT hardware

[Export to Excel](#) ⏪ ⏩ Showing 1 to 3 ⏪ ⏩

Program Scope Change List ?

Project ▲	Scope Change #	Severity	Change Request Level	Status	Description
Developer Tools Improvements	30133	High	Level 1	New	Upgrade to the latest
ERP Service Pack	30129	Medium	Level 2	New	ERP Service Pack

[Export to Excel](#) ⏪ ⏩ Showing 1 to 2 ⏪ ⏩

Program Risk List ?

Project ▲	Risk #	Probability	Impact Level	Status	Description
Developer Tools Improvements	30128	Medium [11-25%]	Level 2	New	Developer Tools Improvements
Developer Tools Improvements	30134	Medium [11-25%]	Level 2	New	Latest versions may not be supported in the pro...

[Export to Excel](#) ⏪ ⏩ Showing 1 to 2 ⏪ ⏩

Program Cost Summary ?

Cost Overview		Forecast	Actual
Labor		\$0	\$0
Non-Labor		\$500,000	\$0
Total		\$500,000	\$0

[Earned Value Details](#)

Adding the Program Manager Page to the PPM Dashboard

To add the preconfigured Program Manager page to your PPM Dashboard:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard**.

The Personalize Dashboard page opens.

3. Click **Private pages** in the area to the right of the menu bar.
4. Click the **Add New** icon.
5. Select **Add Preconfigured Pages**.

A list of available preconfigured PPM Dashboard pages is displayed.

6. Select the **Program Manager** page and click **OK**.

The page is added to your PPM Dashboard.

7. Customize the Program Manager page and portlets as required.

The changes to your PPM Dashboard are automatically saved.

Portlets on the Program Manager Page

This section provides description of the default portlets displayed on the Program Manager page. For information on how to personalize these portlets, see ["Customizing Portlets" on page 73](#).

Program List Portlet

The Program List portlet (["Figure 6-2. Program List portlet" on the next page](#)) provides a high-level summary of the details for all programs in your system. It displays such general information as program priority, status and associated issues. You can personalize this portlet so that it filters records based on program name or on a project-related criterion and so that users can focus on just the data relevant to them.

Figure 6-2. Program List portlet

Program Name	Relative Priority	Program Manager	Program Status	Issues	Risks	Scope Changes
Billing Systems Integration		Admin User	New	● 2	● 2	● 2
IT Hardware Upgrade		Admin User	New	● 1	▲ 1	● 0

Note: To view a listed program, click an item in the **Program Name** column.

To display descriptions of all the filter fields that you can configure for the Program List portlet, in the upper-right corner of the portlet, click the help icon (?).

Program Contents List Portlet

The Program Contents List portlet ("Figure 6-3. Program Contents List portlet" below) provides a view into all the projects associated with a program and their respective health indicators. This portlet can have multiple instances for viewing different programs and their associated projects. You can select which projects the portlet displays based on a number of specified criteria, including project name, status, and health. Clicking an entry in the **Name** column drills down to the Project page.

Figure 6-3. Program Contents List portlet

Req ID ▲	Name	Type	Status
● 30125	Developer Tools Improvements	Project	In Planning
● 30126	ERP Service Pack	Project	In Planning
● 30127	Project 1001	Project	In Planning

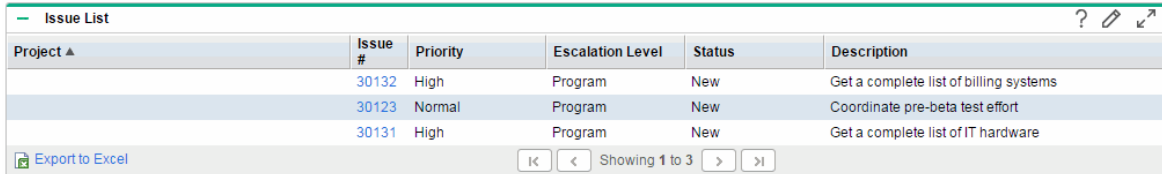
To display descriptions of all the filter fields that you can configure for the Program Contents List portlet, in the upper-right corner of the portlet, click the help icon (?).

Issue List Portlet

The Issue List portlet ("Figure 6-4. Issue List portlet" on the next page) lists all the issues that are directly associated with a selected program. You can display multiple instances of this portlet on a page so that you can view several programs and their associated issues at the same time.

You can personalize the Issue List portlet to display issues based on specific criteria, including program status, priority, escalation level, and so on. You can view information about an individual project by clicking its listing in the **Project** column.

Figure 6-4. Issue List portlet



Project ▲	Issue #	Priority	Escalation Level	Status	Description
	30132	High	Program	New	Get a complete list of billing systems
	30123	Normal	Program	New	Coordinate pre-beta test effort
	30131	High	Program	New	Get a complete list of IT hardware

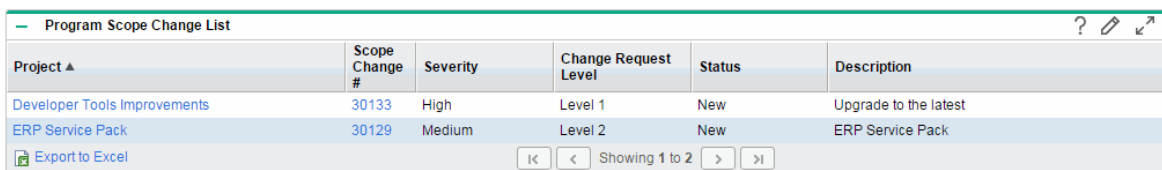
To display descriptions of all the filter fields that you can configure for the Issue List portlet, in the upper-right corner of the portlet, click the help icon (?).

