

# HP Project and Portfolio Management Center

Software Version: 8.00

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## Creating Portlets and Modules

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# 1 Getting Acquainted with the Standard Interface

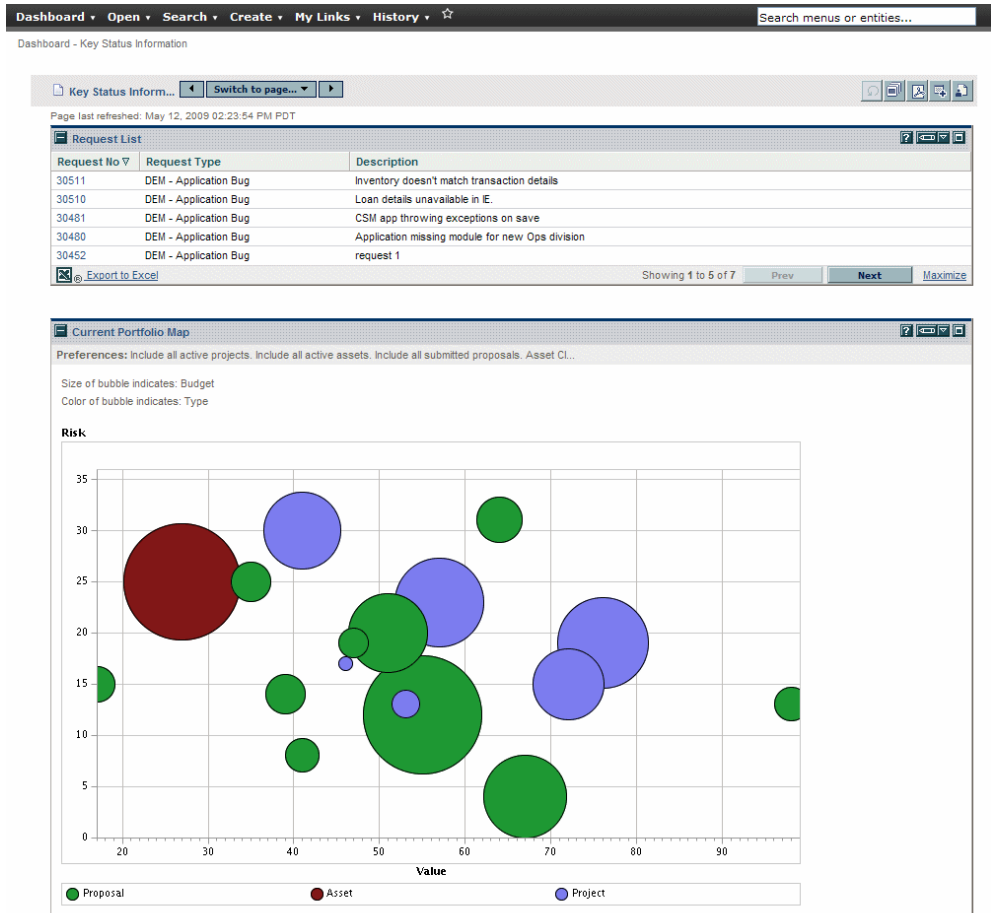
## Introduction to the Standard Interface

Most HP Project and Portfolio Management Center (PPM Center) users work solely in the standard interface, although some may use the PPM Workbench as well. The standard interface opens in your Web browser, and from it, you can run reports, create requests, and search for packages, among other things.

A key feature of PPM Center is the PPM Dashboard, which provides you with a real-time view into your PPM Center–based activities.

Using the PPM Dashboard’s portlets, you can view almost anything, from the status of requests assigned to you, to comparisons between current projects and staffing profiles. *Figure 1-1* shows a PPM Dashboard page that relies on two HP-supplied portlets: Request List and Current Portfolio Map.

Figure 1-1. Personalized PPM Dashboard page



When you first log on to PPM Center, you are presented with a PPM Dashboard page. The PPM Dashboard page displayed is determined by the system administrator (if your system administrator has configured a default landing page) or how you personalized your pages. HP provides a PPM Dashboard page named Front Page (Standard PPM Dashboard).

For more information about logging on to PPM Center, see the *Getting Started* guide.

# Overview of Creating Portlets and Modules

Managers (or other lead personnel) can create, maintain, and share *configured* Dashboard pages and portlets to facilitate communication and coordination for their own projects. For example, your recruiting organization might share the list of current job openings.

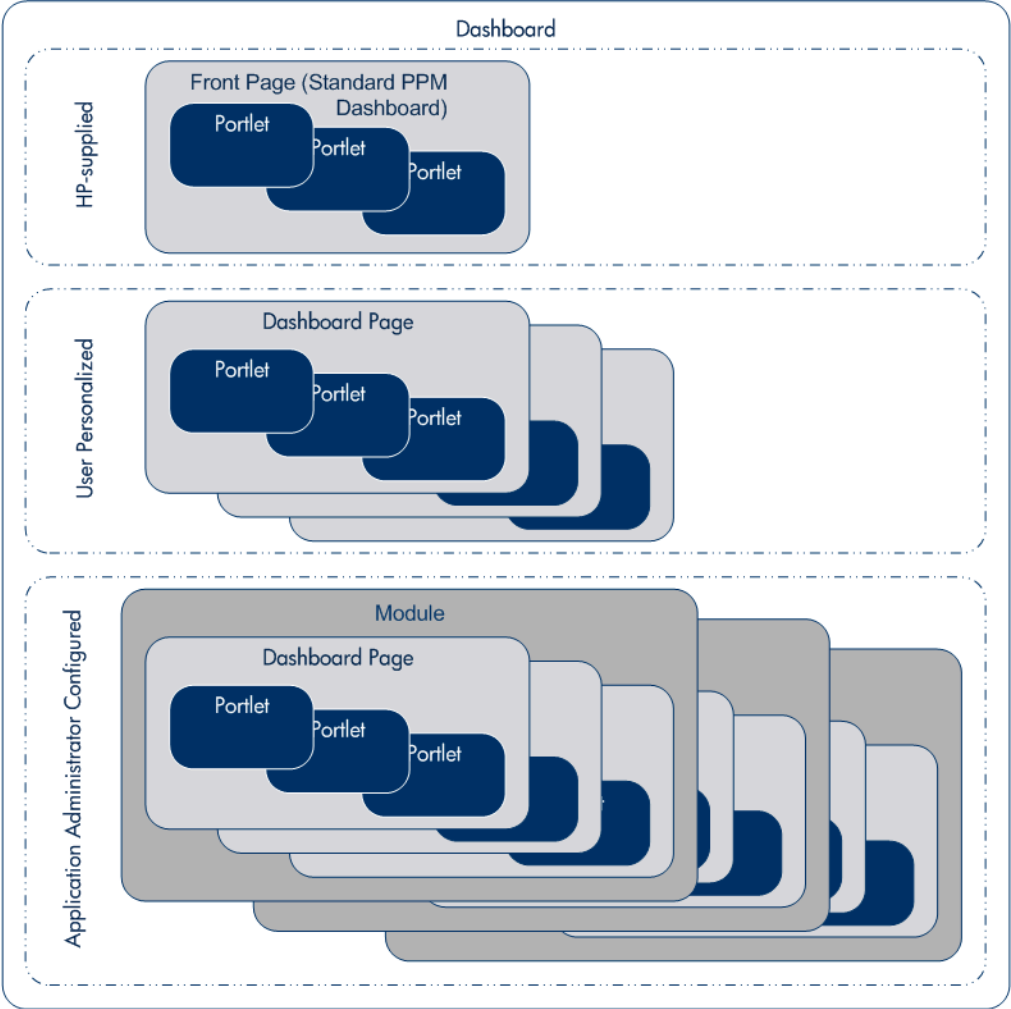
Configuring the standard interface in this manner provides a mechanism for managers to share real-time information up and/or down the chain of command.



The individuals who plan, set up, and maintain HP-based applications are generally called application administrators (or configurators) and their responsibilities may also include configuring PPM Dashboard pages.

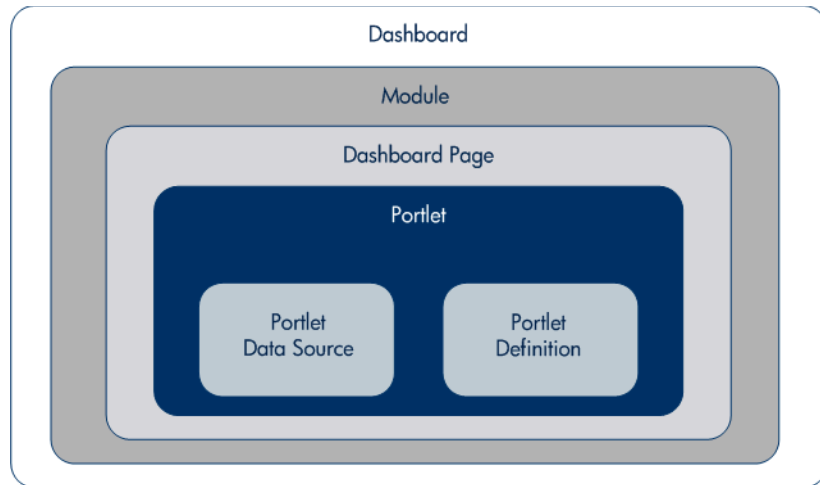
*Figure 1-2* provides a visual overview of the different types of Dashboard pages. This document focuses on the application administrator-configured Dashboard pages; however, [Chapter 4, \*Creating and Maintaining PPM Dashboard Pages and Modules\*, on page 137](#) briefly describes how users can add preconfigured Dashboard pages.

Figure 1-2. Various types of PPM Dashboard pages



*Figure 1-3* details the major components that make up configured Dashboard pages and depicts their relationships.

Figure 1-3. PPM Dashboard components



- **Dashboard.** The PPM Dashboard is one of the key applications provided with PPM Center.

In addition to the pre-installed Front Page and optional user-personalized Dashboard pages, the PPM Dashboard can include one or more modules.

- **Module.** A module is the container for one or more Dashboard pages.

Modules are created much like a Dashboard page is personalized by an individual user. Modules are created by application administrators.

- **Dashboard page.** A Dashboard page is the container for one or more portlets.

Dashboard pages within a module can be added, modified, and deleted. Similarly, on each Dashboard page, portlets can be added, modified, or deleted.

- **Portlet.** Portlets are the key visualization component of the PPM Dashboard and display information relevant to your PPM Center data. HP provides numerous portlets and additional (personalized or configured) portlets can be created.

In general, portlets rely on the following:

- **Portlet data sources.** For some portlets, these are typically the SQL queries used to gather the information from the PPM Center database. Other data sources include Web pages and RSS feeds.
- **Portlet definitions.** These define the look and feel of a portlet and can be customized. Portlet definitions can include such information as the type of portlet, data source, display options such as labels and columns to display, layout, user and group access to the portlet, and filter field definitions.

## Standards-Based Portlet Support

PPM Center is a Java™-compliant portal, and provides support for Java-compliant portlets that are not included with PPM Center. Java portlets can be developed using the Java API, purchased from vendors (such as Sun Microsystems), or obtained with products (such as WebLogic Portal).

WSRP-compliant portlets are also supported by PPM Center. Web Services for Remote Portlets (WSRP) allows portals to publish portlets so that other portals can “consume” them. Use of WSRP portlets simplifies integration between systems and can reduce programming overhead as well as provide continuity for users of multiple systems.

PPM Center provides support for JSR 168 and WSRP standards-compliant portlets. This support is based on the Apache Reference implementations of two specifications: Pluto and WSRP4J. However, the specifications may not be complete in all areas or may be open to interpretation. HP has made design decisions to cover these areas.



HP is committed to provide support for customers implementing these types of portlets, including debugging and diagnosing problems related to the PPM Dashboard. HP does not extend that support to cover the debugging of custom portlet code or configuration files.

To facilitate diagnosis, customers reporting problems to the HP Software Support Web site ([hp.com/go/hpsoftwaresupport](http://hp.com/go/hpsoftwaresupport)) are required to provide a simple, reproducible case that demonstrates the error in the PPM Dashboard.

# The Configuration Process

Configuring the standard interface requires steps relating to both creating portlets and making them available. In general, the process is as follows:

## **Step 1: Create a portlet.**

1. Create a portlet data source. See [Chapter 2, \*Creating and Maintaining Portlet Data Sources\*, on page 17](#), for specifics.
2. Create a portlet definition. See [Chapter 3, \*Creating and Maintaining Portlet Definitions\*, on page 47](#), for more information.

## **Step 2: Create and share a module and its Dashboard page(s).**

See [Chapter 4, \*Creating and Maintaining PPM Dashboard Pages and Modules\*, on page 137](#), to learn more about these topics.

## Related Information

The following documents also include information related to creating and sharing portlets and modules:

- *Commands, Tokens, and Validations Guide and Reference*
- *Reports Guide and Reference*
- *Security Model Guide and Reference*

The following documents also provide insights into the user experience with PPM Dashboard pages:

- *Customizing the Standard Interface*
- *Getting Started*





## 2 Creating and Maintaining Portlet Data Sources

### Overview of Portlet Data Sources

Portlet data sources contain the following components:

- The filter fields found on the edit page for the portlet.
- The permissions allowing editing of the portlet data source.
- The SQL query used by the portlet definition to retrieve data from the PPM Center database.

A portlet data source SQL query consists of the following:

- **SELECT/FROM.** This statement is used to select columns from the designated database table.

These columns are used by the portlet definition, such as a column in a list portlet or the x-axis in a bubble chart portlet.

For example:

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V
```

- **WHERE.** This clause is used to specify selection criterion.

For example:

```
WHERE LOCKED_FLAG="Y"
```

- **GROUP BY or ORDER BY.** These keywords are used to aggregate or sort the result.

For example:

```
ORDER BY OBJECT_TYPE
```

The following is a complete SQL query for a portlet data source:

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

Portlet definitions and portlet data sources have the following relationships:

- A portlet definition can be linked to only one portlet data source.
- A portlet data source can be linked to multiple portlet definitions.

Portlet data sources are constructed using the Data Source Workbench (sometimes called the Data Source Builder).

From the Data Source Workbench you can:

- Search for and view portlet data sources; see *Searching For and Viewing Existing Portlet Data Sources*
- Create new portlet data sources or modify existing ones; see *Creating or Modifying Portlet Data Sources on page 21*
- Use existing portlet data sources as the basis for new portlet data sources; see *Copying Portlet Data Sources on page 37*
- Delete existing portlet data sources; see *Deleting Portlet Data Sources on page 39*
- View portlet definition usage; see *Viewing Portlet Definition Usage on page 40*



HP-supplied portlet data sources can be copied but cannot be modified or deleted.

# Searching For and Viewing Existing Portlet Data Sources

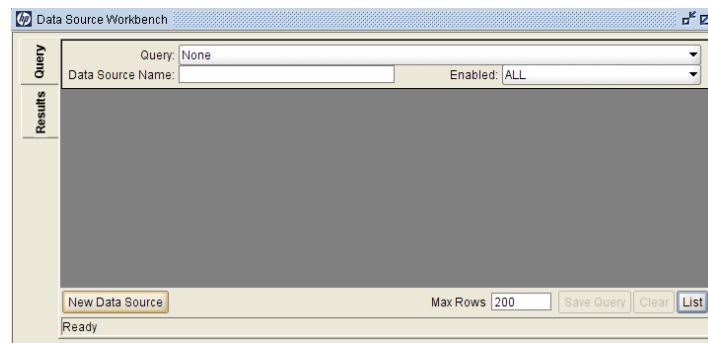
To search for a portlet data source:

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

The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.



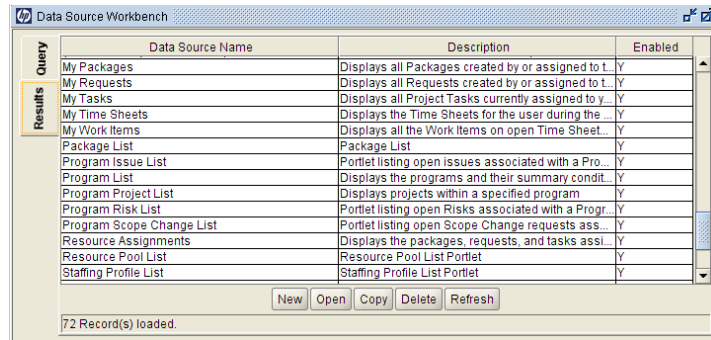
4. On the **Query** tab, provide the search criteria.



To display all portlet data sources, click **List** without providing any search criteria.

## 5. Click **List**.

The **Results** tab appears, displaying the results of the search.



Query	Data Source Name	Description	Enabled
My Packages		Displays all Packages created by or assigned to t.	Y
My Requests		Displays all Requests created by or assigned to t.	Y
My Tasks		Displays all Project Tasks currently assigned to y.	Y
My Time Sheets		Displays the Time Sheets for the user during the	Y
My Work Items		Displays all the Work Items on open Time Sheet..	Y
Package List		Package List	Y
Program Issue List		Portlet listing open issues associated with a Pro.	Y
Program List		Displays the programs and their summary condit.	Y
Program Project List		Displays projects within a specified program	Y
Program Risk List		Portlet listing open Risks associated with a Progr.	Y
Program Scope Change List		Portlet listing open Scope Change requests ass.	Y
Resource Assignments		Displays the packages, requests, and tasks assi.	Y
Resource Pool List		Resource Pool List Portlet	Y
Staffing Profile List		Staffing Profile List Portlet	Y

72 Record(s) loaded.

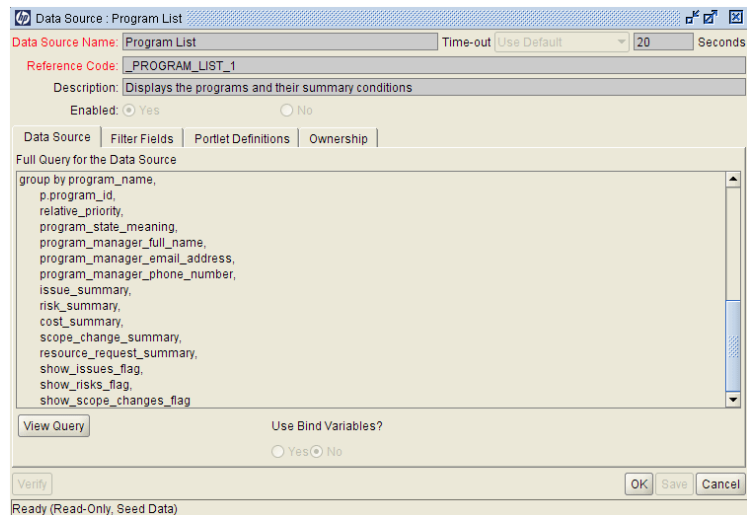
## 6. (Optional) To view a portlet data source, either:

- Double-click a portlet data source.
- Select a portlet data source and click **Open**.



Use the **shift** or **ctrl** keys to select multiple portlet data sources.

The Data Source : *<Data Source Name>* window opens.



**Data Source : Program List**

Data Source Name:  Time-out:  Seconds

Reference Code:

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

Full Query for the Data Source

