

caWorld¹⁰

hands-on lab: personal dashboarding in CA ClarityTM PPM

Session # PP503LR

Focus Area Project & Portfolio Management



- Personal Dashboarding, new in the latest release of CA Clarity PPM, is the powerful functionality you will want to get your hands on!
- This hands-on lab will enable participants to see how Personal Dashboarding allows Clarity users to quickly and easily create their own dashboards and export them to PowerPoint or Excel for reporting.
- In this lab you will:
 - learn how CA Clarity PPM Administrators can create Personal Dashboards and share them with CA Clarity PPM users
 - learn how CA Clarity PPM users can create their own dashboards and embed their own personally created portlets
 - understand the security privileges required to use Personal Dashboarding.
- This hands-on lab is designed for CA Clarity PPM users and administrators implementing 12.0.5 +.

agenda

- Personal Dashboarding Overview
- Walkthrough Demo Lab
- Best Practices
- Q&A

overview

Personal Dashboarding...

- Bridges the gap between IT and the business. You now have a way for end users to create their own personal portlets and dashboards which are tailored to meet their business needs without having to go through their Clarity Admin.
- Enables better collaboration. Share your dashboards with other users online and export the content to Excel or PowerPoint.











What can you do with Personal Dashboarding?

- Configure portlets using stock and *existing* custom data providers.
 - *Users cannot create HTML portlets or create their own data providers
- Create dashboards with or without tabs and add custom portlets using the drag-n-drop portlet layout designer
- Share a dashboard with specific resources, groups or OBS
- Allow other end-users to personalize the shared dashboard by giving them the “manager” role.
 - *If you publish your dashboard after it has been shared it will push those changes out and overwrite any personalizations. The same way Studio works now.

Dashboard Managers...

- The user who creates the dashboard will automatically become the “Dashboard Manager”
- The Dashboard Managers are the only users who can change the dashboard details/properties, content and publish/reset the dashboard
- Dashboard Managers are also the only ones who can share a dashboard and assign other users “Viewer” or “Manager” access

Dashboard functions and roles...

| Function | Studio Administrator | Dashboard Manager | Dashboard Viewer |
|---------------------------|---|---|---|
| Share a Dashboard |  |  | |
| Edit Dashboard properties |  |  | |
| Publish Dashboard |  |  | |
| Personalize Dashboard | |  |  |
| Export Dashboard | |  |  |

Security Rights...

| Administration Security Right | End-user Application Access | Scope |
|-------------------------------|---|-------------------------|
| Dashboard – Navigate * | “Dashboard” navigation link | Global |
| Portlet – Navigate * | “Portlet” navigation link | Global |
| Dashboard – Create * | Create end-user dashboards | Global |
| Portlet – Create * | Create end-user portlets | Global |
| Portlet Definition Editor | Edit access to a portlet | Global/OBS/ Instance |
| Portlet - View | View access to a portlet | Global/OBS/ Instance |
| Page Definition Editor | Dashboard Manager access to a dashboard | Global/OBS/ Instance |
| Page – View | Dashboard View access to a dashboard | Global/OBS/ Instance |

* New rights for 12.0.5

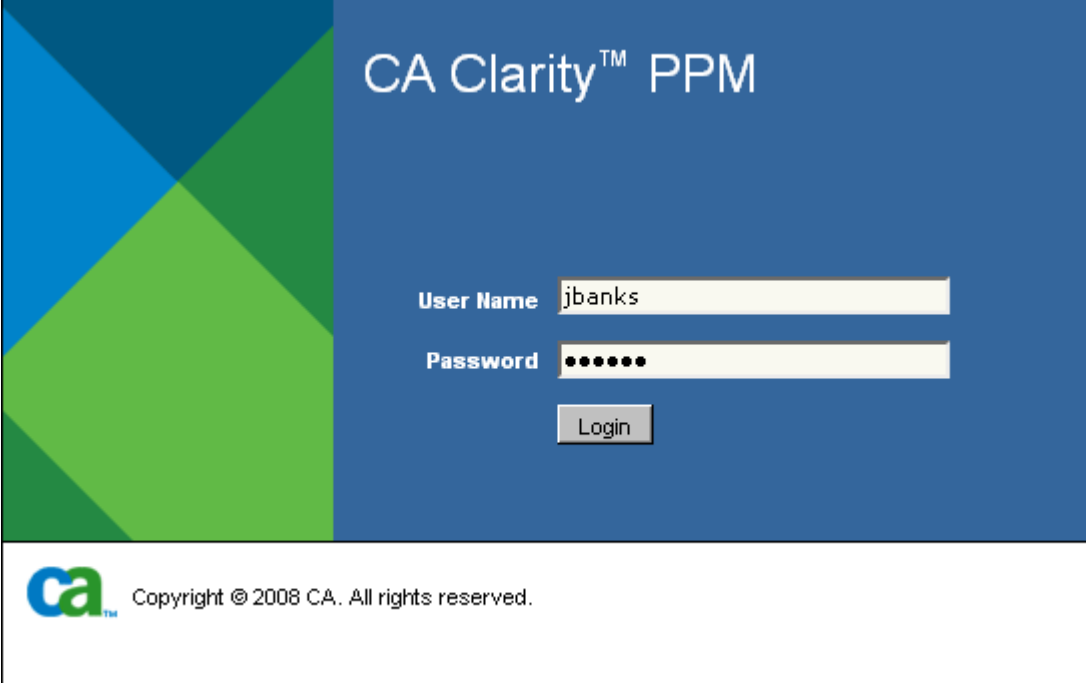
lab demo

lab demo

Let's login as a dashboard creator...

Login: jbanks

Password: jbanks




The image shows the login interface for CA Clarity PPM. The background is a solid blue color. On the left side, there is a decorative graphic consisting of several overlapping triangles in shades of blue and green. The text "CA Clarity™ PPM" is displayed in white in the upper right area. Below this, there are two input fields: "User Name" with the text "jbanks" entered, and "Password" with a series of black dots. A "Login" button is positioned below the password field. At the bottom left, the CA logo is visible, followed by the copyright notice "Copyright © 2008 CA. All rights reserved."

CA Clarity™ PPM

User Name

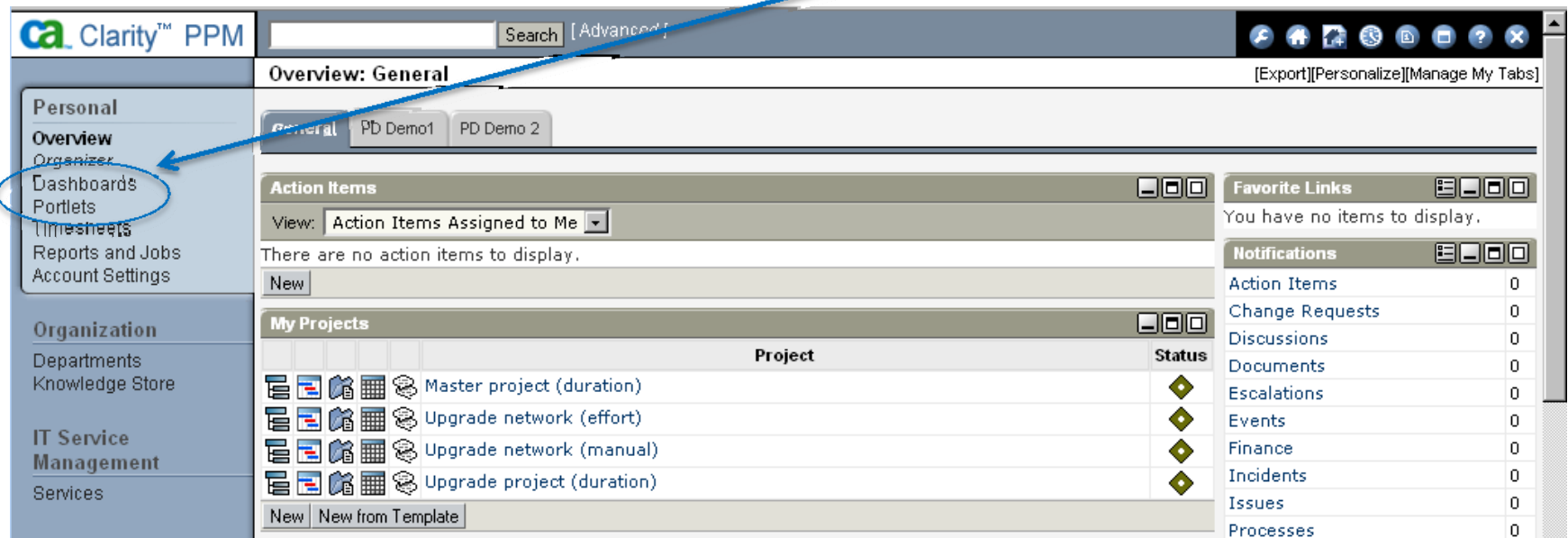
Password

Login

 Copyright © 2008 CA. All rights reserved.

lab demo

Note the new navigation items available once you have the personal dashboard and portlet rights assigned – click on the “Dashboards” link...



