caWorld'10

hands-on lab: personal dashboarding in CA Clarity™ PPM

Session # PP503LR

Focus Area Project & Portfolio Management

abstract

– 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 +.

Copyright © 2010 CA. All rights reserved.

agenda

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

 Copyright © 2010 CA. All rights reserved.

overview

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.

 Copyright © 2010 CA. All rights reserved.

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.

 Copyright © 2010 CA. All rights reserved.

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

 Copyright © 2010 CA. All rights reserved.

Dashboard functions and roles…

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

Copyright © 2009 CA

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

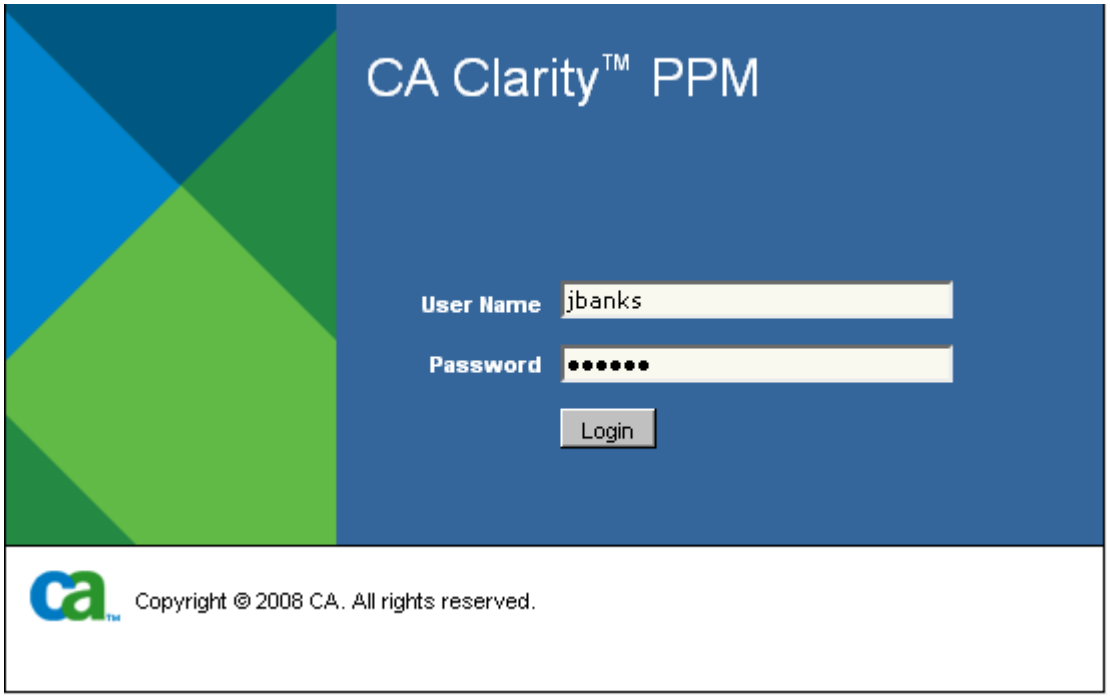
* New rights for 12.0.5

Copyright © 2009 CA

lab demo

lab demo

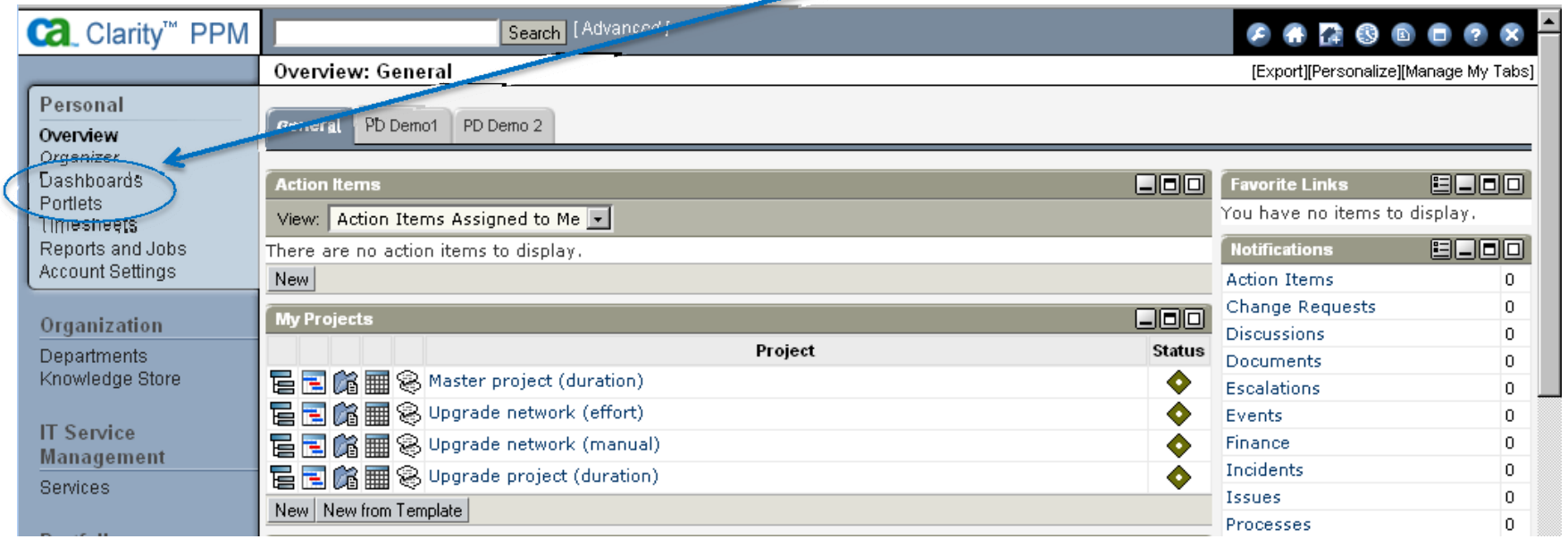
Let's login as a dashboard creator…
Login: jbanks
Password: jbanks



 Copyright © 2010 CA. All rights reserved.

lab demo

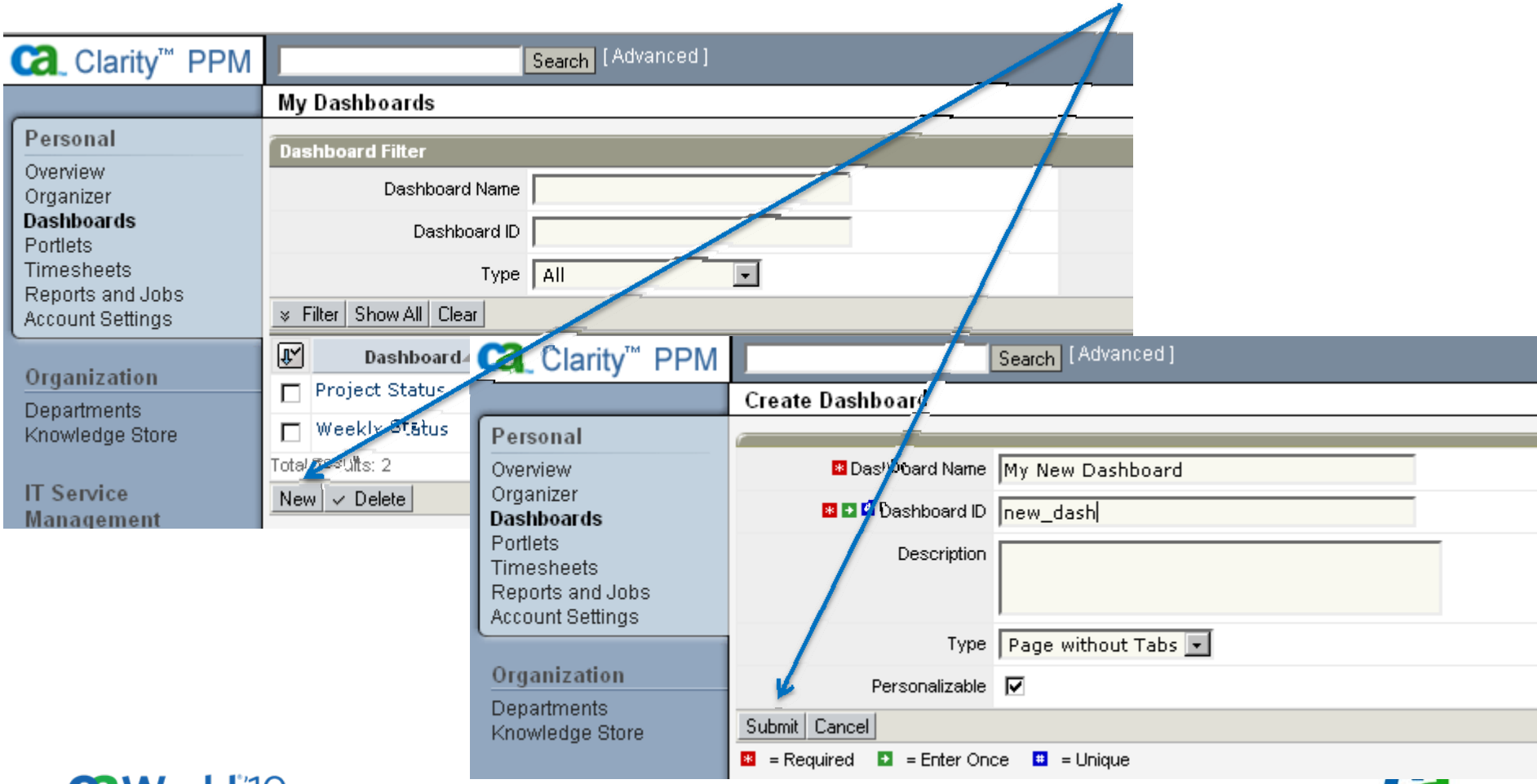
Note the new navigation items available once you have the personal dashboard and portlet rights assigned – click on the “Dashboards” link…



 Copyright © 2010 CA. All rights reserved.

lab demo

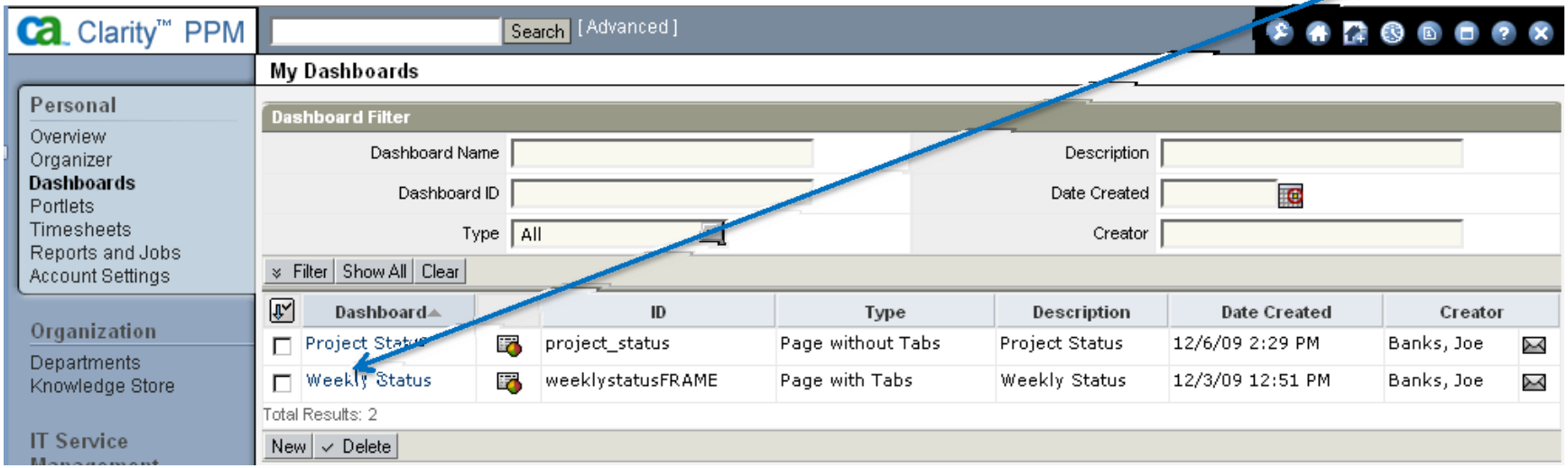
Creating a new dashboard is quite simple. Click “New”, fill in the required fields then click “Submit”…



 Copyright © 2010 CA. All rights reserved.

lab demo

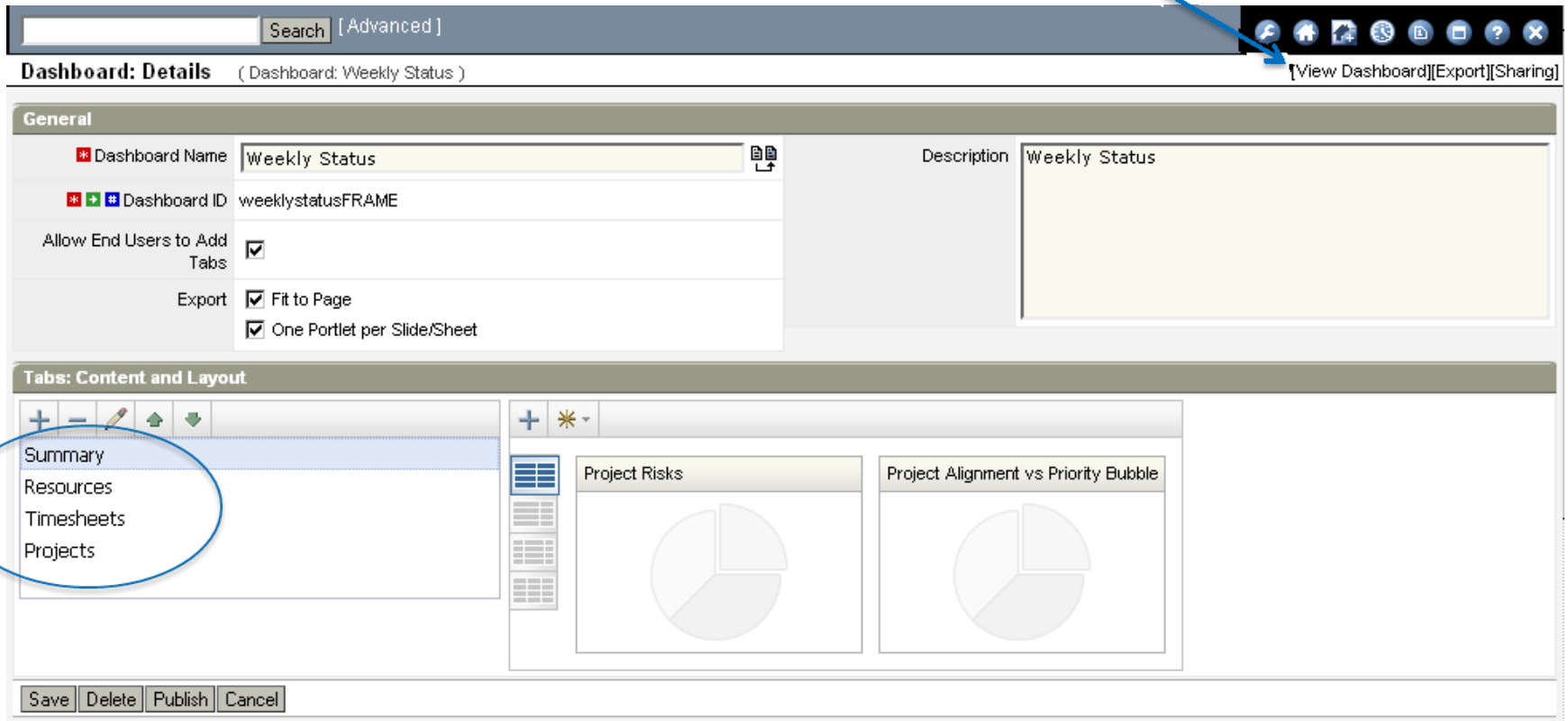
For our lab however, we will be using two personal dashboards which have already been created. Click on the tabbed dashboard page “Weekly Status”…



