

# HP Project and Portfolio Management Center

Software Version: 8.00

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## HP-Supplied Entities Guide

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# 1 HP-Supplied Reports

The following table lists the reports provided as part of PPM Center. Availability depends on having the applicable licenses, security group assignment, access grants, and products.

In the table, the subheadings are alphabetized categories, and the reports are alphabetized within each category. The table indicates which reports are available in two categories, and such reports are described in more detail in the first of the two categories.



Users must have the System: Submit Reports access grant to view or submit any report, in addition to required security groups shown in the following table.

|                                | Report Name             | Required License    | Required Security Group  | Description   |
|--------------------------------|-------------------------|---------------------|--|---|
| <b>Administrative category</b> |                         |                     |  |   |
| 1                              | Contact Synchronization | Configuration       | <p>One or more of the following security groups:</p> <ul style="list-style-type: none"> <li>● PPM Administrator</li> <li>● PPM All Access Grants</li> <li>● PPM Billing Manager</li> <li>● PPM Cost Manager</li> <li>● PPM Demand Management Administrator</li> <li>● PPM Demand Manager</li> <li>● PPM Deployment Management Administrator</li> <li>● PPM Program Manager</li> <li>● PPM Project Manager</li> <li>● PPM Resource Manager</li> <li>● PPM Service Security Group</li> <li>● PPM Team Manager</li> <li>● PPM Time Administrator</li> <li>● PPM Time Manager</li> <li>● PPM User</li> <li>● PPM User Admin</li> </ul> | <p>Ensures that contacts are properly defined. Detects all users with no corresponding contact record, and creates one for them. Also corrects discrepancies between user and contact data.</p> <p>Also available for the Resource Management category.</p> |
| 2                              | Data Source Detail      | Configuration       |  | Shows the configuration details of one or more data sources. Provides all filter fields, displayed columns, query, and what uses each data source.  |
| 3                              | Import Requests         | Configuration       |  | Validates and loads request data from the open interface tables into the data model.  |
| 4                              | Import Users            | User Administration |  | Imports data from the user interface tables or an LDAP server.  |
| 5                              | Lookup Types            | Configuration       |  | Shows the configuration details of one or more lookups.   |
| 6                              | Notification History    | Configuration       |  | Shows notifications that have been sent or are pending.   |

|    | Report Name                | Required License | Required Security Group | Description  |
|----|----------------------------|------------------|-------------------------|--|
| 7  | Object Type Detail         | Configuration    |                         | Shows the configuration details of one or more object types. Includes detailed information about each field and command associated with selected object types. Also useful for debugging deployment problems.        |
| 8  | Overview Section Detail    | Configuration    |                         | Shows the configuration details of one or more Overview Sections. Provides all filter fields, displayed columns, query, security, URLs, and which users use each Overview Section.                                   |
| 9  | Portlet Definition Detail  | Configuration    |                         | Shows the configuration details of one or more Portlet Definitions. Details all preferences, display options, access, and help for each Portlet Definition.  |
| 10 | Report Type Detail         | Configuration    |                         | Shows the configuration details of one or more report types. Includes detailed information about each field and command associated with selected report types. Also useful for debugging report submission problems. |
| 11 | Request Header Type Detail | Configuration    |                         | Shows the configuration details of one or more request header types. Useful for auditing your setup as well as debugging problems related to specific request header types.  |
| 12 | Request Type Detail        | Configuration    |                         | Shows the configuration details of one or more request types. Details all custom fields, possible statuses, default logic, and commands for each request type.   |

|    | Report Name                         | Required License    | Required Security Group | Description   |
|----|-------------------------------------|---------------------|-------------------------|---|
| 13 | Run Field Security Denormalization  | Configuration       |                         | Runs field-level security-related denormalization tasks for particular entities.  |
| 14 | Run PPM Organization Unit Interface | User Administration |                         | Imports data from the organization unit interface tables or an LDAP server.   |
| 15 | Run PPM Package Interface           | Configuration       |                         | Validates and loads package data from the open interface tables into the data model.  |
| 16 | Run Workflow Transaction Interface  | Configuration       |                         | Validates and runs workflow transactions based on data present in the workflow open interface tables. Used to kick off process steps from outside the end-user screens. |
| 17 | Security Group Detail               | User Administration |                         | Shows the configuration details of one or more security groups. Includes user membership, workflow step access, and screen access levels for each selected group.       |
| 18 | SOX - Security Change               | Any                 |                         | Provides the history of security changes.   |
| 19 | SOX - Security Validation           | Any                 |                         | Lists users with multiple roles through security groups linked to workflow steps.   |
| 20 | Special Command Detail              | Any                 |                         | Shows the configuration details of one or more special commands. Useful for debugging execution problems.   |
| 21 | Synchronize Meta Layer              | Configuration       |                         | Assesses or synchronizes the Meta Layer.  |

|    | Report Name         | Required License    | Required Security Group | Description  |
|----|---------------------|---------------------|-------------------------|--|
| 22 | Translation Details | Configuration       |                         | For the languages and entity types or particular entities you select, shows the entity name highlighted in its definition language and translations to any other selected languages.             |
| 23 | Translation Summary | Configuration       |                         | For the languages and entity types you select, shows the entity name, the language in which it is defined, and the other languages to which it has been translated or partially translated.      |
| 24 | User Data Detail    | Configuration       |                         | Shows the definition of custom user data fields. Output is grouped by user data entity and lists all fields for each entity and any referenced validations.                                      |
| 25 | User Detail         | User Administration |                         | Shows the configuration details of one or more users. Includes header details as well as security group membership.<br>Also available for the Resource Management category.                      |
| 26 | Validations         | Configuration       |                         | Shows the configuration details of one or more validations.  |
| 27 | Workflow Detail     | Configuration       |                         | Shows the configuration details of one or more workflows. Includes all workflow steps and their possible outcomes, transitions, and notifications. Also useful for analyzing workflow processes. |
| 28 | Workflow Statistics | Configuration       |                         | Shows workflow statistics, such as percent usage of a particular workflow, average/maximum/minimum completion times, percent step traversal, and so forth.                                       |

|                                   | Report Name                               | Required License  | Required Security Group | Description   |
|-----------------------------------|---|-------------------|-------------------------|---|
| <b>Demand Management category</b> |   |                   |                         |   |
| 29                                | Contact Detail                            | Demand Management |                         | Shows the details of one or more contacts.  |
| 30                                | Demand Creation History                   | Demand Management |                         | Shows the demand creation history by period and by various demand fields. Useful for exporting request data to Microsoft® Excel or other data analysis tools. |
| 31                                | Historical SLA Violations                 | Demand Management |                         | Shows the historical SLA violations period by various demand categories. Useful for exporting request data to Microsoft Excel or other data analysis tools.   |
| 32                                | ALM - Change Summary                      | Demand Management |                         | Provides a list of requests for change (RFCs) that have been implemented, grouped by change category.   |
| 33                                | ALM - Forward Schedule of Changes for RFC | Demand Management |                         | Serves as a key report in the change management process. Provides a list of all the RFCs that are scheduled to be implemented.                                |
| 34                                | ALM - Forward Schedule of Releases        | Demand Management |                         | Serves as a key report in the release management process. Provides a list of all releases that are scheduled to be implemented into the LIVE environment.     |
| 35                                | ALM - Release Content                     | Demand Management |                         | Provides a list of RFCs that have been incorporated into a release.   |
| 36                                | ALM - Release Summary                     | Demand Management |                         | Provides a list of releases that have been implemented.   |

|    | Report Name                               | Required License  | Required Security Group | Description   |
|----|---|-------------------|-------------------------|---|
| 37 | Request Detail                            | Demand Management |                         | Audits the details of one or more requests. Includes header and detail information, notes, and status for each selected request.  |
| 38 | Request Detail (Filter by Custom Fields)  | Demand Management |                         | Audits the details of one or more requests, which can be filtered by a request type's custom field values. Includes header and detail information, notes, and status for each selected request.                                       |
| 39 | Request History                           | Demand Management |                         | Audits the transaction history of one or more requests. Details the complete history of the request workflow and fields configured for auditing, showing every status change (date, time, user responsible) for every step traversed. |
| 40 | Request Quick View                        | Demand Management |                         | Shows a quick summary of open and closed requests, categorized by priority. Also shows request activity for the current week and other selected information.  |
| 41 | Request Summary                           | Demand Management |                         | Categorizes and tallies requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.   |
| 42 | Request Summary (Filter by Custom Fields) | Demand Management |                         | Categorizes and tallies requests based on flexible criteria. Lists total counts, and optionally subtotal counts, for the categories selected.   |

|                                       | Report Name                          | Required License      | Required Security Group | Description  |
|---------------------------------------|--------------------------------------|-----------------------|-------------------------|--|
| 43                                    | Satisfied Demand History             | Demand Management     |                         | Shows satisfied demand history by period and by various demand fields. Useful for exporting request data to Microsoft Excel or other data analysis tools.  |
| <b>Deployment Management category</b> |                                      |                       |                         |  |
| 44                                    | Compare Custom Database Setup        | Deployment Management |                         | Compares custom aspects of two databases (either SQL Server or Oracle®). With this report it is possible to compare actual data as well as object definitions.                                   |
| 45                                    | Compare Filesystem Environments      | Deployment Management |                         | Compares the directory structure and files of two computer file systems. Reports either all files or differences only, as filtered by owner, permissions, content, file type, or directory name. |
| 46                                    | Compare MS SQL Server 7 Environments | Deployment Management |                         | Compares the data model and database objects (tables, views, procedures, and triggers) of two Microsoft SQL Server 7 databases. Reports either all objects or differences only.                  |
| 47                                    | Compare Oracle Environments          | Deployment Management |                         | Compares the data model (tables, indexes, and so forth) and database objects (packages, views, triggers, and so forth) of two Oracle schemas. Reports either all objects or differences only.    |
| 48                                    | Distribution Detail                  | Deployment Management |                         | Shows the contents and results of a particular distribution of a release. Useful for a high-level view of a distribution and analyzing execution results.  |



|    | Report Name                                | Required License      | Required Security Group | Description   |
|----|--|-----------------------|-------------------------|---|
| 49 | Environment Comparison                     | Deployment Management |                         | Compares the configuration details of multiple environments. Queries every main environment field and application specified, and reports differences.   |
| 50 | Environment Comparison by Objects Migrated | Deployment Management |                         | Compares the migration history of multiple environments. Lists objects that were migrated into one specified environment but not the other, and can also flag objects migrated into both environments but at different times. |
| 51 | Environment Detail                         | Deployment Management |                         | Shows the configuration details of one or more environments. Includes attributes of environment hosts, databases, and applications. Encrypted passwords are not displayed.  |

|    | Report Name                   | Required License      | Required Security Group  | Description   |
|----|-------------------------------|-----------------------|--|---|
| 52 | Environment Group Detail      | Deployment Management | <p>One or more of the following security groups:</p> <ul style="list-style-type: none"> <li>● PFM - Finance Review Board</li> <li>● PFM - IT Steering Committee</li> <li>● PFM - Standards Committee</li> <li>● PPM 6.0 Upgrade Workbench Access</li> <li>● PPM Administrator</li> <li>● PPM All Access Grants</li> <li>● PPM Billing Manager</li> <li>● PPM Cost Manager</li> <li>● PPM Demand Management Administrator</li> <li>● PPM Demand Manager</li> <li>● PPM Deployment Management Administrator</li> <li>● PPM Program Manager</li> <li>● PPM Project Manager</li> <li>● PPM Resource Manager</li> <li>● PPM Service Security Group</li> <li>● PPM Team Manager</li> <li>● PPM Time Administrator</li> <li>● PPM Time Manager</li> <li>● PPM User</li> <li>● PPM User Admin</li> </ul> | Shows the configuration details of one or more environment groups. Details the environments and applications encompassed by the group.                    |
| 53 | Environments / Objects Detail | Deployment Management |  | Tracks migration activity in a specific environment. Lists objects that have been migrated to one or more specified environments, grouped by environment. |
| 54 | Object History                | Deployment Management |  | Tracks the movement of specific types of objects through your processes. Lists all executions for a given object type and date range.                     |

