

CA Clarity™ PPM

Portlet Reference Guide

Release 14.1.00



This Documentation, which includes embedded help systems and electronically distributed materials, (hereinafter referred to as the "Documentation") is for your informational purposes only and is subject to change or withdrawal by CA at any time. This Documentation is proprietary information of CA and may not be copied, transferred, reproduced, disclosed, modified or duplicated, in whole or in part, without the prior written consent of CA.

If you are a licensed user of the software product(s) addressed in the Documentation, you may print or otherwise make available a reasonable number of copies of the Documentation for internal use by you and your employees in connection with that software, provided that all CA copyright notices and legends are affixed to each reproduced copy.

The right to print or otherwise make available copies of the Documentation is limited to the period during which the applicable license for such software remains in full force and effect. Should the license terminate for any reason, it is your responsibility to certify in writing to CA that all copies and partial copies of the Documentation have been returned to CA or destroyed.

TO THE EXTENT PERMITTED BY APPLICABLE LAW, CA PROVIDES THIS DOCUMENTATION "AS IS" WITHOUT WARRANTY OF ANY KIND, INCLUDING WITHOUT LIMITATION, ANY IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NONINFRINGEMENT. IN NO EVENT WILL CA BE LIABLE TO YOU OR ANY THIRD PARTY FOR ANY LOSS OR DAMAGE, DIRECT OR INDIRECT, FROM THE USE OF THIS DOCUMENTATION, INCLUDING WITHOUT LIMITATION, LOST PROFITS, LOST INVESTMENT, BUSINESS INTERRUPTION, GOODWILL, OR LOST DATA, EVEN IF CA IS EXPRESSLY ADVISED IN ADVANCE OF THE POSSIBILITY OF SUCH LOSS OR DAMAGE.

The use of any software product referenced in the Documentation is governed by the applicable license agreement and such license agreement is not modified in any way by the terms of this notice.

The manufacturer of this Documentation is CA.

Provided with "Restricted Rights." Use, duplication or disclosure by the United States Government is subject to the restrictions set forth in FAR Sections 12.212, 52.227-14, and 52.227-19(c)(1) - (2) and DFARS Section 252.227-7014(b)(3), as applicable, or their successors.

Copyright © 2014 CA. All rights reserved. All trademarks, trade names, service marks, and logos referenced herein belong to their respective companies.

Contact CA Technologies

Contact CA Support

For your convenience, CA Technologies provides one site where you can access the information that you need for your Home Office, Small Business, and Enterprise CA Technologies products. At <http://ca.com/support>, you can access the following resources:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to techpubs@ca.com.

To provide feedback about CA Technologies product documentation, complete our short customer survey which is available on the CA Support website at <http://ca.com/docs>.

Contents

Chapter 1: CA Clarity PPM Portlets 9

Portlet Reference	9
-------------------------	---

Chapter 2: Portlets (Listed by Role) 11

All Roles	11
Administrators	11
Financial Managers	12
Portfolio Managers	13
Project Managers	15
Resource Managers	17
Team Members	18

Chapter 3: Portlets (Listed by Name) 19

Action Items Portlet	22
Actuals by Transaction Type Portlet	23
Allocation Discrepancy Portlet	24
Balance Portlet	24
Booking Status Portlet	25
Capacity Overview Portlet	26
Capacity Overview Portlet: Investment Demand View	27
Capacity Overview Portlet: Staff Allocation View	28
Capacity Overview Portlet: Unfilled Roles View	29
Capital and Operating Budget vs. Forecast Portlet	29
Capital and Operating Cost Summary Portlet	30
Cost and Schedule Overview Portlet	30
Current Issues Portlet	31
Current Issues Listing Portlet	31
Discussion Messages Portlet	32
Earned Value Analysis by Phase Portlet	32
Earned Value Reporting Periods Portlet	33
Favorite Links Portlet	33
Favorite Photo Portlet	34
General Portlet	34
Idea List Portlet	35
Idea Processes Portlet	35
Investment Cost and Role Demand Portlet	36

Investment Cost by Period Portlet	36
Investment Financial Summary Portlet	37
Investment Planning by Period Portlet	37
Investment Schedule Portlet	38
Investment Timesheet Review Portlet	38
Investment Timesheet Summary Portlet	39
Issue Management Portlet	39
Issues by Priority Portlet	40
Issues Listing Portlet	40
Labor Effort Portlet	41
Late Status Reports Portlet	41
Late Tasks and Milestones Portlet	42
Milestones Portlet	42
Missing Status Reports Portlet	43
My Projects Portlet	43
My Reports Portlet	44
My Timesheets Portlet	44
Notifications Portlet	45
OBS Investment Aggregation Portlet	45
OBS Resource Aggregation Portlet	46
Pending Estimates Review Portlet	46
Planned Cost by Goal Portlet	47
Planned Cost by Project Type Portlet	47
Planned Cost by Waterline Portlet	48
Portfolio Capital and Operating Cost Analysis Portlet	48
Portfolio Capital and Operating Costs Portlet	49
Portfolio Cost and Benefit Analysis Portlet	49
Portfolio Cost by Overall Health Portlet	50
Portfolio Costs Portlet	50
Portfolio Investment Count by Approval Portlet	51
Portfolio Investment Count by Goal Portlet	51
Portfolio Investment Count by Type Portlet	52
Portfolio Investment Count by Waterline Portlet	52
Portfolio Investment Count by Work Status Portlet	53
Portfolio Planned Cost by Goal Portlet	53
Portfolio Planned NPV by Goal Portlet	54
Portfolio Role Analysis Portlet	54
Portfolio Role Demand by Goal Portlet	55
Portfolio Roles Portlet	55
Posted Transaction Review Portlet	56
Posted Transaction Review [Investment Level] Portlet	56
Process Bottlenecks Portlet	57

Program Manager Cost Dashboard Portlet	57
Program Manager Schedule Dashboard Portlet	58
Project Analysis Portlet	58
Project Baselines Portlet	59
Project Costs By Phase Portlet	59
Project Costs By Resource Portlet	60
Project Costs by Task Portlet	60
Project Cycle Time Analysis Portlet	61
Project Document Review Portlet	61
Project Indicators Portlet	62
Project KPIs by OBS Portlet	62
Project Lifecycle Review Portlet	63
Project Manager Cost and Effort Dashboard Portlet	63
Project Manager Schedule Dashboard Portlet	64
Project Schedule Portlet	64
Resource Utilization Portlet	65
Resource Utilization Percentage by Month Portlet	65
Resource Workloads Portlet	66
Rights by License Type Portlet	66
Risk Management Portlet	67
Role Capacity Portlet	67
Role Capacity and Demand Portlet	68
Role Capacity and Demand Histogram Portlet	68
Role Capacity Histogram Portlet	69
Role Demand by Goal Portlet	69
Role Demand by Waterline Portlet	70
Schedule and Progress Portlet	70
Schedule Performance Portlet	71
Schedule Performance Details Portlet	71
Site Links Portlet	72
Staffing Portlet	72
Staffing Details Portlet	73
Status Report Indicators Portlet	73
Status Report Listing Portlet	74
Subprojects Portlet	74
Team Capacity Portlet	75
Team Member Task Summary Portlet	75
Team Utilization Portlet	76
Timesheet Notes Portlet	77
Timesheet Review [Investment Level] Portlet	77
Timesheets to Approve Portlet	78
Top Down Planning by Investment Portlet	78

Unfilled Requirements Portlet	79
Upcoming Milestones Portlet	79
User Count by License Type Portlet	80
Weekly Detail Portlet	81

Chapter 1: CA Clarity PPM Portlets

Portlet Reference

This guide provides a description, the default navigation steps, and supporting technical properties for each standard and PMO portlet. Select from two viewing options:

- [View by Role](#) (see page 11)
- [View by Name](#) (see page 19)

Chapter 2: Portlets (Listed by Role)

This section contains the following topics:

[All Roles](#) (see page 11)
[Administrators](#) (see page 11)
[Financial Managers](#) (see page 12)
[Portfolio Managers](#) (see page 13)
[Project Managers](#) (see page 15)
[Resource Managers](#) (see page 17)
[Team Members](#) (see page 18)

All Roles

The following portlets are available and appropriate to all users in any role:

- [Action Items Portlet](#) (see page 22)
- [Favorite Links Portlet](#) (see page 33)
- [Favorite Photo Portlet](#) (see page 34)
- [General Portlet](#) (see page 34)
- [My Projects Portlet](#) (see page 43)
- [My Reports Portlet](#) (see page 44)
- [Notifications Portlet](#) (see page 45)
- [Site Links Portlet](#) (see page 72)

Administrators

The following portlets are available to administrators:

- [Earned Value Reporting Periods Portlet](#) (see page 33)
- [Rights by License Type Portlet](#) (see page 66)
- [Site Links Portlet](#) (see page 72)
- [User Count by License Type Portlet](#) (see page 80)

Financial Managers

The following portlets are available to financial managers:

- [Balance Portlet](#) (see page 24)
- [Capital and Operating Budget vs. Forecast Portlet](#) (see page 29)
- [Capital and Operating Cost Summary Portlet](#) (see page 30)
- [Investment Cost and Role Demand Portlet](#) (see page 36)
- [Investment Cost by Period Portlet](#) (see page 36)
- [Investment Financial Summary Portlet](#) (see page 37)
- [Investment Planning by Period Portlet](#) (see page 37)
- [Posted Transaction Review Portlet](#) (see page 56)
- [Posted Transaction Review \[Investment Level\] Portlet](#) (see page 56)
- [Risk Management Portlet](#) (see page 67)