 Copyright © 2010 CA. All rights reserved.

lab demo

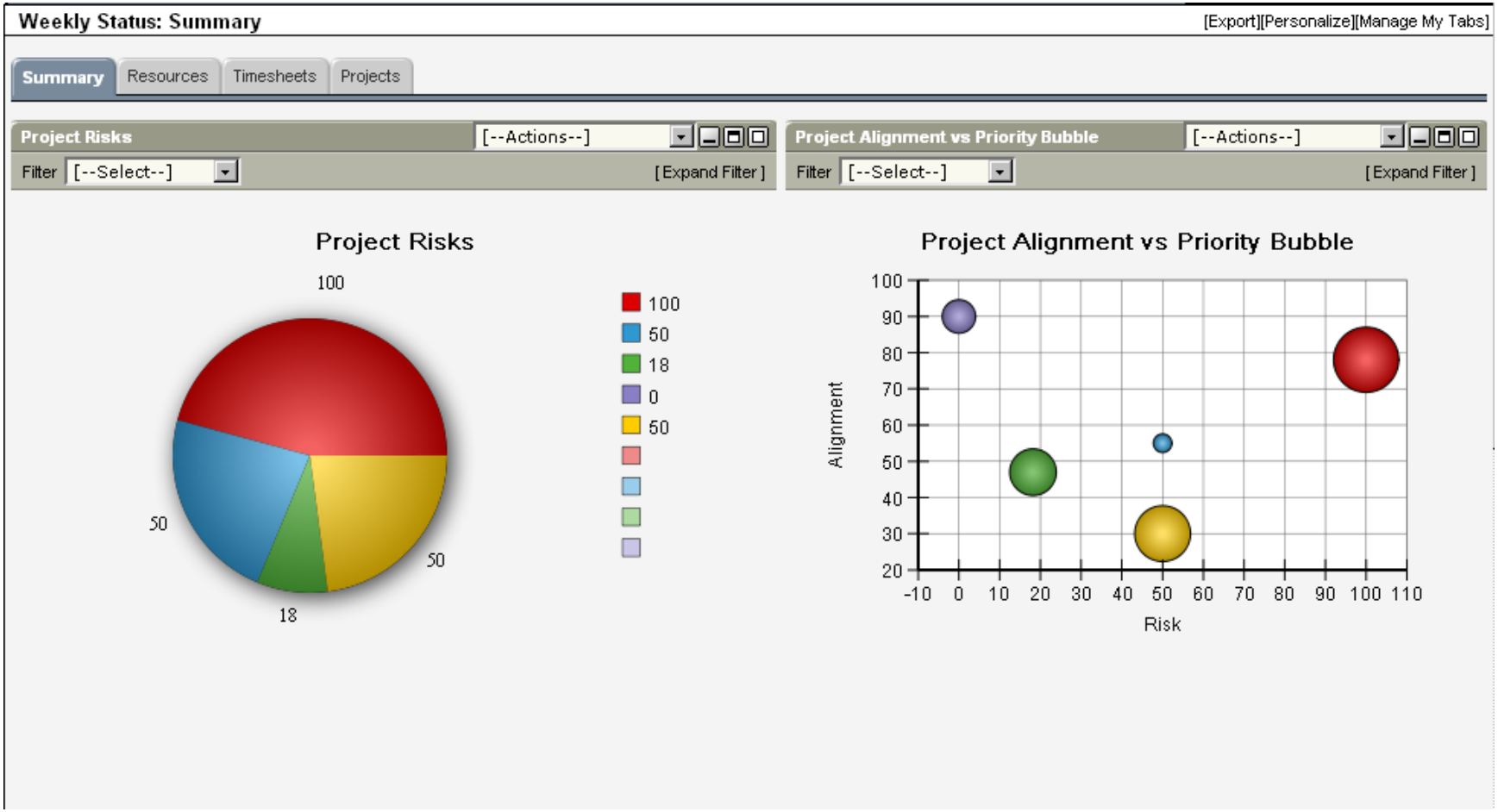
You are now in “design” view. Note the tabs on the left – click on each to view the portlets which have been added. When ready, return to the “Summary” tab and click on the “View Dashboard” link…



 Copyright © 2010 CA. All rights reserved.

lab demo

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



 Copyright © 2010 CA. All rights reserved.

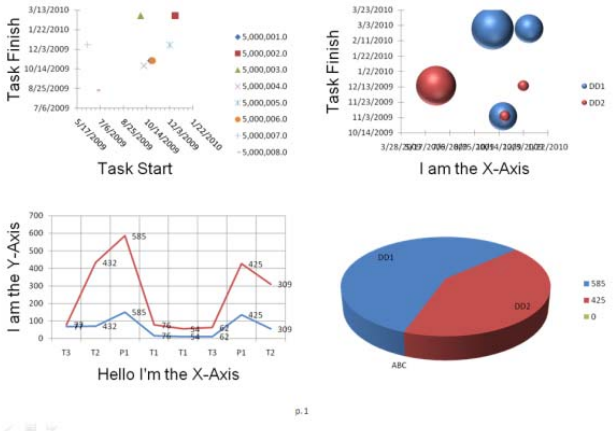
lab demo

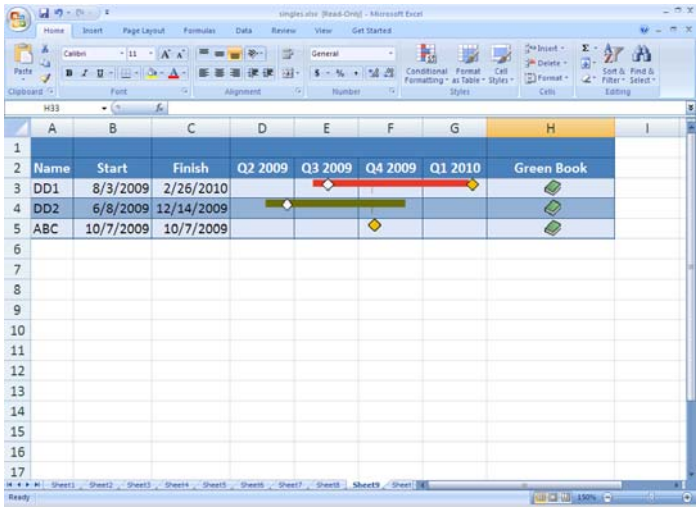
You have the capability to export a grid or graph portlet to Excel or PowerPoint

Export Options:

- Fit to Page
- One Portlet per Page/Worksheet

Graphs are displayed in the native MS Office chart format

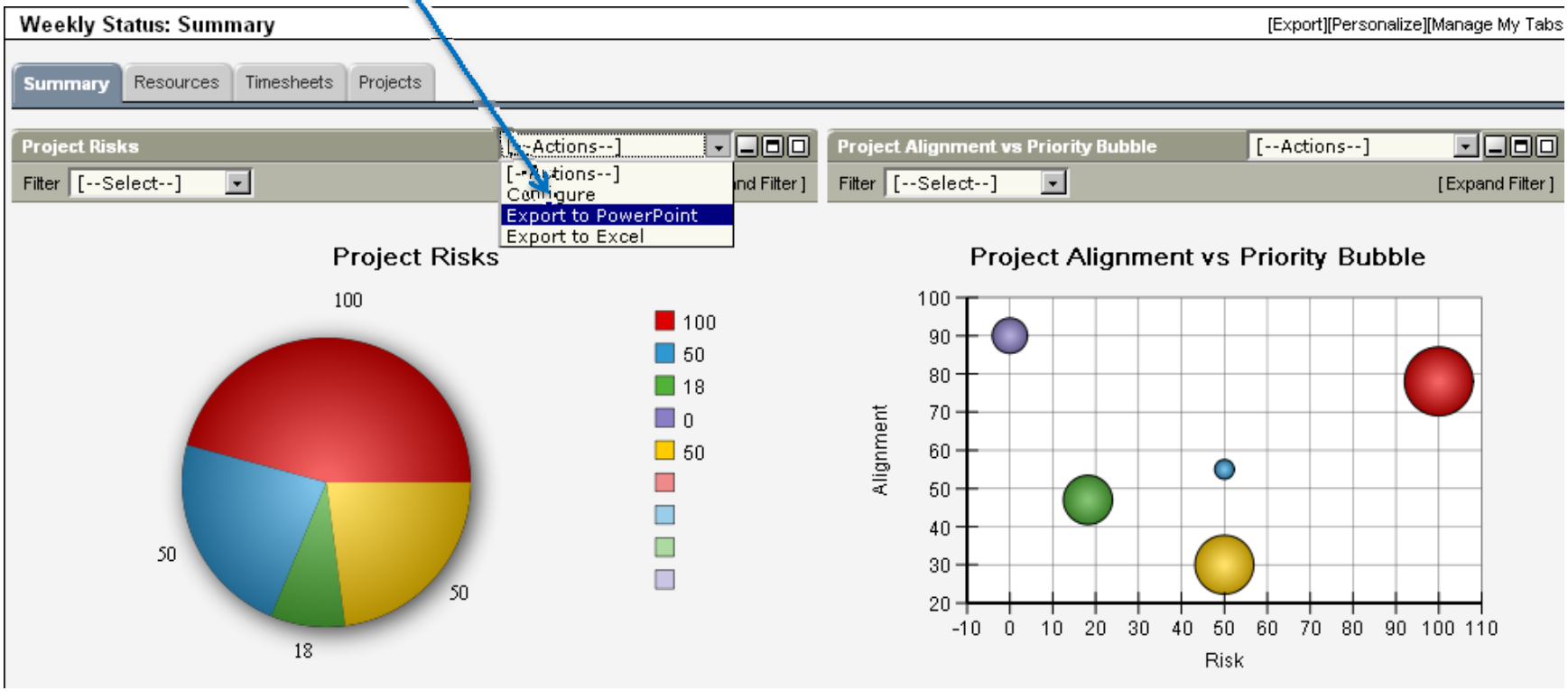




Copyright © 2009 CA

lab demo

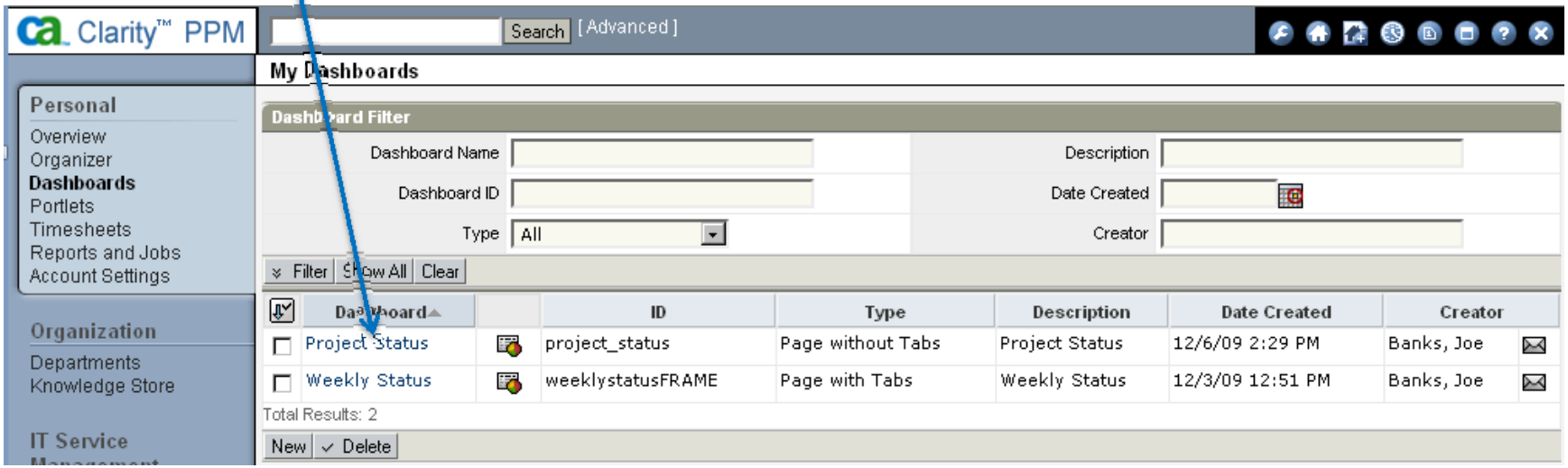
Let's give this a try with a graph portlet… navigate back to the summary tab and choose "Export to Powerpoint". Now try it again with "Export to Excel"



 Copyright © 2010 CA. All rights reserved.

