

# HP Project and Portfolio Management Center

Software Version: 7.1

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## Getting Started

Document Release Date: March 2007  
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- 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

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- Look up HP support contacts
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# 1 Introduction

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## In This Chapter:

- *Overview of HP Project and Portfolio Management Center*
    - *Web Pages*
    - *PPM Workbench*
  - *Viewing Product Information and Online Documentation*
    - *Accessing Documentation*
    - *Viewing Version and User Access Information*
-

# 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.

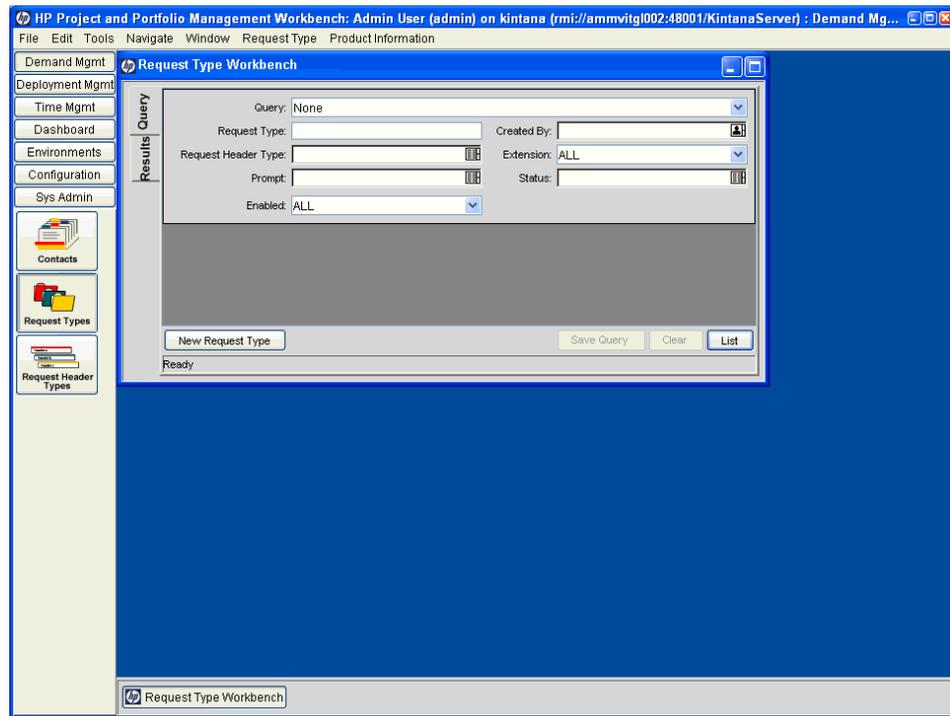
Most PPM Center users work in the standard user interface, which appears as a collection of specialized Web pages. These pages open in a Web browser and offer you a customized view into PPM Center. From these pages, you can run reports, submit requests, and create projects, among other things. Most importantly, 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

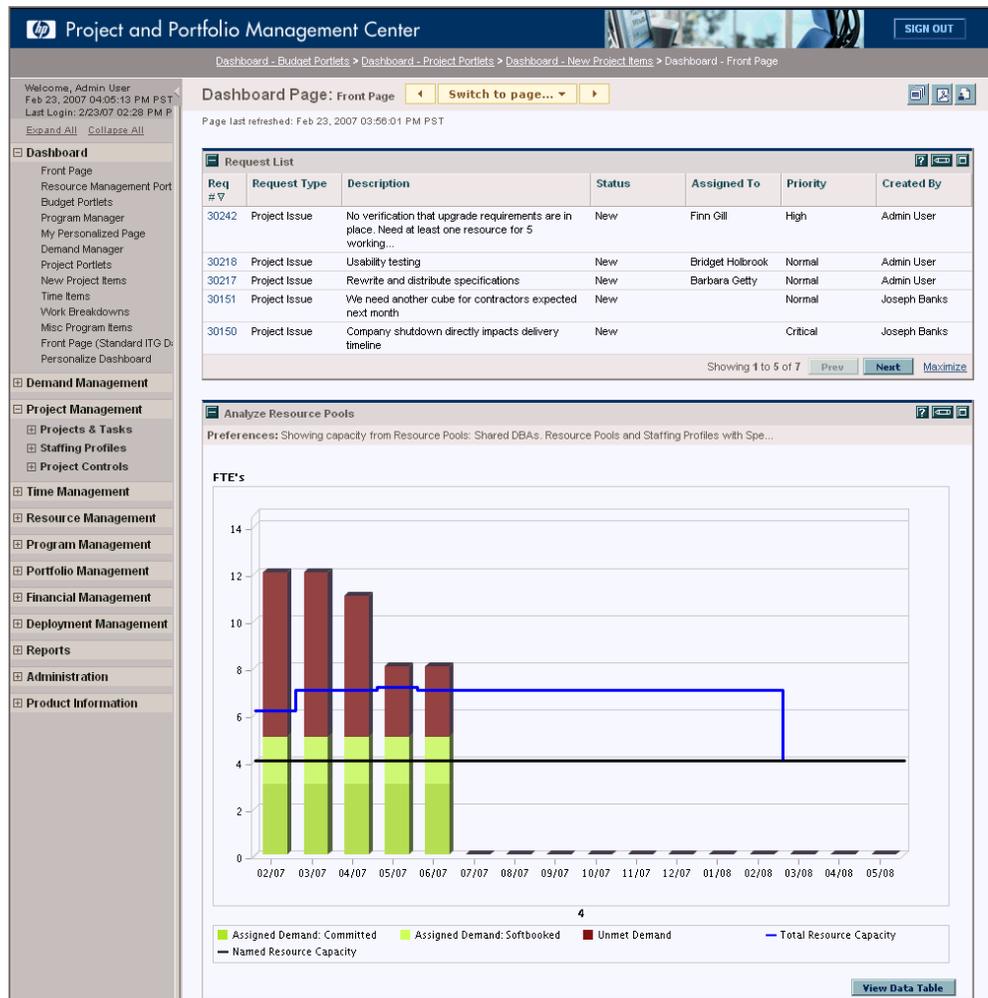


➤ Your view of PPM Center is determined by your level of access to features and data, which is set by your system administrator. The set of pages, portlets, and fields that you see may be different from another user's, depending on the level of access provided to you.

## 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

Dashboard Page: Front Page Switch to page...