The screenshot shows the CA Clarity PPM web application interface. The left navigation menu is visible, with the 'Dashboards' link highlighted by a blue circle and a blue arrow pointing to it. The main content area displays the 'Overview: General' page, which includes sections for 'Action Items', 'My Projects', 'Favorite Links', and 'Notifications'. The 'Action Items' section shows 'View: Action Items Assigned to Me' and 'There are no action items to display.' The 'My Projects' section shows a table of projects with columns for 'Project' and 'Status'. The 'Favorite Links' section shows 'You have no items to display.' The 'Notifications' section shows a list of notifications with counts.

| Project | Status |
|----------------------------|--------|
| Master project (duration) | ◆ |
| Upgrade network (effort) | ◆ |
| Upgrade network (manual) | ◆ |
| Upgrade project (duration) | ◆ |

| Notification | Count |
|-----------------|-------|
| Action Items | 0 |
| Change Requests | 0 |
| Discussions | 0 |
| Documents | 0 |
| Escalations | 0 |
| Events | 0 |
| Finance | 0 |
| Incidents | 0 |
| Issues | 0 |
| Processes | 0 |

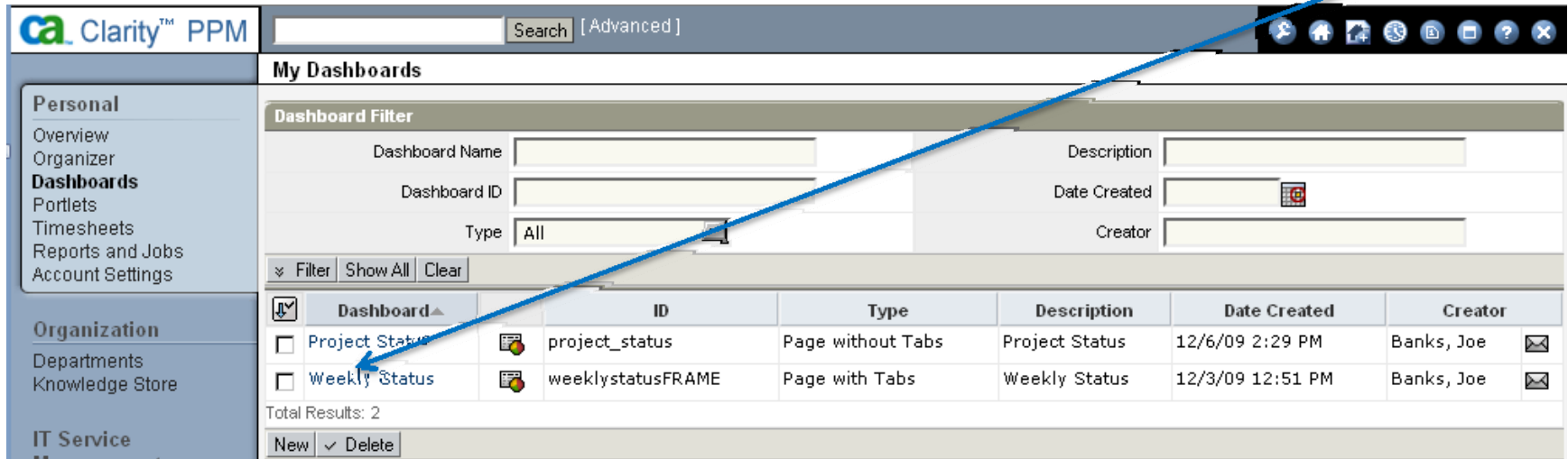
lab demo

Creating a new dashboard is quite simple. Click “New”, fill in the required fields then click “Submit”...

The screenshot displays the CA Clarity PPM interface. On the left is a navigation menu with sections: Personal (Overview, Organizer, **Dashboards**, Portlets, Timesheets, Reports and Jobs, Account Settings), Organization (Departments, Knowledge Store), and IT Service Management. The main content area is titled 'My Dashboards' and includes a 'Dashboard Filter' section with fields for 'Dashboard Name', 'Dashboard ID', and a 'Type' dropdown set to 'All'. Below the filter are buttons for 'Filter', 'Show All', and 'Clear'. A table lists existing dashboards: 'Project Status' and 'Weekly Status', both with checkboxes. Below the table, it says 'Total Results: 2' and has 'New' and 'Delete' buttons. A blue arrow points from the 'New' button to the 'Create Dashboard' form on the right. The 'Create Dashboard' form has fields for 'Dashboard Name' (containing 'My New Dashboard'), 'Dashboard ID' (containing 'new_dash'), and a 'Description' text area. It also has a 'Type' dropdown set to 'Page without Tabs' and a checked 'Personalizable' checkbox. At the bottom are 'Submit' and 'Cancel' buttons. A legend at the bottom right explains the field markers: '*' for Required, '+' for Enter Once, and '#' for Unique. Another blue arrow points from the 'Submit' button back to the 'New' button in the table.

lab demo

For our lab however, we will be using two personal dashboards which have already been created. Click on the tabbed dashboard page “Weekly Status”...



The screenshot shows the 'My Dashboards' section of the CA Clarity PPM interface. On the left is a navigation menu with 'Personal' (Overview, Organizer, **Dashboards**, Portlets, Timesheets, Reports and Jobs, Account Settings), 'Organization' (Departments, Knowledge Store), and 'IT Service Management'. The main area has a 'Dashboard Filter' section with fields for Dashboard Name, ID, Type (set to 'All'), Description, Date Created, and Creator. Below the filter is a table of dashboards. A blue arrow points to the 'Weekly Status' dashboard in the table.

| <input checked="" type="checkbox"/> | Dashboard | ID | Type | Description | Date Created | Creator |
|-------------------------------------|----------------|-------------------|-------------------|----------------|------------------|------------|
| <input type="checkbox"/> | Project Status | project_status | Page without Tabs | Project Status | 12/6/09 2:29 PM | Banks, Joe |
| <input type="checkbox"/> | Weekly Status | weeklystatusFRAME | Page with Tabs | Weekly Status | 12/3/09 12:51 PM | Banks, Joe |

Total Results: 2

New ☒ Delete

lab demo

You are now in “design” view. Note the tabs on the left – click on each to view the portlets which have been added. When ready, return to the “Summary” tab and click on the “View Dashboard” link...

Search [Advanced]

Dashboard: Details (Dashboard: Weekly Status) [View Dashboard][Export][Sharing]

General

* Dashboard Name Weekly Status

* + Dashboard ID weeklstatusFRAME

Allow End Users to Add Tabs ☒

Export ☒ Fit to Page ☒ One Portlet per Slide/Sheet

Description Weekly Status

Tabs: Content and Layout

Summary
Resources
Timesheets
Projects

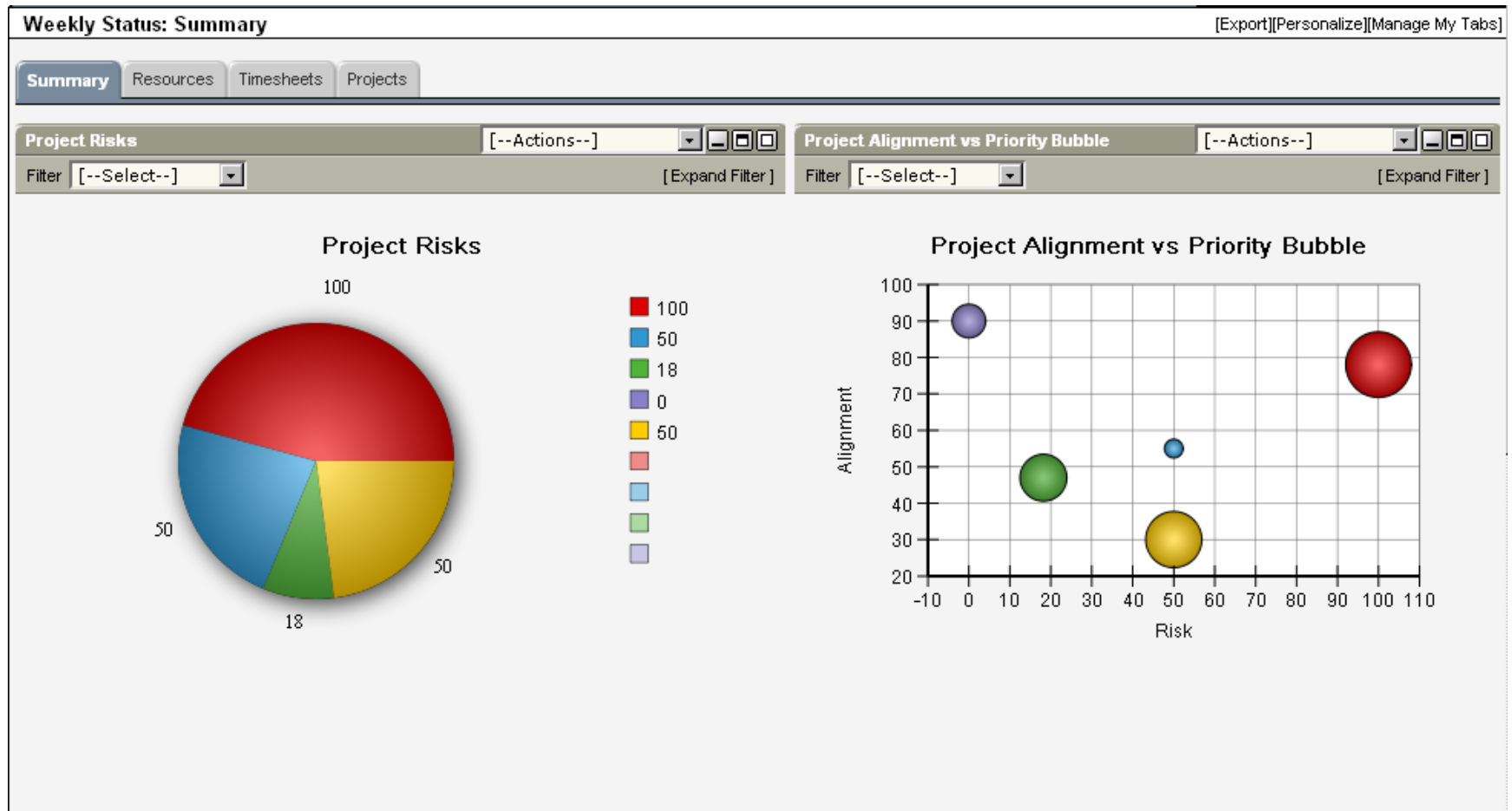
Project Risks

Project Alignment vs Priority Bubble

Save Delete Publish Cancel

lab demo

Click on each of the tabs to view all the existing portlets...