Portfolio Managers

The following portlets are available to executives, senior directors, and portfolio managers:

- [Actuals by Transaction Type Portlet](#) (see page 23)
- [Balance Portlet](#) (see page 24)
- [Capital and Operating Budget vs. Forecast Portlet](#) (see page 29)
- [Capital and Operating Cost Summary Portlet](#) (see page 30)
- [Cost and Schedule Overview Portlet](#) (see page 30)
- [Earned Value Analysis by Phase Portlet](#) (see page 32)
- [Investment Cost and Role Demand Portlet](#) (see page 36)
- [Investment Cost by Period Portlet](#) (see page 36)
- [Investment Financial Summary Portlet](#) (see page 37)
- [Investment Planning by Period Portlet](#) (see page 37)
- [Investment Schedule Portlet](#) (see page 38)
- [OBS Investment Aggregation Portlet](#) (see page 45)
- [Pending Estimates Review Portlet](#) (see page 46)
- [Planned Cost by Goal Portlet](#) (see page 47)
- [Planned Cost by Project Type Portlet](#) (see page 47)
- [Planned Cost by Waterline Portlet](#) (see page 48)
- [Portfolio Capital and Operating Cost Analysis Portlet](#) (see page 48)
- [Portfolio Capital and Operating Costs Portlet](#) (see page 49)
- [Portfolio Cost and Benefit Analysis Portlet](#) (see page 49)
- [Portfolio Cost by Overall Health Portlet](#) (see page 50)
- [Portfolio Costs Portlet](#) (see page 50)
- [Portfolio Investment Count by Approval Portlet](#) (see page 51)
- [Portfolio Investment Count by Goal Portlet](#) (see page 51)
- [Portfolio Investment Count by Type Portlet](#) (see page 52)
- [Portfolio Investment Count by Waterline Portlet](#) (see page 52)
- [Portfolio Investment Count by Work Status Portlet](#) (see page 53)
- [Portfolio Planned Cost by Goal Portlet](#) (see page 53)
- [Portfolio Planned NPV by Goal Portlet](#) (see page 54)
- [Portfolio Role Analysis Portlet](#) (see page 54)

- [Portfolio Role Demand by Goal Portlet](#) (see page 55)
- [Portfolio Roles Portlet](#) (see page 55)
- [Posted Transaction Review Portlet](#) (see page 56)
- [Posted Transaction Review \[Investment Level\] Portlet](#) (see page 56)
- [Project Baselines Portlet](#) (see page 59)
- [Project Costs By Phase Portlet](#) (see page 59)
- [Project Cycle Time Analysis Portlet](#) (see page 61)
- [Project Indicators Portlet](#) (see page 62)
- [Project KPIs by OBS Portlet](#) (see page 62)
- [Project Schedule Portlet](#) (see page 64)
- [Resource Utilization Portlet](#) (see page 65)

Project Managers

The following portlets are available to service, business unit, program, and project managers:

- [Balance Portlet](#) (see page 24)
- [Current Issues Portlet](#) (see page 31)
- [Current Issues Listing Portlet](#) (see page 31)
- [Discussion Messages Portlet](#) (see page 32)
- [Idea List Portlet](#) (see page 35)
- [Idea Processes Portlet](#) (see page 35)
- [Issue Management Portlet](#) (see page 39)
- [Issues by Priority Portlet](#) (see page 40)
- [Issues Listing Portlet](#) (see page 40)
- [Labor Effort Portlet](#) (see page 41)
- [Late Status Reports Portlet](#) (see page 41)
- [Late Tasks and Milestones Portlet](#) (see page 42)
- [Milestones Portlet](#) (see page 42)
- [Missing Status Reports Portlet](#) (see page 43)
- [My Projects Portlet](#) (see page 43)
- [OBS Investment Aggregation Portlet](#) (see page 45)
- [OBS Resource Aggregation Portlet](#) (see page 46)
- [Pending Estimates Review Portlet](#) (see page 46)
- [Planned Cost by Goal Portlet](#) (see page 47)
- [Planned Cost by Project Type Portlet](#) (see page 47)
- [Planned Cost by Waterline Portlet](#) (see page 48)
- [Posted Transaction Review Portlet](#) (see page 56)
- [Posted Transaction Review \[Investment Level\] Portlet](#) (see page 56)
- [Process Bottlenecks Portlet](#) (see page 57)
- [Program Manager Cost Dashboard Portlet](#) (see page 57)
- [Program Manager Schedule Dashboard Portlet](#) (see page 58)
- [Project Analysis Portlet](#) (see page 58)
- [Project Baselines Portlet](#) (see page 59)
- [Project Costs By Phase Portlet](#) (see page 59)

- [Project Costs by Task Portlet](#) (see page 60)
- [Project Cycle Time Analysis Portlet](#) (see page 61)
- [Project Document Review Portlet](#) (see page 61)
- [Project Indicators Portlet](#) (see page 62)
- [Project KPIs by OBS Portlet](#) (see page 62)
- [Project Lifecycle Review Portlet](#) (see page 63)
- [Project Manager Cost and Effort Dashboard Portlet](#) (see page 63)
- [Project Manager Schedule Dashboard Portlet](#) (see page 64)
- [Project Schedule Portlet](#) (see page 64)
- [Risk Management Portlet](#) (see page 67)
- [Schedule and Progress Portlet](#) (see page 70)
- [Schedule Performance Portlet](#) (see page 71)
- [Schedule Performance Details Portlet](#) (see page 71)
- [Site Links Portlet](#) (see page 72)
- [Status Report Indicators Portlet](#) (see page 73)
- [Status Report Listing Portlet](#) (see page 74)
- [Subprojects Portlet](#) (see page 74)
- [Unfilled Requirements Portlet](#) (see page 79)
- [Upcoming Milestones Portlet](#) (see page 79)

Resource Managers

The following portlets are available to resource managers:

- [Action Items Portlet](#) (see page 22)
- [Actuals by Transaction Type Portlet](#) (see page 23)
- [Allocation Discrepancy Portlet](#) (see page 24)
- [Booking Status Portlet](#) (see page 25)
- [Capacity Overview Portlet](#) (see page 26)
- [Investment Timesheet Review Portlet](#) (see page 38)
- [Investment Timesheet Summary Portlet](#) (see page 39)
- [Labor Effort Portlet](#) (see page 41)
- [Late Tasks and Milestones Portlet](#) (see page 42)
- [OBS Investment Aggregation Portlet](#) (see page 45)
- [OBS Resource Aggregation Portlet](#) (see page 46)
- [Pending Estimates Review Portlet](#) (see page 46)
- [Process Bottlenecks Portlet](#) (see page 57)
- [Project Costs By Phase Portlet](#) (see page 59)
- [Project Costs By Resource Portlet](#) (see page 60)
- [Project Schedule Portlet](#) (see page 64)
- [Resource Utilization Portlet](#) (see page 65)
- [Resource Utilization Percentage by Month Portlet](#) (see page 65)
- [Resource Workloads Portlet](#) (see page 66)
- [Role Capacity Portlet](#) (see page 67)
- [Role Capacity and Demand Portlet](#) (see page 68)
- [Role Capacity and Demand Histogram Portlet](#) (see page 68)
- [Role Demand by Goal Portlet](#) (see page 69)
- [Role Demand by Waterline Portlet](#) (see page 70)
- [Role Capacity Histogram Portlet](#) (see page 69)
- [Schedule Performance Portlet](#) (see page 71)
- [Schedule Performance Details Portlet](#) (see page 71)
- [Staffing Portlet](#) (see page 72)
- [Staffing Details Portlet](#) (see page 73)
- [Subprojects Portlet](#) (see page 74)

- [Team Capacity Portlet](#) (see page 75)
- [Team Member Task Summary Portlet](#) (see page 75)
- [Team Utilization Portlet](#) (see page 76)
- [Timesheet Notes Portlet](#) (see page 77)
- [Timesheet Review \[Investment Level\] Portlet](#) (see page 77)
- [Timesheets to Approve Portlet](#) (see page 78)
- [Top Down Planning by Investment Portlet](#) (see page 78)
- [Unfilled Requirements Portlet](#) (see page 79)
- [Upcoming Milestones Portlet](#) (see page 79)
- [Weekly Detail Portlet](#) (see page 81)

Team Members

The following portlets are available to team members and other resources who contribute to a project:

- [Action Items Portlet](#) (see page 22)
- [Discussion Messages Portlet](#) (see page 32)
- [Favorite Links Portlet](#) (see page 33)
- [Favorite Photo Portlet](#) (see page 34)
- [General Portlet](#) (see page 34)
- [Idea List Portlet](#) (see page 35)
- [My Projects Portlet](#) (see page 43)
- [My Reports Portlet](#) (see page 44)
- [My Timesheets Portlet](#) (see page 44)
- [Notifications Portlet](#) (see page 45)
- [Project Document Review Portlet](#) (see page 61)
- [Site Links Portlet](#) (see page 72)
- [Subprojects Portlet](#) (see page 74)
- [Team Utilization Portlet](#) (see page 76)
- [Timesheet Notes Portlet](#) (see page 77)

Chapter 3: Portlets (Listed by Name)

This section contains the following topics:

