HP Project and Portfolio Management Center

Software Version: 7.1

Getting Started

Document Release Date: March 2007

Software Release Date: March 2007

Legal Notices

Documentation Updates

This manual's title page contains the following identifying information:

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

To check for recent updates, or to verify that you are using the most recent edition of a document, go to: http://ovweb.external.hp.com/lpe/doc_serv/.

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Mercury Product Support

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- If you have an active HP Software support contract, visit the HP Software Support site and use the Self-Solve Knowledge Search to find answers to technical questions.
- For the latest information about support processes and tools available for products formerly produced by Mercury, we encourage you to visit the HP-Mercury Software Support web site at: support.mercury.com.
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HP Software Support

You can visit the HP Software Support web site at www.hp.com/managementsoftware/services.

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

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To find more information about access levels, go to: www.hp.com/managementsoftware/access_level.

To register for an HP Passport ID, go to: www.managementsoftware.hp.com/passport-registration.html.

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1 Introduction

In This Chapter:

Overview of HP Project and Portfolio Management Center

Welcome to HP Project and Portfolio Management Center!

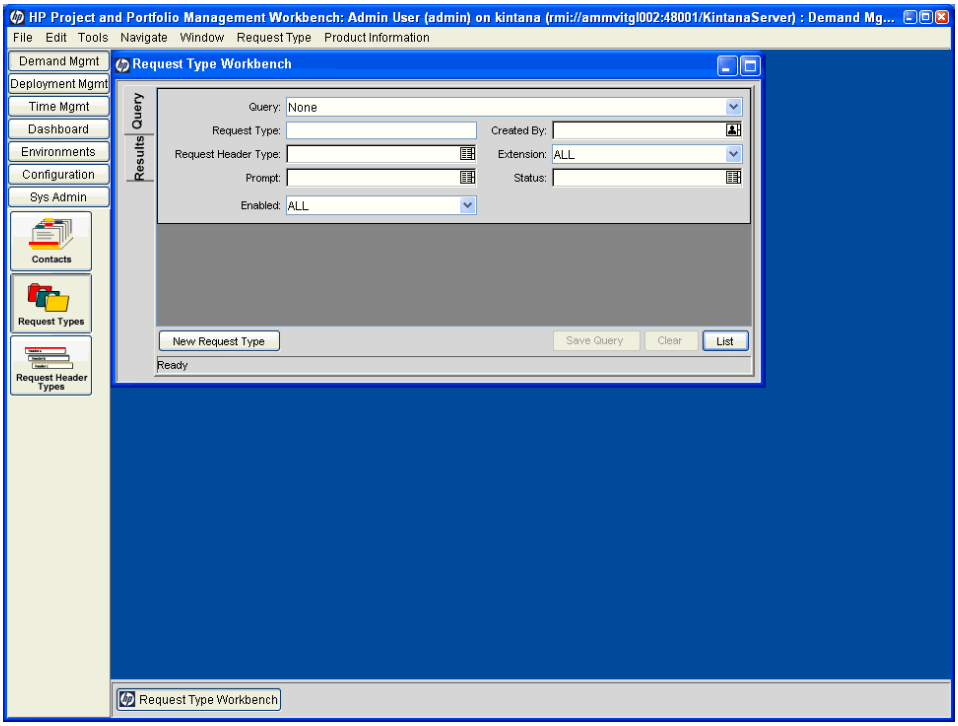
This guide provides the basic details you need to navigate PPM Center. The guide also describes how to perform common tasks and personalize your pages to make them work best for you.

Most PPM Center users work in the standard user interface, which appears as a collection of specialized Web pages. These pages open in a Web browser and offer you a customized view into PPM Center. From these pages, you can run reports, submit requests, and create projects, among other things. Most importantly, you view and use the PPM Dashboard. The PPM Dashboard is a real-time Web page view into your PPM Center system. Using portlets, you can view important information about your work environment, from the status of requests assigned to you, to comparisons between current projects and staffing profiles. *Figure 1-1* shows an example of the standard user interface and its pages. Chapter 2, *Using the Web Pages,* on page 21, discusses the pages and how to navigate them in greater detail.

Figure 1-1. PPM Center standard user interface

In addition to the standard user interface, some users need to use the PPM Workbench to accomplish certain tasks. Unlike the Web pages, which open in a Web browser, the PPM Workbench opens in its own window. Designed for more advanced users, the PPM Workbench is where much of the PPM Center is configured. Configurators can use the PPM Workbench to define workflows, create request types, set up automatic notifications, and a host of other tasks and procedures. *Figure 1-2* shows an example of the PPM Workbench. Chapter 3, *Using the PPM Workbench,* on page 61, discusses the PPM Workbench and how to navigate it in greater detail.

Figure 1-2. PPM Workbench



Your view of PPM Center is determined by your level of access to features and data, which is set by your system administrator. The set of pages, portlets, and fields that you see may be different from another user's, depending on the level of access provided to you.

Web Pages

The PPM Center standard user interface appears as a set of specialized Web pages that open in a Web browser and offer you a customized view into PPM Center. From these pages, you can run reports, create requests, search for packages, and accomplish many other tasks. *Figure 1-3* shows a typical page.

Figure 1-3. PPM Center page

The PPM Center has the following components:

- **PPM Dashboard.** The PPM Dashboard is at the heart of the standard user interface. Using the PPM Dashboard, you can obtain accurate, up-to-the-minute status on your projects and deliverables. With the PPM Dashboard, project teams always know exactly where they stand. Managers gain real-time insight into progress and problems in projects under their purview. Executives can view all initiatives from an IT value perspective at a high level, ensuring alignment with the company's overall strategic direction.

- **Navigation path.** Above the PPM Dashboard is the navigation path. The navigation path lists the pages opened during the current PPM Dashboard session. Users can access previously visited pages by selecting entries on the navigation path.
- **Menu bar.** The menu bar presents a hierarchical organization of menus, submenus, and menu items. Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. Some links, like **Administration > Program Processes > Manage Issue Process,** open windows in the PPM Workbench.

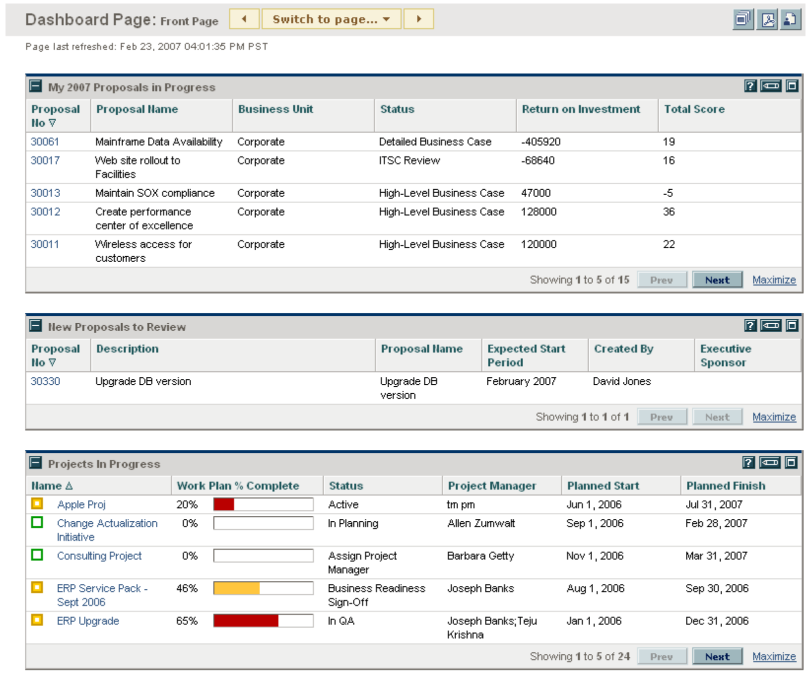
➤ If you have a pop-up blocker or download blocker active on your Web browser, you may have difficulties using the Web pages.

PPM Dashboard Pages

PPM Dashboard pages are a way of organizing application data. One PPM Dashboard page can be devoted to project information while another can be reserved for a PPM Center product, such as HP Demand Management or HP Portfolio Management. How you organize your data is entirely up to you.

At the top of each PPM Dashboard page is a label used to identify a PPM Dashboard page. *Figure 1-4* shows a PPM Dashboard page.

Figure 1-4. Typical PPM Dashboard page



PPM Dashboard pages can come from several different sources. Most of the time, you can pick and choose the PPM Dashboard page and its content, but not always. The following is a list of the different PPM Dashboard pages.

- **Default PPM Dashboard page.** The default PPM Dashboard page is the first PPM Dashboard page you see when you log on to PPM Center. For users who have personalized their PPM Dashboard, it is the first private page on the list; for new users, it is the first shared page on the list.

- **Private PPM Dashboard pages.** Private PPM Dashboard pages are created and configured by you. You can add portlets to a private page, move it up or down in the list of pages, or delete it.

- **Shared PPM Dashboard pages.** Shared PPM Dashboard pages are configured by your application administrator and published to one or many users. You cannot edit a shared PPM Dashboard page. Shared PPM Dashboard pages are created as modules. For detailed information on creating modules, see the *Creating Portlets and Modules* guide.

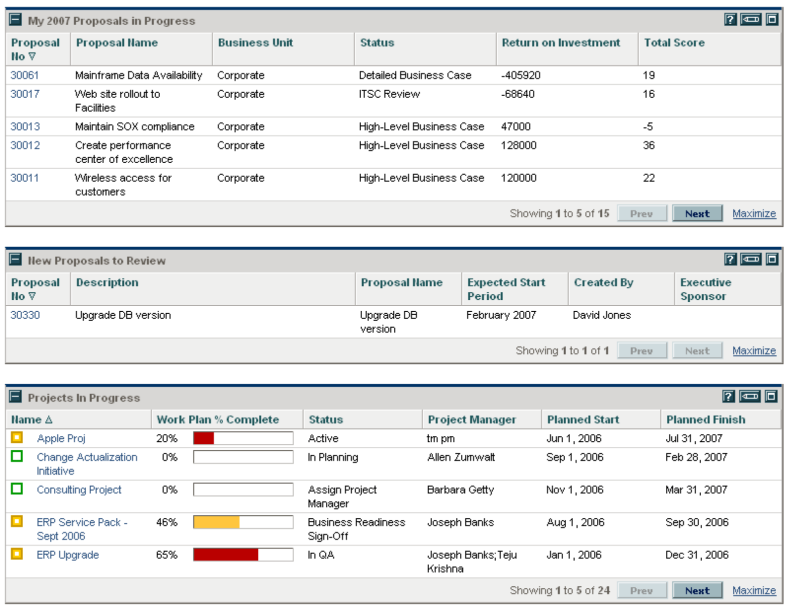
- **Blank pages.** Blank pages are PPM Dashboard pages without portlets. Once you add a blank PPM Dashboard page to your PPM Dashboard, you can configure the PPM Dashboard page to your specifications.

Portlets

Portlets reside on PPM Dashboard pages and display real-time data you want to see. Portlets are very configurable, allowing you to filter through all the data in the system, finding just what you need. There are two basic types of portlets:

- **List portlets.** List portlets present data in tabular form using rows and columns. *Figure 1-5* shows the Request List portlet.
- **Chart portlets.** Chart portlets present data in a graphical form, such as bar charts, pie charts, and bubble charts. *Figure 1-5* shows the Open Request By Priority chart portlet.

Figure 1-5. Typical portlets


My 2007 Proposals in Progress

Proposal No ▽	Proposal Name	Business Unit	Status	Return on Investment	Total Score
30061	Mainframe Data Availability	Corporate	Detailed Business Case	-405920	19
30017	Web site rollout to Facilities	Corporate	ITSC Review	-68640	16
30013	Maintain SOX compliance	Corporate	High-Level Business Case	47000	-5
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36
30011	Wireless access for customers	Corporate	High-Level Business Case	120000	22

Showing 1 to 5 of 15 Prev Next Maximize

New Proposals to Review

Proposal No ▽	Description	Proposal Name	Expected Start Period	Created By	Executive Sponsor
30330	Upgrade DB version	Upgrade DB version	February 2007	David Jones	

Showing 1 to 1 of 1 Prev Next Maximize

Projects In Progress

Name △	Work Plan % Complete	Status	Project Manager	Planned Start	Planned Finish
Apple Proj	20%	Active	tm pm	Jun 1, 2006	Jul 31, 2007
Change Actualization Initiative	0%	In Planning	Allen Zumwalt	Sep 1, 2006	Feb 28, 2007
Consulting Project	0%	Assign Project Manager	Barbara Getty	Nov 1, 2006	Mar 31, 2007
ERP Service Pack - Sept 2006	46%	Business Readiness Sign-Off	Joseph Banks	Aug 1, 2006	Sep 30, 2006
ERP Upgrade	65%	In QA	Joseph Banks;Teju Krishna	Jan 1, 2006	Dec 31, 2006

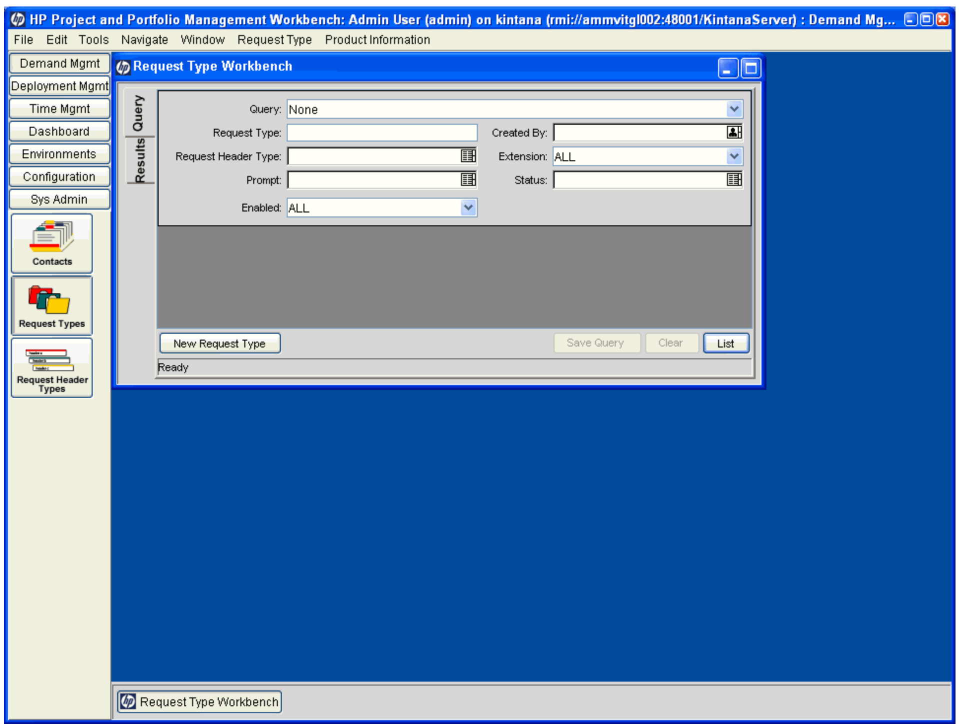
Showing 1 to 5 of 24 Prev Next Maximize

A portlet's edit page is where a portlet is personalized to meet your specific needs. Every portlet edit page has a **Preferences** section. The **Preferences** section is where you configure the filters for displaying data you want to see. If your portlet is a list portlet, you also have a **Choose Display Columns** section. The **Choose Display Columns** section lets you decide which columns will appear in the portlet.