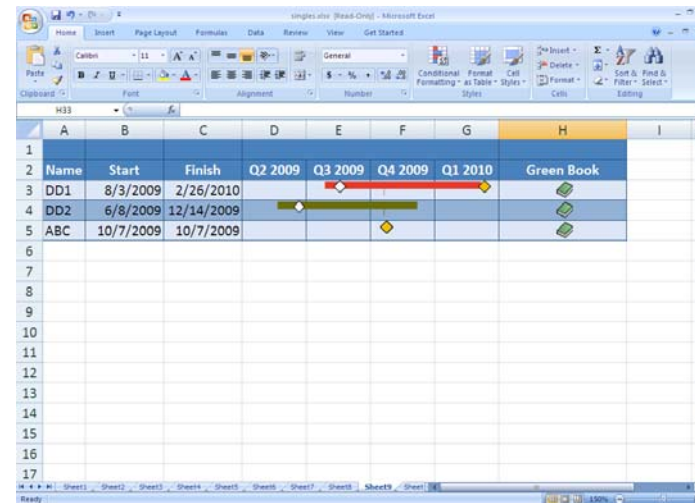
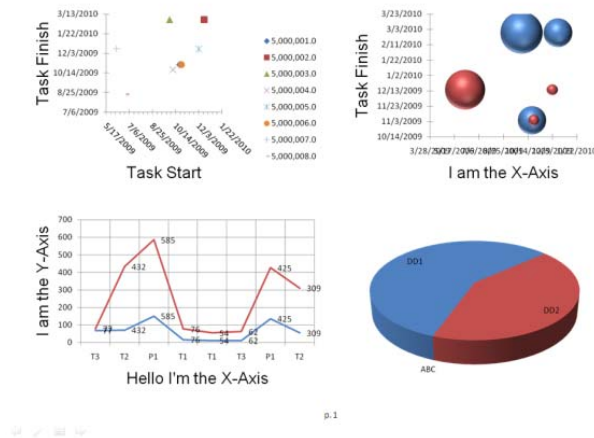
lab demo

You have the capability to export a grid or graph portlet to Excel or PowerPoint

Export Options:

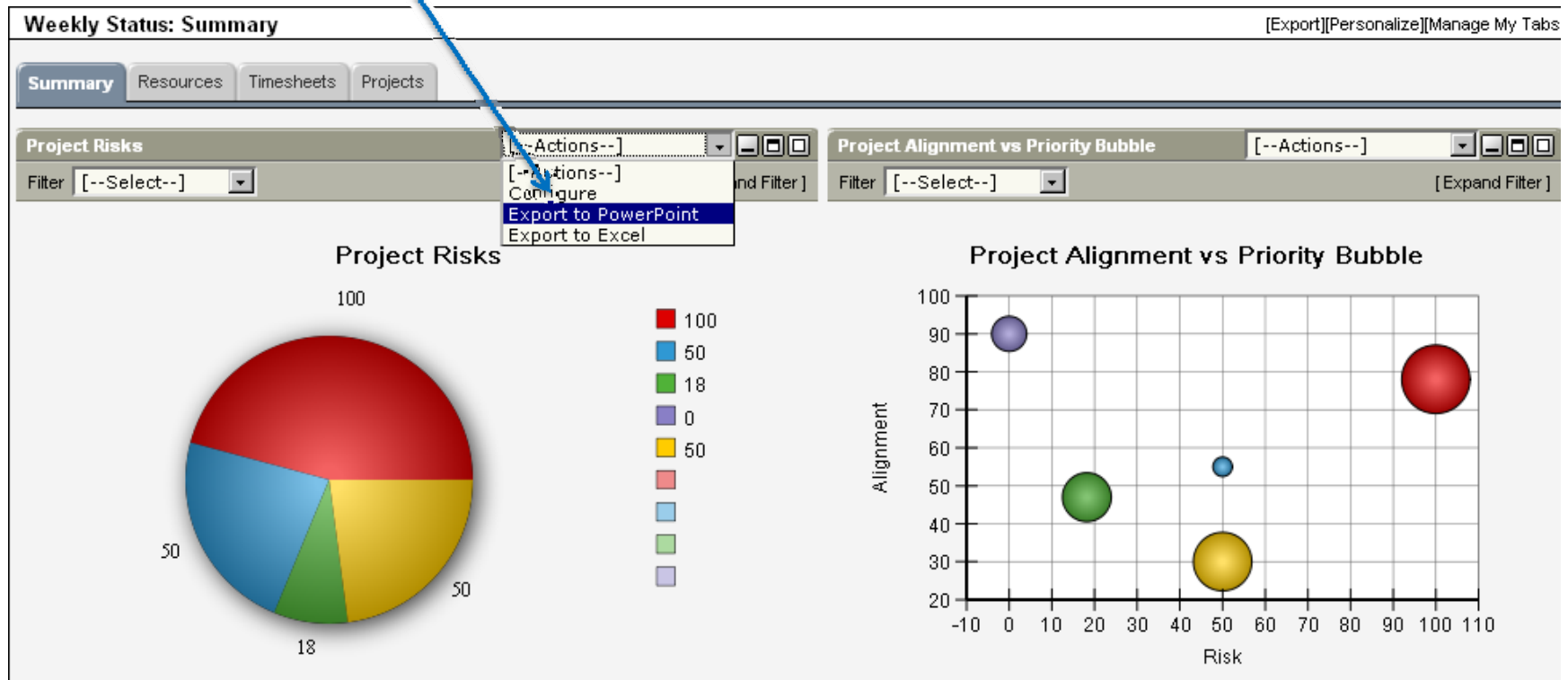
- Fit to Page
- One Portlet per Page/Worksheet

Graphs are displayed in the native MS Office chart format



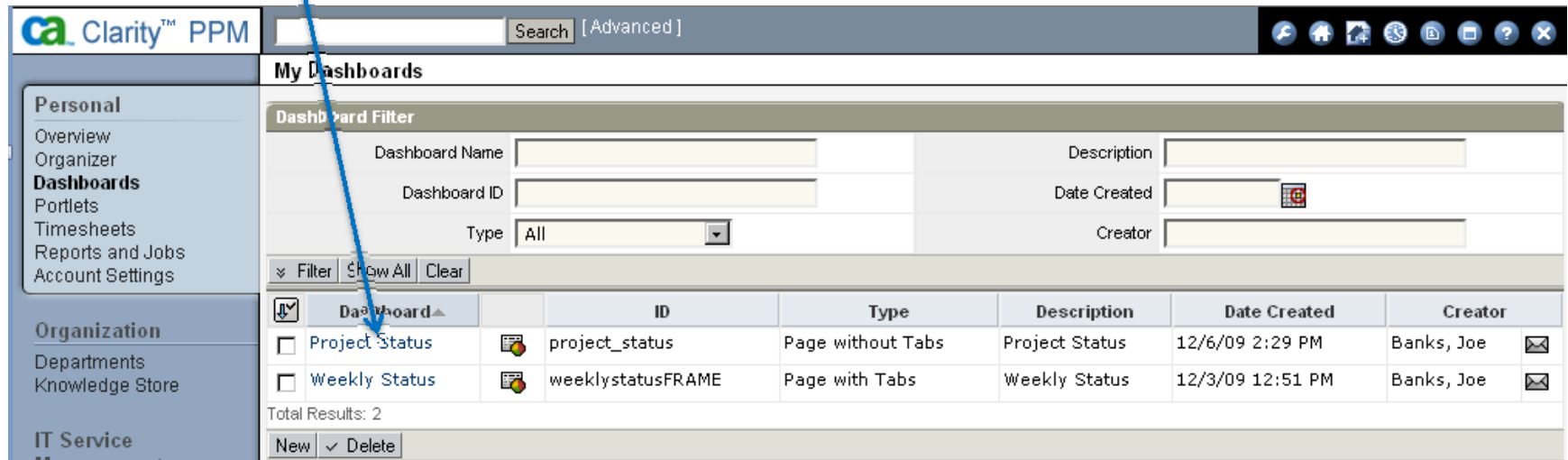
lab demo

Let's give this a try with a graph portlet... navigate back to the summary tab and choose "Export to Powerpoint". Now try it again with "Export to Excel"



lab demo

Navigate back to the dashboards link and let's view the page without tabs... "Project Status"



The screenshot shows the 'My Dashboards' page in the Clarity PPM application. The left sidebar contains navigation links for Personal, Organization, and IT Service Management. The main content area features a 'Dashboard Filter' section with input fields for Dashboard Name, Dashboard ID, Description, Date Created, and a dropdown for Type (set to 'All'). Below the filter is a table listing dashboards. The 'Project Status' dashboard is highlighted, and a blue arrow points to its link. The table also includes a 'Weekly Status' dashboard. At the bottom, there are buttons for 'New' and 'Delete'.

| <input checked="" type="checkbox"/> | Dashboard | ID | Type | Description | Date Created | Creator |
|-------------------------------------|--------------------------------|-------------------|-------------------|----------------|------------------|------------|
| <input type="checkbox"/> | Project Status | project_status | Page without Tabs | Project Status | 12/6/09 2:29 PM | Banks, Joe |
| <input type="checkbox"/> | Weekly Status | weeklystatusFRAME | Page with Tabs | Weekly Status | 12/3/09 12:51 PM | Banks, Joe |

Total Results: 2

[New](#) [Delete](#)

