

IBM Program Management System

IBM Program Management Portal Client User's Guide

**Version 1.0
PgMP Release 18.3**

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Author: IBM Program Management Practice

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About this document

This document describes the client's use of the Program Management Portal.

Who should use this document?

- Client personnel using PgMP
- IBM personnel responsible for the operation of PgMP

Related documents

This document should be used in conjunction with the Introduction to PgMP video ([see references](#)).

Summary of changes

This section records the history of significant changes to this document. Only the most significant changes are described here.

Table 1 Document Versions

Version	Date	Author	Description of change
1.0	16/04/2018 (DD/MM/YYYY)	Krishna Nanjundappa	All the topics that are on the list of enhancements for PgMP R18.3 have been posted. <ul style="list-style-type: none">• PgMP Portal - Add "Take action" button to the record details section• PgMP Portal – Rename the step from Proposal Development to Proposal Approval when IBM eSignature Package is out for approval• IBM eSignature - Visibility over Archived eSignature packages• IBM eSignature – Approval of Implementations – Change Firm RFS Workflows• PgMP Catalog - Open Service Product URL in new Browser Tab• PgMP Catalog - Create hyperlink from "Service Product" for displaying more detailed information of an item• PgMP Catalog - Clarify Catalog item page for users by updating button text and instructional text

Where significant changes are made to this document, the version number will be incremented by 1.1.

Where changes are made for clarity and reading ease only and no change is made to the meaning or intention of this document, the version number will be increased by 0.1.

The information in this plan is current as of the Version date. Information that changes between the review cycles will be updated during the normal review cycle.

Distribution

Notification of new versions of this document is managed as jointly agreed between Client and IBM.

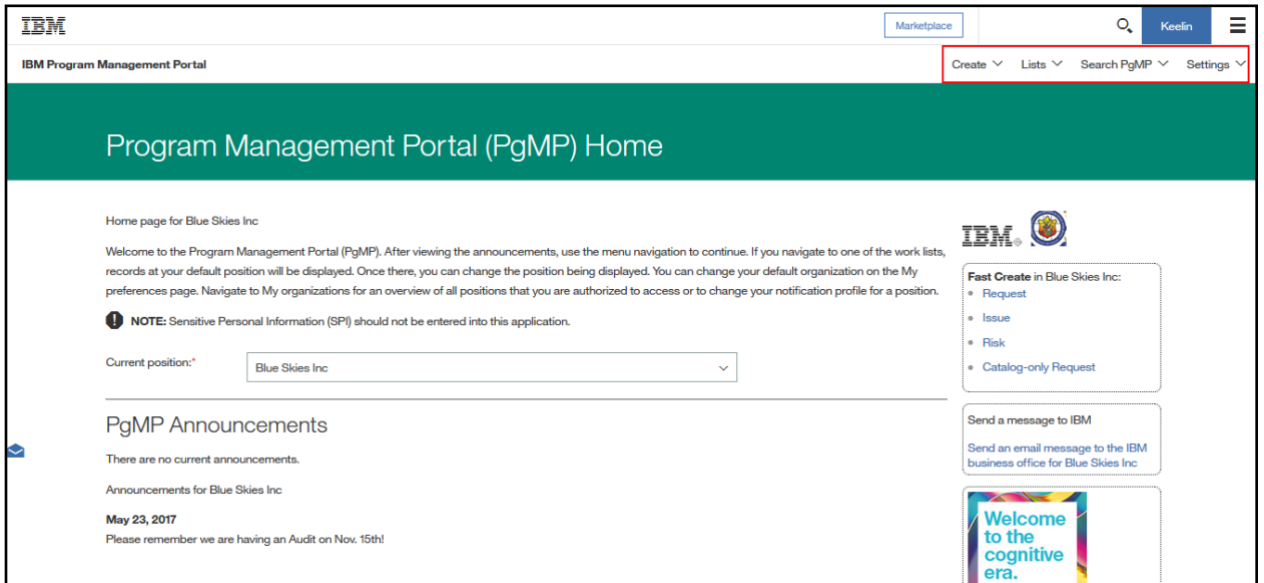
Document control information

At the end of this document is a labeled box indicating the end of text.

Chapter 1. Basic Navigation

1.1. Purpose

The top navigation pane within PgMP is used to provide the user with the menu options that are available within the tool.



Sign in to IBM

Enter your IBMid [Forgot IBMid?](#)

Password [Forgot password?](#)

[Sign in](#)

New? [Create an IBMid.](#) [Help and FAQ](#)

Enterprise Users:

[Sign in with your organizations ID](#)

Note: Sensitive Personal Information (SPI) should not be entered into PgMP.

Note: If you forget your password, click on the “Forgot password” and you will see the screen below,

Having trouble signing in?
Enter your IBMid to reset
your password.

IBMId [Forgot IBMid?](#)

[Continue](#)

Then enter your IBMid and click on continue to reset your password. You will see the screen displayed below:

Please check your inbox at
kr*****@gm***.com

We've sent you a link to securely reset your password. This link will expire in 30 minutes.

Haven't received this email? Check your spam filter for an email from **ibmacct@us.ibm.com**. If you are still unable to find the email, please [contact our help desk](#) to continue.

Resend this email

You will receive an email to your associated email address allowing you to reset your password. As shown in the above screen print, make sure to check your spam folder for the note.

When a user first logs into PgMP, they will be presented with Terms and Conditions:

Terms and conditions

The purpose of the Program Management Portal (PgMP) is to manage IBM Client requests for additional services, project changes, issues, risks, and other items associated with an existing IBM contract. Access is granted to authorized users only.

Before being allowed access to this application, all users should read and must accept the terms below annually.

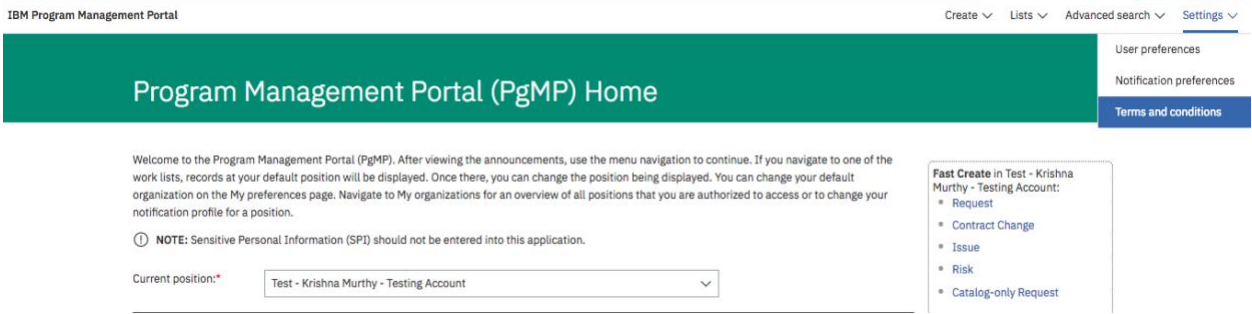
- You will not enter any personal information into this application other than business contact information (e.g., name, business email address, and business phone numbers). Personal information is any information that identifies or is capable of identifying an individual.
- You acknowledge and agree that your business contact information may be stored and processed in connection with the performance of the contracted services on IBM's servers or the servers of the authorized IBM group or third party service providers anywhere in the world. Your business contact information entered into PgMP will be retained for 15 years following the termination of your client organization, after which point your Business Contact Information will be securely deleted. If you are entering business contact information of others, you must read this notice to them and obtain their consent before entering their information.

By clicking **I agree** below, you agree to the processing of business contact information as described above.

I agree

I decline

The user is to read these Terms and Conditions and click I agree, if they agree. If they do not agree, they will not be able to log into the tool. Users must agree to Terms and Conditions on an annual basis. Users can view the terms he or she agreed to as well as the date it was last done by clicking on Terms and Conditions from the Settings drop down menu like shown below.



1.2. Navigation Options

- PgMP Home:** Provides announcements related to planned outages, planned updates, and new features in the tool as well as organization specific announcements. Additionally, it serves as a welcome page that orients users to navigating the tool and provides a fast way to create frequently used records.
- Create:**
- PgMP record:** Creates a new record.
 - Export file:** Provides the ability to request History and Record Logs in .csv format as well as access attachments and .pdf files users have exported out of the tool.
- Lists:**
- Organizations:** Displays all organizations in which you have assigned roles and includes the counts for both the “My Work” and “Active Work” queues. Users can also assign individual organizations any of their notification profiles configured on the My Preferences page.
 - My work:** Displays the records currently assigned to you within your selected organization(s) as well as Approval records and Comments assigned to you, that you have subscribed to, and/or is pending your approval.
 - Active work:** Displays the active requests within your selected organization(s).
 - Completed work:** Displays the completed requests for your selected organization(s).
 - On hold work:** Displays the requests that have been placed “On Hold” for your selected organization(s).
 - Deleted work:** Displays the deleted requests within your selected organization(s).
 - eSignature packages:** Displays the eSignature packages for the selected organization
- Search PgMP:**
- Search for records:** Allows users to search for records across all record types and all work lists in an organization.

	Search for attachments:	Allows users to search for attachments across all record types and all work lists in an organization.
Settings:	User preferences:	Allows you to change your user preferences for: <ul style="list-style-type: none"> • Time zone • Currency Format • Time Format • Language • Default Organization • Select position every time during Create • Number of records per page • Default login page • Default record type for work lists • Default record type for supporting assets • Default contents of the Details tab • Default record type for Dashboard
	Notification Preferences:	Allows users to enable/disable notifications for all positions and record types in PgMP.
	Approval Profiles:	Allows users to view, rename, or delete an approval profile.
	Terms and conditions:	Provides the last accepted version of the PgMP terms and conditions as well as the date it was accepted.
Help:		This link opens the Program Management Portal (PgMP) Client Users Guide.
Dashboard:		Provides up-to-date views on PgMP RFS data with customizable tables and views.

See the [Client Basic Overview module](#) for more details on the elements of the top navigation not covered in detail in the guide.

1.2.1. Basic Navigation

Select your desired record type from the Fast Create section of the home page or select your desired work queue under “Lists” and then click on the title of a record to select it for processing or to submit a new record, select the “Create” option under Create. PgMP will guide you through the steps in the process via the automated workflow. For detailed information on workflows, please see the Workflows section of the User’s Guide.

Fast Create in Test - Core Business

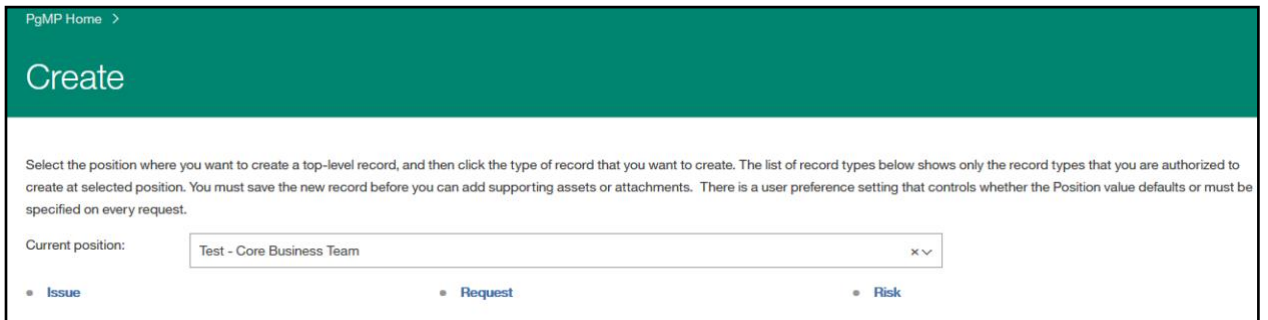
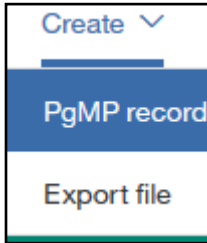
Team:

- Request
- Issue
- Risk

Create ▾ Lists ▾ Search PgMP ▾ Settings ▾

1.3. Create Page

On the Create page, the user first selects the account for which they desire to create a new record. Then, the user simply selects the object type desired, and a new page will open. Depending on the object type selected, the object's workflow will be unique from the original to that object. For detailed information on workflows, please see the Workflows section of this Users Guide.