PPM Workbench

For most PPM Center users, tasks are started and completed in the Web pages; some users, however, need to use the PPM Workbench for their work. The PPM Workbench is designed to help application administrators, configurators, and advanced users configure PPM Center. *Figure 1-6* shows the PPM Workbench.

Figure 1-6. PPM Workbench



The PPM Workbench opens in its own window, not in a Web browser window. You can open the PPM Workbench through the standard interface's **Administration > Open Workbench** menu item, or you might reach the PPM Workbench by creating packages.

The PPM Workbench has the following components (see *Figure 1-6*):

- **Workbench window.** Workbench windows are used to find and act on configuration entities, such as request types, object types, and workflows. Each configuration entity has its own unique Workbench window. You can reach a configuration entity Workbench window using the shortcut bar.

- **Shortcut bar.** The shortcut bar is used to organize the configuration entity Workbench windows. Each configuration entity Workbench window belongs to a screen group, such as **Demand Mgmt, Time Mgmt**, or

Configuration. When a screen group is selected, the associated Workbench windows are displayed as icons in the shortcut bar (see *Figure 1-6*).

- **Workbench menu.** The Workbench menu provides configuration functionality to the PPM Workbench. This includes such things as user profile settings and regional settings. In addition, some Workbench windows, such as packages, add an extra menu when that Workbench window is selected.

Viewing Product Information and Online Documentation

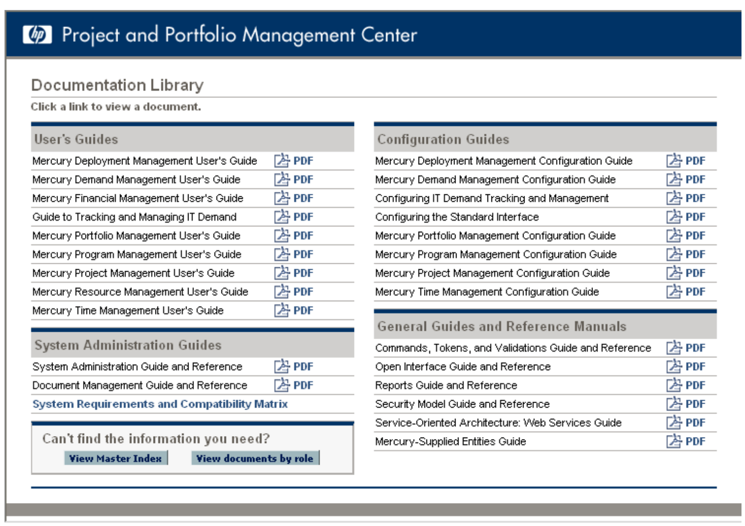
At the bottom of the menu bar is the **Product Information** menu. The **Product Information** menu provides you with access to the Documentation Library and About HP Project and Portfolio Management Center page.

Accessing Documentation

To find the available documentation:

1. Log on to PPM Center.
2. From the menu bar, select **Product Information > Library.**

   The Documentation Library opens.

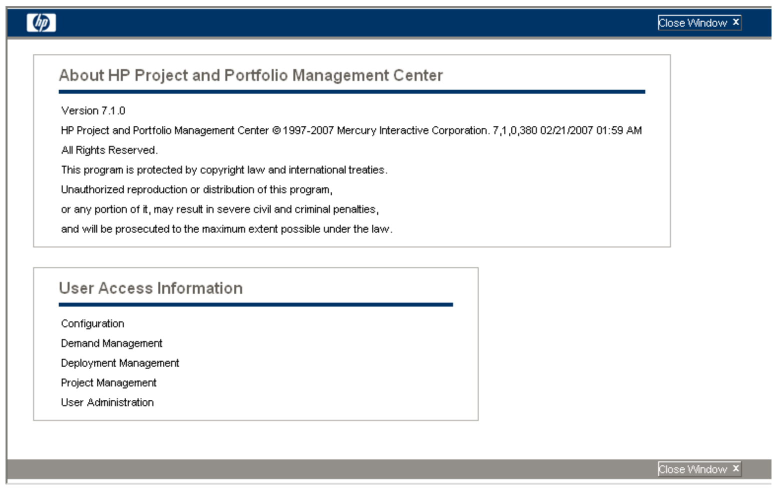


Viewing Version and User Access Information

To view the current version of the PPM Center, and to see the user access information:

1. Log on to PPM Center.
2. From the menu bar, select **Product Information > About HP Project and Portfolio Management Center.**

   The About HP Project and Portfolio Management Center page opens.



2 Using the Web Pages

In This Chapter:

Logging On and Off PPM Center

The set of PPM Center Web pages is accessed through a Web browser over a network. Before logging on, you must have the following:

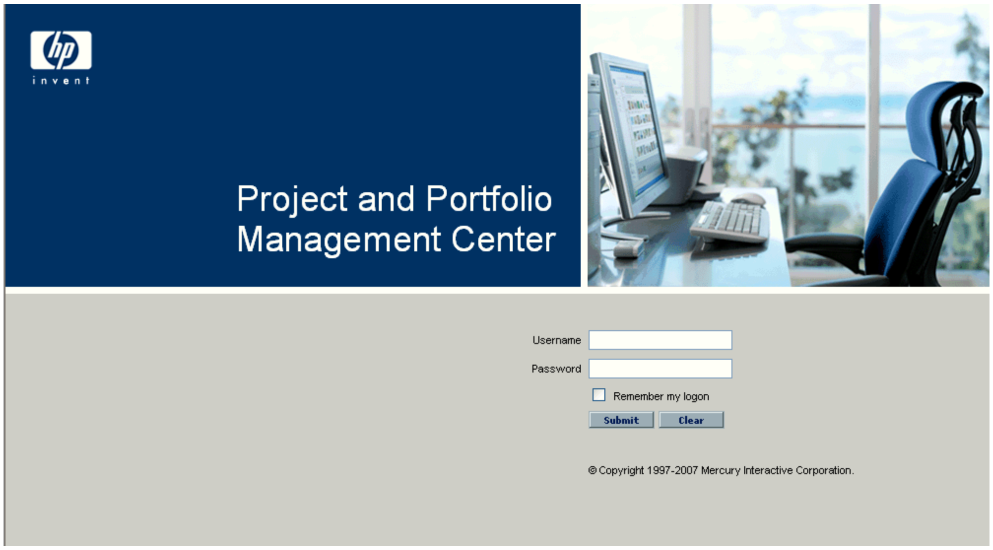
- PPM Center Web address (URL)
- A username
- A password
- At least one PPM Center product license

Logging On to PPM Center

To log on to the PPM Center:

1. From the Web browser, enter the PPM Center Web address.

   The PPM Center Logon page opens.



2. Enter your username and password in the appropriate fields.

   To have the server retain a password, select the **Remember my logon** checkbox. Once this checkbox is selected, you don't have to enter a password each time you log on.

3. On the PPM Center Logon page, click **Submit.**

   The Web pages open. First-time users might be prompted for a new password.

Project and Portfolio Management Center
SIGN OUT
Dashboard - Budget Portlets > Dashboard - Project Portlets > Dashboard - New Project Items > Dashboard - Front Page
Welcome, Admin User
Feb 23, 2007 04:05:13 PM PST
Last Login: 2/23/07 02:28 PM P
Expand All Collapse All
Dashboard
Front Page
Resource Management Port
Budget Portlets
Program Manager
My Personalized Page
Demand Manager
Project Portlets
New Project Items
Time Items
Work Breakdowns
Misc Program Items
Front Page (Standard ITG D
Personalize Dashboard
Demand Management
Project Management
Projects & Tasks
Staffing Profiles
Project Controls
Time Management
Resource Management
Program Management
Portfolio Management
Financial Management
Deployment Management
Reports
Administration
Product Information
Dashboard Page: Front Page
Switch to page...
Page last refreshed: Feb 23, 2007 03:56:01 PM PST
Request List
Req # | Request Type | Description | Status | Assigned To | Priority | Created By
30242 | Project Issue | No verification that upgrade requirements are in place. Need at least one resource for 5 working... | New | Finn Gill | High | Admin User
30218 | Project Issue | Usability testing | New | Bridget Holbrook | Normal | Admin User
30217 | Project Issue | Rewrite and distribute specifications | New | Barbara Getty | Normal | Admin User
30151 | Project Issue | We need another cube for contractors expected next month | New | | Normal | Joseph Banks
30150 | Project Issue | Company shutdown directly impacts delivery timeline | New | | Critical | Joseph Banks
Showing 1 to 5 of 7 Prev Next Maximize
Analyze Resource Pools
Preferences: Showing capacity from Resource Pools: Shared DBAs. Resource Pools and Staffing Profiles with Spe...
FTE's
14
12
10
8
6
4
2
0
02/07 03/07 04/07 05/07 06/07 07/07 08/07 09/07 10/07 11/07 12/07 01/08 02/08 03/08 04/08 05/08
4
Assigned Demand: Committed
Assigned Demand: Softbooked
Unmet Demand
Total Resource Capacity
Named Resource Capacity
View Data Table

Logging Off PPM Center

To log off PPM Center, in the upper-right corner of the page, click **Sign Out** (see *Figure 2-1*).

Figure 2-1. Logging off PPM Center

Expanding and Collapsing Menus

The menu bar presents a hierarchical organization of menus, submenus and menu items. Menus and submenus organize the menu items. Menu items are links to task-oriented pages, such as reports and searches. Some links, like **Administration > Program Processes > Manage Issue Process,** open windows in the PPM Workbench.

You can expand all of the menus to view every menu, submenu, and menu item. You can also collapse all of the menus, leaving only the menus visible.

- To expand all of the menus to view every menu, submenu, and menu item, click the **Expand All** button at the top of the menu bar.
- To collapse all of the menus, leaving only the menus visible, click the **Collapse All** button at the top of the menu bar.

Figure 2-2 shows the location of the **Expand All** and **Collapse All** buttons.

Figure 2-2. Expand All and Collapse All buttons

Hiding and Displaying the Menu Bar

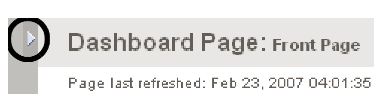
You can hide or display the menu bar, depending upon your preference.

- To hide the menu bar, click the **Hide Menu Bar** icon at the top of the menu bar (see *Figure 2-3*).

Figure 2-3. Hiding the menu bar

- Once the menu bar is hidden, you can display the menu bar by clicking the **Display Menu Bar** icon at the below the HP logo (see *Figure 2-4*).

Figure 2-4. Displaying the menu bar



Creating Requests, Packages, and Other Entities

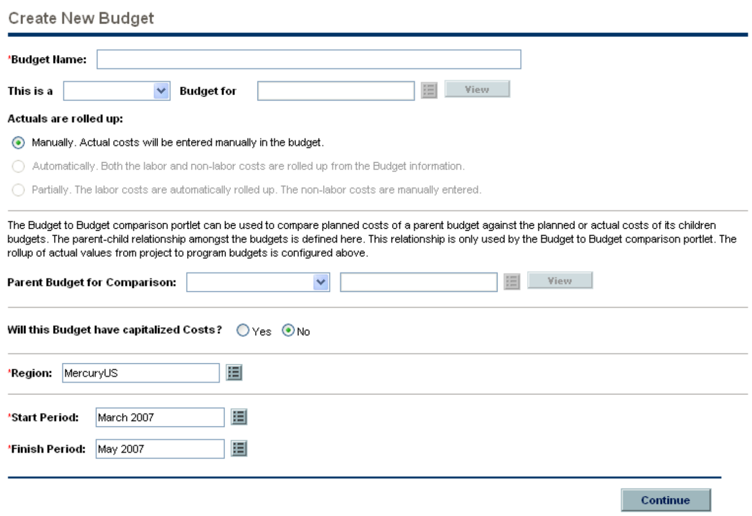
Entities are the requests and packages and projects and other objects you work with when using PPM Center. The entities you can create depend upon the access grants you have been given by the application administrator.

To create an entity:

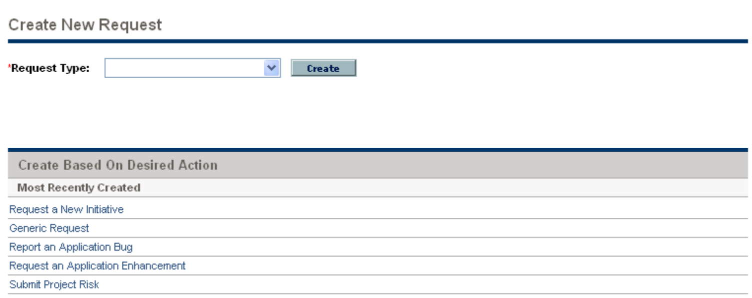
1. Log on to PPM Center.
2. From the menu bar, click the appropriate link for the product area you want.