```
group by program_name,
p.program_id,
relative_priority,
program_state_meaning,
program_manager_full_name,
program_manager_email_address,
program_manager_phone_number,
issue_summary,
risk_summary,
cost_summary,
scope_change_summary,
resource_request_summary,
show_issues_flag,
show_risks_flag,
show_scope_changes_flag
```

View Query  ☐ Yes ☒ No

Ready (Read-Only, Seed Data)

# Creating or Modifying Portlet Data Sources

To update an existing portlet data source, or to create an entirely new portlet data source:

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

The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

4. To:
  - Create an entirely new portlet data source, either:
    - On the **Query** tab, click **New Data Source**.
    - On the **Results** tab, click **New**.
  - Modify an existing portlet data source:
    - View the portlet data source (as described in *Searching For and Viewing Existing Portlet Data Sources* on page 19).



HP-supplied portlet data sources cannot be modified.

The Data Source : *<Data Source Name>* window opens.

Data Source : Untitled1

Data Source Name: Time-out Use Default 20 Seconds

Reference Code:

Description:

Enabled: ☐ Yes ☒ No

Data Source | Filter Fields | Portlet Definitions | Ownership

Full Query for the Data Source

SELECT

Edit Query Use Blind Variables?

☐ Yes ☒ No

Verify OK Save Cancel

Ready

5. Provide information for each of the following areas before proceeding to the next step.
- **General information.** Use these fields to set general information regarding the portlet data source, such as the name of the portlet data source, reference code, and its description. See [Completing the General Information Section on page 24](#) for details.
  - **Data Source.** Use this tab to define the columns of the portlet data source and create the SQL query. See [Completing the Data Source Tab on page 25](#) for details.
  - **Filter Fields.** Use this tab to create the filter fields found on a portlet's edit page. See [Completing the Filter Fields Tab on page 33](#) for details.
  - **Ownership.** Use this tab to set who can edit the portlet data source. See [Completing the Ownership Tab on page 36](#) for details.

The **Portlet Definitions** tab is used to identify which portlet definitions rely on this portlet data source. A new portlet data source will not have any portlet definitions associated with it.

This tab is detailed in [Viewing Portlet Definition Usage on page 40](#).



6. (Optional) At any time, you can click **Save** to commit your changes. See the tip following *Table 2-1* for additional considerations and suggestions.

You can also click **Cancel** to discard any changes. However, if you have provided a unique **Data Source Name** and clicked **Save** (at least once), the portlet data source has been created with the information provided as of the last **Save**.

7. (Optional, although highly recommended) On the Data Source : <*Data Source Name*> window, click **Verify** to validate the SQL statement.

Make any necessary corrections to the SQL by clicking **Edit Query** on the **Data Source** tab.

8. Click **OK** to save your changes and close the window.

The Data Source : <*Data Source Name*> window closes and the Data Source Workbench is updated.



On the **Results** tab, click **Data Source Name** to have the portlet data sources appear in alphabetical sequence. Clicking **Data Source Name** a second time reverses the sort order.



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

## Completing the General Information Section

To complete (or update) the general information area of the Data Source : *<Data Source Name>* window:

1. Provide the settings using the information from the following table.

Table 2-1. Portlet data source general information field descriptions

Field Name (*Required)	Description
*Data Source Name	Specify a unique name for the portlet data source. Type any alphanumeric string.
*Reference Code	A default value is provided, but you may specify a unique name for the data source reference code. PPM Center uses this code to identify specific entity types. This code does not change, regardless of whether its name is changed or translated.
Time-out	Select the timeout to use. Choices include: <ul style="list-style-type: none"><li>• Use Default</li><li>• Data Source Specific</li></ul>
Seconds	The number of seconds to wait before the portlet data source's query times out. If the <b>Time-out</b> field has a value of <b>Use Default</b> , this field displays the default time-out value used. If the <b>Time-out</b> field has a value of <b>Data Source Specific</b> , specify the time-out value. Type any integer greater than zero.
Description	Specify a description for the portlet data source. Type any alphanumeric string.
Enabled	Indicate whether or not this portlet data source is available for use.



To allow incremental saving of your settings without impacting any users, set the **Enabled** field to **No** when initially defining the portlet data source. Once the portlet data source definition is complete, reset this field to **Yes**.



2. (Optional) Click **Save** to commit these changes.

## Completing the Data Source Tab

Figure 2-1. Data Source tab for portlet data sources

The screenshot shows a window titled "Data Source : Untitled1". It contains several input fields: "Data Source Name:", "Reference Code:", and "Description:". Below these is an "Enabled:" section with radio buttons for "Yes" and "No", where "No" is selected. There are three tabs: "Data Source", "Filter Fields", and "Portlet Definitions", with "Data Source" being the active tab. Below the tabs is a large text area labeled "Full Query for the Data Source" containing the text "SELECT". At the bottom of the window, there is a "Use Bind Variables?" section with radio buttons for "Yes" and "No", where "No" is selected. This section is circled in red. Other buttons include "Edit Query", "Verify", "OK", "Save", and "Cancel". The status bar at the bottom says "Ready".

To complete (or update) the **Data Source** tab of the Data Source : *<Data Source Name>* window:

1. Set **Use Bind Variables**.

The **Use Bind Variables** option should be set to **Yes**, except when:

- Any of the filter fields are multi-select-enabled
- The portlet query statement includes tokens

2. Click **Edit Query**.

The Query Definition window opens.

The screenshot shows the 'Query Definition' window with the 'Select/From' tab selected. The window has a blue title bar and a standard Windows-style interface. Inside, there are three tabs: 'Select/From', 'Where/Filter', and 'Group By/Order By'. The 'Select' section is active, displaying instructions: 'You can use any Database columns or SQL expression to create columns for the SELECT portion of the query and enter the FROM portion directly.' Below this is a table with four columns: 'Column Name', 'Column Type', 'Description', and 'SQL'. The table is currently empty. Below the table are 'Add', 'Edit', and 'Remove' buttons. The 'From Clause' section shows a text box containing 'FROM'. Below this is an 'Enlarge' button. The 'Where/Group By/Having/Order By Clauses' section shows a text box containing 'WHERE 1=1'. At the bottom, there is a 'View Full Query' button, and on the right, 'OK', 'Apply', and 'Cancel' buttons. The status bar at the very bottom says 'Ready'.

Column Name	Column Type	Description	SQL
-------------	-------------	-------------	-----

3. Provide the following information before proceeding to the next step.

- **Select/From.** Use this tab to create the columns and add the SELECT and FROM clauses for the SQL query. See *Completing the Select/From Tab* for details.
- **Where/Filter.** (Optional) Use this tab to add WHERE clauses to the SQL query. See *Completing the Where/Filter Tab on page 29* for details.
- **Group By/Order By.** (Optional) Use this tab to add GROUP BY or ORDER BY clauses. See *Completing the Group By/Order By Tab on page 32* for details.

4. (Optional) Click **View Full Query** to see the entire SQL query—the composite of the information from each of the tabs.
5. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

## Completing the Select/From Tab

The **Select/From** tab allows you to construct the SQL query the portlet data source executes.

- **Select.** This statement identifies one or more columns to be included in the query.

For example, the following shows a complete SQL query for a portlet data source (the SELECT statement portion of the SQL query is shown in *italics*):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

- **From.** This clause selects the table from which the columns are selected.

For example, the following shows a complete SQL query for a portlet data source (the FROM clause portion of the SQL query is shown in *italics*):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER  
FROM KACC_PSFT_VC_V  
WHERE LOCKED_FLAG="Y"  
ORDER BY OBJECT_TYPE
```

To complete (or update) the **Select** section on the **Select/From** tab in the Query Definition window:

1. (Optional) To change the settings for any existing column:
  - a. Select a column.
  - b. Click **Edit** in the **Select** section.

The Data Source Column. <Column Name> windows opens.

- c. The information that should be provided depends on the Column Type. See *Supplemental Details for the Data Source Column Window on page 41* for the details associated with each column type.
  - d. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.
2. (Optional) To include a new column.
- a. Click **Add** in the **Select** section.
- The Data Source Column: New window opens.
- b. The information that should be provided depends on the Column Type. See *Supplemental Details for the Data Source Column Window on page 41* for the details associated with each column type.
  - c. Click **Save** to commit any interim changes. Click **OK** to save your changes and close the window.
3. Repeat [step 1](#) and [step 2](#) until all the desired columns are included.
4. In the **From Clause** section of the **Select/From** tab of the Query Definition window, complete the associated clause.

This is a free-form SQL entry area.



Click **Enlarge** to create a larger text entry field.

5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Where/Filter Tab

The **Where/Filter** tab allows you to construct the SQL query the portlet data source executes.

- **Where.** This clause is used to specify the selection criteria.

For example, the following shows a complete SQL query for a portlet data source (the WHERE clause portion of the SQL query is shown in italics):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

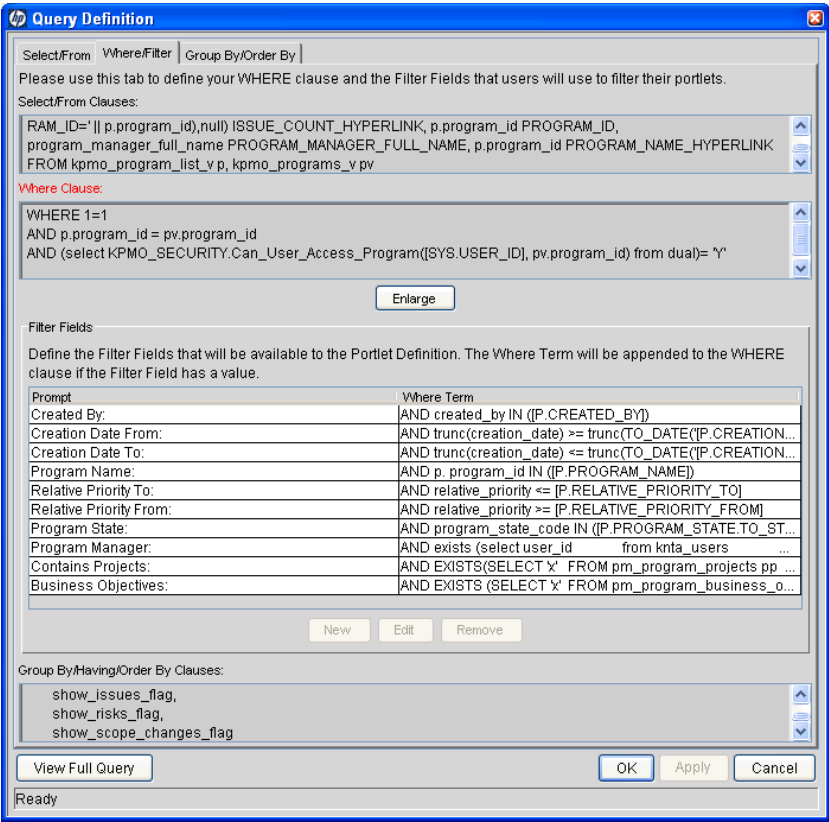
- **Filter.** This clause is used to specify the filter fields that appear on the portlet's edit page.

Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a PPM Dashboard user.

Filter field values can be used in the SQL by using the token name `P.TOKEN_NAME` or `VP.TOKEN_NAME`.



Figure 2-2. Where/Filter tab of the Query Definition window



To complete (or update) the **Where Clause** section on the **Where/Filter** tab in the Query Definition window:

1. Complete the associated clause.

The **Where Clause** section defines the WHERE clause of the portlet query. This is a free-form SQL entry area.



Click **Enlarge** to create a larger text entry field.

2. (Optional) To change the settings for an existing filter field:

- a. Select a filter field.
- b. Click **Edit** in the **Filter Fields** section.

The Filter: <Filter Field> window opens.

- c. Provide the data as detailed in [Completing the Filter Fields Tab on page 33](#).
- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.

3. To include a new filter field:

- a. Click **New** in the **Filter Fields** section.

The Filter: New window opens.

Adding filter fields here has the same results as adding filter fields using the **Filter Fields** tab as the Data Source : <Data Source Name> window.

The difference in the two areas is how the information is visually displayed.



- In the **Filter Fields** section of the Query Definition window, the SQL clauses are displayed.
- On the **Filter Fields** tab of the Data Source : <Data Source Name> window, the PPM Center entities are displayed.

- b. Provide the data as detailed in [Completing the Filter Fields Tab on page 33](#).

- c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.

4. Repeat [step 2](#) and [step 3](#) until all the desired filter fields are included.

5. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Group By/Order By Tab

The **Group By/Order By** tab allows you to refine the SQL query the portlet data source executes.

- **GROUP BY.** Adds a keyword to aggregate the result.
- **ORDER BY.** Adds a keyword to sort the result.

For example, the following shows a complete SQL query for a portlet data source (the ORDER BY portion of the SQL query is shown in *italics*):

```
SELECT OBJECT_TYPE, OBJECT_NAME, REVISION_NUMBER
FROM KACC_PSFT_VC_V
WHERE LOCKED_FLAG="Y"
ORDER BY OBJECT_TYPE
```

Figure 2-3. Group By/Order By tab of the Query Definition window

The screenshot shows the 'Query Definition' window with the 'Group By/Order By' tab selected. The window has a title bar with a blue background and a close button. Below the title bar, there are three tabs: 'Select/From', 'Where/Filter', and 'Group By/Order By'. The 'Group By/Order By' tab is active, and its content area contains a text box with a SQL query. The query is as follows:

```
_ID=' || p.program_id,null) RISK_COUNT_HYPERLINK, decode(show_risks_flag,'Y',max(risk_count,null)
RISK_COUNT, decode(show_scope_changes_flag,'Y',scope_change_summary,null) SCOPE_CHANGE_SUMMARY,
decode(show_scope_changes_flag,'Y',decode(max(scope_change_count),0,null,'/itg/web/knta/pmo/ProgramScope
ChangeListPage.jsp?PROGRAM_ID=' || p.program_id,null) SCOPE_CHANGE_COUNT_HYPERLINK,
decode(show_scope_changes_flag,'Y', max(scope_change_count,null) SCOPE_CHANGE_COUNT,
program_state_meaning PROGRAM_STATE_MEANING, decode(show_issues_flag,'Y',max(issue_count,null)
ISSUE_COUNT, program_name PROGRAM_NAME, relative_priority RELATIVE_PRIORITY,
program_manager_full_name || ' ' || program_manager_email_address || ' ' || program_manager_phone_number
PROGRAM_MANAGER_INFO, decode(show_issues_flag,'Y',issue_summary,null) ISSUE_SUMMARY,
decode(show_issues_flag,'Y',decode(max(issue_count),0,null,'/itg/web/knta/pmo/ProgramIssueListPage.jsp?PROG
RAM_ID=' || p.program_id,null) ISSUE_COUNT_HYPERLINK, p.program_id PROGRAM_ID,
program_manager_full_name PROGRAM_MANAGER_FULL_NAME, p.program_id PROGRAM_NAME_HYPERLINK
FROM kpmo_program_list_v p, kpmo_programs_v pv
WHERE 1=1
AND p.program_id = pv.program_id
AND (select KPMO_SECURITY.Can_User_Access_Program((SYS.USER_ID), pv.program_id) from dual)= 'Y'
```

Below the text box, there are three sections: 'Group By Clause:', 'Having Clause:', and 'Default Order By Clause:'. Each section has a list box with a vertical scrollbar. The 'Group By Clause:' list box contains the following items: 'resource\_request\_summary', 'show\_issues\_flag', 'show\_risks\_flag', and 'show\_scope\_changes\_flag'. The 'Having Clause:' and 'Default Order By Clause:' list boxes are empty. At the bottom of the window, there are three buttons: 'View Full Query', 'OK', and 'Apply', and a 'Cancel' button. The status bar at the bottom left says 'Ready'.



To complete (or update) the **Group By/Order By** tab in the Query Definition window:

1. In the **Group By Clause** section, provide the GROUP BY or ORDER BY terms.

This is a free-form SQL entry area.

2. In the **Having Clause** section, provide the HAVING terms.

This is a free-form SQL entry area.

3. In the **Default Order By Clause** section, provide the default ORDER BY terms.

This is a free-form SQL entry area.

4. Click **Apply** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Filter Fields Tab

Figure 2-4. Filter Fields tab for portlet data source

**Data Source : Program List**

Data Source Name: Program List Time-out: Use Default 20 Seconds

Description: Displays the programs and their summary conditions

Enabled: ☒ Yes ☐ No

Seq	Name	Token	Validation
1	Created By:	CREATED_BY	KNTA - User Id - Enabled
2	Creation Date From:	CREATION_DATE_FROM	Date
3	Creation Date To:	CREATION_DATE_TO	Date
4	Program Name:	PROGRAM_NAME	PMO - Programs
5	Relative Priority To:	RELATIVE_PRIORITY_TO	Numeric Text Field (Positive)
6	Relative Priority From:	RELATIVE_PRIORITY_FR...	Numeric Text Field (Positive)
7	Program State:	PROGRAM_STATE	PMO - Program State AC
8	Program Manager:	PROGRAM_MANAGER	KNTA - User Names - Enabled
9	Contains Projects:	CONTAINS_PROJECTS	(***Deprecated 7.0***) DRV - Master Projects - E...
10	Business Objectives:	BUSINESS_OBJECTIVES	PMO - Business Objectives

Buttons: New View Remove

Buttons: Verify OK Save Cancel

Ready

To complete (or update) the Filter Fields tab in the Data Source : <Data Source Name> window:

1. (Optional) To change the settings for an existing filter field:
  - a. Select a filter field.
  - b. Click **Edit**.

The Filter: <Filter Field> window opens.

The screenshot shows a 'Filter: New' dialog box. It has a title bar with a blue icon and the text 'Filter: New'. The main area contains several input fields and checkboxes. 'Field Name' and 'Token' are text boxes. 'Description' is a text box. 'Validation' is a text box with a small icon to its right. 'Component Type' is a dropdown menu set to 'None'. 'Multiselect' has two radio buttons, 'Yes' and 'No', with 'No' selected. 'Required' has two radio buttons, 'Yes' and 'No', with 'No' selected. 'Enabled' has two radio buttons, 'Yes' and 'No', with 'Yes' selected. Below these is a large empty text area with the label 'When this filter field has a value, append to Where Clause:'. At the bottom are buttons for 'View Full Query', 'OK', 'Add', and 'Cancel'. A status bar at the very bottom says 'Ready'.

- c. Provide the filter criteria using the information from the following table.



Each filter field is appended to the WHERE clause of the portlet query, but only when the filter field is being used by a PPM Dashboard user.

Filter field values can be used in the SQL by using the token name `P . TOKEN_`NAME or `VP . TOKEN_`NAME.

Field Name (*Required)	Description
*Field Name	Specify a name for the filter field that should be shown in the portlet's edit page. Type any alphanumeric string.
*Token	Specify the token for the filter field.
Description	Specify a description for the filter field. Type any alphanumeric string.

Field Name (*Required)	Description
*Validation	Select the validation for the filter field. Choices are limited to those validations available on your PPM Center instance.
Multiselect	Indicate whether or not the filter field is enabled for multi-select.
Required	Indicate whether or not the filter field is required on the portlet's edit page.
Enabled	Indicates whether or not the filter field is enabled.
*When this filter has a value, append to Where Clause	Provide the AND clause that is appended to the portlet's WHERE clause if you provide a value in this filter field.

- d. Click **Apply** to commit any interim changes. Click **OK** to save your changes and close the window.
2. (Optional) To include a new filter field:
  - a. Click **New**.  
The Filter: New window opens.
  - b. Provide the filter criteria using the information from the previous table.
  - c. Click **Add** to commit any interim changes. Click **OK** to save your changes and close the window.
3. Repeat [step 1](#) and [step 2](#) until all the desired filter fields are included.
4. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

## Completing the Ownership Tab

Only members of the security groups specified in the Ownership window can edit, copy, or disable a specific portlet. If a security group is disabled or the System: Edit Portlet Definition access grant is removed, that group no longer has access to the portlet.

If no ownership groups are associated with the entity, the entity is considered global and any user with the proper edit access grant for the entity can edit, copy, or disable it. Users with the System: Ownership Override access grant can access configuration entities even if the user is not a member of one of the ownership groups and does not have the specific edit access grant.



For more information concerning access grants, refer to the *Security Model Guide and Reference*.

Figure 2-5. Ownership tab for the portlet data source

Data Source : Program List

Data Source Name: Program List Time-out: Use Default 20 Seconds

Reference Code: PROGRAM\_LIST\_1

Description: Displays the programs and their summary conditions

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

Give ability to edit this Data Source to :

☒ All users with the Edit Portlet Definition Access Grant

☐ Only groups listed below that have the Edit Portlet Definition Access Grant

Security Group	Description
----------------	-------------

Add Remove

Verify OK Save Cancel

Ready (Read-Only, Seed Data)

To complete (or update) the **Ownership** tab in the Data Source : *<Data Source Name>* window:

1. Indicate whether to allow changes to the portlet data source to be made by:
  - All users with the System: Edit Portlet Definition access grant
  - Only groups listed below that have the System: Edit Portlet Definition access grant

Use the **Add** and **Remove** buttons to refine the list of allowed users.

2. Click **Save** to commit your changes. Click **OK** to save your changes and close the window.

## Copying Portlet Data Sources

To create a new portlet data source using an existing portlet data source as the basis:

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

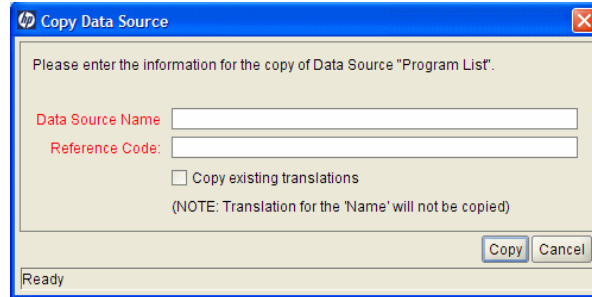
The PPM Workbench opens.

3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

4. Search for and select a portlet data source (see [Searching For and Viewing Existing Portlet Data Sources](#) on page 19).

5. Click **Copy**. The Copy Data Source window opens.

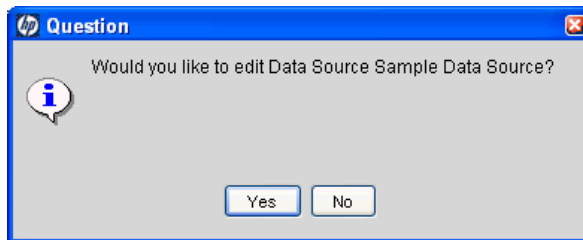


6. In the **Data Source Name** field, specify a unique name for the portlet data source.

In the Reference Code field, specify a unique reference code for the portlet data source.

If your PPM Center instance supports multiple languages and the data source is defined in a language other than your session language, the **Copy existing translations** checkbox is enabled. To copy all of the content that is translated for the data source, select this checkbox. To copy only the content that has been translated to your session language, do not select the checkbox. For more information, see *Multilingual User Interface Guide*.

7. Click **Copy**. The Question window opens.



8. Click **Yes** if you would like to edit the portlet data source. Otherwise, click **No**.
9. (Optional) If you clicked **Yes** in the previous step, modify the portlet data source using the information described in *Creating or Modifying Portlet Data Sources* on page 21.

# Deleting Portlet Data Sources

- HP-supplied portlet data sources cannot be deleted.

To delete an existing portlet data source:

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

The PPM Workbench opens.

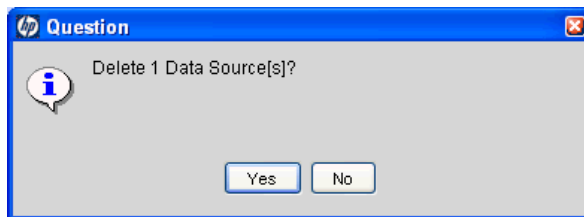
3. From the shortcut bar, select **Dashboard > Data Sources**.