1.4. Filtering

Filtering is used to quickly and easily locate a record or group of records that have specific values in predefined fields. You can set a single filter or any combination of the available filters to locate your records.

Set filter values (Current filters:0)

Specify one or more filters for fields in the records and click **Apply filter changes**. If you specify a filter for a field that is not present in this record type, the resulting list of records will be empty.

Words in title:

Record ID:

Client Reference #:

Audience:

Type of assignment:

- Records that I am currently assigned (default)
- Records that I am permanently assigned in any role
- Records for which I hold a Primary role in any step which are not permanently assigned to someone else
- Records for which I hold a Primary or Secondary role in any step
- Records that I ever saved
- Records to which I am subscribed

Process

Workflow Step :

Due on or before:

Record information

Record Level:

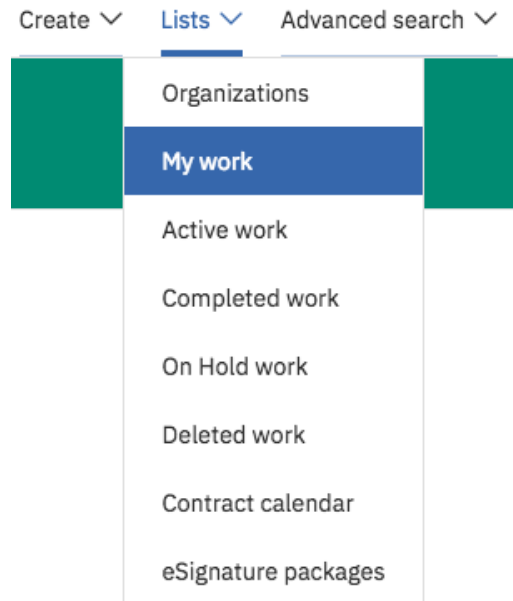
Condition:

Priority:

Chapter 2. Work Lists

2.1. Purpose

The Work Lists within PgMP are used to view, process, print, and export records.



There are five Work Lists within PgMP: My Work, Active Work, Completed work, On hold work, and Deleted work.

2.2. My Work List

PgMP Home >

My work

+ Instructions

Change records displayed

Current position: Test - Core Business Team - General Users 1

+ Set filter values (Current filters:0) 2

Select the record type to be shown in the list below. The current number of records of each type currently assigned to you is shown in parentheses after the record type name. Record types that you can see only by selecting additional "Type of assignment" filters are shown with a count of zero. Click the **Title** link to open the record.

Action (1) 3

Approval (3)

Comment (4)

Contract Change (0)

Contract Deliverable (0)

Issue (0)

Project Change Request (0)

Request (2)

Risk (1)

List of records - Action

4 5
[Download as PDF](#) [Download as CSV](#)

Take Action	Record ID	Client Reference #	Contract	Title	Step	Assigned To
Select 6	CORE-ACT-000025		Test - Core Business Team - General Users	Action copy test KTR Client 7	Closure	Client Test Roper, Keelin

Showing 1 to 1 of 1 entries

Previous 1 Next

Use of the browser Back and Forward buttons may not behave as expected. Please use the navigation links provided to use this site.

- | | |
|--------------------------|---|
| 1. Current Position: | Allows you to select the organization(s). |
| 2. Set filter values: | Allows you to filter the requests viewed. |
| 3. Record type selection | Select the record type to view or filter. |
| 4. Download as PDF: | Allows you to create a printed version of all items in a Work List. |
| 5. Download as CSV: | Allows you to export the list to an Excel spreadsheet. |
| 6. Take Action: | <p><u>Add new attachment</u> – Allows you to add a new attachment without having to open a record.</p> <p><u>Copy</u> – Allows you to copy the basic data from the selected request into a new request (does NOT copy attachments) and opens the new request for editing.</p> <p><u>Move to another position</u> – Allows users to move authorized records to another organization.</p> <p><u>Export as PDF</u> – Allows you to export a record and specify which sections and data types to include in the PDF file.</p> <p><u>Reassign</u> - Assigns the request to another resource. You will be provided with a list of authorized resources for the record in a drop-down box.</p> <p><u>Subscribe / Unsubscribe</u> - Allows you to subscribe to any future changes that occur to this record and receive an email notification when they occur or unsubscribe stop being notified of changes to a record.</p> <p><u>View attachments</u> – Allows you to jump to the Attachment list view.</p> <p><u>View explorer</u> - Allows you to jump to the Explorer tab.</p> <p><u>View notes</u> – Allows you to jump to the Notes tab.</p> <p><u>View supporting assets</u> - Allows you to jump to the Supporting assets tab.</p> <p><u>View history</u> - Allows you to jump to the History tab.</p> <p><u>Place/Remove from Hold</u> – Allows you to place the selected request on hold removing it from an Active status or remove it from Hold and put it back in an Active status. An On Hold request cannot be moved forward or backward in the process until it is removed from On Hold.</p> <p><u>Delete/Undelete</u> – Allows you to delete or undelete the record and all of its associated child records and attachments.</p> <p><u>Withdraw/Unwithdraw</u> – Withdraw the request from the Active work queue or Unwithdraw from the Completed work queue.</p> <p>Note: <i>visible actions are available to end users based on their authority for the record and its current step.</i></p> |
| 7. Process records: | Allows you to select the record for processing by clicking on the record's title in the "Title" column. |

2.3. My Work Filters

The My work list has additional filters that allow users to expand the view to include records where the user may be assigned or have an interest.

Type of assignment:	<input checked="" type="checkbox"/> Records that I am currently assigned (default)
	<input type="checkbox"/> Records that I am permanently assigned in any role
	<input type="checkbox"/> Records for which I hold a Primary role in any step which are not permanently assigned to someone else
	<input type="checkbox"/> Records for which I hold a Primary or Secondary role in any step
	<input type="checkbox"/> Records that I ever saved
	<input type="checkbox"/> Records to which I am subscribed

2.4. Active Work List

IBM Program Management Portal Create ▾ Lists ▾ Search PgMP ▾ Settings ▾

PgMP Home >

Active work

+ Instructions

Change records displayed

Current position: Test - Core Business Team - General Users 1

+ Set filter values (Current filters: 0) 2

Select the record type to be shown in the list below. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name. Click the **Title** link to open the record.

Account Reports (4)	Catalog Request Change (2)	Formal Correspondence (1)	Request (1,04)
Account Specific (3)	Contract Change (3)	Issue (23)	Resource - Hardware (1)
Action (14)	Contract Deliverable (4)	Project (11)	Risk (18)
Approval (20)	Customer Satisfaction (1)	Project Change Request (8)	RU Tracking (1)
Catalog-only Request (2)	Document Control (1)	Project Deliverable (2)	

3

List of records - Account Reports

4 [Download as PDF](#)
5 [Download as CSV](#)

Take Action	Record ID	Client Reference #	Contract	Title	Step	Assigned To
Select ▾ 6	CORE-RPT-000007		Test - Core Business Team - General Users	SLA Monthly Report 7	Active	Roper, Keelin T.
Select ▾	CORE-RPT-000006		Test - Core Business Team - General Users	KTR Monthly Report	Active	Roper, Keelin T.

Showing 1 to 2 of 2 entries Previous 1 Next

1. Current Position: Allows you to select the organization(s).
2. Set filter values: Allows you to filter the requests viewed.
3. Record type selection: Select the record type to view or filter
4. Download as PDF: Allows you to create a printed version of all items in a Work List.
5. Download as CSV: Allows you to export the list to an Excel spreadsheet.
6. Take Action:
 - Add new attachment – Allows you to add a new attachment without having to open a record.
 - Move to another position – Allows users to move authorized records to another organization.
 - Export as PDF – Allows you to export a record and specify which sections and data types to include in the PDF file.
 - Copy – Allows you to copy the basic data from the selected request into a new request (does **NOT** copy attachments) and opens the new request for editing.
 - Reassign - Assigns the request to another resource. You will be provided with a list of authorized resources for the record in a drop-down box.

Subscribe / Unsubscribe - Allows you to subscribe to any future changes that occur to this record and receive an email notification when they occur or unsubscribe stop being notified of changes to a record.

View attachments – Allows you to jump to the Attachment list view.

View explorer - Allows you to jump to the Explorer tab.

View notes – Allows you to jump to the Notes tab.

View supporting assets - Allows you to jump to the Supporting assets tab.

View history - Allows you to jump to the History tab.

Place/Remove from Hold – Allows you to place the selected request on hold removing it from an Active status or remove it from Hold and put it back in an Active status. An On Hold request **cannot** be moved forward or backward in the process until it is removed from On Hold.

Delete/Undelete – Allows you to delete or undelete the record and all of its associated child records and attachments.

Withdraw/Unwithdraw – Withdraw the request from the Active work queue or Unwithdraw from the Completed work queue.

Note: *visible actions are available to end users based on their authority for the record and its current step.*

7. Process records:

Allows you to select the record for processing by clicking on the record's title in the "Title" column.

2.5. Completed Work List

IBM Program Management Portal Create ▾ Lists ▾ Search PgMP ▾ Settings ▾

PgMP Home >

Completed work

+ Instructions

Change records displayed

Current position: Test - Core Business Team - General Users 1

+ Set filter values (Current filters:0) 2

Select the record type to be shown in the list below. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name. Click the **Title** link to open the record.

Action (3) Contract Deliverable (2) Request (3) 3
Approval (1) Project (1)

List of records - Action

4 [Download as PDF](#) 5 [Download as CSV](#)

Take Action	Record ID	Client Reference #	Contract	Title	Completion Reason	Completion Date
Select ▾ 6	CORE-ACT-000024		Test - Core Business Team - General Users	Action 16.4 KTR Revised	Complete	19 Apr 2016
Select ▾	CORE-ACT-000022		Test - Core Business Team - General Users	KTR Testing Client Action 16.3	Complete	17 Mar 2016
Select ▾	CORE-ACT-000020		Test - Core Business Team - General Users	KTR Client Action test 1	Complete	17 Mar 2016

Showing 1 to 3 of 3 entries Previous 1 Next

1. Current Position: Allows you to select the organization(s).
2. Set filter values: Allows you to filter the requests viewed.
3. Record type selection: Select the record type to view or filter
4. Download as PDF: Allows you to create a printed version of all items in a Work List.
5. Download as CSV: Allows you to export the list to an Excel spreadsheet.
6. Take Action:
 - Add new attachment – Allows you to add a new attachment without having to open a record.
 - Move to another position – Allows users to move authorized records to another organization.
 - Export as PDF – Allows you to export a record and specify which sections and data types to include in the PDF file.
 - Copy – Allows you to copy the basic data from the selected request into a new request (does **NOT** copy attachments) and opens the new request for editing.

Reassign - Assigns the request to another resource. You will be provided with a list of authorized resources for the record in a drop-down box.

Subscribe / Unsubscribe - Allows you to subscribe to any future changes that occur to this record and receive an email notification when they occur or unsubscribe stop being notified of changes to a record.

View attachments – Allows you to jump to the Attachment list view.

View explorer - Allows you to jump to the Explorer tab.

View notes – Allows you to jump to the Notes tab.

View supporting assets - Allows you to jump to the Supporting assets tab.