   For example, to create a new request, click **Demand Management > Create a Request.** To create a new project, click **Project Management > Projects & Tasks > Create a Project.**

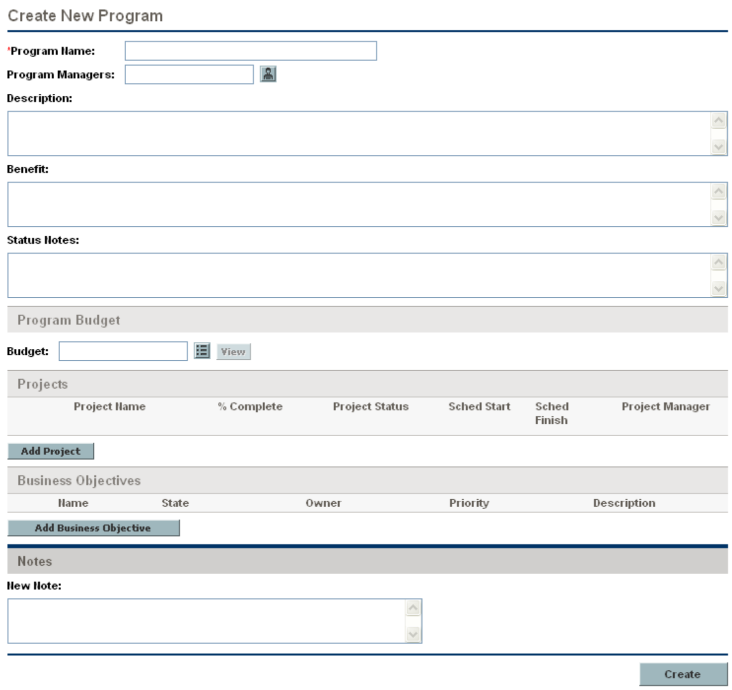
   The create page opens. The create page includes the fields associated with the entity type. Not all entities are alike. Some entities have a single entity type, such as budgets and skills.

   Some entities have multiple entity types, such as requests. For those entities, you must select the entity type before the create page opens.

Some entities, such as programs, require you to follow a process to create an entity. For those entities, you must complete the entire process to create the entity.



Searching for Requests, Packages, and Other Entities

Searches are used to find existing entities within PPM Center. Searching for entities does not use the PPM Center document management capabilities.

Running New Searches

To run a new search:

1. Log on to PPM Center.
2. From the menu bar, click the appropriate link in the product area you want to work in.

   For example, to search for requests, click **Demand Management > Search Requests.** To search for a project, click **Project Management > Projects & Tasks > Search Projects.**

   The Search Requests page opens. The search page includes the fields associated with the search type.
3. On the search page, fill in all the required parameters and any optional parameters and click **Search.**

   The Search Results page loads, displaying the results of your search.

Using the Query Builder

The Search Requests page includes the Query Builder, which you can use to build a detailed search query within a request type using Boolean operators.

For example, you could search for all Enhancement requests whose **Description** contains the words "Release Notes" and whose **Priority** is **Critical.**

In order for the Query Builder to be available, you must provide a single value in the **Request Type** field.

To use the Query Builder:

1. Log on to PPM Center.
2. From the menu bar, select **Demand Management > Search Requests.**

   The Search Requests page opens.
3. Provide a value for the **Request Type** field.

   The **Query Builder** button is enabled.

4. Click **Query Builder.**

   The Query Builder Search Terms window opens.

5. Click **Add.**

   The Add Query Builder Search Term window opens.

6. Specify a **Field,** a Boolean **Comparison Operator,** and the desired **Value** the field should have.

   ➤ The list of available options for the **Comparison Operator** depends on the type of **Field** specified.

7. Click **Done.**

   The term is added to the Query Builder Search Terms window. Click **Add Above** or **Add Below** to add more search terms to the query. You can also group search terms by selecting the checkbox in front of each term and clicking **Group** or **Ungroup.**

8. Click **Done.**

   The query is added to the **Additional Filters** section of the Search Requests page.

9. Click **Search** to run the search using the query you have built.

Saving Searches

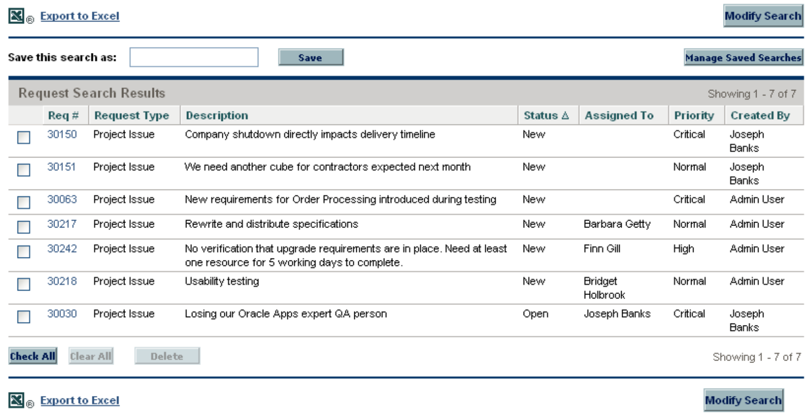
You can save and re-run commonly run searches for requests.

To save a search:

1. Log on to PPM Center.

2. Run a search.

   For instruction on how to run a search, see *Running New Searches*. The Search Results page loads, displaying the results of your search.



3. In the **Save this search as** field, enter a name for the search and click **Save.**

   A dialog window opens, displaying the results of the save.

   - Click **Manage Saved Searches** to go to the Manage Saved Searches page.
   - Click **Return to Search Results** to return to the search results.

Running Saved Searches

To run a saved search:

1. Log on to PPM Center.
2. On the menu bar, under **Demand Management > Saved Searches,** click on a saved search.

   The saved search is run. The Search Results page loads, displaying the results of your search.

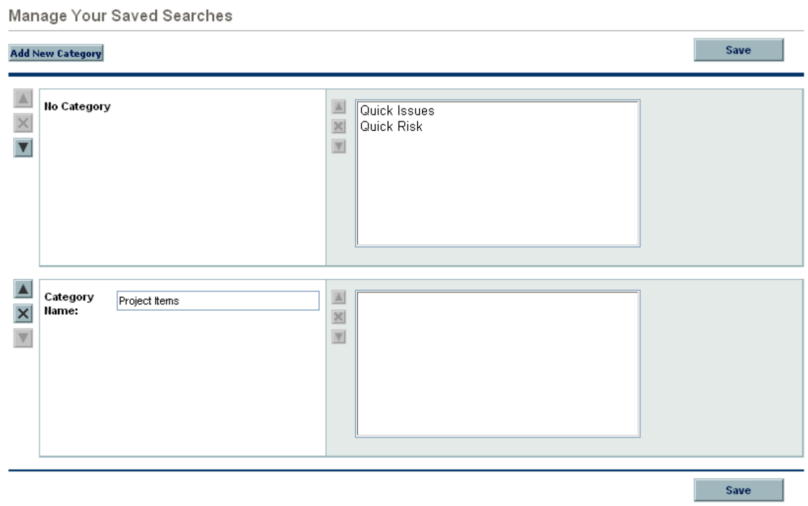
Managing Saved Searches

You can move between saved search categories and delete saved searches.

To manage a saved search:

1. Log on to PPM Center.
2. From the menu bar, select **Saved Searches > Manage Saved Searches.**

   The Manage Your Saved Searches page opens.



3. Move or delete a saved search.

- To move a saved search:

a. Select a saved search.

The **Move Arrow** and **Delete** icons for the selected saved search are enabled.

b. Click an enabled **Move Arrow** icon to move the saved search.

The selected saved search can move up or down in the category and move between categories.

c. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

- To delete a saved search:

a. Select a saved search.

The **Move Arrow** and **Delete** icons for the selected saved search are enabled.

b. Click the enabled **Delete** icon to delete the saved search.

The selected saved search is deleted.

c. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

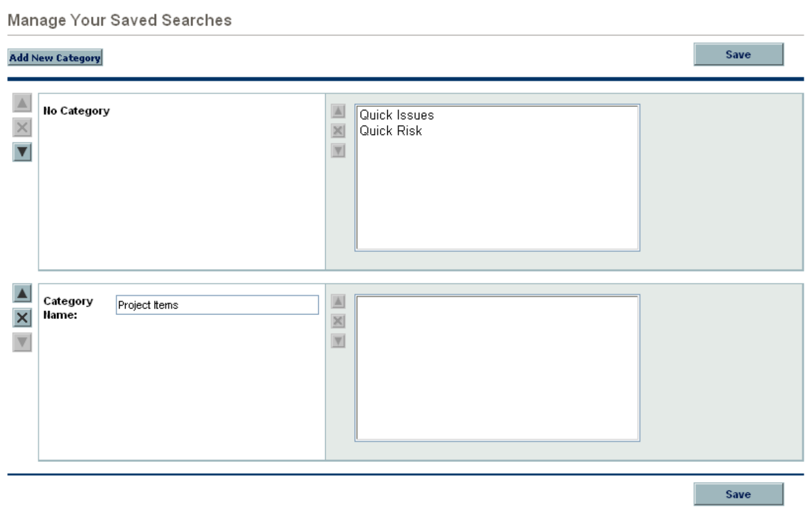
Managing Saved Search Categories

You can create, move, or delete saved search categories.

To manage a saved search category:

1. Log on to PPM Center.
2. From the menu bar, select **Searches > Manage Saved Searches.**

   The Manage Your Saved Searches page opens.



3. Create, move, or delete a saved search category.

   - To create a saved search category:

   a. On the Manage Your Saved Searches page, click **Add New Category.**

      A new category section opens.

   b. In the **Category Name** field of the new category section, enter the name of the new category and click **Save.**

      The new category is created and saved. When the category includes a saved search, the category will appear in the menu bar.

   - To move a saved search category:

   a. In a **Category** section to move, click a **Move Arrow** icon to move the category.

      The **Move Arrow** icons available to a category are always enabled.

b. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

- To delete a saved search category:

a. In a **Category** section to delete, click the **Delete** icon to delete the category.

When a **Delete** icon is enabled, the category can be deleted. If the **Delete** icon is not enabled, you cannot delete the category.

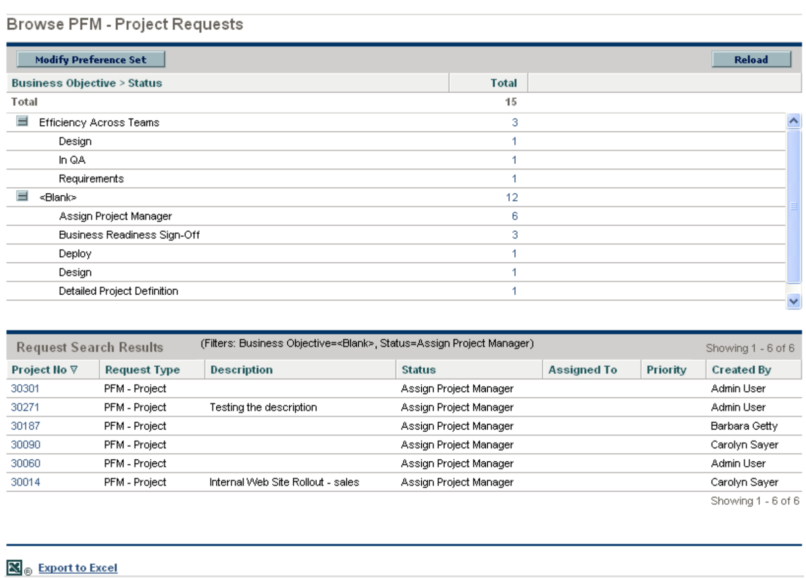
b. On the Manage Your Saved Searches page, click **Save.**

The changes to the Manage Your Saved Searches page are saved and the menu bar is updated.

Using the Request Browser

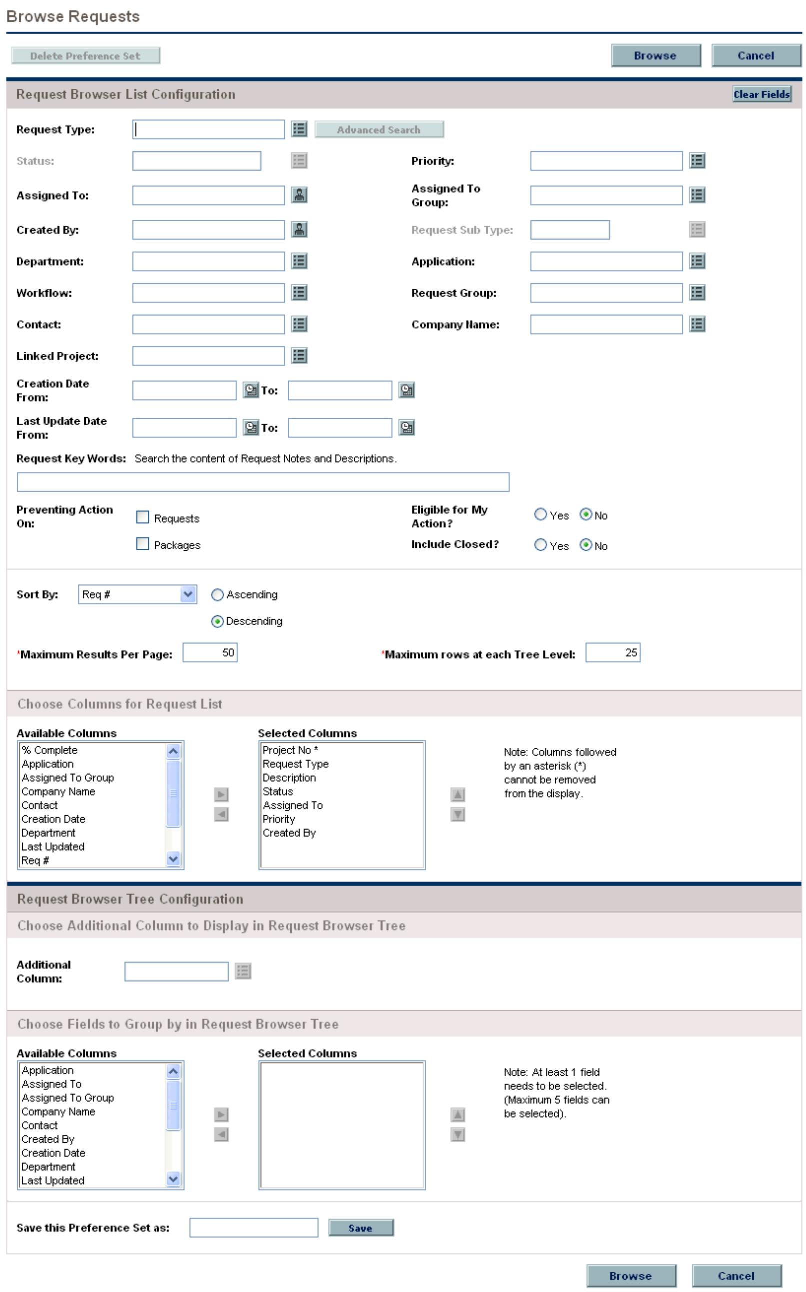
The Request Browser is another way to search for requests of a specific type. It allows you to view sets of requests hierarchically grouped by fields you specify. Each group can be expanded and easily listed by clicking on their numerical totals. *Figure 2-5* shows an example of the Request Browser's typical results.