The Data Source Workbench opens.

4. Search for and select one or more portlet data sources (see [Searching For and Viewing Existing Portlet Data Sources](#) on page 19).

5. Click **Delete**.

The Question window opens.



6. Click **Yes** to remove the portlet data source(s). Otherwise, click **No**.

If you clicked **Yes**, the Data Source Workbench is updated (and the deleted portlet data source no longer appears in the list).

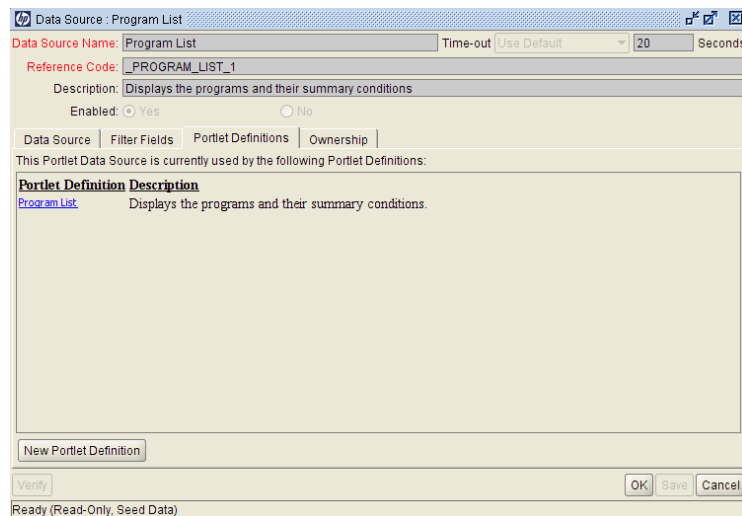
## Viewing Portlet Definition Usage

The **Portlet Definitions** tab allows you to view all of the portlet definitions currently linked to the portlet data source.

From the Portlet Data Source window, on the **Portlet Definitions** tab, you can:

- View all of the portlet definitions linked to the portlet data source.  
Remember that portlet definitions and portlet data sources have the following relationships:
  - A portlet definition can be linked to only one portlet data source.
  - A portlet data source can be linked to multiple portlet definitions.
- Open the portlet definition by clicking on the portlet definition name. This opens the Portlet Definition wizard. The Portlet Definition wizard is populated with the information for the selected portlet definition.
- Create a new portlet definition by clicking **New Portlet Definition**. This opens the Portlet Definition wizard.

Figure 2-6. Portlet Data Source window, Portlet Definitions tab





# Supplemental Details for the Data Source Column Window

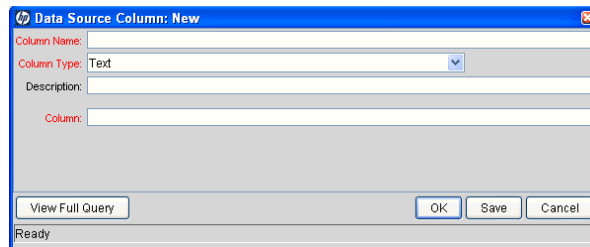
Adding columns to the Query Definition window relies on the Data Source Column window. The fields of the Data Source Column window vary, depending on the column type selected.

See the associated details for the following column types:

- Text, Date, Number, or Summary Condition/Exception, see [Text-Based Column Types Details](#)
- Hyperlink, see [Hyperlink Column Type Details](#)
- Currency, see [Currency Column Type Details](#) on page 45

## Text-Based Column Types Details

Figure 2-7. Text-based column types in Data Source Column window



The screenshot shows a dialog box titled "Data Source Column: New". It contains the following fields and controls:

- Column Name:** A text input field.
- Column Type:** A dropdown menu currently showing "Text".
- Description:** A text input field.
- Column:** A text input field.
- Buttons:** "View Full Query", "OK", "Save", and "Cancel".
- Status Bar:** Displays "Ready".

Table 2-2. Text-based column types field descriptions

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select one of the following: <ul style="list-style-type: none"> <li>• Text</li> <li>• Date</li> <li>• Number</li> <li>• Summary Condition/Exception</li> </ul>
Description	Specify a brief description of the column. Type any alphanumeric string.
*Column	Specify the database column name used for the column. Choices are limited to the column names available on your PPM Center instance. <b>Note:</b> The type of the database column specified should match the Column Type selected. If the types do not match, sorting of this column in the portlet may not behave as expected (sorting is based on the type of the database column). For example, if you select a Column Type of Number, but the type of the database column is text, sorting of this column in the portlet is based on text rather than numbers. Use a function, such as <code>to_number</code> , to change the database column type to match the selected Column Type.

## Hyperlink Column Type Details

Figure 2-8. Hyperlink column type in the Data Source Column window

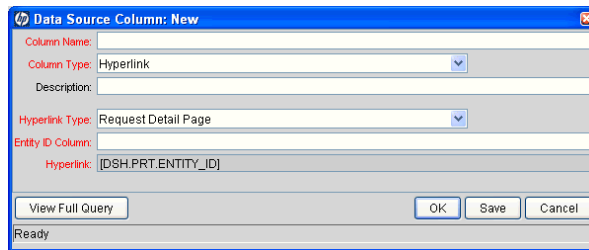


Table 2-3. Hyperlink column type field description (page 1 of 2)

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select <b>Hyperlink</b> .
Description	Specify a brief description of the column. Type any alphanumeric string.
*Hyperlink Type	<p>Select the type of hyperlink to create from this column.</p> <p>Choices include:</p> <ul style="list-style-type: none"><li>• Request Detail Page</li><li>• Package Detail Page</li><li>• Task Detail Page</li><li>• Project Detail Page</li><li>• Project Overview Page</li><li>• Custom Hyperlink</li></ul> <p>When <b>Custom Hyperlink</b> is selected, the <b>Hyperlink</b> field becomes editable and required. Otherwise, the <b>Hyperlink</b> field is read-only and displays a preview of the link that is created (for example, /itg/crt/RequestDetail.jsp?REQUEST_ID=[PRT.ENTITY_ID]).</p>

Table 2-3. Hyperlink column type field description (page 2 of 2)

Field Name (*Required)	Description
*Entity ID Column	<p>Specify the SQL expression used to make a column in the final query.</p> <p>This column should contain values which are Request IDs (such as, Request Detail Page type Hyperlinks).</p> <p>In the case of the <b>Custom Hyperlink</b>, the values from this column are used to resolve the token <code>PRT.ENTITY_ID</code>, which can be used in the text of the hyperlink.</p>
*Hyperlink	<p>Specify the actual hyperlink text, which should be of one of the following forms:</p> <ul style="list-style-type: none"> <li>• <code>&lt;PPM_Home&gt;/some/page</code></li> <li>• <code>http://machine.server.com/page.html</code></li> </ul> <p>The valid tokens are <code>DSH.PRT.ENTITY_ID</code>, <code>DSH.PRT.ENTITY_ID.TO_URL</code>, and <code>SYS.USERNAME</code>.</p>

## Currency Column Type Details

Figure 2-9. Currency column type in the Data Source Column window

The screenshot shows a dialog box titled "Data Source Column: New". It contains several input fields: "Column Name" (empty), "Column Type" (set to "Currency"), "Description" (empty), "Base Value Column" (empty), "Currency ID Column" (empty), and "Local Value Column" (empty). There are buttons for "View Full Query", "OK", "Save", and "Cancel". The status bar at the bottom left indicates "Ready".

Table 2-4. Currency column type field descriptions (page 1 of 2)

Field Name (*Required)	Description
*Column Name	Specify the name of the column. Type any alphanumeric string.
*Column Type	Select <b>Currency</b> .
Description	Specify a brief description of the column. Type any alphanumeric string.

Table 2-4. Currency column type field descriptions (page 2 of 2)

Field Name (*Required)	Description
*Base Value Column	<p>Specify the column (that displays in the currency column) whose values are costs in the base currency.</p> <p>These values are displayed if the user has configured their PPM Dashboard to show costs in the system's base currency.</p> <p>For this column to sort correctly, it must be a number. If necessary, use the function <code>to_number</code> to change the value to a number.</p>
Currency ID Column	<p>Specify the column whose values are the ID of the local currency.</p> <p>This value is never displayed; however, it is used to determine how the local currency value (see <a href="#">Local Value Column</a>) is formatted.</p>
Local Value Column	<p>Specify the column (that displays in the currency column) whose values are costs in the local currency.</p> <p>These values are displayed (and formatted appropriately for the specified currency) if the user has configured their PPM Dashboard to show costs in the local currency. That is, the user must select <b>Local Currency</b> from the Dashboard Cost Display section from the Edit My Profile page (<b>Open &gt; Administration &gt; Edit My Profile</b>).</p> <p>For this column to sort correctly, it must be a number. If necessary, use the function <code>to_number</code> to change the value to a number.</p>

# 3 Creating and Maintaining Portlet Definitions

## Overview of Portlet Definitions

PPM Center portlets include:

- **Builder Portlets.** These are portlets created with the Portlet Definition wizard and Data Source Workbench.

HP supplies several builder portlets as part of PPM Center. You can create your own custom builder portlets using the Portlet Definition wizard and Data Source Workbench.

- **Java Portlets.** These portlets are written in Java and imported into PPM Center using the Portlet Definition wizard. Java portlets consist of a Java portlet definition and the Java code.
- **WSRP Portlets.** These portlets are defined by a producer Web service and imported into PPM Center using the Portlet Definition wizard. WSRP portlets have a WSRP portlet definition that references the URL of the WSRP portlet. That is, WSRP portlet definitions are a proxy to a remote portlet definition maintained by the producer and accessible through a Web service.

These PPM Center portlets rely on the following types of portlet definitions:

- **HP-supplied portlet definitions.** These portlet definitions are provided by HP as part of a PPM Center application.
- **HP-imported portlet definitions.** These portlet definitions are imported by HP as part of a PPM Center application.

- **Standard portlet definitions.** These portlet definitions are created using the Portlet Definition wizard (see *Creating New Portlet Definitions on page 53*).
- **Java portlet definitions.** These portlet definitions are imported using the Import Portlet Definition wizard (see *Importing Java Portlet Definitions on page 69*), maintained using the Portlet Definition wizard (see *Creating New Portlet Definitions on page 53*), and include portlet definitions such as RSS Reader and URL.
- **WSRP portlet definitions.** These portlet definitions are imported using the Import Portlet Definition wizard (see *Importing WSRP Portlet Definitions on page 73*) and maintained using the Portlet Definition wizard (see *Creating New Portlet Definitions on page 53*).

## HP-Supplied Portlet Definitions

PPM Center applications, such as HP Portfolio Management and HP Demand Management, may include their own portlet definitions.

These HP-supplied portlet definitions:

- Cannot be deleted
- Cannot have their displays or preferences changed in any way
- Can be modified by:
  - Copying portlet definitions
  - Changing user and administrator access
  - Changing user help (for builder portlets only)



## HP-Imported Portlet Definitions

PPM Center applications may include their own imported Java or WSRP portlet definitions.

These HP-imported portlet definitions:

- Cannot be deleted
- Can be modified by:
  - Changing user and administrator access
  - Changing general information

## Imported Java and WSRP Portlet Definitions

Any Java portlet definitions or WSRP portlet definitions that you have imported using the Import Portlet Definition wizard:

- Can be deleted
- Can be modified by:
  - Configuring user and administrator access
  - Changing general information

## Standard Portlet Definitions

Any standard portlet definitions that you have created using the Create Portlet Definition wizard:

- Can be deleted
- Can have *any* of their settings changed



These portlet definitions are sometimes termed “builder portlet definitions” since they are *built* using the Create Portlet Definition wizard.

# Searching for Existing Portlet Definitions

To search for an existing portlet definition.

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

The Configure Portlet Definitions page appears.

Configure Portlet Definitions

Search for a Portlet Definition to Configure Reset Form

Name starts with:  Type:

Category:  Enabled:

Created By:

Sort By:  ☒ Ascending ☐ Descending Results Displayed Per Page:  50

Search

3. Provide the search criteria using the information from the following table.

Field Name (*Required)	Description
Name starts with	Specify a string. The search results display all portlets whose name starts with the specified string. Type any alphanumeric string (up to 255 characters in length).

Field Name (*Required)	Description
Type	<p>Select the type of portlet definition:</p> <ul style="list-style-type: none"> <li>• List</li> <li>• Pivot Table</li> <li>• Bar Chart</li> <li>• Clustered Bar Chart</li> <li>• Stacked Bar Chart</li> <li>• Pie Chart</li> <li>• Line Chart</li> <li>• XY Chart</li> <li>• Radar Chart</li> <li>• Bubble Chart</li> <li>• Java</li> <li>• WSRP</li> </ul>
Category	<p>Select one or more categories. Choices are limited to the categories available on your PPM Center instance.</p>
Enabled	<p>Indicated whether or not the portlet definition is enabled.</p>
Created By	<p>Select the user who created the module.</p>
Sort By	<p>Select the sort criteria. Choices include:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Type</li> <li>• Category</li> <li>• Enabled</li> </ul>
Ascending/Descending	<p>Indicate the sorting sequence.</p>
*Results Displayed Per Page	<p>Specify the maximum number of search results to display on a page. Type any positive integer.</p>



Click **Reset Form** if you would like to clear your current search criteria.

#### 4. Click **Search**.

The Configure Portlet Definitions page is updated to include the search results which are displayed in the **Configure Portlet Definitions** section.

##### Configure Portlet Definitions

Configure Portlet Definitions							Showing 1 to 18 of 81		Prev	Next
Name	Description	Type	Category	Last Updated On	Enabled					
<input checked="" type="checkbox"/> Analyze Assignment Load	Analyze Assignment Load Portlet.	Java	Resource Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Analyze Resource Pools	Analyze Resource Pools Portlet	Java	Resource Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Approve Time Sheets	Displays Time Sheets that need approval by the current user.	Java	Time Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Assignment Queue	Provides quick assignment capabilities from the Dashboard for Demand Managers.	Java	Requests	4/20/09	Yes					
<input checked="" type="checkbox"/> Budget by Asset Class	A graphical view that shows the breakdown of budget by Asset Class for a what-if scenario from an existing Scenario Comparison.	Java	Portfolio Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Budget by Business Objective	A graphical view that shows the breakdown of budget by Business Objective for a what-if scenario from an existing Scenario Comparison.	Java	Portfolio Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Budget by Project Class	A graphical view that shows the breakdown of budget by Project Class for a what-if scenario from an existing Scenario Comparison.	Java	Portfolio Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Budget Summary	A graphical view that shows the budget summary of a what-if scenario from an existing Scenario Comparison.	Java	Portfolio Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Capitalized Project Breakdown	Can be set up to show the source data for (capitalized) projects displayed in graphical portlets (Total Exposure, Impairment Risks and Capitalized Project Timelines).	Java	Portfolio Management, Financial Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Capitalized Project Timelines	A graphical display of projects with capitalized costs showing their start date, end date and health.	Java	Portfolio Management, Financial Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Consolidated Demand	Provides a graphical overview of the Demand placed on your organization.	Java	Requests	4/20/09	Yes					
<input checked="" type="checkbox"/> Cost Benefit Analysis	A graphical view that shows cost-benefit analysis for a what-if scenario from an existing Scenario Comparison.	Java	Portfolio Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Current Portfolio Map	This portlet gives a graphical view of the current portfolio of Projects and Assets.	Java	Portfolio Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Demand by Category	Provides a graphical summary of the Demand placed on an organization that can be grouped by common Demand Categories.	Java	Requests	4/20/09	Yes					
<input checked="" type="checkbox"/> Demand List	Provides a personalizable list of the Demand placed on an organization or individual.	Java	Requests	4/20/09	Yes					
<input checked="" type="checkbox"/> EV Summary	Displays work plan-level Earned Value metrics for the project.	Java	Project Overview	4/20/09	Yes					
<input checked="" type="checkbox"/> Impairment Risks	A graphical view of active projects that have capitalized costs, chosen by project health and broken out project.	Java	Portfolio Management, Financial Management	4/20/09	Yes					
<input checked="" type="checkbox"/> Issue List	Portlet listing open issues associated with a Program	List	Requests, Program Management	4/20/09	Yes					

Showing 1 to 18 of 81 Prev Next

Search for a Portlet Definition to Configure

Reset Form

Name starts with:  Type:

Category:  Enabled:

Created By:

Sort By:  ☐ Ascending ☐ Descending \*Results Displayed Per Page:

Search

From the Configure Portlet Definitions page you can:

- Select a portlet definition by clicking the link associated with the desired portlet definition (in the **Configure Portlet Definitions** section).
- Refine your search by providing additional search criteria as detailed in [step 3 on page 50](#).

# Creating New Portlet Definitions

To create an entirely new standard portlet definition, use the Create Portlet Definition wizard.

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Portlet Definitions > Create a Portlet Definition**.









The Choose Portlet Type step of the Create Portlet Definition page appears.

**Create Portlet Definition**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Choose Portlet Type**

<input checked="" type="radio"/> List		Displays data in rows and columns.
<input type="radio"/> Pivot Table		Displays multidimensional aggregations over tabular data
<input type="radio"/> Bar Chart		Displays data in either vertical or horizontal bars.
<input type="radio"/> Clustered Bar Chart		Displays data in either vertical or horizontal bars; bars can be grouped into clusters.
<input type="radio"/> Stacked Bar Chart		Displays data in either vertical or horizontal bars; each bar can be subdivided into categories.
<input type="radio"/> Pie Chart		Typically used to show percentages of a whole.
<input type="radio"/> Line Chart (including subtypes)		Typically used to show changes in data over time. Subtypes include an XY Chart (also known as a Scatter Chart) and a Radar Chart (also known as a Spider Chart which is often used for data that have a natural cycle of change).
<input type="radio"/> Bubble Chart		Typically used to plot points on two axes such as "value" vs. "risk." Bubble size and color indicate additional dimensions of information.

---

Cancel ◀ Back Next ▶

3. Select the type of portlet to create.

Portlet Type	Description
List	Data is presented in tabular form using rows and columns.
Pivot Table	Data is aggregated in a table. Rows, columns, tables, and measurements can be grouped into categories.
Bar Chart	Data is displayed as vertical or horizontal bars. Each bar represents a single item.
Clustered Bar Chart	Data is displayed as vertical or horizontal bars. Bars can be grouped into categories.
Stacked Bar Chart	Data is displayed as vertical or horizontal bars. Each bar can be subdivided into categories.
Pie Chart	Data is displayed as a percentage of a whole.
Line Chart	Data is displayed to show changes over time.
Bubble Chart	Four dimensions of data are displayed on an x-y axis. The x-y axis location pinpoints a spot while the size and color of the bubble indicates additional dimensions of the information.

4. Click **Next** (found near the bottom of the page).

The Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

**Portlet Information**

\*Name:

Category:  [Manage Categories](#)

Description:

Default Width:

Enabled: ☒ Yes ☐ No

**Portlet Information**

\*Data Source:  [New Data Source](#)

5. Provide the portlet details using the information from the following table.

Field Name (*Required)	Description
<b>Portlet Information section</b>	
*Name	Specify a unique name for the portlet. Type any alphanumeric string (up to 80 characters in length).
Category	Select one or more categories. Choices are limited to those categories available on your PPM Center instance.
Manage Categories	Click to add or delete portlet categories. See <a href="#">Managing Portlet Categories on page 96</a> for details.
Description	Specify the portlet definition. Type any alphanumeric string (up to 1,800 characters in length).
Default Width	Select the default width of the portlet. Choices include: <ul style="list-style-type: none"> <li>• Narrow</li> <li>• Wide</li> </ul> Note that the default width can be changed when the portlet is personalized.
Enabled	Indicate whether or not the portlet can be added to the Dashboard page. If a portlet is added to a PPM Dashboard, then disabled, the portlet remains on the Dashboard page.
<b>Data Source section</b>	
*Data Source	Select the data source for the current portlet. The portlet data source defines the columns or chart entity, and preferences fields for a portlet definition.
New Data Source	Click to open the PPM Workbench and create a new portlet data source.

6. Click **Next**.

The Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Display Columns**

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

**Add Column** **Edit** **Delete**

Click on a column to select ☐ User Sortable

---

**Columns Displayed by Default:**

▲ Tasks ▲ OPEN\_TASKS ▼

---

**Columns Displayed by Default in Maximized View Only:**

▲ ▼

---

**Columns Available for Display:**

**Arrange Data**

Default Sort By:  ▼ ☒ Ascending ☐ Descending

\*Default Rows Displayed:  5 In Normal View  
 50 In Maximized View

---

**Cancel** **Back** **Next**

7. Provide the appropriate information on the Create Portlet Definition (<Portlet Type>) page.

The information needed to create the different portlet types vary significantly. Field descriptions are provided in the [Supplemental Details for the Set Up Display Option Step on page 98](#) section.

- For list portlets, see [List Portlet on page 98](#).
- For pivot table portlets, see [Pivot Table Portlet on page 107](#).
- For bar charts, see [Bar Chart Portlet on page 113](#).
- For clustered bar charts, see [Clustered Bar Chart Portlet on page 115](#).
- For stacked bar charts, see [Stacked Bar Chart Portlet on page 118](#).
- For pie charts, see [Pie Chart Portlet on page 120](#).



- For line charts, see [Line Chart Portlet](#) on page 122.
- For bubble charts, see [Bubble Chart Portlet](#) on page 129.