|    | Report Name                   | Required License      | Required Security Group | Description   |
|----|-------------------------------|-----------------------|-------------------------|---|
| 55 | Objects / Environments Detail | Deployment Management |                         | Tracks migration activity in a specific environment. Lists objects that have been migrated to one or more specified environments, grouped by object type.   |
| 56 | Package Change History        | Deployment Management |                         | Audits the package changes and includes assignment information, line order, and line details for each selected package.   |
| 57 | Package Details               | Deployment Management |                         | Audit the details of one or more packages. Includes header information, notes, and line details for each selected package.  |
| 58 | Package History               | Deployment Management |                         | Audits the transaction history of one or more packages. Details the complete workflow history for each package line, showing every status change (date, time, user responsible) for every step traversed.               |
| 59 | Package Impact Analysis       | Deployment Management |                         | Analyzes the impact of a given package based on audit history. Lists information such as other packages containing the same objects, missing objects that were potentially relevant in previous packages, and so forth. |
| 60 | Packages Pending              | Deployment Management |                         | Generates a worklist of packages pending user action. Lists key details about open packages with pending activity, facilitating work prioritization, monitoring, and quick action decisions.                            |

|    | Report Name    | Required License      | Required Security Group   | Description  |
|----|----------------|-----------------------|---|--|
| 61 | RCS Check In   | Deployment Management |   | If you use PPM Center and RCS, checks a file into the RCS repository.  |
| 62 | RCS Check Out  | Deployment Management |   | If you use PPM Center and RCS, checks out a file from RCS repository.  |
| 63 | Release Detail | Deployment Management | <p>One or more of the following security groups:</p> <ul style="list-style-type: none"> <li>● PFM - Finance Review Board</li> <li>● PFM - IT Steering Committee</li> <li>● PFM - Standards Committee</li> <li>● PPM 6.0 Upgrade: Workbench Access</li> <li>● PPM Administrator</li> <li>● PPM All Access Grants</li> <li>● PPM Billing Manager</li> <li>● PPM Cost Manager</li> <li>● PPM Demand Management Administrator</li> <li>● PPM Demand Manager</li> <li>● PPM Deployment Management Administrator</li> <li>● PPM Program Manager</li> <li>● PPM Project Manager</li> <li>● PPM Resource Manager</li> <li>● PPM Service Security Group</li> <li>● PPM Team Manager</li> <li>● PPM Time Administrator</li> <li>● PPM Time Manager</li> <li>● PPM User</li> <li>● PPM User Admin</li> </ul> | Shows the contents of a release. Lists all requests, packages, and distributions associated with a release.  |
| 64 | Release Notes  | Deployment Management |   | Audits all requests and packages contained in a release. Can be used to create a list of bugs fixed and patches applied within a specific release. |

|                                      | Report Name             | Required License   | Required Security Group | Description  |
|--------------------------------------|-------------------------|--------------------|-------------------------|--|
| <b>Financial Management category</b> |                         |                    |                         |  |
| 65                                   | Project Cost Breakdown  | Project Management |                         | Shows the costs for the project and the activities with which the costs are associated. Labor and non-labor costs are included in the totals.<br>Also available for the Project Management category. |
| 66                                   | Project Cost Details    | Project Management |                         | Shows cost details for a project. Also available for the Project Management category.  |
| <b>Project Management category</b>   |                         |                    |                         |  |
| 67                                   | Baseline Comparison     | Project Management |                         | Compares the current schedule to a baseline or compares baselines.   |
| 68                                   | Project Cost Breakdown  |                    |                         | See <a href="#">Project Cost Breakdown on page 21</a> in the Financial Management category.  |
| 69                                   | Project Cost Details    |                    |                         | See <a href="#">Project Cost Details on page 21</a> in the Financial Management category.  |
| <b>Resource Management category</b>  |                         |                    |                         |  |
| 70                                   | Contact Synchronization |                    |                         | See <a href="#">Contact Synchronization on page 10</a> in the Administrative category.   |
| 71                                   | User Detail             |                    |                         | See <a href="#">User Detail on page 13</a> in the Administrative category.   |
| 72                                   | Work Allocation Details | Time Management    |                         | Shows information about work allocations from HP Time Management.<br>Also available for the Time Management category.  |

|                                 | Report Name             | Required License | Required Security Group | Description  |
|---------------------------------|-------------------------|------------------|-------------------------|--|
| <b>Time Management category</b> |                         |                  |                         |  |
| 73                              | Actual Time Summary     | Time Management  |                         | Shows actual time information by a variety of groupings and filters.   |
| 74                              | Delinquent Time Sheets  | Time Management  |                         | Shows information about delinquent time sheets.  |
| 75                              | Time Sheet Details      | Time Management  |                         | Shows detailed information for one or more time sheets. Includes work item information and time reported against each work item. |
| 76                              | Time Sheet Summary      | Time Management  |                         | Shows time sheet information by a variety of groupings and filters.  |
| 77                              | Work Allocation Details |                  |                         | See <a href="#">Work Allocation Details on page 21</a> in the Resource Management category.                                      |

## 2 HP-Supplied Portlets

The following table lists the portlets provided as part of PPM Center. Availability depends on having the applicable access grants and products.

In the table, the subheadings are alphabetized categories, and the portlets are alphabetized within each category. The table indicates which portlets are available in two categories, and such portlets are described in more detail in the first of the two categories.

Many of the portlet names in the table are links to corresponding example screen images in [Chapter 3, Portlet Examples](#), on page 39.

|                     | Portlet Name                            | Required Access Grant  | Description   |
|---------------------|---|--|---|
| <b>ALM category</b> |   |  |   |
| 1                   | <a href="#">ALM - Deployed Releases</a> | Access restricted to members of the ALM - Release Manager security group | Lists recently deployed releases.   |
| 2                   | <a href="#">ALM - My Releases</a>       | Access restricted to members of the ALM - Release Manager security group | Lists release requests that have been created by or assigned to the logged-on user. |
| 3                   | <a href="#">ALM - My RFCs</a>           | Access restricted to members of the ALM - Change Manager security group  | Lists RFCs that have been created by or assigned to the logged-on user.             |

|    | Portlet Name                           | Required Access Grant  | Description  |
|----|--|--|--|
| 4  | <i>ALM - Open Releases</i>             | Access restricted to members of the ALM - Release Manager security group   | Lists releases that do not have the status of <b>Closed</b> .  |
| 5  | <i>ALM - Open RFCs</i>                 | Access restricted to members of the ALM - Change Manager security group  | Lists RFCs that are currently being worked on.   |
| 6  | <i>ALM - Releases</i>                  | None. HP recommends that you configure this portlet to restrict access to members of the ALM - Release Manager security group. | Lists release requests. If PPM Center is integrated with HP Change Control Management, the portlet provides a link for each request to log in to HP Change Control Management, where various tabs provide information about the request. |
| 7  | <i>ALM - Releases By Category</i>      | Access restricted to members of the ALM - Release Manager security group   | Shows a pie chart with the percentage of releases in each category.  |
| 8  | ALM - Releases By List                 | Access restricted to members of the ALM - Release Manager security group   | Lists releases that meet the specified portlet preferences.  |
| 9  | <i>ALM - Releases By Type</i>          | Access restricted to members of the ALM - Release Manager security group   | Shows a pie chart with the percentage of releases of each type.  |
| 10 | <i>ALM - RFCs By Category</i>          | Access restricted to members of the ALM - Change Manager security group  | Shows a pie chart with the percentage of RFCs in each category.  |
| 11 | <i>ALM - RFCs By Reason for Change</i> | Access restricted to members of the ALM - Change Manager security group  | Shows a pie chart with the percentage of RFCs by each type of change being considered (for example, new feature, enhancement, or defect fix).  |



|    | Portlet Name                  | Required Access Grant   | Description   |
|----|-------------------------------|---|---|
| 12 | <i>ALM - RFCs By Status</i>   | None. HP recommends that you configure this portlet to restrict access to members of the ALM - Change Manager security group. | Shows a pie chart with the percentage of RFCs of each status. |
| 13 | ALM - RFCs By Status - List   | Access restricted to members of the ALM - Change Manager security group   | Lists RFCs that meet the specified portlet preferences.       |
| 14 | <i>ALM - RFCs per Release</i> | Access restricted to members of the ALM - Release Manager security group  | Lists the RFCs that constitute a release.                     |

### Financial Management category

|    |                                      |  |   |
|----|--------------------------------------|--|---|
| 15 | <i>Capitalized Project Breakdown</i> | Portfolio Mgmt: Portfolio Manager access grant | Shows a list of projects that meet your filter criteria, with capitalized cost information. If you want this portlet to list the source data for any of the graphical Capitalized Project Timelines, Impairment Risks, or Total Exposure portlets, use the same filter criteria in this portlet and those.<br>Also available for the Portfolio Management category. |
| 16 | Capitalized Project Timelines        | Portfolio Mgmt: Portfolio Manager access grant | Shows a Gantt chart for projects with capitalized costs, with start date, end date, and health of each project.<br>Also available for the Portfolio Management category.  |
| 17 | Impairment Risks                     | Portfolio Mgmt: Portfolio Manager access grant | Shows a pie chart of active projects that have capitalized costs, chosen by project health and sorted by project.<br>Also available for the Portfolio Management category.  |

|    | Portlet Name                        | Required Access Grant   | Description  |
|----|-------------------------------------|---|--|
| 18 | <i>Program Cost Summary</i>         | One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit Work Plan Cost Data</li> <li>• View Project, Program, and Time Sheet Cost Data</li> </ul> | Shows a program's planned labor, non-labor, and total costs and corresponding actuals.<br>Also available for the Program Management category.                    |
| 19 | <i>Project Cost Summary</i>         | One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit Work Plan Cost Data</li> <li>• View Project, Program, and Time Sheet Cost Data</li> </ul> | Shows a project's planned labor, non-labor, and total costs and corresponding actuals, as well as earned value data.   |
| 20 | <i>Project Current Cost Metrics</i> | One or more of the following Financial Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit Work Plan Cost Data</li> <li>• View Project, Program, and Time Sheet Cost Data</li> </ul> | Analyzes current cost metrics for projects.  |
| 21 | Total Exposure                      | Portfolio Mgmt: Portfolio Manager access grant  | Shows a pie chart of active projects that have capitalized costs, grouped by the health of the project.<br>Also available for the Portfolio Management category. |

### Packages category

|    |                    |  |  |
|----|--------------------|--|--|
| 22 | <i>My Packages</i> | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows all packages created by, or assigned to, the current user. Provides the ability to drill down on any package to view its details, such as the workflow status and package lines.   |
| 23 | Package Activity   | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows activity information about the number of deployments (package line execution step transactions) completed during the last three weeks. Provides the ability to drill down to any object type or environment to view the included packages. |

|    | Portlet Name                     | Required Access Grant  | Description   |
|----|----------------------------------|--|---|
| 24 | <i>Package List</i>              | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows general information about PPM Center packages, such as their description and status.  |
| 25 | Package References               | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows the references that are attached to the package based on filters such as reference types, relationship, and the time period when they were added. |
| 26 | <i>Package Summary Bar Chart</i> | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows a bar chart summary of packages.  |
| 27 | <i>Package Summary Pie Chart</i> | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows a pie chart summary of packages.  |
| 28 | Pending Deployment               | One or more of the following Deployment Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Packages</li> <li>• Edit Packages</li> <li>• View Packages</li> </ul> | Shows general information about packages that have not been deployed and provides visibility into scheduled or required package migration.              |

### Portfolio Management category

|    |                              |   |  |
|----|------------------------------|---|--|
| 29 | <i>Budget by Asset Class</i> | One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a bar chart of the breakdown of budget by asset class for a what-if scenario from an existing scenario comparison. |
|----|------------------------------|---|--|

|    | Portlet Name                         | Required Access Grant  | Description  |
|----|--------------------------------------|--|--|
| 30 | Budget by Business Objective         | <p>One or more of the following Portfolio Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a bar chart of the breakdown of budget by business objective for a what-if scenario from an existing scenario comparison.  |
| 31 | Budget by Project Class              | <p>One or more of the following Portfolio Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a bar chart of the breakdown of budget by project class for a what-if scenario from an existing scenario comparison.   |
| 32 | Budget Summary                       | <p>One or more of the following Portfolio Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a stacked bar chart of operating expenses and capital expenses for a what-if scenario from an existing scenario comparison.  |
| 33 | <i>Capitalized Project Breakdown</i> |  | See <a href="#">Capitalized Project Breakdown on page 25</a> in the Financial Management category.   |
| 34 | Capitalized Project Timelines        |  | See <a href="#">Capitalized Project Timelines on page 25</a> in the Financial Management category.   |
| 35 | <i>Cost Benefit Analysis</i>         | <p>One or more of the following Portfolio Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a bar chart of cost/benefit analysis for a what-if scenario from an existing scenario comparison.  |
| 36 | <i>Current Portfolio Map</i>         | Portfolio Mgmt: Portfolio Manager access grant   | For the current portfolio of all proposals, projects, and assets, shows a bubble chart that is highly configurable in terms of the metrics represented by the horizontal and vertical axes and by the sizes and colors of the bubbles. |

|    | Portlet Name                          | Required Access Grant   | Description  |
|----|---------------------------------------|---|--|
| 37 | Impairment Risks                      |   | See <a href="#">Impairment Risks on page 25</a> in the Financial Management category.  |
| 38 | <a href="#">Portfolio By Category</a> | Portfolio Mgmt: Portfolio Manager access grant  | Shows a bar chart of monetary metrics for the proposals, projects and assets in the current portfolio, ordered by a selected category.           |
| 39 | <a href="#">Total Budget</a>          | One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a line graph, per period, of the budget requirement and availability for all the what-if scenarios from an existing scenario comparison.   |
| 40 | Total Exposure                        |   | See <a href="#">Total Exposure on page 26</a> in the Financial Management category.  |
| 41 | Total Resource                        | One or more of the following Portfolio Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Scenario Comparisons</li> <li>• Edit Scenario Comparison</li> <li>• View Scenario Comparison</li> </ul> | Shows a line graph, per period, of the resource requirement and availability for all the what-if scenarios from an existing scenario comparison. |