View history - Allows you to jump to the History tab.

Delete/Undelete – Allows you to delete the record and all of its associated child records and attachments or undelete a record and any of its associated child records to an Active status.

Note: *visible actions are available to end users based on their authority for the record and its current step.*

7. Process records:

Allows you to select the record for processing by clicking on the record's title in the "Title" column.

2.6. On Hold Work List

IBM Program Management Portal

PgMP Home >

On hold work

+ Instructions

Change records displayed

Current position: Test - Core Business Team - General Users

+ Set filter values (Current filters:0)

Select the record type to be shown in the list below. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name. Click the **Title** link to open the record.

Action (1) Project (1)
Contract Change (2) Request (1)

List of records - Action

Download as PDF Download as CSV

Take Action	Record ID	Client Reference #	Contract	Title	Step	Days on Hold
Select	CORE-ACT-000016		Test - Core Business Team - General Users	Action child of JWC project	In progress	945

Showing 1 to 1 of 1 entries

Previous 1 Next

1. Current Position: Allows you to select the organization(s).
2. Set filter values: Allows you to filter the request viewed.
3. Record type selection: Select the record type to view or filter
4. Download as PDF: Allows you to create a printed version of all items in a Work List.
5. Download as CSV: Allows you to export the list to an Excel spreadsheet.
6. Take Action:
 - Add new attachment – Allows you to add a new attachment without having to open a record.
 - Move to another position – Allows users to move authorized records to another organization.
 - Export as PDF – Allows you to export a record and specify which sections and data types to include in the PDF file.
 - Copy – Allows you to copy the basic data from the selected request into a new request (does **NOT** copy attachments) and opens the new request for editing.
 - Reassign - Assigns the request to another resource. You will be provided with a list of authorized resources for the record in a drop-down box.

Subscribe / Unsubscribe - Allows you to subscribe to any future changes that occur to this record and receive an email notification when they occur or unsubscribe stop being notified of changes to a record.

View attachments – Allows you to jump to the Attachment list view.

View explorer - Allows you to jump to the Explorer tab.

View notes – Allows you to jump to the Notes tab.

View supporting assets - Allows you to jump to the Supporting assets tab.

View history - Allows you to jump to the History tab.

Place/Remove from Hold – Allows you to place the selected request on hold removing it from an Active status or remove it from Hold. An On Hold request **cannot** be moved forward or backward in the process until it is removed from On Hold.

Delete/Undelete – Allows you to delete the record and all of its associated child records and attachments or undelete a record and any of its associated child records to an Active status.

Withdraw/Unwithdrawn – Withdraw the request from the Active work queue or Unwithdrawn from the Completed work queue.

Note: *visible actions are available to end users based on their authority for the record and its current step.*

7. Process records:

Allows you to select the record for processing by clicking on the record's title in the "Title" column.

2.7. Deleted Work List

IBM Program Management Portal Create ▾ Lists ▾ Search PgMP ▾ Settings ▾

PgMP Home >

Deleted work

+ Instructions

Change records displayed

Current position: Test - Core Business Team - General Users 1

+ Set filter values (Current filters:0)

Select the record type to be shown in the list below. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name. Click the **Title** link to open the record.

Action (3)
Issue (1)
Request (3)
2

Approval (1)
Project Change Request (1)

List of records - Action

3 [Download as PDF](#)
4 [Download as CSV](#)

Take Action	Record ID	Client Reference #	Contract	Title	Step	Days on Hold
Select ▾	5 CORE-ACT-000016		Test - Core Business Team - General Users	Action child of JWC project	6 In progress	945

Showing 1 to 1 of 1 entries Previous 1 Next

1. Current Position: Allows you to select the organization(s).
2. Record type selection: Select the record type to view or filter
3. Download as PDF: Allows you to create a printed version of all items in a Work List.
4. Download as CSV: Allows you to export the list to an Excel spreadsheet.

5. Take Action:

Add new attachment – Allows you to add a new attachment without having to open a record.

Subscribe / Unsubscribe - Allows you to subscribe to any future changes that occur to this record and receive an email notification when they occur or unsubscribe stop being notified of changes to a record.

View attachments – Allows you to jump to the Attachment list view.

View explorer - Allows you to jump to the Explorer tab.

View notes – Allows you to jump to the Notes tab.

View supporting assets - Allows you to jump to the Supporting assets tab.

View history - Allows you to jump to the History tab.

Place/Remove from Hold – Allows you to place the selected request on hold removing it from an Active status or remove it from Hold. An On Hold request **cannot** be moved forward or backward in the process until it is removed from On Hold.

Delete/Undelete – Allows you to delete the record and all of its associated child records and attachments or undelete a record and any of its associated child records to an Active status.

Note: *visible actions are available to end users based on their authority for the record and its current step.*

6. Process records:

Allows you to select the record for processing by clicking on the record's title in the "Title" column.

2.8. Contract Calendar

IBM Program Management Portal Create Lists Advanced search Settings

PgMP Home >

Contract calendar

Select the organization, the period you wish to display, and any additional filters, and then click Go. The calendar list below will show all records selected to show on the calendar which have tracked due dates within the period, plus all Calendar Entry records within the period. Click a record's title to open that record.

Current position:*

Include child organizations: Yes No

Dates to show: through

+ Set filter values (Current filters:1)

<input type="checkbox"/>	Take Action	Date	Record ID	Client reference #	Contract	Title	Record Type	Assigned to
<input type="checkbox"/>	Select	28 Mar 2018	CCG-000003		Test - Krishna Murthy - Testing Account	test1	Contract Change	Nanjundappa, Krishna (krishna.letschat@gmail.com)

Showing 1 to 1 of 1 entries Previous Next

- | | |
|---------------------------------|--|
| 1. Current position: | Allows you to select the organization(s) |
| 2. Include child organizations: | Select Yes/No option to include child organizations |
| 3. Dates to show: | Select the date range |
| 4. Download as PDF: | Allows you to create a printed version of calendar items |
| 5. Download as CSV: | Allows you to export the list to an Excel spreadsheet |
| 6. Take Action: | Select appropriate action on a calendar item |
| 7. Date: | Displays the date created for calendar item |
| 8. Record ID: | Displays the record ID |
| 9. Client reference: | Displays the client reference number |
| 10. Contract: | Displays the contract name |
| 11. Title: | Displays the title for a calendar item |
| 12. Record type: | Displays the record type |
| 13. Assigned to: | Displays the contract calendar assigned to a contact |

2.9. eSignature Packages

IBM Program Management Portal Create ▾ Lists ▾ Advanced search ▾ Settings ▾

PgMP Home >

eSignature packages

Select the organization and other criteria and then click Search. Records containing IBM eSignature packages that are active now or that were approved, declined, expired, or retrieved within the last 60 days are listed. You can further filter by expiration date or by who created the package.

Position:*

Package status:

Package created by:

Expires on/before:

Each PgMP record with an IBM eSignature package that meets the criteria is listed. Under each package, the signers are listed by their signing sequence and alphabetically within the same sequence. Click a record to view that record's details.

<input type="checkbox"/>	Record ID	Client reference	Record title, signer, signing sequence, signing status and date of latest activity
<input type="checkbox"/>	+ REQ-000052		17.6 install njeht test

1. Position: Allows you to select the organization(s).
2. Package status: Select package status
3. Package created by: Select the user who created the package
4. Expires on/before: Select the date the package expires on/before
5. Download as PDF: Allows you to create a printed version of all eSignature package list
6. Download as CSV: Allows you to export the list to an Excel spreadsheet.
7. Record ID: Displays the Record ID of a package
8. Client reference: Displays the Client reference ID
9. Record title, signer, signing sequence, signing status and date of latest activity: Displays all the relevant information of a package

<input type="checkbox"/>	Record ID	Client reference	Record title, signer, signing sequence, signing status and date of latest activity																
<input type="checkbox"/>	-	CORE-REQ-000162	Imported 011018																
			Nair1																
			<table border="1"> <tbody> <tr> <td>Nair, Neeshma (neeshma.nair@in.ibm.com)</td> <td>1</td> <td>Completed</td> <td>2017-08-22</td> </tr> <tr> <td>P, Shalleja (bubby.shaily@gmail.com)</td> <td>2</td> <td>Signed 0 / 2</td> <td></td> </tr> <tr> <td>Nair, Neeshma (neems28@gmail.com)</td> <td>4</td> <td>Not eligible yet</td> <td></td> </tr> <tr> <td>Murthy, Sujana (sujanmurthy89@gmail.com)</td> <td>5</td> <td>Not eligible yet</td> <td></td> </tr> </tbody> </table>	Nair, Neeshma (neeshma.nair@in.ibm.com)	1	Completed	2017-08-22	P, Shalleja (bubby.shaily@gmail.com)	2	Signed 0 / 2		Nair, Neeshma (neems28@gmail.com)	4	Not eligible yet		Murthy, Sujana (sujanmurthy89@gmail.com)	5	Not eligible yet	
Nair, Neeshma (neeshma.nair@in.ibm.com)	1	Completed	2017-08-22																
P, Shalleja (bubby.shaily@gmail.com)	2	Signed 0 / 2																	
Nair, Neeshma (neems28@gmail.com)	4	Not eligible yet																	
Murthy, Sujana (sujanmurthy89@gmail.com)	5	Not eligible yet																	
<input type="checkbox"/>	+ CORE-REQ-000170	Imported 011018	Kri-e sig test - 2																
<input type="checkbox"/>	+ CORE-REQ-000212	Imported 011018	eSignature Retrieve PD 1579915																
<input type="checkbox"/>	+ CORE-REQ-000214	Imported 011018	Story 1538304 - IBM eSignature - Properly handle Hold, Withdraw and Delete requests when a package is out for signing																

Showing 1 to 4 of 4 entries Previous Next

Chapter 3. Search for records

3.1. Purpose

The search for records function within PgMP is used to search for records across all record types and all work lists in an organization.

3.2. Searching for records

Records can be searched using several criteria such as: Title fragment, Record type, Assigned To and Created by. Once all desired criteria is entered in click the Search button and scroll down to view the results.

IBM Program Management Portal

Create ▾ Lists ▾ Search PgMP ▾ Settings ▾

PgMP Home >

Search for records

Search for attachments

Search for records

Enter one or more search criteria and then click Search. Records matching your search criteria will be displayed in the list below.

Position:* Test - Core Business Team - General Users ▾

Title fragment (exact):

Record ID:

Client Reference #:

Record type: Select Record Type ▾

Assigned To: Select Assigned to ▾

State:

- Active
- Active - On hold
- Completed
- Deleted
- Rejected
- Withdrawn

Created by: Select Created by ▾

Subscription status:* All records ▾

Created date (from):

Created date (to):

Search

Records found in a search can be shown in a Printable version; the attachment list can be exported. Individual or all attachments in the search list can be Subscribed or Unsubscribed. Additionally, records can be exported as a PDF. For more information on options available under Search for records review the [Client Basic Overview module](#) or contact your IBM Account Focal Point with additional questions.

<input type="checkbox"/>	Take Action	Record ID	Client Reference #	Contract	Title	Record type	State
<input checked="" type="checkbox"/>	Select	CORE-RPT-000006		Test - Core Business Team - General Users	KTR Monthly Report	Account Reports	Active
<input type="checkbox"/>	Select	CORE-RPT-000007		Test - Core Business Team - General Users	SLA Monthly Report	Account Reports	Active
<input type="checkbox"/>	Select	CORE-ISU-000024		Test - Core Business Team - General Users	Report May be Delayed	Issue	Active

Showing 1 to 3 of 3 entries

Previous 1 Next

Subscribe Unsubscribe Export as PDF

Download as PDF Download as CSV

Take Action:

Add new attachment – Allows you to add a new attachment without having to open a record.