8. Click **Next**.

The Define Preferences step of the Create Portlet Definition (<Portlet Type>) page appears.

**Create Portlet Definition (List)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ **4. Define Preferences**

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Preference Form Layout**

Click and drag to select and move fields

Drag outside box to cancel movement

Resource: ◀▶ [Sizing Icon]	Package Workflow ◀▶ [List Icon]
Request Type: ◀▶ [List Icon]	*Task Window (Starting Before Current Date+X Days): ◀▶ [Text Input]
Limit by Task State: ◀▶ [List Icon]	Resource Group: ◀▶ [List Icon]

**Edit**

☒ Show Preferences summary on this portlet (user can choose to hide it)

☐ Require user to edit preferences before viewing portlet for the first time

**Cancel** **Back** **Next** **Preview** **Finish**

Initially, all preference fields are mapped from the portlet data source, which indicates the name of the field, type of the field (such as auto-complete or text field), and any default value. Note that preferences requiring default values are shown with a red asterisk.

- (Optional) To change the width of preferences, click the **Sizing** icon (◀▶).
- (Optional) To rearrange preferences:
  - Select a preference.
  - Drag and drop the preference into the desired location.

c. (Optional) To edit preferences:

- i. Select a preference.
- ii. Click **Edit**.

The Edit Portlet Preference: *<Preference>* dialog box opens.

hp Close Window X


Edit Portlet Preference: TASK\_STATE\_ID

Field Prompt:

Component Type: Multi-Select Auto Complete

Display:

- ☒ Editable - Allow user to edit
- ☐ Required and Editable - Require user to enter a value
- ☐ Non-Editable - Only allow user to view
- ☐ Hidden - Not visible to user

Default Value:  

Done Cancel

Close Window X

- iii. Provide the preference details using the information from the following table.

Field Name (*Required)	Description
*Field Prompt	Specify the prompt that will appear on the Portlet Preference page. Type any alphanumeric string (up to 200 characters in length).
Display	Select the manner in which this preference is displayed. Choices could include one or more of the following (depending on the component type): <ul style="list-style-type: none"><li>• <b>Editable.</b> Allows the user to edit the field.</li><li>• <b>Required and Editable.</b> Requires the user to provide a value.</li><li>• <b>Non-Editable.</b> Allows user to view, but not edit the field.</li><li>• <b>Hidden.</b> The information is not viewable (or editable) by the user.</li></ul> This field is required if a default value is required by the portlet data source.
Default Value	Specify the default value that is shown when editing the portlet. This field is required if a default value is required by the portlet data source.

- iv. Click **Done**.

The changes to preference are saved and the Edit Portlet Preference: <Preference> dialog box closes.

- d. (Optional) Select **Show Preferences summary on this portlet (user can choose to hide it)** if you want the user to have this capability.
- e. (Optional) Select **Require user to edit preferences before viewing portlet for the first time** if you want to force the user to edit their preferences.

9. If you do not want to change any of the remaining default values, click **Finish**. Otherwise, click **Next**.

The Configure Portlet Communication step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Portlet Communication Subscribers**

Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.

☐ Enable portlet communication (user can choose to disable it)

\*Event topic:  [Manage event topics](#)

---

[Cancel](#) [Back](#) [Next](#) [Preview](#) [Finish](#)

- a. (Optional) Select **Enable portlet communication (user can choose to disable it)** if you want the user to have this capability.
- b. If portlet communication is enabled, you must provide an event topic. Use the auto-complete button to provide an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

10. If you do not want to change any of the remaining default values, click **Finish**. Otherwise, click **Next**.

The Configure Access step of the Create Portlet Definition (<Portlet Type>) page appears.

**Create Portlet Definition (List)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ **6. Configure Access** ▶ 7. Add User Help

---

**Configure Access**

User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

Security Type	Name
All Users	

Give Access to: User

Administrator Access

Users specified below will have access to modify this Portlet Definition.

Security Type	Name
All Portlet Definition Administrators	

Give Access to: User

WSRP Access

☐ Make Portlet available to WSRP Consumers

Drilldown Access

☒ This portlet supports drilling into

Cancel Back Next Preview Finish

a. (Optional) In the **User Access** section:

- Select one or more access grants (privileges) a user must have in order to add the portlet to a Dashboard page.
- Select one or more users or security groups allowed to add the portlet to a Dashboard page.

By default, access is given to all users belonging to the PPM User security group.



Whenever there is no specific (individual or group) user access, this setting reverts to its default.

b. (Optional) In the **Administrator Access** section:

- Select one or more users or security groups allowed to modify the portlet.

By default, access is given to all users belonging to the PPM User Admin security group.



Whenever there is no specific (individual or group) administrator access, this setting reverts to its default.

c. (Optional) In the **WSRP Access** section:

- Select if you want to make the portlet available to WSRP consumers.
- Click **Preview** to review the layout and make sure that you have presented the information as desired.

d. (Optional) In the Drilldown Access section:

- Select if you want the portlet to support drill-down access.

11. Click **Next**.

The changes are added to the new portlet definition and the Add User Help step of the Create Portlet Definition (<Portlet Type>) page appears.

Create Portlet Definition (List)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

**Portlet Help**

Help content will be available to end users when viewing this portlet on their dashboard, and when adding portlets during Dashboard Personalization.

Portlet Help Text:

Preview Help

Cancel Back Next Preview Finish

12. In the **Portlet Help Text** field, type the help text.

This field supports HTML. Use valid HTML tagging when typing the information that defines the functionality of the portlet and lists and describes all of the portlet fields.

Click **Preview Help** to review the help content make sure that you have presented the information as desired.

Click **Preview** to review the layout and make sure that you have presented the information as desired.

13. Click **Finish**.

The help data is saved, the portlet definition is created, and a status message displayed.

Create Portlet Definition

Sample has been successfully created.

[Configure Sample](#)  
[Create another Portlet Definition](#)  
[Search for other Portlet Definitions to configure](#)

14. Review the information to make determine if your portlet definition was successfully created.



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

## Copying Portlet Definitions

You can copy a portlet definition to use as the basis for another portlet definition.



Java portlet definitions and WSRP portlet definitions cannot be copied.

To copy a portlet definition:

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

The Configure Portlet Definitions page appears, as shown in [step 2 on page 50](#).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see *Searching for Existing Portlet Definitions on page 50*.

The Configure Portlet Definition: <Portlet Definition> page appears.



If your PPM Center instance supports multiple languages and the portlet definition is defined in a language other than your session language, you cannot edit the portlet definition. For more information, click **here** in the header or see *Multilingual User Interface Guide*.



4. Click **Copy**.

The Configure Portlet Definition: *<Portlet Definition>* page is updated with the copied information.

5. Provide the portlet information using the information available from the following steps: Enter Portlet Information ([step 4 on page 54](#)), Set up Display Options ([step 6 on page 56](#)), Define Preferences ([step 8 on page 57](#)), Configure Portlet Communication ([step 9 on page 60](#)), Configure Access ([step 10 on page 61](#)), and Add User Help ([step 11 on page 63](#)).



Click **Preview** to review the layout and make sure that you have presented the information as desired.

6. Click **Create**.

7. (Optional) Make any additional modifications and click **Save**.

8. Click **Done** to return to the Configure Portlets Definitions window.

## Modifying Portlet Definitions

To change an existing portlet definition:

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

The Configure Portlet Definitions page appears, as shown in [step 2 on page 50](#).

### 3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see [Searching for Existing Portlet Definitions](#) on page 50.



If your PPM Center instance supports multiple languages and the portlet definition is defined in a language other than your session language, you cannot edit the portlet definition. For more information, click **here** in the header or see *Multilingual User Interface Guide*.

The Configure Portlet Definition: *<Portlet Definition>* page appears.

Configure Portlet Definition: Time Sheet Totals for Direct Reports

This is a built-in Portlet Definition. It cannot be deleted.

PreviewSaveDoneCancel

Portlet Type: ListData Source: Time Sheet Totals for Direct Reports

Created By: seed\_data seed\_dataLast Modified By: seed\_data seed\_dataLast Modification Date: 2/20/2008

Name: Time Sheet Totals for Direct Reports

Category: Time Management

Description: Shows the total time entered by all the direct reports for a specific manager or set of managers

Default Width: Narrow

Enabled: ☒ Yes ☐ NoIn use by 1 user(s), 0 module(s), and 0 hyperlink(s).

View UsageCopy

DisplayPreference FieldsPortlet CommunicationAccessUser Help

Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

☐ User Sortable

Columns Displayed by Default:

Name	RESOURCE_FULL_NAME	Tooltip: RESOURCE_INFO
Period Type	PERIOD_TYPE_NAME	Tooltip: PERIOD_TYPE_NAME
Current Period (hrs)	ACTUALS_CURRENT	
Unsubmitted Time (hrs)	UNRELEASED_TIME	
Previous Period (hrs)	ACTUALS_PREVIOUS	

Columns Displayed by Default in Maximized View Only:

Columns Available for Display:

Arrange Data

Default Sort By: ☒ Ascending☐ Descending

\*Default Rows Displayed: 5In Normal View50In Maximized View

PreviewSaveDoneCancel

4. For non-Java portlets:

- a. (Optional) At any time, you can click **Save** to commit your changes.
- b. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 55](#).
- c. (Optional) Click the link associated with **Data Source** to view the details of the data source in the PPM Workbench.
- d. (Optional) Click the appropriate tab to make changes to the other settings. The content of the tabs varies based on the portlet type. Field descriptions are provided in [Chapter 3, \*Creating New Portlet Definitions\*, on page 53](#).

For Display tab content, refer to the following sections based on the portlet type:

- For list portlets, see [List Portlet on page 98](#).
- For bar charts, see [Bar Chart Portlet on page 113](#).
- For clustered bar charts, see [Clustered Bar Chart Portlet on page 115](#).
- For stacked bar charts, see [Stacked Bar Chart Portlet on page 118](#).
- For pie charts, see [Pie Chart Portlet on page 120](#).
- For line charts, see [Line Chart Portlet on page 122](#).
- For bubble charts, see [Bubble Chart Portlet on page 129](#).

5. For Java portlets:

- a. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 55](#).
- b. (Optional) Configure portlet communication subscribers using the details provided in [step 9 on page 60](#).
- c. (Optional) Configure the user and administrator access using the details provided in [step 10 on page 61](#).

6. Click **Done**.



Click **Preview** to review the layout and make sure that you have presented the information as desired.

## Deleting Portlet Definitions

To delete a portlet definition:

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

The Configure Portlet Definitions page appears, as shown in [step 2 on page 50](#).

3. Search for and select a portlet definition.

For detailed instructions on how to search for and select portlet definitions, see [Searching for Existing Portlet Definitions on page 50](#).

The Configure Portlet Definition: *<Portlet Definition>* page appears.

4. Click the delete icon next to the name of the portlet definition to delete.

A confirmation dialog box opens.

5. Click **Delete**.

The confirmation dialog box closes and the Configure Portlet Definitions page is updated.

# Importing Java Portlet Definitions

The WAR files used for Java portlet definitions must be placed on the server file system in the `<PPM_Home>/server/<PPM_ServerName>/deploy` directory.

To import a Java portlet definition using the Import Portlet Definition wizard:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Portlet Definitions > Import a Portlet Definition**.

The Choose Portlet Type step of the Import Portlet Definition page appears.

The screenshot shows the 'Import Portlet Definition' wizard interface. At the top, the title 'Import Portlet Definition' is displayed. Below it, a progress bar indicates the current step: '1. Choose Portlet Type' is selected, followed by '2. Select from Available Portlets', '3. Enter Portlet Information', '4. Configure Portlet Communication', and '5. Configure Access'. Below the progress bar, there are two radio button options: 'Java Portlet - Created according to the Java Portlet specification' (which is selected) and 'WSRP Portlet - Created according to WSRP specifications'. At the bottom of the wizard, there are three buttons: 'Cancel', 'Back', and 'Next'.

3. Select **Java Portlet - Created according to the Java Portlet specification**.

#### 4. Click **Next**.

The Select from Available Portlets step of the Import Portlet Definition page appears.

**Import Portlet Definition (Java)**

1. Choose Portlet Type ▶ 2. **Select from Available Portlets** ▶ 3. Enter Portlet Information

4. Configure Portlet Communication ▶ 5. Configure Access

---

**Select from Available Portlets**

The Dashboard has found the Java portlets listed below. Please select one of these portlets to import.

	Portlet Display Name	Description
<input checked="" type="checkbox"/>	Project List	Displays general information about ITG Projects, such as how close they are to completion and their scheduled finish date.
<input checked="" type="checkbox"/>	Summary Task List	Displays general information about Summary Tasks, such as how close they are to completion and their scheduled finish date.
<input checked="" type="checkbox"/>	Package List	Displays general information about ITG Packages, such as their description and status.
<input checked="" type="checkbox"/>	Request Activity	Displays general activity information about ITGRequests, such as the number of Requests opened and closed during the last two weeks, and the number of open Requests.
<input checked="" type="checkbox"/>	Package Activity	Displays activity information about the number of deployments (Package Line execution step transactions) completed during the last three weeks. Provides drill down to any Object Type or Environment to view the included Packages.
<input checked="" type="checkbox"/>	Request Summary	Displays information about groups of ITGRequests, such as their priority, type, status and the total number of Requests for each category. Additionally provides drill down capabilities to detailed requests.
<input checked="" type="checkbox"/>	Open Requests by Priority	A bar chart that displays the number of Requests currently open, grouped by priority.
<input checked="" type="checkbox"/>	Request List	Displays general information about ITG Requests, such as their description and status.
<input checked="" type="checkbox"/>	Project Gantt	Displays Projects, Tasks and Milestones in Gantt chart format. This portlet can be configured based on such criteria as Project and Task status, schedule and resource assignments. It also allows drilling down into Project and Task details.
<input checked="" type="checkbox"/>	Capitalized Project Timelines	A graphical display of projects with capitalized costs showing their start date, end date and health.
<input checked="" type="checkbox"/>	Project Timelines	Displays project level information in a gantt format for multiple projects, based on the planned start and finish periods.
<input type="radio"/>	RSS Portlet	RSS Reader Portlet
<input type="radio"/>	URL Portlet	URL Portlet
<input checked="" type="checkbox"/>	Previously imported	

#### 5. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definitions are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.

6. Click **Next**.

The Enter Portlet Information step of the Import Portlet Definition page appears.

The screenshot shows the 'Enter Portlet Information' step of the 'Import Portlet Definition (Java)' wizard. The progress bar at the top indicates the current step is '3. Enter Portlet Information', with previous steps '1. Choose Portlet Type' and '2. Select from Available Portlets' completed, and subsequent steps '4. Configure Portlet Communication' and '5. Configure Access' pending. The main form area is titled 'Portlet Information' and contains the following fields: 'Name' (text input with 'URL Portlet'), 'Category' (text input with a 'Manage Categories' button), 'Description' (text input with 'URL Portlet'), 'Default Width' (dropdown menu set to 'Narrow'), and 'Enabled' (radio buttons for 'Yes' and 'No', with 'Yes' selected). At the bottom, there are navigation buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

7. (Optional) Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 55](#).

8. Click **Next**.

The Configure Portlet Communication step of the Import Portlet Definition page appears.

The screenshot shows the 'Configure Portlet Communication' step of the 'Import Portlet Definition (Java)' wizard. The progress bar at the top indicates the current step is '4. Configure Portlet Communication', with previous steps '1. Choose Portlet Type', '2. Select from Available Portlets', and '3. Enter Portlet Information' completed, and subsequent steps '5. Configure Access' pending. The main form area is titled 'Portlet Communication Subscribers' and contains the following elements: a text area for defining whether the portlet definition enables portlet communication, a checkbox labeled 'Enable portlet communication (user can choose to disable it)', and an 'Event topic' field (text input with a 'Manage event topics' button). At the bottom, there are navigation buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

- If portlet communication is enabled, you must provide an event topic.

Use the auto-complete button to provide an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

9. Click **Next**.

The Configure Access step of the Import Portlet Definition page appears.

Import Portlet Definition (Java)

1. Choose Portlet Type ▶ 2. Select from Available Portlets ▶ 3. Enter Portlet Information  
4. Configure Portlet Communication ▶ 5. Configure Access

### Configure Access

#### User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

Security Type	Name
All Users	

Give Access to: User

#### Administrator Access

Users specified below will have access to modify this Portlet Definition.

Security Type	Name
All Portlet Definition Administrators	

Give Access to: User

#### WSRP Access

☐ Make Portlet available to WSRP Consumers

Cancel Back Next Finish

- (Optional) Configure the user and administrator access using the details provided in [step 10 on page 61](#).

10. Click **Finish**.

The confirmation page appears.

Import Portlet Definition

Package List (Copy) has been successfully imported.

[Configure Package List \(Copy\)](#)  
[Import another Portlet Definition](#)  
[Create new Portlet Definition](#)  
[Search for other Portlet Definitions to configure](#)

11. Review the Import Portlet Definition page and verify that the import was successful.

12. (Optional) Select the link of your choice.



# Importing WSRP Portlet Definitions

To import a WSRP portlet definition using the Import Portlet Definition wizard:

1. Make sure that the producer Web URL is available.
2. Log on to PPM Center.
3. From the menu bar, select **Open > Administration > Portlet Definitions > Import a Portlet Definition**.

The Choose Portlet Type step of the Import Portlet Definition page appears.

The screenshot shows the 'Import Portlet Definition' wizard. At the top, a progress bar indicates five steps: 1. Choose Portlet Type (active), 2. Select from Available Portlets, 3. Enter Portlet Information, 4. Configure Portlet Communication, and 5. Configure Access. Below the progress bar, there are two radio button options: 'Java Portlet - Created according to the Java Portlet specification' and 'WSRP Portlet - Created according to WSRP specifications'. The 'WSRP Portlet' option is selected. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

4. Select **WSRP Portlet - Created according to WSRP specifications**.
5. Click **Next**.

The Define Producer Web Service step of the Import Portlet definition page appears.

The screenshot shows the 'Import Portlet Definition (WSRP)' wizard. At the top, a progress bar indicates six steps: 1. Choose Portlet Type, 2. Define Producer Web Service (active), 3. Select from Available Portlets, 4. Enter Portlet Information, 5. Configure Portlet Communication, and 6. Configure Access. Below the progress bar, the section is titled 'Define Producer Web Service'. It contains a text area with instructions: 'In this step you can either: select a predefined producer (new producers can be defined using the Manage WSRP Producer button) or type a free URL of a WSRP producer. When you click Next, the Dashboard will contact the web service to determine what portlets are available. You will then be able to choose one of the portlets that it offers.' There are two radio button options: 'Predefined Producer URL' (selected) and 'Producer URL'. The 'Predefined Producer URL' option has a text input field and a 'Manage WSRP Producers' button. The 'Producer URL' option has a text input field. Below the input fields, there is an example URL: 'Example: http://www.myserver.com/dashboard/wsrp4producer.wsdl'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Next'.

6. Select either a **Predefined Producer URL** (define new producers by clicking the **Manage WSRP Producers** button) or **Producer URL** (provide the URL for the Web service providing portlet definitions using WSRP).



If you are importing a portlet from another PPM Center instance, use the following URL: `http://<Host>:<Port>/dashboard/wsrp4jproducer.wsdl`.

7. Click **Next**.

The Web service is contacted to determine what portlet definitions are available.

The Select from Available Portlets page appears.

**Import Portlet Definition (WSRP)**

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. **Select from Available Portlets** ▶ 4. Enter Portlet Information

5. Configure Portlet Communication ▶ 6. Configure Access

---

**Select from Available Portlets**

The Dashboard has found the portlets listed below from the WSRP producer at `http://labmvtg25:46300/dashboard/wsrp4jproducer.wsdl`. Please select one of these portlets to import.

Portlet Display Name	Description
<input checked="" type="radio"/> My Requests	Displays all Requests created by or assigned to the current user. This portlet provides a critical view into your most pressing Requests and nearing deadlines.
<input type="radio"/> My Tasks	Displays all Project Tasks currently assigned to you that have a scheduled finish date two weeks from the current date.
<input type="radio"/> Project List	Displays general information about PPM Projects, such as how close they are to completion and their scheduled finish date.

8. Select a portlet.

Note that only one portlet can be selected at a time.

If no portlet definitions are available (that is, all of the portlet definition are selected):

- Click **Back** to return to the previous page.
- Click **Cancel** to stop.

9. Click **Next**.

The Enter Portlet Information step of the Import Portlet Definition page appears.

The screenshot shows the 'Enter Portlet Information' step of the 'Import Portlet Definition (WSRP)' wizard. The progress bar at the top indicates the current step is '4. Enter Portlet Information'. The form contains the following fields and controls:

- Name:** A text input field with the value 'Project List'.
- Category:** A dropdown menu with a list icon and a 'Manage Categories' button.
- Description:** A text input field with the value 'Displays general information about PPM Projects, such as how close they are to completion and their schedu'.
- Default Width:** A dropdown menu with the value 'Narrow'.
- Enabled:** Radio buttons for 'Yes' (selected) and 'No'.

At the bottom of the form are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

10. Provide the general information using the details from the **Portlet Information** section of the table included in [step 5 on page 55](#).

11. Click **Next**.

The Configure Portlet Communication step of the Import Portlet Definition page appears.