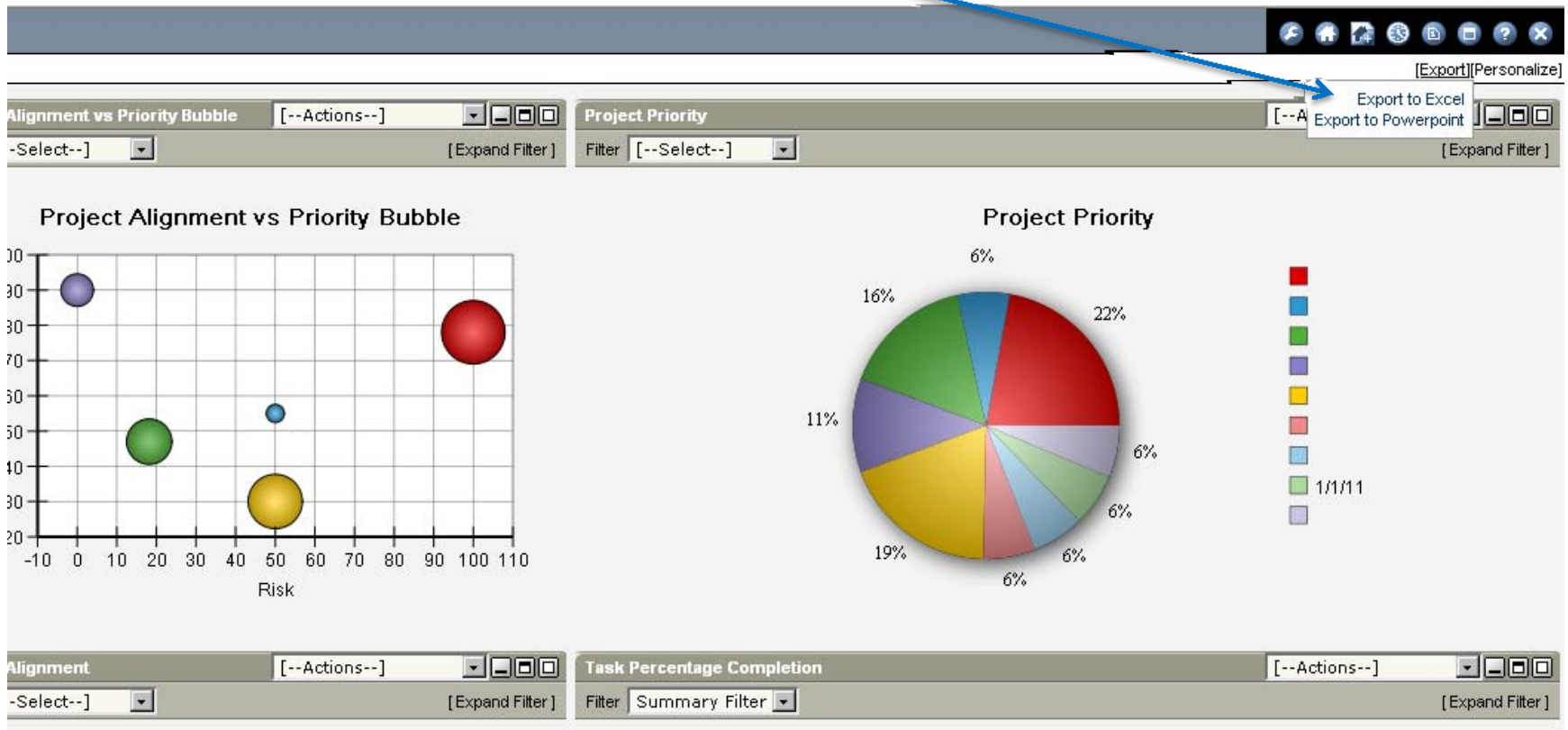
lab demo

In this dashboard, we have all our portlets on one page... what will it look like if we chose to export the entire dashboard? Click “View

The screenshot shows the CA Clarity PPM interface. On the left is a navigation sidebar with categories: Personal (Overview, Organizer, Dashboards, Portlets, Timesheets, Reports and Jobs, Account Settings), Organization (Departments, Knowledge Store), IT Service Management (Services), Portfolio Management (Portfolios, Programs, Projects, Applications, Assets, Products, Other Work), and Requirements Planning (Release Planning, Releases, Requirements). The main content area is titled 'Dashboard: Details (Dashboard: Project Status)'. It has a search bar and a toolbar with icons for home, search, and other functions. A blue arrow points from the text 'Click “View’ to the 'View Dashboard' link in the top right. The 'General' section contains fields for 'Dashboard Name' (Project Status), 'Dashboard ID' (project_status), and 'Description' (Project Status). It also has checkboxes for 'Personalizable' (checked), 'Export' (Fit to Page and One Portlet per Slide/Sheet, both checked). The 'Content and Layout' section shows a grid of portlets: Release Plan Filter, Project Listing, Project Alignment vs Priority Bubble, Project Priority, Project Risks, Project Alignment, Task Percentage Completion, and Project Task Duration. Each portlet contains a placeholder image or chart.

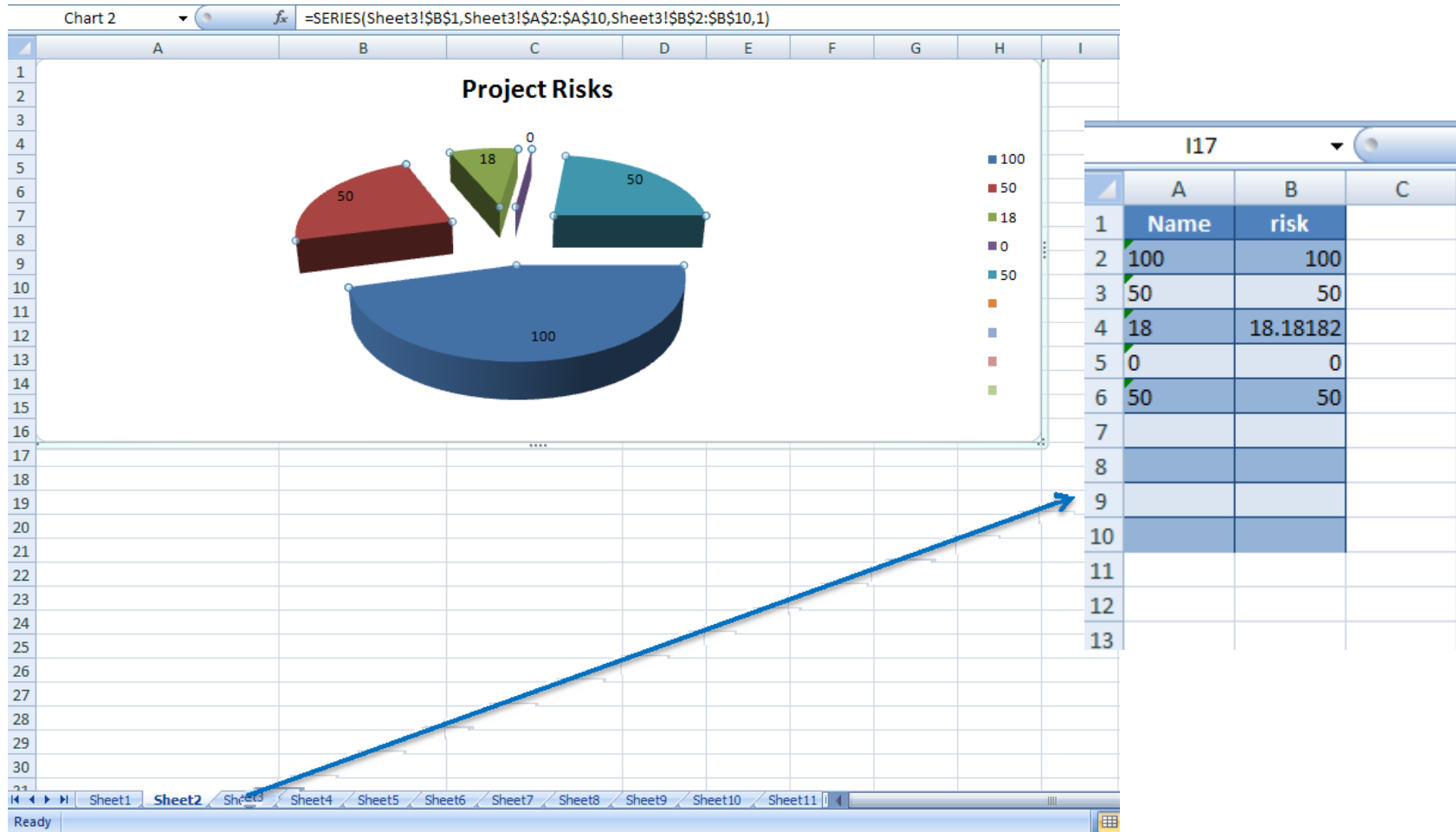
lab demo

Now select “Export to Excel”...



lab demo

As this dashboard was set to display one slide per sheet you will find as many sheets as there are portlets plus the underlying data



lab demo

Return to the dashboard design page and uncheck the “One Portlet per Slide/Sheet option, hit save then select to view the dashboard again and “Export to Excel”

Clarity™ PPM Search [Advanced] [View Dashboard][E]

Dashboard: Details (Dashboard: Project Status)

Personal
Overview
Organizer
Dashboards
Portlets
Timesheets
Reports and Jobs
Account Settings

Organization
Departments
Knowledge Store

IT Service Management
Services

Portfolio Management
Portfolios
Programs
Projects
Applications
Assets
Products
Other Work