Move to another position – Allows users to move authorized records to another organization.

Export as PDF – Allows you to export a record and specify which sections and data types to include in the PDF file.

Copy – Allows you to copy the basic data from the selected request into a new request (does **NOT** copy attachments) and opens the new request for editing.

Reassign - Assigns the request to another resource. You will be provided with a list of authorized resources for the record in a drop-down box.

Subscribe / Unsubscribe - Allows you to subscribe to any future changes that occur to this record and receive an email notification when they occur or unsubscribe stop being notified of changes to a record.

View attachments – Allows you to jump to the Attachment list view.

View explorer - Allows you to jump to the Explorer tab.

View notes – Allows you to jump to the Notes tab.

View supporting assets - Allows you to jump to the Supporting assets tab.

View history - Allows you to jump to the History tab.

Place/Remove from Hold – Allows you to place the selected request on hold removing it from an Active status or remove it from Hold and put it back in an Active status. An On Hold request **cannot** be moved forward or backward in the process until it is removed from On Hold.

Delete/Undelete – Allows you to delete the record and all of its associated child records and attachments or undelete a record and any of its associated child records to an Active status.

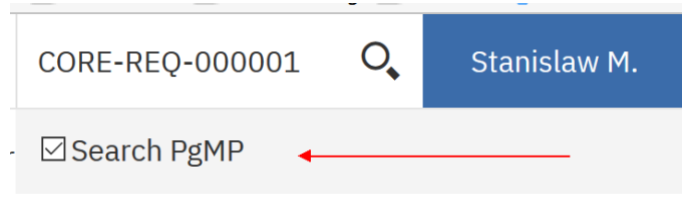
Withdraw/Unwithdraw – Withdraw the request from the Active work queue or Unwithdraw from the Completed work queue.

3.3 Masthead Search enabled for searching for PgMP Records

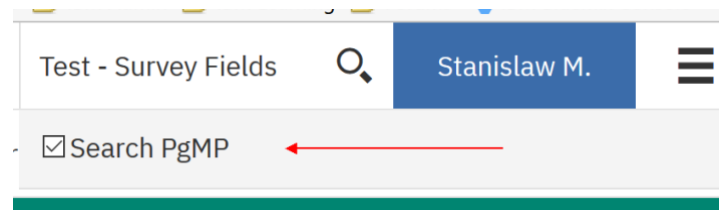
Starting with PgMP Release 17.7 when using the PgMP application and the masthead search, the user will see a checkbox option labelled "Search PgMP".

When "Search PgMP" is checked, the masthead search searches PgMP record data with the search criteria and results displayed on PgMP's normal "Search for records" page:
If the search string adheres to the format specified below then the entered criteria is used as search input for the **Record ID**:

- Optional: 1-4 character prefix configured for the Org, followed by a dash.
- Always required: 3-character "record type abbreviation" which is always uppercase and English alphabetic, followed by a dash.
- Always required: 6-digit numeric sequence number.

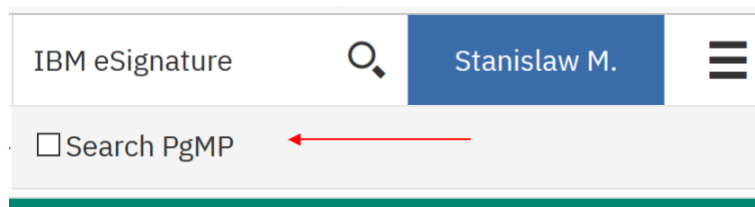


- If the search string does not adhere to the format specified on previous slide, then the entered criteria is used as search input for the **Title**



NOTE: The search for record will be performed on the user's default organization set in the PgMP Preferences therefore a default organization has to be selected to avail of functionality to use the masthead search box to search for PgMP records. If the user does not have a default organization, the search cannot be executed - in that case, the "Search for records" page is displayed with a flash message "You must have a default organization selected in your user preferences settings in order to use the masthead search."

- When "Search PgMP" is unchecked, the masthead search searches **ibm.com**.



Chapter 4. Search for attachments

4.1. Purpose

The attachments function within PgMP is used to search for attachments across all record types and all work lists in an organization.

4.2. Searching for Attachments

Attachments can be searched using several criteria such as: Title fragment, Attachment type, Audience and Created by clicking in Search for Attachments from the left-hand navigation. Once all desired criteria is entered in click the Search button and scroll down to view the results.

The screenshot shows the IBM Program Management Portal interface. At the top, there is a navigation bar with the IBM logo, a search icon, and the name 'Keelin'. Below this, the page title 'IBM Program Management Portal' is visible. A green header bar contains the text 'PgMP Home >' and 'Search for attachments'. On the right side of the header, there are navigation options: 'Create', 'Lists', 'Search PgMP', and 'Settings'. A dropdown menu is open under 'Search PgMP', showing 'Search for records' and 'Search for attachments'. The main content area has a heading 'Search for attachments' and a sub-heading 'Enter one or more search criteria and then click Search. Attachments matching your search criteria will be displayed in the list below.' Below this, there are several search criteria fields: 'Position:*' with a dropdown menu showing 'Test - Core Business Team - General Users', 'Title fragment(exact):', 'File name/URL fragment(exact):', and '+ Advanced search criteria'. A blue 'Search' button is located at the bottom left of the search area.

Advanced search criteria

Attachment type: File URL

Audience: Client and IBM Client only

Status: Draft Final Not applicable

Obsolete: Yes No

Content contains:

Tag (specify only one):

Client reference #:

Created by:

Created date (from):

Created date (to):

Updated date (from):

Updated date (to) :

The following attachments meet your criteria. Click the title to open the version list. Click the file name/URL to access the content. Use the Select column and the buttons below to perform other actions. Selecting all records using the checkbox in the title row selects all records on the current page.

<input type="checkbox"/>	Attachment title	File name/URL	Contract	Record ID	Client reference #	Record title	Other information
<input type="checkbox"/>	Client Attachment	Saturday the 6/1.doc	Test - Core Business Team - General Users			SLA Monthly Report	Draft, Client and IBM
<input type="checkbox"/>	Test Attachment	ESIG_TEST.txt	Test - Core Business Team - General Users			MD - e-Signature Test - Client Disapproves	Final, Client and IBM

Showing 1 to 2 of 2 entries

Attachments found in a search can be shown in a Printable version by clicking on the Download as PDF icon; the attachment list can be exported to a .csv file by choosing the Download as CSV icon. Individual or all attachments in the search list can be Subscribed or Unsubscribed by putting a check in the box next to them. Additionally, attachments can be exported as a PDF, a new version can be added or it can be marked obsolete by clicking the appropriate button. For more information on options available under Search for records review the [Client Basic Overview module](#) or contact your IBM Account Focal Point with additional questions on Attachments.

Chapter 5. Attachments

5.1. Purpose

The attachments function within PgMP is used to store supporting documentation that is related to a Record or Organization.

5.2. Accessing and Creating Attachments

Attachments can be accessed in several ways. Through a record's Attachments tab or Fast Create box, through a work queue's list view using the Select option, and through the My Organizations view.

5.2.1. Accessing / Creating Attachments through a record's tab

Once you click on the Attachments tab of a record you will see the Attachment list view.

List attachments view

The List attachments view is chosen by clicking the Attachments tab. It will show the attachments visible to you. Placing a check box in the box to the left of a record will make the Add new version button accessible. Putting a check in one or multiple boxes allows users to export attachments or mark them obsolete.

Details Catalog (0) Supporting Assets (0) **Attachments (2)** Notes (1) Explorer History

Hide obsolete
attachments:

Attachment list

Click the download icon to download the latest version of a file attachment, or click the link icon to open the URL that is in the latest version of a URL attachment. Click the Add new attachment link to create a new attachment. You can also drag one or more files and drop them onto this tab. A wizard will then open to collect information about each file.

Click the title of an attachment to view the list of versions for that attachment. To add a new version to that attachment, then use the Add new version link or drag a single file and drop it onto the version list.

There are 2 attachments not shown because they are marked obsolete and are excluded by a filter.

You cannot add a new version to an attachment if you are not authorized to view the current top version of the attachment.

+ Set filter values (Current filters:0)

Add new attachment | Download as CSV

<input type="checkbox"/>	Attachment title	File name/URL	Status	Audience	Obsolete	File/URL updated by	Date (GMT)
<input type="checkbox"/>	BTT QA Calculator	BBT QA Calculator.xls	Draft	Client and IBM	No	Client Test Roper, Keelin	03 Nov 2015 13:17:44
<input type="checkbox"/>	Hardware maintenance Questions	Maintenance questions.doc	Draft	Client and IBM	No	Client Test Roper, Keelin	03 Nov 2015 13:17:08

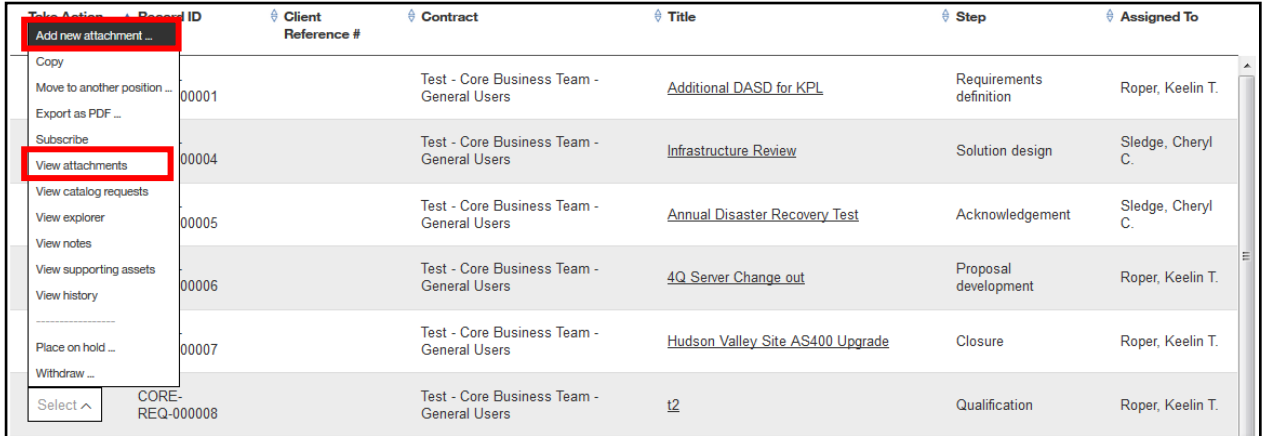
Showing 1 to 2 of 2 entries

Export Add new version Mark obsolete

Previous 1 Next

5.3. Accessing / Creating Attachments through a work queue's list view

Click Select next to a record and choose View attachments to be taken to the Attachment list view or Add new attachment to add a new attachment.



The screenshot shows a table with columns: Take Action, Record ID, Client Reference #, Contract, Title, Step, and Assigned To. A context menu is open over the first record, with 'Add new attachment ...' and 'View attachments' highlighted in red. The table contains several records with various titles and steps.

Take Action	Record ID	Client Reference #	Contract	Title	Step	Assigned To
Copy						
Move to another position ...	00001		Test - Core Business Team - General Users	Additional DASD for KPL	Requirements definition	Roper, Keelin T.
Export as PDF ...						
Subscribe	00004		Test - Core Business Team - General Users	Infrastructure Review	Solution design	Sledge, Cheryl C.
View attachments	00005		Test - Core Business Team - General Users	Annual Disaster Recovery Test	Acknowledgement	Sledge, Cheryl C.
View catalog requests						
View explorer	00006		Test - Core Business Team - General Users	4Q Server Change out	Proposal development	Roper, Keelin T.
View notes						
View supporting assets	00007		Test - Core Business Team - General Users	Hudson Valley Site AS400 Upgrade	Closure	Roper, Keelin T.
View history						
Place on hold ...	00008		Test - Core Business Team - General Users	CORE-REQ-000008	Qualification	Roper, Keelin T.
Withdraw ...						
Select ^						

5.4. Accessing / Creating Attachments through the My Organizations view

Users who want to view or add an attachment at the Organization level verses the record level click on My Organizations from the left-hand navigation. Additionally, users can add a new version of an existing attachment or export one or multiple attachments. Exported attachments appear in the Exports view. More details are included on this later on in the guide.