Page last refreshed: Feb 23, 2007 04:01:35 PM PST

| 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 | 126000               | 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

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

The figure displays three typical PPM portlets. The first, 'My 2007 Proposals in Progress', is a list portlet showing a table of proposals with columns for Proposal No., Proposal Name, Business Unit, Status, Return on Investment, and Total Score. The second, 'New Proposals to Review', is a list portlet showing a table with columns for Proposal No., Description, Proposal Name, Expected Start Period, Created By, and Executive Sponsor. The third, 'Projects In Progress', is a list portlet showing a table with columns for Name, Work Plan % Complete, Status, Project Manager, Planned Start, and Planned Finish, and includes progress bars for each project.

| 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          |

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

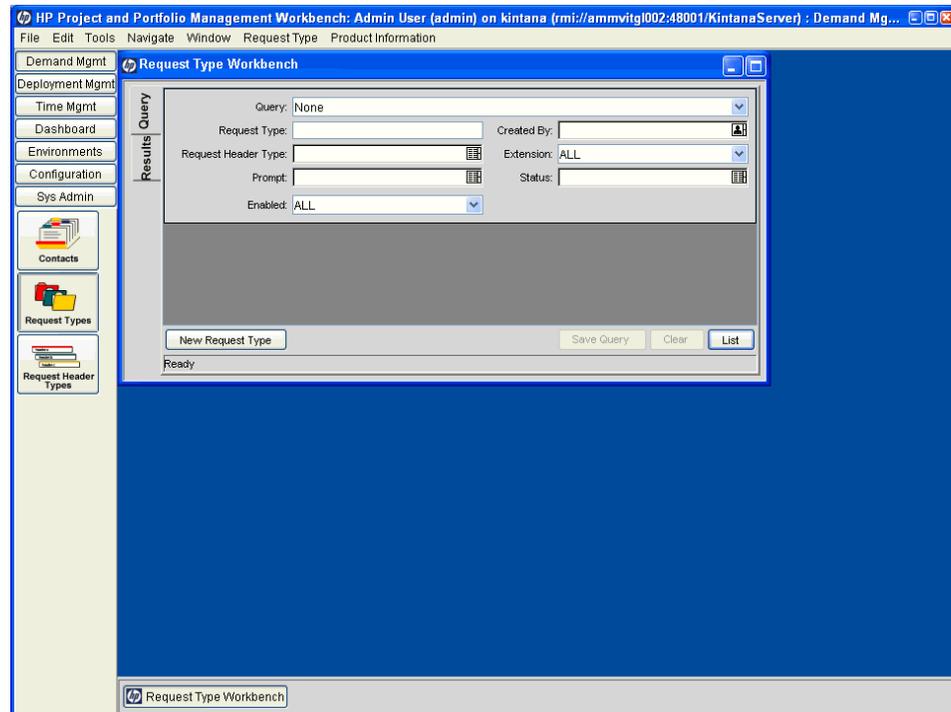
| Name                            | Work Plan % Complete | Status                      | Project Manager            | Planned Start | Planned Finish |
|---------------------------------|----------------------|-----------------------------|----------------------------|---------------|----------------|
| 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   |
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| ERP Upgrade                     | 65%                  | In QA                       | Joseph Banks; Teju Krishna | Jan 1, 2006   | Dec 31, 2006   |

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

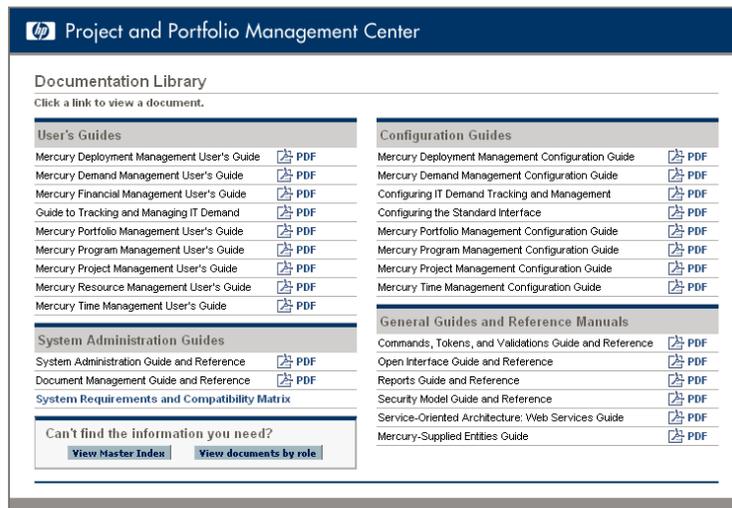
At the bottom of the menu bar is the **Product Information** menu. The **Product Information** menu provides you with access to the Documentation Library and About HP Project and Portfolio Management Center page.

### 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.

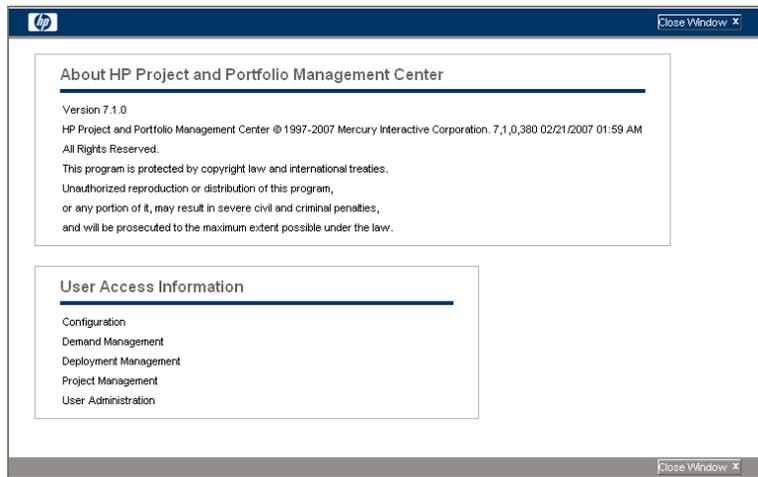


## Viewing Version and User Access Information

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.





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## 2 Using the Web Pages

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### In This Chapter:

- *Logging On and Off PPM Center*
  - *Logging On to PPM Center*
  - *Logging Off PPM Center*
- *Expanding and Collapsing Menus*
- *Hiding and Displaying the Menu Bar*
- *Creating Requests, Packages, and Other Entities*
- *Searching for Requests, Packages, and Other Entities*
  - *Running New Searches*
  - *Using the Query Builder*
  - *Saving Searches*
  - *Running Saved Searches*
  - *Managing Saved Searches*
  - *Managing Saved Search Categories*
  - *Using the Request Browser*
- *Running Reports*
  - *Running New Reports*
  - *Opening Existing Reports*
- *Changing Your Settings*
  - *Changing Your Password*
  - *Setting Warning Message Display*
  - *Setting Maximized Views for Portlets*
  - *Setting Work Plan Page View Preferences*
  - *Setting Cost Displays*
- *Using the PPM Dashboard*
  - *Opening PPM Dashboard Pages*
  - *Setting Portlet Views*
  - *Arranging Data in List Portlets*
  - *Drilling Down from Portlets*
  - *Exporting Data to Excel Spreadsheets*
  - *Exporting PPM Dashboard Pages to PDF Files*
  - *Cycling Through PPM Dashboard Pages Automatically*
- *Personalizing the PPM Dashboard*
  - *Adding PPM Dashboard Pages*
  - *Copying, Moving, and Deleting PPM Dashboard Pages*
  - *Renaming PPM Dashboard Pages*
  - *Setting Refresh Rates for PPM Dashboard Pages*
  - *Adding Portlets to PPM Dashboard Pages*

