Oracle

Primavera

Portfolio Management Application Administration Guide

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Contents

Overview

After using the *PPM System Administration Guide* to enable supporting technologies, use this guide to configure specific PPM behavior for your organization, before users begin to work with the application.

Managing Personally Identifiable Information

This chapter describes how to enable privacy and cookie policies, enable consent notices for users, and audit consent notices to manage personally identifiable information (PII) in Primavera Portfolio Management.

In This Section

About Consent Notices

Consent notices enable you to convey to your users how personally identifiable information (PII) is collected, processed, stored, and transmitted, along with details related to applicable regulations and policies. Consent notices also alert users that the action they are taking may risk exposing PII. Primavera Portfolio Management helps you to ensure that you have requested the appropriate consent to collect, process, store, and transmit the PII your organization holds as part of Primavera Portfolio Management data.

Consent notices should:

- be written in clear language which is easy to understand.
- provide the right level of detail.
- identify the purpose and legal basis for your collection, processing, storage, and transmission of PII.
- identify whether data will be transferred to named third parties.
- identify PII categories and list the data which will be collected, processed, stored, and transmitted.

About Personally Identifiable Information

Personally identifiable information (PII) is any piece of data which can be used on its own or with other information to identify, contact, or locate an individual or identify an individual in context. This information is not limited to a person's name, address, and contact details. For example a person's IP address, phone IMEI number, gender, and location at a particular time could all be personally identifiable information. Depending on local data protection laws organizations are responsible for ensuring the privacy of PII wherever it is stored, including in backups, locally stored downloads, and data stored in development environments.

Cookies Usage in Primavera Portfolio Management

View the details below for information on when cookies are created and stored when using Primavera Portfolio Management. As stated in the *Reliability for Primavera Portfolio Management* topic in the *Security Guide*, set a maximum age for the session cookie on the application server.

Oracle might use cookies for authentication, session management, remembering application behavior preferences and performance characteristics, and to provide documentation support.

Also, Oracle might use cookies to remember your log-in details, collect statistics to optimize site functionality, and deliver marketing based on your interests.

Your Responsibilities

Information security and privacy laws can carry heavy penalties and fines for organizations which do not adequately protect PII they gather and store. If these laws apply to your organization, it is your responsibility to configure consent notices before they are required. You should work with your data security and legal teams to determine the wording of the consent notices you will configure in Primavera Portfolio Management.

If a consent notice is declined, it is your responsibility to take any necessary action. For example, you may be required to ensure that the data is not stored or shared.

> **Note**: There is no provision to delete *all* information associated with an user when they leave the application.

PII Data in Primavera Portfolio Management

PII may be visible in multiple areas of Primavera Portfolio Management, including but not limited to user administration, resource and role administration, portfolios, assignments, reports, user defined fields, and codes.

PII may be at risk of exposure in multiple areas of Primavera Portfolio Management, including but not limited to portfolio, export, reports, documents, web services, and API.

Configuring Privacy and Cookie Policies

To configure privacy and cookie policies:

1) In the **Administration** menu, click **Admin**.
2) Click the **Access / Privacy** tab.
3) Click **Enable Privacy Policy.**
4) Click **Edit...**.for **Privacy Policy / Cookie Policy Settings**.
5) To configure the privacy policy, click **Use External Privacy Policy Web Page** or **Configure Privacy Policy Page**.
    a. If you chose **Use External Privacy Policy Web Page**:
        1. In the **Web Page URL** field, enter the URL of the privacy policy.

2. Click **Test** to ensure the link is active.

b. If you chose **Configure Privacy Policy Page**:

1. In the text area, enter the privacy policy finalized by your organization.
2. Click **Preview** to test the configured privacy policy.

c. Click **Save**.

6) To configure the cookies policy, click **Use External Cookie Policy Web Page** or **Configure Cookie Policy Page**.

a. If you chose **Use External Cookie Policy Web Page**:

1. In the **Web Page URL** field, enter the URL of the cookie policy that is to be displayed.
2. Click **Test** to ensure the link is active.

b. If you chose **Configure Cookie Policy Page**:

1. In the text area, enter the cookie policy finalized by your organization.
2. Click **Preview** to test the configured cookie policy.

c. Click **Save**.