[Action Items Portlet](#) (see page 22)
[Actuals by Transaction Type Portlet](#) (see page 23)
[Allocation Discrepancy Portlet](#) (see page 24)
[Balance Portlet](#) (see page 24)
[Booking Status Portlet](#) (see page 25)
[Capacity Overview Portlet](#) (see page 26)
[Capacity Overview Portlet: Investment Demand View](#) (see page 27)
[Capacity Overview Portlet: Staff Allocation View](#) (see page 28)
[Capacity Overview Portlet: Unfilled Roles View](#) (see page 29)
[Capital and Operating Budget vs. Forecast Portlet](#) (see page 29)
[Capital and Operating Cost Summary Portlet](#) (see page 30)
[Cost and Schedule Overview Portlet](#) (see page 30)
[Current Issues Portlet](#) (see page 31)
[Current Issues Listing Portlet](#) (see page 31)
[Discussion Messages Portlet](#) (see page 32)
[Earned Value Analysis by Phase Portlet](#) (see page 32)
[Earned Value Reporting Periods Portlet](#) (see page 33)
[Favorite Links Portlet](#) (see page 33)
[Favorite Photo Portlet](#) (see page 34)
[General Portlet](#) (see page 34)
[Idea List Portlet](#) (see page 35)
[Idea Processes Portlet](#) (see page 35)
[Investment Cost and Role Demand Portlet](#) (see page 36)
[Investment Cost by Period Portlet](#) (see page 36)
[Investment Financial Summary Portlet](#) (see page 37)
[Investment Planning by Period Portlet](#) (see page 37)
[Investment Schedule Portlet](#) (see page 38)
[Investment Timesheet Review Portlet](#) (see page 38)
[Investment Timesheet Summary Portlet](#) (see page 39)
[Issue Management Portlet](#) (see page 39)
[Issues by Priority Portlet](#) (see page 40)
[Issues Listing Portlet](#) (see page 40)
[Labor Effort Portlet](#) (see page 41)
[Late Status Reports Portlet](#) (see page 41)
[Late Tasks and Milestones Portlet](#) (see page 42)
[Milestones Portlet](#) (see page 42)
[Missing Status Reports Portlet](#) (see page 43)
[My Projects Portlet](#) (see page 43)
[My Reports Portlet](#) (see page 44)
[My Timesheets Portlet](#) (see page 44)
[Notifications Portlet](#) (see page 45)
[OBS Investment Aggregation Portlet](#) (see page 45)
[OBS Resource Aggregation Portlet](#) (see page 46)
[Pending Estimates Review Portlet](#) (see page 46)
[Planned Cost by Goal Portlet](#) (see page 47)
[Planned Cost by Project Type Portlet](#) (see page 47)
[Planned Cost by Waterline Portlet](#) (see page 48)

[Portfolio Capital and Operating Cost Analysis Portlet](#) (see page 48)
[Portfolio Capital and Operating Costs Portlet](#) (see page 49)
[Portfolio Cost and Benefit Analysis Portlet](#) (see page 49)
[Portfolio Cost by Overall Health Portlet](#) (see page 50)
[Portfolio Costs Portlet](#) (see page 50)
[Portfolio Investment Count by Approval Portlet](#) (see page 51)
[Portfolio Investment Count by Goal Portlet](#) (see page 51)
[Portfolio Investment Count by Type Portlet](#) (see page 52)
[Portfolio Investment Count by Waterline Portlet](#) (see page 52)
[Portfolio Investment Count by Work Status Portlet](#) (see page 53)
[Portfolio Planned Cost by Goal Portlet](#) (see page 53)
[Portfolio Planned NPV by Goal Portlet](#) (see page 54)
[Portfolio Role Analysis Portlet](#) (see page 54)
[Portfolio Role Demand by Goal Portlet](#) (see page 55)
[Portfolio Roles Portlet](#) (see page 55)
[Posted Transaction Review Portlet](#) (see page 56)
[Posted Transaction Review \[Investment Level\] Portlet](#) (see page 56)
[Process Bottlenecks Portlet](#) (see page 57)
[Program Manager Cost Dashboard Portlet](#) (see page 57)
[Program Manager Schedule Dashboard Portlet](#) (see page 58)
[Project Analysis Portlet](#) (see page 58)
[Project Baselines Portlet](#) (see page 59)
[Project Costs By Phase Portlet](#) (see page 59)
[Project Costs By Resource Portlet](#) (see page 60)
[Project Costs by Task Portlet](#) (see page 60)
[Project Cycle Time Analysis Portlet](#) (see page 61)
[Project Document Review Portlet](#) (see page 61)
[Project Indicators Portlet](#) (see page 62)
[Project KPIs by OBS Portlet](#) (see page 62)
[Project Lifecycle Review Portlet](#) (see page 63)
[Project Manager Cost and Effort Dashboard Portlet](#) (see page 63)
[Project Manager Schedule Dashboard Portlet](#) (see page 64)
[Project Schedule Portlet](#) (see page 64)
[Resource Utilization Portlet](#) (see page 65)
[Resource Utilization Percentage by Month Portlet](#) (see page 65)
[Resource Workloads Portlet](#) (see page 66)
[Rights by License Type Portlet](#) (see page 66)
[Risk Management Portlet](#) (see page 67)
[Role Capacity Portlet](#) (see page 67)
[Role Capacity and Demand Portlet](#) (see page 68)
[Role Capacity and Demand Histogram Portlet](#) (see page 68)
[Role Capacity Histogram Portlet](#) (see page 69)
[Role Demand by Goal Portlet](#) (see page 69)
[Role Demand by Waterline Portlet](#) (see page 70)
[Schedule and Progress Portlet](#) (see page 70)
[Schedule Performance Portlet](#) (see page 71)
[Schedule Performance Details Portlet](#) (see page 71)
[Site Links Portlet](#) (see page 72)
[Staffing Portlet](#) (see page 72)

[Staffing Details Portlet](#) (see page 73)
[Status Report Indicators Portlet](#) (see page 73)
[Status Report Listing Portlet](#) (see page 74)
[Subprojects Portlet](#) (see page 74)
[Team Capacity Portlet](#) (see page 75)
[Team Member Task Summary Portlet](#) (see page 75)
[Team Utilization Portlet](#) (see page 76)
[Timesheet Notes Portlet](#) (see page 77)
[Timesheet Review \[Investment Level\] Portlet](#) (see page 77)
[Timesheets to Approve Portlet](#) (see page 78)
[Top Down Planning by Investment Portlet](#) (see page 78)
[Unfilled Requirements Portlet](#) (see page 79)
[Upcoming Milestones Portlet](#) (see page 79)
[User Count by License Type Portlet](#) (see page 80)
[Weekly Detail Portlet](#) (see page 81)

Action Items Portlet

Use this portlet to view the action items that you create or that other users assign to you. This portlet displays the status, due date, and assignee for each action item.

Follow these steps:

Open Home and under Personal select General.

Standard or Add-in: Standard

Portlet ID: calendar.myActionItems

Category: Collaboration

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Actuals by Transaction Type Portlet

Use this portlet to view the actual quantity and cost for posted transactions organized by transaction type, resource, and transaction date.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project.
The project Dashboard tab appears.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select Project Default Layout or PMO-Project Status.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.prjTrxTypeHierarchy

Category: Productivity

Data Provider: Actuals by Transaction Type

Data Provider ID: cop.trxTypeHierarchyLinkable

Data Provider Type: Query

Allocation Discrepancy Portlet

Use this portlet to view the team members with a discrepancy between their allocations and actuals, above or below a specified threshold. The portlet displays the difference between allocated hours for a resource and the actual hours that the resource has logged against their assignments for investments. You can specify which resources to display by altering the Deviation Threshold percentage value in the filter section of the portlet. By default, 20 percent is the deviation threshold. The Duration field determines how many periods to use for the calculation of allocations and posted actuals. The Time Scale field determines the length of time to use for the calculations.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Allocations tab on the Resource Planning page.

Standard or Add-in: Standard

Portlet ID: projmgr.allocationDiscrepancy

Category: Resource

Data Provider: Actuals vs Allocation Discrepancy

Data Provider ID: allocationDiscrepancy

Data Provider Type: System

Balance Portlet

Use this portlet to compare the planned cost and risk of investments with their business alignment and finish dates. Each bubble on the graph represents an investment. The size of the bubble measures the planned cost of the investment.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Scorecard tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvBalance

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Booking Status Portlet

Use this portlet to view and edit resource booking status and other allocation information by investment. This portlet provides the following information for each resource by investment:

- role
- booking status
- start and finish dates
- allocation hours
- allocation percentage

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Bookings tab.

Standard or Add-in: Standard

Portlet ID: projmgr.bookingStatus

Category: Resource

Data Provider: Team Allocations

Data Provider ID: teams

Data Provider Type: System

Capacity Overview Portlet

Use this portlet to view the capacity, demand, remaining capacity, and actual hours provided by any given unit in the organization from the Resource OBS hierarchy. The portlet provides information at aggregated and detailed levels in three additional portlet views:

- Investment Demand View
- Staff Allocation View
- Unfilled Roles View

Follow these steps:

1. Open Home and under Resource Management select Capacity Overview.
2. Select an OBS and click Filter in the Resource OBS field.

Standard or Add-in: Standard

Portlet ID: projmgr.obsCapacityPlan

Category: Resource

Data Provider: projmgr.obsCapacityOverview

Data Provider ID: obsCapacityOverview

Data Provider Type: System

Capacity Overview Portlet: Investment Demand View

Use this view from the Capacity Overview portlet to examine the following details for the selected OBS:

- investment names
- investment managers
- investment start and finish dates
- allocation of resources

The portlet displays a list of investments with the allocation data for named resources and roles. Each row in the portlet corresponds to an investment with the staff members of the selected OBS.