- *Copying and Moving Portlets on PPM Dashboard Pages*
  - *Previewing PPM Dashboard Pages*
  - *Working with Groups*
  - *Personalizing Portlets*
    - *Deleting Portlets*
    - *Changing the Size of Portlets*
    - *Configuring Portlets*
- 

## 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:

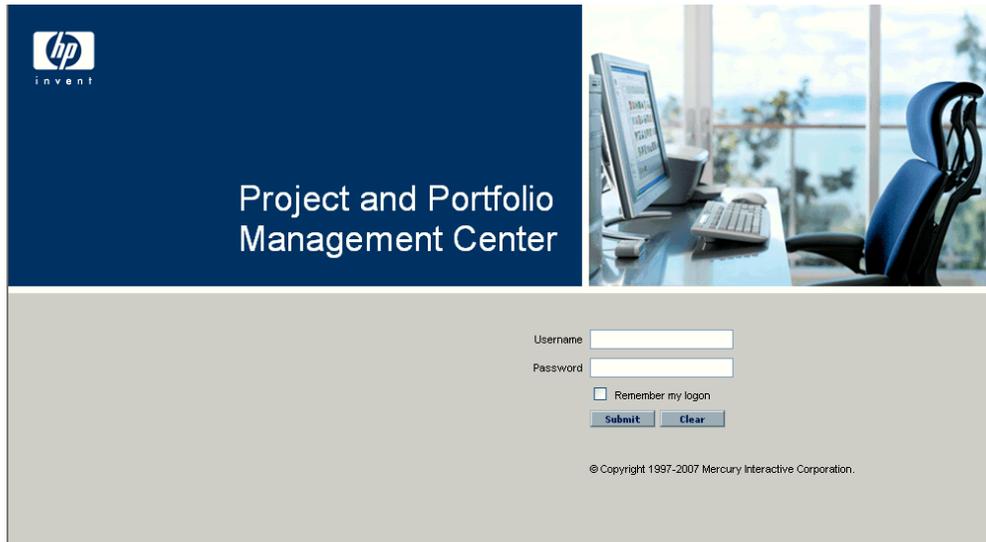
- PPM Center Web address (URL)
- A username
- A password
- At least one PPM Center product license

### 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.

**hp 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 Page: Front Page** Switch to page...

Page last refreshed: Feb 23, 2007 03:56:01 PM PST

**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 ITO 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**

| 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**

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

The screenshot displays the Project and Portfolio Management Center interface. At the top right, there is a **SIGN OUT** button. The dashboard includes a navigation menu on the left and a main content area with two sections: a Request List and an Analyze Resource Pools chart.

**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 Holtbrook | 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 |

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**Analyze Resource Pools**

Preferences: Showing capacity from Resource Pools: Shared DBAs, Resource Pools and Staffing Profiles with Spe...

**FTE's**

The chart displays resource demand and capacity over time. The Y-axis represents FTE's (0 to 14). The X-axis shows months from 02/07 to 05/08. The legend indicates: Assigned Demand: Committed (dark green), Assigned Demand: Softbooked (light green), Unmet Demand (dark red), Total Resource Capacity (blue line), and Named Resource Capacity (black line).

| Month | Assigned Demand: Committed | Assigned Demand: Softbooked | Unmet Demand | Total Resource Capacity | Named Resource Capacity |
|-------|----------------------------|-----------------------------|--------------|-------------------------|-------------------------|
| 02/07 | 3                          | 2                           | 7            | 6                       | 4                       |
| 03/07 | 3                          | 2                           | 7            | 7                       | 4                       |
| 04/07 | 3                          | 2                           | 6            | 7                       | 4                       |
| 05/07 | 3                          | 2                           | 3            | 7                       | 4                       |
| 06/07 | 3                          | 2                           | 3            | 7                       | 4                       |
| 07/07 | 0                          | 0                           | 0            | 7                       | 4                       |
| 08/07 | 0                          | 0                           | 0            | 7                       | 4                       |
| 09/07 | 0                          | 0                           | 0            | 7                       | 4                       |
| 10/07 | 0                          | 0                           | 0            | 7                       | 4                       |
| 11/07 | 0                          | 0                           | 0            | 7                       | 4                       |
| 12/07 | 0                          | 0                           | 0            | 7                       | 4                       |
| 01/08 | 0                          | 0                           | 0            | 7                       | 4                       |
| 02/08 | 0                          | 0                           | 0            | 7                       | 4                       |
| 03/08 | 0                          | 0                           | 0            | 7                       | 4                       |
| 04/08 | 0                          | 0                           | 0            | 7                       | 4                       |
| 05/08 | 0                          | 0                           | 0            | 7                       | 4                       |

[View Data Table](#)

## 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.

The screenshot shows the 'Create New Budget' form. It includes a 'Budget Name' text field, a 'This is a' dropdown menu, and a 'Budget for' text field with a 'View' button. Below this is a section for 'Actuals are rolled up:' with three radio button options: 'Manually', 'Automatically', and 'Partially'. A paragraph of text explains the Budget to Budget comparison portlet. There is a 'Parent Budget for Comparison' dropdown and text field with a 'View' button. A question 'Will this Budget have capitalized Costs?' has 'Yes' and 'No' radio buttons, with 'No' selected. There are text fields for 'Region' (MercuryUS), 'Start Period' (March 2007), and 'Finish Period' (May 2007). A 'Continue' button is at the bottom right.

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

The screenshot shows the 'Create New Request' form. It has a 'Request Type' dropdown menu and a 'Create' button. Below the form is a table titled 'Create Based On Desired Action' with a 'Most Recently Created' header and a list of request types: 'Request a New Initiative', 'Generic Request', 'Report an Application Bug', 'Request an Application Enhancement', and 'Submit Project Risk'.

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.

Create New Program

---

**Program Name:**

**Program Managers:**  

**Description:**

**Benefit:**

**Status Notes:**

**Program Budget**

**Budget:**   [View](#)

**Projects**

| Project Name                | % Complete | Project Status | Sched Start | Sched Finish | Project Manager |
|-----------------------------|------------|----------------|-------------|--------------|-----------------|
| <a href="#">Add Project</a> |            |                |             |              |                 |

**Business Objectives**

| Name                                   | State | Owner | Priority | Description |
|--|-------|-------|----------|-------------|
| <a href="#">Add Business Objective</a> |       |       |          |             |

**Notes**

**New Note:**

---

[Create](#)

# 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.

| Request Search Results         |               |  |        |                  |          |              | Showing 1 - 7 of 7 |
|--------------------------------|---------------|--|--------|------------------|----------|--------------|--------------------|
| Req #                          | Request Type  | Description  | Status | Assigned To      | Priority | Created By   |                    |
| <input type="checkbox"/> 30150 | Project Issue | Company shutdown directly impacts delivery timeline  | New    |                  | Critical | Joseph Banks |                    |
| <input type="checkbox"/> 30151 | Project Issue | We need another cube for contractors expected next month   | New    |                  | Normal   | Joseph Banks |                    |
| <input type="checkbox"/> 30063 | Project Issue | New requirements for Order Processing introduced during testing  | New    |                  | Critical | Admin User   |                    |
| <input type="checkbox"/> 30217 | Project Issue | Rewrite and distribute specifications  | New    | Barbara Getty    | Normal   | Admin User   |                    |
| <input type="checkbox"/> 30242 | Project Issue | No verification that upgrade requirements are in place. Need at least one resource for 5 working days to complete. | New    | Finn Gill        | High     | Admin User   |                    |
| <input type="checkbox"/> 30218 | Project Issue | Usability testing  | New    | Bridget Holbrook | Normal   | Admin User   |                    |
| <input type="checkbox"/> 30030 | Project Issue | Losing our Oracle Apps expert QA person  | Open   | Joseph Banks     | Critical | Joseph Banks |                    |

Showing 1 - 7 of 7

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.