Configuring Consent Notices for New Users and Administrators

To configure consent notices for new users and administrators:

1) In the **Administration** menu, click **Admin**.
2) Click the **Access / Privacy** tab.
3) Click **Enable Privacy Notice**.
4) Click **New User Consent Settings** and then click **Edit...**.
5) Click **Use External Web Page** or **Configure Consent Page.**

a. If you chose **Use External Web Page:**

1. In the **Web Page URL** field, enter the *URL* of the consent page.
2. Click **Test** to ensure the link is active.

b. If you chose **Configure Consent Page:**

1. Enter the consent notice finalized by your organization in the **Configure Consent** area.
2. Click **Preview** for the consent notice.

6) Click **Save.**

Configuring Consent Notices for Existing Users

To configure consent notices for existing Primavera Portfolio Management users:

1) In the **Administration** menu, click **Admin**.
2) Click the **Access / Privacy** tab.
3) Click **Enable Privacy Policy**.
4) Click **Existing User Consent Settings** and then click **Edit...**.
5) Click **Use External Web Page** or **Configure Consent Page**.

a. If you chose **Use External Web Page**:

1. In the **Web Page URL** field, enter the URL of the consent notice.
2. Click **Test** to ensure the link is active.

b. If you chose **Configure Consent Page**:

1. Enter the consent notice in the **Configure Consent** area.
2. Click **Preview** to test the configured privacy policy.

6) Click **Save**.
7) To give consent on behalf of existing users:
   a. Click **Admin Consent** and then click **Edit...**.
   b. Select all users on behalf of whom you are giving consent.
   c. Select **I agree and provide consent on behalf of selected users**.
   d. Click **OK**.

   Users will have a *Consent Provided* status when they next sign in to the application.

   Note: If an administrator provides consent on behalf of other users, it is the administrator's responsibility to ensure the consent has been provided by the users through other means.

8) To request consent from users individually:
   a. Click **Individual User Consent**.
   b. Click **Save**.

   Users will have a *Consent Pending* status when they next sign in to the application.

Auditing Consent Notices in Primavera Portfolio Management

To audit and review the consent status of all users:

1) In the **Administration** menu, click **Admin**.
2) Click the **Access / Privacy** tab.
3) Click **Activate Audit Log** and then click **Edit...**.
4) In the **Audit** column, click the checkbox for the **Privacy Audit Log** event.
5) Click **OK**.

Customizing the Spelling Checker

You can customize the spelling checker functionality that is built into PPM.

Note: In a distributed installation ("Scale Out"), you should apply the same customizations on all PPM application servers.

In This Section

Setting Up an Organizational Custom Dictionary

You can configure the spelling checker to check words against an organizational vocabulary.

1) Using Notepad, create a text file containing one word per line, without extraneous spaces. The order of the words in the file is not important. Only single-byte ANSI (Latin1) characters should be used, and the file should be saved with ANSI encoding. The first line of this file must be the following:

    ```
    #LID 30840
    ```

    The words in the custom dictionary must follow this first line. Here is an example custom dictionary containing three words:

    ```
    #LID 30840
    dog
    cat
    horse
    ```

    Be careful when entering words: misspelled words will compromise the effectiveness of the spelling checker for all users. Also note that changes made to custom dictionaries that are already in use will have no effect until PPM is restarted. There is no way to dynamically add words to organizational custom dictionaries at run time without stopping and starting Primavera Portfolio Management.

    Save the text file in the **Dictionaries** folder off the PPM install directory. By default, this folder would be located at C:\Program Files\Oracle\Primavera Portfolio Management\Portfolios\Dictionaries.

2) Using Registry Editor, locate the registry string value:

    ```
    HKEY_LOCAL_MACHINE\SOFTWARE\Oracle\Primavera Portfolio
    Management\Portfolios\Server\SpellingServer\Languages\24941\Dictiona
    ries
    ```

    This string value contains the file names of the dictionaries that the spelling checker checks words against. Add a semicolon and the name of the file you created in step 1 (including extension but without path) to the end of the string value of this registry entry.