### Program Management category

|    |                                      |  |   |
|----|--------------------------------------|--|---|
| 42 | <a href="#">Issue List</a>           | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Lists the open issues for a program.<br>Also available for the Requests category.         |
| 43 | <a href="#">Program Cost Summary</a> |  | See <a href="#">Program Cost Summary on page 26</a> in the Financial Management category. |
| 44 | <a href="#">Program List</a>         | One or more of the following PMO: access grants: <ul style="list-style-type: none"> <li>• Edit All Programs</li> <li>• Edit Programs</li> <li>• View Programs</li> </ul>         | Displays the programs and their summary conditions.                                       |

|    | Portlet Name                     | Required Access Grant  | Description   |
|----|----------------------------------|--|---|
| 45 | <i>Program Project List</i>      | One or more of the following PMO: access grants: <ul style="list-style-type: none"> <li>• Edit All Programs</li> <li>• Edit Programs</li> <li>• View Programs</li> </ul>         | Shows projects within a specified program. Also available for the Project Management category.        |
| 46 | <i>Program Risk List</i>         | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows open risks associated with a program. Also available for the Requests category.                 |
| 47 | <i>Program Scope Change List</i> | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows open scope change requests associated with a program. Also available for the Requests category. |

### Project Management category

|    |                             |   |   |
|----|-----------------------------|---|---|
| 48 | <i>My Tasks</i>             | One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Projects</li> <li>• Edit Projects</li> <li>• Update Tasks</li> <li>• View Projects</li> </ul> | Shows all of the project tasks assigned to the user that have status of Ready or In Progress and a scheduled start date within two weeks of the current date. Also available for the Time Management category.  |
| 49 | <i>Program Project List</i> |   | See <i>Program Project List</i> on page 30 in the Program Management category.  |
| 50 | <i>Project Gantt</i>        | One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Projects</li> <li>• Edit Projects</li> <li>• Update Tasks</li> <li>• View Projects</li> </ul> | Shows a Gantt chart of projects, tasks, and milestones and can be configured based on such criteria as project and task states, and schedule. Provides the ability to drill down into project and task details. |

|    | Portlet Name                    | Required Access Grant   | Description   |
|----|---------------------------------|---|---|
| 51 | <i>Project Health Pie Chart</i> | One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Projects</li> <li>● Edit Projects</li> <li>● Update Tasks</li> <li>● View Projects</li> </ul>   | Shows a pie chart summary of projects by health.  |
| 52 | <i>Project List</i>             | One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Projects</li> <li>● Edit Projects</li> <li>● Update Tasks</li> <li>● View Projects</li> </ul>   | Shows general information about PPM Center projects, such as how close they are to completion and their scheduled finish date.  |
| 53 | <i>Project Timelines</i>        | One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Projects</li> <li>● Edit Projects</li> <li>● Update Tasks</li> <li>● View Projects</li> </ul>   | Shows an overview of the timelines for a set of projects.   |
| 54 | <i>Resource Gantt</i>           | One or more of the following access grants: <ul style="list-style-type: none"> <li>● Demand Mgmt:               <ul style="list-style-type: none"> <li>- Edit All Requests</li> <li>- Edit Requests</li> <li>- View Requests</li> </ul> </li> <li>● Project Mgmt:               <ul style="list-style-type: none"> <li>- Edit All Projects</li> <li>- Edit Projects</li> <li>- Update Tasks</li> <li>- View Projects</li> </ul> </li> <li>● Resource Mgmt:               <ul style="list-style-type: none"> <li>- Edit All Resources</li> <li>- Edit only resources that I manage</li> <li>- Edit Staffing Profiles</li> <li>- View all resources</li> <li>- View my personal resource info only</li> </ul> </li> </ul> | Shows a Gantt chart reflecting the work items (including requests, tasks, milestones, and staffing profiles) assigned to selected resources. Provides the ability to drill down into work item details. |

|                          | Portlet Name               | Required Access Grant   | Description   |
|--------------------------|----------------------------|---|---|
| 55                       | <i>Summary Task List</i>   | One or more of the following Project Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Projects</li> <li>• Edit Projects</li> <li>• Update Tasks</li> <li>• View Projects</li> </ul> | Displays general information about summary tasks, such as how close they are to completion and their scheduled finish date. |
| <b>Requests category</b> |                            |   |   |
| 56                       | Assignment Queue           | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul>                          | Provides quick assignment capabilities from the PPM Dashboard for demand managers.  |
| 57                       | <i>Consolidated Demand</i> | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul>                          | Shows the demand placed on the user's organization.   |
| 58                       | <i>Demand by Category</i>  | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul>                          | Shows the demand placed on an organization that can be grouped by common demand categories.                                 |
| 59                       | <i>Demand List</i>         | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul>                          | Provides a personalizable list of the demand placed on an organization or individual.                                       |
| 60                       | <i>Issue List</i>          |   | See <i>Issue List</i> on page 29 in the Program Management category.  |



|    | Portlet Name                     | Required Access Grant  | Description  |
|----|----------------------------------|--|--|
| 61 | <i>My Requests</i>               | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows all requests created by or assigned to the current user and provides a critical view into the most pressing requests and approaching deadlines.                      |
| 62 | <i>Open Requests by Priority</i> | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows the number of requests currently open, grouped by priority.  |
| 63 | <i>Program Risk List</i>         |  | See <i>Program Risk List on page 30</i> in the Program Management category.  |
| 64 | <i>Program Scope Change List</i> |  | See <i>Program Scope Change List on page 30</i> in the Program Management category.  |
| 65 | Request Activity                 | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows general activity information about PPM Center requests, such as the number of requests opened and closed during the last two weeks, and the number of open requests. |
| 66 | <i>Request List</i>              | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows general information about PPM Center requests, such as their description and status.   |
| 67 | Request References               | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Requests</li> <li>• Edit Requests</li> <li>• View Requests</li> </ul> | Shows the references that are attached to the request based on filters such as Reference Types, Relationship, and the time period when they were added.                    |

|    | Portlet Name                 | Required Access Grant  | Description   |
|----|------------------------------|--|---|
| 68 | <i>Request Summary</i>       | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul> | Shows information about groups of PPM Center requests, such as their priority, type, status, and the total number of requests for each category. Provides the ability to drill down to detailed requests. |
| 69 | Request Summary Bar Chart    | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul> | Shows a bar chart that summarizes requests.   |
| 70 | Request Summary Pie Chart    | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul> | Shows a pie chart that summarizes requests.   |
| 71 | <i>SLA Exception Roll Up</i> | One or more of the following Demand Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Requests</li> <li>● Edit Requests</li> <li>● View Requests</li> </ul> | Shows the open requests that have triggered SLA exceptions.   |

### Resource Management category

|    |                                |   |  |
|----|--------------------------------|---|--|
| 72 | <i>Analyze Assignment Load</i> | One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>● Edit All Resources</li> <li>● Edit only resources that I manage</li> <li>● View all resources</li> <li>● View my personal resource info only</li> </ul> | Compares the workload for a group of resources against their capacity on the resources' calendars. |
|----|--------------------------------|---|--|

|                                 | Portlet Name                    | Required Access Grant   | Description  |
|---------------------------------|---------------------------------|---|--|
| 73                              | <i>Analyze Resource Pools</i>   | One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Resource Pools</li> <li>• Edit Resource Pools</li> <li>• View All Resource Pools</li> <li>• View Resource Pools</li> </ul>             | Compares the anticipated demand for resources (from the staffing profiles) against the projected capacity of those resources (from a resource pool). |
| 74                              | <i>Resource Pool List</i>       | One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Resource Pools</li> <li>• Edit Resource Pools</li> <li>• View All Resource Pools</li> <li>• View Resource Pools</li> </ul>             | Shows the list of resource pools.  |
| 75                              | <i>Resource Request Portlet</i> |   | Shows the list of staffing profile positions to be fulfilled by a resource pool manager.   |
| 76                              | <i>Staffing Profile List</i>    | One or more of the following Resource Mgmt: access grants: <ul style="list-style-type: none"> <li>• Edit All Staffing Profiles</li> <li>• Edit Staffing Profiles</li> <li>• View All Staffing Profiles</li> <li>• View Staffing Profiles</li> </ul> | Shows the list of staffing profiles.   |
| <b>Time Management category</b> |                                 |   |  |
| 77                              | <i>Approve Time Sheets</i>      | Time Mgmt: Approve Time Sheets  | Shows all the time sheets that have time sheet lines you can approve.  |
| 78                              | <i>My Tasks</i>                 |   | See <i>My Tasks</i> on page 30 in the Project Management category.   |

|    | Portlet Name                  | Required Access Grant  | Description   |
|----|-------------------------------|--|---|
| 79 | <i>My Time Sheets</i>         | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows your time sheets that cover the number of time periods you specify.   |
| 80 | <i>My Work Items</i>          | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Lists all the work items on the user's open time sheets, providing a snapshot of what the user has been working on and to what he has been charging time. |
| 81 | Time Sheet Totals by Resource | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows the time charged by a set of resources, displaying the level of activity (by time) in the current and previous time periods for those users.        |

|    | Portlet Name                                   | Required Access Grant  | Description   |
|----|--|--|---|
| 82 | Time Sheet Totals by Resource Group            | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows the time charged by resource groups, summarizing the totals of all the resources in those groups, and displaying the level of activity (by time) in the current and previous time periods for those groups. |
| 83 | Time Sheet Totals by Work Item                 | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows detailed information on the time allocated to and the time charged for specific work items. Should not be used to display information for all work items but for a specific set based on filter criteria.   |
| 84 | Time Sheet Totals by Work Item, Resource Group | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows the time charged by resource groups, summarizing the totals of all the resources in those groups, and splitting the data by each specific work item.  |

|    | Portlet Name                          | Required Access Grant  | Description   |
|----|---------------------------------------|--|---|
| 85 | Time Sheet Totals for Direct Reports  | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows the total time entered by all the direct reports for a manager or set of managers you specify.  |
| 86 | Work Allocation Details               | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows summary information on the work allocations defined in the system. Especially useful to determine which allocations are nearly used up or actually over budget.                             |
| 87 | Work Item Set Actuals vs. Allocations | <p>One or more of the following Time Mgmt: access grants:</p> <ul style="list-style-type: none"> <li>● Approve Time Sheets</li> <li>● Close Time Sheets</li> <li>● Edit Time Sheet Policies</li> <li>● Edit Time Sheets</li> <li>● View All Time Sheets (Summary Info Only)</li> <li>● View Time Sheet Policies</li> <li>● View Time Sheets</li> </ul> | Shows summary information at the Work Item Set level. Provides a snapshot of which projects or types of work you are spending the most time on, as well as where you have budgeted the most time. |

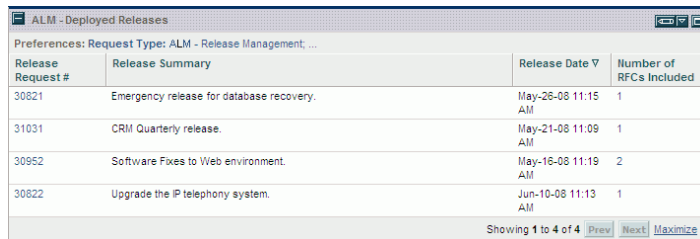
# 3 Portlet Examples

The screen images in this chapter are examples of particular portlets described in [Chapter 2, HP-Supplied Portlets, on page 23](#). The screen images are organized by category in the same order as presented in Chapter 2.