Requirements

General

Dashboard Name: Project Status

Dashboard ID: project_status

Personalizable: ☒

Export: ☒ Fit to Page ☐ One Portlet per Slide/Sheet

Description: Project Status

Content and Layout

Release Plan Filter

Project Listing

Project Alignment vs Priority Bubble

Project Priority

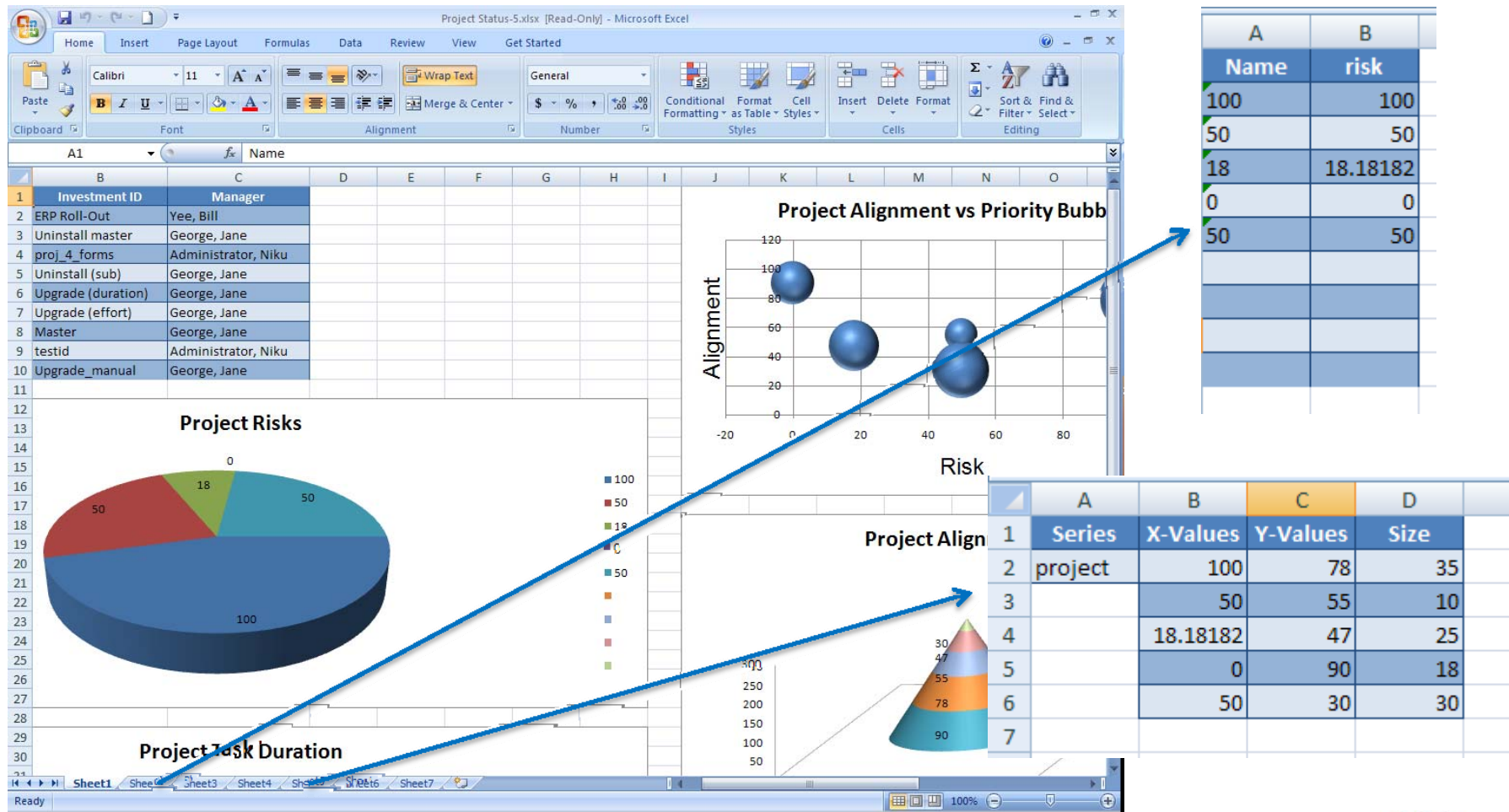
Project Risks

Project Alignment

Task Percentage Completion

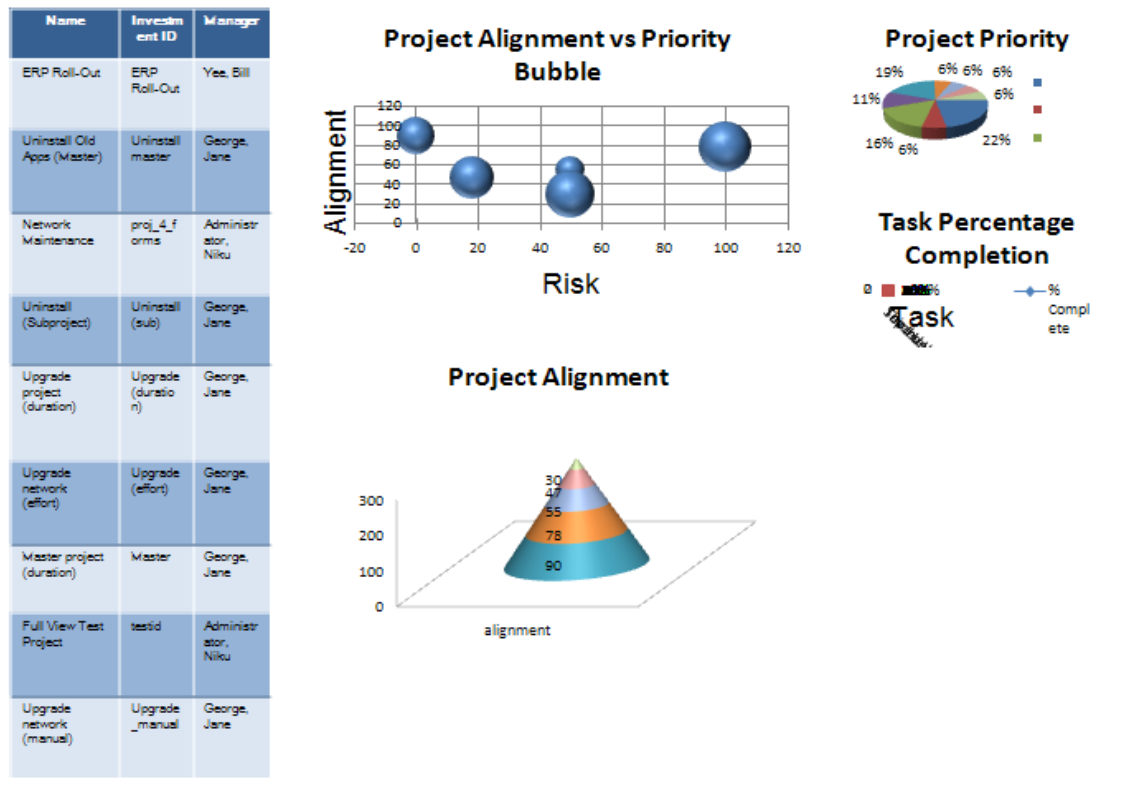
lab demo

You will find that all your portlets are now displaying on one sheet with additional sheets created for the underlying data...



lab demo

If you decide to export to PowerPoint this way, you may need to tailor your dashboard to allow for space limitations. Choose portlets that will fit together nicely within one slide ...



lab demo

Navigate back to the “Weekly Status” dashboard in design mode and let’s add a new portlet to the Projects tab...

Dashboard: Details (Dashboard: Weekly Status) [View Dashboard][Export][Sharing]

General

* Dashboard Name

Weekly Status

* Dashboard ID

weeklstatusFRAME

Allow End Users to Add Tabs

☒

Export

☒ Fit to Page

☒ One Portlet per Slide/Sheet

Description

Weekly Status

Tabs: Content and Layout

Summary

Resources

Timesheets

Projects

Project Task Duration

Save

Delete

Publish

Cancel

* = Required

+ = Enter Once

= Unique

lab demo

Click on the **+** in the content window so we can choose an existing portlet...

Dashboard: Details (Dashboard: Weekly Status) [View Dashboard][Export][Sharing]

General

Dashboard Name: Weekly Status

Dashboard ID: weeklystatusFRAME

Allow End Users to Add Tabs: ☒

Export: ☒ Fit to Page ☒ One Portlet per Slide/Sheet

Description: Weekly Status

Tabs: Content and Layout

Summary
Resources
Timesheets
Projects

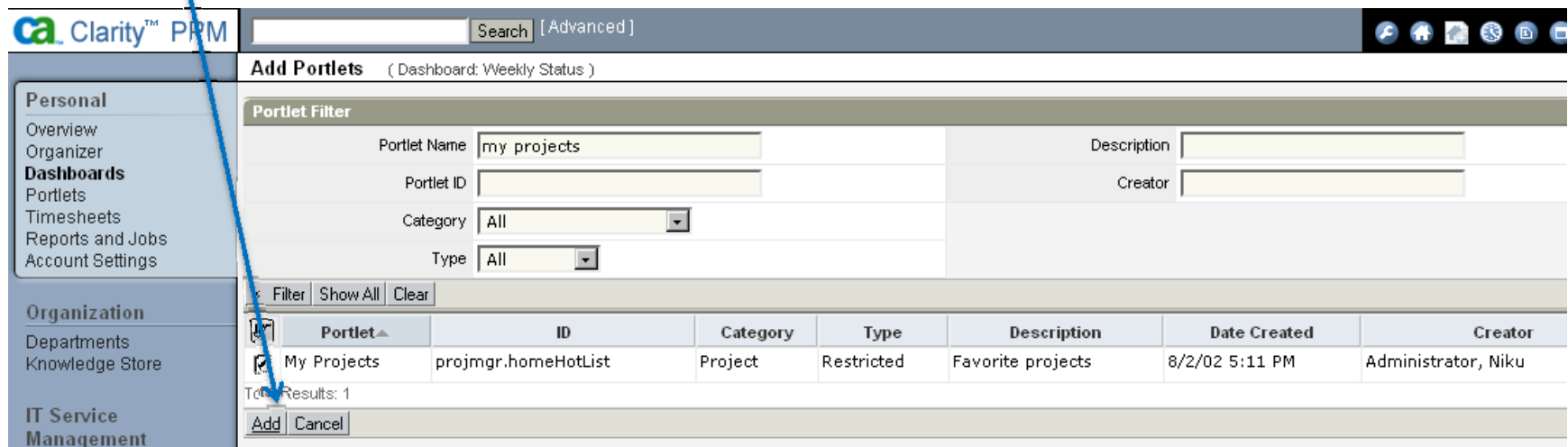
Project Task Duration

Save Delete Publish Cancel

⚠ = Required ⚡ = Enter Once 🔒 = Unique

lab demo

Search for the “my projects” portlet and select it then click on “Add”...



CA Clarity™ PPM

Search [Advanced]

Add Portlets (Dashboard: Weekly Status)

Portlet Filter

Portlet Name: my projects

Portlet ID:

Category: All

Type: All

Description:

Creator:

Filter Show All Clear

| Portlet | ID | Category | Type | Description | Date Created | Creator |
|---|---------------------|----------|------------|-------------------|----------------|---------------------|
| <input checked="" type="checkbox"/> My Projects | projmgr.homeHotList | Project | Restricted | Favorite projects | 8/2/02 5:11 PM | Administrator, Niku |

Total Results: 1

Add Cancel

lab demo

Notice that the portlet has now been added to your page. The “gears” icon denotes this portlet is system restricted...

The screenshot shows the Clarity PPM interface. On the left is a navigation menu with sections: Personal (Overview, Organizer, Dashboards, Portlets, Timesheets, Reports and Jobs, Account Settings), Organization (Departments, Knowledge Store), IT Service Management (Services), and Portfolio Management (Portfolios, Programs, Projects, Applications, Assets). The main content area is titled 'Dashboard: Details (Dashboard: Weekly Status)'. It has a 'General' tab with fields for 'Dashboard Name' (Weekly Status), 'Dashboard ID' (weeklstatusFRAME), and 'Description' (Weekly Status). There are checkboxes for 'Allow End Users to Add Tabs' (checked), 'Export' (Fit to Page and One Portlet per Slide/Sheet, both checked). Below this is a 'Tabs: Content and Layout' section. It shows a list of tabs: Summary, Resources, Timesheets, and Projects. The 'Projects' tab is selected. To the right of the tab list is a preview area showing a 'Project Task Duration' chart (a pie chart) and a 'My Projects' portlet. The 'My Projects' portlet is circled in blue and contains a gear icon, indicating it is system restricted. At the bottom of the main content area are buttons: Save, Delete, Publish, and Cancel.

lab demo

Let's create one of our own. Click on the new portlet icon below and choose "Graph Portlet"...