As an example, if the name of the file you created in step 1 is "orgcust.txt", the value of the registry entry would need to be:

`ssceam.tlx;ssceam2.clx;correct.tlx;tech.tlx;`*orgcust.txt*

(the required addition has been *emphasized* here for extra clarity only).

3) To apply the change, restart PPM.

By repeating the above steps with files saved under different names, you can use multiple custom dictionaries.

Configuring the Spelling Checker for Languages Other than US English

You can configure the spelling checker to use spelling for English locales other than the United States, or to configure the spelling checker to use dictionaries for other languages.

The various English locales supported are:

Locale	Registry Value for "Dictionaries"
US English	`ssceam.tlx;ssceam2.clx;correct.tlx;tech.tlx`
UK English	`sscebr.tlx;sscebr2.clx;correct.tlx;tech.tlx`
Canadian English	`sscebr.tlx;ssceca2.clx;correct.tlx;tech.tlx`

The dictionary files needed for these English locales are installed on the server by default.

To configure the spelling checker to use one of these English locales, do the following:

1) Using Registry Editor, locate the registry string value:

   `HKEY_LOCAL_MACHINE\SOFTWARE\Oracle\Primavera Portfolio Management\Portfolios\Server\SpellingServer\Languages\24941\Dictionaries`

   This string value contains the file names of the dictionaries that the spelling checker checks words against. Replace the existing value with the value listed in the above table for the desired locale.

   If you also use one or more organizational custom dictionaries, please follow the steps in the previous section to add the necessary file names to the string value.

2) To apply the change, restart PPM.

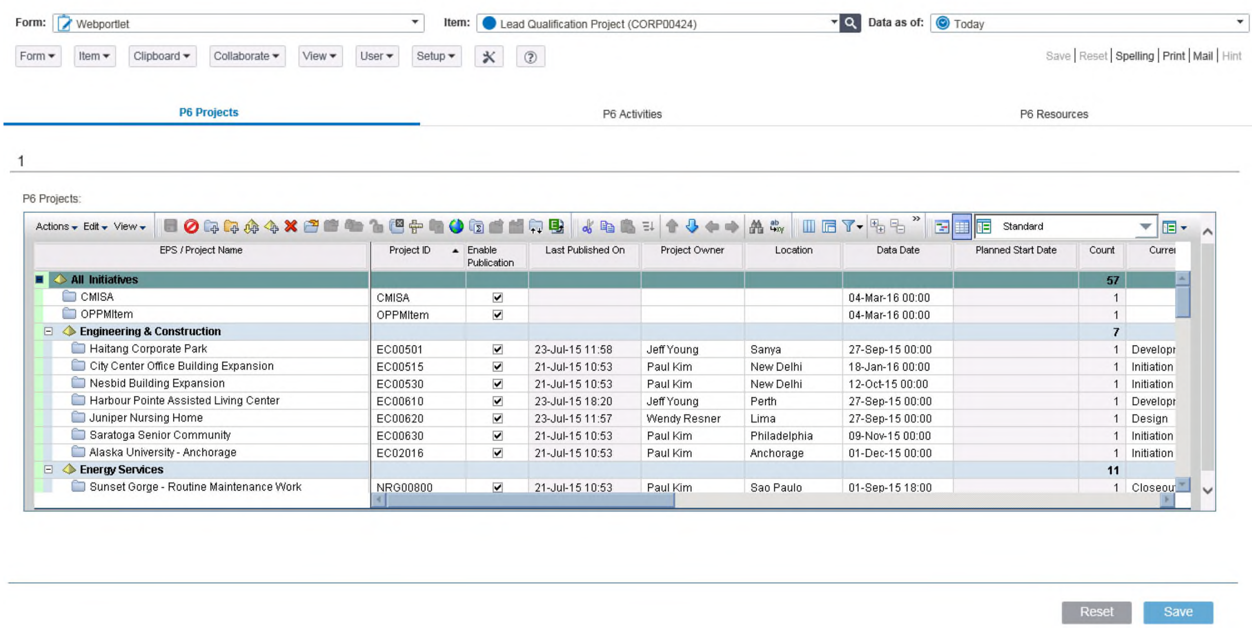
To obtain dictionary files for languages or locales other than listed above, please contact Oracle.