IBM Program Management Portal Create ▾ Lists ▾ Search PgMP ▾ Settings ▾

PgMP Home > Organizations >

Organization information and attachments

Organizations
My work
Active work
Completed work
On Hold work
Deleted work

Organization: Blue Skies Inc
Time zone of the contract: (GMT-06:00) Central Time (US & Canada)
Contract number: abcd1234
Contract start date: 2014-01-01
Contract end date: 2019-12-31
IBM business office contact information: Dillon, Beverly J. (beverlydillon@us.ibm.com)

Organization attachment list

This is a list of attachments related only to the contract rather than to specific business records. Click the download icon to download the latest version of a file attachment, or click the link icon to open the URL that is in the latest version of a URL attachment. Click the Add new attachment link to create a new attachment. You can also drag one or more files and drop them onto this page. A wizard will then open to collect information about each file.

Click the title of an attachment to view the list of versions for that attachment. To add a new version to that attachment, then use the Add new version link or drag a single file and drop it onto the version list.

Hide obsolete attachments:

There are 1 attachments not shown because they are marked obsolete and are excluded by a filter.

You cannot add a new version to an attachment if you are not authorized to view the current top version of the attachment.

+ Set filter values (Current filters:0)

[Add new attachment](#) | [Download as PDF](#) | [Download as CSV](#)

<input type="checkbox"/>	Attachment title	File name/URL	Other information	Date (GMT)
<input type="checkbox"/>	1Q17 Client Quartlery Security Audit	1Q17 Client Quartlery Security Audit.doc	Draft , Client and IBM	02 Jun 2017 19:08:28
<input type="checkbox"/>	Previous DR Test	2015 Annual DR Test Plan.doc	Draft , Client and IBM	29 Nov 2016 15:14:59

Showing 1 to 2 of 2 entries Previous Next

[Export](#) [Add new version](#) [Mark obsolete](#)

5.5. Add one new attachment

5.5.1. Add one Attachment through an open record's Fast Create box

Users can create an Attachment directly from an open record using the Fast Create box.

Fast Create a supporting asset: [Action](#) [Approval](#) [Attachment](#) [Comment](#) [Project Change Request](#)

Once the Attachment link is clicked the Add new Attachment window pops up:

✕

Add new attachment

If you are attaching a large file or typically have slow upload speeds, we recommend that you compress your file and attach the compressed file. Windows users can compress a file by right-clicking it and choosing "Send To" and then "Compressed (zipped) Folder". This will create a file of type 'zip'.

Required fields are indicated with an asterisk (*). The verification of required fields is only performed when the status becomes Final. First, select whether you want to attach a file or a URL.

- If you select **File**, you must click the **Browse** button to select a file.
- If you select **URL**, type or paste the internet address.

Then enter requested information and click **Submit**.

Do not attach any file that contains any Personal Information or Sensitive Personal Information that identifies or is capable of identifying an individual.

Attachment type:* File URL

File name:*

Title:*

Audience indicator:* Client and IBM Client only

Status:* Draft Final Not applicable

Description:

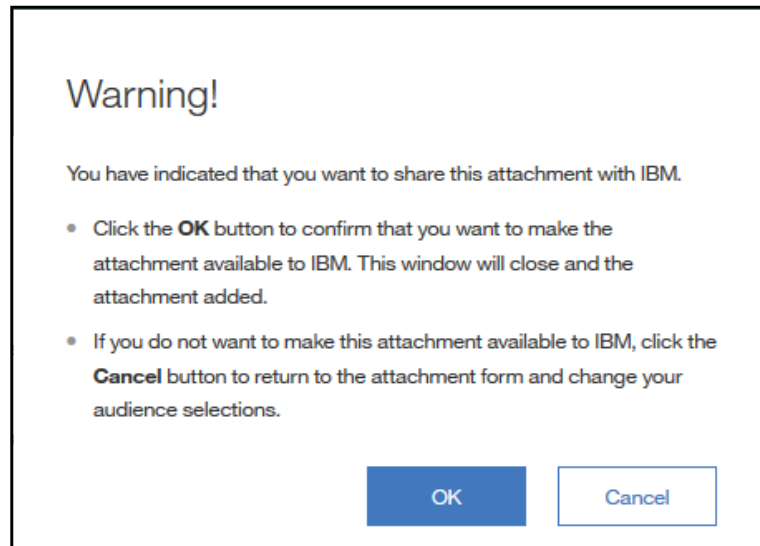
Tags (use comma between tags):

Mark obsolete?: Yes No

Contains price information?: Yes No

Attachment type:	Allows you to choose the source of the attachment.
File name or URL:	If the Attachment type is File, use the Browse button to locate the file (shown above). If Attachment type is URL, enter the URL (not shown).
Title:	Allows you to identify attachment with a title.
Audience indicator:	Allows you to determine who will be able to see this attachment. <ul style="list-style-type: none"> • Client and IBM – visible to both client and IBM employees authorized in the tool. • Client only – visible to only the client employees authorized in the tool.
Status:	Allows you to indicate if the attachment is Draft or Final.
Note:	Once an attachment is marked Final, it can no longer be updated.
Description:	Allows you to provide more detail on the attachment (optional).
Tags:	Allows you to group attachments. These tags can be entered in Search attachments criteria.
Mark obsolete	Allows you to indicate if the attachment should be hidden from view.

When you have completed the required fields, click Submit. If you have chosen to share the attachment with IBM, you will see an additional pop-up and asked to confirm or return to the previous screen.



Note once an attachment is marked Final, it can no longer be updated. Privileges must be set for users as to whether he or she can view cost price data fields and attachments. If “No” is chosen for a user he or she will not be able to view an attachment containing cost price information. Tags can be added to the search criteria in the Search for attachments. Marking an attachment obsolete allows users to remove them from view without replacing them. Review the Advanced Overview module or contact your IBM Account Focal Point with additional questions on Attachments.

5.5.2. Add one Attachment through an open record's Attachment tab



Click on the Attachments tab, click Add new attachment, and complete the required fields. As previously mentioned Attachments can also be added from the list view, the work list view and the My Organizations view.

Title: **Testing e-signature**
Contract: Test - Core Business Team - General Users
Current step: Proposal development
Current status: Proposal development in progress.
Assigned to: Packova, Katarina

Fast Create a supporting asset: [Action](#) [Approval](#) [Attachment](#) [Comment](#) [Project Change Request](#)

Details Catalog (0) Supporting Assets (0) **Attachments (0)** Notes (0) Explorer History



Attachment list

Click the download icon  to download the latest version of a file attachment, or click the link icon  to open the URL that is in the latest version of a URL attachment. Click the Add new attachment link to create a new attachment. You can also drag one or more files and drop them onto this tab. A wizard will then open to collect information about each file.

Click the title of an attachment to view the list of versions for that attachment. To add a new version to that attachment, then use the Add new version link or drag a single file and drop it onto the version list.

You cannot add a new version to an attachment if you are not authorized to view the current top version of the attachment.

+ Set filter values (Current filters:0)

 **Add new attachment**  Export list

<input type="checkbox"/>	Attachment title	File name/URL	Status	Audience	Obsolete	File/URL updated by	Date (GMT)
<input type="checkbox"/>	Statement of Requirements	--- NOT DEFINED ---	Draft	Client and IBM	No		02 Jun 2017 08:25:27

Showing 1 to 1 of 1 entries

Export

Previous Next

5.6. Add multiple attachments at once

From the Attachments tab, Attachment list view, and/or at the Organization information and attachments level, users can select multiple attachments and drag and drop them into the attachment list view.



Add new attachment (1 of 3)

If you are attaching a large file or typically have slow upload speeds, we recommend that you compress your file and attach the compressed file. Windows users can compress a file by right-clicking it and choosing "Send To" and then "Compressed (zipped) Folder". This will create a file of type 'zip'.

Use the Continue button to enter information about each file that you dropped here. Required fields are indicated with an asterisk (*). The verification of required fields is only performed when the status becomes Final. Click Submit after reviewing the last file.

Do not attach any file that contains any Personal Information or Sensitive Personal Information that identifies or is capable of identifying an individual.

File name / URL: Issue Status Update 12-9-16.doc

Title:*

Audience indicator:* Client and IBM IBM only IBM Restricted only

Category:*

Sub category:*

Evidence:* Yes No

Status:* Draft Final Not applicable

Description:

Tags (use comma between tags):

Mark obsolete?: Yes No

Contains cost information?: Yes No

Contains price information?: Yes No

Continue

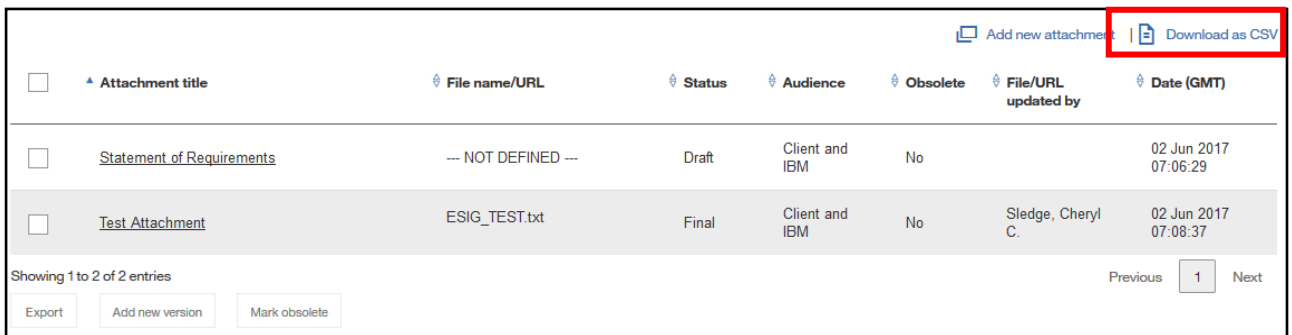
Cancel

Once attachments are dragged onto the list view of a record or organization a pop up appears such as the one shown above.

The file name and title is copied from the attachment files and information entered in for the first attachment is copied into the next attachment. Users click the Continue button until the last attachment is reached. At that time, the Submit button appears and all attachments are added. If the Cancel button is clicked at any time none of the attachments are added. A Back button appears for all attachments but the first allowing a user to make further updates before Submitting.

5.6.1. Export list

Export a list of attachments and their basic metadata to an excel spreadsheet. To export the files themselves click the Download as CSV link.