Follow these steps:

1. Open Home and under Resource Management select Capacity Overview.
2. Click the Investment Demand icon in any OBS row in the Capacity Overview portlet.

Standard or Add-in: Standard

Portlet ID: projmgr.obsCapacityPlan

Category: Resource

Data Provider: pma.capacityOverviewInvDemand

Data Provider ID: pma.capacityOverviewInvDemand

Data Provider Type: Not Applicable

Capacity Overview Portlet: Staff Allocation View

Use this view from the Capacity Overview portlet to examine the following details for the selected OBS:

- name of each resource
- primary role
- allocation over the same time periods that appear in the Capacity Overview portlet

The portlet displays allocation data for the named resources that are assigned to the Resource OBS that you selected in the filter.

Note: The allocation is blank for resources that are associated with the Resource OBS but are not allocated to any projects.

Follow these steps:

1. Open Home and under Resource Management select Capacity Overview.
2. Click the Staff Allocation icon in any row for an OBS in the Capacity Overview portlet.

Standard or Add-in: Standard

Portlet ID: projmgr.obsCapacityPlan

Category: Resource

Data Provider: Not applicable

Data Provider ID: projmgr.staffAllocationOverview

Data Provider Type: System

Capacity Overview Portlet: Unfilled Roles View

Use this view from the Capacity Overview portlet to examine the following details for the selected OBS:

- unfilled role requests
- investments that are requesting roles
- allocation information for the role requests

Each row in the portlet corresponds to an unfilled role in an investment.

Follow these steps:

1. Open Home and under Resource Management select Capacity Overview.
2. Click the Unfilled Roles icon in a row for an OBS in the Capacity Overview portlet.

Standard or Add-in: Standard

Portlet ID: projmgr.obsCapacityPlan

Category: Resource

Data Provider: projmgr.unfilledRequirements

Data Provider ID: projmgr.unfilledRequirements

Data Provider Type: System

Capital and Operating Budget vs. Forecast Portlet

Use this portlet to view budgeted, actual, and forecast costs and the budget to forecast cost variances for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Financials tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvCapitalOperatingBudgetForecast

Category: Productivity

Data Provider: Portfolio Investment Financial Performance

Data Provider ID: pfm_finperformance

Data Provider Type: System

Capital and Operating Cost Summary Portlet

Use this portlet to view planned and actual investment costs including capital, operating, and total costs. View investment totals, distributed targets, and variances.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Financials tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvCapitalOperatingCostSummary

Category: Productivity

Data Provider: Portfolio Investment Financial Performance

Data Provider ID: pfm_finperformance

Data Provider Type: System

Cost and Schedule Overview Portlet

Use this portlet to view metrics, performance indicators, and risk information for each project associated with a program.

Follow these steps:

1. Open Home and under Portfolio Management select Programs.
2. Select a program.

The program Dashboard tab appears.

Standard or Add-in: PMO

Portlet ID: cop.dashboardProgramCSR

Category: Productivity

Data Provider: Cost and Schedule Overview

Data Provider ID: cop.dashboardProgramCSR

Data Provider Type: Query

Current Issues Portlet

Use this portlet to view the number or percentage of issues grouped by priority in a pie chart. You can filter the data by OBS or Project Manager and adjust the range of days (Days Outlook) from a starting point (As of Date).

Follow these steps:

1. Open Home and under Personal select General.
2. Click the PM Alerts tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.currentIssues

Category: Productivity

Data Provider: Current Issues

Data Provider ID: cop.currentIssues

Data Provider Type: Query

Current Issues Listing Portlet

Use this portlet to view details about issues spanning one or more days. The portlet indicates whether the target resolution date of an issue is on track.

Follow these steps:

1. Open Home and under Personal select General.
2. On the Overview page, click the PM Alerts tab.
3. In the Current Issues portlet, click a visual data element. For example, click a slice in a pie chart, click a bar in a bar chart, or click a data point in a line graph.

Standard or Add-in: PMO

Portlet ID: cop.currentIssuesListingLinkable

Category: Productivity

Data Provider: Current Issues Listing

Data Provider ID: cop.currentIssuesLinkable

Data Provider Type: Query

Discussion Messages Portlet

Use this portlet to view posted messages.

Follow these steps:

Open Home and under Personal select General.

Note: By default, this portlet does not appear; however, you can add it to any page.

Standard or Add-in: Standard

Portlet ID: ntd.homeMessages

Category: Collaboration

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Earned Value Analysis by Phase Portlet

Use this portlet to view the earned value metrics for each project phase.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project.

The Dashboard tab appears.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select PMO-Project Storyboard.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.prjEarnedValuePhaseAnalysis

Category: Productivity

Data Provider: Earned Value Analysis by Phase

Data Provider ID: cop.earnedValuePhaseAnalysis

Data Provider Type: Query

Earned Value Reporting Periods Portlet

As an administrator, use this portlet to view time periods for earned value reporting.

Follow these steps:

Open Administration and under Earned Value Management select Period Definitions.

Standard or Add-in: Standard

Portlet ID: Not applicable

Category: Project

Data Provider: PeriodDef

Data Provider ID: Not applicable

Data Provider Type: Not applicable

Favorite Links Portlet

Use this portlet to store your favorite links to external web sites, intranet sites, or internal links to other CA Clarity PPM pages.

Follow these steps:

Open Home and under Personal select General.

Standard or Add-in: Standard

Portlet ID: nde.homeFavLinks

Category: Personal

Data Provider: Not applicable

Data Provider ID: Not applicable

Data Provider Type: Not applicable

Favorite Photo Portlet

Use this portlet to display a single graphic to personalize your user interface. Valid picture file formats include .jpg, .gif, and .png.

Follow these steps:

1. Open Home and under Personal select General.
2. Click Personalize and then click Add to add the Favorite Photo portlet to the page.
3. Click Options and then select Configure to set a favorite photo.

Standard or Add-in: Standard

Portlet ID: nde.homePhoto

Category: Personal

Data Provider: Not applicable

Data Provider ID: Not applicable

Data Provider Type: Not applicable

General Portlet

Use this portlet to view the standard information for a project.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project.
The Dashboard tab appears.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select Project Default Layout.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: Standard

Portlet ID: project.General

Category: Project

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Idea List Portlet

Use this portlet to view a list of ideas by type, category, priority, cost, return, NPV, start date, and status. You can click an idea to view details and edit its properties.

Follow these steps:

Open Home and under Demand Management select Ideas.

Standard or Add-in: Standard

Portlet ID: pma.ideaPortlet

Category: Idea Management

Data Provider: Idea

Data Provider ID: Idea

Data Provider Type: Object

Idea Processes Portlet

As a marketing or product manager, use the Idea Processes portlet to view the status of the current ideas moving through the approval process. Click the process icon to see the progress of the idea and drill down to the idea properties page.

Follow these steps:

1. Configure and activate an idea process flow.
2. Navigate to the Idea Management Overview page.

Standard or Add-in: Accelerator for New Product Development (NPD)

Portlet ID: pma.ideaPortlet

Category: Idea Management

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Investment Cost and Role Demand Portlet

Use this portlet to view the planned, actual, and remaining role amounts for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Analysis tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvCostRoleDemand

Category: Productivity

Data Provider: Portfolio Investment Financial Performance

Data Provider ID: pfm_finperformance

Data Provider Type: System

Investment Cost by Period Portlet

Use this portlet to view the planned, actual, remaining, and forecast cost for investments in a portfolio. View amounts by period or in total.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Financials tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvCostByPeriod

Category: Productivity

Data Provider: Portfolio Investment Financial Performance

Data Provider ID: pfm_finperformance

Data Provider Type: System

Investment Financial Summary Portlet

Use this portlet to view financial amounts and metrics, including NPV and ROI, for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Financials tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvFinancialSummary

Category: Productivity

Data Provider: Portfolio Investment Financial Performance

Data Provider ID: pfm_finperformance

Data Provider Type: System

Investment Planning by Period Portlet

Use this portlet to edit the planned benefit, capital cost, and operating cost by period for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Financials tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvPlanningByPeriod

Category: Productivity

Data Provider: Portfolio Investment Financial Performance

Data Provider ID: pfm_finperformance

Data Provider Type: System

Investment Schedule Portlet

Use this portlet to view the schedule, planned cost, and role demand for investments in a portfolio. You can view the list of portfolio investments and compare their schedules.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Capacity tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvSchedule

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Investment Timesheet Review Portlet

Use this portlet to view pending and posted actuals by task, resource, and time period with expandable notes.

Follow these steps:

1. Open Home and under Resource Management select Timesheet Overview.
2. Click the arrow icon in the Timesheet Details column of the Investment Timesheet Summary portlet.

The Timesheet Details page appears including the Investment Timesheet Review portlet.
3. Click the check mark icon in the Notes Attached column to view the Timesheet Notes portlet.
4. (Optional) Click the clock icon in the Timesheet column to open the timesheet. Click the note icon to view or add a timesheet note.

Standard or Add-in: PMO

Portlet ID: cop.prjTimesheetReview

Category: Productivity

Data Provider: Investment Timesheet Review

Data Provider ID: cop.prjTimesheetReview

Data Provider Type: Query

Investment Timesheet Summary Portlet

Use this portlet to view pending and posted actuals by investment, with expandable details.