Configuring Web Portlets for P6

The Web Portlet can be set to display P6 views. By adding different parameters in the URL, the form designer can control which type of view will be displayed from a selected project.

In the following example the Web Portlet was set to display the schedule and resource information of the item by displaying the Project View from Primavera P6 views. This view shows the activities of the project together with a Gantt chart:

Figure 1: Sample P6 Projects Portlet



In This Section

Web Portlet Setup

Create a new Web Portlet component in the tab where you want to display P6 Project Information. For more details, refer to the online help.

Three P6 modules can be displayed within the Web portlet:

- **Project Center:** Lists all the projects in a P6 server with one of the available or custom made tables.
- **Project View**: Displays a table and usually a Gantt chart for a selected project.
- **Resource Center**: Lists all the resources available in a P6 server.

It is recommended to set the group box for that web Portlet at 4 quarters size (4/4) and to make sure the Web Portlet component height is enough to provide sufficient display area.

To set the Web Portlet to display information from a P6 server:

1) Click the **Properties** button.
2) In the **Properties** window click **Edit**.
3) in the **Link** field, enter the URL for the P6.

   View and add query strings according to the preferred display mode. Each view type has a different URL, with query strings that also vary according to the preferred view mode and parameters (see details below).
4) Set up the P6 modules within the Web portlet as follows:
   a. To set up the **Project Center** module:
      1. In the **Link** field, enter the following URL:

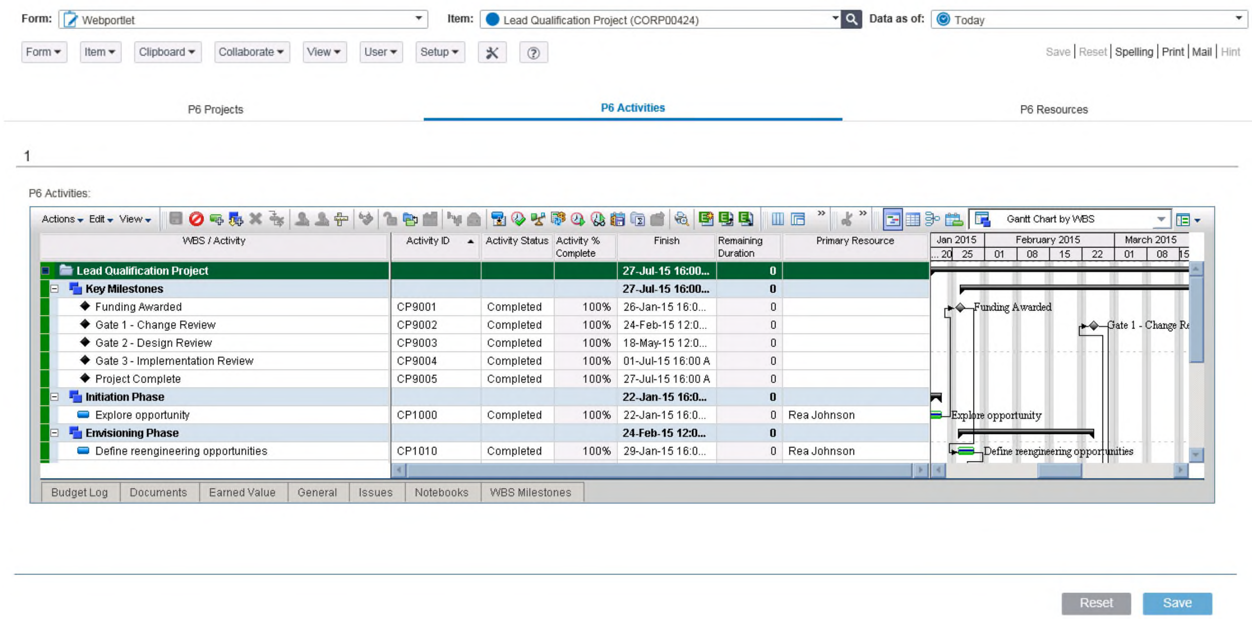
         ```
         http://<PPMServerName>/ProSight/MsProject/PWAView.aspx?
         PWAPage=action/pm/portlet_projects
         ```
      2. Change `<PPMServerName>` with the name of your Primavera Portfolio Management server.
      3. You do not need to enter any details in the query string parameters based on category values table.
      4. Check the **Item ID** check box in the query string parameters based on item properties section and keep the default value given to the parameter name.