Some portlets are available in two categories in PPM Center. Where applicable, the same examples of those portlets appear in both categories in this chapter.

## ALM Category

### ALM - Deployed Releases



The screenshot shows a web application window titled "ALM - Deployed Releases". Below the title bar, there is a preference bar that reads "Preferences: Request Type: ALM - Release Management, ...". The main content is a table with the following columns: "Release Request #", "Release Summary", "Release Date", and "Number of RFCs Included". The table contains four rows of data. At the bottom right of the table, there is a status bar that says "Showing 1 to 4 of 4" followed by "Prev", "Next", and "Maximize" buttons.

| Release Request # | Release Summary                          | Release Date       | Number of RFCs Included |
|-------------------|--|--------------------|-------------------------|
| 30821             | Emergency release for database recovery. | May-26-08 11:15 AM | 1                       |
| 31031             | CRM Quarterly release.                   | May-21-08 11:09 AM | 1                       |
| 30952             | Software Fixes to Web environment.       | May-16-08 11:19 AM | 2                       |
| 30822             | Upgrade the IP telephony system.         | Jun-10-08 11:13 AM | 1                       |

## ALM - My Releases

| ALM - My Releases                               |            |  |                 |           |                       |                      |
|---|------------|--|-----------------|-----------|-----------------------|----------------------|
| Preferences: Request Type ALM - Release Request |            |  |                 |           |                       |                      |
| Release Request # Δ                             | Release ID | Release Summary  | Type            | Category  | Expected Release Date | Status               |
| 30728   | ITIL_1     | Quarterly Release for the SAP FI Module.   | Full            | Emergency | 2008-06-30 00:00:00   | Pending Test Results |
| 30785   | CRM 2.5    | Minor Changes  | Full            | Minor     | 2008-04-06 11:51:00   | Deployed to TEST     |
| 30818   |            | Please update the Release to have the new version updated from GCRM2.2 to GCRM 2.3 | Package Release | Minor     |                       | Planning             |
| 30819   | ITIL_1.0   | Emergency Fix  | Package Release | Emergency | 2008-04-04 12:12:00   | Accepting RFCs       |
| 30820   | GCRM2.3    | Global Rollout of GCRM2.3  | Full            | Major     |                       | Planning             |

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## ALM - My RFCs

| ALM - My RFCs  |  |          |                       |             |                   |  |
|--|--|----------|-----------------------|-------------|-------------------|--|
| Preferences: Request Type ALM - Request for Change (RFC) |  |          |                       |             |                   |  |
| Request # Δ  | RFC Summary  | Priority | Reported By           | Category    | Status            |  |
| 30642  | Replace failing Cisco router   | Medium   | 2008-03-29 14:23:11.0 | Significant | In CAB Approval   |  |
| 30643  | Create new order management pipeline report to support sales forecasting | Medium   | 2008-03-29 14:33:00.0 | Significant | In CAB Approval   |  |
| 30645  | Add list of values of new country codes                                  | Low      | 2008-03-29 15:05:43.0 | Minor       | Build             |  |
| 30648  | test   | High     | 2008-03-29 15:57:43.0 | Significant | Build             |  |
| 30649  | Reset the consultant username and passwords.                             | High     | 2008-03-29 16:40:25.0 | Major       | Allocate Priority |  |
| 30650  | Reset the consultant username and passwords.                             | High     | 2008-03-29 16:43:46.0 | Major       | Allocate Priority |  |
| 30651  | Reset the consultant username and passwords.                             | High     | 2008-03-29 16:50:03.0 | Major       | Impact Assessment |  |
| 30652  | Reset the consultant username and passwords.                             | High     | 2008-03-29 17:01:51.0 | Major       | Authorized        |  |
| 30653  | Reset the consultant username and passwords.                             | High     | 2008-03-29 17:22:56.0 | Major       | Authorized        |  |
| 30654  | Reset the consultant username and passwords.                             | High     | 2008-03-29 17:32:30.0 | Major       | Build             |  |

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# ALM - Open Releases

| ALM - Open Releases                             |            |  |                 |           |                       |                      |
|---|------------|--|-----------------|-----------|-----------------------|----------------------|
| Preferences: Request Type ALM - Release Request |            |  |                 |           |                       |                      |
| Release Request # Δ                             | Release ID | Release Summary  | Type            | Category  | Expected Release Date | Status               |
| 30728   | ITIL_1     | Quarterly Release for the SAP FI Module.   | Full            | Emergency | 2008-06-30 00:00:00   | Pending Test Results |
| 30785   | CRM 2.5    | Minor Changes  | Full            | Minor     | 2008-04-06 11:51:00   | Deployed to TEST     |
| 30818   |            | Please update the Release to have the new version updated from GCRM2.2 to GCRM 2.3 | Package Release | Minor     |                       | Planning             |
| 30819   | ITIL_1.0   | Emergency Fix  | Package Release | Emergency | 2008-04-04 12:12:00   | Accepting RFCs       |
| 30820   | GCRM2.3    | Global Rollout of GCRM2.3  | Full            | Major     |                       | Planning             |

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# ALM - Open RFCs

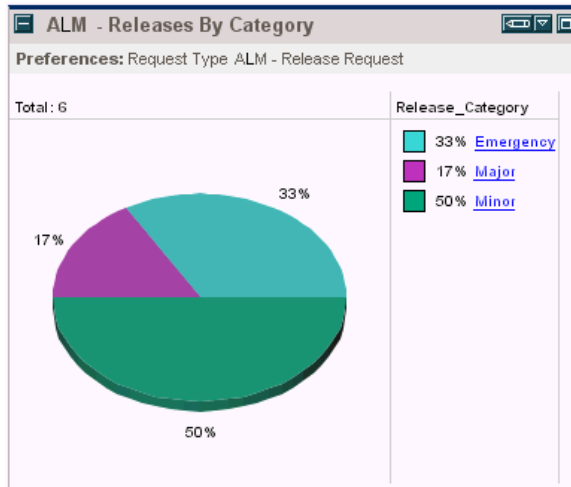
| ALM - Open RFCs  |  |          |                       |             |                   |  |
|--|--|----------|-----------------------|-------------|-------------------|--|
| Preferences: Request Type ALM - Request for Change (RFC) |  |          |                       |             |                   |  |
| Request # Δ  | RFC Summary  | Priority | Reported By           | Category    | Status            |  |
| 30642  | Replace failing Cisco router   | Medium   | 2008-03-29 14:23:11.0 | Significant | In CAB Approval   |  |
| 30643  | Create new order management pipeline report to support sales forecasting | Medium   | 2008-03-29 14:33:00.0 | Significant | In CAB Approval   |  |
| 30645  | Add list of values of new country codes                                  | Low      | 2008-03-29 15:05:43.0 | Minor       | Build             |  |
| 30648  | test   | High     | 2008-03-29 15:57:43.0 | Significant | Build             |  |
| 30649  | Reset the consultant username and passwords.                             | High     | 2008-03-29 16:40:25.0 | Major       | Allocate Priority |  |
| 30650  | Reset the consultant username and passwords.                             | High     | 2008-03-29 16:43:46.0 | Major       | Allocate Priority |  |
| 30651  | Reset the consultant username and passwords.                             | High     | 2008-03-29 16:50:03.0 | Major       | Impact Assessment |  |

# ALM - Releases

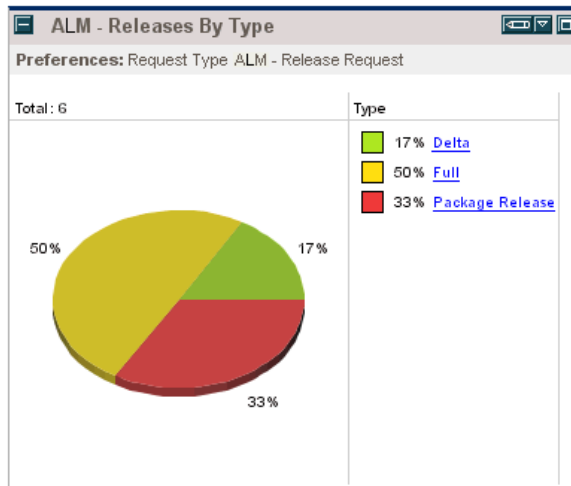
| ALM - Releases |                             |                     |                               |
|----------------|-----------------------------|---------------------|-------------------------------|
| Request # Δ    | Summary                     | Status              | View Impact                   |
| 30031          | testing release information | Planning            | <a href="#">Click to View</a> |
| 30061          | Test release                | Closed - Successful | <a href="#">Click to View</a> |
| 30090          | Test                        | Closed - Successful | <a href="#">Click to View</a> |
| 30125          | RM Test                     | Release Approved    | <a href="#">Click to View</a> |
| 30126          | 33                          | Test                | <a href="#">Click to View</a> |

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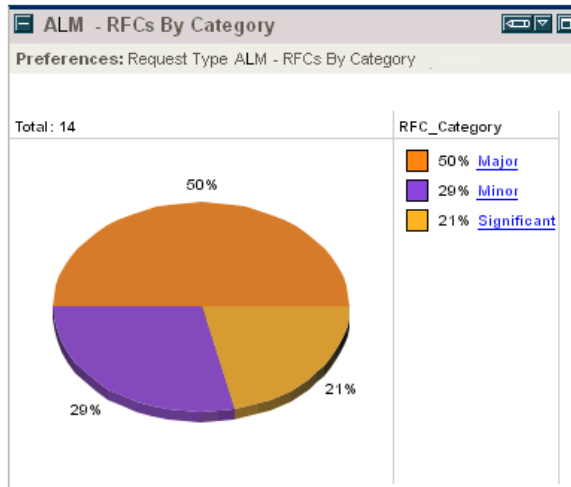
## ALM - Releases By Category



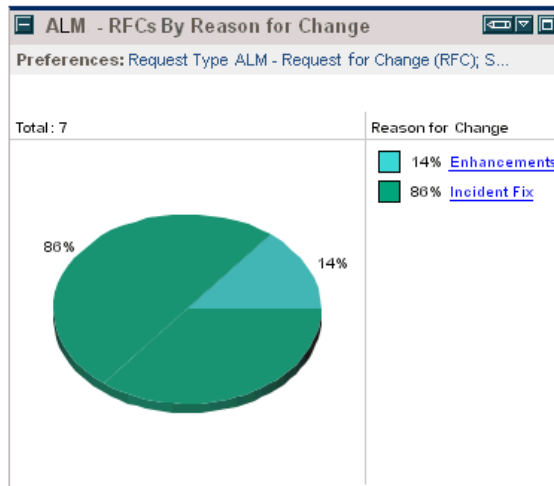
## ALM - Releases By Type



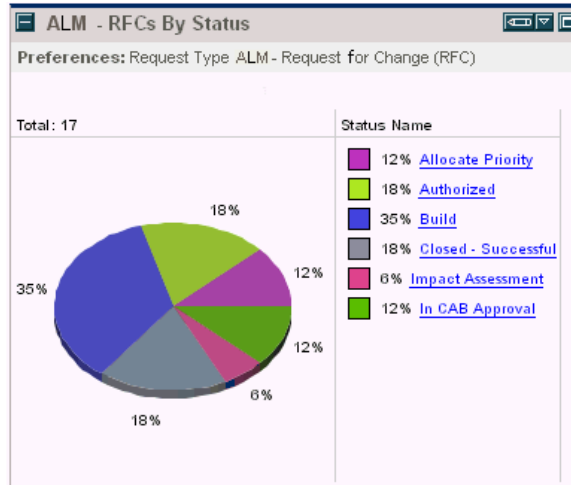
## ALM - RFCs By Category



## ALM - RFCs By Reason for Change



## ALM - RFCs By Status



## ALM - RFCs per Release

ALM - RFCs per Release

Preferences: Request Type: ALM - Request for Change (...)

| Request # Δ | Description  | Priority | Impact |
|-------------|--|----------|--------|
| 30401       | Implement single sign-on to the portal system.                 | High     | Medium |
| 30819       | Investigate wireless options.                                  | Low      | Medium |
| 30953       | Unable to log on to the SAP HR system.                         | High     | High   |
| 30995       | Changes to GUI field area                                      | High     | Medium |
| 31004       | Web Store Column is out of alignment with the rest of the page | High     | Medium |

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## Financial Management Category

### Capitalized Project Breakdown

Capitalized Project Breakdown

| Project Name Δ                  | Project Manager            | Risk | Carrying Value | Total Planned Capital | Planned Cost |
|---------------------------------|----------------------------|------|----------------|-----------------------|--------------|
| ERP Service Pack - Sept 2006    | Joseph Banks               | 0    | \$0.00         | \$21,000.00           | \$44,000.00  |
| IT: Defect process improvements | Teju Krishna, Joseph Banks | 0    | \$0.00         | \$12,000.00           | \$24,000.00  |

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# Program Cost Summary

| Costs from Program: Major Infrastructure Activities |                    |                  |
|---|--------------------|------------------|
| Cost Overview                                       |                    |                  |
|   | Planned            | Actual           |
| Capital   |                    |                  |
| Labor   | \$1,311,120        | \$0              |
| Non-Labor   | \$286,000          | \$0              |
| <b>Total Charge</b>                                 | <b>\$1,597,120</b> | <b>\$0</b>       |
| Operating   |                    |                  |
| Labor   | \$36,360           | \$814,560        |
| Non-Labor   | \$20,000           | \$0              |
| <b>Total Charge</b>                                 | <b>\$56,360</b>    | <b>\$814,560</b> |
| <b>Program Total Charge</b>                         | <b>\$1,653,480</b> | <b>\$814,560</b> |

Costs are up to date as of 2/23/07 02:38 PM PST. Costs are usually recalculated every 60 minutes.