Figure 2-5. Request Browser results



Access the Request Browser by selecting **Demand Management > Request Browser > Browse Requests** from the menu bar.

Figure 2-6. Request Browser search



Specify search criteria for the Request Browser the same way you would use the Search Requests page.

➤ You can only specify one **Request Type** in the Request Browser.

The following Request Browser features help to organize your results:

- **Choose Columns for Request List.** When you click the numerical totals in the Request Browser's hierarchy groups, the Request Browser displays those requests below the search results. Use this section to specify any additional request fields to display as columns below the results.
- **Choose Additional Column to Display in Request Browser Tree.** Use this section to determine any additional columns to display in the Request Browser.
- **Choose Fields to Group by in Request Browser Tree.** Use this section to specify the specific request fields that will determine the hierarchy into which the search results are arranged. This list can be rearranged.
- **Save this Preference Set as.** You can save the search criteria and preference sets you have entered, similar to saving searches in the Search Requests page. These searches can be re-run later.

Running Reports

PPM Center comes with a number of ready-to-run reports. Many of these reports can also be customized to meet your specific requirements.

For More Information

For information about specific reports, see the *Reports Guide and Reference*.

Running New Reports

To run a new report:

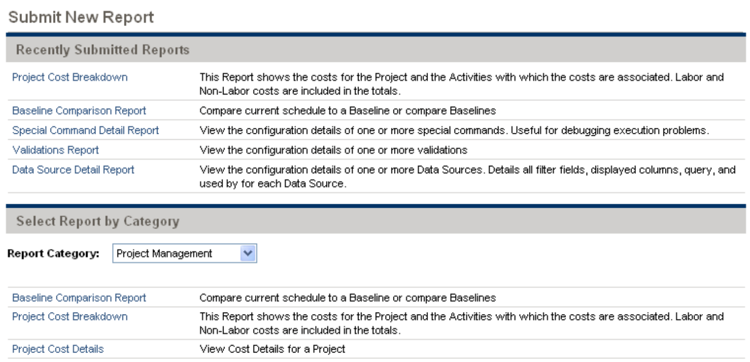
1. Log on to PPM Center.
2. From the menu bar, select **Reports > Create a Report.**

   The Submit New Report page opens.
3. Select a report.

   The following lists the ways in which to select a report:

   - In the **Recently Submitted Reports** section, select a report. The report's submission page opens.

- In the **Report Category** field, select a report category. The Submit New Report page is refreshed with the available reports. Select a report. The report's submission page opens.



4. On the report's submission page, fill in all the required filter fields, any optional filter fields, and click **Submit.**

   The Report Submitted page opens prior to the report.

Opening Existing Reports

Once a report is run, PPM Center saves that report, allowing you or others to view the report at a later date.

To open an existing report:

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

   The Search Reports page opens. The Search Reports page includes the fields associated with searching for an existing report. To view your saved reports, select **Reports > My Reports.**

3. On the Search Reports page, fill in all the required filter fields and any optional filter fields, and click **Search.**

   The Report Search Results page opens. All existing reports meeting the report search criteria are listed.

4. On the Report Search Results page, select the report.

   The previously run report is opened.

Changing Your Settings

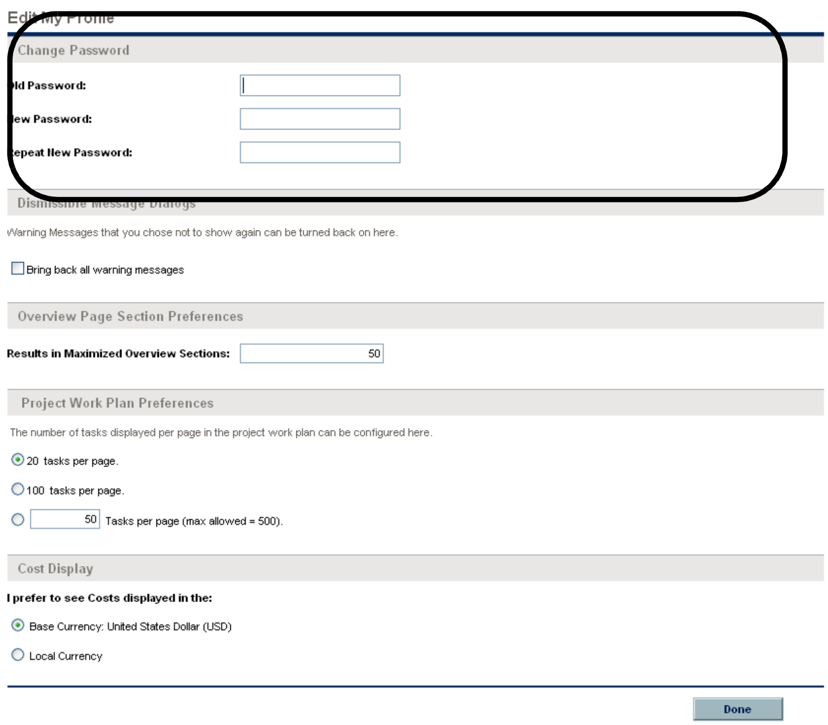
Using the **Administration** menu, you can adjust several interface settings to fit your own preferences. You can also change your password.

Changing Your Password

To change your password:

1. Log on to PPM Center.
2. From the menu bar, click **Administration > Edit My Profile.**

   Change your password in the **Change Password** section.

3. In the **Change Password** section, complete the fields and click **Done.**

   The new password is accepted.

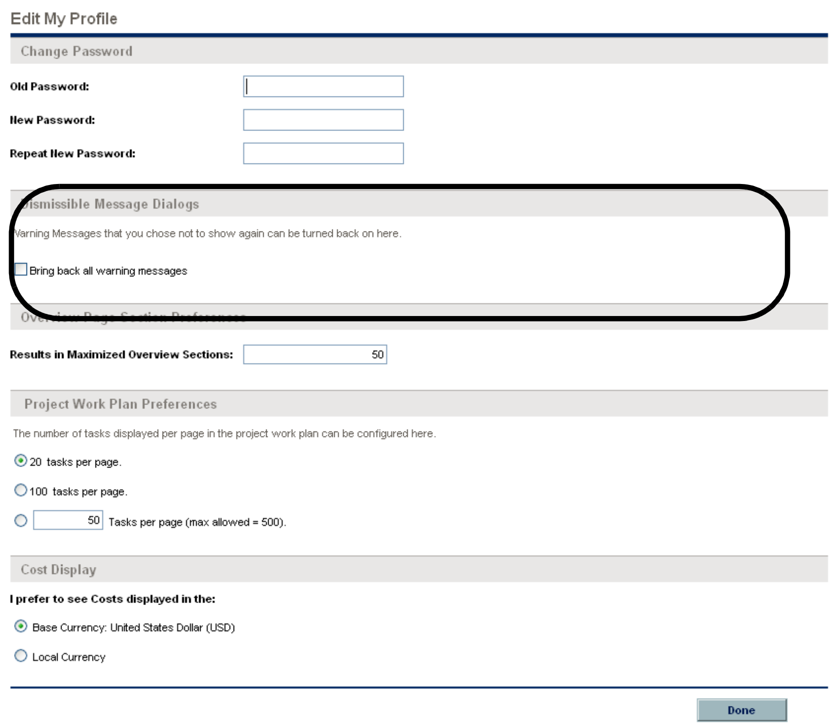
Setting Warning Message Display

As you use PPM Center, you may encounter warning messages that you can choose not to view again. You can reactivate these warning messages at any time.

To reactive warning messages:

1. Log on to PPM Center.
2. From the menu bar, click **Administration > Edit My Profile.**

   Change your warning message setting in the **Dismissible Message Dialogs** section.



3. In the **Dismissible Message Dialogs** section, select the **Bring back all warning messages** checkbox and click **Done.**

   Warning messages will display again.

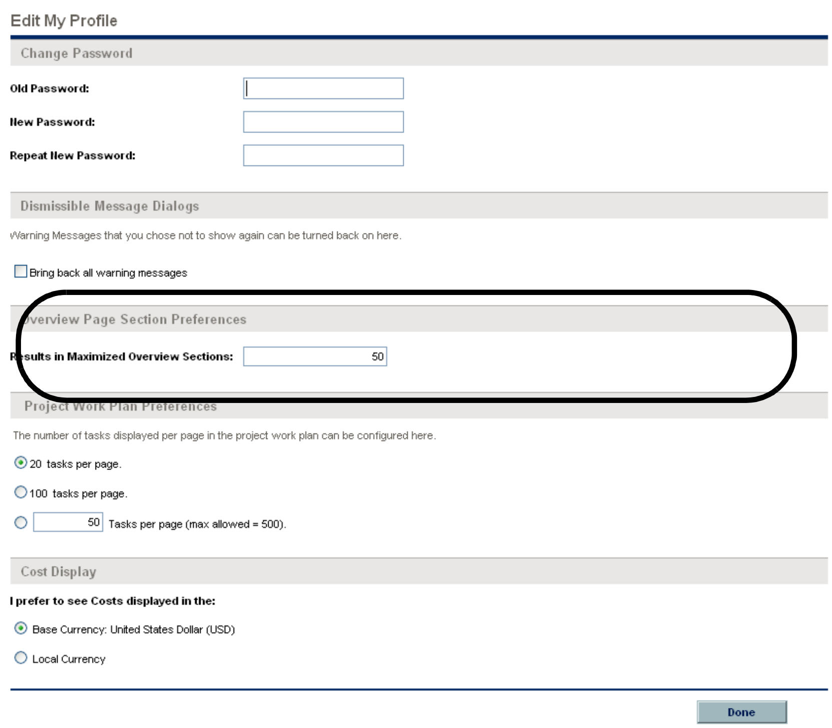
Setting Maximized Views for Portlets

A maximized view for a portlet displays more of the data gathered from the system than in the normal view. The number of rows displayed in the maximized view can be configured to be greater than in the normal view.

To change your portlet's maximized view setting:

1. Log on to PPM Center.
2. From the menu bar, click **Administration > Edit My Profile.**

   Change your portlet maximized view setting in the **Overview Page Section Preferences** section.



3. In the **Results in Maximized Overview Sections** field, enter the number of entries you want to see in a maximized view and click **Done.**

   The new portlet maximized view setting is accepted.

Setting Work Plan Page View Preferences

HP Project Management allows you to control the number of tasks in your work plan that can be displayed at one time, allowing you to efficiently manage your work plan regardless of whether you are working on a fast local LAN or a distributed network. You can change these settings in the Edit My Profile page. For more detailed information on these specific settings, see the *HP Project Management User's Guide.*

Setting Cost Displays

HP Financial Management allows the system to display cost data in different currencies. You can change your personal cost display setting in the Edit My Profile page. For more detailed information on these specific settings, see the *HP Financial Management User's Guide.*

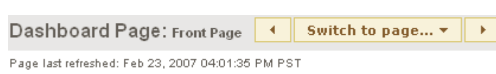
Using the PPM Dashboard

The PPM Dashboard collects data from the PPM Center and displays the data in real time. System data is organized using PPM Dashboard pages and portlets. Every PPM Dashboard has at least one PPM Dashboard page.

Opening PPM Dashboard Pages

Every PPM Dashboard can have one or more PPM Dashboard pages. Every PPM Dashboard page includes a label at the top of the PPM Dashboard page. To move from one PPM Dashboard page to another, click **Switch to page** and select the desired page (see *Figure 2-7*). You can also click the arrow icons to either side of **Switch to page** to move through PPM Dashboard pages sequentially.

Figure 2-7. Buttons for switching between PPM Dashboard pages



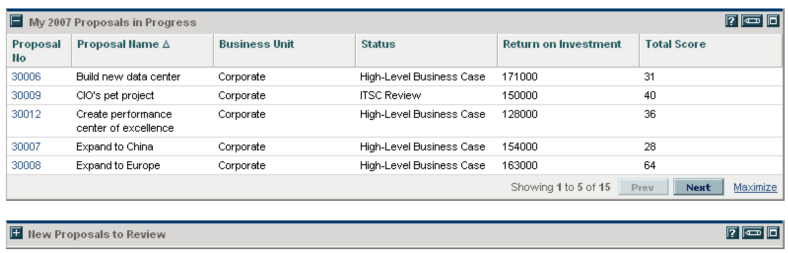
Setting Portlet Views

Portlets can be set to one of the following views:

- **Minimize view.** Only the portlet's title bar is visible. A portlet retains a minimized view between PPM Center sessions. To minimize a portlet, in the portlet's normal view, click the **Minimize** icon (see *Figure 2-8*).