lab demo

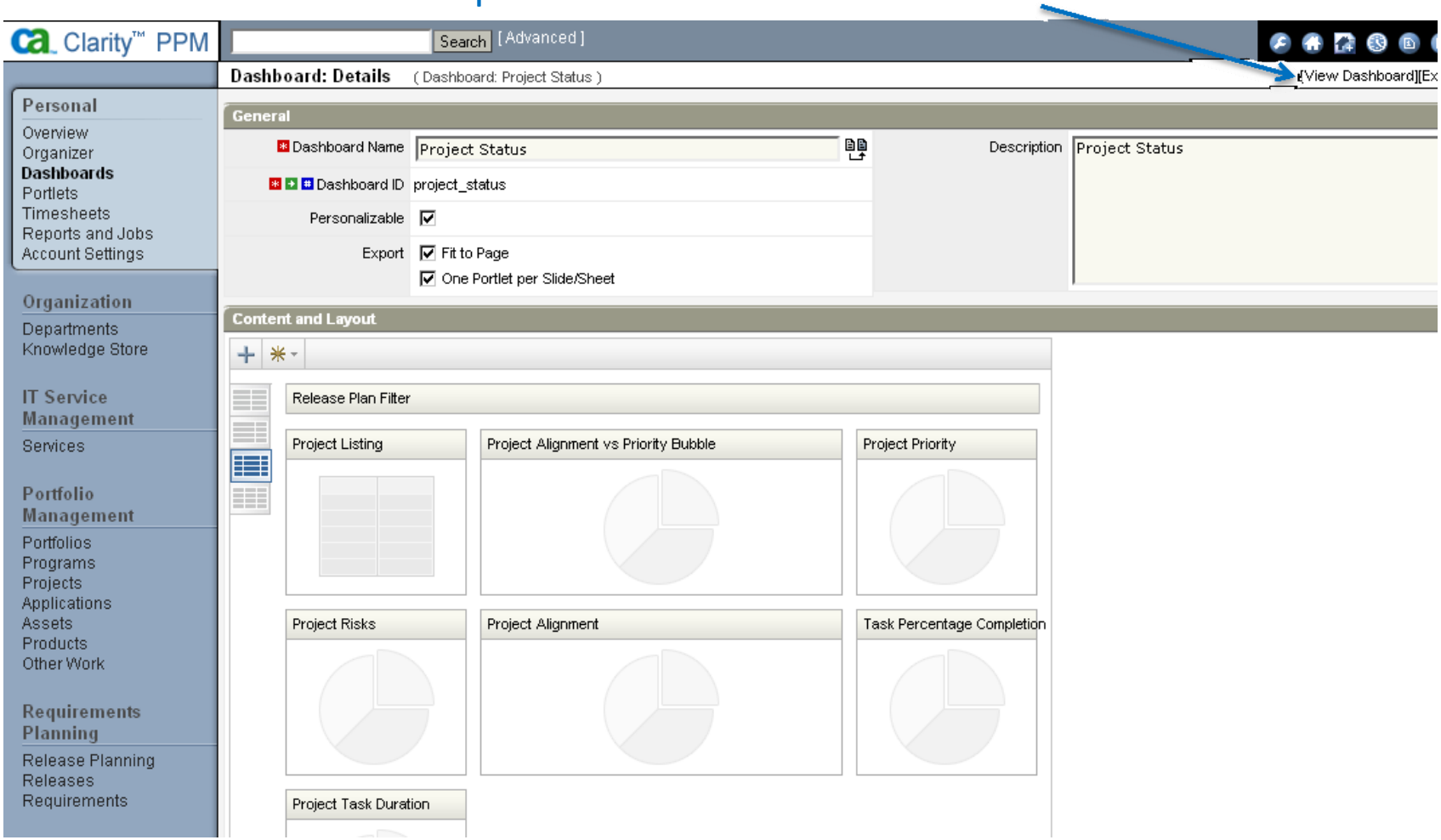
Navigate back to the dashboards link and let's view the page without tabs… "Project Status"



 Copyright © 2010 CA. All rights reserved.

lab demo

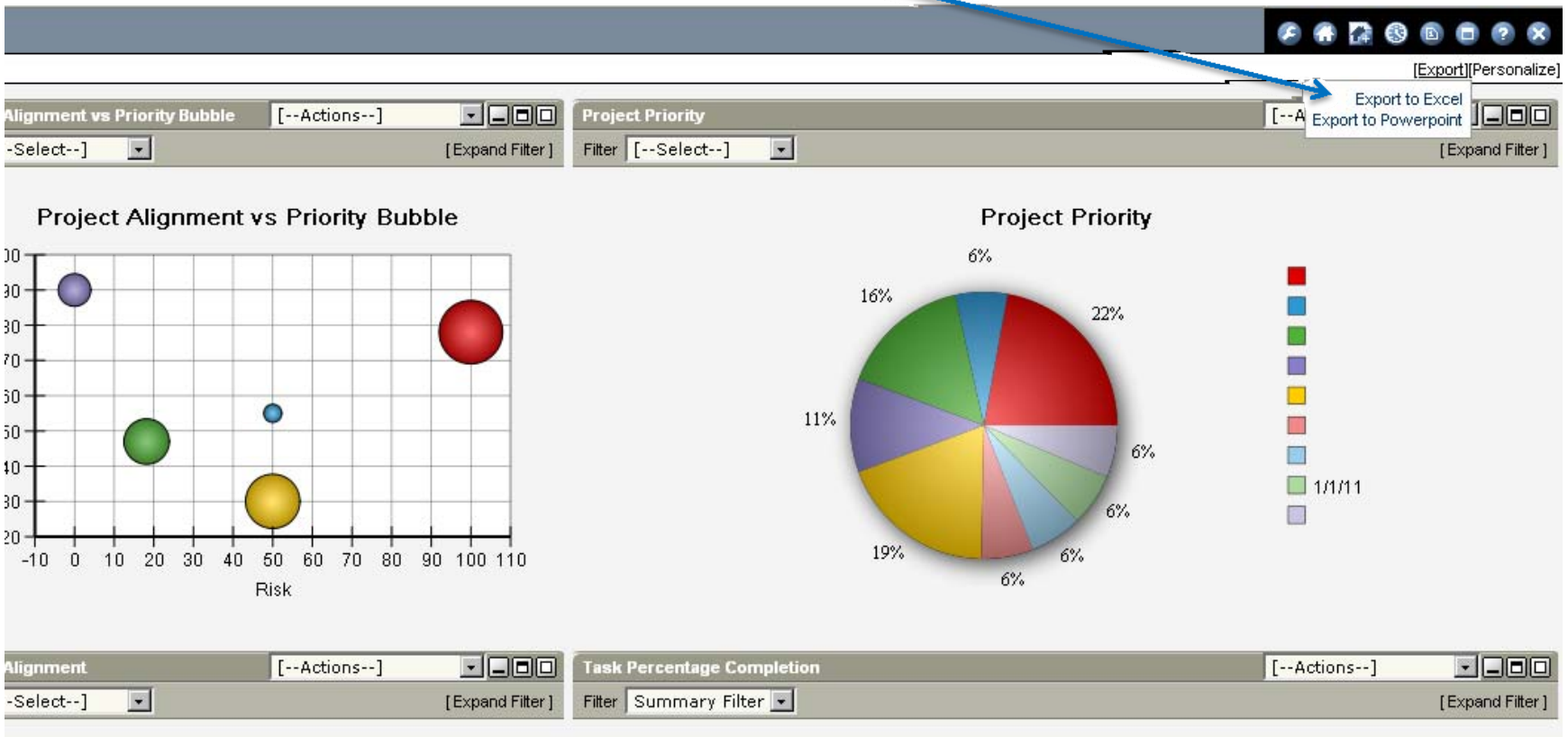
In this dashboard, we have all our portlets on one page… what will it look like if we chose to export the entire dashboard? Click “View



 Copyright © 2010 CA. All rights reserved.

lab demo

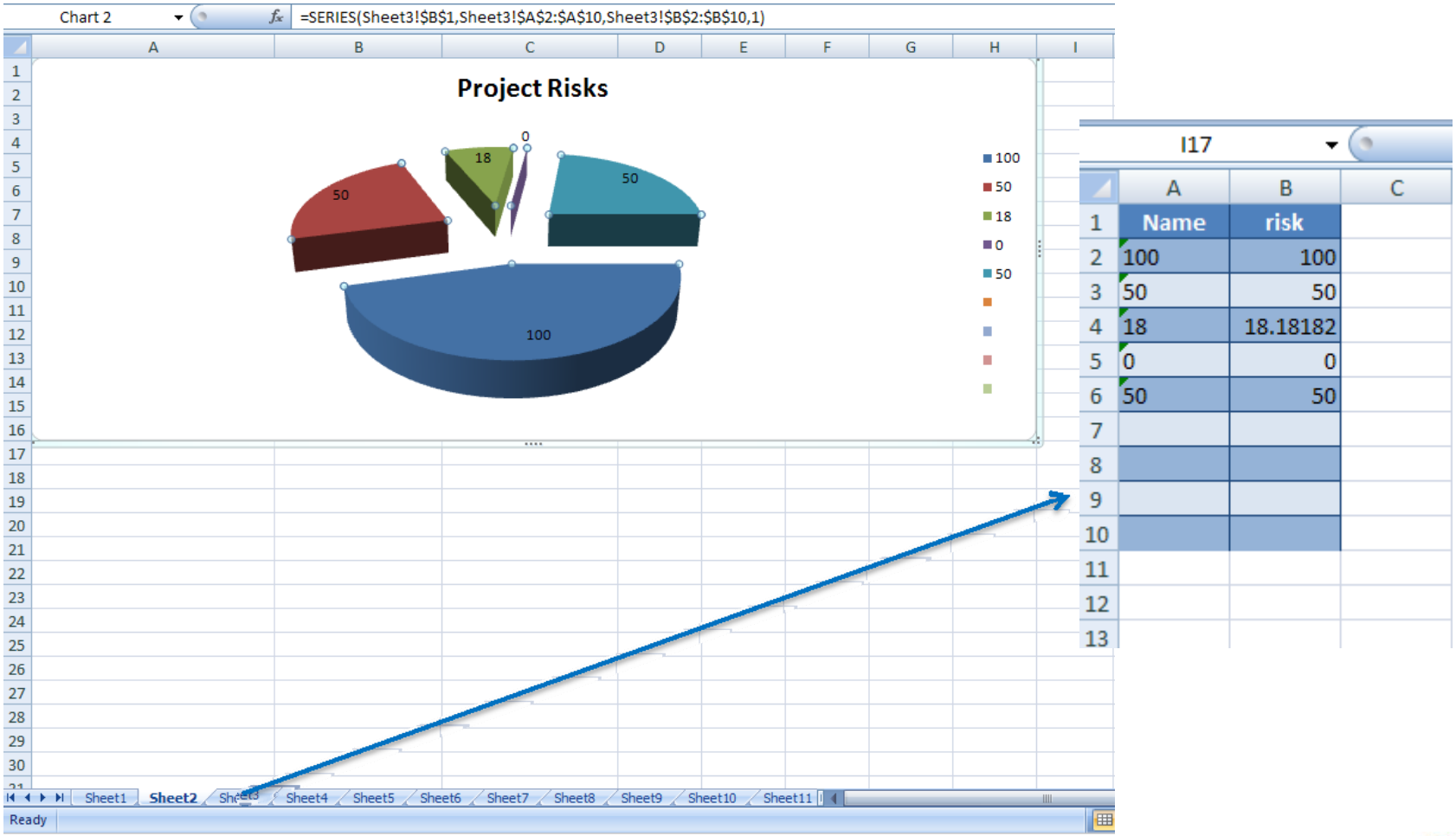
Now select “Export to Excel”…



Copyright © 2010 CA. All rights reserved.

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

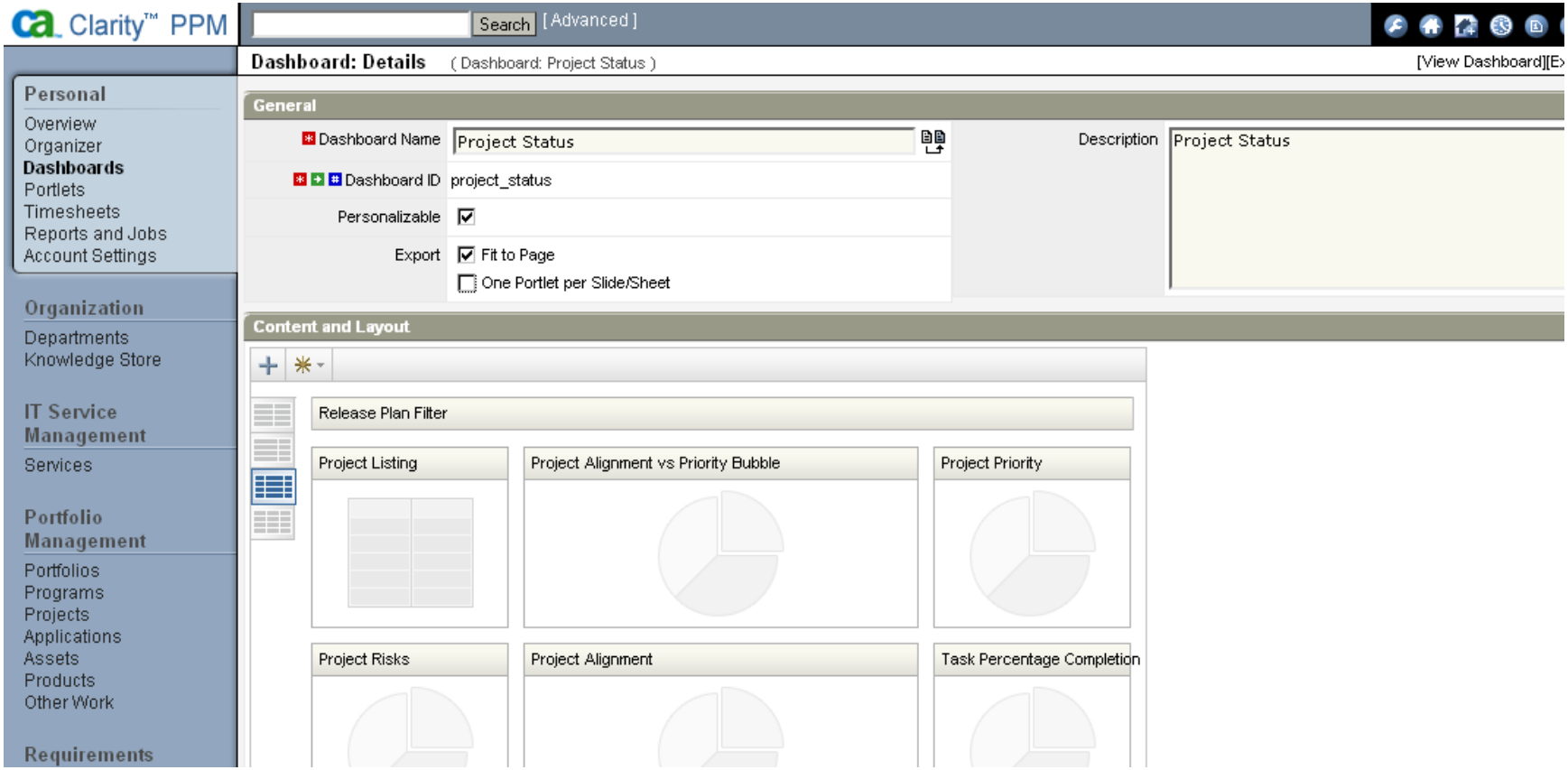


 Copyright © 2010 CA. All rights reserved.