   b. To set up the **Project View** module:
      1. In the **Link** field, enter the following URL:

         ```
         http://<PPMServerName>/ProSight/MsProject/PWAView.aspx?
         PWAPage=action/pm/portlet_activities
         ```
      2. Change `<PPMServerName>` to the name of your Primavera Portfolio Management server.

3. Check the **Item ID** check box in the query string parameters based on item properties section and keep the default value given to the parameter name.

Figure 2: Sample P6 Activities Portlet



c. To set up the **Resource Center** module:

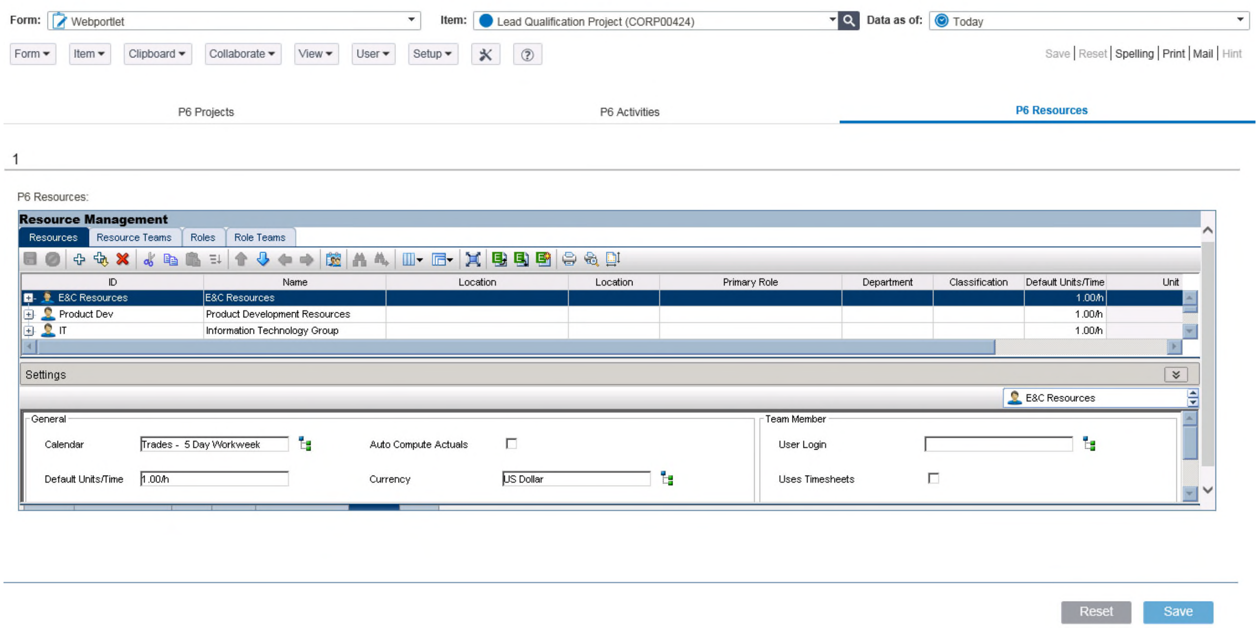
1. In the **Link** field, enter the following URL:

```
http://<PPMServerName>/ProSight/MsProject/PWAView.aspx?
PWAPage=action/resources/portlet_resource_management
```

2. Change <PPMServerName> to the name of your Primavera Portfolio Management server.
3. You do not need to enter any details in the query string parameters based on category values table.
4. Check the Item ID checkbox in the query string parameters based on item properties section and keep the default value given to the parameter name.

5) In the **Description** field, enter a description for the URL. The description is only available in the **Properties** dialog box and in the Form tab wizard, and is used mainly for administration purposes.