The screenshot shows the 'Configure Portlet Communication' step of the 'Import Portlet Definition (WSRP)' wizard. The progress bar at the top indicates the current step is '5. Configure Portlet Communication'. The form contains the following fields and controls:

- Portlet Communication Subscribers:** A section header.
- Define whether this portlet definition enables portlet communication. If yes, select event topic names to subscribe portlet definition for published portlet event.** A text label.
- Enable portlet communication (user can choose to disable it):** A checkbox that is currently unchecked.
- \*Event topic:** A text input field with a list icon and a 'Manage event topics' button.

At the bottom of the form are four buttons: 'Cancel', 'Back', 'Next', and 'Finish'.

- If portlet communication is enabled, you must provide an event topic.

Use the auto-complete button to provide an existing event topic or click **Manage event topics** to add a new topic or delete an existing topic.

12. Click **Next**.

The Configure Access step of the Import Portlet Definition page appears.

Import Portlet Definition (WSRP)

1. Choose Portlet Type ▶ 2. Define Producer Web Service ▶ 3. Select from Available Portlets ▶ 4. Enter Portlet Information  
5. Configure Portlet Communication ▶ 6. **Configure Access**

---

**Configure Access**

User Access

Users specified below will have access to add this Portlet to their dashboards.

Require users to have one of these privileges:

Allow access to only the following users and groups:

Security Type	Name
All Users	

Give Access to: User

---

Administrator Access

Users specified below will have access to modify this Portlet Definition.

Security Type	Name
All Portlet Definition Administrators	

Give Access to: User

---

Drilldown Access

☐ This portlet supports drilling into

Cancel Back Next Finish

13. (Optional) Configure the user and administrator access using the details provided in [step 10 on page 61](#).

14. Click **Finish**.

The confirmation page appears.

15. Review the Import Portlet Definition page and verify that the import was successful.

16. (Optional) Select the link of your choice.

# Migrating Portlet Definitions

Use the PPM Portlet Definition Migrator object type to migrate portlet definitions. The following are things to consider when migrating portlet definitions:

- When migrating an HP-supplied portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a standard portlet definition, the portlet's data source file is automatically migrated at the same time as the portlet definition.
- When migrating a Java portlet definition, you must configure the source and destination servers with the same set of Web applications (such as WARs) before migrating the Java portlet definition.
- When migrating a WSRP portlet definition, the migration of the portlet definition is sufficient for the WSRP portlet to work. Migrating a WSRP portlet definition might fail under the following conditions:
  - **If the URL uses a port number.** If you move that portlet to a different machine whose WSRP provider runs on a different port number, the portlet stops working.
  - **If a WSRP portlet definition shares a firewall or a private network with a WSRP producer.** You cannot migrate the portlet definition outside of that private network or firewall protected area (because the machine is not accessible).

# Defining a Drill-down Page

Portlet drill-down is a powerful feature that allows you to access and view the details of the information displayed in a portlet.

When you create a portlet, you can specify one or more drill-to portlets (these are sometimes called drill-down pages). Clicking a portlet that contains a drill-to portlet results in the display of the corresponding portlet. A drill-to portlet typically offers a view of the data with more details or the information is filtered differently.



- Prior to being added to a portlet, these drill-to portlets must already exist on your PPM Center instance.
- Drill-to portlets must be builder portlets (created using the Portlet Definition wizard).
- Only selected HP-supplied portlets can be used as drill-to portlets. These include: Issue List, Program Risk List, Program Scope Change List, and Program Project List.

## Usage Example

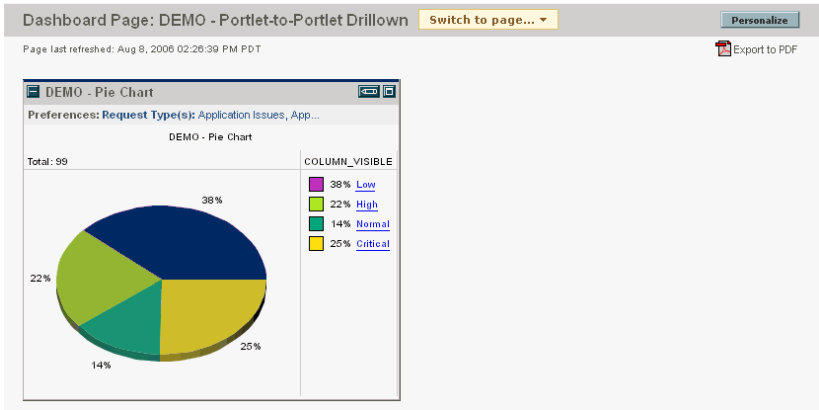
In some cases you may want to view the data in more than one way. Whenever you want to do this, specify one or more drill-to portlets.

For example, suppose you have a portlet that shows a collection of requests. However, you would like to be able to view the breakdown of requests sorted by priority and have insight into some of the requests' details. To provide this information, you would create two drill-to portlets, one showing the requests sorted by priority and the other showing the selected details of the requests. Then you would configure your portlet such that it is linked to these drilldown pages (drill-to portlets).

When you click key areas within the portlet having the drilldown pages, the appropriate data from the drill-to portlets is displayed.

The following figure shows an example of this kind of scenario.

Figure 3-1. Portlet having drilldown pages



If you click either the amber (25%) wedge or the **Critical** link, the drill-to pages having requests with critical priorities are shown (see [Figure 3-2](#)). Note that the drill-to page on the left shows the list of requests having the selected priority, whereas the drill-to page on the right shows the selected details of the request.

Figure 3-2. Drill-to portlets showing critical priority requests

Drill Down From DEMO - Pie Chart    Back    Export to PDF

Priority	Request #	Request #	Request Type	Description	Priority
Critical	30667	30667	Application Issues	Getting stock from front.	Critical
Critical	30649	30649	Application Issues	External Website - Job updates.	Critical
Critical	30641	30641	Application Issues	Replace cartridge in Brother labeler.	Critical
Critical	30622	30622	Application Issues	Tom called about his printer.	Critical
Critical	30612	30612	Application Issues	Research massive port scan/probe on cti.com	Critical

Showing 1 to 5 of 25    Prev    Next

Showing 1 to 5 of 25    Prev    Next

Alternatively, if you click either the red (38%) wedge or the **Low** link, the drill-to pages having requests with low priorities appear (see *Figure 3-3*).

Figure 3-3. Drill-to portlets showing low priority requests

Drill Down From DEMO - Pie Chart Back Export to PDF

Priority	Request #	Request #	Request Type	Description	Priority
Low	30672	30672	Application Issues	Make space on full volume on Pearl	Low
Low	30654	30654	Application Issues	Corporate Affiliate	Low
Low	30644	30644	Application Issues	Morning mail and phone support.	Low
Low	30636	30636	Application Issues	Move briefing.	Low
Low	30617	30617	Application Issues	Morning mail / phone msg support.	Low

Showing 1 to 5 of 38 Prev Next

## Defining a Drill-down Page

The following procedure describes how to define a drilldown page. These instructions are applicable to the third step of the Portlet Definition wizard.



The page from which the drill-to portlets are accessed is sometimes referred to as the drill-from page.

To define a drill-down page for a column:

1. On the Set up Display Options of the Create Portlet Definition (<Portlet Type>) page, select **Drilldown to Portlet**.

Create Portlet Definition (Pie Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

☐ No Hyperlink

☐ Hyperlink Source:

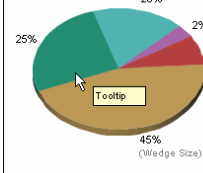
☒ Drilldown to Portlet: (None) Edit

☐ Portlet Event:

Sample Pie Chart

Chart Title

Total: N (Wedge Source Value Total)



Wedge Label

20% Wedge A

25% Wedge B

45% Wedge C

8% Wedge D

2% Wedge E

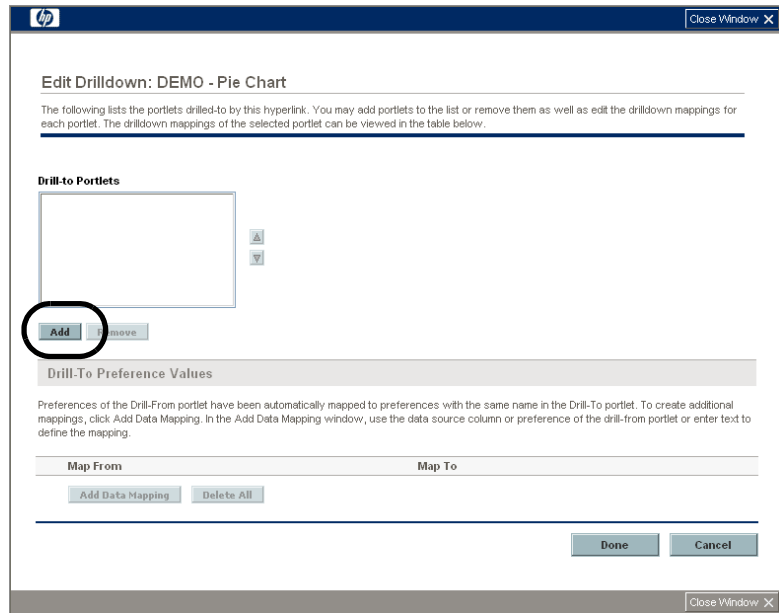
45% (Wedge Size)

Cancel Back Next



2. Click **Edit**.

The Edit Drilldown: <Name> dialog box appears.



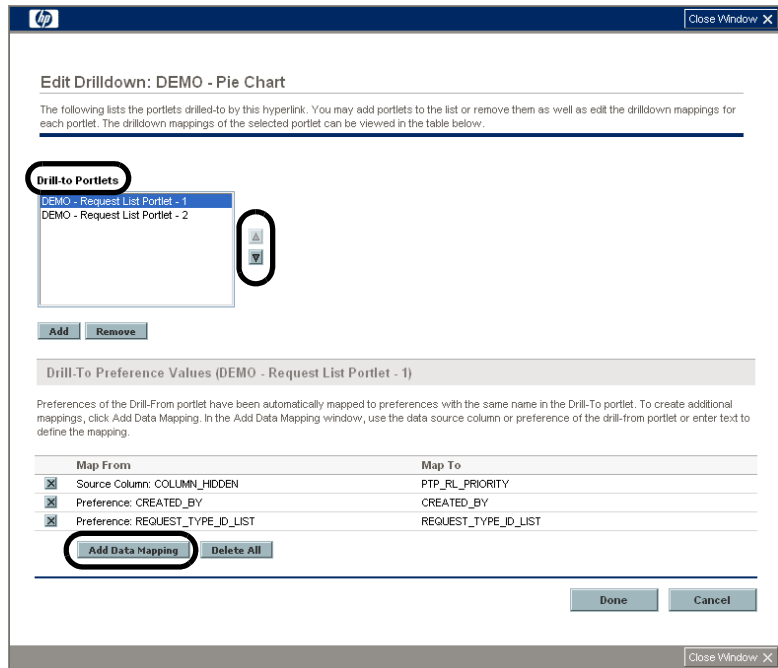
3. Click **Add**.

The list of available portlet definitions appears.

4. Select one or more portlet definitions from the list presented.

5. Click **OK**.

The portlet definition are added to the **Drill-to Portlets** list and the list of available portlet definitions disappears.



Use the up- and down-pointers to rearrange the order of the drill-to portlets.

When displayed, the drill-to portlets appear in the order your selected, in a top to bottom fashion. Narrow portlets will not be displayed side by side.

6. (Optional) To change the default mapping between the current portlet definition and the drill-to portlet definition:

- a. Select a portlet definition from the **Drill-to Portlets** list.
- b. Click **Add Data Mapping**.

The Add Data Mapping dialog box appears.

- c. Provide the mapping details using the information from the following table.



The examples shown in [Usage Samples on page 84](#) include annotations that identify the data mappings used in the example.

Field Name (*Required)	Description
*Map Value From	<p>Indicate the data to use. Choices include:</p> <ul style="list-style-type: none"> <li>• <b>Data Source Column.</b> Select a column. Choices are limited to the columns available in your data source.</li> <li>• <b>Preference of Drill-From Portlet.</b> Select the desired preference for the portlet.</li> <li>• <b>Text.</b> Provide an alphanumeric string up to 200 characters in length.</li> </ul>
*Map Value To	<p>Select the desired preference from the drill-to portlet. Choices are limited to the preference fields in the drill-to portlet.</p>

d. Click **Add**.

The information is added to the Edit Drilldown: <Name> dialog box and the Add Data Mapping dialog box disappears.

7. (Optional) To delete a mapping between the current portlet definition and the drill-to portlet definition:

- a. Select a portlet definition from the **Drill-to Portlets** list.
- b. In the **Drill-To Preference Values (<Drill-to Portlet>)** section, select from the following techniques:
  - Click the **Delete** icon next to the unwanted mapping
  - Click **Delete All** to remove all the mappings at one time



Occasionally it is easier to delete the existing mappings, then remap the current portlet and drill-to portlet definitions.

8. Once the drilldown is correctly defined, click **Done**.

The Edit Drilldown: <Name> dialog box disappears.

Continue with the configuration (and sharing) of your portlet as you normally would.

## Usage Samples

The following images provide details about the data source and portlet configuration used to create the portlets used in the examples shown in this document.



The annotations identify each of the three data mappings.

## DEMO - Pie Chart Portlet

This is the drill-from portlet and its various components.

**Create Portlet Definition (Pie Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

☐ No Hyperlink

☐ Hyperlink Source:

☒ Drilldown to Portlet: (None)

☐ Portlet Event:

**Sample Pie Chart**

**Chart Title**

Total: N (Wedge Source Value Total)

**Wedge Label**

20%	Wedge A
25%	Wedge B
45%	Wedge C
8%	Wedge D
2%	Wedge E

20%

25%

45%

8%

2%

Tooltip

(Wedge Size)

Data Source

Data Source : DEMO - Pie Chart

Data Source Name: DEMO - Pie Chart Time-out Use Default 20 Seconds

Reference Code: DEMO\_PIE\_CHART

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership 1

Full Query for the Data Source

```
SELECT PRIORITY_MEANING COLUMN_VISIBLE PRIORITY_CODE COLUMN_HIDDEN COUNT(*) VALUE,
length(priority_code)||'||length(priority_meaning)||' length(priority_meaning) PRIORITY_MEANING PRIORITY_CODE
length(priority_code)||'||length(priority_meaning)||' length(priority_meaning) PRIORITY_MEANING PRIORITY_CODE
FROM KORT_REQUESTS_V
WHERE f=1
AND batch_number 1
group by priority_code, priority_meaning
```

Edit Query Use Bind Variables? ☐ Yes ☒ No

Verify OK Save Cancel

Ready

Data Source : DEMO - Pie Chart

Data Source Name: DEMO - Pie Chart Time-out Use Default 20 Seconds

Reference Code: DEMO\_PIE\_CHART

Description:

Enabled: ☒ Yes ☐ No

Data Source | Filter Fields | Portlet Definitions | Ownership

Seq	Name	Token	Validation	Required	Enabled
1	Created By:	CREATED_BY	SPM - User Names - Enabled	N	Y
2	Request Type(s)	REQUEST_TYPE_ID_LIST	CRT - Request Types - Enabled	N	Y

New Edit Remove

Verify OK Save Cancel

Ready

Configure Portlet Definition: DEMO - Pie Chart

Preview

Save

Done

Cancel

Portlet Type:

Pie Chart

Data Source:

My Packages

Created By:

Admin User

Last Modified By:

Admin User

Last Modification Date:

2/22/2008

Name:

DEMO - Pie Chart

Category:

Manage Categories

Description:

Default Width:

Narrow

Enabled:

☒ Yes ☐ No

Not in use.

Copy

Delete

Display

Preference Fields

Portlet Communication

Access

User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title:

Wedge Source:

ASSIGNED\_TO

Wedge Size Source:

ASSIGNED\_TO

Wedge Label:

ASSIGNED\_TO

Color Source:

Tooltip Source:

Hyperlink Options:

☐ No Hyperlink

☐ Hyperlink Source: ASSIGNED\_TO

☒ Drilldown to Portlet: Resource Assignments

☐ Portlet Event:

Edit

Sample Pie Chart

Chart Title

Total: N (Wedge Source Value Total)

Wedge Label

20% 20% Wedge A

25% 25% Wedge B

45% 45% Wedge C

8% 8% Wedge D

2% 2% Wedge E

20%

25%

45%

8%

2%

45% (Wedge Size)

Tooltip

Preview

Save

Done

Cancel

Close Window X

### Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

---

**Drill-to Portlets**

DEMO - Request List Portlet - 1  
DEMO - Request List Portlet - 2

Add Remove

**Drill-To Preference Values (DEMO - Request List Portlet - 1)**

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

Map From	Map To
<input checked="" type="checkbox"/> Source Column: COLUMN_HIDDEN	PTP_RL_PRIORITY
<input checked="" type="checkbox"/> Preference: CREATED_BY	CREATED_BY
<input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST	REQUEST_TYPE_ID_LIST

Add Data Mapping Delete All

Done Cancel

Close Window X

Close Window X

### Edit Drilldown: DEMO - Pie Chart

The following lists the portlets drilled-to by this hyperlink. You may add portlets to the list or remove them as well as edit the drilldown mappings for each portlet. The drilldown mappings of the selected portlet can be viewed in the table below.

---

**Drill-to Portlets**

DEMO - Request List Portlet - 1  
DEMO - Request List Portlet - 2

Add Remove

**Drill-To Preference Values (DEMO - Request List Portlet - 2)**

Preferences of the Drill-From portlet have been automatically mapped to preferences with the same name in the Drill-To portlet. To create additional mappings, click Add Data Mapping. In the Add Data Mapping window, use the data source column or preference of the drill-from portlet or enter text to define the mapping.

Map From	Map To
<input checked="" type="checkbox"/> Source Column: COLUMN_HIDDEN	PTP_RL_PRIORITY
<input checked="" type="checkbox"/> Preference: REQUEST_TYPE_ID_LIST	REQUEST_TYPE_ID_LIST
<input checked="" type="checkbox"/> Preference: CREATED_BY	CREATED_BY

Add Data Mapping Delete All

Done Cancel

Close Window X

# DEMO - Request List Portlet - 1

This is one of the drill-to portlets and its various components.

Preferences:			
Request # Δ	Request Type	Description	Priority
30145	Enhancement Request	Update New Employee Health Care Assignment	Low
30167	Telco Generic	are there required fields?	Low
30210	Gap	Software doesn't support multi-currency	High
30301	System Change Request	New Period Close Reporting for Finance	Normal
30303	System Change Request	Need daily MRP run to start at 23:00 instead of 22:00 to accomodate for longer run times.	Low
Showing 1 to 5 of 200 <a href="#">Prev</a> <a href="#">Next</a> <a href="#">Maximize</a>			

## Data Source

Data Source : DEMO - Request List Portlet - 1

Data Source Name: DEMO - Request List Portlet - 1

Time-out: Use Default 20 Seconds

Reference Code: DEMO\_\_REQUEST\_LIST\_PORTLET\_\_1

Description:

Enabled: ☒ Yes ☐ No

Data Source

Filter Fields

Portlet Definitions

Ownership

Full Query for the Data Source

SELECT PRIORITY\_MEANING MY\_PRIORITY, request\_id MY\_REQUEST\_NO  
FROM KCRT\_REQUESTS\_V  
WHERE 1=1  
AND batch\_number = 1

Edit Query

Use Bind Variables?  
☐ Yes ☒ No

Verify

OK Save Cancel

\*Save\*Successful.



hp Data Source : DEMO - Request List Portlet - 1

Data Source Name: DEMO - Request List Portlet - 1 Time-out Use Default 20 Seconds

Reference Code: DEMO\_REQUEST\_LIST\_PORTLET\_1

Description:

Enabled: ☒ Yes ☐ No

Data Source Filter Fields Portlet Definitions Ownership

Seq	Name	Token	Validation	Required	Enabled
1	Created By	CREATED_BY	IPM - User Names - Enabled	N	Y
2	Request Type(s)	REQUEST_TYPE_ID_LIST	RT - Request Types - Enabled	N	Y
3	Priority	PTP_RL_PRIORITY	DEM Filter - Priority - Enabled (with blank)	N	Y

1 2 3

↑ ↓ New Edit Remove

Verify OK Save Cancel

\*Save Successful.

Configure Portlet Definition: DEMO - Request List Portlet - 1

Preview

Save

Done

Cancel

Portlet Type:

List

Data Source:

DEMO - Request List Portlet - 1

Created By:

Last Modified By:

Last Modification Date:

Aug 3, 2006

Name:

DEMO - Request List Portlet - 1

Category:

Manage Categories

Description:

Default Width:

Wide

Enabled:

☒ Yes ☐ No

In use by 0 user(s), 0 module(s), and 1 hyperlink(s).

View Usage

Copy

Delete

Display

Preference Fields

Access

User Help

Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

Add Column

Edit

Delete

Click on a column to select

☐ User Sortable

Columns Displayed by Default:

▲

▼

Priority	▲	My Priority	
Request #		My Request No	

Columns Displayed by Default in Maximized View Only:

▲

▼

Columns Available for Display:

Arrange Data

Default Sort By:

Priority

☒ Ascending ☐ Descending

Default Rows Displayed:

5

In Normal View

50

In Maximized View

Preview

Save

Done

Cancel

## DEMO - Request List Portlet - 2

This is the other drill-to portlet and its various components.