ca technologies

lab demo

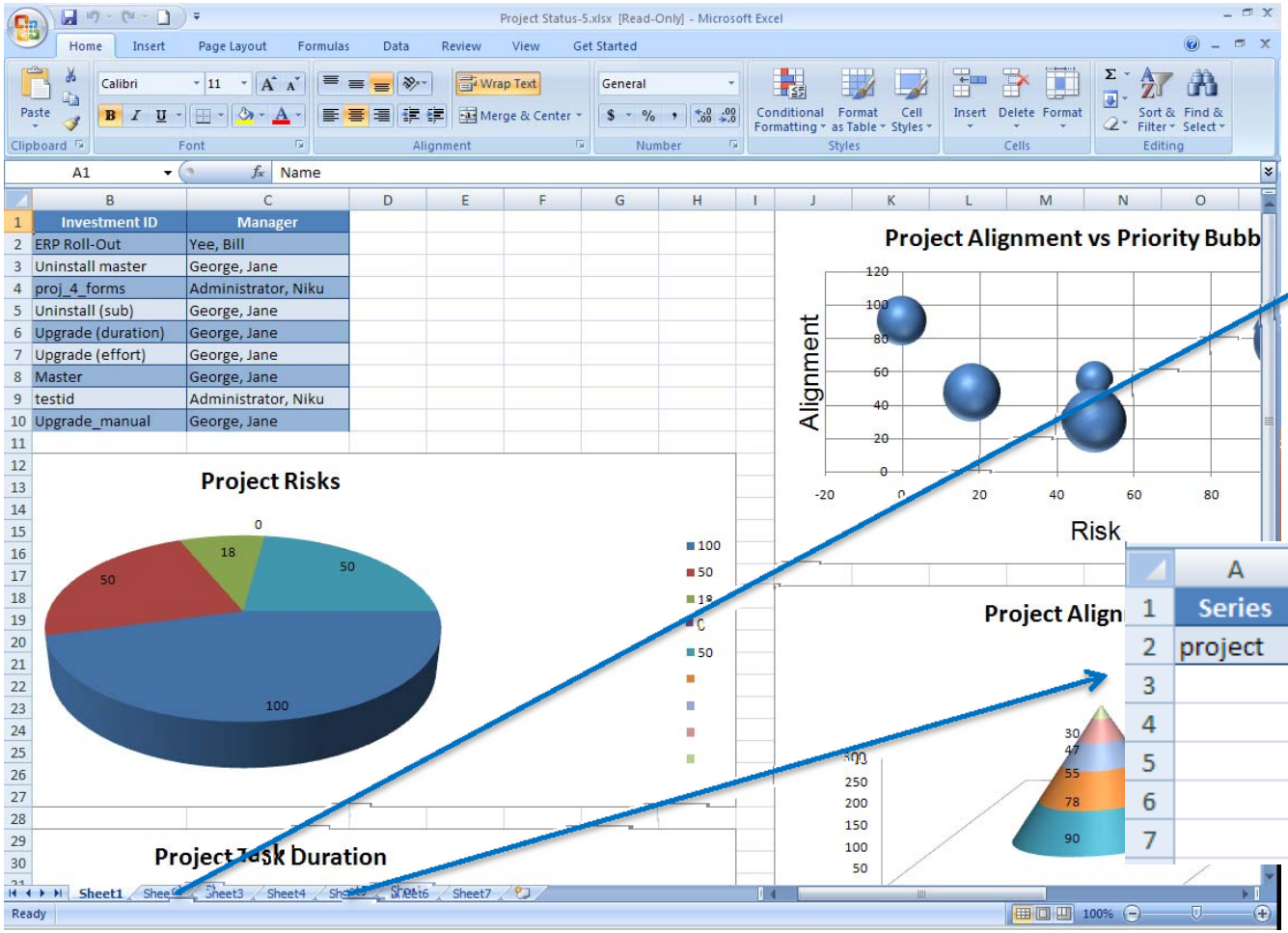
Return to the dashboard design page and uncheck the “One Portlet per Slide/Sheet option, hit save then select to view the dashboard again and “Export to Excel”



Copyright © 2010 CA. All rights reserved.

lab demo

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



Investment ID	Manager
ERP Roll-Out	Yee, Bill
Uninstall master	George, Jane
proj_4_forms	Administrator, Niku
Uninstall (sub)	George, Jane
Upgrade (duration)	George, Jane
Upgrade (effort)	George, Jane
Master	George, Jane
testid	Administrator, Niku
Upgrade_manual	George, Jane

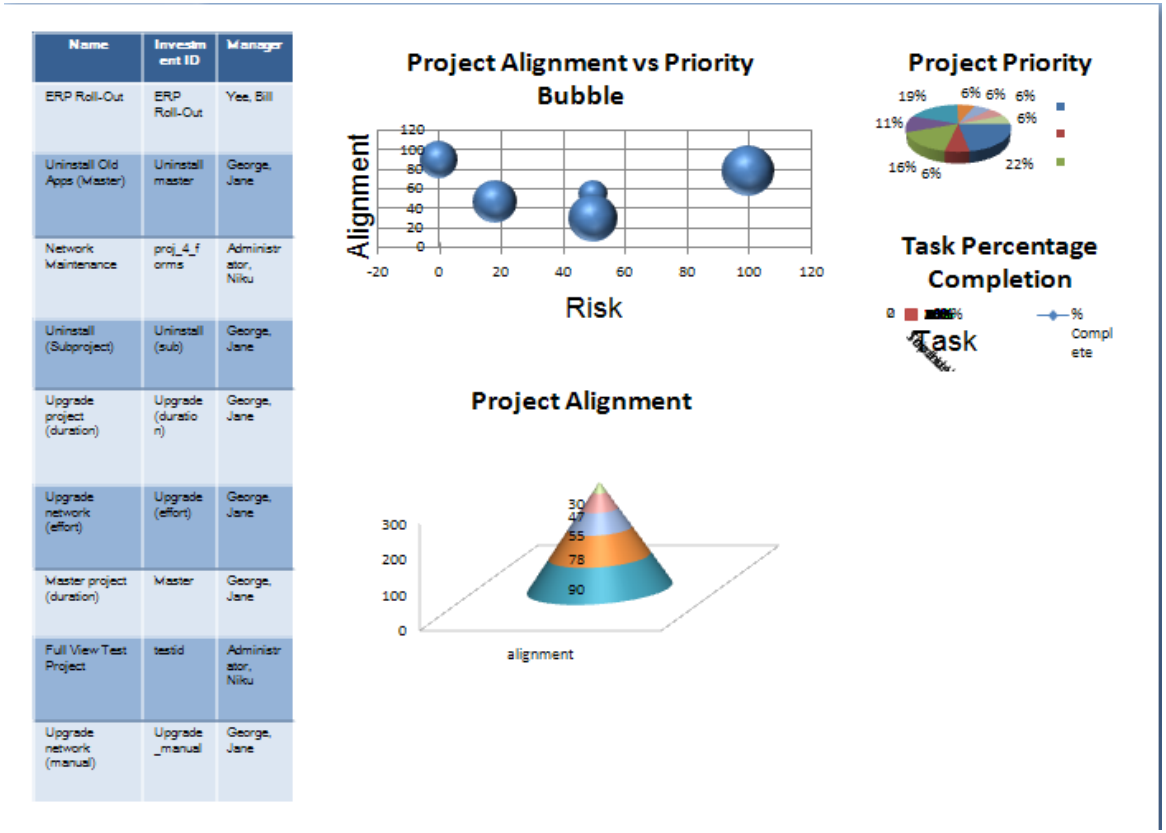
Name	risk
100	100
50	50
18	18.18182
0	0
50	50

Series	X-Values	Y-Values	Size
project	100	78	35
	50	55	10
	18.18182	47	25
	0	90	18
	50	30	30

Copyright © 2010 CA. All rights reserved.

lab demo

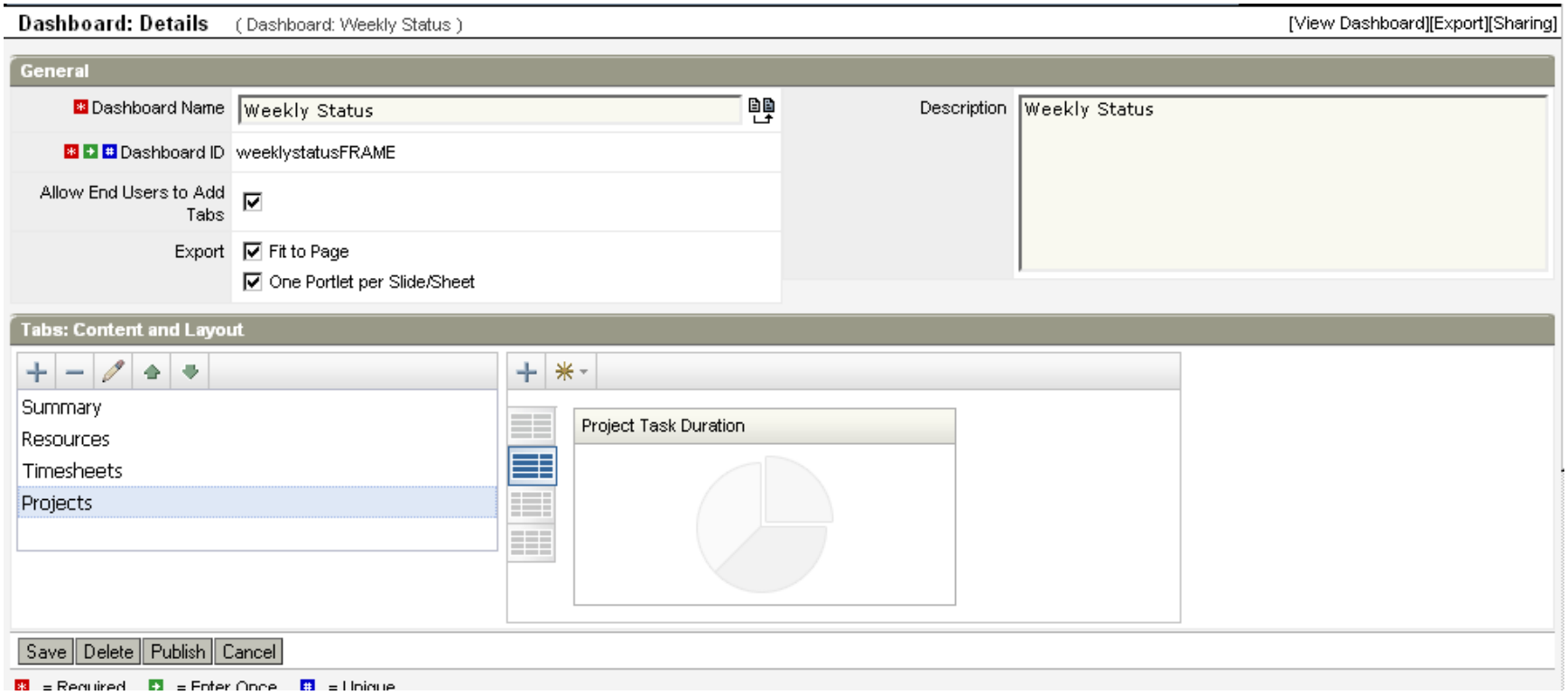
If you decide to export to PowerPoint this way, you may need to tailor your dashboard to allow for space limitations. Choose portlets that will fit together nicely within one slide …



Copyright © 2010 CA. All rights reserved.

lab demo

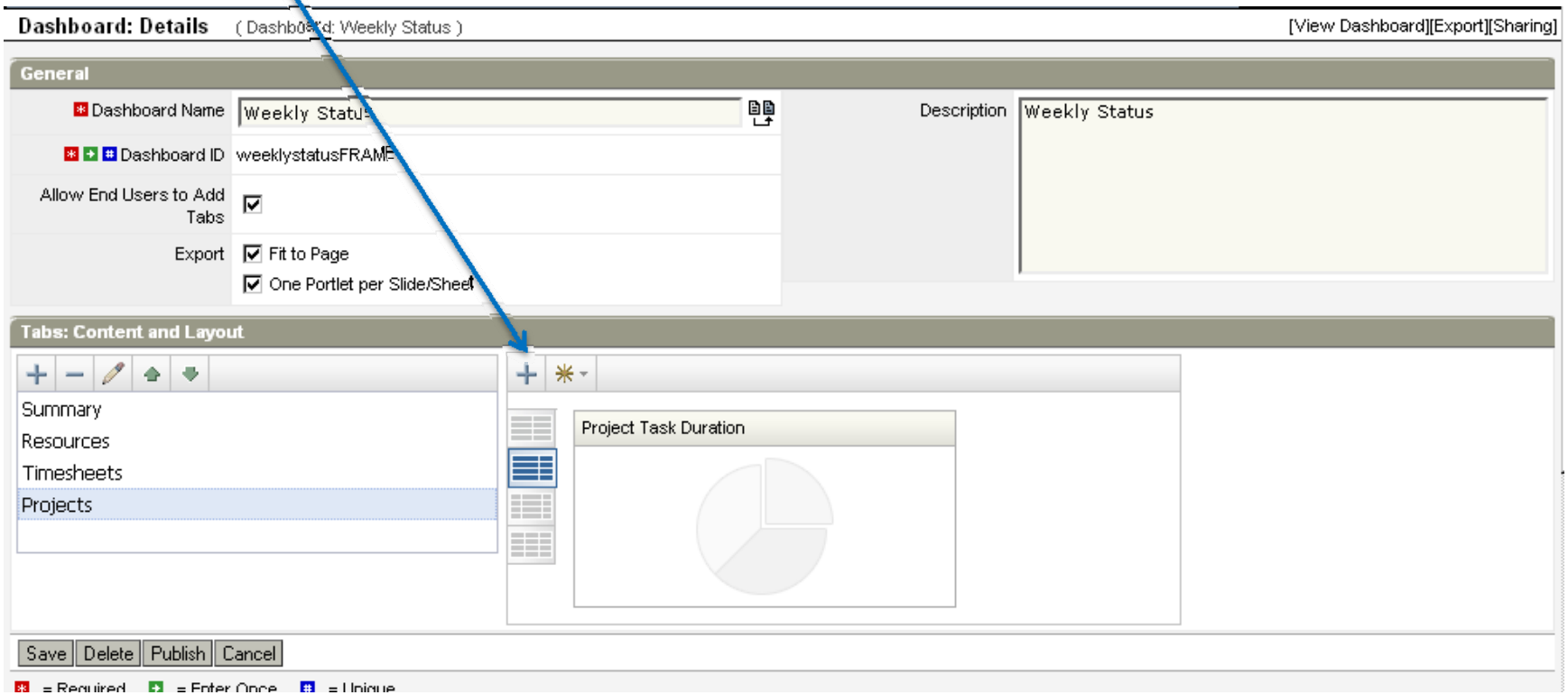
Navigate back to the "Weekly Status" dashboard in design mode and let's add a new portlet to the Projects tab…



 Copyright © 2010 CA. All rights reserved.

lab demo

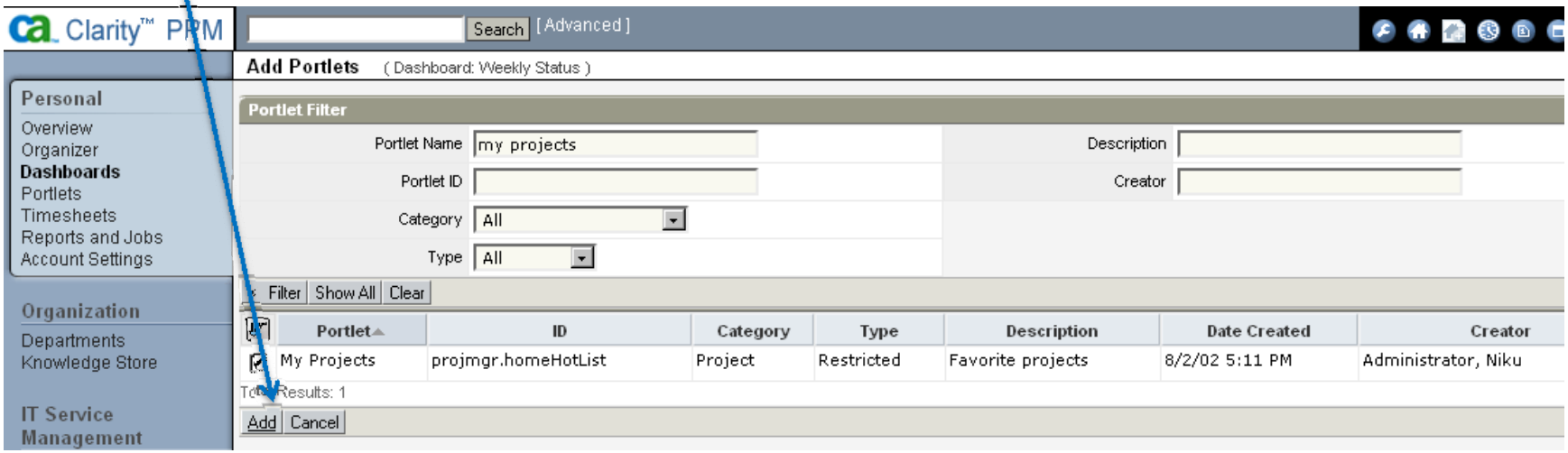
Click on the ✚ in the content window so we can choose an existing portlet…