Follow these steps:

Open Home and under Resource Management select Timesheet Overview.

Standard or Add-in: PMO

Portlet ID: cop.invTimesheetReview

Category: Productivity

Data Provider: Investment Timesheet Summary

Data Provider ID: cop.invTimesheetReview

Data Provider Type: Query

Issue Management Portlet

Use this portlet to view a list of issues, including risk items, by project. Default columns display the priority, schedule impact, category, owner, and resolution date. You can click the envelope icon in the Email column to send mail to the owner of the issue. Click an issue to open it. You can filter the data by OBS or Project Manager.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Risks, Issues, and Changes tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.issueManagement

Category: Productivity

Data Provider: Issue Management

Data Provider ID: cop.issueManagement

Data Provider Type: Query

Issues by Priority Portlet

Use this portlet to view a pie chart that shows the relative quantity of issues by priority. Each color-coded slice represents a priority value and the size of each slice represents the number of issues for that priority. Click a pie slice to open the details of the issue on the Current Issues Drill Down page. This portlet does not have filters; however, issues with a status of *Resolved* or *Closed* are excluded.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select Settings.
 - b. In the Dashboard View field, select PMO-Project Storyboard.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.issuesByPriorityLinkable

Category: Productivity

Data Provider: Issues By Priority

Data Provider ID: cop.issuesByPriorityLinkable

Data Provider Type: Query

Issues Listing Portlet

Use this portlet to view details about issues indicating whether the target resolution date of an issue is on track.

Follow these steps:

1. Navigate to the [Issues by Priority Portlet](#) (see page 40).
2. Click a pie chart slice in the Issues by Priority portlet for a project.

Standard or Add-in: PMO

Portlet ID: cop.prjCurrentIssuesLinkable

Category: Productivity

Data Provider: Issues Listing

Data Provider ID: cop.prjCurrentIssuesLinkable

Data Provider Type: Query

Labor Effort Portlet

Use this portlet to view the labor resource effort for a project. You can compare up-to-date actuals and estimates, and view overall baseline and allocation variances.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. On the Projects page, click a project.
The Dashboard tab appears.
3. Enable the page layout for this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select Project Default Layout.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: Standard

Portlet ID: project.Effort

Category: Project

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Late Status Reports Portlet

Use this portlet to identify the projects that have late status reports, based on the days since report date filter.

Follow these steps:

1. Open Home, and under Dashboards, click Status Report Review.
2. Click the Late and Missing Status Reports tab on the Status Report Review page.

Standard or Add-in: PMO

Portlet ID: cop.prjStatusReportsLate

Category: Productivity

Data Provider: Late Status Reports

Data Provider ID: cop.prjStatusReportsLate

Data Provider Type: Query

Late Tasks and Milestones Portlet

Use this portlet to view a list of late tasks and milestones including a Gantt chart for a project.

Note: This portlet is available with the PMO add-in but is not included on any pages. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.lateTasksMilestonesLinkable

Category: Productivity

Data Provider: Late Tasks and Milestones

Data Provider ID: cop.lateTasksMilestoneLinkable

Data Provider Type: Query

Milestones Portlet

Use this portlet to view a list of projects and milestones including their planned finish date, schedule percent complete, and cumulative days late. You can filter the data by OBS or Project Manager and adjust the range of days (Days Outlook) from a starting point (As of Date).

Follow these steps:

1. Open Home and under Personal select General.
2. Click the PM Alerts tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.prt.upcomingMilestones

Category: Productivity

Data Provider: Milestones

Data Provider ID: cop.qry.upcomingMilestones

Data Provider Type: Query

Missing Status Reports Portlet

Use this portlet to view projects that do not have at least one status report completed.

Follow these steps:

1. Open Home, and from Dashboards, click Status Report Review.
2. Click the Late and Missing Status Reports tab on the Status Report Review page.

Standard or Add-in: PMO

Portlet ID: cop.prjStatusReportsMissing

Category: Productivity

Data Provider: Missing Status Reports

Data Provider ID: cop.prjStatusReportsMissing

Data Provider Type: Query

My Projects Portlet

Use this portlet to view your favorite projects. Convenient buttons also allow you to create new projects including new projects based on existing templates.

Follow these steps:

Open Home and under Personal select General.

Standard or Add-in: Standard

Portlet ID: projmgr.homeHotList

Category: Project

Data Provider: Project Object - Views

Data Provider ID: project

Data Provider Type: Object

My Reports Portlet

Use this portlet to store your favorite reports. You can also save your own personal parameters so that the report output aligns with your expectations.

Follow these steps:

Open Home and under Personal select General.

Standard or Add-in: Standard

Portlet ID: reporting.myReports

Category: Personal

Data Provider: Not applicable

Data Provider ID: Not applicable

Data Provider Type: Not applicable

My Timesheets Portlet

Use this portlet to view your timesheets.

Follow these steps:

Open Home and under Personal select General.

Standard or Add-in: PMO

Portlet ID: cop.invMyTimesheets

Category: Productivity

Data Provider: My Timesheets

Data Provider ID: cop.invMyTimesheets

Data Provider Type: Query

Notifications Portlet

Use this portlet to view a summary count of notifications sent to you by category. Categories include Action Items, Change Requests, Discussions, Escalations, Finance, Timesheets, and other functional areas. Click a category to view more details about the notifications. You can configure this portlet to receive notifications by application alerts, email, or SMS text messages.

Follow these steps:

Open Home and under Personal select General.

Standard or Add-in: Standard

Portlet ID: personal.notificationsNugget

Category: Collaboration

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

OBS Investment Aggregation Portlet

This portlet helps you determine the aggregate demand for investments by OBS. The portlet calculates demand using the planned allocation for all resources that are booked to investments for the selected OBS units.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. On the Resource Planning page, click the Organizational Demand tab.
3. (Optional) Expand and save a default filter for a specific OBS.

Standard or Add-in: Standard

Portlet ID: projmgr.OBSInvestmentAggregation

Category: Project

Data Provider: OBS Investment Aggregation

Data Provider ID: obsInvAggregate

Data Provider Type: System

OBS Resource Aggregation Portlet

Use this portlet to view the resource demand and capacity for all investments by OBS. Expand the OBS hierarchy and view resource allocation by OBS unit. Allocations for each resource appear in the following full-time equivalent (FTE) measurements:

- 1.00 FTE = Full-time allocation (100 percent)
- 1.50 FTE = Over allocation (150 percent)
- 0.50 FTE = Half-time allocation (50 percent)

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. On the Resource Planning page, click the Organizational Demand tab.
3. (Optional) Click the Expand Filter icon in the toolbar. Save a default filter for a specific OBS.

Standard or Add-in: Standard

Portlet ID: projmgr.OBSResourceAggregation

Category: Resource

Data Provider: OBS Resource Aggregation

Data Provider ID: obsResAggregate

Data Provider Type: System

Pending Estimates Review Portlet

Use this portlet to view pending actuals, ETC values, and recommended changes by project, task, and resource.

Follow these steps:

Open Home and under Resource Management select Timesheet Overview.

Standard or Add-in: PMO

Portlet ID: cop.prjPendingEstimates

Category: Productivity

Data Provider: Pending Estimates

Data Provider ID: cop.prjPendingEstimates

Data Provider Type: Query

Planned Cost by Goal Portlet

Use the pie chart in this portlet to view planned cost grouped by goal for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Analysis tab.
4. Personalize the Analysis tab to include the Planned Cost by Goal portlet.
5. Map the Above Waterline filter attribute to the Above Waterline mapping field on the Page Filters tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvPlannedCostByGoal

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Planned Cost by Project Type Portlet

Use this portlet to identify what types of projects the organization is currently funding. A pie chart shows the planned cost of each project type expressed as a percentage of overall spending.

Follow these steps:

1. Open Home and under Personal select General.
2. On the Overview page, click the Sponsor tab.

Standard or Add-in: PMO

Portlet ID: cop.projectsByBudgetedCost

Category: Productivity

Data Provider: Project

Data Provider ID: project

Data Provider Type: Object

Planned Cost by Waterline Portlet

Use the pie chart in this portlet to view the planned costs above and below the waterline for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Analysis tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvPlannedCostByWaterline

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Capital and Operating Cost Analysis Portlet

Use this portlet to view planned, target, and actual costs and variances for total, capital, and operating cost amounts for each portfolio. Filter by portfolio, OBS, portfolio plan type, manager, stakeholder, above waterline, or active setting.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Capital and Operating tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmCapitalOperatingCostAnalysis

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Portfolio Capital and Operating Costs Portlet

Use this portlet to view the planned total, capital, and operating cost of each portfolio in an area chart. Determine the portion of planned cost that represents capital expense (CAPEX) and operating expense (OPEX) for investments in the portfolio. Filter by portfolio, OBS, portfolio plan type, manager, stakeholder, above waterline, or active setting.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Capital and Operating tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmCapitalOperatingCosts

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Portfolio Cost and Benefit Analysis Portlet

Use this portlet to view the target, distributed, and planned cost and benefit amounts for each portfolio. Assess the overall health, risk, and cost variances of portfolios. Filter by portfolio, OBS, portfolio plan type, manager, stakeholder, above waterline, or active setting.

Note: By default, the Portfolio Plan Type filter is *Portfolio* and the costs and variances are calculated as of the last sync. When you set the filter to *Plan of Record*, the amounts are based on the portfolio plan that is marked as the plan of record. You must have a plan of record on the portfolio for it to appear in the portlet.