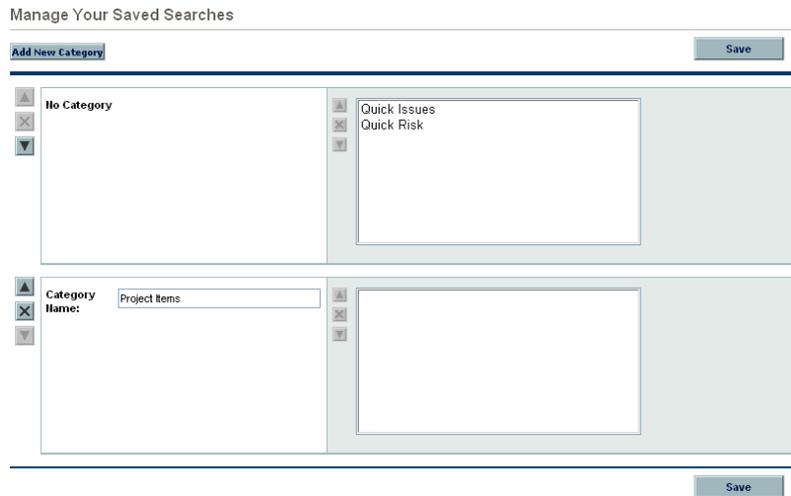
## Managing Saved Searches

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.

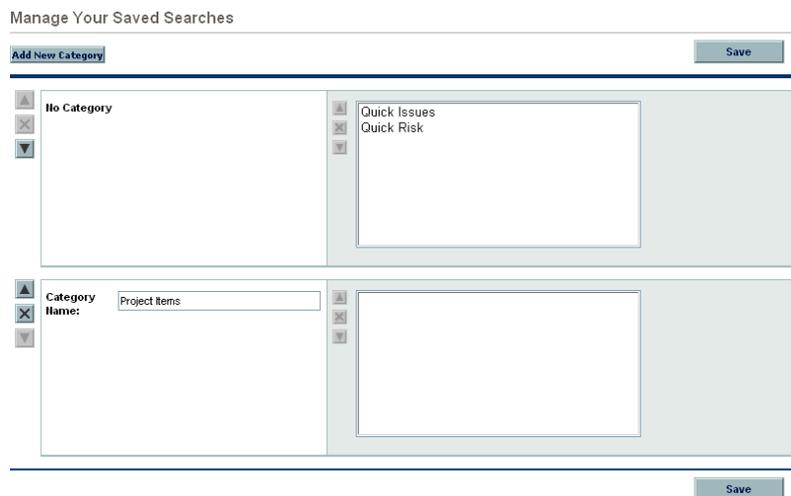
## Managing Saved Search Categories

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

Browse PFM - Project Requests

| Business Objective > Status |  | Total |
|-----------------------------|--|-------|
| Total                       |  | 15    |
| Efficiency Across Teams     |  | 3     |
| Design                      |  | 1     |
| In QA                       |  | 1     |
| Requirements                |  | 1     |
| <Blank>                     |  | 12    |
| Assign Project Manager      |  | 6     |
| Business Readiness Sign-Off |  | 3     |
| Deploy                      |  | 1     |
| Design                      |  | 1     |
| Detailed Project Definition |  | 1     |

| Request Search Results (Filters: Business Objective=<Blank>, Status=Assign Project Manager) |               |                                   |                        |             |          |               |
|---|---------------|-----------------------------------|------------------------|-------------|----------|---------------|
| Project No  | Request Type  | Description                       | Status                 | Assigned To | Priority | Created By    |
| 30301   | PFM - Project |                                   | Assign Project Manager |             |          | Admin User    |
| 30271   | PFM - Project | Testing the description           | Assign Project Manager |             |          | Admin User    |
| 30187   | PFM - Project |                                   | Assign Project Manager |             |          | Barbara Getty |
| 30090   | PFM - Project |                                   | Assign Project Manager |             |          | Carolyn Sayer |
| 30060   | PFM - Project |                                   | Assign Project Manager |             |          | Admin User    |
| 30014   | PFM - Project | Internal Web Site Rollout - sales | Assign Project Manager |             |          | Carolyn Sayer |

Showing 1 - 6 of 6

[Export to Excel](#)

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

Figure 2-6. Request Browser search

Browse Requests

Delete Preference Set Browse Cancel

---

**Request Browser List Configuration** Clear Fields

**Request Type:**  Advanced Search

**Status:**  **Priority:**

**Assigned To:**  **Assigned To Group:**

**Created By:**  **Request Sub Type:**

**Department:**  **Application:**

**Workflow:**  **Request Group:**

**Contact:**  **Company Name:**

**Linked Project:**

**Creation Date From:**  **To:**

**Last Update Date From:**  **To:**

**Request Key Words:** Search the content of Request Notes and Descriptions.

**Preventing Action On:**  Requests  Packages **Eligible for My Action?**  Yes  No **Include Closed?**  Yes  No

**Sort By:**   Ascending  Descending

**Maximum Results Per Page:**  **Maximum rows at each Tree Level:**

---

**Choose Columns for Request List**

| Available Columns   | Selected Columns   |
|---|--|
| <ul style="list-style-type: none"> <li>% Complete</li> <li>Application</li> <li>Assigned To Group</li> <li>Company Name</li> <li>Contact</li> <li>Creation Date</li> <li>Department</li> <li>Last Updated</li> <li>Req #</li> </ul> | <ul style="list-style-type: none"> <li>Project No *</li> <li>Request Type</li> <li>Description</li> <li>Status</li> <li>Assigned To</li> <li>Priority</li> <li>Created By</li> </ul> |

Note: Columns followed by an asterisk (\*) cannot be removed from the display.

---

**Request Browser Tree Configuration**

**Choose Additional Column to Display in Request Browser Tree**

**Additional Column:**

**Choose Fields to Group by in Request Browser Tree**

| Available Columns   | Selected Columns |
|---|------------------|
| <ul style="list-style-type: none"> <li>Application</li> <li>Assigned To</li> <li>Assigned To Group</li> <li>Company Name</li> <li>Contact</li> <li>Created By</li> <li>Creation Date</li> <li>Department</li> <li>Last Updated</li> </ul> |                  |

Note: At least 1 field needs to be selected. (Maximum 5 fields can be selected).