Copyright © 2010 CA. All rights reserved.

lab demo

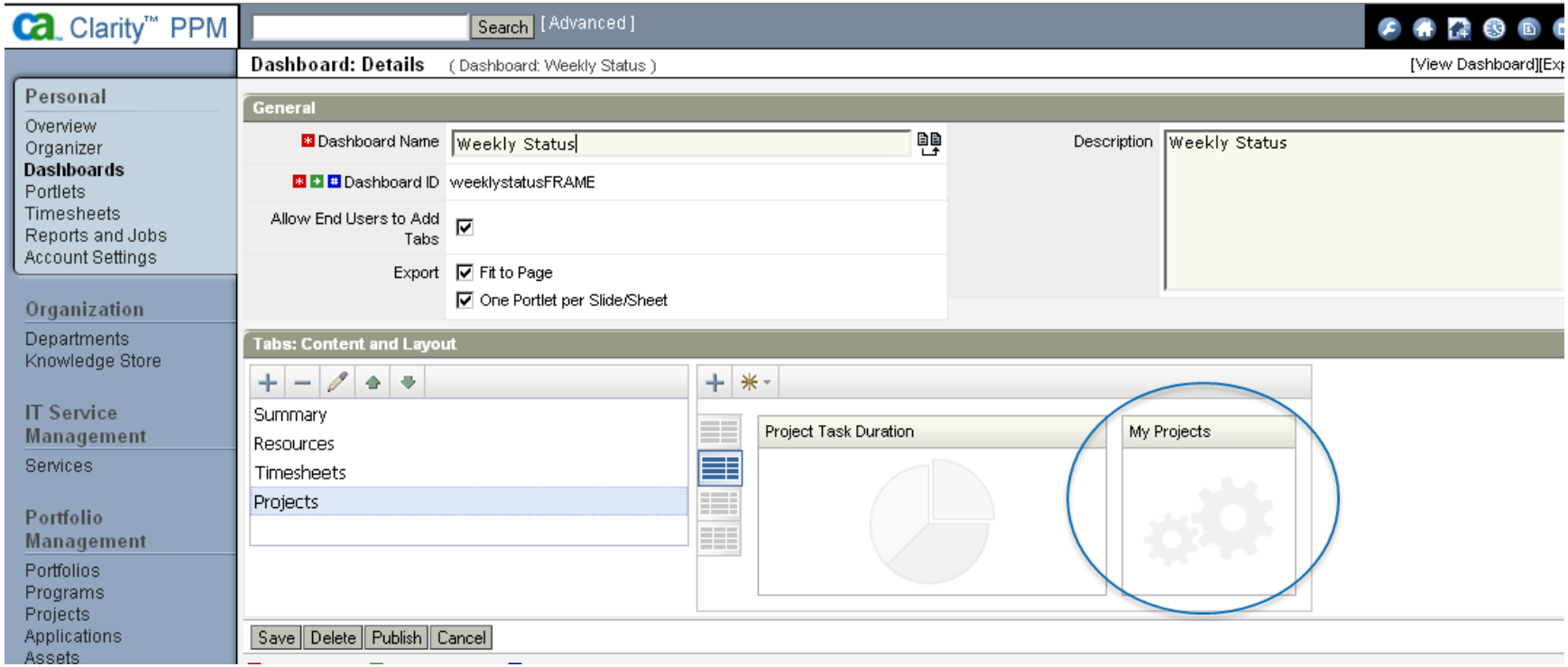
Search for the “my projects” portlet and select it then click on “Add”…



 Copyright © 2010 CA. All rights reserved.

lab demo

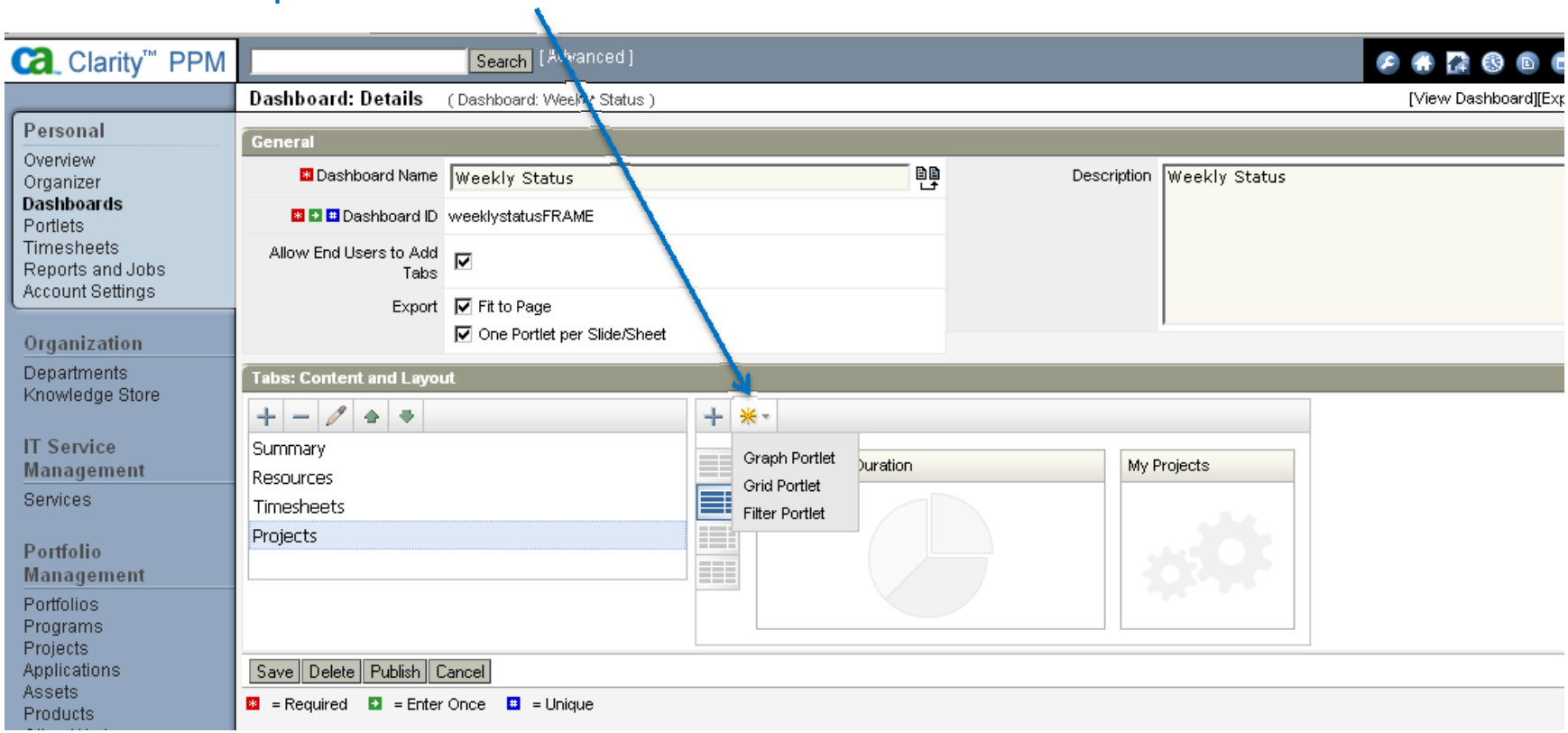
Notice that the portlet has now been added to your page. The "gears" icon denotes this portlet is system restricted…



Copyright © 2010 CA. All rights reserved.

lab demo

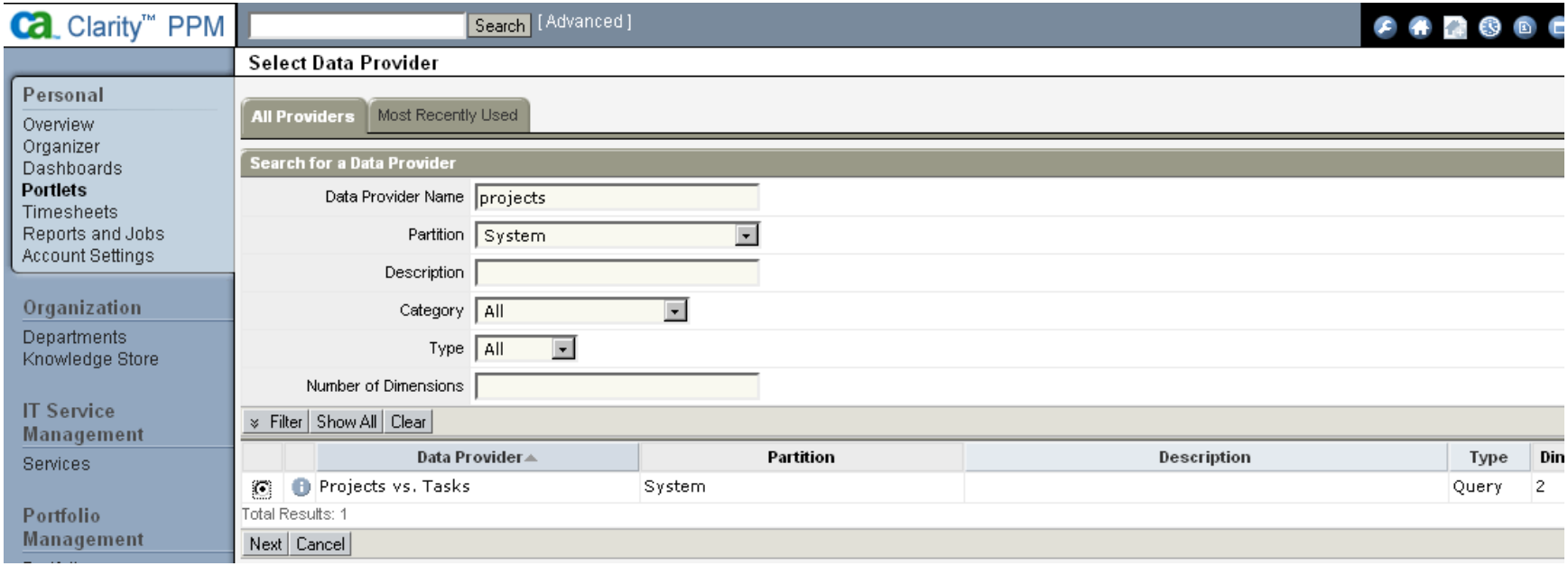
Let's create one of our own. Click on the new portlet icon below and choose "Graph Portlet"…



Copyright © 2010 CA. All rights reserved.

lab demo

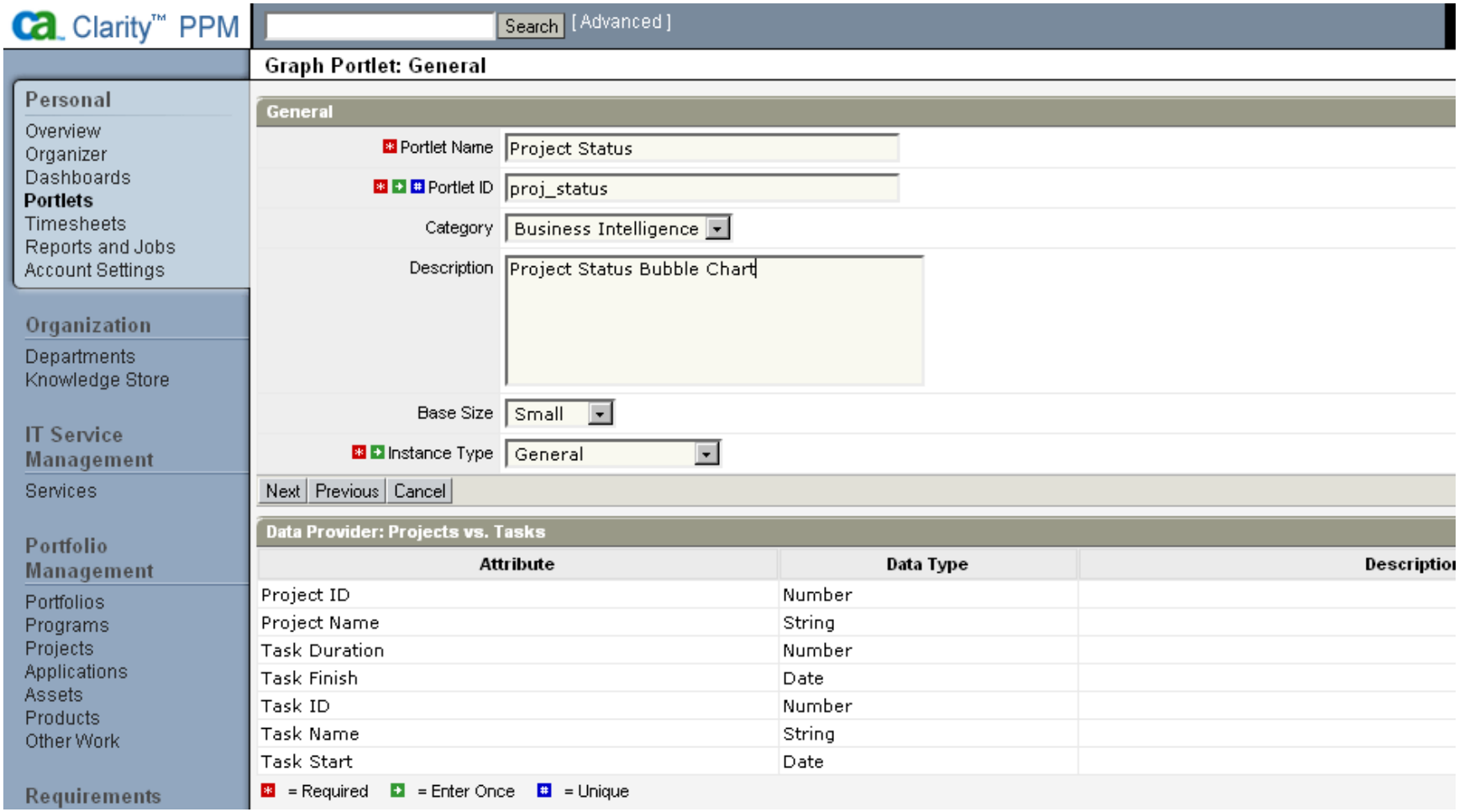
Now we need to choose a data provider. Let's use the NSQL query "Projects vs. Tasks". Filter for "projects" select your data provider, then click "Next"…