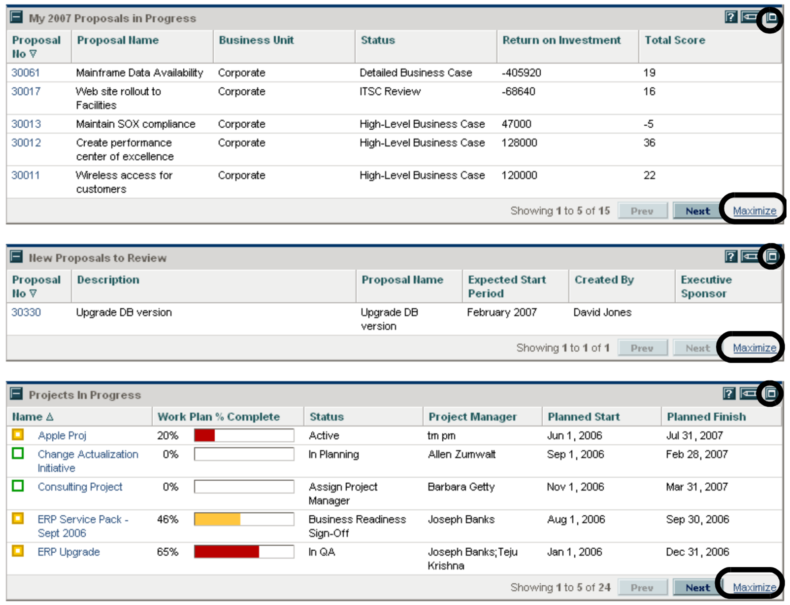
- **Normal view.** The default view of the portlet. For list portlets, the default rows and columns are visible in the portlet. For chart portlets, the chart or graph is visible. A portlet retains a normal view between PPM Center sessions. To return a minimized portlet to the normal view, in the portlet's minimized view, click the **Normal** icon (see *Figure 2-8*).

Figure 2-8. Normal and minimized views of portlets



- **Maximize view.** A maximized view of a portlet opens in a new page. A maximized view of a portlet contains more rows and columns than a portlet in a normal view. Maximized views of portlets are not retained between PPM Center sessions. To see a portlet's maximized view, in the portlet's normal view, click the **Maximize** icon (see *Figure 2-9*). To return a maximized view portlet to the normal view, in the portlet's maximized view, click **Back** (see *Figure 2-10*).

Figure 2-9. Portlet maximize icons



My 2007 Proposals in Progress

Proposal No	Proposal Name	Business Unit	Status	Return on Investment	Total Score
30061	Mainframe Data Availability	Corporate	Detailed Business Case	-405920	19
30017	Web site rollout to Facilities	Corporate	ITSC Review	-68640	16
30013	Maintain SOX compliance	Corporate	High-Level Business Case	47000	-5
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36
30011	Wireless access for customers	Corporate	High-Level Business Case	120000	22

Showing 1 to 5 of 15 Prev Next Maximize

New Proposals to Review

Proposal No	Description	Proposal Name	Expected Start Period	Created By	Executive Sponsor
30330	Upgrade DB version	Upgrade DB version	February 2007	David Jones	

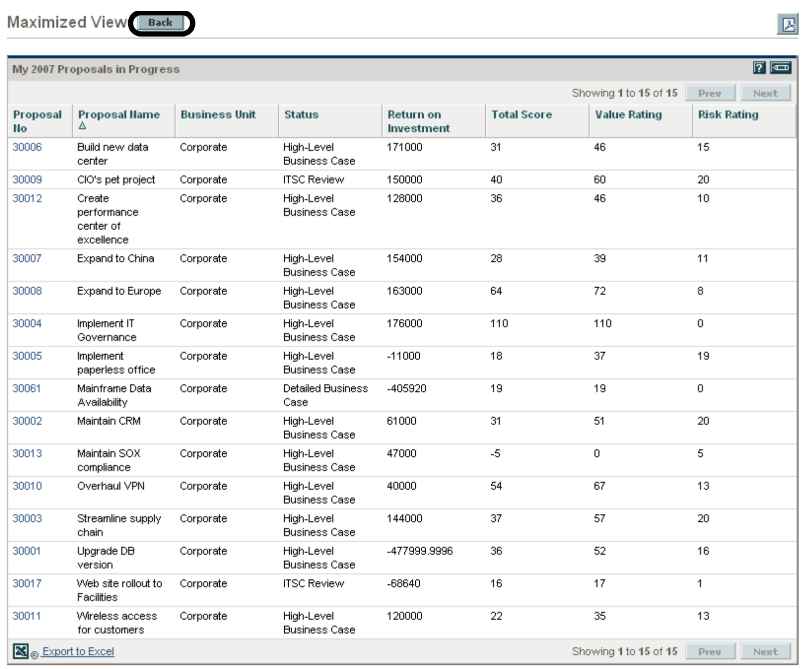
Showing 1 to 1 of 1 Prev Next Maximize

Projects In Progress

Name	Work Plan % Complete	Status	Project Manager	Planned Start	Planned Finish
Apple Proj	20%	Active	tm pm	Jun 1, 2006	Jul 31, 2007
Change Actualization Initiative	0%	In Planning	Allen Zumwalt	Sep 1, 2006	Feb 28, 2007
Consulting Project	0%	Assign Project Manager	Barbara Getty	Nov 1, 2006	Mar 31, 2007
ERP Service Pack - Sept 2006	46%	Business Readiness Sign-Off	Joseph Banks	Aug 1, 2006	Sep 30, 2006
ERP Upgrade	65%	In QA	Joseph Banks;Teju Krishna	Jan 1, 2006	Dec 31, 2006

Showing 1 to 5 of 24 Prev Next Maximize

Figure 2-10. Portlet maximized view



Maximized View Back

My 2007 Proposals in Progress

Showing 1 to 15 of 15 Prev Next

Proposal No	Proposal Name	Business Unit	Status	Return on Investment	Total Score	Value Rating	Risk Rating
30006	Build new data center	Corporate	High-Level Business Case	171000	31	46	15
30009	CIO's pet project	Corporate	ITSC Review	150000	40	60	20
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36	46	10
30007	Expand to China	Corporate	High-Level Business Case	154000	28	39	11
30008	Expand to Europe	Corporate	High-Level Business Case	163000	64	72	8
30004	Implement IT Governance	Corporate	High-Level Business Case	176000	110	110	0
30005	Implement paperless office	Corporate	High-Level Business Case	-11000	18	37	19
30061	Mainframe Data Availability	Corporate	Detailed Business Case	-405920	19	19	0
30002	Maintain CRM	Corporate	High-Level Business Case	61000	31	51	20
30013	Maintain SOX compliance	Corporate	High-Level Business Case	47000	-5	0	5
30010	Overhaul VPN	Corporate	High-Level Business Case	40000	54	67	13
30003	Streamline supply chain	Corporate	High-Level Business Case	144000	37	57	20
30001	Upgrade DB version	Corporate	High-Level Business Case	-477999.9996	36	52	16
30017	Web site rollout to Facilities	Corporate	ITSC Review	-68640	16	17	1
30011	Wireless access for customers	Corporate	High-Level Business Case	120000	22	35	13

Export to Excel Showing 1 to 15 of 15 Prev Next

Arranging Data in List Portlets

For list portlets, you can personalize the data gathered and the way the data is presented, using the portlet's edit page. However, you can temporarily change the way the data is presented using the portlet's **Sort** icon (see *Figure 2-11*).

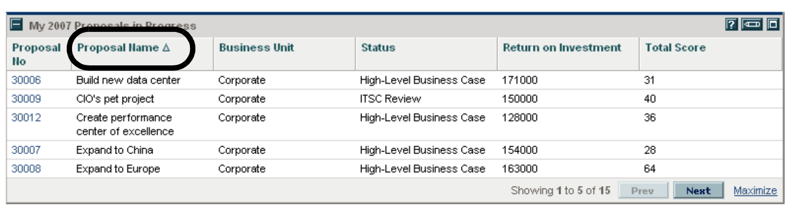
- To move the **Sort** icon from column to column, click on a column's heading. The **Sort** icon will move to that column. The data displayed in the portlet will then be sorted by that column.

Once you have selected the sort column, you can then select the order of the sort. When the **Sort** icon points up, the data is sorted in alphanumeric order from lowest (0 or A) at the top to highest (9 or Z) on the bottom. When the **Sort** icon points down, the data is sorted in alphanumeric order from highest (9 or Z) at the top to lowest (0 or A) on the bottom.

- To change the order of the sort, click a column heading containing the **Sort** icon. The **Sort** icon toggles from pointing up to pointing down, or from pointing down to pointing up.

Using the portlet's **Sort** icon to change the presentation of the data is valid only during the current PPM Center session.

Figure 2-11. Sort icon

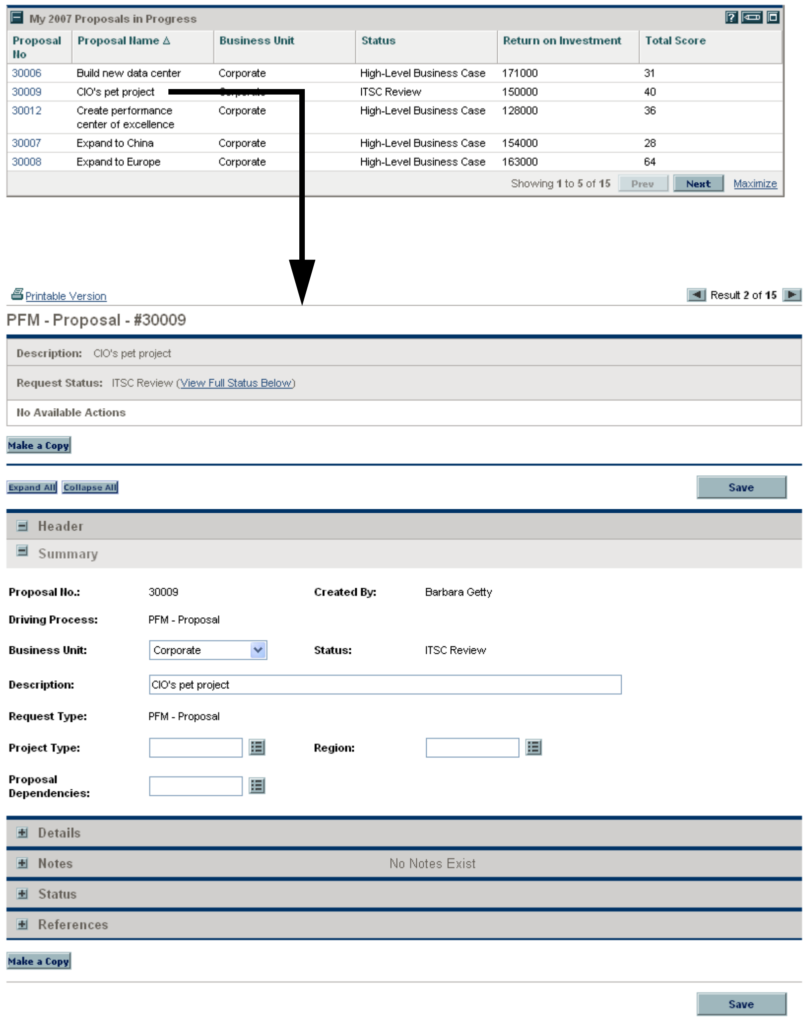


Drilling Down from Portlets

Drill-down pages contain additional, detailed or background information concerning a linked entry. Some drill-down pages contain portlets, which have their own linked entries and their own drill-down pages.

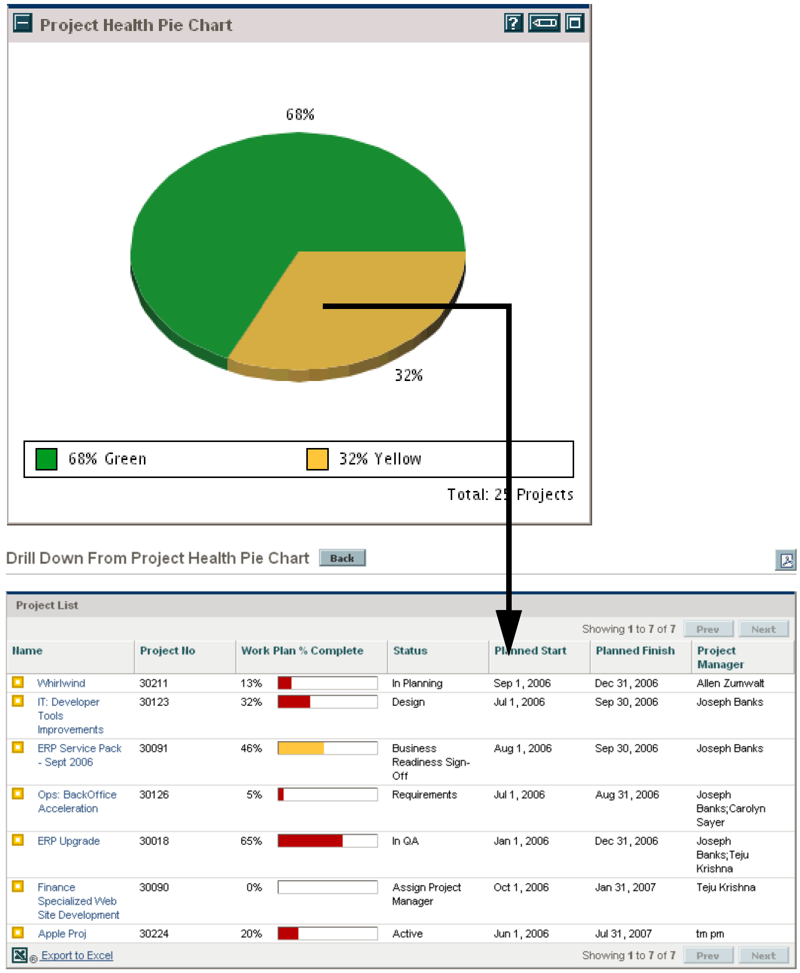
- To drill down from a list portlet, click on a linked entry.