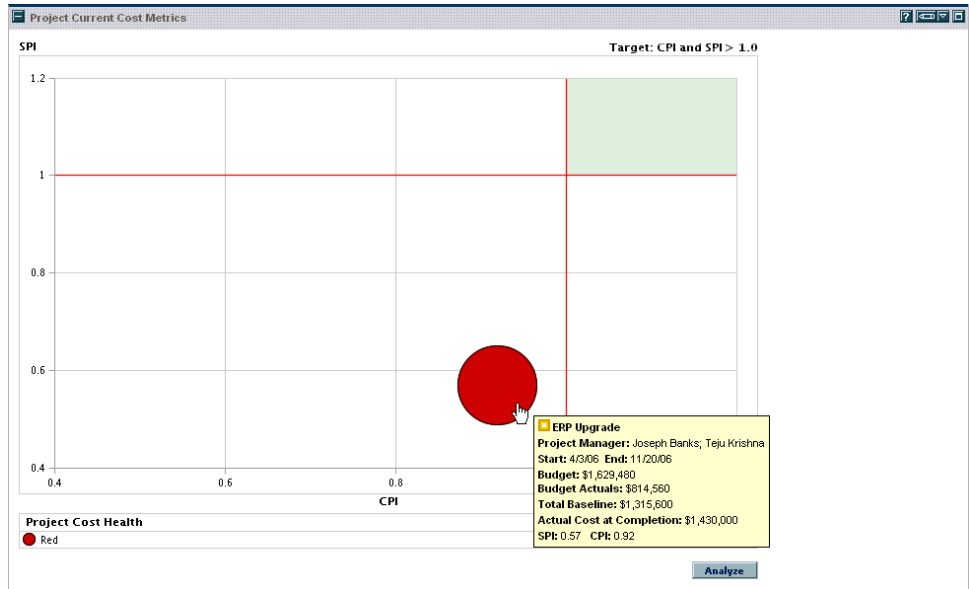
[Earned Value Details](#)

# Project Cost Summary

| Project Cost Health: <span style="color: red;">■</span> Costs from Budget: ERP Upgrade |                       |                                       |
|--|-----------------------|---------------------------------------|
| Cost Overview  |                       |                                       |
|  | Planned               | Actual                                |
| Labor  | \$1,335,480.00        | \$814,560.00                          |
| Non-Labor  | \$294,000.00          | \$0.00                                |
| <b>Total Charge</b>  | <b>\$1,629,480.00</b> | <b>\$814,560.00</b>                   |
| Earned Value Summary   |                       |                                       |
| <b>Planned Value:</b>  | \$1,304,600.00        | <b>Sched Variance:</b> (\$557,920.00) |
| <b>Earned Value:</b>   | \$746,680.00          | <b>Cost Variance:</b> (\$67,880.00)   |
| <b>Actual Cost:</b>  | \$814,560.00          | <b>SPI:</b> 0.57 <b>CPI:</b> 0.92     |

[Earned Value Details](#)

# Project Current Cost Metrics



# Packages Category

## My Packages

| Pkg # Δ | Workflow          | Priority | Description              | Assigned To   | Last Updated | Created By |
|---------|-------------------|----------|--------------------------|---------------|--------------|------------|
| 30007   | DEV > TEST > PROD | Normal   | Patch v3 migration test  | Carolyn Sayer | 3/6/2007     | Admin User |
| 30008   | DEV > TEST > PROD | Normal   |                          | Carolyn Sayer | 9/28/2006    | Admin User |
| 30019   | DEV > TEST > PROD | Normal   | Patch v4a migration test | Carolyn Sayer | 3/6/2007     | Admin User |
| 30029   | DEV > TEST > PROD | Normal   | Upgrade for release 7.0b | Holly Haywood | 3/6/2007     | Admin User |
| 30032   | DEV > TEST > PROD | Normal   | Patch v3 migration test  | Carolyn Sayer | 3/6/2007     | Admin User |

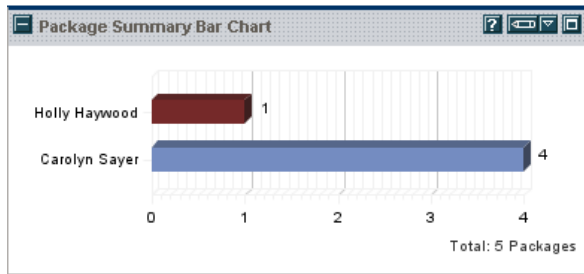
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# Package List

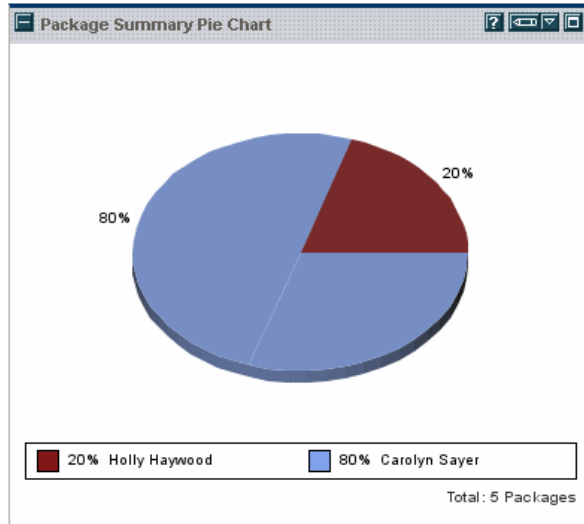
| References                                      | Assigned User | Details                      | Status | % Complete | Description                                 | Relationship            |
|---|---------------|------------------------------|--------|------------|---|-------------------------|
| <b>Package# 30007 - Patch v3 migration test</b> |               |                              |        |            |   |                         |
| Pkg# 30032                                      | Carolyn Sayer | DEV > TEST > PROD            | New    | 0%         | Patch v3 migration test                     | Related to this Package |
| Req# 30330                                      |               | PFM - Proposal               | New    | 0%         | Upgrade DB version                          | Related to this Package |
| Tsk:ERP Service Pack - Sept 2006                |               | ERP Service Pack - Sept 2006 | Active |            |   | Related to this Package |
| Tsk:ERP Service Pack - Sept 2006                | Joseph Banks  | ERP Service Pack - Sept 2006 | Active |            |   | Related to this Package |
| <b>Package# 30008</b>                           |               |                              |        |            |   |                         |
| Req# 30121                                      | Finn Gill     | DEM - Application Bug        | New    | 0%         | Inventory counts do not transaction details | Related to this Package |

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# Package Summary Bar Chart



## Package Summary Pie Chart

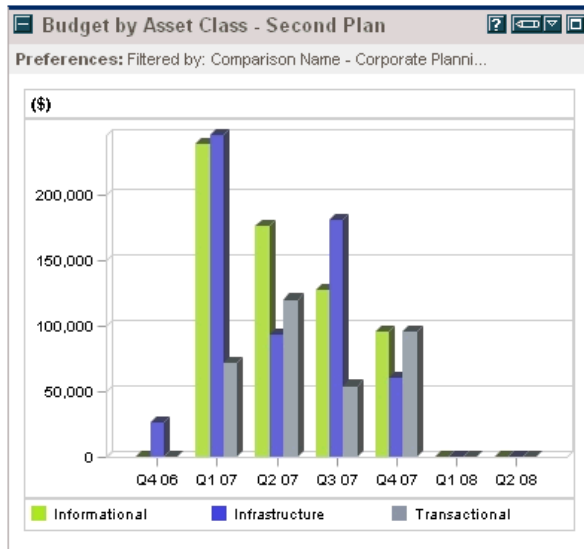
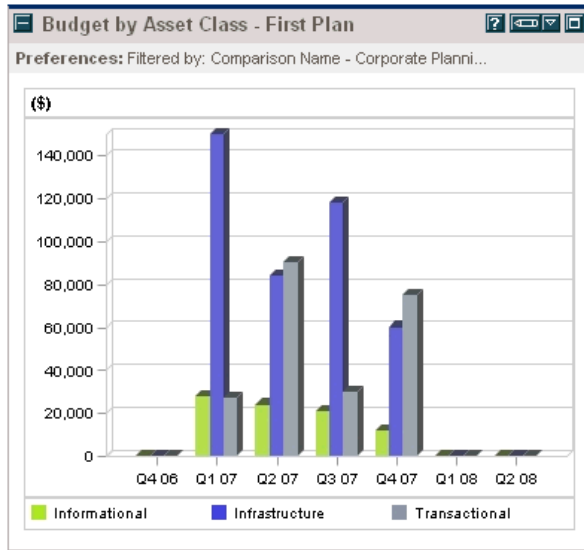


## Portfolio Management Category

### Budget by Asset Class

- ▶ This example shows two Budget by Asset Class portlets that compare two scenarios from a scenario comparison.



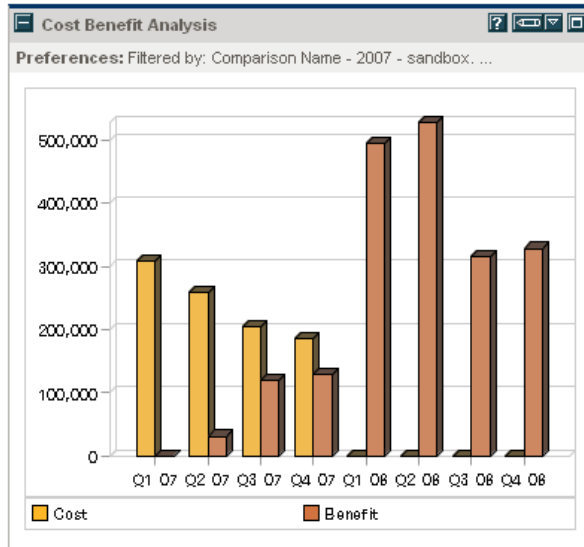


# Capitalized Project Breakdown

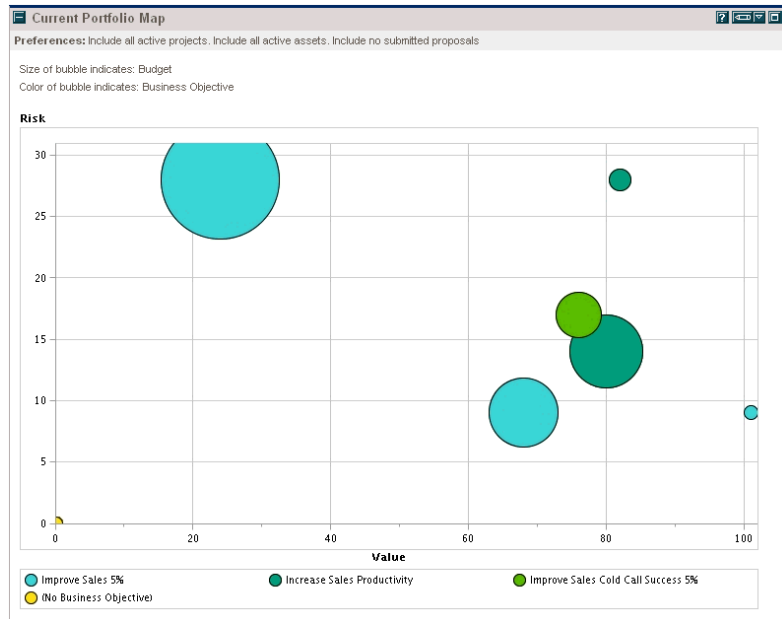
| Project Name                    | Project Manager            | Risk | Carrying Value | Total Planned Capital | Planned Cost |
|---------------------------------|----------------------------|------|----------------|-----------------------|--------------|
| ERP Service Pack - Sept 2006    | Joseph Banks               | 0    | \$0.00         | \$21,000.00           | \$44,000.00  |
| IT: Defect process improvements | Teju Krishna, Joseph Banks | 0    | \$0.00         | \$12,000.00           | \$24,000.00  |

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# Cost Benefit Analysis



# Current Portfolio Map



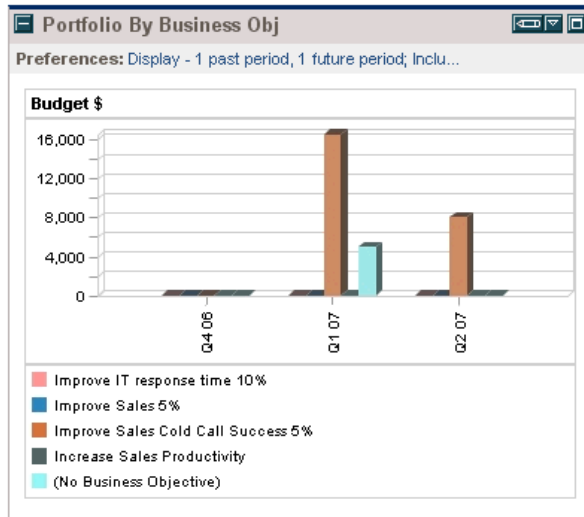
## Portfolio By Category

This example of a Portfolio By Category portlet is a Portfolio By Business Obj portlet, which displays business objectives.