**Save this Preference Set as:**  Save

Browse Cancel

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.

Submit New Report

| Recently Submitted Reports    |   |
|-------------------------------|---|
| Project Cost Breakdown        | This Report shows the costs for the Project and the Activities with which the costs are associated. Labor and Non-Labor costs are included in the totals. |
| Baseline Comparison Report    | Compare current schedule to a Baseline or compare Baselines   |
| Special Command Detail Report | View the configuration details of one or more special commands. Useful for debugging execution problems.  |
| Validations Report            | View the configuration details of one or more validations   |
| Data Source Detail Report     | View the configuration details of one or more Data Sources. Details all filter fields, displayed columns, query, and used by for each Data Source.        |

---

Select Report by Category

Report Category:

|                            |   |
|----------------------------|---|
| Baseline Comparison Report | Compare current schedule to a Baseline or compare Baselines   |
| Project Cost Breakdown     | This Report shows the costs for the Project and the Activities with which the costs are associated. Labor and Non-Labor costs are included in the totals. |
| Project Cost Details       | View Cost Details for a Project   |

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.

Editing Profile

Change Password

Old Password:

New Password:

Repeat New Password:

Dismissible Message Settings

Warning Messages that you chose not to show again can be turned back on here.

Bring back all warning messages

Overview Page Section Preferences

Results in Maximized Overview Sections:

Project Work Plan Preferences

The number of tasks displayed per page in the project work plan can be configured here.

20 tasks per page.

100 tasks per page.

Tasks per page (max allowed = 500).

Cost Display

I prefer to see Costs displayed in the:

Base Currency: United States Dollar (USD)

Local Currency

Done

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

The new password is accepted.

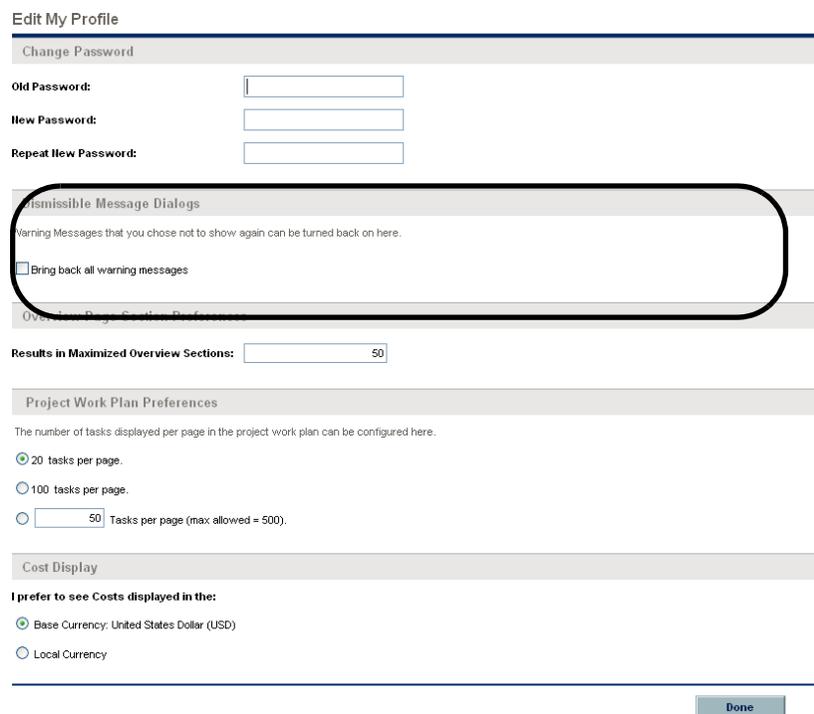
## Setting Warning Message Display

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.



The screenshot shows the 'Edit My Profile' page with several sections. The 'Dismissible Message Dialogs' section is highlighted with a red rounded rectangle. It contains the text 'Warning Messages that you chose not to show again can be turned back on here.' and a checkbox labeled 'Bring back all warning messages' which is currently unchecked. Below this section is a text input field for 'Results in Maximized Overview Sections:' with the value '50'. Other sections include 'Change Password', 'Project Work Plan Preferences', and 'Cost Display'. A 'Done' button is located at the bottom right of the page.

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.

The screenshot shows the 'Edit My Profile' page with several sections. The 'Overview Page Section Preferences' section is highlighted with a red oval. In this section, the 'Results in Maximized Overview Sections' field is set to '50'. Other sections include 'Change Password', 'Dismissible Message Dialogs', 'Project Work Plan Preferences', and 'Cost Display'.

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*.

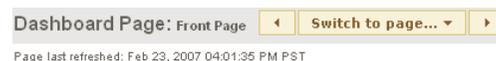
## Using the PPM Dashboard

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

| Proposal No | Proposal Name                           | Business Unit | Status                   | Return on Investment | Total Score |
|-------------|---|---------------|--------------------------|----------------------|-------------|
| 30006       | Build new data center                   | Corporate     | High-Level Business Case | 171000               | 31          |
| 30009       | CIO's pet project                       | Corporate     | ITSC Review              | 150000               | 40          |
| 30012       | Create performance center of excellence | Corporate     | High-Level Business Case | 128000               | 36          |
| 30007       | Expand to China                         | Corporate     | High-Level Business Case | 154000               | 28          |
| 30008       | Expand to Europe                        | Corporate     | High-Level Business Case | 163000               | 64          |

Showing 1 to 5 of 15    Prev    Next    Maximize

New Proposals to Review

- **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

The figure shows three screenshots of different portlets, each with a red circle highlighting the maximize icon in the top right corner:

- My 2007 Proposals in Progress:** A table with columns: Proposal No, Proposal Name, Business Unit, Status, Return on Investment, Total Score. Data rows include 30061, 30017, 30013, 30012, and 30011.
- New Proposals to Review:** A table with columns: Proposal No, Description, Proposal Name, Expected Start Period, Created By, Executive Sponsor. Data row: 30330 Upgrade DB version.
- Projects In Progress:** A table with columns: Name, Work Plan % Complete, Status, Project Manager, Planned Start, Planned Finish. Data rows include Apple Proj, Change Actualization Initiative, Consulting Project, ERP Service Pack, and ERP Upgrade.