Preferences:			
Request # Δ	Request Type	Description	Priority
30145	Enhancement Request	Update New Employee Health Care Assignment	Low
30167	Telco Generic	are there required fields?	Low
30210	Gap	Software doesn't support multi-currency	High
30301	System Change Request	New Period Close Reporting for Finance	Normal
30303	System Change Request	Need daily MRP run to start at 23:00 instead of 22:00 to accomodate for longer run times.	Low
Showing 1 to 5 of 200 <a href="#">Prev</a> <a href="#">Next</a> <a href="#">Maximize</a>			

### Data Source

Data Source : DEMO - Request List Portlet - 2

Data Source Name: DEMO - Request List Portlet - 2

Time-out: Use Default 20 Seconds

Reference Code: DEMO\_\_REQUEST\_LIST\_PORTLET\_\_2

Description:

Enabled: ☒ Yes ☐ No

Data Source

Filter Fields

Portlet Definitions

Ownership

Full Query for the Data Source

SELECT PRIORITY\_MEANING MY\_PRIORITY, request\_id MY\_REQUEST\_NO, DESCRIPTION MY\_DESCRIPTION, REQUEST\_TYPE\_NAME MY\_REQUEST\_TYPE\_NAME FROM KCRT\_REQUESTS\_V WHERE 1=1 AND batch\_number = 1


Edit Query

Use Bind Variables? ☐ Yes ☒ No

Verify

OK Save Cancel

\*Save\*Successful.

 Data Source : DEMO - Request List Portlet - 2

Data Source Name: DEMO - Request List Portlet - 2    Time-out: Use Default    20    Seconds

Reference Code: DEMO\_REQUEST\_LIST\_PORTLET\_\_2

Description:

Enabled: ☒ Yes    ☐ No

Seq	Name	Filter Fields	Portlet Definitions	Ownership	Validation	Required	Enabled
1	Created By	CREATED_BY			PPM - User Names - Enabled	N	Y
2	Request Type(s)	REQUEST_TYPE_ID_LIST			CRT - Request Types - Enabled	N	Y
3	Priority	PRT_PRL_PRIORITY			DEM Filter - Priority - Enabled (with blank)	N	Y

Up Down    New    Edit    Remove

Verify    OK    Save    Cancel

Ready

## Portlet Definition

### Configure Portlet Definition: DEMO - Request List Portlet - 2

[Preview](#)[Save](#)[Done](#)[Cancel](#)**Portlet Type:** List **Data Source:** [DEMO - Request List Portlet - 2](#)**Created By:****Last Modified By:****Last Modification Date:** Aug 3, 2006**Name:** **Category:**[Manage Categories](#)**Description:****Default Width:** Wide **Enabled:** ☒ Yes ☐ No In use by 0 user(s), 0 module(s), and 1 hyperlink(s).[View Usage](#)[Copy](#)[Delete](#)[Display](#)[Preference Fields](#)[Access](#)[User Help](#)

#### Display Columns

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

[Add Column](#)[Edit](#)[Delete](#)

Click on a column to select



User Sortable

#### Columns Displayed by Default:

	<b>Request #</b>		My Request No	
	<b>Request Type</b>		My Request Type Name	
	<b>Description</b>		My Description	
	<b>Priority</b>		My Priority	

#### Columns Displayed by Default in Maximized View Only:



#### Columns Available for Display:

##### Arrange Data

**Default Sort By:**☒ Ascending☐ Descending**Default Rows Displayed:**

In Normal View

In Maximized View

[Preview](#)[Save](#)[Done](#)[Cancel](#)

# Defining a Portlet Event

The following procedure describes how to define a portlet event. These instructions are applicable to the third step of the Portlet Definition wizard.

To define a portlet event for a column:

1. On the Set up Display Options step of the Create Portlet Definition (<Portlet Type>) page, from the Hyperlink Options section, select **Portlet Event**.
2. Click **Edit**.

The Edit Portlet Event Properties dialog box appears.

**Edit Portlet Event Properties**

You can edit portlet event data that will be published for the chosen event topic by this hyperlink. Each event data has key-value property set.

\*Event topic:  Manage event topics

**Event Properties**

To create additional event property click Add Event Property. In the Add Event Property window for property key enter the text or use preference of selected portlet definition. Use the data source column or preference of source portlet or enter text to define the property value.

Property Key	Property Value
--------------	----------------

Add Event Property Delete All

Done Cancel

3. Provide an event topic. Use the auto-complete button to provide an existing event topic or click Manage event topics to add a new topic or delete an existing topic.

4. Click **Add Event Property**.

The Add Event Property dialog box appears.

5. Provide the event property details using the information from the following table.

Field Name (*Required)	Description
*Property Key	Select the desired preference from the portlet definition. Choices are limited to the preference fields in the portlet definition. Or, provide an alphanumeric string up to 200 characters in length.
*Property Value	Indicate the data to use. Choices include: <ul style="list-style-type: none"><li>• <b>Data Source Column.</b> Select a column. Choices are limited to the columns available in your data source.</li><li>• <b>Portlet source preference.</b> Select the desired preference for the portlet.</li><li>• <b>Text.</b> Provide an alphanumeric string up to 200 characters in length.</li></ul>

6. Click **Add**.

The information is added to the Edit Portlet Event Properties dialog box and the Add Event Property dialog box disappears.

7. (Optional) To delete an event property:

- Click the **Delete** icon next to the unwanted event property.
- Click **Delete All** to remove all the event properties at one time.

8. Once the event properties are correctly defined, click **Done**.

The Edit Portlet Event Properties dialog box disappears.

Continue with the configuration (and sharing) of your portlet as you normally would.

## Managing Portlet Categories

Managing categories is an optional step when creating or maintaining portlet definitions.

Portlet categories define an entity, such as a request or a task. Portlet categories can also define functional groups, such as Development or Test. Adding one or more categories to a portlet can make a portlet easier to find.

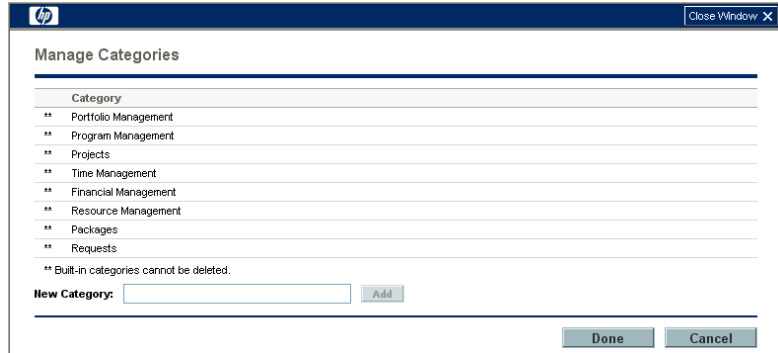
### Adding Portlet Categories

To add a portlet category:

1. Click **Manage Categories**, on either the:
  - Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page
  - Configure Portlet Definition: <Portlet Definition> page



The Manage Categories dialog box appears.



2. Type a new category name in the **New Category** field.

3. Click **Add**.

The new category is added to the list.

4. Click **Done**.

The Manage Categories dialog box is closed.

## Deleting Portlet Categories

To delete a portlet category:



HP-supplied portlet categories cannot be deleted. Also, you cannot delete a portlet category containing one or more portlet definition, and any such categories do not include a **Delete** icon.

1. Click **Manage Categories**, on either the:

- Enter Portlet Information step of the Create Portlet Definition (<Portlet Type>) page
- Configure Portlet Definition: <Portlet Definition> page

The Manage Categories dialog box appears.

2. Click the **Delete** icon next to the portlet category.

The portlet category is deleted.

### 3. Click **Done**.

The Manage Categories dialog box is closed.

## Supplemental Details for the Set Up Display Option Step

This section provides relevant details for the Set up Display options for the various portlet types. This information is used in [step 7 on page 56](#).

### List Portlet

Figure 3-4. Set up Display Options for list portlets

**Create Portlet Definition (List)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Display Columns**

Columns may be displayed in the portlet by Default (in the user's initial view) or in the Maximized view only. Columns may be made optionally available for the user's selection.

**Add Column** **Edit** **Delete**

Click on a column to select ☐ User Sortable

---

**Columns Displayed by Default:**

▲ Tasks ▲ OPEN\_TASKS ▼

---

**Columns Displayed by Default in Maximized View Only:**

▲ ▼

---

**Columns Available for Display:**

**Arrange Data**

Default Sort By:  ▼ ☒ Ascending ☐ Descending

\*Default Rows Displayed:  In Normal View  In Maximized View

---

**Cancel** **Back** **Next**

Table 3-1. Set up Display Options field descriptions for list portlets (page 1 of 2)

Field Name (*Required)	Description
<b>Display Columns section</b>	
Add Column	Click to add a new column. See <a href="#">Adding Columns</a> for details.
Edit	Select a column, then click to make changes to that column. See <a href="#">Editing Columns on page 106</a> for details.
Delete	Select a column, then click to remove that column. See <a href="#">Deleting Columns on page 107</a> for details.
Columns Displayed by Default	Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it. Choices include the columns whose <b>Display</b> value is set to either <b>By Default - Shown in user's initial view</b> or <b>Always - Cannot be removed by user</b> .
Columns Displayed by Default in Maximized View Only	Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it. Choices include the columns whose <b>Display</b> value is set to <b>In Maximized View Only - Shown by default in Maximized View</b> .
Columns Available for Display	Use the up- and down-pointers to rearrange the order of the columns. Double-click on a column to edit it. Choices include the columns whose <b>Display</b> value is set to <b>Optional - Available for display by user</b> .
<b>Arrange Data section</b>	
Default Sort By	Select the default column used to sort the data. Choices include the columns whose <b>User Sortable</b> value is set to <b>Yes</b> .

Table 3-1. Set up Display Options field descriptions for list portlets (page 2 of 2)

Field Name (*Required)	Description
Ascending/Descending	Indicate whether to sort the data in <b>Ascending</b> and <b>Descending</b> order.
*Default Rows Displayed in Normal View	Specify the default number of records displayed in a normal view portlet. Type any integer greater than zero.
*Default Rows Displayed in Maximized View	Specify the default number of records displayed in a maximized portlet. Type any integer greater than zero.

### Adding Columns

To add a new column to a list portlet:

1. Click **Add Column**.

The Add Display Column dialog box opens.

Add Display Column

\*Column Title:

\*Column Type:

Text

\*Column Value:

☒ Visible Text Source:

EFFORT\_HOVER

☐ Calculated:

no value

Edit

☐ Source contains HTML

Column Width:

Small

Truncate after:

Characters

☐ Show Full Text in Tooltip

Tooltip Value:

☒ Tooltip Source:

☐ Calculated:

no value

Edit

☐ Source contains HTML

User Sortable:

☒ Yes

☐ No

Display:

☐ Optional - Available for display by user

☒ By Default - Shown in user's initial view

☐ In Maximized View Only - Shown by default in Maximized View

☐ Always - Cannot be removed by user

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source:

EFFORT\_HOVER

☐ Drilldown to Portlet:

(None)

Edit

☐ Portlet Event:

Edit

Done

Cancel

2. Provide the column details using the information from the following table.



Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of the following table.

Field Name (*Required)	Description
<b>All Column Types</b>	
*Column Title	<p>Specify the column title to be displayed in the portlet.</p> <p>Type any alphanumeric string (up to 200 characters in length).</p>
*Column Type	<p>Select the column type.</p> <p>Choices include:</p> <ul style="list-style-type: none"><li>• Text</li><li>• Text with Icon</li><li>• Icon</li><li>• Progress Bar</li></ul>
Tooltip Value	<p>Specify the content that appears when a user's cursor hovers over an item. If the content contains HTML, select the <b>Source contains HTML</b> checkbox.</p> <ul style="list-style-type: none"><li>• <b>Tooltip Source.</b> Select the data column that contains the information to display in the tooltip. Choices are limited to those columns in the data source that are configured for this portlet definition on your PPM Center instance.</li><li>• <b>Calculated.</b> Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL).</li><li>• <b>Source contains HTML.</b> Select to enable HTML support for <b>Tooltip Value</b>.</li></ul>
User Sortable	<p>Indicate whether or not the current column can be used for sorting purposes.</p>

Field Name (*Required)	Description
Display	<p>Select how the column should be displayed. Choices include:</p> <ul style="list-style-type: none"> <li>• <b>Optional.</b> Make the column available to the user in the portlet's edit page (Available Column).</li> <li>• <b>By Default.</b> Make the column visible in the portlet (Displayed Column).</li> <li>• <b>In Maximized View Only.</b> Make the column visible in the portlet's Maximized View only (Additional Columns Displayed in Maximized View).</li> <li>• <b>Always.</b> Make the column visible in the portlet (Displayed Column with asterisk).</li> </ul>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

Field Name (*Required)	Description
<b>Column Type: Text and Text with Icon</b>	
*Column Value	<p>Specify the content to display in the portlet. If the content contains HTML, select the <b>Source contains HTML</b> checkbox.</p> <ul style="list-style-type: none"> <li>• <b>Visible Text Source.</b> The content displayed is the value from the data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance.</li> <li>• <b>Calculated.</b> Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL).</li> <li>• <b>Source contains HTML.</b> Select to enable HTML support for <b>Column Value</b>.</li> </ul>
Column Width	<p>Select the width of the column relative to the other columns.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• Small</li> <li>• Medium</li> <li>• Large</li> </ul>
Truncate after <X> Characters	<p>When the <b>Source contains HTML</b> checkbox for <b>Column Value</b> is selected, specify the number of characters to show in the column.</p> <p>Type any integer greater than zero.</p>
Show Full Text in Tooltip	<p>When a value is supplied for <b>Truncate after &lt;X&gt; Characters</b>, select to show the full text in the tooltip.</p>

Field Name (*Required)	Description
<b>Column Type: Icon or Text with Icon</b>	
*Column Value	<p>Select the icon to display in the portlet.</p> <ul style="list-style-type: none"> <li>• <b>Icon Source.</b> The icon displayed is the value from the data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance or a column predefined with icon URLs.</li> <li>• <b>Calculated.</b> Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL).</li> </ul>
<b>Column Type: Progress Bar</b>	
*Column Value	<p>Select the percentage data to display in the portlet.</p> <ul style="list-style-type: none"> <li>• <b>Percentage Source.</b> The percentage displayed is the value from the data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance or a column predefined with percentage information.</li> <li>• <b>Calculated.</b> Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL).</li> </ul>
Color Value	<p>Select a color map to use.</p> <ul style="list-style-type: none"> <li>• <b>Color Source.</b> Select the color map's data column. Select from those columns in the data source that are configured for this portlet definition on your PPM Center instance.</li> <li>• <b>Calculated.</b> Specify the content to display using Javascript to calculate the desired value (if a data column does not return the desired value or the desired value cannot be calculated using SQL).</li> </ul> <p>See <a href="#">Selecting Portlet Colors</a> on page 131 for details.</p>



The following are examples of **Calculated** values.

If you want the content to display a percentage as a whole number but the data column returns a decimal number, specify the following in the dialog to calculate the percentage:

```
var return_value=<DATA_COLUMN>*100;
```

If you want to calculate a project's status based on the number of unassigned tasks, specify the following in the dialog to calculate status values. This example is for Column Type **Icon** or **Text with Icon** and sets the icon status to green if there are no unassigned tasks, yellow if there are less than five unassigned tasks, and red if there are five or more unassigned tasks.

```
var numTasks = "<DATA_COLUMN_UnassignedTasks>";
var image;

if (numTasks == 0)
    image = "images/green.gif";
else if (numTasks < 5)
    image = "images/yellow.gif";
else
    image = "images/red.gif";

return_value=image;
```

### 3. Click **Done**.

The Add Display Column dialog box closes and the new column is added to the Create Portlet Definition (List) page.

## Editing Columns

To modify an existing column in a list portlet:

1. Select the column to be modified and click Edit (or double-click the column).

The Edit Display Column: *<Column Title>* dialog box opens.

HP logo Close Window X

Edit Display Column: Status

\*Column Title: Status

\*Column Type: Text

\*Visible Text Source: STATUS Source contains HTML

Column Width: Small

Truncate after: Characters Show Full Text in Tooltip

Tooltip Source: Source contains HTML

User Sortable: Yes No

Display: Optional - Available for display by user  
By Default - Shown in user's initial view  
In Maximized View Only - Shown by default in Maximized View  
Always - Cannot be removed by user

Hyperlink Options: No Hyperlink  
Hyperlink Source: COPY\_URL  
Drilldown to Portlet: TMG - Total Hrs by Work Item Edit

Done Cancel

Copyright © 2004 Mercury Close Window X

2. Make the desired changes using the information from the table in [step 2 on page 101](#) as a guideline.



Many fields are dependent on the value for **Column Type** and the applicable fields may be described in multiple sections of that table.

3. Click **Done**.

The Edit Display Column: *<Column Title>* dialog box closes and any applicable changes are noted on the Create Portlet Definition (List) page.

## Deleting Columns

To delete an existing column from a list portlet:

1. Select the column to be removed.
2. Click **Delete**.

The column is deleted from the Create Portlet Definition (List) page.

## Pivot Table Portlet

Figure 3-5. Set up Display Options for pivot table portlets

Create Portlet Definition (Pivot Table)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Dimension**

Data columns may be displayed in the pivot row, column dimensions or used as paging filters.

[Add Column](#) [Add Measurement](#) [Edit](#) [Delete](#)

Click on a column to select, double-click to edit

Data columns displayed in the pivot Row Dimension

[▲](#)  
[▼](#)

Data columns displayed in the pivot Column Dimension

[▲](#)  
[▼](#)

Data columns used as pivot paging filters

[▲](#)  
[▼](#)

Data columns used as pivot measurements

[▲](#)  
[▼](#)

---

**Display Options**

☒ Enable aggregation configuration    Aggregation function: [Count](#) ▼  
☐ Display empty cells    Totals aggregation function: [Sum](#) ▼  
☐ Display row/column totals  
☐ Display subtotals

Hyperlink Options: ☐ No Hyperlink    ☐ Drilldown to Portlet: (None) [Edit](#)  
☒ Portlet Event: [Edit](#)

---

[Cancel](#) [◀ Back](#) [Next ▶](#)

Table 3-2. Set up Display Options field descriptions for pivot table portlets  
(page 1 of 3)

Field Name (*Required)	Description
<b>Dimension section</b>	
Add Column	Click to add a new data column. See <a href="#">Adding a Pivot Table Row, Column, or Paging Filter Data Column</a> for details.
Add Measurement	Click to add a new measurement data column. See <a href="#">Adding a Pivot Table Measurement Data Column</a> for details.
Edit	Select a data column, then click to make changes to that data column. You can also double-click on a specific data column to edit that data column.
Delete	Select a data column, then click to remove that column.
Data columns displayed in the pivot row dimension	Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This data is displayed one row per category.
Data columns displayed in the pivot column dimension	Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This data is displayed one column per category.
Data columns used as pivot paging filters	Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This data is displayed one table per category.

Table 3-2. Set up Display Options field descriptions for pivot table portlets  
(page 2 of 3)

Field Name (*Required)	Description
Data columns used as pivot measurements	Use the up- and down-pointers to rearrange the order of the data columns. Double-click on a data column to edit it. This is the data that is summarized in the table.
<b>Display Options section</b>	
Enable aggregation configuration	By default, aggregation is enabled. Aggregation configuration is the calculation of values based on the selected <b>Totals aggregation function</b> . Disable aggregation if the data source aggregates the data.
Aggregation function	Select a function to determine how to calculate a value if the data source contains more than one value for a distinct data column.
Display empty cells	If the data source does not contain any data, the row or column is not displayed. Select this checkbox to display empty cells.
Totals aggregation function	Select a function to determine how to calculate the totals for the displayed values.

Table 3-2. Set up Display Options field descriptions for pivot table portlets  
(page 3 of 3)

Field Name (*Required)	Description
Display row/column totals	Select to display totals for all rows and columns. The value is calculated using the selected <b>Totals aggregation function</b> .
Display subtotals	Select to display subtotals for each row or column. The value is calculated using the selected <b>Totals aggregation function</b> .
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

## Adding a Pivot Table Row, Column, or Paging Filter Data Column

To add a new data column (row, column, or paging filter) to a pivot table portlet:

1. Click **Add Column**.

The Add Pivot Column dialog box opens.

Add Pivot Column

\*Column Title:

\*Data Source Column:

Dimension

☐ Add this column to the pivot rows dimension

☐ Add this column to the pivot columns dimension

☒ Add this column as a pivot paging filter

Done Cancel

2. Provide the column details using the information from the following table.

Field Name (*Required)	Description
*Column Title	Specify the column title to display in the portlet. Type any alphanumeric string (up to 200 characters in length).
*Data Source Column	Select a source column for the information to display in the pivot table column.
Dimension	<p>Select the dimension of the data. Choices include:</p> <ul style="list-style-type: none"><li>• <b>Add this column to the pivot rows dimension.</b> Data is displayed one row per category. Categories are determined by the values from the data source.</li><li>• <b>Add this column to the pivot columns dimension.</b> Data is displayed one column per category. Categories are determined by the values from the data source.</li><li>• <b>Add this column as a pivot paging filter.</b> Data is displayed one table per category. Categories are determined by the values from the data source.</li></ul>

3. Click **Done**.

The Add Pivot Column dialog box closes and a new data column is added to the Create Portlet Definition (Pivot Table) page.

## Adding a Pivot Table Measurement Data Column

To add a new measurement data column to a pivot table portlet:

1. Click **Add Measurement**.

The Add Measurement dialog box opens.