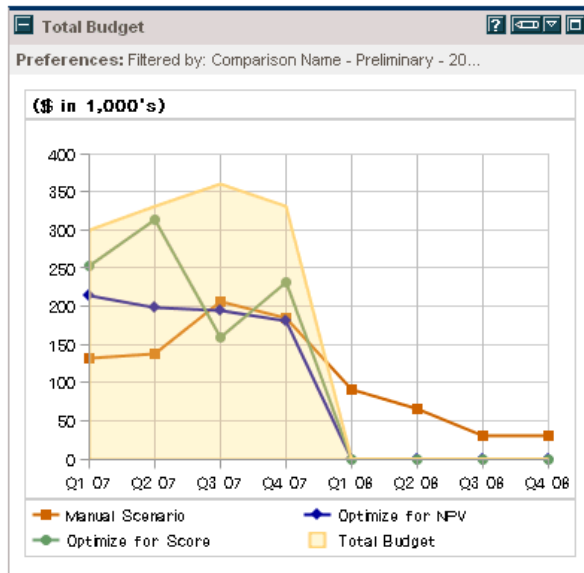


Other Portfolio by Category portlets are:

- Portfolio By Project Class
- Portfolio By Asset Class



## Total Budget



# Program Management Category

## Issue List

| Project Δ   | Issue # | Priority | Escalation Level | Status | Description   |
|-------------|---------|----------|------------------|--------|---|
| ERP Upgrade | 30062   | Normal   | Project          | Closed | development servers have not arrived and developers need .. |
| ERP Upgrade | 30150   | Critical | Project          | New    | Company shutdown directly impacts delivery timeline         |
| ERP Upgrade | 30151   | Normal   | Project          | New    | We need another cube for contractors expected next month    |

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## Program Cost Summary

| Costs from Program: Major Infrastructure Activities |                    |                  |
|---|--------------------|------------------|
| Cost Overview                                       |                    |                  |
| Capital   | Planned            | Actual           |
| Labor   | \$1,311,120        | \$0              |
| Non-Labor   | \$286,000          | \$0              |
| <b>Total Charge</b>                                 | <b>\$1,597,120</b> | <b>\$0</b>       |
| Operating   | Planned            | Actual           |
| Labor   | \$36,360           | \$814,560        |
| Non-Labor   | \$20,000           | \$0              |
| <b>Total Charge</b>                                 | <b>\$56,360</b>    | <b>\$814,560</b> |
| <b>Program Total Charge</b>                         | <b>\$1,653,480</b> | <b>\$814,560</b> |

Costs are up to date as of 2/23/07 02:38 PM PST. Costs are usually recalculated every 60 minutes.

[Earned Value Details](#)

## Program List

| Program Name                    | Relative Priority | Program Manager | Program State | Issues | Risks | Scope Changes |
|---------------------------------|-------------------|-----------------|---------------|--------|-------|---------------|
| Enterprise Business Apps        |                   | Carolyn Sayer   | Active        | 5      | 2     | 1             |
| Major Infrastructure Activities |                   | Carolyn Sayer   | New           | 5      | 3     | 1             |

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## Program Project List

| Program Project List                                     |                 |            |
|--|-----------------|------------|
| Project Name Δ   | Project Manager | Project Ho |
| <input type="checkbox"/> Change Actualizat...            | azumwalt        | 30210      |
| <input checked="" type="checkbox"/> ERP Upgrade          | jbanks,krishna  | 30018      |
| <input checked="" type="checkbox"/> IT: Defect proces... | jbanks,krishna  | 30125      |
| <input checked="" type="checkbox"/> Internal Web Site... | jbanks          | 30016      |
| <input checked="" type="checkbox"/> Internal Web Site... | jbanks          | 30015      |

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## Program Risk List

| Program Risk List                   |        |                 |              |        |  |
|-------------------------------------|--------|-----------------|--------------|--------|--|
| Project Δ                           | Risk # | Probability     | Impact Level | Status | Description  |
| ERP Upgrade                         | 30064  | Medium [11-25%] | Level 1      | New    | Resource drain due to KTLO activities              |
| ERP Upgrade                         | 30065  | Medium [11-25%] | Level 1      | New    | Org change management for the project is signif... |
| IT: Defect process improvements     | 30221  | Medium [11-25%] | Level 2      | New    | All departments must submit complete requirements  |
| IT: Defect process improvements     | 30247  | Medium [11-25%] | Level 1      | Closed | Assigned developers wont be available during s...  |
| Internal Web Site Rollout - finance | 30219  | Medium [11-25%] | Level 2      | Closed | Limited time to research archived data.            |

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## Program Scope Change List

| Program Scope Change List       |                |          |                      |        |  |
|---------------------------------|----------------|----------|----------------------|--------|--|
| Project Δ                       | Scope Change # | Severity | Change Request Level | Status | Description  |
| Change Actualization Initiative | 30245          | Critical | Level 1              | New    | Move initiative back by one month to allow for ... |
| ERP Upgrade                     | 30066          | High     | Level 1              | New    | Automate Revenue recognition deferral timing ba... |

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# Project Management Category

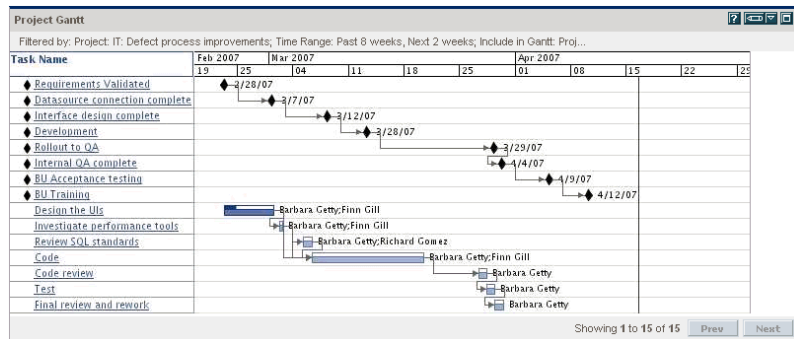
## My Tasks

| Actual Start   | Actual Finish | Actual Effort (hrs) | % Complete |
|--|---------------|---------------------|------------|
| Design Approval Scheduled: 9/21/06 - 9/22/06 (2 days)    |               |                     |            |
| 9/21/06  |               | 11.00               | 70         |
| Write Design Specs Scheduled: 9/18/06 - 9/20/06 (3 days) |               |                     |            |
| 9/18/06  |               | 21.00               | 90         |

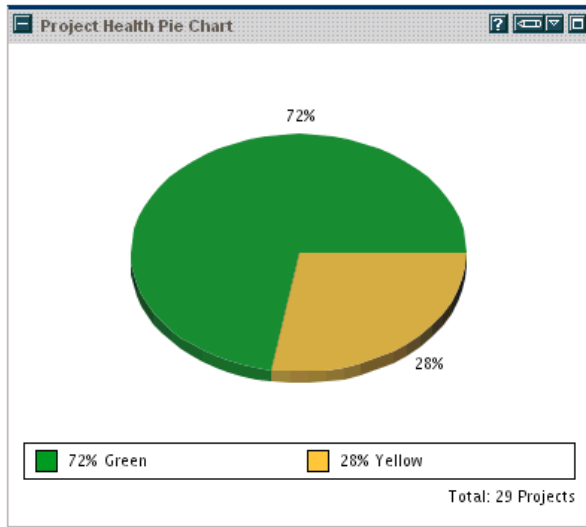
## Program Project List

| Project Name         | Project Manager | Project Ho |
|----------------------|-----------------|------------|
| Change Actualizat... | azumwalt        | 30210      |
| ERP Upgrade          | jbanks;krishna  | 30018      |
| IT: Defect proces... | jbanks;krishna  | 30125      |
| Internal Web Site... | jbanks          | 30016      |
| Internal Web Site... | jbanks          | 30015      |

## Project Gantt



# Project Health Pie Chart



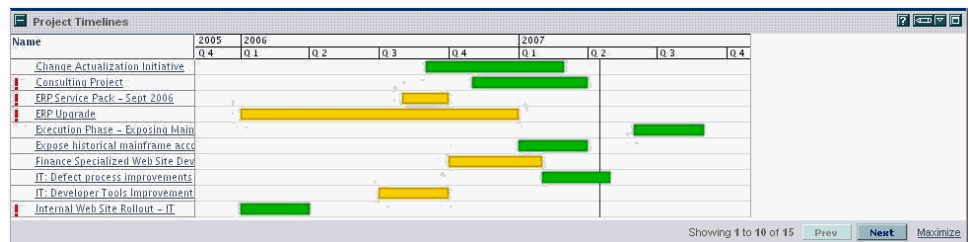


# Project List

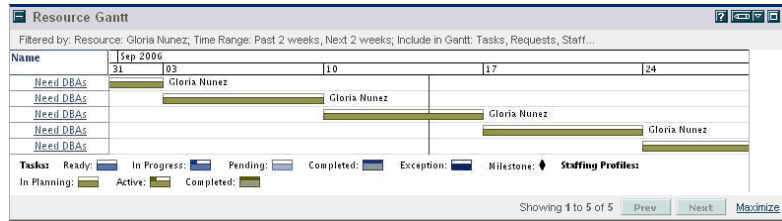
| Name Δ  | Project No | Work Plan % Complete | Status                      | Planned Start | Planned Finish | Project Manager            |
|---|------------|----------------------|-----------------------------|---------------|----------------|----------------------------|
| Apple Proj  | 30224      | 20%                  | Active                      | Jun 1, 2006   | Jul 31, 2007   | Teju Krishna               |
| Consulting Project                                | 30187      | 0%                   | Assign Project Manager      | Nov 1, 2006   | Mar 31, 2007   | Barbara Getty              |
| ERP Service Pack - Sept 2006                      | 30091      | 46%                  | Business Readiness Sign-Off | Aug 1, 2006   | Sep 30, 2006   | Joseph Banks               |
| ERP Upgrade                                       | 30018      | 65%                  | In QA                       | Jan 1, 2006   | Dec 31, 2006   | Joseph Banks; Teju Krishna |
| Execution Phase - Exposing Mainframe Account Data | 30127      | 17%                  | Design                      | Jun 1, 2007   | Aug 31, 2007   | Joseph Banks               |
| Expose historical mainframe account information   | 30124      | 0%                   | Business Readiness Sign-Off | Jan 1, 2007   | Mar 31, 2007   | Joseph Banks               |
| Finance Specialized Web Site Development          | 30090      | 0%                   | Assign Project Manager      | Oct 1, 2006   | Jan 31, 2007   | Teju Krishna               |
| Internal Web Site Rollout - finance               | 30015      | 69%                  | Business Readiness Sign-Off | Jun 1, 2006   | Aug 31, 2006   | Joseph Banks               |
| Internal Web Site Rollout - IT                    | 30016      | 0%                   | Deploy                      | Jan 1, 2006   | Mar 31, 2006   | Joseph Banks               |
| Internal Web Site Rollout - sales                 | 30014      | 0%                   | Assign Project Manager      | Mar 1, 2007   | Jul 31, 2007   | Joseph Banks               |