Copyright © 2010 CA. All rights reserved.

lab demo

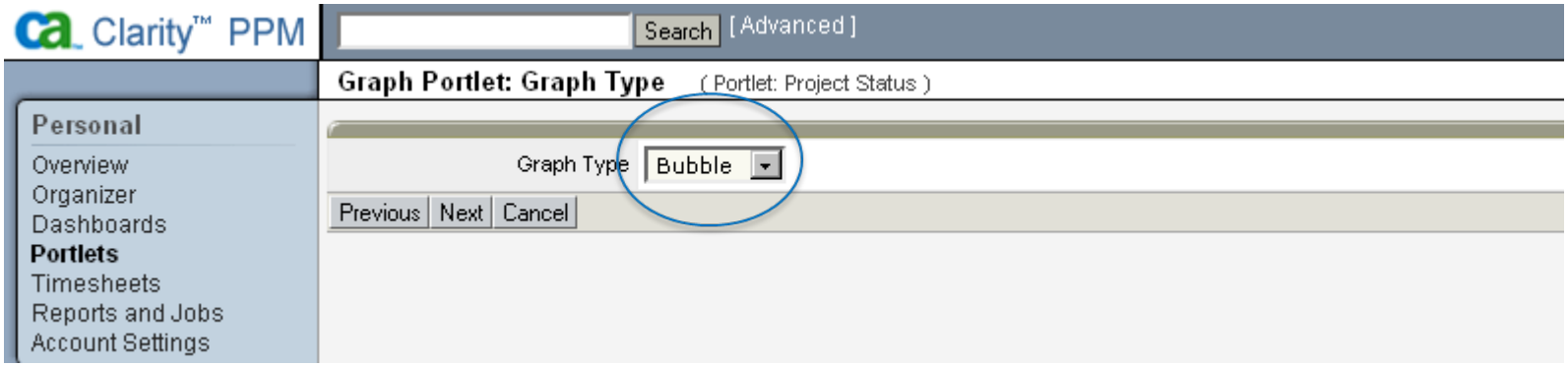
Fill out the required fields and click “Next”…



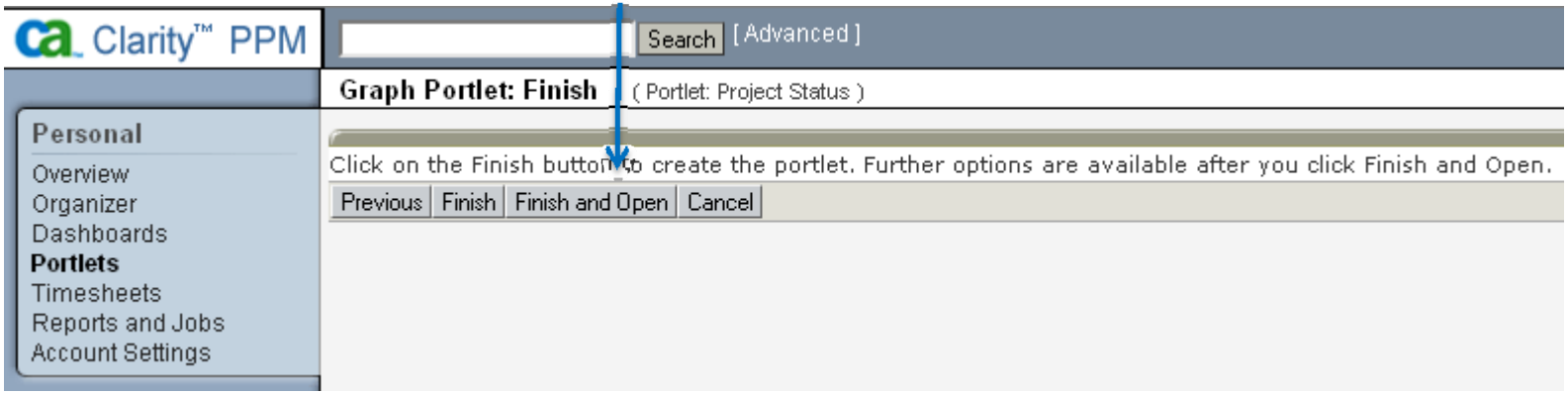
 Copyright © 2010 CA. All rights reserved.

lab demo

Select your graph type and click “Next”…



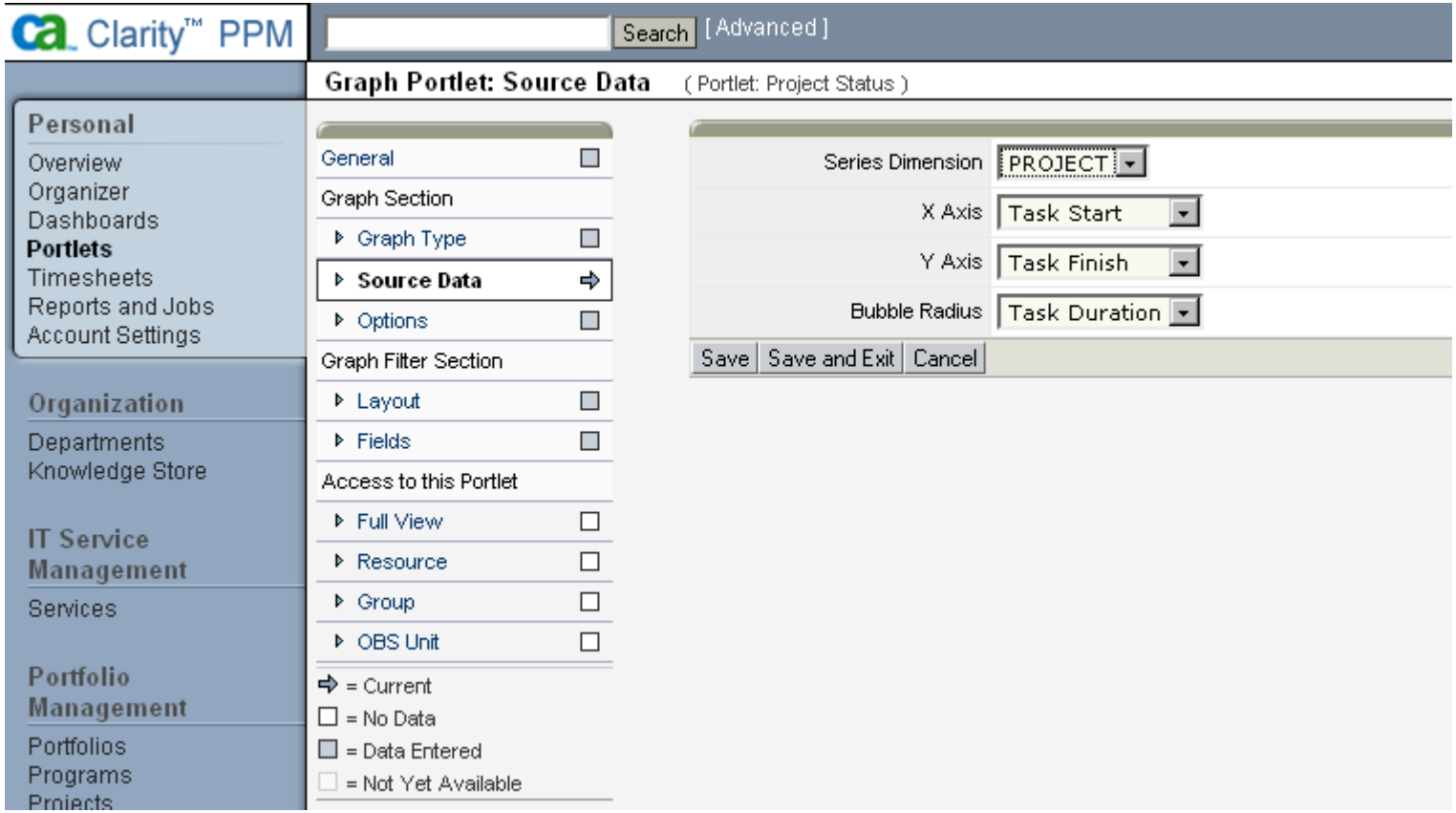
Click on “Finish and Open”…



Copyright © 2010 CA. All rights reserved.

lab demo

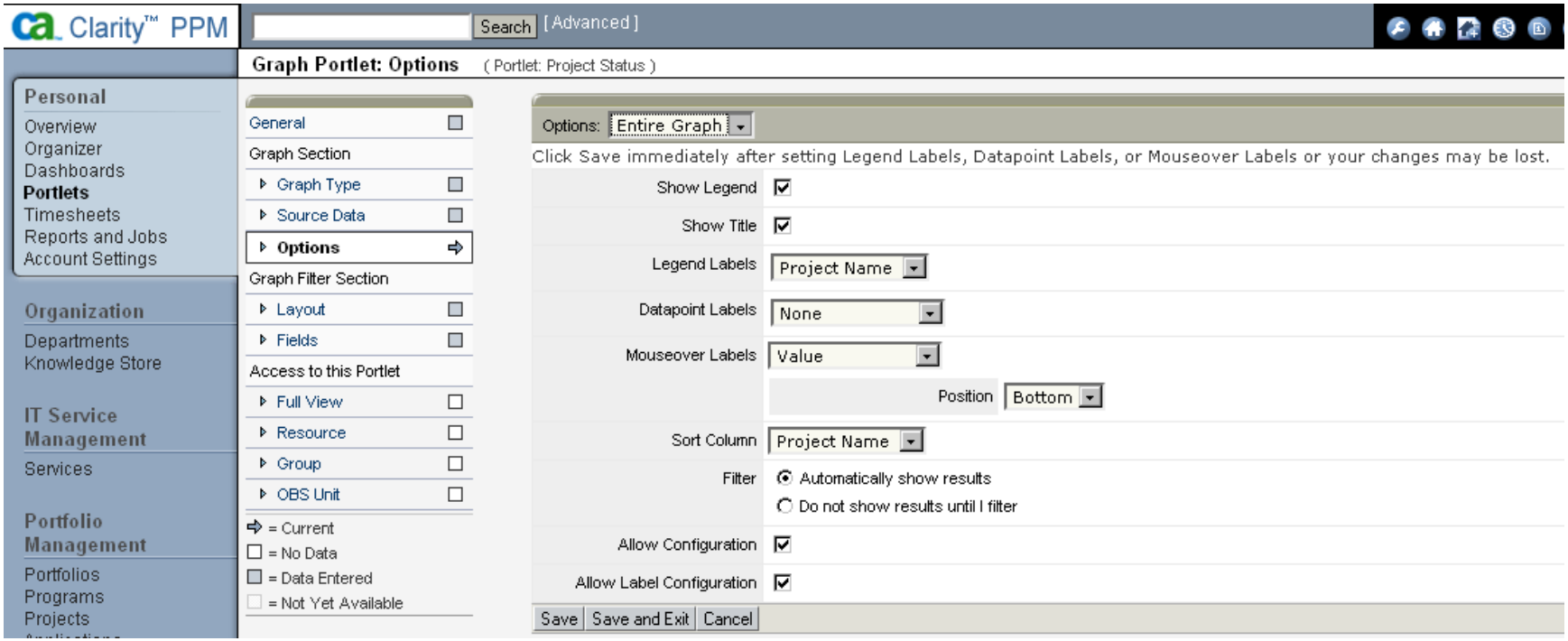
Click on the “Source Data” link and set the “Series Dimension” to “PROJECT” then click “Save ”…



 Copyright © 2010 CA. All rights reserved.

lab demo

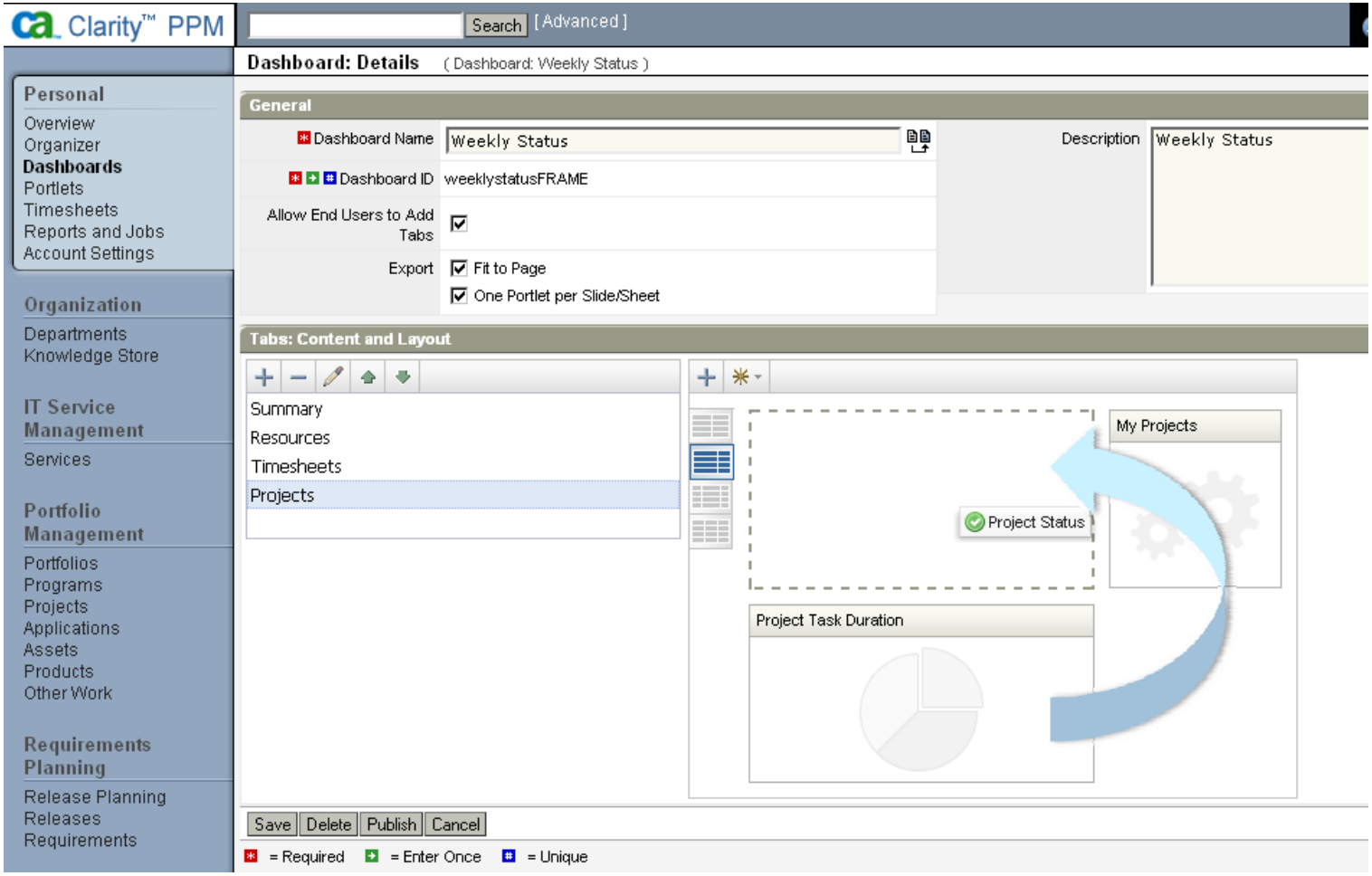
Click on the “Options” link, select the values below then click “Save and Exit”…