Follow these steps:

Open Home and under Portfolio Management click Portfolio Dashboard.

Standard or Add-in: PMO

Portlet ID: cop.pfmCostBenefitAnalysis

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Portfolio Cost by Overall Health Portlet

Use this portlet to view the planned cost of the portfolio investments and to compare the overall health with the target total cost. Each bubble in the chart represents a portfolio and the size of the bubble represents the planned cost of the portfolio investments. Filter by portfolio, OBS, portfolio plan type, manager, stakeholder, above waterline, or active setting.

Note: By default, the Portfolio Plan Type filter is *Portfolio* and the costs and variances are calculated as of the last sync. When you set the filter to *Plan of Record*, the amounts are based on the portfolio plan that is marked as the plan of record. You must have a plan of record on the portfolio for it to appear in the portlet.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Cost and Health tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmCostByOverallHealth

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Portfolio Costs Portlet

Use this portlet to compare the target, distributed, and planned cost for each portfolio in a bar chart. Filter by portfolio, OBS, portfolio plan type, manager, stakeholder, above waterline, or active setting.

Note: By default, the Portfolio Plan Type filter is *Portfolio* and the costs and variances are calculated as of the last sync. When you set the filter to *Plan of Record*, the amounts are based on the portfolio plan that is marked as the plan of record. You must have a plan of record on the portfolio for it to appear in the portlet.

Follow these steps:

Open Home and under Portfolio Management select Portfolio Dashboard.

Standard or Add-in: PMO

Portlet ID: cop.pfmCosts

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Portfolio Investment Count by Approval Portlet

Use this portlet to view the number of approved and unapproved portfolio investments in a donut chart. Filter by portfolio, portfolio plan type, above waterline, or active setting.

Follow these steps:

1. Open Home and under Portfolio Management click Portfolio Dashboard.
2. Click the Investment Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvestmentCountByApproval

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Investment Count by Goal Portlet

Use this portlet to view the number of portfolio investments grouped by goal in a bar chart.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Goal Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvestmentCountByGoal

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Investment Count by Type Portlet

Use this portlet to view the number of portfolio investments grouped by investment type in a donut chart. Filter by portfolio, portfolio plan type, above waterline, or active setting.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Investment Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvestmentCountByType

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Investment Count by Waterline Portlet

Donut Chart: Portfolio Investment Count by Waterline

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Investment Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvestmentCountByWaterline

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Investment Count by Work Status Portlet

Donut Chart: Portfolio Investment Count by Work Status.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Investment Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvestmentCountByWorkStatus

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Planned Cost by Goal Portlet

Pie Chart: Portfolio Planned Cost by Goal displays planned cost grouped by goal for portfolio investments.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Goal Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmPlannedCostByGoal

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Planned NPV by Goal Portlet

Use this portlet to view planned NPV grouped by goal for portfolio investments in a bar chart.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Goal Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmPlannedNPVByGoal

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Role Analysis Portlet

Use this portlet to assess health, risk, and role variances for portfolios. Examine target, distributed, and demand amounts for roles in each portfolio. Filter by portfolio, OBS, portfolio plan type, capacity unit type, manager, stakeholder, above waterline, or active setting. The Capacity Unit Type filter allows you to display only portfolios set to hours or FTE on the portfolio properties page.

Note: By default, the Portfolio Plan Type filter is *Portfolio* and the costs and variances are calculated as of the last sync. When you set the filter to *Plan of Record*, the amounts are based on the portfolio plan that is marked as the plan of record. You must have a plan of record on the portfolio for it to appear in the portlet.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Roles tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmRoleAnalysis

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Portfolio Role Demand by Goal Portlet

The Portfolio Role Demand by Goal portlet displays a pie graph showing role demand, grouped by goal, for portfolio investments across portfolios. Filter by portfolio, portfolio plan type, capacity unit type, above waterline, or active setting.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. Click the Goals Analysis tab on the Portfolio Dashboard page.

Standard or Add-in: PMO

Portlet ID: cop.pfmRoleDemandByGoal

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Portfolio Roles Portlet

Use the column chart in this portlet to view the roles for a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolio Dashboard.
2. On the Portfolio Dashboard page, click the Roles tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmRoles

Category: Productivity

Data Provider: Portfolio Provider

Data Provider ID: pfmPortfolioDP

Data Provider Type: System

Posted Transaction Review Portlet

Use this portlet to view financial transactions including quantity, cost, and currency information across investments by transaction date. You can compare transaction currency amounts to converted currency amounts by task and by resource.

Follow these steps:

Open Home and under Financial Management select Posted Transaction Review.

Standard or Add-in: PMO

Portlet ID: cop.finTransactionReview

Category: Productivity

Data Provider: Transaction Review

Data Provider ID: cop.finTransactionReview

Data Provider Type: Query

Posted Transaction Review [Investment Level] Portlet

The Posted Transactions Review portlet at the investment level displays financial transactions for an investment by transaction date and includes quantity, cost, and currency information. Use this portlet to compare transaction currency amounts to converted currency amounts by task and resource.

Important! This portlet references financial transaction data and may result in many rows of data being displayed in the portlet if filters are not applied. You should implement required filters in this portlet so that only reasonable amounts of transactional data are displayed. If you do not do this, then you may experience performance issues.

Follow these steps:

Open Home and under Financial Management select Posted Transaction Review.

Standard or Add-in: PMO

Portlet ID: cop.invTransactionReview

Category: Productivity

Data Provider: Transaction Review

Data Provider ID: cop.finTransactionReview

Data Provider Type: Query

Process Bottlenecks Portlet

Process Bottlenecks displays initiated processes and indicates how long an assigned resource took to respond each milestone.

Note: This portlet is available with the PMO add-in but is not included on any pages. Ask your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.processBottlenecks

Category: Productivity

Data Provider: Process Bottlenecks

Data Provider ID: cop.processBottlenecks

Data Provider Type: Query

Program Manager Cost Dashboard Portlet

Use this portlet to view the cost, progress, and performance of projects in a specific program.

Follow these steps:

1. Open Home and under Personal select General.
2. On the Overview page, click the Program Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.programManagerCostDashboard

Category: Productivity

Data Provider: Program Manager Cost Dashboard

Data Provider ID: cop.programCostDashboard

Data Provider Type: Query

Program Manager Schedule Dashboard Portlet

Use this portlet to view the progress of programs and projects belonging to a program. Default columns display the overall status, schedule completion as a percentage, days late, and a summary Gantt schedule.

Follow these steps:

1. Open Home and under Personal select General.
2. On the Overview page, click the Program Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.programManagerScheduleDashboard

Category: Productivity

Data Provider: Program Manager Schedule Dashboard

Data Provider ID: cop.programScheduleDashboard

Data Provider Type: Query

Project Analysis Portlet

As a program manager, use this portlet to view the projects and tasks that are part of a program. The portlet displays data representing the different projects and change orders currently in progress. Anything that is canceled or completed is not used in the portlet. As a service owner, use this portlet to manage the planned modifications for your services.

Note: This portlet is available with the PMO add-in but is not included on any page. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.projectAnalysis

Category: Productivity

Data Provider: Project Analysis

Data Provider ID: cop.projectAnalysis

Data Provider Type: Query

Project Baselines Portlet

Line Chart: Project Baselines displays baseline activity against the usage or hours worked on the project.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project on the Projects page.
The project Dashboard tab appears.
3. Enable the page layout for this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select Project Default Layout or PMO-Project Status.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.dashboardProjectBaselines

Category: Productivity

Data Provider: Project Baselines

Data Provider ID: cop.dashboardProjectBaselines

Data Provider Type: Query

Project Costs By Phase Portlet

Use this portlet to view cost performance amounts and variances by phase. You can identify the phases of the project plan that exceed baseline costs.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Program Dashboard tab on the Overview page.
3. Expand a cost line item in the [Program Manager Cost Dashboard Portlet](#) (see page 57).

Standard or Add-in: PMO

Portlet ID: cop.projectCostsByPhaseLinkable

Category: Productivity

Data Provider: Project Costs By Phase

Data Provider ID: cop.projectCostsPhaseLinkable

Data Provider Type: Query

Project Costs By Resource Portlet

Use this portlet to view cost performance amounts and variances by resource.

Follow these steps:

1. Open Home and under Personal select General.
2. On the Overview page, click the Program Dashboard tab.
3. Expand a cost line item in the [Program Manager Cost Dashboard Portlet](#) (see page 57).

Standard or Add-in: PMO

Portlet ID: cop.projectCostsByResourceLinkable

Category: Productivity

Data Provider: Project Costs By Resource

Data Provider ID: cop.projectCostsResLinkable

Data Provider Type: Query

Project Costs by Task Portlet

Use this portlet to view cost performance amounts and variances by task. You can identify tasks in the project plan that exceed baseline costs.

Follow these steps:

1. Open Home and under Personal select General.
2. On the Overview page, click the Program Dashboard tab.
3. Expand a cost line item in the [Program Manager Cost Dashboard Portlet](#) (see page 57).

Standard or Add-in: PMO

Portlet ID: cop.projectCostsByTaskLinkable

Category: Productivity

Data Provider: Project Costs by Task

Data Provider ID: cop.projectCostsTaskLinkable

Data Provider Type: Query

Project Cycle Time Analysis Portlet

Use the bar chart in this portlet to view project duration by phase for projects using the same methodology.