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# Project Timelines



# Resource Gantt



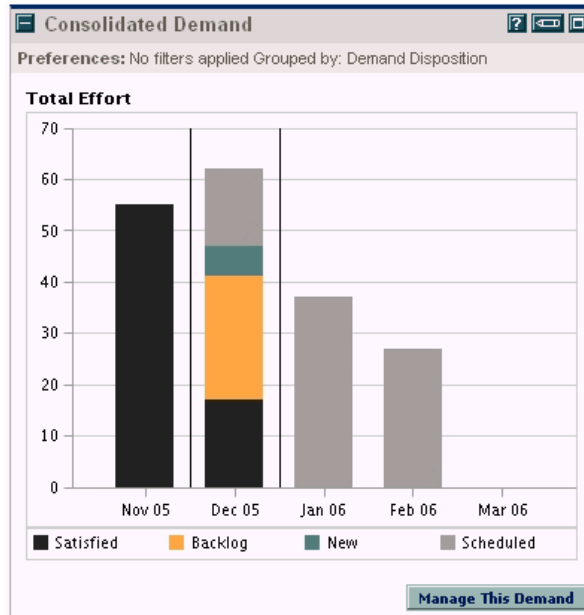
# Summary Task List

| Name                          | % Complete | Status | Sched Start  | Sched Finish |
|-------------------------------|------------|--------|--------------|--------------|
| Conversions Track             | 93%        | Active | Apr 17, 2006 | May 19, 2006 |
| Interfaces Track              | 87%        | Active | Apr 17, 2006 | May 19, 2006 |
| Acceptance Testing            | 0%         | Active | Aug 30, 2006 | Sep 11, 2006 |
| Acceptance Testing            | 0%         | Active | Dec 12, 2006 | Dec 21, 2006 |
| Acceptance, Training, Rollout | 0%         | Active | Jul 10, 2007 | Jul 13, 2007 |

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# Requests Category

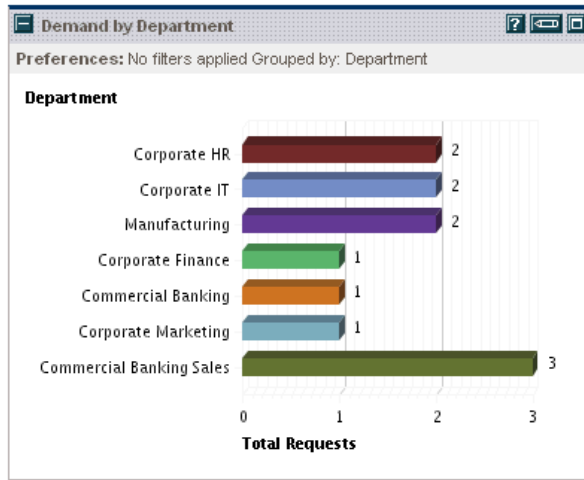
## Consolidated Demand



## Demand by Category



This example of a Demand by Category portlet is a Demand by Department portlet. The portlet preferences include many other options for grouping and displaying demand.



## Demand List

| Demand List  |                               |   |        |          |                     |   |
|--|-------------------------------|---|--------|----------|---------------------|---|
| Preferences: Demand Set Name: Default Demand Set, Time Period: Month |                               |   |        |          |                     |   |
| Request Number<br>Δ  | Request Type<br>Name          | Description   | Status | Priority | Assigned To<br>User | Assigned To<br>Group                    |
| 30121  | DEM - Application Bug         | inventory counts do not transaction details                       | New    | Critical | fgill               |   |
| 30122  | DEM - Application Bug         | Cycle count screen throws error                                   | New    | Normal   | fgill               |   |
| 30243  | DEM - Application Bug         | Loan details unavailable in IE.                                   | New    | High     | bholbrook           | ITG Project Manager                     |
| 30244  | DEM - Application Bug         | Need to upgrade to latest available version.                      | New    | High     | ngiddings           |   |
| 30246  | DEM - Application Enhancement | Add a module that can be used to manage employee buy-out options. | New    | High     | lfranklin           | IT Development Team Leads               |
| 30248  | DEM - Initiative              | Customer site visits  | New    | High     | bsolomon            | IT Development Team Leads               |
| 30249  | DEM - Application Bug         | Laptop DEMO installation is broken                                | New    | High     | lfranklin           | IT Development Team Leads               |
| 30250  | DEM - Application Bug         | Report generation is broken                                       | New    | Critical | lbgreer             | IT Development Team Leads               |
| 30251  | DEM - Application Enhancement | Show vesting options to users                                     | New    | High     | cwu                 | ITG Resource Manager                    |
| 30252  | DEM - Application Bug         | Customer sales Web site links to Demos broken                     | New    | Normal   |                     |   |
| 30253  | DEM - Application Bug         | inventory counts do not transaction details                       | New    | Normal   | fgill               |   |
| 30254  | DEM - Application Bug         | Cannot access Euro email groups                                   | New    | Normal   |                     |   |
| 30256  | DEM - Initiative              | This initiative addresses Phase 2 of the overhaul.                | New    | Normal   | csayer              | ITG Deployment Management Administrator |

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## Issue List

| Project Δ   | Issue # | Priority | Escalation Level | Status | Description   |
|-------------|---------|----------|------------------|--------|---|
| ERP Upgrade | 30062   | Normal   | Project          | Closed | development servers have not arrived and developers need. |
| ERP Upgrade | 30150   | Critical | Project          | New    | Company shutdown directly impacts delivery timeline       |
| ERP Upgrade | 30151   | Normal   | Project          | New    | We need another cube for contractors expected next month  |

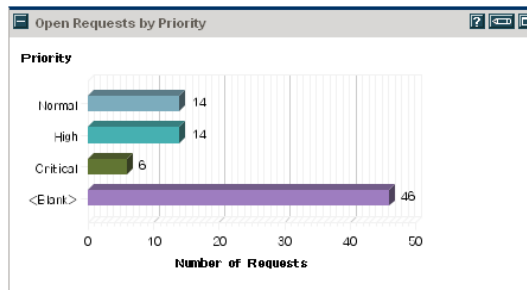
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## My Requests

| Req # Δ | Req Type       | Description                              | Status      | Assigned To  | Priority | Created By   |
|---------|----------------|--|-------------|--------------|----------|--------------|
| 30017   | PFM - Proposal | Web site rollout to Facilities           | ITSC Review |              |          | Joseph Banks |
| 30030   | Project Issue  | Losing our Oracle Apps expert QA person  | Open        | Joseph Banks | Critical | Joseph Banks |
| 30150   | Project Issue  | Company shutdown directly impacts del... | New         |              | Critical | Joseph Banks |
| 30151   | Project Issue  | We need another cube for contractors ... | New         |              | Normal   | Joseph Banks |

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## Open Requests by Priority



## Program Risk List

| Project Δ                           | Risk # | Probability     | Impact Level | Status | Description  |
|-------------------------------------|--------|-----------------|--------------|--------|--|
| ERP Upgrade                         | 30064  | Medium [11-25%] | Level 1      | New    | Resource drain due to KTLO activities              |
| ERP Upgrade                         | 30065  | Medium [11-25%] | Level 1      | New    | Org change management for the project is signif... |
| IT: Defect process improvements     | 30221  | Medium [11-25%] | Level 2      | New    | All departments must submit complete requirements  |
| IT: Defect process improvements     | 30247  | Medium [11-25%] | Level 1      | Closed | Assigned developers wont be available during s...  |
| Internal Web Site Rollout - finance | 30219  | Medium [11-25%] | Level 2      | Closed | Limited time to research archived data.            |

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## Program Scope Change List

| Project Δ                       | Scope Change # | Severity | Change Request Level | Status | Description  |
|---------------------------------|----------------|----------|----------------------|--------|--|
| Change Actualization Initiative | 30245          | Critical | Level 1              | New    | Move initiative back by one month to allow for ... |
| ERP Upgrade                     | 30066          | High     | Level 1              | New    | Automate Revenue recognition deferral timing ba... |

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## Request List

| Req # ▾ | Request Type  | Description   | Status | Assigned To      | Priority | Created By   |
|---------|---------------|---|--------|------------------|----------|--------------|
| 30242   | Project Issue | No verification that upgrade requirements are in place. Need at least one resource for 5 working... | New    | Finn Gill        | High     | Admin User   |
| 30218   | Project Issue | Usability testing   | New    | Bridget Holbrook | Normal   | Admin User   |
| 30217   | Project Issue | Rewrite and distribute specifications   | New    | Barbara Getty    | Normal   | Admin User   |
| 30151   | Project Issue | We need another cube for contractors expected next month  | New    |                  | Normal   | Joseph Banks |
| 30150   | Project Issue | Company shutdown directly impacts delivery timeline   | New    |                  | Critical | Joseph Banks |

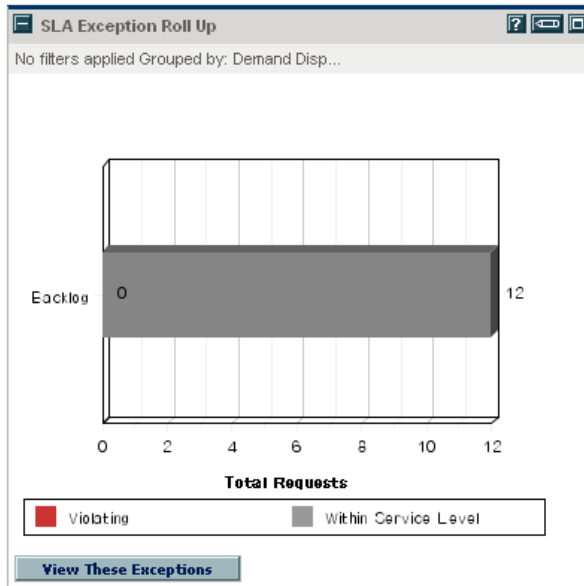
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# Request Summary

| Priority | # of Reqs |
|----------|-----------|
| Normal   | 11        |
| High     | 9         |
| Critical | 6         |
| <Blank>  | 29        |

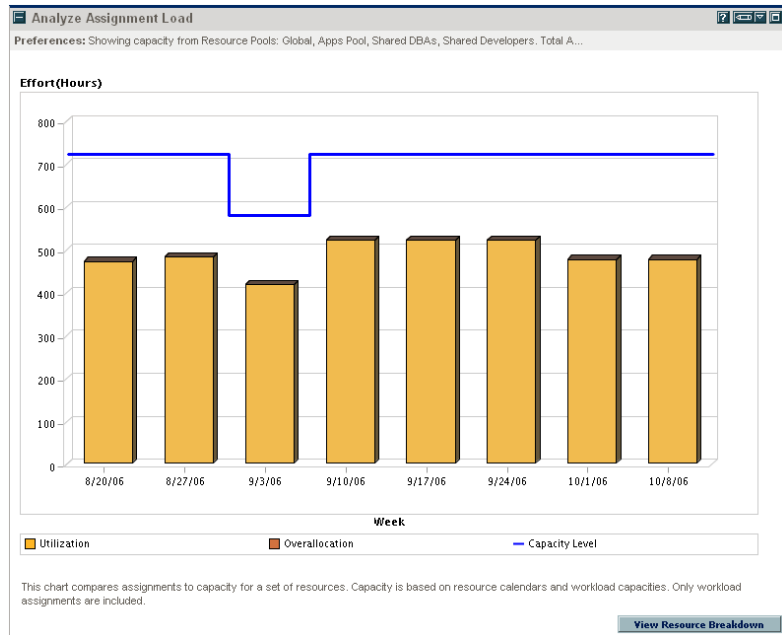
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# SLA Exception Roll Up



