

# CA Clarity™ PPM

## Portlet Reference Guide

Release 13.3.00



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# Chapter 1: CA Clarity PPM Portlets

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## Introduction

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: CA Clarity PPM Portlets (Listed by Role)

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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 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:

- [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)
- [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)
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- [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)
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- [Portfolio Costs Portlet](#) (see page 50)
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- [Portfolio Investment Count by Waterline Portlet](#) (see page 52)
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- [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:

- [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)
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- [Posted Transaction Review \[Investment Level\] Portlet](#) (see page 56)
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- [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)
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- [Project Costs by Task Portlet](#) (see page 60)

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- [Project Schedule Portlet](#) (see page 64)
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- [Schedule and Progress Portlet](#) (see page 70)
- [Schedule Performance Portlet](#) (see page 71)
- [Schedule Performance Details Portlet](#) (see page 71)
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- [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)
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- [Team Capacity Portlet](#) (see page 75)
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- [Weekly Detail Portlet](#) (see page 80)

## 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)
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## Chapter 3: CA Clarity PPM Portlets (Listed by Name)

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[Weekly Detail Portlet](#) (see page 80)

## 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 is charged 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



## 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 Issues and Risks 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) Expand and 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 estimates 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 Issues and Risks 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. Compare total demand and total capacity for each role. Consider planned but yet-to-be hired resources. For example, if planned hires do not actually get hired, you can exclude these resources to view the difference they cause in role capacity. Click the Expand Filter icon from the toolbar and select an option in the Include To-be-hired Resources field.

**Follow these steps:**

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

**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 finish date.

**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.

**Standard or Add-in:** Standard

**Portlet ID:** projmgr.weeklyDetail

**Category:** Resource

**Data Provider:** Team Allocations

**Data Provider ID:** teams

**Data Provider Type:** System