Figure 3: Sample P6 Resources Portlet



Notes:

- To view the information in the Web portlet publish it to the P6 server. For more details, refer to the *Online Help*.
- In order for P6 pages to display within Web Portlets, a P6 logged-in session must have already been established by the browser. Do this by either logging in to P6 on another browser tab, or by logging into P6 in the same browser session before switching to the Primavera Portfolio Management URL.
- If the browser has not already authenticated with P6, the P6 login screen will display inside the portlet, and after logging in the entire page will revert to P6.

Configuring the Default Sender Email ID for Alerts

Configure the email ID of the sender for workflows emails and alerts in the registry as follows:

1) Select the **Start** menu and enter *regedit* in the **Search** bar.

   The Registry Editor displays.

2) In the left navigation pane, select the node:

HKEY_LOCAL_MACHINE\SOFTWARE\ORACLE\Primavera Portfolio Management\Portfolios\Install

3) Create a new string called, **Server Email ID**.
4) Enter an email ID different from the default, *PrimaveraPortfolioManagement.Server@noreply.com*.

> **Note**: If an invalid email ID is entered, then the system reverts to the default email ID.

Accessing PPM Pages Externally

You can access Investor module, Scorecard module, Workbook module, Forms module, and Dashboard module pages from external applications, using the following format:

Syntax

```
<protocol>://<PPM server>/<PPM virtual
directory>/Portfolios/View.htm?<parameters>
```

where:

`<protocol>` = **https**
`<PPM server>` = The name of the server PPM is running on.
`<PPM virtual directory>` = the name of the PPM virtual directory (usually **ProSight**)
`<parameters>` = a string of parameters that specifies the page to open. The string is in the form:

```
<parameter name>=<value>&<parameter name>=<value>&<parameter
name>=<value>%
```

Note that the first parameter is not preceded by an ampersand (&).

Example

https://myserver/ProSight/Portfolios/View.htm?window=form&itemID=5&formID=10&formTabID=15

Parameters Rules

Parameters describe the content of the page to open. Parameters vary based on the type of window you want to view. The following rules apply to parameters.

- When a view is missing an expected parameter, it is replaced by either the default or current value in the system. For example, if an item identifier is missing, the default or current item is displayed.
- Parameter names and values are not case sensitive.

General Parameters

The **window** parameter is required, while all other parameters are optional and can be in any order.

Name	Purpose	Expected Value
window	Identifies the module you want to display.	**db** = Dashboard module. You must also specify the item to display. **form** = Forms module **map** = Investor module **sc** = Scorecard module **todo** = To Do module **wb** = Workbook module
itemID	The ID of the item or portfolio you want to display in the selected module.	Number corresponding with the database ID of the item or portfolio.
itemName	The name of the item or portfolio you want to display in the selected module.	Escaped string corresponding with the name of the item or portfolio.
itemCI	The common identifier of the item or portfolio you want to display in the selected module. Use this parameter for OEM purposes.	Number corresponding with the common identifier of the item or portfolio, as set in the values of the category denoted by commonIDCategoryName.
commonIDCategoryName	The category name holding the items or portfolios common identifiers. Use this parameter for OEM purposes.	Escaped string corresponding with the name of the category holding the items and portfolios common identifiers.

Investor Parameters

Name	Purpose	Expected Value
mapID	The ID of the map you want to display in the Investor module.	Number corresponding with the database ID of the map.
mapName	The name of the map you want to display in the Investor module.	Escaped string corresponding with the name of the map.
viewMode	Identifies how you want to view a portfolio of portfolios.	**items** = items view mode **portfolios** = portfolios view mode

verID	The ID of the scenario you want to display in the Investor module, corresponding with the specified portfolio.	Number corresponding with the database ID of the scenario.
verName	The name of the scenario you want to display in the Investor module, corresponding with the specified portfolio.	Escaped string corresponding with the name of the scenario.
colorCatID	The color axis category ID you want to display in the map.	Number corresponding with the database ID of the category.
colorCatName	The color axis category name you want to display in the map.	Escaped string corresponding with the name of the category.
sizeCatID	The size axis category ID you want to display in the map.	Number corresponding with the database ID of the category.
sizeCatName	The size axis category name you want to display in the map.	Escaped string corresponding with the name of the category.
asOfDate	The as of date.	Escaped string in the format m/d/yyyy.
asOfID	The version ID.	Number corresponding with the database ID of the version.
asOfName	The version name.	Escaped string corresponding with the name of the version.