 Copyright © 2010 CA. All rights reserved.

lab demo

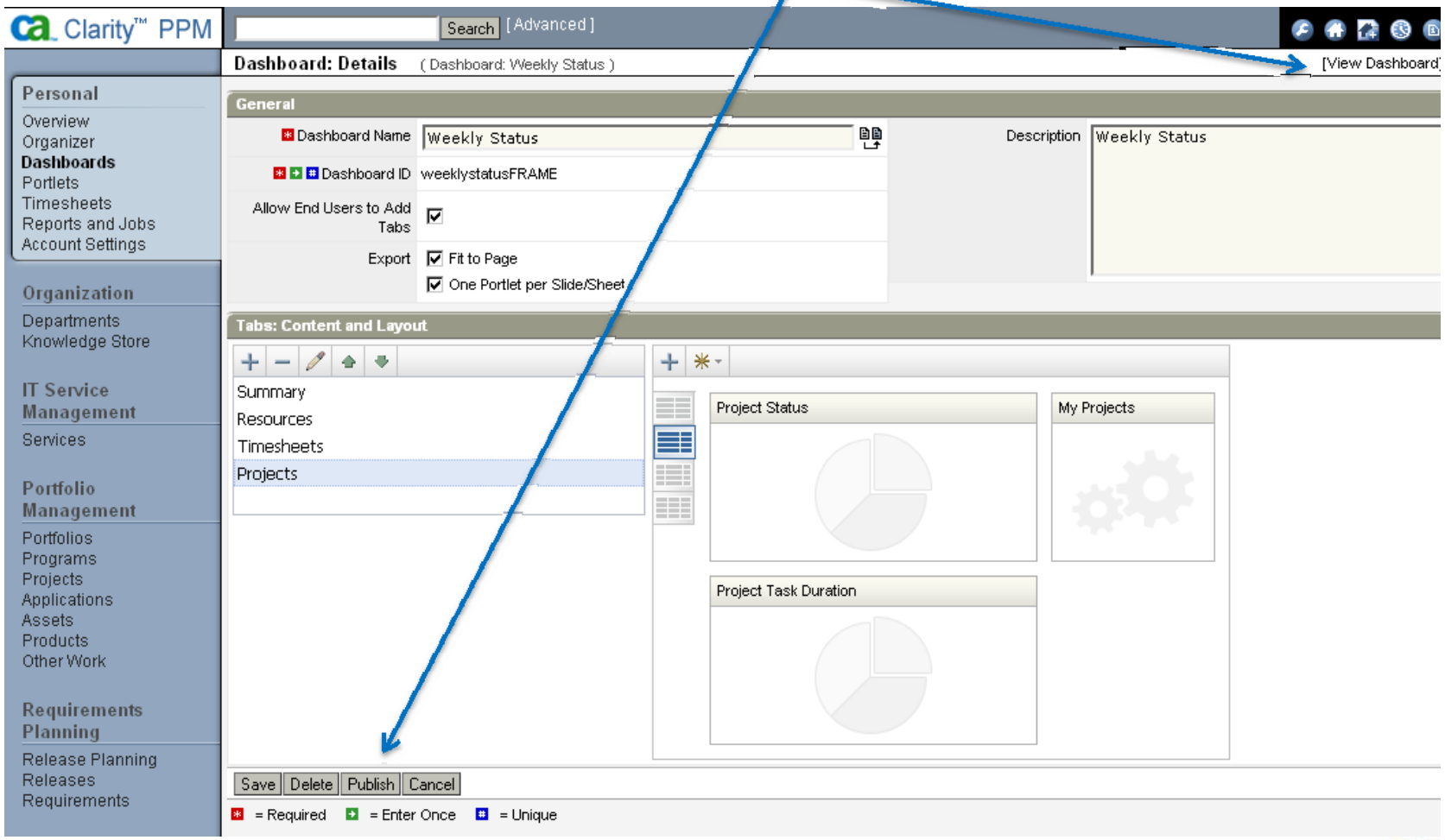
Return to the “Weekly Status” dashboard design view (Projects tab) and you’ll see your new portlet. Grab it with your mouse and drag-n-drop it up to the top…



 Copyright © 2010 CA. All rights reserved.

lab demo

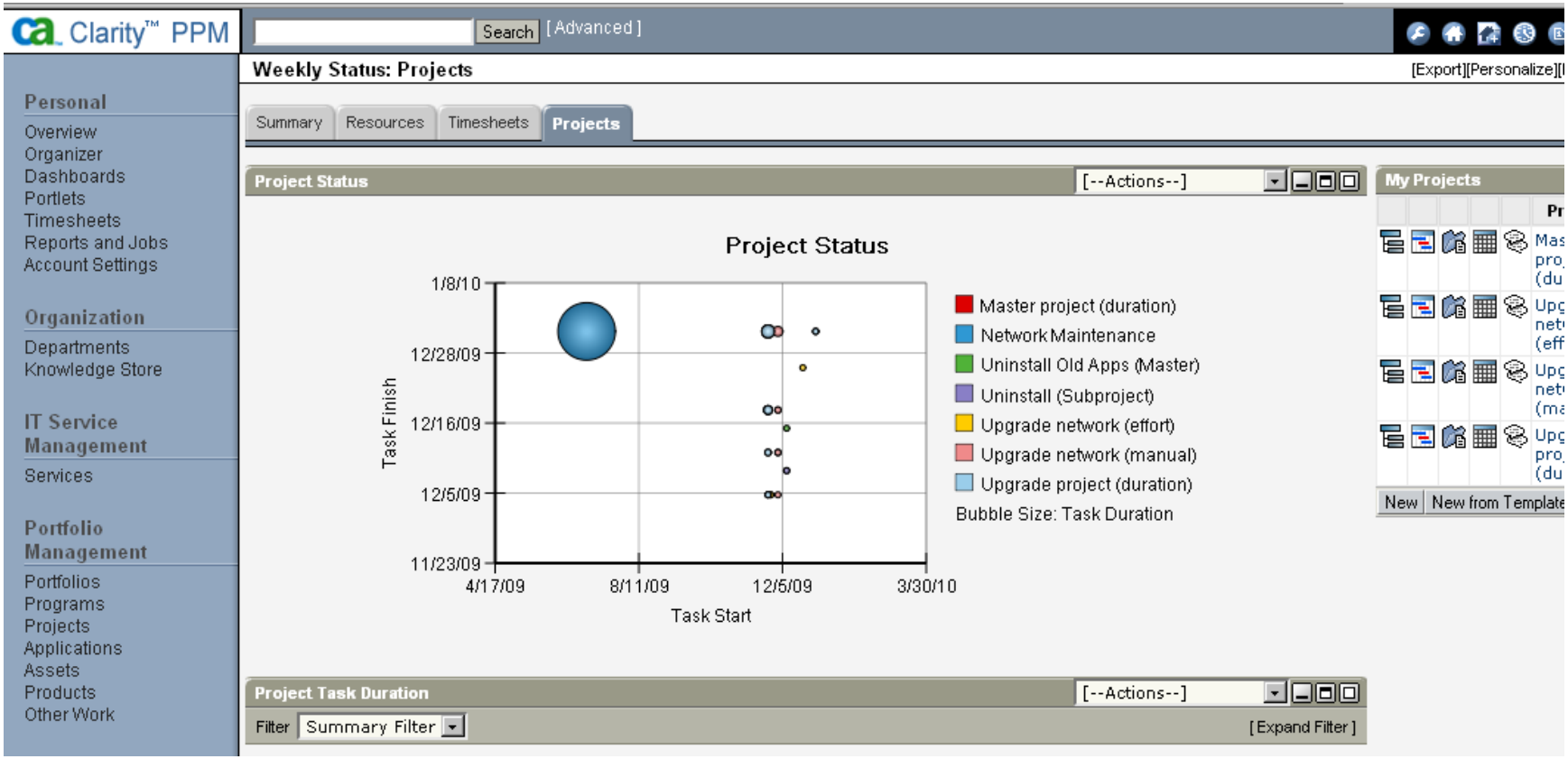
Now save your changes, then click “Publish” (confirm the new layout when prompted), Then click on “View Dashboard”…



Copyright © 2010 CA. All rights reserved.

lab demo

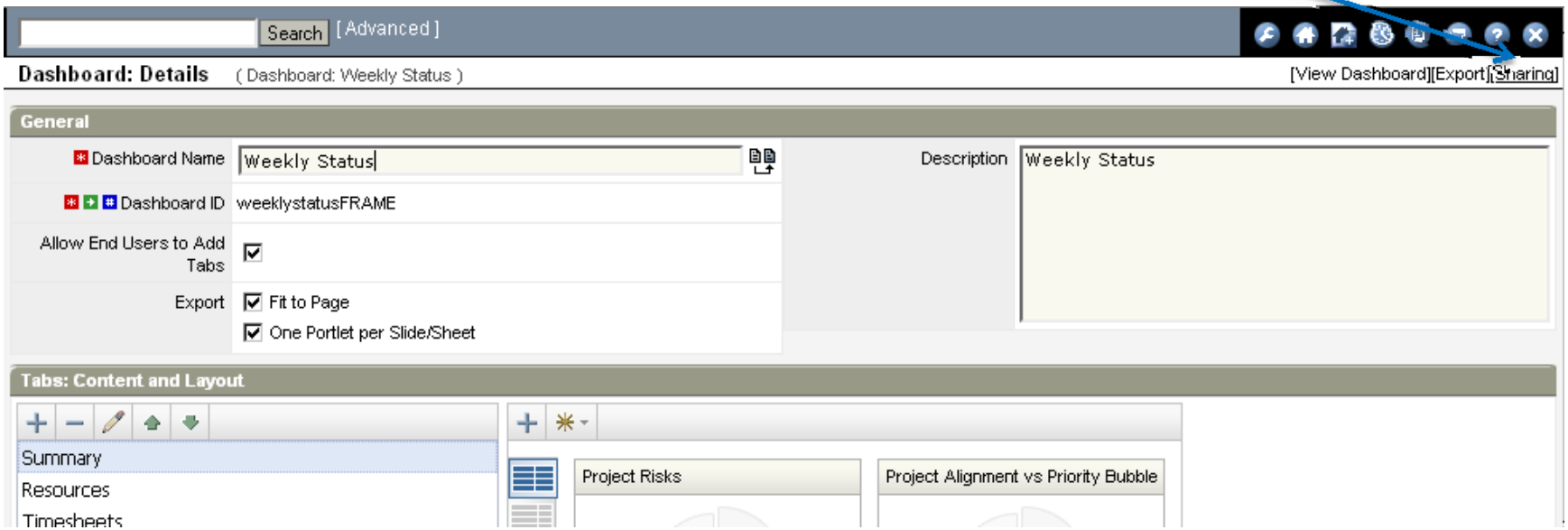
And there's your new portlet in action…



 Copyright © 2010 CA. All rights reserved.

lab demo

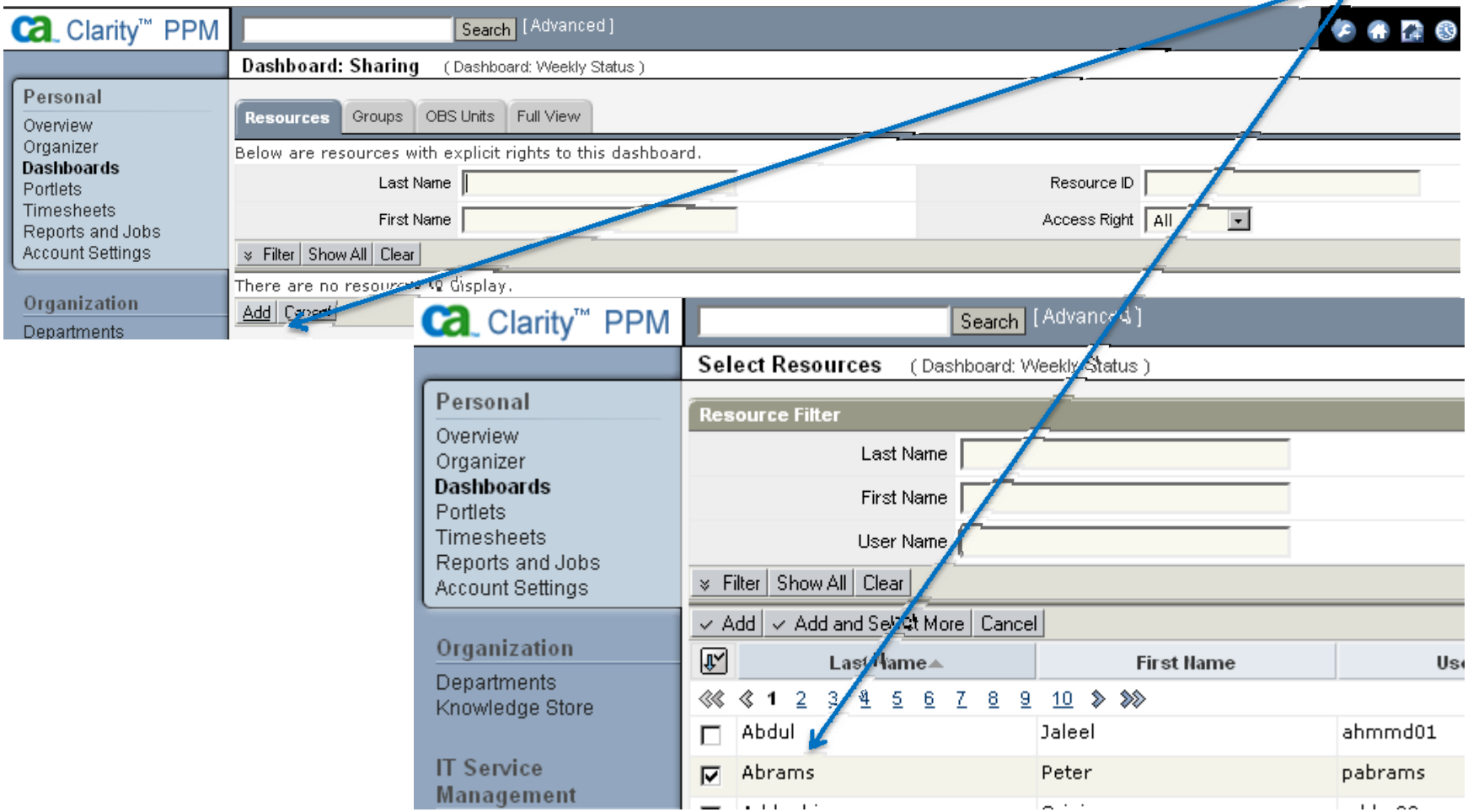
Let's share this dashboard with another resource. Return to the dashboard design window and click on the "Sharing" link …



Copyright © 2010 CA. All rights reserved.