CA Clarity™ PPM Search [Advanced]

Dashboard: Details (Dashboard: Weekly Status) [View Dashboard][Export]

General

* Dashboard Name Weekly Status

+ Dashboard ID weeklystatusFRAME

Allow End Users to Add Tabs ☒

Export ☒ Fit to Page ☒ One Portlet per Slide/Sheet

Description Weekly Status

Tabs: Content and Layout

+ - [New Portlet Icon] [Edit Icon] [Add Icon] [Remove Icon]

Summary
Resources
Timesheets
Projects

Graph Portlet
Grid Portlet
Filter Portlet

Duration
My Projects

Save Delete Publish Cancel

* = Required + = Enter Once + = Unique

lab demo

Now we need to choose a data provider. Let's use the NSQL query "Projects vs. Tasks". Filter for "projects" select your data provider, then click "Next"...

ca Clarity™ PPM

Search [Advanced]

Personal

Overview

Organizer

Dashboards

Portlets

Timesheets

Reports and Jobs

Account Settings

Organization

Departments

Knowledge Store

IT Service Management

Services

Portfolio Management

Select Data Provider

All Providers

Most Recently Used

Search for a Data Provider

Data Provider Name

projects

Partition

System

Description

Category

All

Type

All

Number of Dimensions

Filter

Show All

Clear

| | Data Provider ▲ | Partition | Description | Type | Din |
|--|--------------------|-----------|-------------|-------|-----|
| | Projects vs. Tasks | System | | Query | 2 |

Total Results: 1

Next

Cancel

Fill out the required fields and click “Next”...

ca Clarity™ PPM Search [Advanced]

Graph Portlet: General

Personal
Overview
Organizer
Dashboards
Portlets
Timesheets
Reports and Jobs
Account Settings

Organization
Departments
Knowledge Store

IT Service Management
Services

Portfolio Management
Portfolios
Programs
Projects
Applications
Assets
Products
Other Work

Requirements

General

* Portlet Name

* + Portlet ID

Category

Description

Base Size

* + Instance Type

Next Previous Cancel

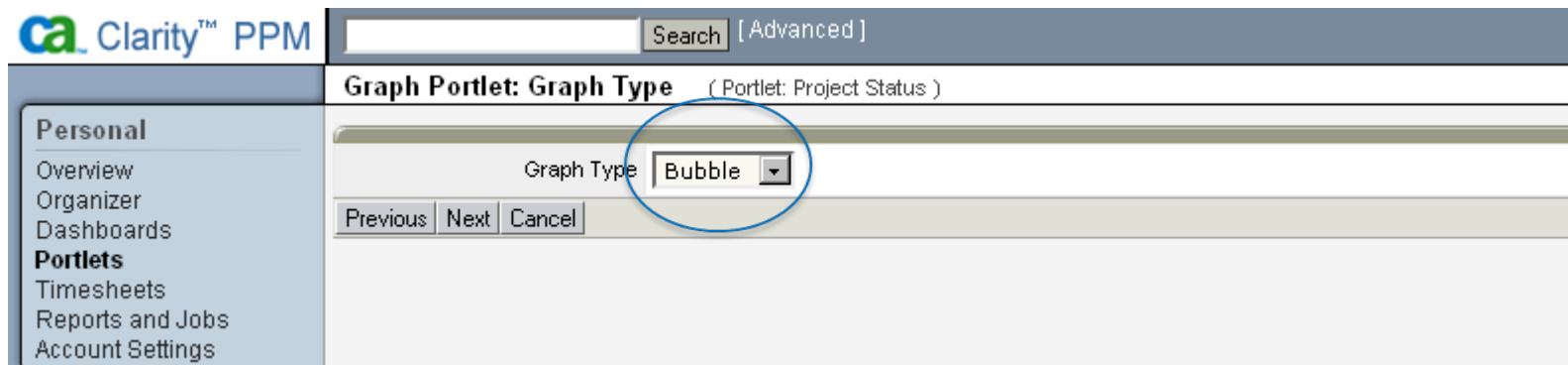
Data Provider: Projects vs. Tasks

| Attribute | Data Type | Description |
|---------------|-----------|-------------|
| Project ID | Number | |
| Project Name | String | |
| Task Duration | Number | |
| Task Finish | Date | |
| Task ID | Number | |
| Task Name | String | |
| Task Start | Date | |

* = Required + = Enter Once + = Unique

lab demo

Select your graph type and click “Next”...



ca Clarity™ PPM

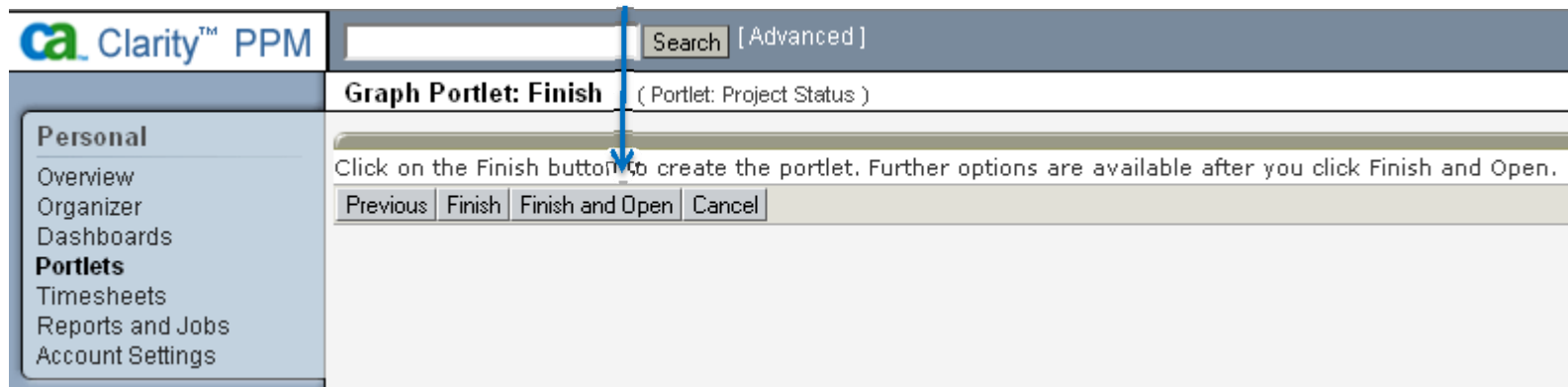
Search [Advanced]

Graph Portlet: Graph Type (Portlet: Project Status)

Graph Type **Bubble**

Previous Next Cancel

Click on “Finish and Open”...



ca Clarity™ PPM

Search [Advanced]

Graph Portlet: Finish (Portlet: Project Status)

Click on the Finish button to create the portlet. Further options are available after you click Finish and Open.

Previous Finish Finish and Open Cancel

Click on the “Source Data” link and set the “Series Dimension” to “PROJECT” then click “Save ”...

The screenshot shows the CA Clarity PPM interface. On the left is a navigation menu with sections: Personal (Overview, Organizer, Dashboards, Portlets, Timesheets, Reports and Jobs, Account Settings), Organization (Departments, Knowledge Store), IT Service Management (Services), and Portfolio Management (Portfolios, Programs, Projects). The main area is titled "Graph Portlet: Source Data (Portlet: Project Status)". It contains a left sidebar with expandable sections: General, Graph Section (with sub-items Graph Type and Source Data), Graph Filter Section (with sub-items Layout and Fields), and Access to this Portlet (with sub-items Full View, Resource, Group, and OBS Unit). The "Source Data" section is selected. The right pane shows configuration options: Series Dimension (set to PROJECT), X Axis (Task Start), Y Axis (Task Finish), and Bubble Radius (Task Duration). At the bottom are buttons for Save, Save and Exit, and Cancel. A legend at the bottom left of the main area explains the icons: a right arrow for Current, an empty square for No Data, a grey square for Data Entered, and a white square for Not Yet Available.

CA Clarity™ PPM

Search [Advanced]

Graph Portlet: Source Data (Portlet: Project Status)

Personal
Overview
Organizer
Dashboards
Portlets
Timesheets
Reports and Jobs
Account Settings

Organization
Departments
Knowledge Store

IT Service Management
Services

Portfolio Management
Portfolios
Programs
Projects

General ☐
Graph Section
▶ Graph Type ☐
▶ **Source Data** ➔
▶ Options ☐
Graph Filter Section
▶ Layout ☐
▶ Fields ☐
Access to this Portlet
▶ Full View ☐
▶ Resource ☐
▶ Group ☐
▶ OBS Unit ☐
➔ = Current
☐ = No Data
☐ = Data Entered
☐ = Not Yet Available

Series Dimension: PROJECT
X Axis: Task Start
Y Axis: Task Finish
Bubble Radius: Task Duration

Save Save and Exit Cancel

lab demo

Click on the “Options” link, select the values below then click “Save and Exit”...

The screenshot shows the CA Clarity PPM web interface. The top navigation bar includes the CA Clarity PPM logo, a search bar, and a [Advanced] link. On the left, a sidebar menu lists various sections: Personal (Overview, Organizer, Dashboards, Portlets, Timesheets, Reports and Jobs, Account Settings), Organization (Departments, Knowledge Store), IT Service Management (Services), and Portfolio Management (Portfolios, Programs, Projects). The main content area is titled "Graph Portlet: Options" with a sub-header "(Portlet: Project Status)". It features a left-hand menu for the portlet options: General, Graph Section (with sub-items Graph Type and Source Data), Options (highlighted with a right-pointing arrow), Graph Filter Section (with sub-items Layout and Fields), and Access to this Portlet (with sub-items Full View, Resource, Group, and OBS Unit). Below this menu are checkboxes for "Current", "No Data", "Data Entered", and "Not Yet Available". The main configuration area on the right is titled "Options: Entire Graph" and contains a warning: "Click Save immediately after setting Legend Labels, Datapoint Labels, or Mouseover Labels or your changes may be lost." The configuration options include: Show Legend (checked), Show Title (checked), Legend Labels (Project Name), Datapoint Labels (None), Mouseover Labels (Value), Position (Bottom), Sort Column (Project Name), Filter (Automatically show results selected), Allow Configuration (checked), and Allow Label Configuration (checked). At the bottom are buttons for Save, Save and Exit, and Cancel.