Figure 2-10. Portlet maximized view

Maximized View [Back](#)

The screenshot shows a maximized view of the 'My 2007 Proposals in Progress' portlet. The table includes additional columns: Value Rating and Risk Rating. The data is as follows:

| 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          |

Showing 1 to 15 of 15 [Prev](#) [Next](#) [Export to Excel](#)

## 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

| Proposal No | Proposal Name  | Business Unit | Status                   | Return on Investment | Total Score |
|-------------|---|---------------|--------------------------|----------------------|-------------|
| 30006       | Build new data center   | Corporate     | High-Level Business Case | 171000               | 31          |
| 30009       | CIO's pet project   | Corporate     | ITSC Review              | 150000               | 40          |
| 30012       | Create performance center of excellence   | Corporate     | High-Level Business Case | 128000               | 36          |
| 30007       | Expand to China   | Corporate     | High-Level Business Case | 154000               | 28          |
| 30008       | Expand to Europe  | Corporate     | High-Level Business Case | 163000               | 64          |

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## 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

The screenshot illustrates the process of drilling down from a list portlet to a detailed view. At the top, a table titled "My 2007 Proposals in Progress" lists several proposals. A black arrow points from the "CIO's pet project" entry (Proposal No. 30009) in the table to the detailed view below.

| Proposal No | Proposal Name Δ                         | Business Unit | Status                   | Return on Investment | Total Score |
|-------------|---|---------------|--------------------------|----------------------|-------------|
| 30006       | Build new data center                   | Corporate     | High-Level Business Case | 171000               | 31          |
| 30009       | CIO's pet project                       | Corporate     | ITSC Review              | 150000               | 40          |
| 30012       | Create performance center of excellence | Corporate     | High-Level Business Case | 128000               | 36          |
| 30007       | Expand to China                         | Corporate     | High-Level Business Case | 154000               | 28          |
| 30008       | Expand to Europe                        | Corporate     | High-Level Business Case | 163000               | 64          |

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Printable Version Result 2 of 15

### PFM - Proposal - #30009

Description: CIO's pet project  
Request Status: ITSC Review ([View Full Status Below](#))  
No Available Actions

[Make a Copy](#)

[Expand All](#) [Collapse All](#) [Save](#)

Header  
Summary

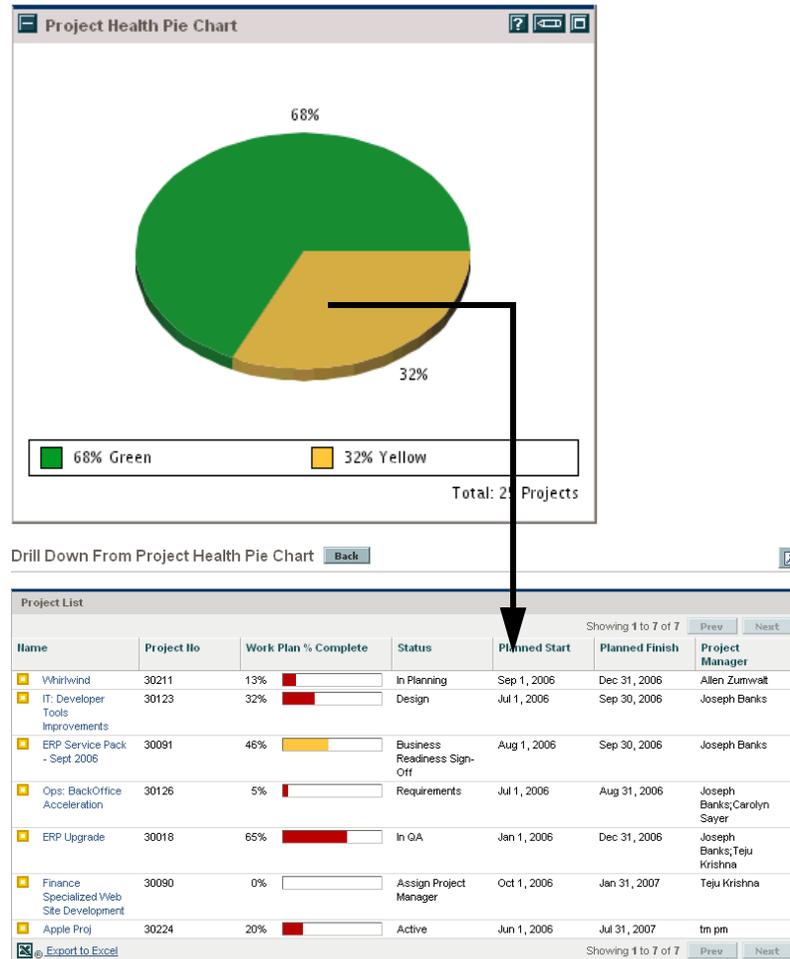
**Proposal No.:** 30009 **Created By:** Barbara Getty  
**Driving Process:** PFM - Proposal  
**Business Unit:** Corporate **Status:** ITSC Review  
**Description:** CIO's pet project  
**Request Type:** PFM - Proposal  
**Project Type:**  **Region:**   
**Proposal Dependencies:**

[Details](#)  
[Notes](#) No Notes Exist  
[Status](#)  
[References](#)

[Make a Copy](#) [Save](#)

- 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

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 commuters           | Corporate     | High-Level Business Case | 120000               | 22          | 35           | 13          |

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## 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.

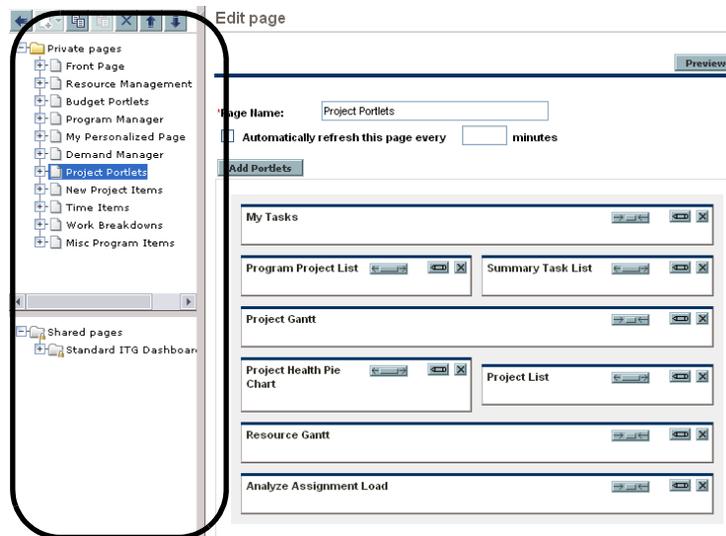
## Personalizing the PPM Dashboard

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.

[Preview](#)

---

Page Name:

Automatically refresh this page every  minutes

[Add Portlets](#)

|  |  |
|--|--|
| My Tasks <span style="float: right;">→ ← ×</span>                |  |
| Program Project List <span style="float: right;">← ×</span>      | Summary Task List <span style="float: right;">← ×</span> |
| Project Gantt <span style="float: right;">→ ← ×</span>           |  |
| Project Health Pie Chart <span style="float: right;">← ×</span>  | Project List <span style="float: right;">← ×</span>      |
| Resource Gantt <span style="float: right;">→ ← ×</span>          |  |
| Analyze Assignment Load <span style="float: right;">→ ← ×</span> |  |

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.

Edit page

[Preview](#)

---

Page Name:

Automatically refresh this page every  minutes

[Add Portlets](#)

My Tasks ↔ ⏪ ⏩ ✕

---

Program Project List ↔ ⏪ ⏩ ✕      Summary Task List ↔ ⏪ ⏩ ✕

---

Project Gantt ↔ ⏪ ⏩ ✕

---

Project Health Pie Chart ↔ ⏪ ⏩ ✕      Project List ↔ ⏪ ⏩ ✕

---

Resource Gantt ↔ ⏪ ⏩ ✕

---

Analyze Assignment Load ↔ ⏪ ⏩ ✕

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.