lab demo

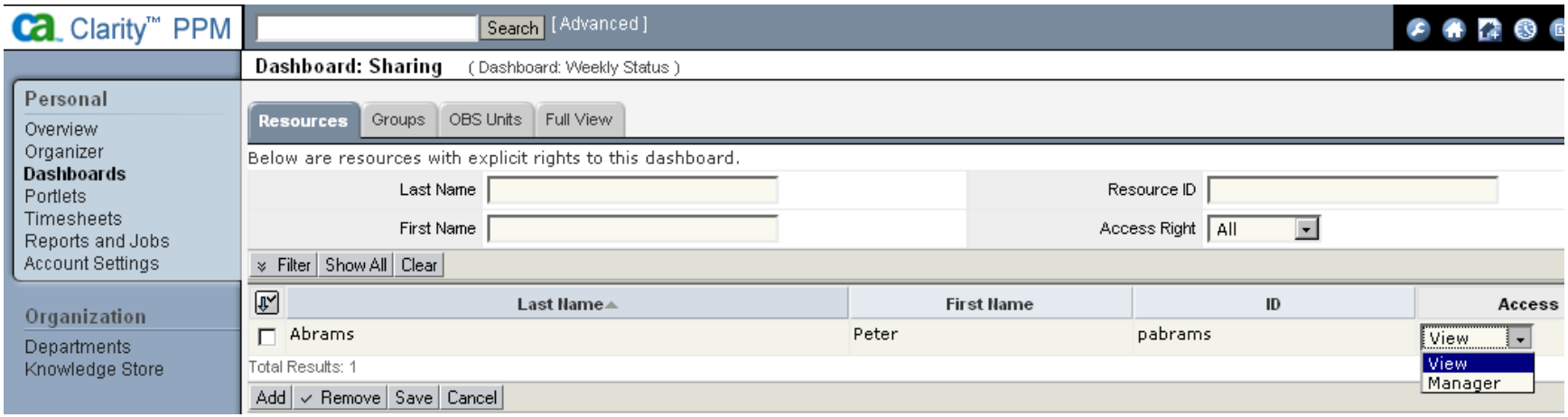
Click on “Add” to bring up a list of the resources and select Peter Abrams…



 Copyright © 2010 CA. All rights reserved.

lab demo

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



 Copyright © 2010 CA. All rights reserved.

best practices

best practices

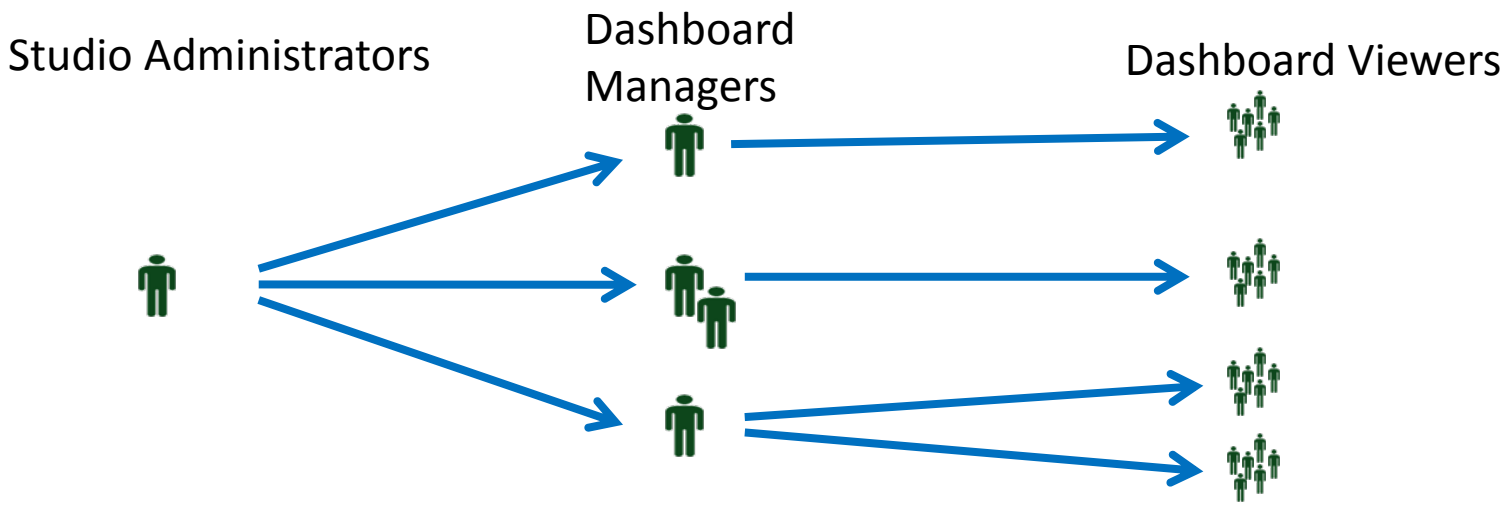
– Define the scope of responsibilities for the dashboard managers (DM)

- 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

 Copyright © 2010 CA. All rights reserved.

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

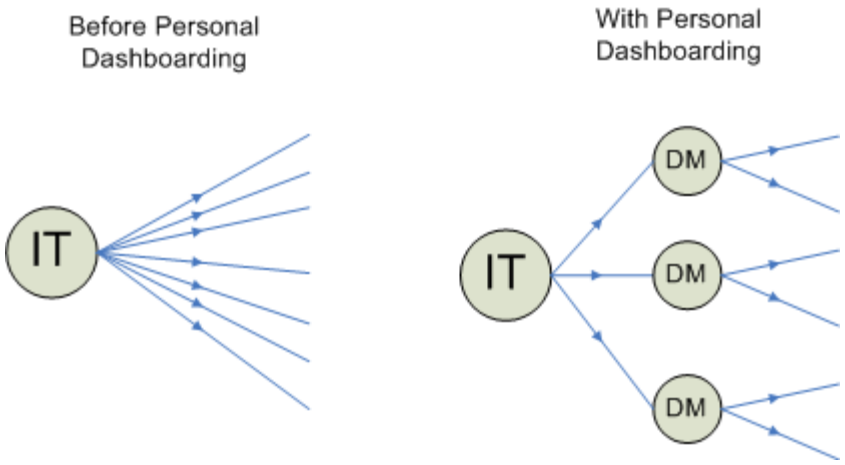


Copyright © 2009 CA

best practices

– Give the dashboard managers (DM) the authority to carry out their responsibilities

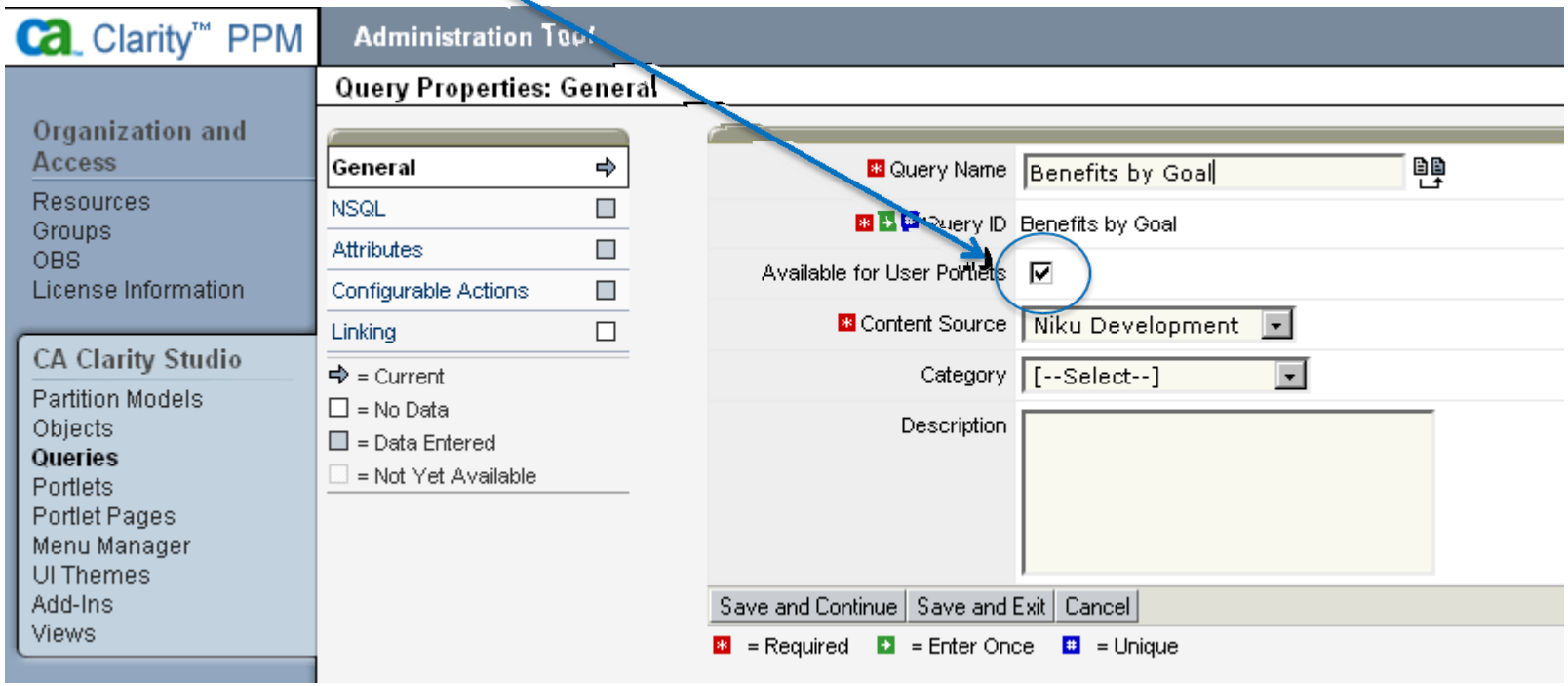
- Grant access to a portlet or instance
- Train on how to use Personal Dashboarding
- Empower the end-users to manage their data in order to allow them faster access to the get the data they need



 Copyright © 2010 CA. All rights reserved.

best practices

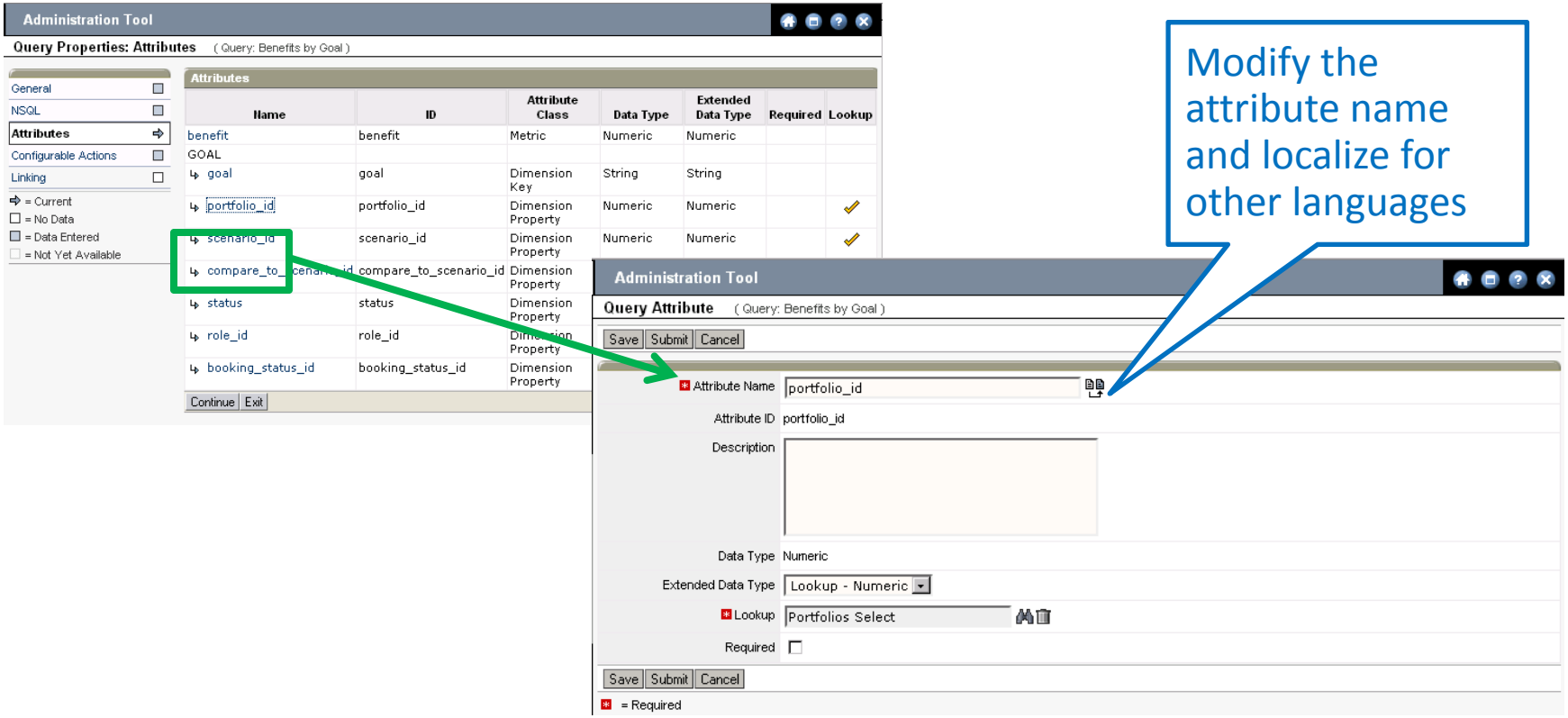
Remember to hide any data providers you do not want visible to your dashboard creators…



 Copyright © 2009 CA

best practices

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



Copyright © 2009 CA

Q&A

additional documentation

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

 Copyright © 2009 CA

documentation

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.

Copyright © 2009 CA

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.

 Copyright © 2009 CA

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 check box 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.

 Copyright © 2009 CA

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

Copyright © 2010 CA. All rights reserved.

thank you

terms of this presentation

This presentation was based on current information and resource allocations as of May 14, 2010 and is subject to change or withdrawal by CA at any time without notice. Notwithstanding anything in this presentation to the contrary, this presentation shall not serve to (i) affect the rights and/or obligations of CA or its licensees under any existing or future written license agreement or services agreement relating to any CA software product; or (ii) amend any product documentation or specifications for any CA software product. The development, release and timing of any features or functionality described in this presentation remain at CA's sole discretion. Notwithstanding anything in this presentation to the contrary, upon the general availability of any future CA product release referenced in this presentation, CA will make such release available (i) for sale to new licensees of such product; and (ii) to existing licensees of such product on a when and if-available basis as part of CA maintenance and support, and in the form of a regularly scheduled major product release. Such releases may be made available to current licensees of such product who are current subscribers to CA maintenance and support on a when and if-available basis. In the event of a conflict between the terms of this paragraph and any other information contained in this presentation, the terms of this paragraph shall govern.

 Copyright © 2010 CA. All rights reserved.

for information purposes only

CA does not provide legal advice. Neither this document nor any software product referenced herein shall serve as a substitute for the reader's compliance with any laws (including but not limited to any act, statue, regulation, rule, directive, standard, policy, administrative order, executive order, etc. (collectively, "Laws")) referenced herein. The reader should consult with competent legal counsel regarding any such Laws."

 Copyright © 2010 CA. All rights reserved.