Program Scope Change List Portlet

The Program Scope Change List portlet lists all the scope changes associated with a given program ("Figure 6-5. Program Scope Change List portlet" below). You can display multiple instances of this portlet on a single page so that you can view several programs and their associated scope changes at the same time.

You can customize the Program Scope Change List portlet to display scope changes based on status, severity, change request level, and so on. You can view information about an individual project by clicking its listing in the **Project** column.

Figure 6-5. Program Scope Change List portlet



Project ▲	Scope Change #	Severity	Change Request Level	Status	Description
Developer Tools Improvements	30133	High	Level 1	New	Upgrade to the latest
ERP Service Pack	30129	Medium	Level 2	New	ERP Service Pack

To display descriptions of all the filter fields that you can configure for the Program Scope Change List portlet, in the upper-right corner of the portlet, click the help icon (?).

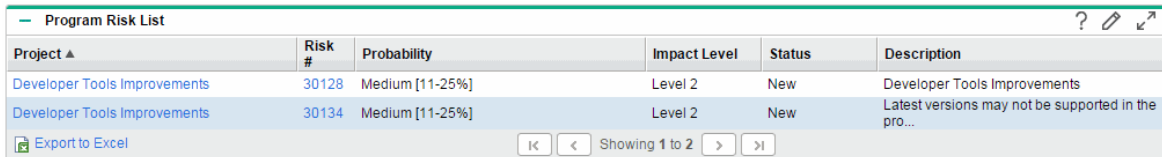
Program Risk List Portlet

The Program Risk List portlet ("Figure 6-6. Program Risk List portlet" below) lists all of the risks associated with a selected program. You can display multiple instances of this portlet on a page so that you can view several programs and their associated risks at the same time.

You can personalize the Program Risk List portlet to display risks based on status, impact level, probability, and so on.

Clicking an entry in the **Project** column drills down to the Project page.

Figure 6-6. Program Risk List portlet



Project ▲	Risk #	Probability	Impact Level	Status	Description
Developer Tools Improvements	30128	Medium [11-25%]	Level 2	New	Developer Tools Improvements
Developer Tools Improvements	30134	Medium [11-25%]	Level 2	New	Latest versions may not be supported in the pro...

To display descriptions of all the filter fields that you can configure for the Program Risk List portlet, in the upper-right corner of the portlet, click the help icon (?).

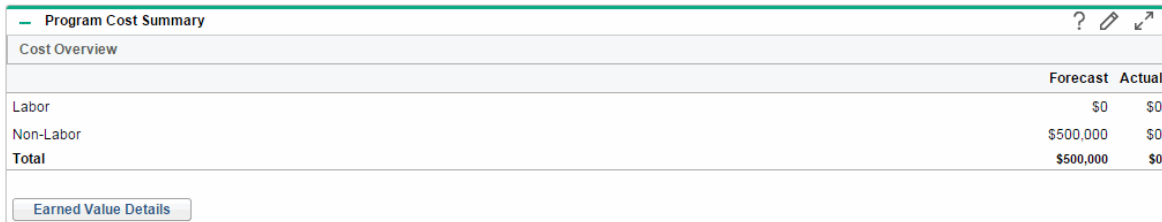
Program Cost Summary Portlet

The Program Cost Summary portlet ("Figure 6-7. Program Cost Summary portlet" on the next page) displays an overview of program cost health based on rolled-up costs of the content (proposals, projects, and assets) in the program. The displayed figures include breakdown of labor and non-labor costs, total expenses set against baseline, and forecast versus actual costs.

The Program Cost Summary portlet has just one filter field, which is **Program Name**.

Note: Financial Management must be enabled and financial summaries must be active in order for this portlet to display data. If a project's financial summary is not active, cost information from that project's work plan is used.

Figure 6-7. Program Cost Summary portlet



	Forecast	Actual
Labor	\$0	\$0
Non-Labor	\$500,000	\$0
Total	\$500,000	\$0

Click **Earned Value Details** to open the EV Analysis tab of the program. The EV Analysis tab allows you to compare cost data, such as SPI and CPI, across projects in the program. See *Financial Management User's Guide* for more information about cost data and formulas.

Customizing Portlets

You can change what data a portlet displays and, to some degree, how it displays the data.

To customize a portlet:

1. Log on to PPM Center.
2. Open the PPM Dashboard page that displays the portlet you want to customize.
3. In the upper-right corner of the portlet, click the **Edit** icon.

The Edit Preferences page opens.

4. To change the portlet title displayed on the page:
 - a. At the top of the page, click **Change Title**.
The Edit Portlet Title window opens.
 - b. In the **Title** field, select the current title, and then type the new title.
 - c. To save the title, click **Change**.
5. In the **Preferences** and **Choose Display Columns** sections, make any necessary changes.

Note: To view a description of the controls in the **Preferences** section, return to the portlet, and, in the upper-right corner, click the **Help** icon.

6. Click **Done**.

The portlet reflects your changes.

For more information about working with portlets, see *Creating Portlets and Modules*.

Send documentation feedback

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

Feedback on Program Management User's 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!