CA Clarity™ PPM

Search [Advanced]

Graph Portlet: Options (Portlet: Project Status)

Personal

- Overview
- Organizer
- Dashboards
- Portlets**
- Timesheets
- Reports and Jobs
- Account Settings

Organization

- Departments
- Knowledge Store

IT Service Management

- Services

Portfolio Management

- Portfolios
- Programs
- Projects

General

Graph Section

- Graph Type
- Source Data
- Options**

Graph Filter Section

- Layout
- Fields

Access to this Portlet

- Full View
- Resource
- Group
- OBS Unit

⇒ = Current
□ = No Data
□ = Data Entered
□ = Not Yet Available

Options: Entire Graph

Click Save immediately after setting Legend Labels, Datapoint Labels, or Mouseover Labels or your changes may be lost.

Show Legend ☒

Show Title ☒

Legend Labels Project Name

Datapoint Labels None

Mouseover Labels Value

Position Bottom

Sort Column Project Name

Filter ☒ Automatically show results
☐ Do not show results until I filter

Allow Configuration ☒

Allow Label Configuration ☒

Save Save and Exit Cancel

lab demo

Return to the “Weekly Status” dashboard design view (Projects tab) and you’ll see your new portlet. Grab it with your mouse and drag-n-drop it up to the top...

ca Clarity™ PPM Search [Advanced]

Dashboard: Details (Dashboard: Weekly Status)

General

Dashboard Name: Weekly Status

Dashboard ID: weeklystatusFRAME

Allow End Users to Add Tabs: ☒

Export: ☒ Fit to Page ☒ One Portlet per Slide/Sheet

Description: Weekly Status

Tabs: Content and Layout

Summary
Resources
Timesheets
Projects

My Projects

Project Status

Project Task Duration

Save Delete Publish Cancel

* = Required + = Enter Once = Unique

lab demo

Now save your changes, then click “Publish” (confirm the new layout when prompted), Then click on “View Dashboard”...

ca Clarity™ PPM Search [Advanced]

Dashboard: Details (Dashboard: Weekly Status) [View Dashboard]

Personal
Overview
Organizer
Dashboards
Portlets
Timesheets
Reports and Jobs
Account Settings

Organization
Departments
Knowledge Store

IT Service Management
Services

Portfolio Management
Portfolios
Programs
Projects
Applications
Assets
Products
Other Work

Requirements Planning
Release Planning
Releases
Requirements

General

Dashboard Name Weekly Status

Dashboard ID weeklstatusFRAME

Allow End Users to Add Tabs ☒

Export ☒ Fit to Page ☒ One Portlet per Slide/Sheet

Description Weekly Status

Tab: Content and Layout

Summary
Resources
Timesheets
Projects

Project Status

My Projects

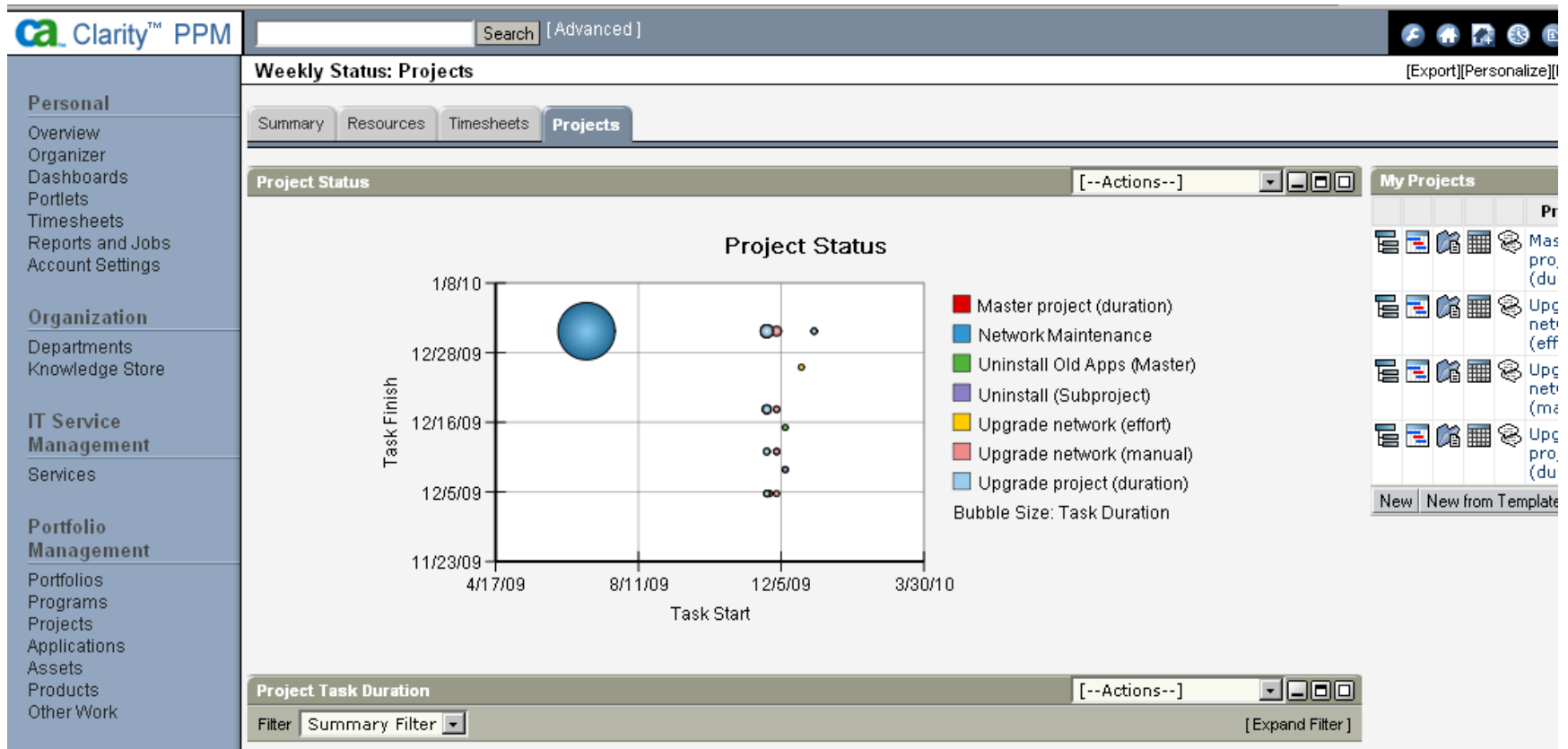
Project Task Duration

Save Delete Publish Cancel

✖ = Required ➤ = Enter Once ✚ = Unique

lab demo

And there's your new portlet in action...



lab demo

Let's share this dashboard with another resource. Return to the dashboard design window and click on the "Sharing" link ...

The screenshot shows the 'Dashboard: Details' window for a dashboard named 'Weekly Status'. The window has a search bar at the top with the text 'Search [Advanced]'. Below the search bar, there are navigation links: '[View Dashboard]', '[Export]', and '[Sharing]'. The 'Sharing' link is highlighted with a blue arrow. The main content area is divided into two sections: 'General' and 'Tabs: Content and Layout'. The 'General' section contains fields for 'Dashboard Name' (Weekly Status), 'Dashboard ID' (weeklstatusFRAME), 'Description' (Weekly Status), 'Allow End Users to Add Tabs' (checked), 'Export' (Fit to Page and One Portlet per Slide/Sheet checked), and 'Tabs: Content and Layout'. The 'Tabs: Content and Layout' section shows a list of tabs: Summary, Resources, and Timesheets. The 'Summary' tab is selected, and it displays two portlets: 'Project Risks' and 'Project Alignment vs Priority Bubble'.

lab demo

Click on “Add” to bring up a list of the resources and select Peter Abrams...

The screenshot shows the CA Clarity PPM interface. The top navigation bar includes the CA Clarity PPM logo, a search bar, and several icons. The left sidebar contains a menu with 'Personal' (Overview, Organizer, Dashboards, Portlets, Timesheets, Reports and Jobs, Account Settings) and 'Organization' (Departments, Knowledge Store, IT Service Management). The main content area is titled 'Dashboard: Sharing' (Dashboard: Weekly Status) and has tabs for 'Resources', 'Groups', 'OBS Units', and 'Full View'. Below the tabs, it says 'Below are resources with explicit rights to this dashboard.' and provides input fields for 'Last Name', 'First Name', 'Resource ID', and 'Access Right'. There are buttons for 'Filter', 'Show All', and 'Clear'. Below this, it says 'There are no resources to display.' and has 'Add' and 'Cancel' buttons. A blue arrow points from the 'Add' button to the 'Select Resources' dialog. The 'Select Resources' dialog has a 'Resource Filter' section with input fields for 'Last Name', 'First Name', and 'User Name', and buttons for 'Filter', 'Show All', and 'Clear'. Below the filter is a table with columns 'Last Name', 'First Name', and 'User Name'. The table has a checkbox column and a 'Select More' button. The table contains two rows: 'Abdul' and 'Abrams'. The 'Abrams' row is selected, and a blue arrow points to it. The table also has a 'Cancel' button.

Dashboard: Sharing (Dashboard: Weekly Status)

Resources Groups OBS Units Full View

Below are resources with explicit rights to this dashboard.

Last Name Resource ID

First Name Access Right

Filter Show All Clear

There are no resources to display.

Add Cancel

Select Resources (Dashboard: Weekly Status)

Resource Filter

Last Name

First Name

User Name

Filter Show All Clear

Add Add and Select More Cancel

| | Last Name | First Name | User Name |
|-------------------------------------|-----------|------------|-----------|
| <input type="checkbox"/> | Abdul | Jaleel | ahmmd01 |
| <input checked="" type="checkbox"/> | Abrams | Peter | pabrams |

lab demo

Assign Peter “View” access and click “Save”. Don’t forget to assign this resource the proper viewing rights as well...

ca Clarity™ PPM

Search [Advanced]

Dashboard: Sharing (Dashboard: Weekly Status)

Resources Groups OBS Units Full View

Below are resources with explicit rights to this dashboard.