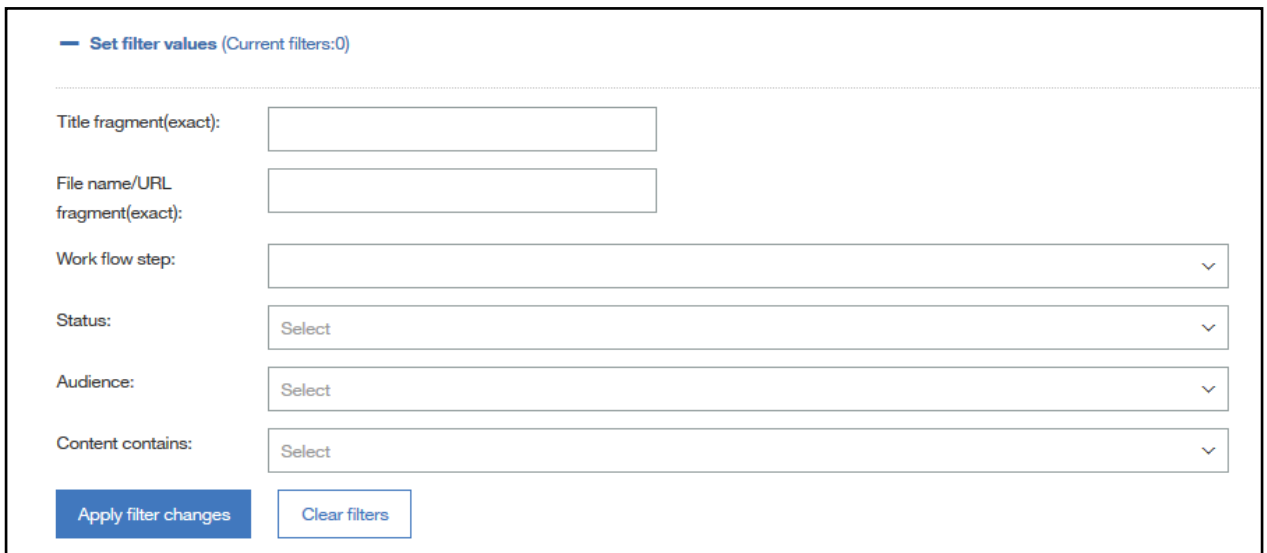


The screenshot shows a table of attachments with columns for Attachment title, File name/URL, Status, Audience, Obsolete, File/URL updated by, and Date (GMT). Two entries are visible: 'Statement of Requirements' and 'Test Attachment'. At the top right, there are links for 'Add new attachment' and 'Download as CSV', with the latter highlighted in a red box. Below the table, there are buttons for 'Export', 'Add new version', and 'Mark obsolete', and a pagination control showing 'Showing 1 to 2 of 2 entries' with 'Previous', '1', and 'Next' options.

<input type="checkbox"/>	Attachment title	File name/URL	Status	Audience	Obsolete	File/URL updated by	Date (GMT)
<input type="checkbox"/>	Statement of Requirements	--- NOT DEFINED ---	Draft	Client and IBM	No		02 Jun 2017 07:06:29
<input type="checkbox"/>	Test Attachment	ESIG_TEST.txt	Final	Client and IBM	No	Sledge, Cheryl C.	02 Jun 2017 07:08:37

5.6.2. Set filter values

Attachment Filtering is used to quickly and easily locate an attachment or group of attachments that have specific values in predefined fields. You can set a single filter or any combination of the available filters to locate your attachments.



The screenshot shows the 'Set filter values' interface with the following fields and controls:

- Title fragment(exact):
- File name/URL fragment(exact):
- Work flow step:
- Status:
- Audience:
- Content contains:
- Buttons: 'Apply filter changes' (blue) and 'Clear filters' (white)

5.7. Individual attachment view

To view details on an individual attachment, click on the title field.

<input type="checkbox"/>	Attachment title	File name/URL	Status	Audience	Obsolete	File/URL updated by	Date (GMT)
<input type="checkbox"/>	Statement of Requirements	--- NOT DEFINED ---	Draft	Client and IBM	No		02 Jun 2017 07:06:29
<input type="checkbox"/>	Test Attachment	↓ ESIG_TEST.txt	Final	Client and IBM	No	Sledge, Cheryl C.	02 Jun 2017 07:08:37

Showing 1 to 2 of 2 entries

Export Add new version Mark obsolete

Previous 1 Next

5.7.1. Modify an existing Version

This function enables you to change the basic metadata of an existing attachment. There are two ways to modify an existing Draft document. You can Click on the attachment number and continue as described earlier.

File name/URL	Version	Status	Audience	Created by	File/URL updated by	Date (GMT)
↓ Project_tracking_information.csv	<input type="checkbox"/> 1	Draft	Client and IBM	Client Test Roper, Keelin	Client Test Roper, Keelin	05 Jun 2017 20:07:15

- You can modify the existing metadata in an attachment by selecting the fields and updating them.
- You can also delete the current attachment by clicking on the “Delete current file version” verbiage.

File name / URL: Prod_err.txt [Delete current file version]

You can replace the current attachment with a new file by clicking on the “Delete current file version” verbiage and when this screen is returned click either “**File**” or “**URL**” in the attachment type field as described above in Adding an attachment.


NOTE: You can only delete the *latest version* of the attachment. Prior versions cannot be deleted. Also, attachments must have unique titles.

5.7.2. Add a New Version

There are two ways to add a new version of an existing Draft attachment.



5.7.2.1. Add New Version link

The first involves clicking on the Add new version button and continuing on as described earlier.

▲ File name/URL	📄 Version	📄 Status	📄 Audience	📄 Created by	📄 File/URL updated by	📄 Date (GMT)
↓ Project tracking information.csv	 1	Draft	Client and IBM	Client Test Roper, Keelin	Client Test Roper, Keelin	05 Jun 2017 20:07:15

5.7.2.2. Add a New Version through Drag and Drop



Another way to add a new version of a Draft document is to drag and drop it just as described under Add Multiple attachments. First click on the Attachment title of the attachment you would like to update in either at the record or the Organization level. Next select the new version of the attachment and drag it onto the Attachment versions page as shown below. As with adding multiple attachments a pop up will appear on your screen. It is titled, “Add new version”. The information previously entered stays the same but can be changed if desired. Click Submit to complete the attachment update.


▲ File name/URL	📄 Version	📄 Status	📄 Audience	📄 Created by	📄 File/URL updated by	📄 Date (GMT)
↓ Project tracking information.csv	 1	Draft	Client and IBM	Client Test Roper, Keelin	Client Test Roper, Keelin	05 Jun 2017 20:07:15
↓ Revised Project Tasks.csv	 2	Draft	Client and IBM	Client Test Roper, Keelin	Client Test Roper, Keelin	05 Jun 2017 20:17:05

5.7.3. Returning to the List attachments view

You may return to the overall list of attachments by clicking either the Attachments tab or the “View at attachments list” link.

[<< View attachments list](#)

Click the download icon  to download the file attached to a version, or click the link icon  to open the URL of a URL attachment. Click the version number to view the details of a version. You can only revise the details or content of the latest version. To create a new version of this attachment click on the Add new version link or drag a single file and drop it on this list.

▲ File name/URL	📄 Version	📄 Status	📄 Audience	📄 Created by	📄 File/URL updated by	📄 Date (GMT)
↓ Project tracking information.csv	 1	Draft	Client and IBM	Client Test Roper, Keelin	Client Test Roper, Keelin	05 Jun 2017 20:07:15

5.7.4. Marking an attachment as obsolete

This function enables you to remove one attachment from view. Click on the Version number and click Yes for the Mark obsolete radio button at the bottom of the pop up window and click Submit to remove it from view in the tool.

File name/URL	Version	Status	Audience	Created by	File/URL updated by	Date (GMT)
Project tracking information.csv	1	Draft	Client and IBM	Client Test Roper, Keelin	Client Test Roper, Keelin	05 Jun 2017 20:07:15

Mark obsolete?: Yes No

To mark more than one attachment as obsolete users select the check box for an attachment row or multiple rows. Next, he or she clicks on the "Mark Obsolete" button. Then he or she confirms the attachments to be made obsolete, by clicking on the OK button on the pop up validation screen.

<input checked="" type="checkbox"/>	Attachment title	File name/URL	Contract	Record ID	Client reference #	Record title	Other information
<input checked="" type="checkbox"/>	FINAL Attachment Test	ePgMS.ed.pic.bmp	Test - Core Business Team - General Users			Harlan Upgrade	Final, Client and IBM
<input checked="" type="checkbox"/>	Test Approval Attachment	PgMP client Revalidation HTML.txt	Test - Core Business Team - General Users		983127 1015899 1012390 -980689		Final, Client and IBM
<input checked="" type="checkbox"/>	Test Attachment	ESIG_TEST.txt	Test - Core Business Team - General Users			MD - e-Signature Test - Client Disapproves	Final, Client and IBM

Showing 1 to 3 of 3 entries

Export Add new version **Mark obsolete** Previous 1 Next

The default in PgMP is to "Hide obsolete attachments". If you would like to see attachments marked obsolete uncheck this box.

Details	Catalog (0)	Supporting Assets (1)	Attachments (1)
Hide obsolete attachments: <input checked="" type="checkbox"/>			

The Obsolete column in the List Attachments view will indicate any attachments that have been removed from view. Users can click on the File name/URL to view an obsolete attachment or click on a Title to modify it to no longer be marked as obsolete.

<input type="checkbox"/> Attachment title	<input type="checkbox"/> File name/URL	<input type="checkbox"/> Status	<input type="checkbox"/> Audience	<input type="checkbox"/> Obsolete	<input type="checkbox"/> File/URL updated by	<input type="checkbox"/> Date (GMT)
<input type="checkbox"/> For Questions	https://www.gogle.com	Draft	Client and IBM	No	Client Test Roper, Keelin	05 Jun 2017 20:51:58
<input type="checkbox"/> List of items to be addressed	To do list.xlsx	Draft	Client and IBM	No	Client Test Roper, Keelin	05 Jun 2017 20:52:53
<input type="checkbox"/> Project Tracking	Revised Project Tasks.csv	Draft	Client and IBM	Yes	Client Test Roper, Keelin	05 Jun 2017 20:17:05
<input type="checkbox"/> Statement of Requirements	--- NOT DEFINED ---	Draft	Client and IBM	No		02 Jun 2017 07:06:29
<input type="checkbox"/> Test Attachment	ESIG_TEST.txt	Final	Client and IBM	Yes	Sledge, Cheryl C.	02 Jun 2017 07:08:37

Chapter 6. Notes

6.1. Purpose

The Notes function within PgMP is used to be associate notes with a record within PgMP. Notes cannot be added to Attachments or Comments and they cannot be exported.

6.2. Adding a Note

To add a Note, click the “Add a Note” button in the Notes tab of a record.



The screenshot displays a web interface with a horizontal tabbed menu at the top. The tabs are labeled: Details, Catalog (0), Supporting Assets (0), Attachments (0), Notes (0), Explorer, and History. The 'Notes (0)' tab is highlighted with a red border. Below the tabs, the main content area is titled 'Client and IBM Notes:' and contains a large, empty rectangular text input field. In the bottom-left corner of this area, there is a blue button with the text 'Add a note', which is also highlighted with a red border.

6.3. Adding to an Existing Note

To add to an existing Note, click the “Add a New Note” button. As with creating a new Note, type your note in the Text field and click the Submit button.

✕

Add a client and IBM note

Enter the text of your note and click Submit. Click Cancel to exit without adding a note. The note text is limited to 2000 single-byte characters, and fewer if you use characters that take multiple bytes. Excessive text will be truncated.

Text:*

We should work together to create a more robust plan.

Submit

Cancel

Client and IBM Notes:

Added 05 Jun 2017 17:06:48
by Client Test Roper, Keelin:
We should work together to create a more robust plan.