Figure 2-12. Drilling down from a list portlet



■ To drill down from a chart portlet, click on a segment of the graph or legend.

Figure 2-13. Drilling down from a chart portlet

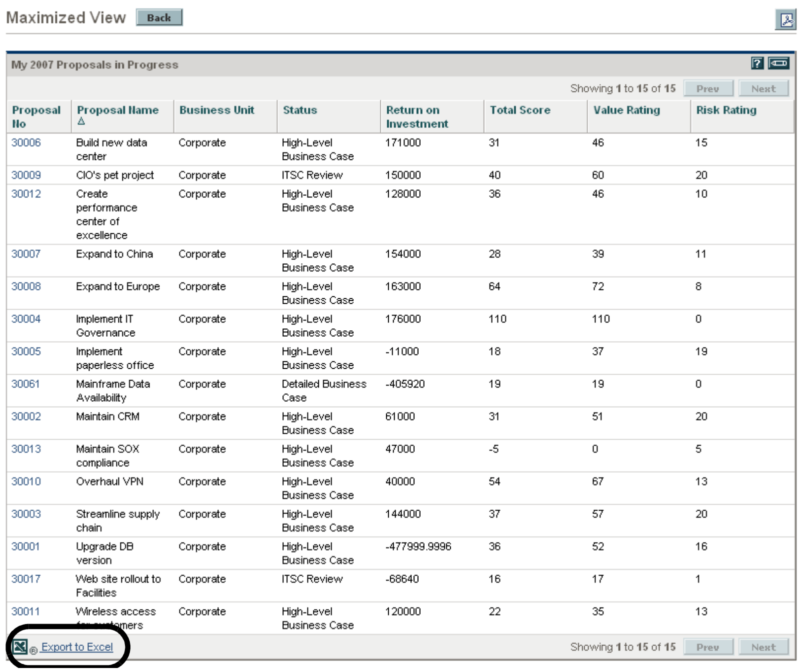


Exporting Data to Excel Spreadsheets

Data on a list portlet's maximized page can be exported to an Excel spreadsheet, if Microsoft® Excel is installed on your system.

■ To export data to an Excel spreadsheet, click the **Export Data to Excel** icon. A browser page is opened and the data is displayed in a Microsoft Excel spreadsheet. Once the data is imported into Microsoft Excel, all the standard Excel functions are available, including saving the file.

Figure 2-14. Exporting data to Excel



Proposal No	Proposal Name △	Business Unit	Status	Return on Investment	Total Score	Value Rating	Risk Rating
30006	Build new data center	Corporate	High-Level Business Case	171000	31	46	15
30009	CIO's pet project	Corporate	ITSC Review	150000	40	60	20
30012	Create performance center of excellence	Corporate	High-Level Business Case	128000	36	46	10
30007	Expand to China	Corporate	High-Level Business Case	154000	28	39	11
30008	Expand to Europe	Corporate	High-Level Business Case	163000	64	72	8
30004	Implement IT Governance	Corporate	High-Level Business Case	176000	110	110	0
30005	Implement paperless office	Corporate	High-Level Business Case	-11000	18	37	19
30061	Mainframe Data Availability	Corporate	Detailed Business Case	-405920	19	19	0
30002	Maintain CRM	Corporate	High-Level Business Case	61000	31	51	20
30013	Maintain SOX compliance	Corporate	High-Level Business Case	47000	-5	0	5
30010	Overhaul VPN	Corporate	High-Level Business Case	40000	54	67	13
30003	Streamline supply chain	Corporate	High-Level Business Case	144000	37	57	20
30001	Upgrade DB version	Corporate	High-Level Business Case	-477999.9996	36	52	16
30017	Web site rollout to Facilities	Corporate	ITSC Review	-68640	16	17	1
30011	Wireless access for customers	Corporate	High-Level Business Case	120000	22	35	13

About Excel Exports

Data from a list portlet's maximized page is exported as-is. Excel translates the data into the various formats with a few exceptions. The following is a list of those exceptions:

- Red, yellow, and green indicators translate into a shaded cell with a white **R, Y,** or **G** letter.
- Task exception indicators translate into a red exclamation mark.
- Milestone indicators translate into a black diamond character.
- Status bars export with the percentage number plus a percent (**%**) character.
- Currency values export with the currency sign, commas, and periods.
- Links to URLs export but are altered to open in a new Web browser page (instead of the current Web browser page).

Exporting PPM Dashboard Pages to PDF Files

PPM Dashboard pages can be exported as PDF files for use in presentations.

To export a PPM Dashboard page to a PDF file:

1. Open the PPM Dashboard page to export.
2. In the upper right-hand corner of the page, click the **Export Dashboard page to PDF** icon.

   The PDF Settings window opens.

3. Select the desired options for the following settings:
   - Display of the PPM Dashboard page
   - Paper size
   - Whether to open the PDF file in a browser window
   - Whether to leave the PDF Settings window open
4. Click **Export.**

   The PPM Dashboard page is exported to a PDF file that can be viewed and saved separately.

Cycling Through PPM Dashboard Pages Automatically

You can set the PPM Dashboard to automatically display all the pages in the **Dashboard** list one by one in a timed cycle. You can also set whether the pages cycle within the standard web pages, or take up the entire screen.

To set the PPM Dashboard to rotate through all its pages cyclically:

1. Log on to PPM Center.
2. In the upper right-hand corner of the page, click the **Page Rotation** icon.

   The Page Rotation dialog box opens.

3. Select the desired options for the following settings:
   - Time interval
   - Whether to display using the full screen
4. Click **Start.**

   The PPM Dashboard will begin displaying its pages one by one according to the specified timed cycle.

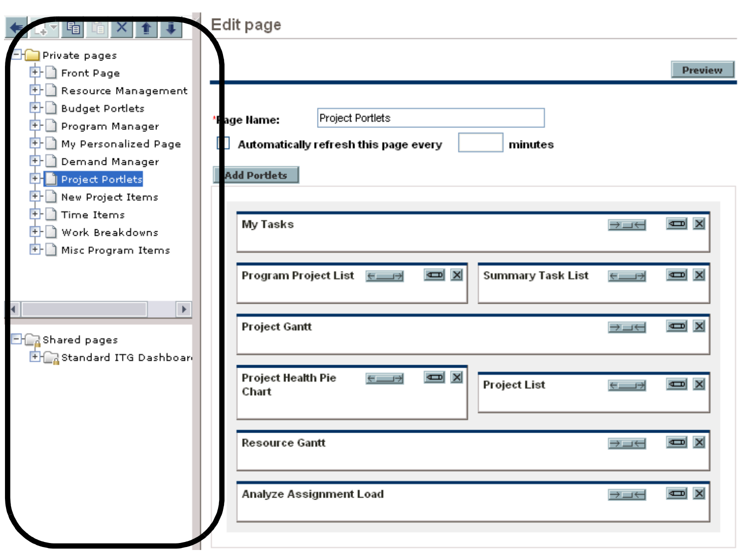
Personalizing the PPM Dashboard

Personalizing the PPM Dashboard refers to making changes to your PPM Dashboard and PPM Dashboard pages. To personalize the PPM Dashboard, you can do the following:

- Add PPM Dashboard pages
- Move and delete PPM Dashboard pages
- Rename PPM Dashboard pages
- Set the refresh rate for PPM Dashboard pages
- Add portlets to PPM Dashboard pages
- Copy and move portlets on PPM Dashboard pages
- Preview PPM Dashboard pages
- Add groups of PPM Dashboard pages

You can personalize your PPM Dashboard using the Personalize Dashboard page. Most actions on the Personalize Dashboard page are performed through in the area to the right of the menu bar, which can be collapsed or expanded.

Figure 2-15. Personalize PPM Dashboard page



The area to the right of the menu bar displays the PPM Dashboard pages currently being used, split into the following major categories:

- **Private pages.** These are PPM Dashboard pages you have created.
- **Shared pages.** These are PPM Dashboard pages that have been created by other users and made available for you to use.

Adding PPM Dashboard Pages

When adding PPM Dashboard pages, you can add:

- Blank PPM Dashboard pages
- Preconfigured PPM Dashboard pages

To add a PPM Dashboard page:

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

   The Personalize Dashboard page opens.

3. Add a PPM Dashboard page.
   - To add a blank PPM Dashboard page:

     a. Click **Private pages** in the area to the right of the menu bar.

     b. Click the **Add New** icon.

     c. Select **New Page.**

     A blank PPM Dashboard page is added to your PPM Dashboard.

   - To add a preconfigured PPM Dashboard page:

     a. Click **Private pages** in the area to the right of the menu bar.

     b. Click the **Add New** icon.

     c. Select **Add Preconfigured Pages.**

     A list of available preconfigured PPM Dashboard pages is displayed.

     d. Select a preconfigured PPM Dashboard page or pages and click **OK.**

     The page is added to your PPM Dashboard.

   The changes to your PPM Dashboard are automatically saved.

Copying, Moving, and Deleting PPM Dashboard Pages

PPM Dashboard pages can be copied, moved up or down in the list, or deleted entirely. To copy, move, or delete a PPM Dashboard page:

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

   The Personalize Dashboard page opens.

3. In the area to the right of the menu bar, select the PPM Dashboard page you want to move or delete.

   The **Copy** icon, available **Move Arrow** icons, and **Delete** icon are enabled in the area to the right of the menu bar for the PPM Dashboard page.

4. Copy, move, or delete the PPM Dashboard page.
   - To copy the PPM Dashboard page, click the **Copy** icon. The PPM Dashboard page is copied.
   - To move the PPM Dashboard page up or down in the list, click one of the enabled **Move Arrow** icons. The PPM Dashboard page is moved.
   - To delete the PPM Dashboard page, click the **Delete** icon. The PPM Dashboard page is removed.

   The changes to your PPM Dashboard are automatically saved.

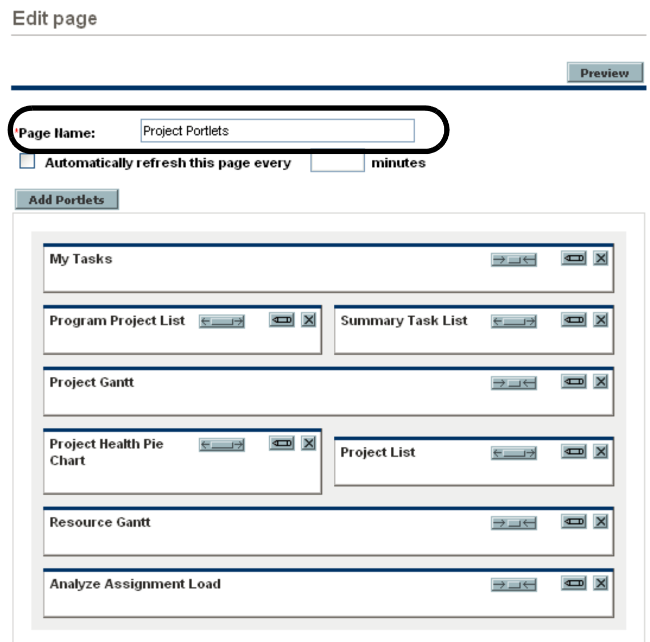
Renaming PPM Dashboard Pages

To rename a PPM Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to rename.

   The selected PPM Dashboard page is displayed in the Edit page.

4. In the Edit page, in the **Page Name** field, enter the new name of the PPM Dashboard page.



The changes to your PPM Dashboard are automatically saved.

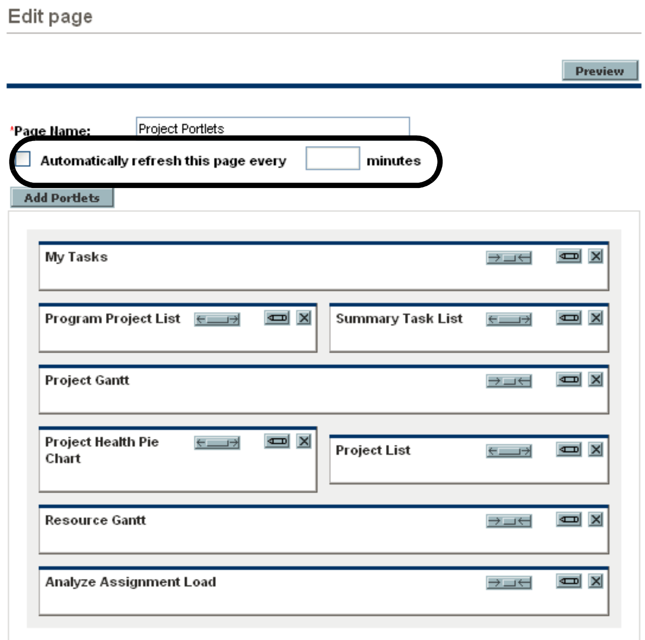
Setting Refresh Rates for PPM Dashboard Pages

To set the refresh rate for a PPM Dashboard page:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure.

   The selected PPM Dashboard page is displayed in the Edit page.
4. In the **Automatically refresh this page every minutes** field, select the checkbox and enter the number of minutes.

   The number entered in the field must be a whole number.



The changes to your PPM Dashboard are automatically saved.