Note: This portlet is available with the PMO add-in but is not included on any page. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.projectCycleTimeAnalysis

Category: Productivity

Data Provider: Project Cycle Time Analysis

Data Provider ID: cop.projectCycleTimeAnalysis

Data Provider Type: Query

Project Document Review Portlet

Use this portlet to view project documents, including links to the documents and folder locations.

Note: This portlet is available with the PMO add-in but is not included on any page. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.prjDocumentReview

Category: Productivity

Data Provider: Project Document Review

Data Provider ID: cop.prjDocumentReview

Data Provider Type: Query

Project Indicators Portlet

Use this portlet to view project key performance indicators such as Schedule, Risks, Issues, and Cost Variance.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. On the Projects page, click a project.
The project Dashboard tab appears.
3. Enable the page layout for this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select PMO-Project Status.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.dashboardProjectAlerts

Category: Productivity

Data Provider: Project Indicators

Data Provider ID: cop.dashboardProjectAlerts

Data Provider Type: Query

Project KPIs by OBS Portlet

Use this portlet to display key performance indicators for projects organized by OBS. You can configure the metrics to display. For example, choose Days Late or Projected Cost Variance %.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Sponsor tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.projectKPIHierarchy

Category: Productivity

Data Provider: Project KPIs By OBS

Data Provider ID: cop.projectKPIHierarchy

Data Provider Type: Query

Project Lifecycle Review Portlet

Use this portlet to view the overall status of project phases.

Note: This portlet is available with the PMO add-in but is not included on any pages. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.projectLifeCycleReview

Category: Productivity

Data Provider: Project Life Cycle Review

Data Provider ID: cop.projectLifeCycleReview

Data Provider Type: Query

Project Manager Cost and Effort Dashboard Portlet

Use this portlet to view project cost and effort performance amounts and variances.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Project Dashboard tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.projectManagerCostDashboard

Category: Productivity

Data Provider: Project Manager Schedule Dashboard

Data Provider ID: cop.projectScheduleDashboard

Data Provider Type: Query

Project Manager Schedule Dashboard Portlet

Use this portlet to view projects at a high level with the option of expanding the WBS hierarchy to examine tasks and resource assignments. Default fields include start and finish dates, schedule percent complete, days late, and a Gantt schedule. You can filter by OBS or Project Manager.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Project Dashboard tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.projectManagerScheduleDashboard

Category: Productivity

Data Provider: Project Manager Schedule Dashboard

Data Provider ID: cop.projectScheduleDashboard

Data Provider Type: Query

Project Schedule Portlet

Use this portlet to view a list of projects and a summary Gantt chart. By default, the portlet displays the project type, current risk level, and planned cost.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Sponsor tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.projectsView

Category: Productivity

Data Provider: Project

Data Provider ID: project

Data Provider Type: Object

Resource Utilization Portlet

Use the area chart in this portlet to compare allocations with assignments by month.

Follow these steps:

1. Open Home and under Portfolio Management select Programs.
2. Select a program.

The program Dashboard tab appears.

Standard or Add-in: PMO

Portlet ID: cop.invResourceUtilization

Category: Productivity

Data Provider: Investment Resource Utilization

Data Provider ID: cop.invResourceUtilization

Data Provider Type: Query

Resource Utilization Percentage by Month Portlet

Use the column chart in this portlet to view resource assignments as a percentage of allocations by month.

Note: This portlet is available with the PMO add-in but is not included on any pages. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.invResourceUtilizationPercentage

Category: Productivity

Data Provider: Investment Resource Utilization

Data Provider ID: cop.invResourceUtilization

Data Provider Type: Query

Resource Workloads Portlet

Use this portlet to view the combined allocations across all the investments for the assigned resource by week. Compare the availability with the number of hours that are allocated for a resource by investment.

- Yellow indicates that a resource is allocated at or under availability for the time period.
- Red indicates that a resource is over-allocated (the amount of time booked exceeds resource availability).

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Workloads tab on the Resource Planning page.
3. (Optional) Use the Time-Scaled Value option to change the time period to bi-weekly, monthly, or quarterly.

Standard or Add-in: Standard

Portlet ID: projmgr.resourceWorkloads

Category: Resource

Data Provider: Resources with Aggregation

Data Provider ID: resourceAggregate

Data Provider Type: System

Rights by License Type Portlet

As an administrator, use this portlet to view the descriptions and license types for each access right. For example, the Resource - Create right belongs to the Manager license. The Resource - Enter Time access right belongs to the Team Member license.

Follow these steps:

Open Administration and under Organization and Access select License Information.

Standard or Add-in: Standard

Portlet ID: rightsbylicensetype

Category: Business Intelligence

Data Provider: Rights by License Type

Data Provider ID: Not applicable.

Data Provider Type: System

Risk Management Portlet

Risk Management displays a list of risks associated to projects.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the Risks, Issues, and Changes tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.riskManagement

Category: Productivity

Data Provider: Risk Management

Data Provider ID: cop.riskManagement

Data Provider Type: Query

Role Capacity Portlet

Use this portlet to view the overall demand against resource capacity across all investments organized by role and month. Use the role capacity capabilities to view the ability of your organization to take on additional work. Compare total demand and total capacity for each role. You can also consider resources that you plan to hire. For example, if planned hires do not actually get hired, you can exclude these resources to view their impact on role capacity.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Capacity tab.
3. Click the Expand Filter icon in the toolbar and select your options. For example, select a value in the Include To-be-hired Resources field.

Standard or Add-in: Standard

Portlet ID: projmgr.roleCapacity

Category: Resource

Data Provider: Roles with Resource Aggregation

Data Provider ID: roleAggregate

Data Provider Type: System

Role Capacity and Demand Portlet

Use this portlet to view the distributed target capacity and role demand by month for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Capacity tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvRoleCapacityDemand

Category: Productivity

Data Provider: Portfolio Role Capacity and Demand

Data Provider ID: pfm_rolecap_demand

Data Provider Type: System

Role Capacity and Demand Histogram Portlet

Use this portlet to view a histogram of distributed target capacity and role demand by month, and in total, for investments in a portfolio. You can view portfolio roles from the Targets tab and unplanned Other Roles which are allocated to portfolio investments but not included in targets.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio.
3. Click the Capacity tab.
4. Personalize the Capacity tab to include the Role Capacity and Demand Histogram portlet.
5. Map the Above Waterline filter attribute to the Above Waterline mapping field on the Page Filters tab.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvRoleCapacityDemandHistogram

Category: Productivity

Data Provider: Portfolio Role Capacity and Demand

Data Provider ID: pfm_rolecap_demand

Data Provider Type: System

Role Capacity Histogram Portlet

Use this portlet to view the overall demand against capacity for roles across all investments. The information is aggregated by role and is organized for each month and grouped by quarter. Compare total demand and total capacity for each role with data stacked vertically in each month's column. Yellow indicates demand and red indicates where demand exceeds role capacity.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. On the Resource Planning page, click the Capacity tab.

Standard or Add-in: Standard

Portlet ID: projmgr.roleCapacityHistogram

Category: Resource

Data Provider: Roles with Resource Aggregation

Data Provider ID: roleAggregate

Data Provider Type: System

Role Demand by Goal Portlet

Use the pie chart in this portlet to view role demand grouped by goal for investments in a portfolio. Each slice represents the proportional role demand by goal. To view the total role demand amount, position your mouse over a slice.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio on the Portfolios page.
3. Click the Analysis tab on the Portfolio page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvRoleDemandByGoal

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Role Demand by Waterline Portlet

Use the pie chart in this portlet to view role demand grouped by waterline for investments in a portfolio.

Follow these steps:

1. Open Home and under Portfolio Management select Portfolios.
2. Click a portfolio on the Portfolios page.
3. Click the Analysis tab on the Portfolio page.

Standard or Add-in: PMO

Portlet ID: cop.pfmInvRoleDemandByWaterline

Category: Productivity

Data Provider: Portfolio Investment Provider

Data Provider ID: pfm_investment

Data Provider Type: System

Schedule and Progress Portlet

Use the bubble chart in this portlet to view the score of each project in terms of its scheduled variance and current finish date. Each bubble on the graph represents a project associated with the selected program. Rolling your cursor over a bubble in the graph displays project details such as the name, finish date, schedule %, and planned cost. Changing a project planned cost changes its bubble size. Clicking a bubble opens the project dashboard.

Follow these steps:

1. Open Home and under Portfolio Management select Programs.
2. Select a program.

The program Dashboard tab appears.

Standard or Add-in: PMO

Portlet ID: cop.prt.prjReview

Category: Productivity

Data Provider: Schedule and Progress

Data Provider ID: cop.qry.prjReview

Data Provider Type: Query

Schedule Performance Portlet

Use this portlet to view the number of tasks categorized as critical late, past due, scheduled late, or on schedule. You can filter the data by OBS or Project Manager and adjust the range of days (Days Outlook) from a starting point (As of Date).

The Schedule Performance portlet displays the number of late tasks categorized as critical late, past due, or scheduled late within the next 45 days (default) or number of days entered in the Days Outlook filter. Portlet filters include: OBS, Manager, As of Date, and Days Outlook.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the PM Alerts tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.prt.schedulePerformance

Category: Productivity

Data Provider: Schedule Performance

Data Provider ID: cop.qry.schedulePerformance

Data Provider Type: Query

Schedule Performance Details Portlet

Use this portlet to view a list of the critical late, past due, or scheduled late tasks within the next 45 days by default. You can adjust the number of days in the Days Outlook filter. Filter by project, task, Finish Date, As of Date, and Days Outlook. You can also click projects or tasks in the portlet to open them.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the PM Alerts tab on the Overview page.
3. Click a column in the Schedule Performance portlet.