Last Name Resource ID

First Name Access Right

Filter Show All Clear

| <input type="checkbox"/> | Last Name▲ | First Name | ID | Access |
|--------------------------|------------|------------|---------|--|
| <input type="checkbox"/> | Abrams | Peter | pabrams | <input type="text" value="View"/> View Manager |

Total Results: 1

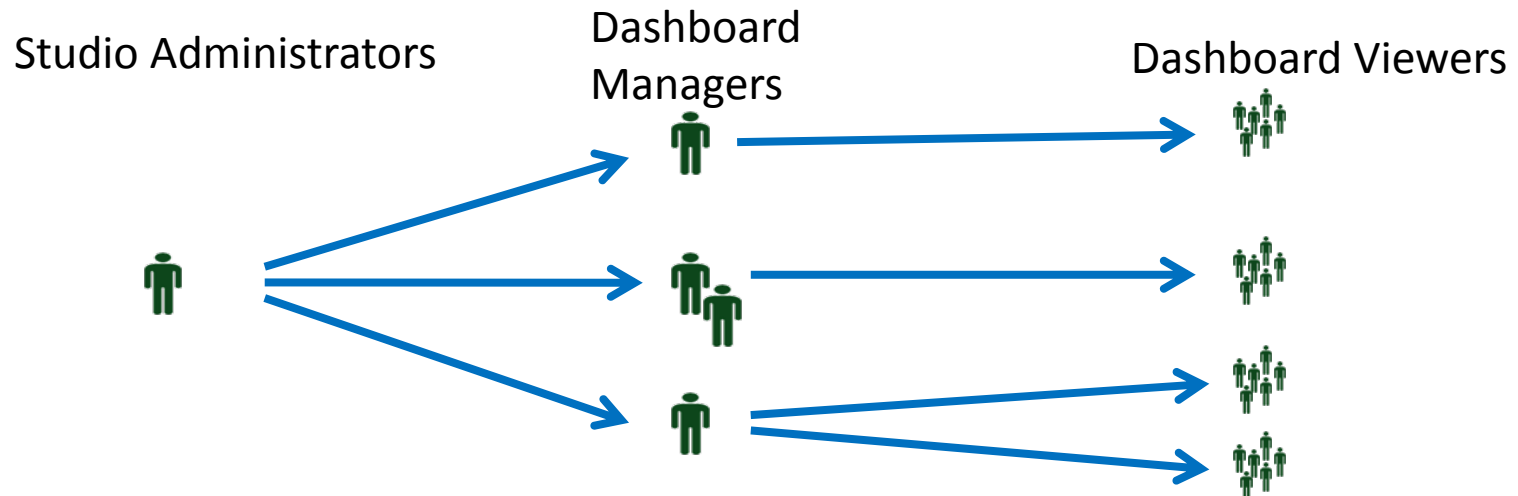
Add Remove Save Cancel

best practices

- Define the scope of responsibilities for the dashboard managers (DM)
 - Studio Administrator and DM should be in agreement on what each other can do
 - When a dashboard is shared, the DM needs to know what gets shared
 - Sharing a dashboard, does **not** automatically give the dashboard viewer access to all of the content in the dashboard
 - Sharing a dashboard, does **not** automatically give the dashboard viewer access to the instance data with a portlet

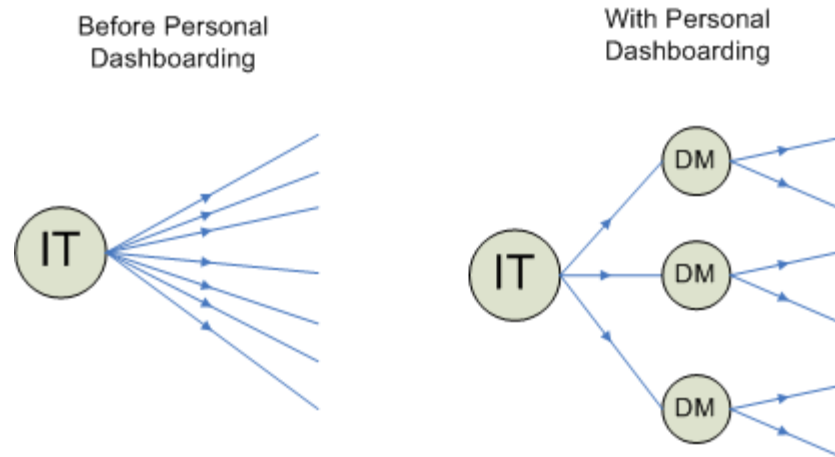
Distributed Dashboard Management

- Allow business units or departments to have specific end-users to be Dashboard Manager (DM):
 - DM can update and reset dashboards to their shared dashboard viewers
 - Studio Administrators still have access to the dashboards and can update and reset dashboards in behalf of the DM



best practices

- Give the dashboard managers (DM) the authority to carry out their responsibilities
 - Grant access to a portlet or instance
 - Train on how to use Personal Dashboarding
 - Empower the end-users to manage their data in order to allow them faster access to the get the data they need



best practices

Remember to hide any data providers you do not want visible to your dashboard creators...

The screenshot shows the 'CA Clarity PPM Administration Tool' interface. On the left is a navigation menu with sections: 'Organization and Access' (Resources, Groups, OBS, License Information) and 'CA Clarity Studio' (Partition Models, Objects, Queries, Portlets, Portlet Pages, Menu Manager, UI Themes, Add-Ins, Views). The main area is titled 'Administration Tool' and 'Query Properties: General'. It contains a 'General' tab with sub-sections: 'General' (selected), 'NSQL', 'Attributes', 'Configurable Actions', and 'Linking'. A legend indicates: '⇒ = Current', '□ = No Data', '■ = Data Entered', and '□ = Not Yet Available'. The 'General' section includes fields for 'Query Name' (Benefits by Goal), 'Query ID' (Benefits by Goal), 'Available for User Portlets' (checked), 'Content Source' (Niku Development), 'Category' ([--Select--]), and a 'Description' text area. At the bottom are buttons for 'Save and Continue', 'Save and Exit', and 'Cancel'. A legend at the very bottom explains symbols: '*' = Required, '+' = Enter Once, and '#' = Unique.

best practices

Modify the attribute names and localize so names are more suitable for end-users

Administration Tool
Query Properties: Attributes (Query: Benefits by Goal)

| Name | ID | Attribute Class | Data Type | Extended Data Type | Required | Lookup |
|------------------------|------------------------|--------------------|-----------|--------------------|----------|--------|
| benefit | benefit | Metric | Numeric | Numeric | | |
| GOAL | | | | | | |
| goal | goal | Dimension Key | String | String | | |
| portfolio_id | portfolio_id | Dimension Property | Numeric | Numeric | | ✓ |
| scenario_id | scenario_id | Dimension Property | Numeric | Numeric | | ✓ |
| compare_to_scenario_id | compare_to_scenario_id | Dimension Property | | | | |
| status | status | Dimension Property | | | | |
| role_id | role_id | Dimension Property | | | | |
| booking_status_id | booking_status_id | Dimension Property | | | | |

Administration Tool
Query Attribute (Query: Benefits by Goal)

Save Submit Cancel

Attribute Name: portfolio_id

Attribute ID: portfolio_id

Description:

Data Type: Numeric

Extended Data Type: Lookup - Numeric

Lookup: Portfolios Select

Required: ☐

Save Submit Cancel

Required

Modify the attribute name and localize for other languages

Q&A

additional documentation

Users can create portlets in the CA Clarity PPM application using the same functionality that is found in Studio. So you will want to refer to the *Studio Developers Guide* for complete information on using this feature. However... here are some helpful dashboard “basics” taken from our documentation and included here for your convenience

Dashboard Basics

- A dashboard is a portlet page created by an end user in CA Clarity PPM. A dashboard has the capabilities of other portlet pages with the following additional capabilities:
 - An end user can share a dashboard with other end users.
 - A dashboard has more options on how content is exported to Excel or PowerPoint. The options include:
 - Fit to page, which exports all portlets on a tab to a single page
 - One portlet per slide or sheet, which exports each portlet to its own page

Dashboard Basics Continued...

A dashboard has specific properties settings. The properties settings include:

- The portlet page type must be either *Page with Tabs* or *Page Without Tabs*.
 - The dashboard layout can only be one of the following: Two column (50-50 percent), two column (66-34 percent), three column (25-50-25 percent), or three column (33-33-33 percent).
 - The portlet page template is always equal to *Application Page Template*.
- An administrator has different access to user portlets based on where access is attempted:
- In Studio, an administrator can view all user portlets, make changes to the portlets, and publish the changes.
 - In the application, the administrator can view only those portlets the administrator has created or portlets that have been shared.

Dashboard Basics Continued...

To re-label query attributes for the user portlet data provider selection

- 1. Click Queries in the CA Clarity Studio menu. (The list page appears.)
- 2. Select the query. (The query's properties page appears.)
- 3. Click Attributes in the content menu. (The list of attributes for the query appears.)
- 4. Click the name of the attribute you want to re-label. (The *Query Attribute page* appears.)
- 5. Click the Translate icon next to the Attribute Name field. (The *Translate page* appears.)
- 6. Enter the name you want to appear for users in the data provider's attribute list.
- 7. Click Submit.

Dashboard Basics Continued...

Data Providers for User Portlets

- When a user creates a portlet to be used in a dashboard, the user must select a data provider. Query data providers can be used to provide information to user portlets for dashboards.
 - You can prohibit the use of a query data provider by clearing the *Available for User Portlets* checkbox on the query's properties page.
- When a user selects a data provider for a user portlet, the attributes for each data provider are shown to help the user select the correct data provider.
 - You can modify the attribute names to provide more user friendly names to help users make the correct data provider selection.

please complete a session evaluation form

- The number for this session is **PP503LR**
- After completing your session evaluation form, place it in the basket at the back of the room

thank you

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