Add a note

Chapter 7. Explorer

7.1. Purpose

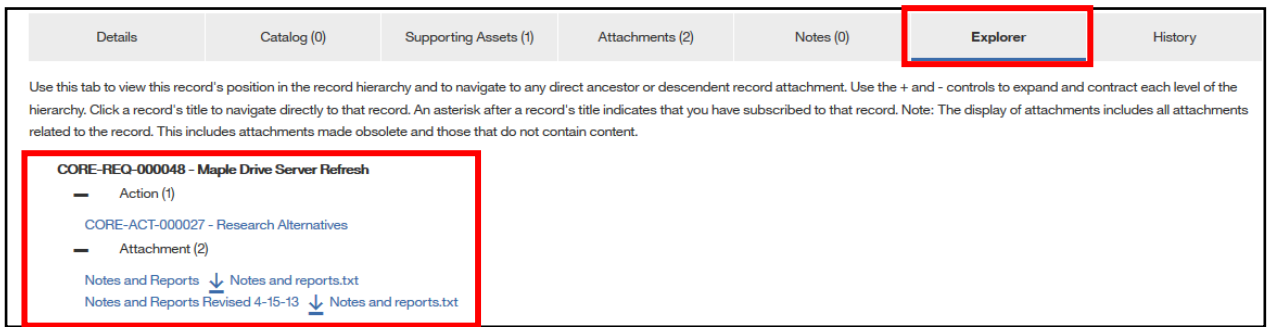
The Explorer view within PgMP provides an easy way to see child records for a record or its parent if it is a child record itself. This view even displays hotlinks to allow users to access associated parent or child records without having to navigate to the tab view.

7.2. Accessing the Explorer view

The Explorer Tab can be accessed in two ways. Through a record's Explorer tab or access it through a work queues list view.

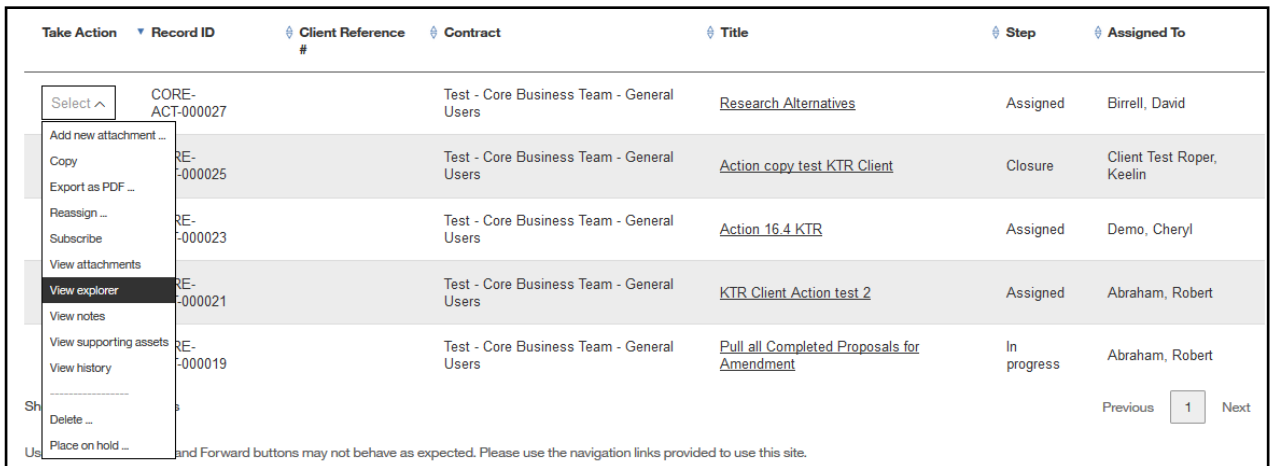
7.2.1. Accessing the Explorer view through a record's Explorer tab

Users click the Explorer Tab of a record's detail list view. Clicking a title allows a user to jump directly to that record. Attachments can be opened directly from this view as well.



7.2.2. Accessing the Explorer view through a work list view

Users click Select next to the record they are interested in and choose View explorer. He or she will be taken directly to that record's Explorer tab.



Chapter 8. Supporting Assets

“Child objects” can be attached to (or “hung off of”) a “parent” object. Users have 7 child objects available to them. Users view all objects that are children of the current object, regardless of the type of either the parent or child object, from the Supporting Assets tab.

The following “child objects” are available to Clients in PgMP:

- Action
- Approvals
- Comment
- Contract Change
- Issue
- Project Change Request
- Risk
- Catalog Request Change

8.1. Accessing a record's Supporting Assets

To see a summary of all of the currently defined instances of one of the supporting object types, the user has two options to access this data: Click on the Supporting Assets tab of a record or access it through a work queue's list view using the Select option.

8.1.1. Accessing Supporting Assets through a record's Supporting Assets tab

The screenshot shows a web interface with a top navigation bar containing tabs: Details, Catalog (0), Supporting Assets (4) (highlighted with a red box), Attachments (0), Notes (2), Explorer, and History. Below the tabs, there is a section for filter settings: '+ Set filter values (Current filters:0)'. Two instructions follow: 'Select the asset type to be shown in the list below. Create new records of that type by clicking **Add new record**. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name.' and 'Select the record type to be shown in the list below. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name. Click the **Title** link to open the record.' Below this, a grid of asset types is displayed: Action (2) (highlighted with a red box), Approval (1), Catalog Request Change (0), Comment (1), Contract Change (0), Issue (0), Project (0), Project Change Request (0), and Risk (0). A section titled 'List of records - Action' follows, with a note: 'Click on **Add new record** link to create a new record.' At the bottom right of this section is an 'Add new record' button. Below the list section is a table with columns: Take Action, Record ID, Client Reference #, Contract, Title, Step, and Assigned To. The first row of data shows: a dropdown menu with 'Select' selected, Record ID 'CORE-ACT-000028', Contract 'Test - Core Business Team - General Users', Title 'Create a plan', Step 'Assigned', and Assigned To 'Abraham, Robert'.

When viewing the Details of an object, users can click on the “Supporting assets” tab. As shown below, all child object types allowed for the object being viewed are shown at the top of the tab. A count of the current number of each type is shown in parentheses after each type’s name. Even child records that are allowed for an object but not yet created are shown.

Note: The Supporting Assets tab lists the child records created for the parent record. However, though these records are listed, they may not be available for creation by clients. Depending on the parent record and supporting asset selected, the client may or may not be allowed to add a new record. Contract Deliverables cannot be created by Clients but can be viewed.

8.1.2. Accessing Supporting Assets through a work list view

Take Action	Record ID	Client Reference #	Contract	Title	Step	Assigned To
Select ^	CORE- ACT-000029		Test - Core Business Team - General Users	Create a panel to investigate options	Assigned	Knecht, John
Add new attachment ...	RE- F-000028		Test - Core Business Team - General Users	Create a plan	Assigned	Abraham, Robert
Copy	RE- F-000027		Test - Core Business Team - General Users	Research Alternatives	Assigned	Birrell, David
Export as PDF ...	RE- F-000025		Test - Core Business Team - General Users	Action copy test KTR Client	Closure	Client Test Roper, Keelin
Reassign ...	RE- F-000023		Test - Core Business Team - General Users	Action 16.4 KTR	Assigned	Demo, Cheryl
Subscribe	RE- F-000021		Test - Core Business Team - General Users	KTR Client Action test 2	Assigned	Abraham, Robert
View attachments						
View explorer						
View notes						
View supporting assets						
View history						
Delete ...						
Place on hold ...						

Once view Supporting assets is clicked the Supporting Assets tab is opened showing the information discussed above.

8.2. View a Summary of an Object's Supporting Assets

To see a summary of all the currently defined instances of one of the supporting object types, the user does the following:

1. Clicks on the Supporting Assets tab.
2. Examines the resulting display which shows the following:
 - A summary of all the Supporting Assets types that this user is authorized to see along with a count of the number of each type that is connected to the current record.
3. The list of the records of the type of Supporting Asset that was last selected by the user
4. If the currently displayed type is not the type the user is interested in seeing, the user clicks the hotspot (name and count) for the desired type, and the list for that type is displayed in place of the prior list.
5. The list of supporting objects can be filtered (see image below). Each object type can have its own filters. Most object types will have some common filters, provided they have the corresponding data attributes. These common filters are the following:
 - Audience
 - Condition
 - Assigned to user
 - Due date (range)
 - Not complete

— Set filter values (Current filters:0)

Words in title:

Record ID:

Client Reference #:

Workflow Status:: ▾

Audience: ▾

Assigned To: ▾

Process

Workflow Step : ▾

Due on or before: 

Record information

Condition: ▾

Priority: ▾

Apply filter changes

Clear filters

8.3. View Details of a Supporting Asset

The user can open Supporting Assets in two ways. Through the Supporting Assets tab of a record or through a work queues list view.

To see a summary listing of the Supporting Assets for a record, the user does the following:

1. Go to the Supporting Assets tab
2. View the list of a supporting asset by clicking on the supporting asset-type as described above.
3. Scroll/filter the list to find the requested supporting asset (optional)
4. Click on the title of the supporting asset record.
5. View the Details page for the chosen supporting asset record.

Some Supporting Asset types may support additional actions from the list, such as initiating a download of an Attachment or possibly launching an application/URL for an Action. A Select button is present on some object types for reassignment, on hold, or withdrawal.

The screenshot shows a web interface for 'Supporting Assets'. At the top, there are tabs: 'Details', 'Catalog (0)', 'Supporting Assets (1)', 'Attachments (2)', 'Notes (0)', 'Explorer', and 'History'. The 'Supporting Assets (1)' tab is selected and highlighted with a red box. Below the tabs, there is a section for filtering and instructions. A grid of asset types is displayed, with 'Action (1)' highlighted by a red box. Other asset types include 'Approval (0)', 'Catalog Request Change (0)', 'Comment (0)', 'Contract Change (0)', 'Issue (0)', 'Project (0)', 'Project Change Request (0)', and 'Risk (0)'. Below this grid, there is a section titled 'List of records - Action'. It includes an 'Add new record' link and a table with columns: 'Take Action', 'Record ID', 'Client Reference #', 'Contract', 'Title', 'Step', and 'Assigned To'. The table contains one record with the following data:

Take Action	Record ID	Client Reference #	Contract	Title	Step	Assigned To
Select	CORE-ACT-000027		Test - Core Business Team - General Users	Research Alternatives	Assigned	Birrell, David

8.4. Creating a Supporting Asset “child” object (e.g. Issue)

8.4.1. Creating Supporting Assets through an open record’s Fast Create section

Client users who can view the Details page of an existing object record can manually create a new supporting asset (depending on the type of child record). In this example, a new Issue object will be directly connected to the existing object as follows:

1. Click Action under the Fast Create of a supporting asset section.
2. A new Action record opens.
3. Fill in the Title and Description.
4. Select the Audience. It is always Public when created by clients
5. Specify the Due Date.
6. Provide or accept defaults for the fields available on the form
7. Add Attachment and/or Comment child objects to the Issue using the steps listed above. As with any record in PgMP, the Action must be saved at least once before any child objects can be created.
8. Save the new Action by selecting “Initiate” in the “Select a task and submit” section and choose the Assigned To role for the Action and click Submit at the bottom of the details page or Cancel it if it should not be saved.

Request for Service CORE-REQ-000035

Open Progress Indicator

Title: Maple Street Upgrade
Contract: Test - Core Business Team - General Users
Current step: Initiation approval by client approver
Current status: Submitted by client requestor. Awaiting action by client approver.
Assigned to: Client Test Roper, Keelin

Fast Create a supporting asset: Action Approval Attachment Comment Project Change Request

Details Catalog (0) Supporting Assets (4) Attachments (0) Notes (2) Explorer History

The fields marked with an asterisk (*) are required. Optional fields can be left blank. Enter the details in the fields as they become available. When all information for the present step is complete, select the appropriate processing step at the bottom of the page and click **Submit**.

Fields to show: All Editable Required only *

8.4.2. Creating Supporting Assets through a record’s Supporting Assets tab

Client users who can view the Details page of an existing object record can manually create a new supporting asset (depending on the type of child record). In this example, a new Action object will be directly connected to the existing object as follows:

1. Click the Supporting Assets tab of the current object to view all its supporting assets, and proceed to display the list of Issues
2. Click “Add new record” above the list of existing Actions (if any). Only users currently capable of making changes to the existing object can create an Issue off it.
NOTE: if the desired asset is not selected prior to clicking the “Add new record”, the application will attempt to create whichever asset type is selected.