The Schedule Performance Drill Down page appears.

Standard or Add-in: PMO

Portlet ID: cop.schedulePerformanceLinkable

Category: Productivity

Data Provider: Schedule Performance Details

Data Provider ID: cop.scheduleLinkable

Data Provider Type: Query

Site Links Portlet

Use this portlet to access the predefined links recognized by your project team. As an administrator, use this portlet to store one or more links that appear for all users. The links can be to external web sites, to intranet sites, or to other pages in CA Clarity PPM.

Follow these steps:

1. As a user, to view the links in this portlet, open Home and under Personal select General.
2. As an administrator, to add or remove these global links, open Administration and select Site Links under General Settings.

Standard or Add-in: Standard

Portlet ID: personal.siteLinks

Category: Collaboration

Data Provider: Not applicable

Data Provider ID: Not applicable

Data Provider Type: Not applicable

Staffing Portlet

Use this portlet to view the number of unstaffed ETC hours by project. The hours represent tasks with a known role but no assigned resource. You can filter the data by OBS or Project Manager and adjust the range of days (Days Outlook) from a starting point (As Of Date).

Follow these steps:

1. Open Home and under Personal select General.
2. Click the PM Alerts tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.prt.staffing

Category: Productivity

Data Provider: Staffing

Data Provider ID: cop.qry.staffing

Data Provider Type: Query

Staffing Details Portlet

Use this portlet to view a list of unstaffed project roles for a selected project in the *days outlook* range.

Follow these steps:

1. Open Home and under Personal select General.
2. Click the PM Alerts tab on the Overview page.

Standard or Add-in: PMO

Portlet ID: cop.staffingLinkable

Category: Productivity

Data Provider: Staffing Details

Data Provider ID: cop.staffingLinkable

Data Provider Type: Query

Status Report Indicators Portlet

Use this portlet to view the most recent status report values for a project.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project.

The project Dashboard tab appears.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select PMO-Project Status.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.prt.prjStatusReport

Category: Productivity

Data Provider: Status Report Indicators

Data Provider ID: cop.qry.prjStatusReport

Data Provider Type: Query

Status Report Listing Portlet

Use this portlet to view the status of projects indicated by a series of color-coded icons and the Status Report Update text from status reports. By default, the portlet displays the manager, report date, status, and updated text. Click the updated text to view the full status report. The icons include schedule, scope, cost and effort, and overall status. You can filter by OBS or Project Manager.

Follow these steps:

1. Open Home, and under Dashboards, click Status Report Review.
2. Click the Status Report Listing tab on the Status Report Review page.

Standard or Add-in: PMO

Portlet ID: cop.prjStatusReportListing

Category: Productivity

Data Provider: Status Report Listing

Data Provider ID: cop.prjStatusReportListing

Data Provider Type: Query

Subprojects Portlet

Use this portlet to view a list of the subprojects for a project. The portlet includes the stoplights for subproject status and schedule.

Note: This portlet is not placed anywhere as part of the standard product. It can be added to a Project Dashboard page.

Standard or Add-in: Standard

Portlet ID: project.Subprojects

Category: Project

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Team Capacity Portlet

Use this area chart portlet to compare the team allocation capacity and the assignment demand on a project.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project.
The Dashboard tab appears.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select PMO-Project Storyboard.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: PMO

Portlet ID: cop.teamCapacityLinkable

Category: Productivity

Data Provider: Team Capacity

Data Provider ID: cop.teamCapacityLinkable

Data Provider Type: Query

Team Member Task Summary Portlet

Use this portlet to view resource assignments, ETC, pending actuals, and actuals for project tasks.

Note: This portlet is available with the PMO add-in but is not included on any pages. Contact your administrator or use Studio to add this portlet.

Standard or Add-in: PMO

Portlet ID: cop.teamMemberOrganizer

Category: Productivity

Data Provider: Team Member Organizer

Data Provider ID: cop.teamMemberOrganizer

Data Provider Type: Query

Team Utilization Portlet

Displays the team-based utilization for the current project. Provides a detailed picture of total usage vs. allocation.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. On the Projects page, click a project.
The project Dashboard tab appears.
3. Enable the page layout that displays this portlet if it does not appear:
 - a. Click the Properties tab drop-down menu, select Main, and under Properties select General.
 - b. In the Page Layout field, select Project Default Layout or PMO-Project Status.
 - c. Click Save.
 - d. Click the Dashboard tab.

Standard or Add-in: Standard

Portlet ID: projmgr.teamUtilization

Category: Project

Data Provider: Team Allocations

Data Provider ID: teams

Data Provider Type: System

Timesheet Notes Portlet

Timesheet Notes lists notes attached to timesheet entries.

Follow these steps:

1. Open Home and under Resource Management select Timesheet Overview.
2. Click the arrow icon in the Timesheet Details column of the Investment Timesheet Summary portlet.

The Investment Timesheet Review portlet appears on the Timesheet Details page.

3. Click the checkmark in the Notes Attached column in a row that represents a timesheet with optional notes.

Standard or Add-in: PMO

Portlet ID: cop.invTimesheetNotesLinkable

Category: Productivity

Data Provider: Timesheet Notes

Data Provider ID: cop.invTimesheetNotesLinkable

Data Provider Type: Query

Timesheet Review [Investment Level] Portlet

Timesheet Review displays pending and posted actuals for a single project by task, resource, and time period with a notes drill down.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Click a project on the Projects page.
3. Click the Team tab on the Project page.
4. Click the Actions drop-down menu and under Views select Timesheet Review.
5. (Optional) Click the check mark icon in the Notes Attached column to view the Timesheet Notes portlet.
6. (Optional) Click the clock icon in the Timesheet column to open the timesheet. Click the note icon to view or add a timesheet note.

Standard or Add-in: PMO

Portlet ID: cop.invTimeReview

Category: Productivity

Data Provider: Timesheet Review

Data Provider ID: cop.invTimeReview

Data Provider Type: Query

Timesheets to Approve Portlet

As a resource manager, use this portlet to view the timesheets that are awaiting your approval.

Follow these steps:

1. Open Home and under Personal select General.
2. (Optional) Click the More link to filter your view of the Timesheets page.

Note: This portlet is not placed anywhere as part of the standard product. You can add it to any page; for example, the Overview page.

Standard or Add-in: Standard

Portlet ID: projmgr.timesheetAdmin

Category: Resource

Data Provider: Not applicable.

Data Provider ID: Not applicable.

Data Provider Type: System

Top Down Planning by Investment Portlet

Use this portlet to view resource allocation and capacity by investment for the time periods that you specify. This portlet lists the resources and roles for each investment and shows the allocation by month for each resource. You can edit the resources and allocations for each investment.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Top Down Planning tab on the Resource Planning page.

Standard or Add-in: Standard

Portlet ID: projmgr.topDownPlanning

Category: Resource

Data Provider: Team Allocations

Data Provider ID: teams

Data Provider Type: System

Unfilled Requirements Portlet

Use this portlet to examine the unfilled allocations for a set of investments listed by requirement and role. The portlet displays roles that are booked to investments. The roles represent demand in the organization. Typically, named resources replace roles as part of staffing activities.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Unfilled Allocations tab on the Resource Planning page.

Standard or Add-in: Standard

Portlet ID: projmgr.unfilledAllocations

Category: Resource

Data Provider: Team Allocations

Data Provider ID: teams

Data Provider Type: System

Upcoming Milestones Portlet

Use this portlet to view milestones, schedule indicators, and a Gantt chart for a project.

Follow these steps:

1. Open Home and under Portfolio Management select Projects.
2. Select a project.

The project Dashboard tab appears.

Standard or Add-in: PMO

Portlet ID: cop.prt.prjMilestones

Category: Productivity

Data Provider: Upcoming Project Milestones

Data Provider ID: cop.qry.prjMilestones

Data Provider Type: Query

User Count by License Type Portlet

Use this portlet to view the total number of users for each type of license.

Follow these steps:

Open Administration and under Organization and Access select License Information.

Standard or Add-in: Standard

Portlet ID: usercountbylicensetype

Category: Business Intelligence

Data Provider: User Count by License Type

Data Provider ID: Not applicable.

Data Provider Type: System

Weekly Detail Portlet

Use this portlet to view allocated hours by week for each resource. As a resource manager, use this information to assign work to individual resources and confirm that they are allocated appropriately.

Note: Portlet data only appears after you allocate resources to projects.

Follow these steps:

1. Open Home and under Resource Management select Resource Planning.
2. Click the Allocations tab on the Resource Planning page.
3. Examine the Weekly Detail histogram colors to identify allocations:
 - Yellow. Indicates that the resource is allocated at or under availability for that time period.
 - Red. Indicates that the resource is over-allocated for that time period.
 - Green. Indicates actuals recorded by the resource for that time period. Only posted actuals appear in the chart. If no actuals have been posted, no actuals appear in the chart.
4. To view a note summarizing the allocation and availability of a resource for that period, scroll over the histogram for each week. Use the note to compare the availability of a resource with actual allocation for that period.
5. When a resource is overbooked, edit allocations to reduce the amount of time the resource is scheduled to work on an investment.

Standard or Add-in: Standard

Portlet ID: projmgr.weeklyDetail

Category: Resource

Data Provider: Team Allocations

Data Provider ID: teams

Data Provider Type: System