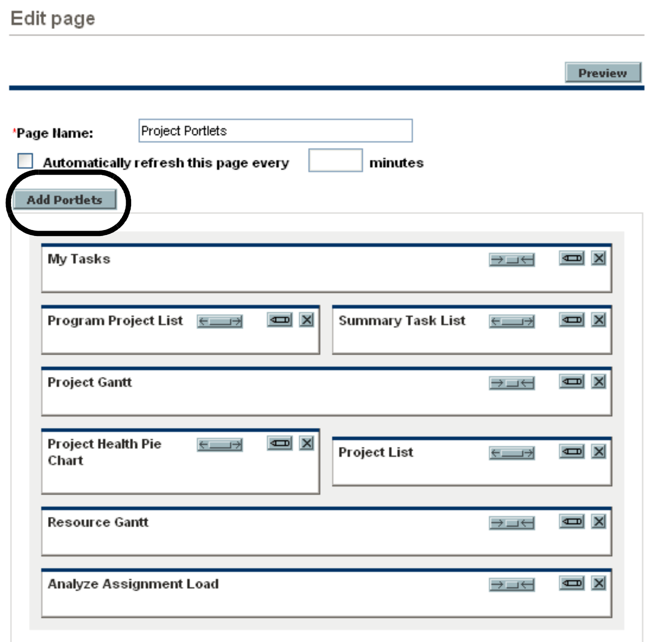
Adding Portlets to PPM Dashboard Pages

To add portlets:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure.

   The selected PPM Dashboard page is displayed in the Edit page.
4. On the Edit page, click **Add Portlets.**

   The Add Portlets to Dashboard Page opens.



5. Search for the portlets to add.

■ To list all of the portlets, click **Find Portlets.** The **Select Portlets to Add** section is added to the Add Portlets to Dashboard Page. The **Select Portlets to Add** section lists all of the portlets.

■ To list specific portlets:

a. In **Portlet Name,** enter all or part of the portlet's name.

b. In **Category,** select the portlet's category from the drop-down list.

c. Click **Find Portlets.**

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

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

The selected portlets are added to the PPM Dashboard page. The changes to your PPM Dashboard are automatically saved.

Copying and Moving Portlets on PPM Dashboard Pages

To copy and move portlets:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure.

   The selected PPM Dashboard page is displayed in the Personalize Dashboard page.
4. Select the portlet you want to move.

   The portlet is highlighted.
5. Copy or move the portlet.
   - To move the portlet around on the same PPM Dashboard page, hold the cursor down on the portlet and move the portlet to its new location (drag and drop).
   - To copy the portlet, select the portlet in the area to the right of the menu bar and click the **Copy** icon.
   - To move the portlet to another PPM Dashboard page, select the destination page in the area to the right of the menu bar and click the **Paste** icon.

   The changes to your PPM Dashboard are automatically saved.

Previewing PPM Dashboard Pages

You can preview a PPM Dashboard page during the personalization process, allowing you to view the PPM Dashboard page and its portlets as they would appear during normal usage with their filters operating as you configured them. To preview a PPM Dashboard page, click **Preview** in the Edit page. A new window opens, displaying the portlets in their current arrangement.

Working with Groups

You can arrange PPM Dashboard pages into groups for easy categorization. These groups can be expanded and collapsed in the menu bar.

To add a new group to the list of PPM Dashboard pages:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, click **Private pages.**
4. Click the **Add New** icon.
5. Select **New Group.**

   A new group page is added to your list of PPM Dashboard pages, and the Edit Group page opens.

6. In the **Group Name** field, enter a name for the new group.

   The group name will update automatically in the list of PPM Dashboard pages after you click away from the field.

7. Add new pages to the group as described in *Adding PPM Dashboard Pages* on page 50.

➤ While you can reorder PPM Dashboard pages within groups, you cannot move a PPM Dashboard page from one group to another. However, you can copy a PPM Dashboard page and paste it into other groups.

Personalizing Portlets

Personalizing portlets refers to making changes to your portlets. This includes the following:

- Deleting portlets
- Changing the size of portlets
- Setting the content and display of portlets

Deleting Portlets

To delete portlets:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure and click the **Edit** icon.

   The selected PPM Dashboard page is displayed in the Personalize Dashboard page.
4. On the portlet you want to delete, click the **Delete** icon.

   The portlet is deleted.

   The changes to your PPM Dashboard are automatically saved.

Changing the Size of Portlets

Portlets come in two sizes:

- **Wide.** One portlet per row.
- **Narrow.** Two portlets per row.

To change the width of portlets:

1. Log on to PPM Center.
2. From the menu bar, select **Dashboard > Personalize Dashboard.**
3. In the area to the right of the menu bar, select the PPM Dashboard page you want to configure and click the **Edit** icon.

   The selected PPM Dashboard page is displayed in the Personalize Dashboard page.

4. Change the size of the portlet.

   - On narrow portlets, click the **Portlet Wide** icon.

   - On wide portlets, click the **Portlet Narrow** icon.

   The changes to your PPM Dashboard are automatically saved.

Configuring Portlets

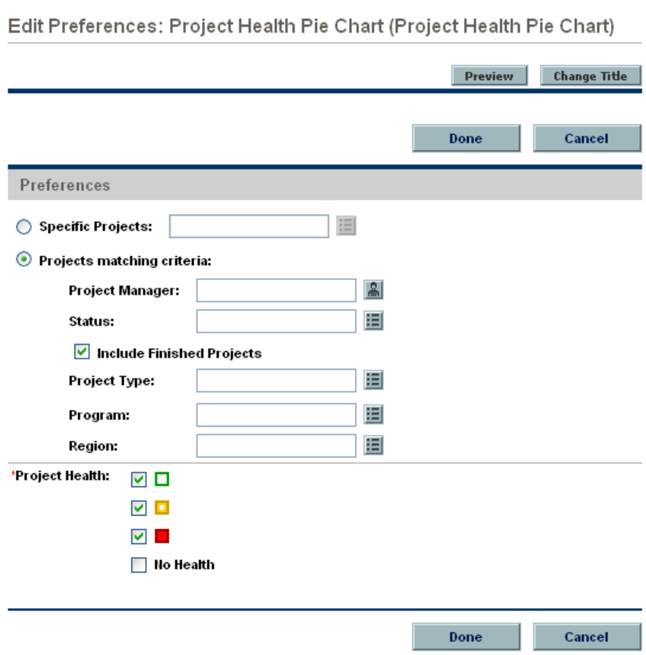
You can configure your portlets, both in terms of data content and in terms of the display of the data. Use a portlet's edit page to personalize a portlet to best fit your business needs.

To configure a portlet:

1. Log on to PPM Center.

2. On the portlet, click the **Edit** icon.

   The portlet's edit page displays.



3. Personalize your portlet.

   Each portlet is unique. All portlets have a portlet edit page but not all portlets have all of the listed sections. For example, chart portlets do not have a **Choose Display Columns** section. The following lists the different ways you can personalize your portlet:

   - **Title.** You can change the name of the portlet. Click **Change Title** to open the Change Title page.
   - **Preferences.** You can configure the filters that are used to capture and display the data you want. Select the filters that best fit your business need.
   - **Choose display columns.** You can configure how to display the data in the portlet. The **Available Columns** field lists all of the columns available to be displayed but not chosen. The **Displayed Columns** field lists all columns the will be displayed in the portlet's normal view. The **Additional Columns Displayed in Maximize View** field lists the additional columns that will be displayed in the portlet's maximized view. To move entries between fields, select an entry and click one of the enabled **Move Arrow** icons.
   - **Display options.** You can configure how to display the data. Select the options that best suit your business need.
   - **Arrange data.** You can configure how to display the data. Select the options that best suit your business need.

4. In the portlet edit page, click **Done.**

   The changes to the portlet are saved.

Using the Query Builder for Portlets

Request-related portlets include the Query Builder, which allows you to build a detailed search query within a request type using Boolean operators.

For example, you could search for all Enhancement requests whose **Description** contains the words "Release Notes" and whose **Priority** is **Critical.**

For more details on using the Query Builder, see *Using the Query Builder* on page 29.

3 Using the PPM Workbench

In This Chapter:

Opening and Closing the PPM Workbench

The PPM Workbench is accessed through the menu bar to the left of PPM Center's standard Web pages.

➤ If you have a pop-up blocker or download blocker active on your Web browser, you may have difficulties opening the PPM Workbench.

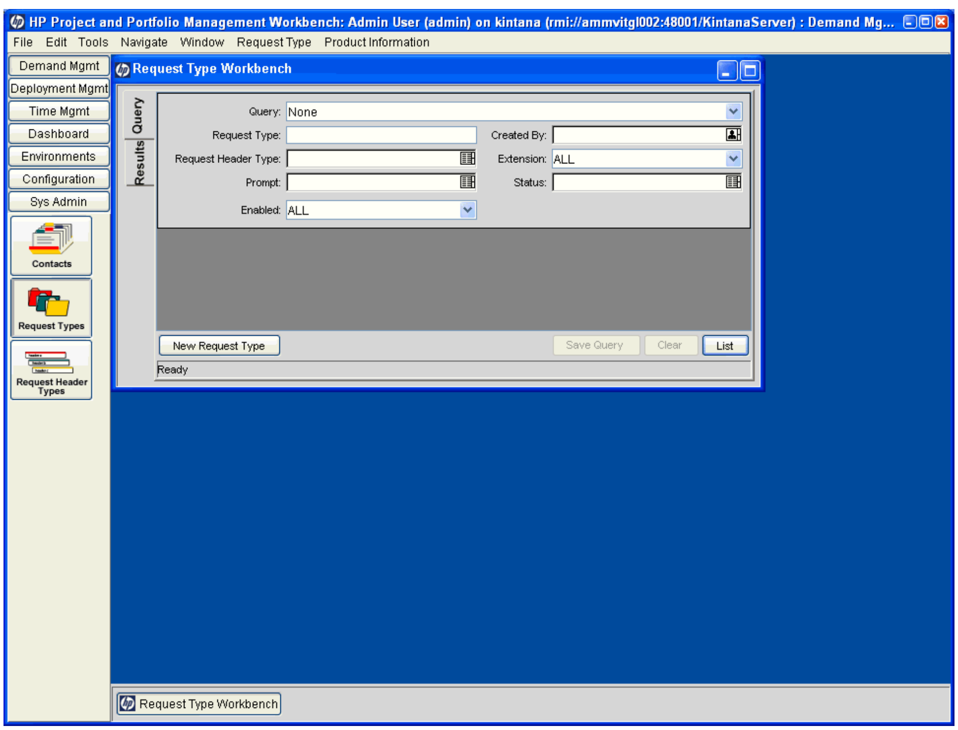
To open the PPM Workbench:

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

   A PPM Workbench status window opens. A few minutes later, the Warning Security window opens.

3. In the Warning Security window, select **Yes.**

   The PPM Workbench opens.



To close the PPM Workbench:

1. From the **Workbench** menu, select **File > Exit.**

   The PPM Workbench closes.

Searching for Entities

The PPM Workbench opens the default configuration entity Workbench window (typically the Package Workbench window). A configuration entity Workbench window gives you an interface to search for a specific entity, such as the Enhancement request type. To search for an entity, enter criteria in any combination of the fields in the **Query** tab and click **List.** All entities matching the search criteria will be listed in the **Results** tab. You can choose to ignore the filter fields and simply click **List,** which returns all of the entities in the Workbench window.

Saved Queries

Queries that are run frequently can be saved and re-run using the saved query functionality. When saving a query, the saved query is only available to the configuration entity Workbench window where you created the saved query. For example, a saved query in the Request Type Workbench window is not available in the User Data Workbench window.

Creating Saved Queries

To create a saved query:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

   The configuration entity Workbench window opens with the **Query** tab.
3. In the **Query** tab, enter the search criteria and click **Save Query.**

   The Save Query window opens.
4. In the Save Query window, in **Query Name,** enter a unique query name for the query and click **Save.**

   The query is saved.

Using Saved Queries

To use a saved query:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

   The configuration entity Workbench window opens with the **Query** tab.

3. In the **Query** tab, from the **Query** field, select a saved query name and click **List.**

   The query is run with the parameters of the saved search query.

Deleting Saved Queries

To delete a saved query:

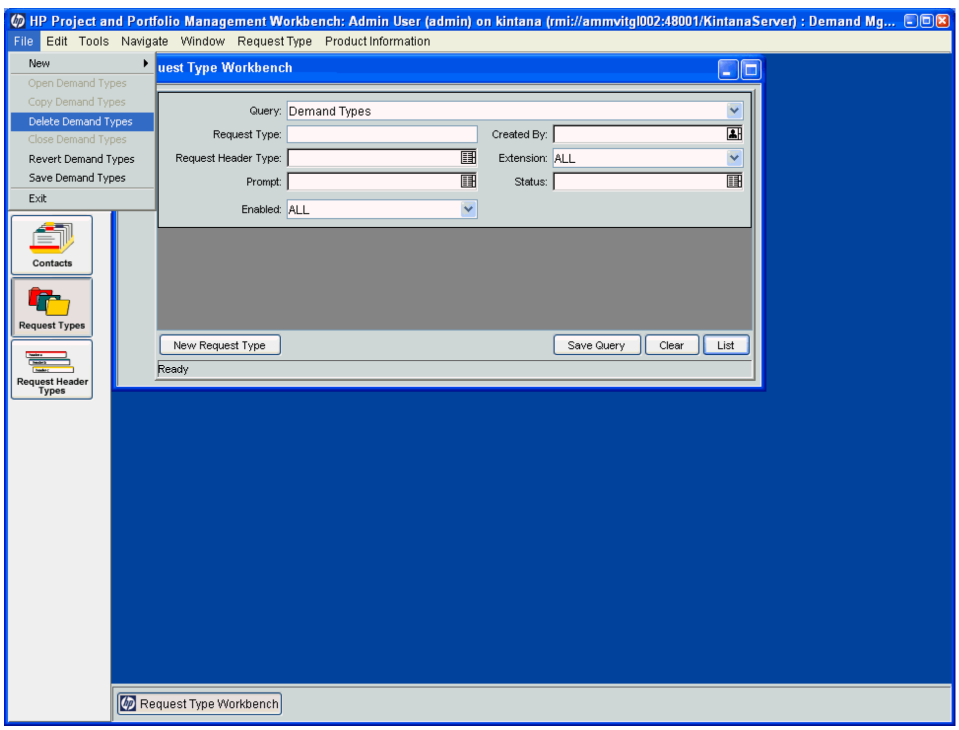
1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

   The configuration entity Workbench window opens with the **Query** tab.