Add Measurement

\*Column Title:

\*Data Source Column:

Symbol: ☒ None ☐ % ☐ Currency Symbol

\*Number Precision:  digits following the decimal point

Done Cancel

2. Provide the column details using the information from the following table.

Field Name (*Required)	Description
*Column Title	Specify the column title to display in the portlet. Type any alphanumeric string (up to 200 characters in length).
*Data Source Column	Select a source column for the information to display in the pivot table.
Symbol	Select the symbol to display for the measurement. Choices include: <ul style="list-style-type: none"><li>• <b>None</b>. Do not display a symbol.</li><li>• <b>%</b>. Display the percentage symbol.</li><li>• <b>Currency Symbol</b>. Select the currency symbol to display.</li></ul>
*Number Precision	Specify the number of decimal places to display.

3. Click **Done**.

The Add Measurement dialog box closes and a new measurement data column is added to the Create Portlet Definition (Pivot Table) page.



Figure 3-6. Set up Display Options for bar chart portlets

**Create Portlet Definition (Bar Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences  
 5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Bar Source:

Bar Axis Label:

\*Bar Value Source:

Value Axis Label:

Orientation:

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source:

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample Bar Chart

Cancel Back Next

Table 3-3. Set up Display Options field descriptions for bar chart portlets  
(page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Bar Source	Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source.
Bar Axis Label	Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length.)
*Bar Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source.

Table 3-3. Set up Display Options field descriptions for bar chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Value Axis Label	Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.)
Orientation	Indicate the orientation of the bars. Choices include: <ul style="list-style-type: none"> <li>• Horizontal</li> <li>• Vertical</li> </ul>
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 131</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

## Clustered Bar Chart Portlet

Figure 3-7. Set up Display Options for clustered bar chart portlets

**Create Portlet Definition (Clustered Bar Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Cluster Source:

Cluster Axis Label:

\*Bar Source:

Bar Label:

\*Bar Value Source:

Value Axis Label:

Orientation:

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source:

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

**Sample Clustered Bar Chart**

Bar Label

Table 3-4. Set up Display Options field descriptions for clustered bar chart portlets (page 1 of 3)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Cluster Source	Select a source column for the information to be displayed in the cluster. Choices are limited to those columns available in your portlet data source.
Cluster Axis Label	Specify the label for the cluster axis. Type any alphanumeric string (up to 200 characters in length.)
*Bar Source	Select a source column for the information to be displayed for the bars. Choices are limited to those columns available in your portlet data source.

Table 3-4. Set up Display Options field descriptions for clustered bar chart portlets (page 2 of 3)

Field Name (*Required)	Description
Bar Label	Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length.)
*Bar Value Source	Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar). Choices are limited to those columns available in your portlet data source.
Value Axis Label	Specify the label for the value axis. Type any alphanumeric string (up to 200 characters in length.)
Orientation	Indicate the orientation of the bars. Choices include: <ul style="list-style-type: none"> <li>• Horizontal</li> <li>• Vertical</li> </ul>

Table 3-4. Set up Display Options field descriptions for clustered bar chart portlets (page 3 of 3)

Field Name (*Required)	Description
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 131</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

## Stacked Bar Chart Portlet

Figure 3-8. Set up Display Options for stacked bar chart portlets

**Create Portlet Definition (Stacked Bar Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Bar Source:

Bar Axis Label:

\*Bar Division Source:

Bar Division Label:

\*Bar Division Value Source:

Value Axis Label:

Orientation:

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source:

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

**Sample Stacked Bar Chart**

**Chart Title**

**Bar Axis Label**

**Bar Division Label**

Bar Division F Bar Division G Bar Division H  
Bar Division I Bar Division J

Table 3-5. Set up Display Options field descriptions for stacked bar chart portlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Bar Source	Select a source column for the information to be displayed on the bar axis. Choices are limited to those columns available in your portlet data source.
Bar Axis Label	Specify the label for the bar axis. Type any alphanumeric string (up to 200 characters in length).
*Bar Division Source	Select the source column for the bar divisions. Choices are limited to those columns available in your portlet data source.
Bar Division Label	Specify the label for the bar divisions.

Table 3-5. Set up Display Options field descriptions for stacked bar chart portlets (page 2 of 2)

Field Name (*Required)	Description
*Bar Division Value Source	<p>Select a <i>numeric</i> source column for the information to be displayed on the value axis (the length of each bar).</p> <p>Choices are limited to those columns available in your portlet data source.</p>
Value Axis Label	<p>Specify the label for the value axis.</p> <p>Type any alphanumeric string (up to 200 characters in length.)</p>
Orientation	<p>Indicate the orientation of the bars.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• Horizontal</li> <li>• Vertical</li> </ul>
Color Source	<p>Select the source for the color.</p> <p>See <a href="#">Selecting Portlet Colors on page 131</a> for details.</p>
Tooltip Source	<p>Select the source column for the tooltip to be displayed when the cursor hovers over an item.</p> <p>Choices are limited to those columns available in your portlet data source.</p>
Hyperlink Options	<p>Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page.</p> <p>Choices include:</p> <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

Figure 3-9. Set up Display Options for pie chart portlets

**Create Portlet Definition (Pie Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences  
 5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*Wedge Source:

\*Wedge Size Source:

Wedge Label:

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source:

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample Pie Chart

Chart Title	Wedge Label
Total: N (Wedge Source Value Total)	20% Wedge A
	25% Wedge B
	45% Wedge C
	8% Wedge D
	2% Wedge E

Table 3-6. Set up Display Options field descriptions for pie chart portlets  
(page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*Wedge Source	Select the source column for the wedge (pie slice). Choices are limited to those columns available in your portlet data source.
*Wedge Size Source	Select the <i>numeric</i> source column which determines the size of each wedge. Choices are limited to those columns available in your portlet data source.
Wedge Label	Specify a label for the wedges. Type any alphanumeric string (up to 200 characters in length).



Table 3-6. Set up Display Options field descriptions for pie chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 131</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

## Line Chart Portlet

Figure 3-10. Set up Display Options for line chart portlets

**Create Portlet Definition (Line Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. **Set up Display Options** ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

Chart Subtype:

\* X-Axis Source:

X-Axis Scale:

X-Axis Label:

\* Y-Axis Source:

Y-Axis Label:

\* Line Source:

Line Label:

Color Source:

Tooltip Source:

Hyperlink Options: ☒ No Hyperlink  
☐ Hyperlink Source:   
☐ Drilldown to Portlet:    
☐ Portlet Event:

Sample Line Chart

Line Label

Line G Line H Line I  
Line J Line K

Table 3-7. Set up Display Options field descriptions for line chart portlets  
(page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
Chart Subtype	Select <b>Line</b> to set up display options for this portlet.
*X-Axis Source	Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source.
X-Axis Scale	Select a scale for the x-axis. Choices include <b>ordinal</b> (an ordered sequence or ranking) and <b>numeric</b> .
X-Axis Label	Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length).

Table 3-7. Set up Display Options field descriptions for line chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
*Y-Axis Source	Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source.
Y-Axis Label	Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length).
*Line Source	Select the source column for each line. Choices are limited to those columns available in your portlet data source.
Line Label	Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length).
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 131</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

## XY (Scatter) Line Chart Portlet

Select an XY line chart to display data points without connecting lines.

Figure 3-11. Set up Display Options for XY (scatter) line chart portlets

**Create Portlet Definition (Line Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---


**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

Chart Subtype: XY (Scatter) ▼

\* X-Axis Source: ASSIGNED\_TO\_EMAIL ▼

X-Axis Scale: Ordinal ▼ 

X-Axis Label: ASSIGNED\_TO\_EMAIL

\* Y-Axis Source: ASSIGNED\_TO\_EMAIL ▼

Y-Axis Label: ASSIGNED\_TO\_EMAIL

\* Series Source: ASSIGNED\_TO\_EMAIL ▼

Series Label: ASSIGNED\_TO\_EMAIL

Color Source:

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source: ASSIGNED\_TO\_EMAIL ▼

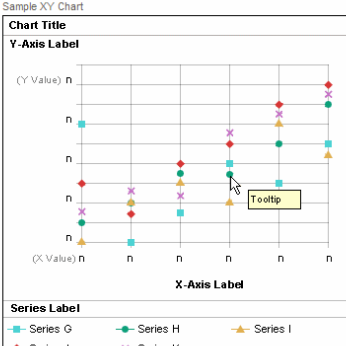
☐ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample XY Chart

Chart Title

Y-Axis Label



X-Axis Label

Series Label

Series G Series H Series I  
Series J Series K

Table 3-8. Set up Display Options field descriptions for XY (scatter) line chart portlets (page 1 of 3)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
Chart Subtype	Select <b>XY (Scatter)</b> to set up display options for this portlet.
*X-Axis Source	Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source.
X-Axis Scale	Select a scale for the x-axis. Choices include <b>ordinal</b> (an ordered sequence or ranking) and <b>numeric</b> .

Table 3-8. Set up Display Options field descriptions for XY (scatter) line chart portlets (page 2 of 3)

Field Name (*Required)	Description
X-Axis Label	Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length).
*Y-Axis Source	Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source.
Y-Axis Label	Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length).
*Series Source	Select the source column for each series. Choices are limited to those columns available in your portlet data source.
Series Label	Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length).

Table 3-8. Set up Display Options field descriptions for XY (scatter) line chart portlets (page 3 of 3)

Field Name (*Required)	Description
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 131</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

## Radar (Spider) Line Chart Portlet

Select a radar line chart to display cyclic data or data that has no natural order. This chart uses the polar coordinate system.

Figure 3-12. Set up Display Options for radar (spider) line chart portlets

**Create Portlet Definition (Line Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

**Chart Title:**

**Chart Subtype:** Radar (Spider) ▼

**\* Category Source:** ASSIGNED\_TO\_EMAIL ▼

**Category Scale:** Ordinal ▼

**\* Distance Source:** ASSIGNED\_TO\_EMAIL ▼

**\* Line Source:** ASSIGNED\_TO\_EMAIL ▼

**Line Label:**

**Color Source:**

**Tooltip Source:**

**Hyperlink Options:**

☒ No Hyperlink

☐ Hyperlink Source: ASSIGNED\_TO\_EMAIL ▼

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

**Sample Radar Chart**

Table 3-9. Set up Display Options field descriptions for radar (spider) line chart portlets (page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
Chart Subtype	Select <b>Radar (Spider)</b> to set up display options for this portlet.
*Line Source	Select the source column for each line. Choices are limited to those columns available in your portlet data source.
Line Label	Specify a label for the legend. Type any alphanumeric string (up to 200 characters in length).

Table 3-9. Set up Display Options field descriptions for radar (spider) line chart portlets (page 2 of 2)

Field Name (*Required)	Description
*Category Source	Select the source column for each category on the angular coordinate. Choices are limited to those columns available in your portlet data source.
Category Scale	Select a scale for the category. Choices include <b>ordinal</b> (an ordered sequence or ranking) and <b>numeric</b> .
*Distance Source	Select the source column for each radial coordinate (distance from the center pole). Choices are limited to those columns available in your portlet data source.
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors on page 131</a> for details.
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet. See <a href="#">Defining a Drill-down Page on page 78</a> for details.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>



## Bubble Chart Portlet

Figure 3-13. Set up Display Options for bubble chart portlets

**Create Portlet Definition (Bubble Chart)**

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ **3. Set up Display Options** ▶ 4. Define Preferences  
5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

---

**Data Source Mapping to Chart**

Select a data source column to map to each chart property:

Chart Title:

\*X-Axis Source:

X-Axis Label:

\*Y-Axis Source:

Y-Axis Label:

\*Bubble Size Source:

Bubble Size Label:

Color Source:

Color Label Source:

Color Label:

Tooltip Source:

Hyperlink Options: ☒ No Hyperlink  
☐ Hyperlink Source:    
☐ Drilldown to Portlet: (None)   
☐ Portlet Event:

**Sample Bubble Chart**

**Color Label**

Color Label A Color Label B Color Label C

Table 3-10. Set up Display Options field descriptions for bubble chart portlets  
(page 1 of 2)

Field Name (*Required)	Description
Chart Title	Specify a name for the chart. Type any alphanumeric string (up to 200 characters in length).
*X-Axis Source	Select the source column for the x-axis. Choices are limited to those columns available in your portlet data source.
X-Axis Label	Specify a label for the x-axis. Type any alphanumeric string (up to 200 characters in length).
*Y-Axis Source	Select the <i>numeric</i> source column for the y-axis. Choices are limited to those columns available in your portlet data source.

Table 3-10. Set up Display Options field descriptions for bubble chart portlets  
(page 2 of 2)

Field Name (*Required)	Description
Y-Axis Label	Specify a label for the y-axis. Type any alphanumeric string (up to 200 characters in length).
*Bubble Size Source	Select the source column for the size of the bubble. Choices are limited to those columns available in your portlet data source.
Bubble Size Label	Specify the label for the bubble size. Type any alphanumeric string (up to 200 characters in length).
Color Source	Select the source for the color. See <a href="#">Selecting Portlet Colors</a> for details.
Color Label Source	Select the source for the labels associated with the colors.
Color Label	Specify the label for the legend. Type any alphanumeric string (up to 200 characters in length).
Tooltip Source	Select the source column for the tooltip to be displayed when the cursor hovers over an item. Choices are limited to those columns available in your portlet data source.
Hyperlink Options	Specify whether the column can be linked to another page or portlet, or updates the other portlets on this page. Choices include: <ul style="list-style-type: none"> <li>• <b>No Hyperlink.</b> Links to other pages are not allowed.</li> <li>• <b>Hyperlink Source.</b> Link to the selected column.</li> <li>• <b>Drilldown to Portlet.</b> Drill down to the selected portlet.</li> <li>• <b>Portlet Event.</b> Update the portlets on this page. See <a href="#">Defining a Portlet Event on page 94</a> for details.</li> </ul>

# Selecting Portlet Colors

Most of the portlet types include the option to specify particular colors for a portlet. Unlike the default color map that selects and changes the colors seemingly at random, the colors you specify will always be used when the portlet is displayed.

To specify color mappings for a portlet requires configuration of the:

- Portlet data source
- Portlet definition

## Defining Color Maps in the Portlet Data Source

To specify a color map for a portlet, refer to [Chapter 2, \*Creating and Maintaining Portlet Data Sources\*, on page 17](#). In the section [Completing the Data Source Tab on page 25](#), you will need to add (or modify) columns to specify the color map.

In general, color mappings:

- Should correspond to the column used in the Order By clause
- Can be indicated for one or more of the Order By values
- Color can be specified by:
  - Name (such as LemonChiffon)
  - Hexadecimal code (for example, #FFFACD)

Names or codes are case-insensitive. That is, DarkGoldenRod is the same as DARKgoldenROD and #B8860B is the same as #b8860b.

[Appendix A, \*Color Names\*, on page 153](#), provides a comprehensive list of color names and some recommendations about their use.



Specific colors can also be specified based on portlet field labels; however, these settings are instance-wide. This can be especially helpful for making colors consistent for field labels such as High, Medium, or Low. See the *Customizing the Standard Interface* guide for details.

*Figure 3-14* shows examples of these settings in the **Select** section of the Select/From tab of the Query Definition window (see [Chapter 2, Creating and Maintaining Portlet Data Sources](#), on page 17 for details about this window).

- The values for priority\_code column include the priorities associated with a request (of the type being displayed in this portlet):
  - Normal
  - Low
  - High
  - Critical
  - None
- The Display\_Order column ranks the values of the priority codes
- The Order By clause specifies the use of the Display\_Order column
- The Color column specifies the relationship of the colors to the display order as follows:
  - Wheat (by hexadecimal code) for Normal
  - MistyRose for Low
  - The default color for High (which means the color is subject to change)
  - CadetBlue for Critical
  - Tomato for None



The colors shown in this example, as well as the choice of portlet are probably unrealistic. You probably want to select colors that are meaningful to your organization and more practical than those selected for this example.

Figure 3-14. Color map in the portlet data source

Query Definition

SelectFrom | WhereFilter | Group By/Order By |

Select

You can use any Database columns or SQL expression to create columns for the SELECT portion of the query and enter the FROM portion directly.

Column Name	Column Type	Description	SQL
something1	Text	something1	something1
priority_code	Text	priority code	decode(priority_code,NULL,'None',priority_code,priority_code)
Color	Text	color	decode(priority_code,NULL,'tomato','NORMAL','F5DEB3','LOW','mistyrose','CRITICAL','CadetBlue')
Display_order	Text	order	decode(priority_code,NULL,1,'NORMAL',2,'LOW',3,'HIGH',4,'CRITICAL',5)

Add

Edit

Remove

From Clause:

FROM somewhere

Enlarge

Where/Group By/Having/Order By Clauses:

WHERE 1=1  
group by priority\_code  
order by display\_order

View Full Query

OK

Apply

Cancel

Ready

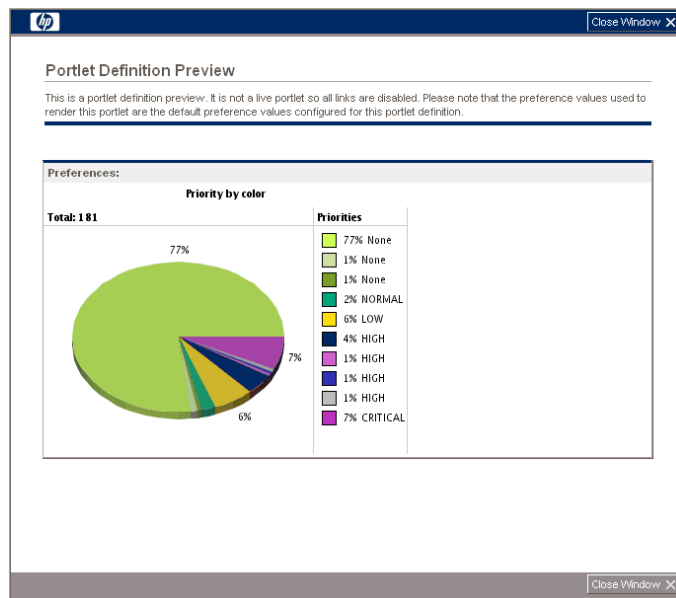
## Specifying the Color Map in the Portlet Definition

Once a portlet data source includes a color map, you can specify its use in a color specification-enabled portlet.

*Figure 3-15* shows a preview of a pie chart that uses the default color map.

As shown in *Figure 3-17 on page 135*, specifying a color map can help establish consistency of the portlet coloration and, potentially, its interpretation.

Figure 3-15. Default color map



To specify use of a color map available in a portlet's data source, select the color map's column for the **Color Source** as shown in *Figure 3-16*.

Figure 3-16. Set up Display Options with color specification

Create Portlet Definition (Pie Chart)

1. Choose Portlet Type ▶ 2. Enter Portlet Information ▶ 3. Set up Display Options ▶ 4. Define Preferences

5. Configure Portlet Communication ▶ 6. Configure Access ▶ 7. Add User Help

Data Source Mapping to Chart

Select a data source column to map to each chart property:

Chart Title: Priority by Color

\*Wedge Source: priority\_code

\*Wedge Size Source: Total

Wedge Label: Priorities

Color Source: Color

Tooltip Source:

Hyperlink Options:

☒ No Hyperlink

☐ Hyperlink Source: Color

☐ Drilldown to Portlet: (None)

☐ Portlet Event:

Sample Pie Chart

Chart Title

Total: 11 (Wedge Source Value Total)

20% 20% Wedge A

25% 25% Wedge B

45% 45% Wedge C

8% 8% Wedge D

2% 2% Wedge E

25%

45% (Wedge Size)

2%

8%

20%

Tooltip

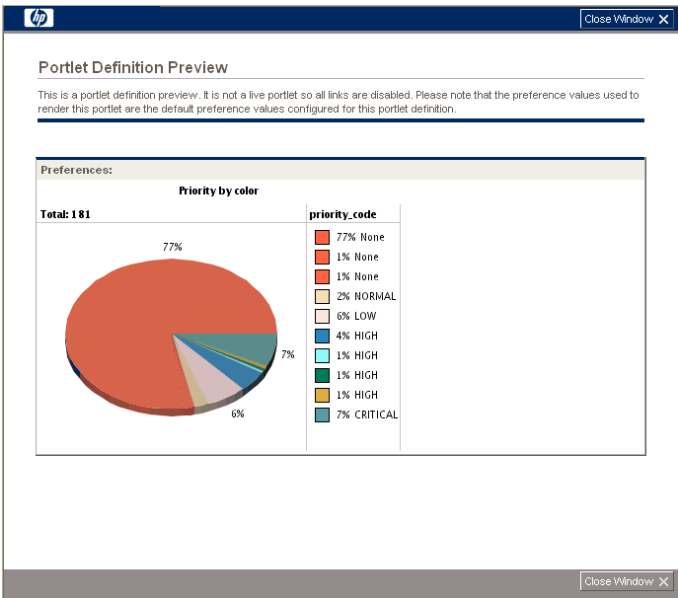
Cancel

Back

Next

The resulting preview is shown in *Figure 3-17*.

Figure 3-17. Selected color mappings







---

## 4 Creating and Maintaining PPM Dashboard Pages and Modules

### About PPM Dashboard Pages and Modules

Modules are either provided by HP or application administrators and can be supplied to users as either preconfigured Dashboard pages or “shared.” Modules must have a unique name and can contain one or more Dashboard pages, each with one or more portlets.

#### Preconfigured Dashboard Pages

Preconfigured Dashboard pages are modules that users can add to their Private pages folder. These pages are useful in situations where users routinely use the same (basic) page setup. These preconfigured Dashboard pages can be edited and personalized by users to increase their usefulness. Preconfigured Dashboard pages are provided by either HP or application administrators.