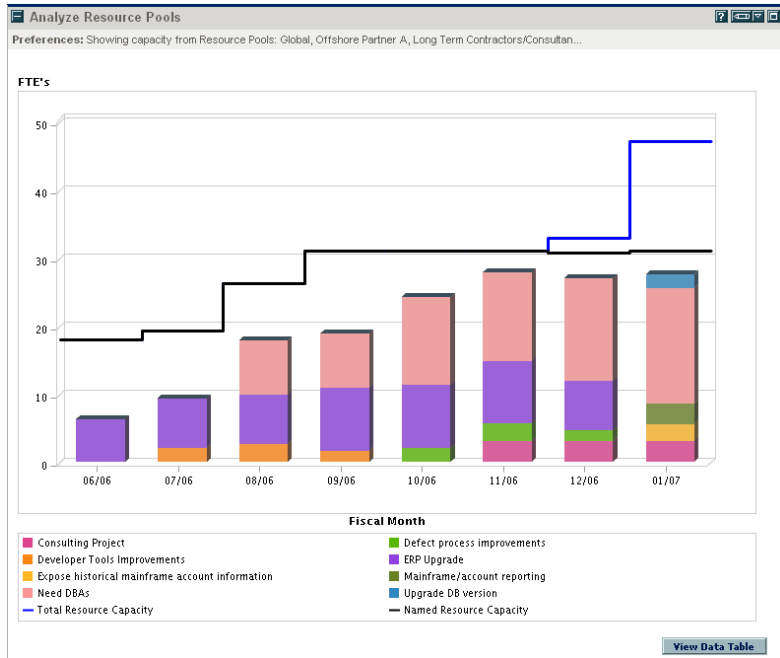
# Resource Management Category

## Analyze Assignment Load





# Analyze Resource Pools



# Resource Pool List

**Resource Pool List**

Preferences:

| Resource Pool Δ             | Resource Pool is for         | Pool Manager                  |
|-----------------------------|------------------------------|-------------------------------|
| Apps Pool                   |                              | Bridget Holtbrook             |
| Global                      |                              | Admin User, Bridget Holtbrook |
| Long Term Contractors/Co... |                              | Bridget Holtbrook             |
| Offshore Partner A          | Org Unit: Offshore Partner A | Pramod Manon                  |
| QA Engineers                |                              | Bridget Holtbrook             |

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# Resource Request Portlet

Resource Request Portlet

Preferences: Staffing Profile: Internal Web Site Rollout - IT, Need DBAs, Upgrade DB version, Web site ...

| Staffing Profile Δ             | Resource Pool     | Position         | Position Status | Response Heeded By | Start Date of Unmet Demand | End Date of Unmet Demand | Total Unmet Hours |
|--------------------------------|-------------------|------------------|-----------------|--------------------|----------------------------|--------------------------|-------------------|
| Internal Web Site Rollout - IT | Shared Developers | Senior Developer | New             |                    | 1/3/06                     | 3/31/06                  | 1,260             |
| Need DBAs                      | Shared DBAs       | DBA              | Requested       | 8/22/06            | 8/1/06                     | 6/29/07                  | 8,752             |
| Need DBAs                      | Shared DBAs       | Developer 1      | Requested       | 8/22/06            | 10/2/06                    | 3/30/07                  | 5,040             |
| Upgrade DB version             | Shared Developers | DBA              | New             |                    | 1/2/07                     | 12/31/07                 | 4,064             |
| Web site rollout to Facilities | Shared Developers | Senior Developer | New             |                    | 6/1/07                     | 8/31/07                  | 1,308             |

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# Staffing Profile List

Staffing Profile List

Preferences:

| Staffing Profile                                  | Staffing Profile is for        | Workload Category | Manager                    | Status Δ | Start | Finish |
|---|--------------------------------|-------------------|----------------------------|----------|-------|--------|
| Execution Phase - Exposing Mainframe Account Data | Project: Execution Phase - ... |                   | Joseph Banks               | Active   | Ju... | Au...  |
| Expose historical mainframe account information   | Project: Expose historical ... |                   | Joseph Banks               | Active   | Ja... | Ma...  |
| Developer Tools Improvements                      | Project: IT: Developer Tool... |                   | Joseph Banks               | Active   | Ju... | Se...  |
| ERP Upgrade                                       | Project: ERP Upgrade           |                   | Joseph Banks; Teju Krishna | Active   | Ja... | De...  |
| ERP Upgrade 081606                                | Project: ERP Upgrade           |                   | Joseph Banks; Teju Krishna | Baseline | Ja... | De...  |

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# Time Management Category

## Approve Time Sheets

Approve Time Sheets

Preferences: Previous Time Periods to Show: 1; Time Sheet Line Status: Submitted;

| Resource ▾                              | Time Period - Time Sheet # | Status    | Manager       | Hours to Approve | Total Hours | Approvable Line Costs |
|---|----------------------------|-----------|---------------|------------------|-------------|-----------------------|
| <input type="checkbox"/> Marjorie Olive | 4/1/08 - 4/15/08 - 1       | Submitted | Bruce Solomon | 72               | 88          | \$7,200.00            |
| <input type="checkbox"/> David Jones    | 4/1/08 - 4/15/08 - 1       | Submitted |               | 88               | 88          | \$8,360.00            |

Check all [Approve](#) [Reject](#)

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# My Tasks

| My Tasks   |               |                       |            |                  |
|--|---------------|-----------------------|------------|------------------|
| Preferences: Tasks starting within 14 days; Tasks ready for my action;                 |               |                       |            |                  |
| Use Time Sheet: David Jones - 9/16/06 - 9/30/06  |               | Edit Effort Breakdown |            | Go To Time Sheet |
| Actual Start   | Actual Finish | Actual Effort (hrs)   | % Complete |                  |
| <b>Design Approval</b> Scheduled: 9/21/06 - 9/22/06 (2 days)                           |               |                       |            |                  |
| 9/21/06  |               | 11.00                 | 70         |                  |
| <b>Write Design Specs</b> Scheduled: 9/18/06 - 9/20/06 (3 days)                        |               |                       |            |                  |
| 9/18/06  |               | 21.00                 | 90         |                  |
| Reset  |               | Save                  |            |                  |
| Showing 1 to 2 of 2 <a href="#">Prev</a> <a href="#">Next</a> <a href="#">Maximize</a> |               |                       |            |                  |

# My Time Sheets

| My Time Sheets   |                                |             |
|--|--------------------------------|-------------|
| Time Sheet # - Period  | Description                    | Status      |
| 1 - 4/1/06 - 4/15/06   | David Jones - 4/1/06 - 4/15/06 | Unsubmitted |
| <a href="#">Create New Time Sheet</a>  |                                |             |
| Showing 1 to 1 of 1 <a href="#">Prev</a> <a href="#">Next</a> <a href="#">Maximize</a> |                                |             |

# My Work Items

| My Work Items  |             |           |             |              |                      |                      |                   |
|--|-------------|-----------|-------------|--------------|----------------------|----------------------|-------------------|
| Item Type  | Item Set    | Work Item | Description | Period Type  | Current Period (Hrs) | Current Budget (Hrs) | All Periods (Hrs) |
| Misc   | Misc. Items | Meetings  | Meetings    | Semi-Monthly | 3                    |                      | 3                 |
| Request  | PFM - Asset | 30034     |             | Semi-Monthly | 77                   |                      | 77                |
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## 4 HP-Supplied Request Types

The following table lists the request types provided as part of PPM Center. Availability depends on having the applicable licenses and products.

In the table, the subheadings are alphabetized categories, and the request types are alphabetized within each category. The table indicates which request types are available in two categories, and such request types are described in more detail in the first of the two categories.



To edit any request type, you must have the Demand Mgmt: Edit Request Types access grant.

|  | Request Type Name                                     | Description   |
|--|---|---|
| <b>Application Lifecycle Management (ALM) category</b> |   |   |
| 1  | ALM - Defect Template with Quality Center Integration | Request used by ALM in conjunction with the ALM - Defect Template with Quality Center Integration workflow to implement integration between PPM Center and HP Quality Center. |
| 2  | ALM - Release Management                              | Request used by ALM in conjunction with the ALM - Release Request workflow to address releases in a manner consistent with the ITIL Release Management process.               |
| 3  | ALM - Request For Change (RFC)                        | Request used by ALM in conjunction with the ALM - Request For Change workflow to address requests in a manner consistent with the ITIL Change Management process.             |

|                                | Request Type Name             | Description   |
|--------------------------------|-------------------------------|---|
| <b>Best Practices category</b> |                               |   |
| 4                              | DEM - Application Bug         | Request for reporting problems in current IT applications.  |
| 5                              | DEM - Application Enhancement | Request for new functionality in current IT applications.   |
| 6                              | DEM - Database Refresh        | Request for refreshing the database for all IT operations applications in the testing phase. Standard IT operations service levels apply.   |
| 7                              | DEM - Initiative              | Request for key projects for future quarters.   |
| 8                              | PFM - Asset                   | Request to create an asset, such as a production application, resulting from completion of a project in the current portfolio.<br>Also available for the Portfolio Management category. |
| 9                              | PFM - Project                 | Request to start an approved project (after its approval as a proposal) in the current portfolio.<br>Also available for the Portfolio Management category.                              |
| 10                             | PFM - Proposal                | Request to propose a new project to be approved and added to the portfolio.<br>Also available for the Portfolio Management category.  |
| 11                             | Program Issue                 | Request for logging program issues.   |
| 12                             | Project Issue                 | Request for logging a project issue.  |
| 13                             | Project Risk                  | Request for adding project risk information.  |
| 14                             | Project Scope Change Request  | Request for a project scope change.   |
| <b>Foundation category</b>     |                               |   |
| 15                             | Bug                           | Request for logging a bug.  |

|                                      | <b>Request Type Name</b> | <b>Description</b>  |
|--------------------------------------|--------------------------|---|
| 16                                   | Enhancement              | Request for an enhancement.   |
| 17                                   | Generic Request          | Request for general purpose request tracking.                                 |
| 18                                   | Project Details          | Request for adding project details.   |
| <b>Portfolio Management category</b> |                          |   |
| 19                                   | PFM - Asset              | See <a href="#">PFM - Asset on page 70</a> in the Best Practices category.    |
| 20                                   | PFM - Project            | See <a href="#">PFM - Project on page 70</a> in the Best Practices category.  |
| 21                                   | PFM - Proposal           | See <a href="#">PFM - Proposal on page 70</a> in the Best Practices category. |





# 5 HP-Supplied Workflows

The following table lists the workflows provided as part of PPM Center. Availability depends on having the applicable licenses and products.

In the table, the subheadings are alphabetized categories, and the workflows are alphabetized within each category. The table indicates which workflows are available in two categories.



To edit any workflow, you must have the Config: Edit Workflows access grant.

|  | Workflow Name   | Description   |
|--|---|---|
| <b>Application Lifecycle Management (ALM) category</b> |   |   |
| 1  | ALM - Change Migration                                | Workflow to migrate changes from the DEV environment to the TEST environment and from the TEST environment to the LIVE environment.           |
| 2  | ALM - Defect Template with Quality Center Integration | Workflow that includes execution steps to create a defect or requirement in Quality Center when PPM Center and Quality Center are integrated. |
| 3  | ALM - Release Distribution                            | Workflow used to control distribution among environments of a release that consolidated multiple changes.                                     |

|   | <b>Workflow Name</b>     | <b>Description</b>  |
|---|--------------------------|---|
| 4 | ALM - Release Request    | Workflow used to control the sequence of approvals, decisions, and actions that a release request follows over its lifecycle, including initial planning, creation of the release, aggregation of the packages for the requests for change (RFCs) into the release, and automated deployment of all the packages into TEST and LIVE environments. |
| 5 | ALM - Request For Change | Workflow used to control the sequence of approvals, decisions, and actions by which an RFC is processed over its lifecycle.   |

#### **Best Practices category**

|    |                                   |   |
|----|-----------------------------------|---|
| 6  | DEM - Bug Request                 | Workflow to enable mature bug fix process.                                      |
| 7  | DEM - Database Refresh            | Workflow to refresh development or QA databases.                                |
| 8  | DEM - Enhancement Request Process | Workflow to request mature enhancement process.                                 |
| 9  | DEM - Project Initiative Process  | Workflow to initiate approval for an IT project.                                |
| 10 | Issue Management Process          | Workflow for managing issues.   |
| 11 | PFM - Asset                       | Workflow for asset.<br>Also available for the Portfolio Management category.    |
| 12 | PFM - Project                     | Workflow for project.<br>Also available for the Portfolio Management category.  |
| 13 | PFM - Proposal                    | Workflow for proposal.<br>Also available for the Portfolio Management category. |
| 14 | Risk Management Process           | Workflow for risk management.   |

|                                      | <b>Workflow Name</b>          | <b>Description</b>  |
|--------------------------------------|-------------------------------|---|
| 15                                   | Scope Change Request Process  | Workflow for scoping change requests.   |
| <b>Foundation category</b>           |                               |   |
| 16                                   | Bug Request Type              | Workflow for bug fix request type.  |
| 17                                   | Dev -> Test -> Multiple Prods | Workflow for migrating code from development to multiple production environments. |
| 18                                   | Dev -> Test -> Prod           | Workflow for migrating code from development through production.                  |
| 19                                   | Project Process               | Workflow for project management.  |
| <b>Portfolio Management category</b> |                               |   |
| 20                                   | PFM - Asset                   | Workflow for asset.<br>Also available for the Best Practices category.            |
| 21                                   | PFM - Project                 | Workflow for project.<br>Also available for the Best Practices category.          |
| 22                                   | PFM - Proposal                | Workflow for proposal.<br>Also available for the Best Practices category.         |