Scorecard Parameters

Name	Purpose	Expected Value
scID	The ID of the scorecard you want to display.	Number corresponding with the database ID of the scorecard.
scName	The name of the scorecard you want to display.	Escaped string corresponding with the name of the scorecard.
asOfDate	The as of date.	Escaped string in the format m/d/yyyy.

asOfID	The version ID.	Number corresponding with the database ID of the version.
asOfName	The version name.	Escaped string corresponding with the name of the version.

Workbook Parameters

Name	Purpose	Expected Value
scID	The ID of the scorecard you want to display.	Number corresponding with the database ID of the scorecard.
scName	The name of the scorecard you want to display.	Escaped string corresponding with the name of the scorecard.
tabName	The name of the workbook you want to display.	**ai** = Action Items tab **cnt** = Contacts tab **dlvr** = Deliverables tab **dpnd** = Dependencies tab **lc** = Life Cycle tab **link** = Links tab **sts** = Status tab
dependenciesType	The type of dependency you want to display in the Dependencies tab	**1** = item depend on **2** = depending on item

Forms Parameters

Name	Purpose	Expected Value
formID	The ID of the form you want to display in the Forms module.	Number corresponding with the database ID of the form.
formName	The name of the form you want to display in the Forms module.	Escaped string corresponding with the name of the form.
tabID	The ID of the tab you want to display in the Forms module, corresponding with the displayed form.	Number corresponding with the database ID of the tab.

tabName	The name of the tab you want to display in the Forms module, corresponding with the displayed form.	Escaped string corresponding with the name of the tab.
asOfDate	The as of date.	Escaped string in the format m/d/yyyy.
asOfID	The version ID.	Number corresponding with the database ID of the version.
asOfName	The version name.	Escaped string corresponding with the name of the version.

Dashboard Parameters

Name	Purpose	Expected Value
dashboardID	The ID of the dashboard you want to display in the Dashboard module.	Number corresponding with the database ID of the dashboard.
dashboardName	The name of the dashboard you want to display in the Dashboard module.	Escaped string corresponding with the name of the dashboard.
tabID	The ID of the tab you want to display in the Dashboard module, corresponding with the displayed dashboard.	Number corresponding with the database ID of the tab.
tabName	The name of the tab you want to display in the Dashboard module, corresponding with the displayed dashboard .	Escaped string corresponding with the name of the tab.
asOfDate	The as of date.	Escaped string in the format m/d/yyyy.
asOfID	The version ID.	Number corresponding with the database ID of the version.
asOfName	The version name.	Escaped string corresponding with the name of the version.

To Do Parameters

Name	Purpose	Expected Value
tabName	The name of the tab you want to display in the To Do module.	**ai** = Action Items tab **dlvr** = Deliverables tab **req** = My Requests tab **upd** = My Updates tab

My Processes Parameters

Name	Purpose	Expected Value
processFolderID	The ID of the My Processes folder you want to display.	Number corresponding with the database ID of the process folder.

Escaping Strings

String escaping is the operation of replacing certain characters in a string with other characters that are valid for the usage of the string. When using name values in parameters, you should escape the values.

Character	ASCII code	Escaped value
Space	32	%20
!	33	%21
"	34	%22
#	35	%23
$	36	%24
%	37	%25
&	38	%26
'	39	%27
(	40	%28
)	41	%29
+	43	%2B
,	44	%2C
:	58	%3A

;	59	%3B
<	60	%3C
=	61	%3D
>	62	%3E
?	63	%3F
[	91	%5B
\	92	%5C
]	93	%5D
^	94	%5E
`	96	%60
{	123	%7B
|	124	%7C
}	125	%7D
~	126	%7E

Any other character with an ASCII code lower than 32 or higher than 126 should be escaped to the % character followed by the hexadecimal valuf of the ASCII code.

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