[Preview](#)

---

Page Name:

Automatically refresh this page every  minutes

**Add Portlets**

My Tasks → ← ×

---

Program Project List → ← ×      Summary Task List → ← ×

---

Project Gantt → ← ×

---

Project Health Pie Chart → ← ×      Project List → ← ×

---

Resource Gantt → ← ×

---

Analyze Assignment Load → ← ×

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.

Edit Preferences: Project Health Pie Chart (Project Health Pie Chart)

Preview Change Title

---

Done Cancel

Preferences

Specific Projects:

Projects matching criteria:

Project Manager:

Status:

Include Finished Projects

Project Type:

Program:

Region:

Project Health:    
   
   
 No Health

---

Done Cancel

### 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 that 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](#).



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## 3 Using the PPM Workbench

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### In This Chapter:

- *Opening and Closing the PPM Workbench*
  - *Searching for Entities*
    - *Saved Queries*
    - *Case Sensitivity and Using Wildcards*
    - *Advanced Queries*
    - *Selecting Configuration Entities*
    - *Opening, Deleting, and Copying Entities*
    - *Creating New Entities*
  - *Navigating Among Workbench Windows*
-

## 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.

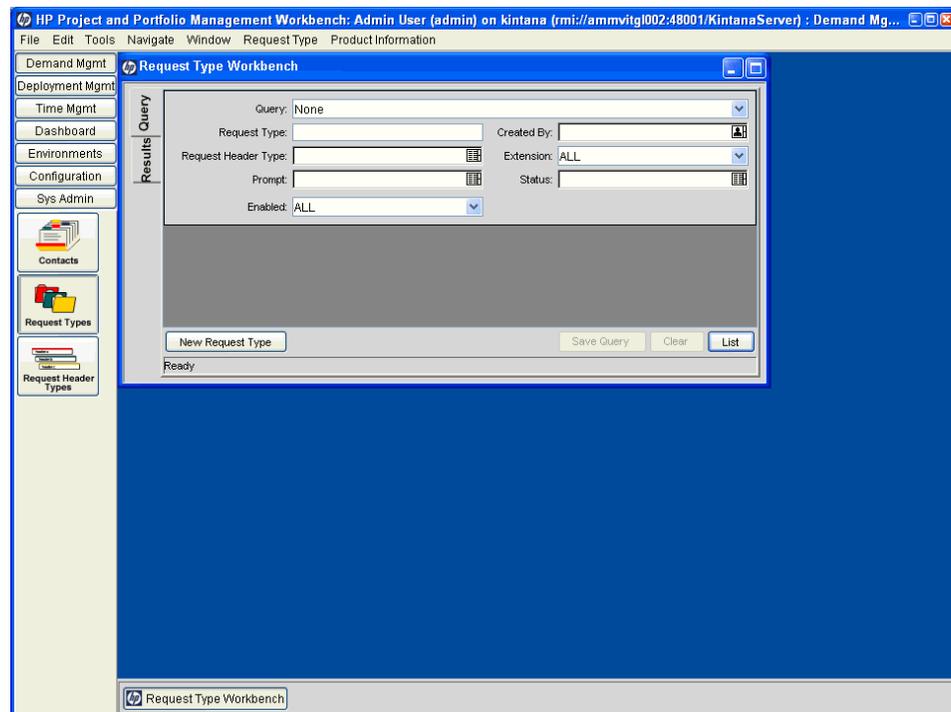
To open the PPM Workbench:

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:

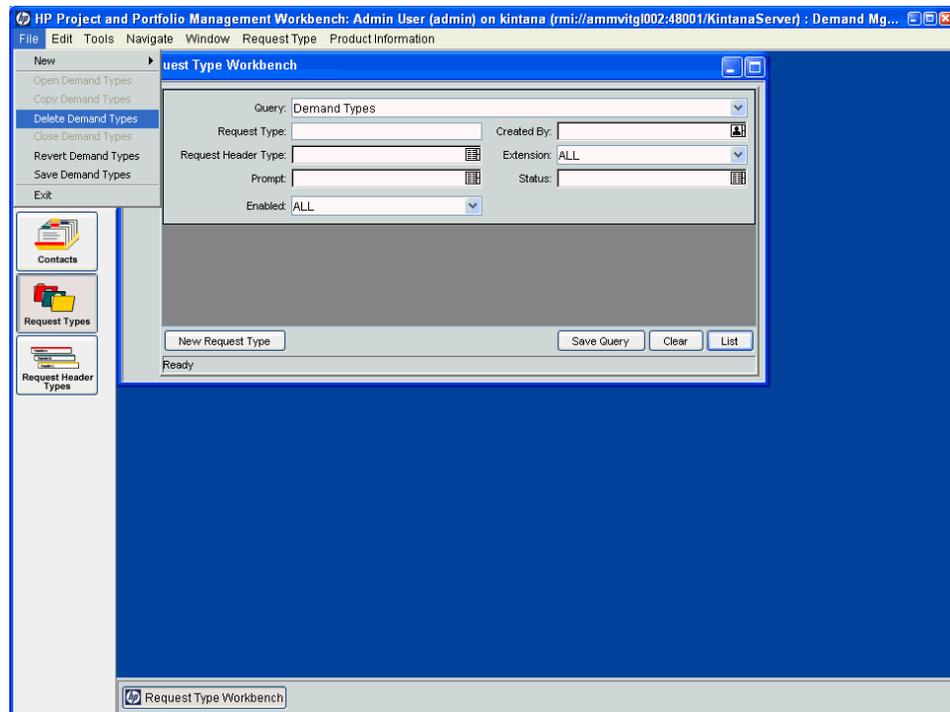
1. Open the PPM Workbench.
2. Select the configuration entity Workbench window.

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

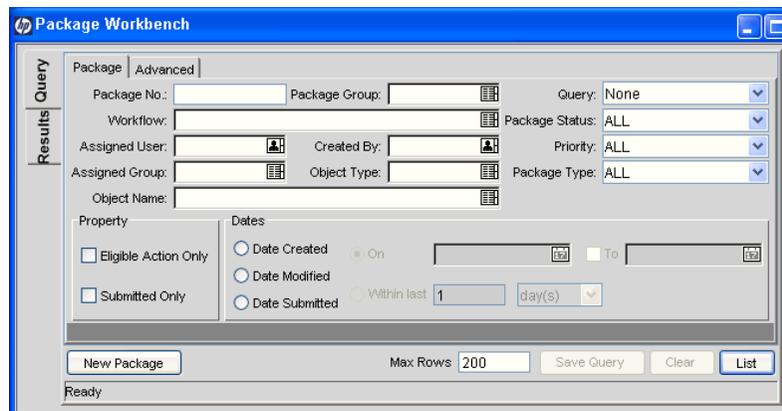
Filter fields are case insensitive. For example, entering the word **test** in a filter field would return **test**, **TEST**, and **Test**. Filter fields also return partial matches. For example, entering the word **test** in a filter field could return **Test Project** and **Testing Project**.