3. In the **Query** tab, from the **Query** field, select a saved query name.

   The selected saved query is highlighted.

4. From the PPM Workbench menu, select **File > Delete <*Query*>** where **<*Query*>** is the name of the query to delete.



   A Question Dialog opens.

5. In the Question Dialog, click **Yes.**

   The saved query is deleted.

Case Sensitivity and Using Wildcards

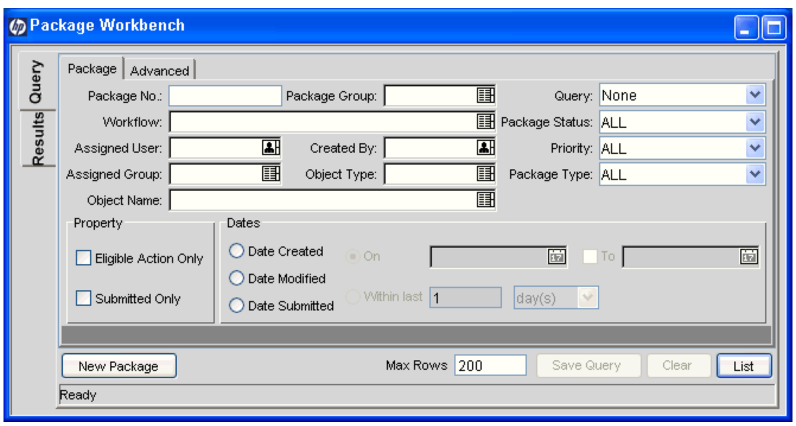
Filter fields are case insensitive. For example, entering the word **test** in a filter field would return **test, TEST,** and **Test.** Filter fields also return partial matches. For example, entering the word **test** in a filter field could return **Test Project** and **Testing Project.**

Filter fields also accept the wildcard character **%,** which matches against any character. For example, entering **%ample** in a filter field could return **Example** and **Sample.** However, simply entering **ample** in a filter field would not return **Example** and **Sample.**

Advanced Queries

The Package Workbench window **Query** tab includes the **Advanced** tab, where you can enter complex search criteria for packages (see *Figure 3-1*).

Figure 3-1. Package Workbench window

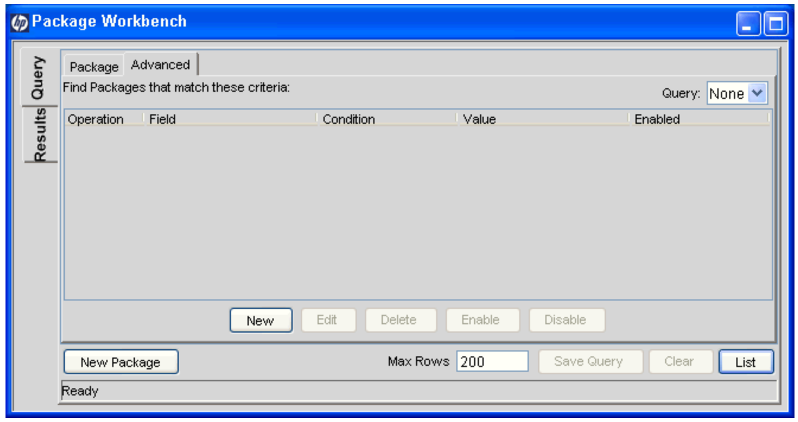


To enter advanced query criteria:

1. Open the PPM Workbench.
2. Select the Package Workbench window.

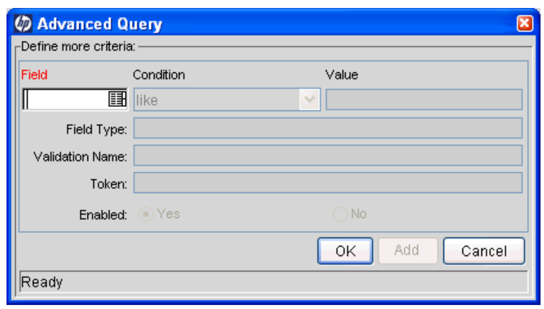
   The Package Workbench window opens with the **Query** tab. The **Package** tab of the **Query** tab is displayed.
3. In the **Package** tab, complete the search criteria and click the **Advanced** tab.

   The **Advanced** tab opens.



4. In the **Advanced** tab, click **New.**

   The Advanced Query window opens.



5. In the Advanced Query window, complete the filter fields and click **Add.**

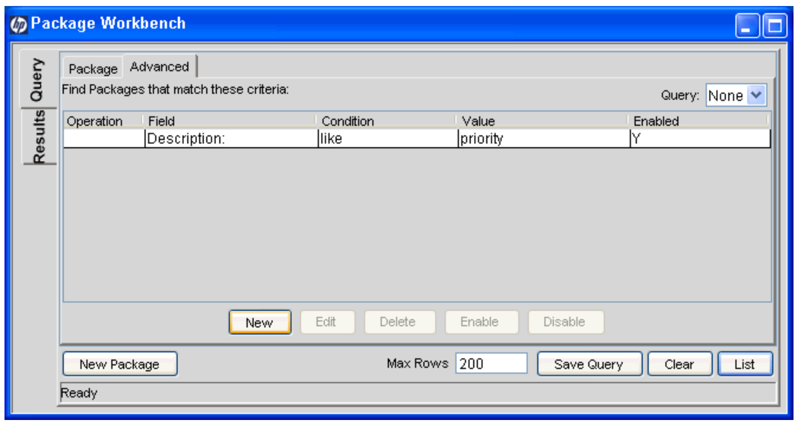
   See *Table 3-1* for the list of conditions. The advanced query logic is added to the query.

Table 3-1. Boolean operators (page 1 of 2)

Condition	Description
Like	Looks for close matches of the value to the contents of the selected field.
Not like	Looks for contents in the selected field which are not close matches to the value field.
Equal to	Looks for an exact match of the value to the contents of the selected field.
Not equal to	Returns all results which are not an exact match of the value to the contents of the selected field.
Is null	Returns all instances in which the selected field is blank.
Is not null	Returns all instances in which the selected field is not blank.

Table 3-1. Boolean operators (page 2 of 2)

Condition	Description
Greater than	Looks for a numerical value in excess of the value entered in the Value field.
Less than	Looks for a numerical value below the value entered in the Value field.
Greater than equal to	Looks for a numerical value in excess or the same as the value entered in the Value field.
Less than equal to	Looks for a numerical value below or the same as the value entered in the Value field.



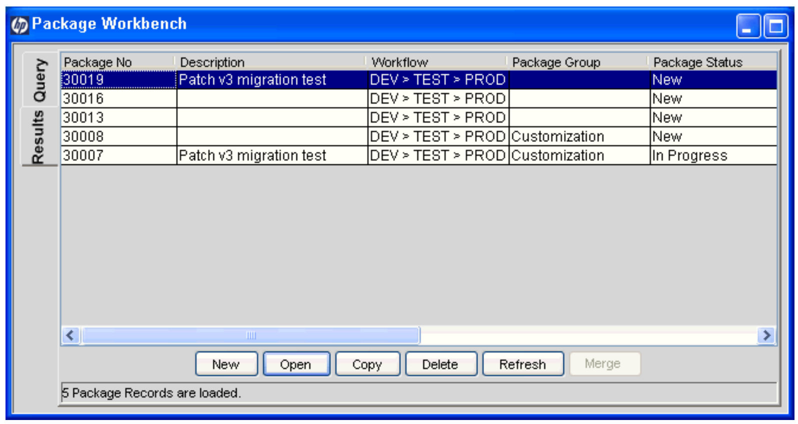
6. In the **Advanced** tab, click **List.**

   The search begins. When performing the search, PPM Center uses the search criteria specified on the **Package** tab. All matches are then filtered using the search criteria specified on the **Advanced** tab. Only packages matching all of the filter fields are displayed in the **Results** tab. If no matches are returned, you could be less restrictive by disabling or removing some of the search criteria.

Selecting Configuration Entities

The **Results** tab displays all of the configuration entities matching the search criteria. The results can be sorted on any of the fields by clicking the column header. In the **Results** tab, select any of the returned configuration entities (or a range of configuration entities) for viewing, copying, or modifying (see *Figure 3-2*).

Figure 3-2. Results tab



To select a contiguous group of configuration entities:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, enter the search criteria and click **List.**

   The results are displayed in the **Results** tab.
4. In the **Results** tab, select one entity.

   The entity is highlighted.
5. Hold down the **Shift** key and select another entity.

   All of the entities between the two select entities are highlighted.
6. Click **Open** or **Delete.**

   All of the highlighted entities are opened or deleted.

To select several separated entities:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, enter the search criteria and click **List.**

   The results are displayed in the **Results** tab.

4. In the **Results** tab, select one entity.

   The entity is highlighted.

5. Hold down the **Ctrl** key and select another entity.

   Both of the selected entities are highlighted.

6. Click **Open** or **Delete.**

   Both of the highlighted entities are opened or deleted.

The **Results** tab also provides buttons for executing other common tasks. From the **Results** tab, users can create **New** entities, **Open**, **Copy,** or **Delete** existing entities, or re-run the query by clicking **Refresh.**

Opening, Deleting, and Copying Entities

To open, delete, or copy an entity:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, enter the search criteria and click **List.**

   The results are displayed in the **Results** tab.

4. In the **Results** tab, select an entity.

   The entity is highlighted.

5. Open, delete, or copy the entity.

   - To open the entity, in the **Results** tab, click **Open.**
   - To delete the entity, in the **Results** tab, click **Delete.** A question dialog opens, asking if you want to delete the entity.
   - To copy the entity, in the **Results** tab, click **Copy.** A copy dialog window opens, asking for a name for the new (copied) entity.

Creating New Entities

To create a new entity:

1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.
3. In the **Query** tab, click **New *<Entity_Type>***, where ***<Entity_Type>*** is the type of entity, such as **New Package.**

   The entity's detail window opens.

4. In the detail window, complete the fields as required and click **OK.**

   The entity is created.

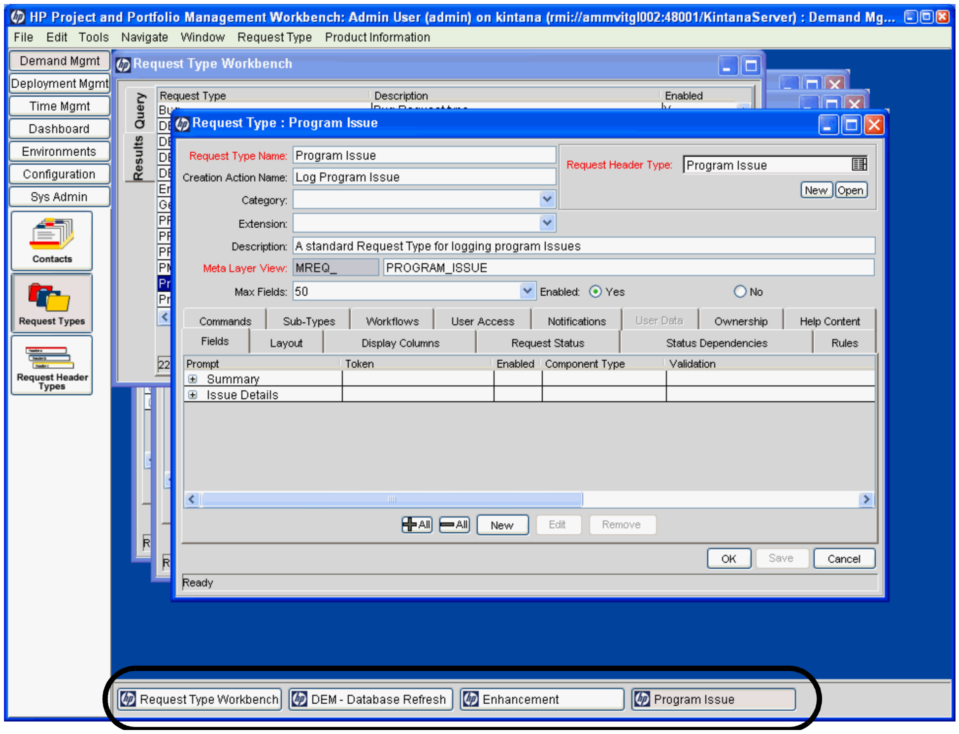
Navigating Among Workbench Windows

In the PPM Workbench, the shortcut bar is typically used to navigate to a configuration entity Workbench window. You can also navigate the PPM Workbench using the **Navigate** menu on the PPM Workbench menu.

Every Workbench window has a **Query** tab, which is used to search PPM Center for entities associated with the Workbench window. The results of a **Query** tab search are listed in the Workbench window's **Results** tab. Toggle between the **Query** tab and **Results** tab using the tabs in the upper-left corner of the Workbench window (see *Figure 3-3*).

When multiple detail windows are open, an individual detail window can be accessed using the buttons at the bottom of the PPM Workbench, as shown in *Figure 3-3*. If you minimize a detail window, or even a Workbench window, you can view the window by clicking the appropriate button at the bottom of the PPM Workbench.

Figure 3-3. Navigating among multiple open detail windows



4 What's Next

After This Document

Now that you've read this document, you should be better able to get around the PPM Center Web pages and the PPM Workbench.

But now what?

You can access the PPM Center Documentation Library by selecting **Product Information > Library** from the menu bar in the PPM Center Web pages. The Documentation Library contains PPM Center documentation in PDF form arranged by the following categories:

- User's Guides
- Configuration Guides
- System Administration Guides
- General Guides and Reference Manuals

You should also be ready to learn to use PPM Center in greater detail, according to the role you play in your organization. Click **View documents by role** in the Documentation Library page to view PPM Center documentation arranged by roles such as:

- Portfolio Manager
- Project Manager
- Time Approver

To view the *Master Index* of all topics in the PPM Center documentation, click **View Master Index** in the Documentation Library page.

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