#### HP-Provided Preconfigured Pages

Preconfigured Dashboard pages that are provided by HP are added using the **Add preconfigured pages** drop-down menu item located on the Personalize Dashboard page (see *Figure 4-1*). Once clicked, the Add Preconfigured Pages to Dashboard dialog box opens (see *Figure 4-2*).

## Application Administrator-Provided Preconfigured Pages

Preconfigured Dashboard pages that are provided by application administrators appear in the Shared pages folder on the Personalize Dashboard page (such as Sample, shown in *Figure 4-1*). Once moved to the Private pages folder (using **Copy** and **Paste** functionality) the module can be personalized by the user; modules appearing in the Shared pages folder cannot be edited.

Figure 4-1. Personalize Dashboard page

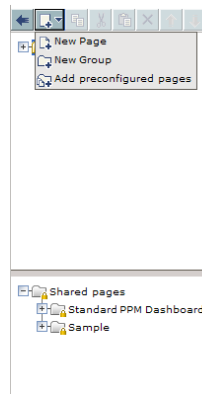
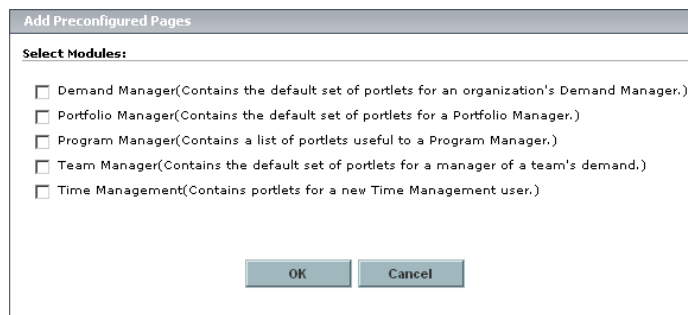


Figure 4-2. Add Preconfigured Pages to Dashboard dialog box



## Shared Dashboard Pages

Shared Dashboard pages are modules that are created by application administrators and users find these in their Shared pages folder. Shared modules can be configured such that users can copy them to the Private pages folder and edit them (therefore behaving much like preconfigured Dashboard pages), or shared modules can be made uneditable—these type of modules are especially useful when application administrators want to share specific details and status with their stakeholders.

## Landing Page (Default PPM Dashboard Page)

The landing page is the default PPM Dashboard page that displays when a user logs on to PPM Center. This page can be configured by the application administrator.

If the user does not have access to the module that contains the landing page, the user's first private page is used as the default PPM Dashboard page. If the user also does not have any private pages configured, the first shared page is used as the default PPM Dashboard page.

For information on how to configure this page, see [Configuring the Landing Page \(Default PPM Dashboard Page\)](#) on page 150.

# Searching for Modules

To search for an existing module:

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

The Configure Modules page appears.

Configure Modules

Search for a Module to Configure

Reset Form

Name starts with:

Created By:

Last Updated From:

To:

Available to Users:

Groups:

Org-Units:

Status:

All

Sort By:

Name

Ascending

Descending

Results Displayed Per Page:

50

Search

- 3. Provide the search criteria using the information from the following table.

Field Name (*Required)	Description
Name starts with	<p>Specify a string. The search results display all modules whose name starts with the specified string.</p> <p>Type any alphanumeric string (up to 255 characters in length).</p>
Created By	Select the user who created the module.
Last Updated From <Date> To <Date>	Select the date range when the module was last updated.
Available to Users	Select one or more users who have access to the module.
Groups	Select one or more groups who have access to the module.

Field Name (*Required)	Description
Org-Units	Select one or more groups who have access to the module.
Status	Select the status criteria: Choices include: <ul style="list-style-type: none"> <li>• All</li> <li>• Enabled</li> <li>• Disabled</li> </ul>
Sort By	Select the sort criteria. Choices include: <ul style="list-style-type: none"> <li>• Name</li> <li>• Last Updated On</li> <li>• Status</li> </ul>
Ascending/Descending	Indicate the sorting sequence.
*Results Displayed Per Page	Specify the maximum number of search results to display on a page. Type any integer, including zero.



Click **Reset Form** if you would like to clear your current search criteria.

#### 4. Click **Search**.

The Configure Modules page is updated to include the search results which are displayed in the **Select a Module to Configure** section. If the list of results is long, click **Prev** and **Next** to navigate the list.

Configure Modules

These Modules are maintained only by Administrators. Users that wish to personalize module pages must copy the pages to their private dashboard area.

Select a Module to Configure

Showing 1 to 10 of 10

PrevNext

Name	Description	Last Updated On	Status
<input type="checkbox"/> AH - TEMP	just a test. should be deleted	March 12, 2007	Enabled
<input type="checkbox"/> AH - test 2		March 12, 2007	Enabled
<input type="checkbox"/> Capital Exposure	Dashboard to display the state of capitalized costs in the current portfolio broken down by project.	March 12, 2007	Enabled
<input type="checkbox"/> Demand Manager	Contains the default set of portlets for an organization's Demand Manager.	March 12, 2007	Enabled
<input type="checkbox"/> New Module	dsmplr	March 12, 2007	Enabled
<input type="checkbox"/> Portfolio Manager	Contains the default set of portlets for a Portfolio Manager.	March 12, 2007	Enabled
<input type="checkbox"/> Program Manager	Contains a list of portlets useful to a Program Manager.	March 12, 2007	Enabled
<input type="checkbox"/> Standard PPM Dashboard	Standard PPM Dashboard	March 12, 2007	Enabled
<input type="checkbox"/> Team Manager	Contains the default set of portlets for a manager of a team's demand.	March 12, 2007	Enabled
<input type="checkbox"/> Time Management	Contains portlets for a new Time Management user.	March 12, 2007	Enabled

Configure ModulesAllNone

Search for a Module to Configure

Reset Form

Name starts with:

Created By:

Last Updated From:

To:

Available to Users:

Groups:

Org-Units:

Status:

All

Sort By:

Name

Ascending

Descending

Results Displayed Per Page:

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Search

From the Configure Modules page you can:

- **Select a module.** In the **Select a Module to Configure** section, either select the checkbox associated with the desired module or click the link for the module.
- **Delete a module.** In the **Select a Module to Configure** section, click the delete icon next to the module you want to delete.
- **Sort the modules.** In the **Select a Module to Configure** section, click on a column header to change the sort criteria or sequence.
- **Refine your search.** In the **Search for a Module to Configure** section, provide the search criteria detailed in [step 3](#).

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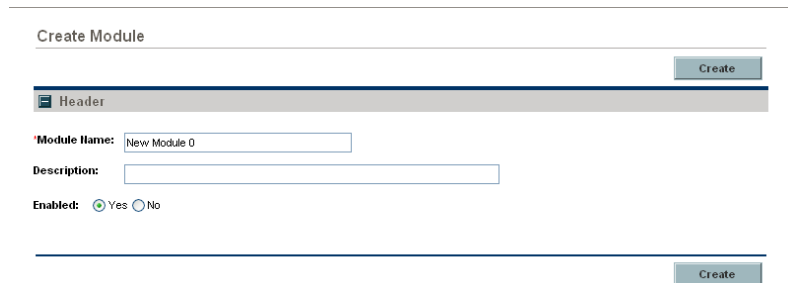
Chapter 4

# Creating Modules

To create a module:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Create a Module**.

The Create Module page appears.



Create Module

Create

Header

Module Name: New Module 0

Description:

Enabled: ☒ Yes ☐ No

Create



If you are already in the Personalize Dashboard page, you can highlight **Modules** and select **New Module** from the drop-down menu to create a new module.

3. In the **Module Name** field, type the name of the module.
4. (Optional, although highly recommended) In the **Description** field, type a brief description of the module.
5. (Optional) Select the desired **Enabled** option.

6. Click **Create**.

The Personalize Dashboard page appears and includes the Configure: *<Module\_Name>* display.

Configure: New Module 0

Save

**Header**

Created By: Admin User

Last Modified By: Admin User    Last Modification Date: Mar 12, 2007

Module Name: New Module 0

Description: Sample

Enabled: ☒ Yes ☐ No

**Administrator Comments**

Comments enables the administrator to share information about changes in the module with the module recipients.

Add Comment:

View Comments

**Configure Access**

**Read-Only Access**

The following users/security-groups will have read-only access to this module

☐ Allow access to all users

Allow access only to the following users/security-groups:

**Administrator Access**

Users specified below will have access to modify this Module.

Security Type	Name
All Users	

Give Access to: User  Add



The contents of the page may differ depending on the module chosen.

7. (Optional) In the **Header** section, update the data in the appropriate fields.
8. (Optional, although highly recommended) In the **Administrator Comments** section, add comments as desired.



Click **Save** before clicking **View Comments** to view the comments you just added.

9. In the **Configure Access** section, specify to whom, and the type of, access of the module should be granted.

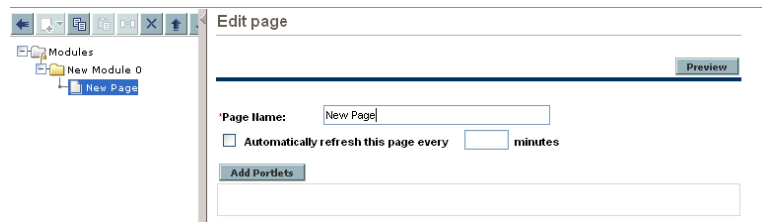


10. Add Dashboard pages and portlets as desired.

a. To add a page, either:

- Select the **New Page** file from the folder containing the new module
- Select the module from the Modules folder and select either **Add >** **Add New Page** or **Add > Add user pages** (following a right-click).

The Personalize Dashboard page appears and includes the Edit page display.

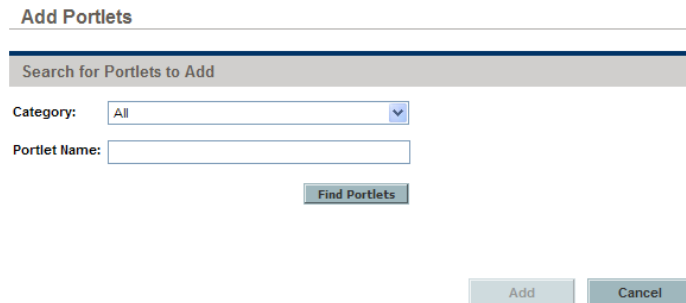


b. (Optional) Rename the page.

c. (Optional) Set the page refresh rate.

d. Click **Add Portlets**.

The Add Portlets dialog box appears.



e. Search for portlets to add.

- To list all the portlets, click **Find Portlets**. The **Select Portlets to Add** section is added to the Add Portlets dialog. The **Select Portlets to Add** section lists all the portlets.

- To list specific portlets:
  - i. In **Category**, select the portlet's category from the drop-down list.
  - ii. In **Portlet Name**, provide all or part of the portlet's name.
  - iii. Click **Find Portlets**.

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

- f. In the **Select Portlets to Add** section, select one or more portlets and click **Add**.
  - g. (Optional) Click **Preview** to review the results.
11. Repeat [step 10](#) until the module is configured as desired.



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

## Sharing Modules

To share a module:

1. Select the module name from the Modules folder.
2. In the Header section, select the **Yes** option for **Enabled**.
3. In the Configure Access section, select the **Allow access to all users** and **Enable users to copy this module pages to their private dashboard** checkboxes.
4. Click **Save**.

# Copying Modules

To copy an existing module and use it as the basis for a new module:

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

The Configure Modules page appears, as shown in [step 2 on page 140](#).

3. Search for and select a module.

For complete information on how to search for and select modules, see [Searching for Modules on page 140](#).

The Personalize Dashboard page appears, as shown in [step 6 on page 144](#).

4. Select the name of the module from the Modules folder.
5. Click the **Clone** icon (or right-click the module name and select **Clone**).

An advisory dialog box appears.

6. Click **OK**.

A copy of the module will appear in the Modules folder.

7. Select the name of the copied module.
8. Change the settings of the copied module using the steps detailed in [Creating Modules on page 143](#).



Remember to enable the module once the settings are updated.

9. Click **Save**.

# Modifying Modules

To change an existing module:

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

The Configure Modules page appears, as shown in [step 2 on page 140](#).

3. Search for and select a module.

For detailed instructions on how to search for and select modules, see [Searching for Modules on page 140](#).

The Personalize Dashboard page appears, as shown in [step 6 on page 144](#).

4. From this page, you can do the following:
  - Change the contents or accessibility of a module, see [Creating Modules on page 143](#).
  - Copy the module, see [Copying Modules on page 147](#).
  - Remove the module, see [Deleting Modules](#).



If your PPM Center instance supports multiple languages and the module is defined in a language other than your session language, you cannot modify the module. For more information click **here** in the header or see [Multilingual User Interface Guide](#).

# Deleting Modules

To delete an existing module:

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

The Configure Modules page appears, as shown in [step 2 on page 140](#).

3. Search for and select a module.

For complete information on how to search for and select modules, see [Searching for Modules on page 140](#).

The Personalize Dashboard page appears, as shown in [step 6 on page 144](#).

4. Select the name of the module from the Modules folder.
5. Click the **Delete** icon (or right-click the module name and select **Delete**).

A confirmation dialog box opens.

6. Click **OK**.

# Configuring the Landing Page (Default PPM Dashboard Page)

The landing page is the default PPM Dashboard page that is configured to display when a user logs on to PPM Center. This page is configured by the application administrator to meet the business requirements of users or security groups.



If a default PPM Dashboard page is not configured, the first private page listed in the Private pages folder becomes the default page. If no private pages have been configured, the first shared page listed in the Shared pages folder becomes the default page.

To configure the default PPM Dashboard page you must set the landing page and configure the module's access:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**.

The Set Landing page appears.

3. Select the **Enable default Landing page** checkbox.
4. Select the name of the module that contains the default landing page.
5. Select the name of the page.
6. Click **Save**.

The message The Landing page has been successfully configured. In order to set the Landing Page users' access, configure the parent module's access appears above the Configure Landing Page section.

7. Click **configure the parent module's access**.

The Configure: *<module\_name>* page appears.

8. Expand the Configure Access section and add read-only access for all users or selected users.
9. Click **Save**.

# Changing the Landing Page

Changing the landing page is changing the default PPM Dashboard page that displays when a user logs on to PPM Center. For information on how to modify or edit the contents of the landing page, see the *Getting Started* Guide.

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**.

The Set Landing page appears.

3. Select the name of the module that contains the default landing page.
4. Select the name of the page.
5. Click **Save**.

The message The Landing page has been successfully configured. In order to set the Landing Page users' access, configure the parent module's access appears above the Configure Landing Page section.

6. Click **configure the parent module's access**.

The Configure: *<module\_name>* page appears.

7. Expand the Configure Access section and add read-only access for all users or selected users.
8. Click **Save**.

# Disabling the Landing Page

You can disable the landing page by either disabling the feature or by disabling the module's access. When the landing page is disabled, the first page listed in the Private pages folder becomes the default PPM Dashboard page. If no private pages are configured, the first page listed in the Shared pages folder becomes the default PPM Dashboard page.

To disable the landing page without changing the module's access:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**. The Set Landing page appears.
3. Unselect the **Enable default Landing page** checkbox.
4. Click **Save**.

To disable the landing page by disabling the module's access:

1. Log on to PPM Center.
2. From the menu bar, select **Open > Administration > Modules > Configure Default Dashboard Page**. The Set Landing page appears.
3. Click **Save**.

The message The Landing page has been successfully configured. In order to set the Landing Page users' access, configure the parent module's access appears above the Configure Landing Page section.

4. Click **configure the parent module's access**.

The Configure: *<module\_name>* page appears.

5. Expand the Configure Access section and remove read-only access for all users or selected users.
6. Click **Save**.



# A Color Names

This appendix provides the table of color names that are supported by most browsers. These are the color names referenced in *Selecting Portlet Colors* on page 131.

It is important to note that only 16 color names are supported in the W3C HTML 4.0 standard (aqua, black, blue, fuchsia, gray, green, lime, maroon, navy, olive, purple, red, silver, teal, white, and yellow). If you have concerns about browser compatibility, or are planning to export the portlet, you should use the hexadecimal values rather than the color names.

To view the colors themselves, go to [www.w3.org/TR/css3-color/#html4](http://www.w3.org/TR/css3-color/#html4) and locate the section documenting SVG color keywords.

Table A-1. Color names (page 1 of 7)

Color Name	Hex Value
AliceBlue	#F0F8FF
AntiqueWhite	#FAEBD7
Aqua	#00FFFF
Aquamarine	#7FFFD4
Azure	#F0FFFF
Beige	#F5F5DC
Bisque	#FFE4C4
Black	#000000
BlanchedAlmond	#FFEBCD

Table A-1. Color names (page 2 of 7)

Color Name	Hex Value
Blue	#0000FF
BlueViolet	#8A2BE2
Brown	#A52A2A
BurlyWood	#DEB887
CadetBlue	#5F9EA0
Chartreuse	#7FFF00
Chocolate	#D2691E
Coral	#FF7F50
CornflowerBlue	#6495ED
Cornsilk	#FFF8DC
Crimson	#DC143C
Cyan	#00FFFF
DarkBlue	#00008B
DarkCyan	#008B8B
DarkGoldenrod	#B8860B
DarkGray	#A9A9A9
DarkGreen	#006400
DarkKhaki	#BDB76B
DarkMagenta	#8B008B
DarkOliveGreen	#556B2F
DarkOrange	#FF8C00
DarkOrchid	#9932CC
DarkRed	#8B0000
DarkSalmon	#E9967A

Table A-1. Color names (page 3 of 7)

Color Name	Hex Value
DarkSeaGreen	#8FBC8F
DarkSlateBlue	#483D8B
DarkSlateGray	#2F4F4F
DarkTurquoise	#00CED1
DarkViolet	#9400D3
DeepPink	#FF1493
DeepSkyBlue	#00BFFF
DimGray	#696969
DodgerBlue	#1E90FF
Feldspar	#D19275
FireBrick	#B22222
FloralWhite	#FFFAF0
ForestGreen	#228B22
Fuchsia	#FF00FF
Gainsboro	#DCDCDC
GhostWhite	#F8F8FF
Gold	#FFD700
GoldenRod	#DAA520
Gray	#808080
Green	#008000
GreenYellow	#ADFF2F
HoneyDew	#F0FFF0
HotPink	#FF69B4
IndianRed	#CD5C5C

Table A-1. Color names (page 4 of 7)

Color Name	Hex Value
Indigo	#4B0082
Ivory	#FFFFFF0
Khaki	#F0E68C
Lavender	#E6E6FA
LavenderBlush	#FFF0F5
LawnGreen	#7CFC00
LemonChiffon	#FFFACD
LightBlue	#ADD8E6
LightCoral	#F08080
LightCyan	#E0FFFF
LightGoldenrodYellow	#FAFAD2
LightGrey	#D3D3D3
LightGreen	#90EE90
LightPink	#FFB6C1
LightSalmon	#FFA07A
LightSeaGreen	#20B2AA
LightSkyBlue	#87CEFA
LightSlateBlue	#8470FF
LightSlateGray	#778899
LightSteelBlue	#B0C4DE
LightYellow	#FFFFE0
Lime	#00FF00
LimeGreen	#32CD32
Linen	#FAF0E6

Table A-1. Color names (page 5 of 7)

Color Name	Hex Value
Magenta	#FF00FF
Maroon	#800000
MediumAquaMarine	#66CDAA
MediumBlue	#0000CD
MediumOrchid	#BA55D3
MediumPurple	#9370D8
MediumSeaGreen	#3CB371
MediumSlateBlue	#7B68EE
MediumSpringGreen	#00FA9A
MediumTurquoise	#48D1CC
MediumVioletRed	#C71585
MidnightBlue	#191970
MintCream	#F5FFFA
MistyRose	#FFE4E1
Moccasin	#FFE4B5
NavajoWhite	#FFDEAD
Navy	#000080
OldLace	#FDF5E6
Olive	#808000
OliveDrab	#6B8E23
Orange	#FFA500
OrangeRed	#FF4500
Orchid	#DA70D6
PaleGoldenrod	#EEE8AA

Table A-1. Color names (page 6 of 7)

Color Name	Hex Value
PaleGreen	#98FB98
PaleTurquoise	#AFEEEE
PaleVioletRed	#D87093
PapayaWhip	#FFEFD5
PeachPuff	#FFDAB9
Peru	#CD853F
Pink	#FFC0CB
Plum	#DDA0DD
PowderBlue	#B0E0E6
Purple	#800080
Red	#FF0000
RosyBrown	#BC8F8F
RoyalBlue	#4169E1
SaddleBrown	#8B4513
Salmon	#FA8072
SandyBrown	#F4A460
SeaGreen	#2E8B57
SeaShell	#FFF5EE
Sienna	#A0522D
Silver	#C0C0C0
SkyBlue	#87CEEB
SlateBlue	#6A5ACD
SlateGray	#708090
Snow	#FFFAFA

Table A-1. Color names (page 7 of 7)

Color Name	Hex Value
SpringGreen	#00FF7F
SteelBlue	#4682B4
Tan	#D2B48C
Teal	#008080
Thistle	#D8BFD8
Tomato	#FF6347
Turquoise	#40E0D0
Violet	#EE82EE
VioletRed	#D02090
Wheat	#F5DEB3
White	#FFFFFF
WhiteSmoke	#F5F5F5
Yellow	#FFFF00
YellowGreen	#9ACD32





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