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



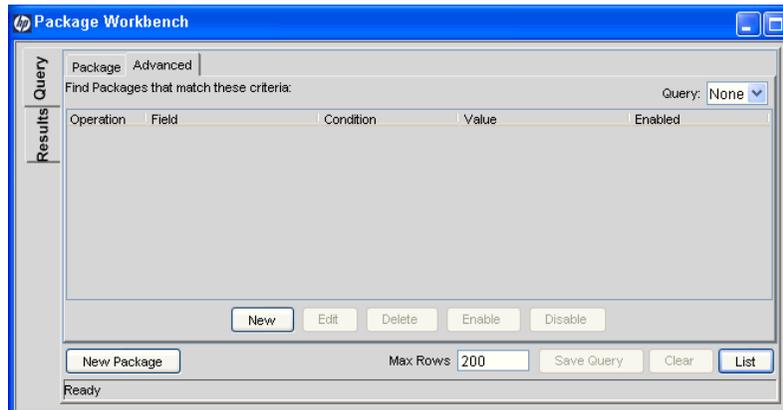
To enter advanced query criteria:

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.

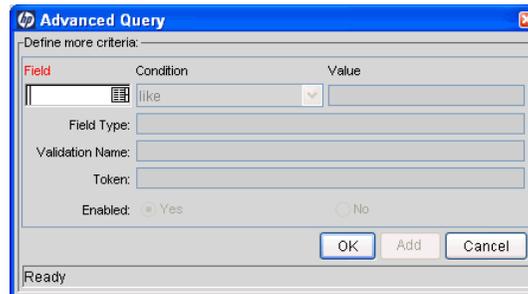
3. In the **Package** tab, complete the search criteria and click the **Advanced** tab.

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**.

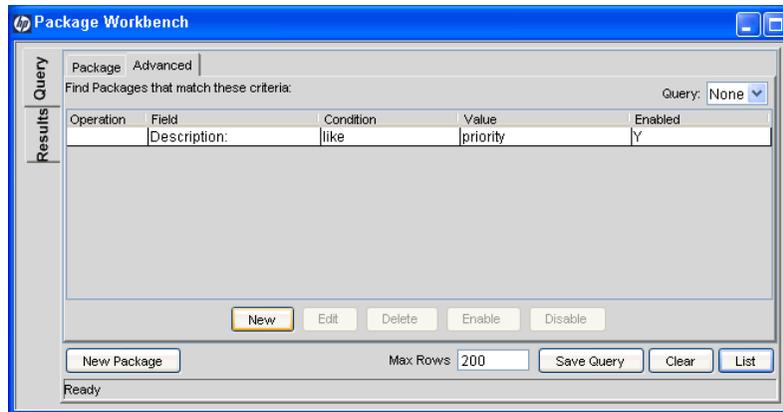
See *Table 3-1* for the list of conditions. The advanced query logic is added to the query.

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.     |



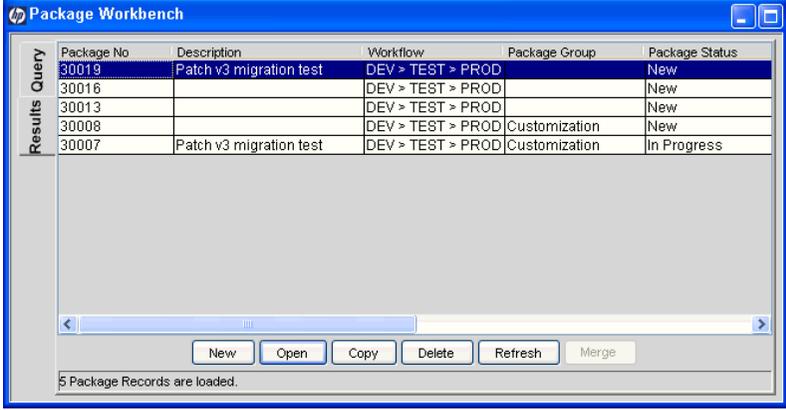
6. In the **Advanced** tab, click **List**.

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



The screenshot shows the Package Workbench interface with the Results tab selected. The table displays the following data:

| Package No | Description             | Workflow          | Package Group | Package Status |
|------------|-------------------------|-------------------|---------------|----------------|
| 30019      | Patch v3 migration test | DEV > TEST > PROD |               | New            |
| 30016      |                         | DEV > TEST > PROD |               | New            |
| 30013      |                         | DEV > TEST > PROD |               | New            |
| 30008      |                         | DEV > TEST > PROD | Customization | New            |
| 30007      | Patch v3 migration test | DEV > TEST > PROD | Customization | In Progress    |

Below the table, there are buttons for New, Open, Copy, Delete, Refresh, and Merge. A status bar at the bottom indicates "5 Package Records are loaded."

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.

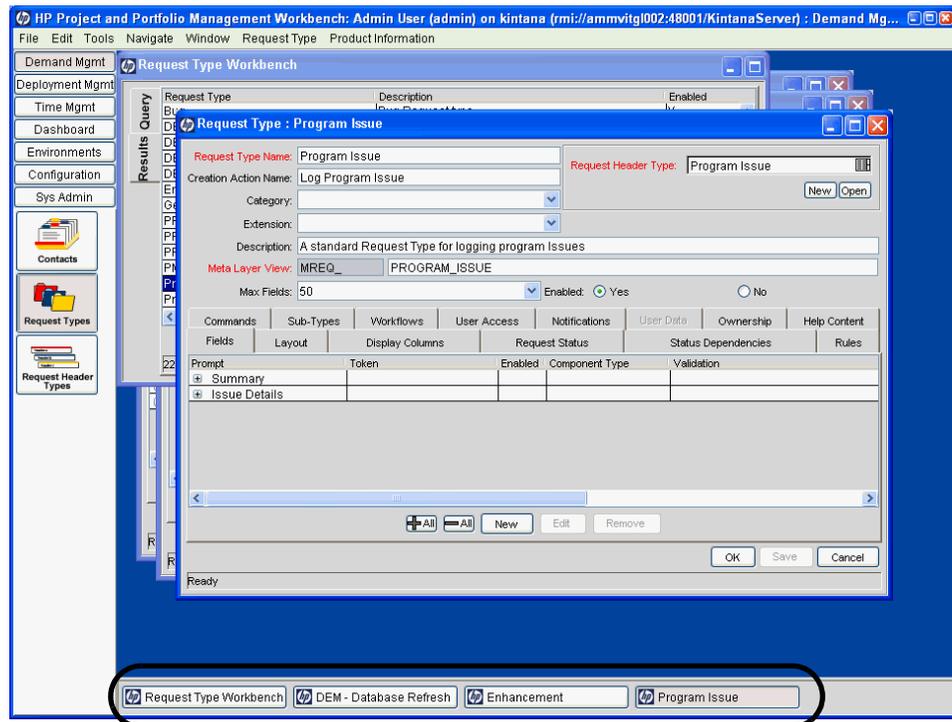
## Navigating Among Workbench Windows

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





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## 4 What's Next

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### 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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