3. Fill in the Title and Description.
4. Select the Audience. It is always Public when created by clients
5. Specify the Due Date.
6. Provide or accept defaults for the fields available on the form
7. Add Attachment and/or Comment child objects to the Issue using the steps listed above. As with any record in PgMP, the Action must be saved at least once before any child objects can be created.
8. Save the new Action by selecting "Initiate" in the "Select a task and submit" section and choose the Assigned To role for the Action and click Submit at the bottom of the details page or Cancel if it should not be saved. The new Action is not initially On Hold.

Details Catalog (0) **Supporting Assets (1)** Attachments (2) Notes (0) Explorer History

+ Set filter values (Current filters:0)

Select the asset type to be shown in the list below. Create new records of that type by clicking **Add new record**. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name.

Select the record type to be shown in the list below. The current number of records of each type, without any filters applied, is shown in parentheses after the record type name. Click the **Title** link to open the record.

Action (1) Comment (0) Project (0)
 Approval (0) Contract Change (0) Project Change Request (0)
 Catalog Request Change (0) Issue (0) Risk (0)

List of records - Action

Click on **Add new record** link to create a new record.

Add new record

Take Action	Record ID	Client Reference #	Contract	Title	Step	Assigned To
Select	CORE-ACT-000027		Test - Core Business Team - General Users	Research Alternatives	Assigned	Birrell, David

Note: The Supporting Assets tab lists the child records created for the parent record. However, though these records are listed, they are not necessarily available to the client for creation. Depending on the parent record and supporting asset selected, the client may or may not be allowed to add a new record.

Also, Contract Change, PCRs, Project and Project Deliverable child records will have some fields auto populated from parent records.

"Fast Create" shortcuts will also appear for each Supporting Asset created aside from Comments that cannot have child records.

Fast Create a supporting asset: [Action](#) [Approval](#) [Attachment](#) [Comment](#) [Project Change Request](#)

8.5. Creating a Comment

Users viewing the Details page of an existing object that allows Comment child objects can create a new Comment. It will be directly connected as a child Supporting Asset of that existing object as follows:

1. Click the Supporting Assets tab of the current object to view all its supporting assets, and proceed to display the list of Comments.
2. Click "Add new comment" above the list of existing comments (if any). Anyone who can view the to-be parent object can create a comment (or add a response in an existing "open" comment).
3. Fill in the subject of the Comment.
4. Fill in the text of the Comment.
5. Specify notification options:
 - Provide a list of one or more PgMP users who should be notified that the Comment was created and who should be automatically notified every time there is a response to the Comment.
 - Provide a list of one or more PgMP users who should be notified only that the Comment was created. Users in this list will not be notified of subsequent changes unless they are also in the automatic notification list described above or are specified by a subsequent responder.
6. Comments created by clients are always only Public.
7. Indicate if the comment is "Open" for responses to be added, or "Closed" which prevents responses. Even when a Comment is "Closed", the creator can make some further changes to the Comment.

Note on Comments:

- Only the creator of a Comment can edit a comment.
- Users edit a Comment by navigating to the Comment's parent object, selecting the comment, and proceeding with changes. Note that the text of the comment cannot be edited and its Audience value and automatic notification list cannot be changed.
- Once a Comment or a response is saved, it cannot be changed. If that were allowed, subsequent responses might no longer make sense. If Comment creators decide that the initial comment text is no longer applicable, they can add a final response, close the Comment, and then perhaps create a new Comment.



8.6 Issue Owner field has been made mandatory for Issue records

Currently we have the "Issue Owner" field as optional for issue records. This field will be made mandatory in 17.7 release for the Issue workflows starting at "Qualify Issue" step based on the below criteria.

Acceptance Criteria:

1. The "Issue Owner" field will be made R/W **mandatory** to the button pusher at the Qualify Issue step and all further steps in issue workflow.
2. The "Issue Owner" field is made R/W **optional** to the button pusher in the first step (Create Issue)
3. The "Issue Owner" field will be **R/O** to all users in the final (Complete)
4. The "Issue Owner" field will be **R/O** to **non**-button pusher for all steps

— Basic information *

Project ID:	<input type="text"/>
Description:*	<input type="text" value="desc"/>
Due date:*	<input type="text" value=""/> 
Revised due date:	<input type="text" value=""/> 
Remarks:	<input type="text"/>
Originating organization:	<input type="text"/>
Requestor:	<input type="text" value="Nanjundappa, Krishna (krishna.letschat@gm)"/>
Issue Owner:*	<input type="text"/>
Resolution:	<input type="text"/>

Chapter 9. Workflows

9.1. Purpose

The workflow function within PgMP is used to push a record through the defined process by passing the records from step to step. When one step of the process is completed, PgMP moves the record to the next step and into the work queue of the person with the assigned role for that step.

9.2. Workflows

PgMP introduced several new client-initiated workflows in addition to the original RFS workflows.

The following workflows can be created by client-users:

- RFS - Predefined Service Request
- RFS - Indicative / Budget & Planning
- RFS - Firm
- Action
- Contract Change
- Catalog-Only Request
- Issue
- Project Change Request (PCR)
- Risk

9.3. Roles within the Defined Workflows

For more detailed information on the defined workflows in PgMP: refer to the [PgMP Roles matrix](#) which includes a grid of all object types and their associated creator role(s).

9.4. Configuration Options for Request for Service, Catalog-only and PCR Objects

- These record types can be configured for the following roles:
 - Client requestor
 - Client approver
 - Client focal point
 - Client budget approver
- Specific routes can be configured through the Client-controlled steps in the following workflow phases:
 - Submission
 - Requirements
 - Solution
 - Proposal approval
 - Implementation

Set paths can be set up to route records from one role to the next versus giving options of who can receive the record next if desired. Contact your IBM Account Focal Point to discuss your needs and set up your requested configurations.

9.5. Workflow tables for the Request for Service Object

The following tables show the logic for each of the three-defined client-initiated workflows. The table contains the following fields:

- Process visual - The graphic from the process visual at the top of the RFS detail tab view.
- Process step – The name of the step within the defined workflow
- Role – The role that is responsible for the execution of the step
- Submit Verbs – The actions that can be taken at this step within the workflow. The most logical path/verb will be displayed first in the list.
- The default path is shown. It can be configured to flow differently on your account as previously mentioned.

9.5.1. Client – Initiated / Proposal Pricing Terms: Firm

The process steps at the Initiation stage will be determined by the discussions that you have had with the IBM account team to set up the tool. Shown are three steps; your process steps in PgMP may include just two or one.

Table 2 Client Initiated Proposal Flow - Firm

Process Visual	Process step	Role	Submit verbs
Initiation	Initiation/Rework	Client Requestor	Send to client approver** Send to focal point for approval Send directly to IBM Save changes without change to workflow step Approve and send to focal point**
	Initiation approval	Client Approver	Return to creator for rework Return to creator as rejected Save changes without change to workflow step Submit to IBM
	Submission	Client Focal Point**	Return to creator for rework Return to creator as rejected Save changes without change to workflow step
Acknowledge and Qualify	Acknowledgement	IBM RFS Manager	Acknowledge receipt
Requirements Definition	Requirements approval	Client Focal Point Client Requestor Client Approver	Approve requirements Send to another client role Reject requirements Save changes without change to workflow step
Solution Design	Solution design approval	Client Focal Point Client Requestor Client Approver	Approve solution design Send to another client role Reject solution design Save changes without change to workflow step
Proposal Development	Proposal approval	Client Focal Point**	Approve proposal* Send to another client role Reject and request rework of the proposal Reject the proposal and close this request Save changes without change to workflow step
Closure	Evaluation	Client Focal Point	Send evaluation Decline evaluation Save changes without change to workflow step

*There is an optional loop for the IBM PE to countersign a proposal after the Client has approved.

**Any or all 4 Client roles can perform this task if configured to do so.

9.5.2. Client – Initiated / Proposal Pricing Terms: Indicative - Budget & Planning

The process steps at the Initiation stage will be determined by the discussions that you have had with the IBM account team to set up the tool. Shown are three steps; your process steps in PgMP may include just two or one.

Table 3 Client Initiated Proposal Flow – B&P

Process Visual	Process step	Role	Submit verbs
Initiation	Initiation/Rework	Client Requestor	Send to client approver** Send to focal point for approval Send directly to IBM Save changes without change to workflow step
	Initiation approval	Client Approver**	Approve and send to focal point Return to creator for rework Return to creator as rejected Save changes without change to workflow step
	Submission	Client Focal Point	Submit to IBM Return to creator for rework Return to creator as rejected Save changes without change to workflow step
Acknowledge and Qualify	Acknowledgement	IBM RFS Manager	Acknowledge receipt
Requirements Definition	Requirements approval	Client Focal Point Client Requestor Client Approver	Approve requirements Reject requirements Save changes without change to workflow step
Solution Design	Solution design approval	Client Focal Point Client Requestor Client Approver	Approve solution design Reject solution design Save changes without change to workflow step
Proposal Development	Proposal confirmation	Client Focal Point Client Requestor Client Approver Client Budget Approver	Confirm receipt of Indicative proposal Confirm receipt of Budget and Planning proposal Reject and request rework of the proposal Reject the proposal and close this request Save changes without change to workflow step
Closure	Evaluation	Client Focal Point	Send evaluation Decline evaluation Save changes without change to workflow step

**Any or all 4 Client roles can perform this task if configured to do so.

9.5.3. Client – Initiated / Proposal Pricing Terms: Predefined Solution Request

The process steps at the Initiation stage will be determined by the discussions that you have had with the IBM account team to set up the tool. Shown are three steps; your process steps in PgMP may include just two or one.

Table 4 Client Initiated Prop - Predefined Sol.

Process Visual	Process step	Role	Submit verbs
Initiation	Initiation/Rework	Client Requestor	Send to client approver** Send to focal point for approval Send directly to IBM Save changes without change to workflow step
	Initiation approval	Client Approver**	Approve and send to focal point Return to creator for rework Return to creator as rejected Save changes without change to workflow step
	Submission	Client Focal Point	Submit to IBM Return to creator for rework Return to creator as rejected Save changes without change to workflow step
Acknowledge and Qualify	Acknowledgement	IBM RFS Manager	Acknowledge receipt
Proposal Development	Proposal approval	Client Focal Point Client Requestor Client Approver Client Budget Approver	Confirm agreement with the predefined services and prices Reject and request rework of the proposal Reject the proposal and close this request Save changes without change to workflow step
Implementation	Implementation approval	Client Focal Point Client Requestor Client Approver	Approve implementation Reject implementation Save changes without change to workflow step
Closure	Evaluation	Client Focal Point	Send evaluation Decline evaluation Save changes without change to workflow step

**Any or all 4 Client roles can perform this task if configured to do so.

9.6. Add New Survey Fields to the Predefined Solution Workflows

- Starting from PgMP R17.7, two new fields will be introduced to predefined solution workflows. The fields will contain information about proposal and implementation survey recipient. The fields are "Read" only. The information displayed is based on the user's authorization to view personal information.

Pricing completed date:	11 Aug 2017	Implementation % complete:	<input type="text"/>
Proposal survey recipient:	Dabkowski, Stanislaw (michal@dabkowscy.me)	Implementation survey recipient:	Dabkowski, Stanislaw (michal@dabkowscy.me)

9.7. Catalog-only Request



Catalog-only Request

- **Catalog-only Requests provide an easier way to submit requests that consist solely of priced Catalog items**
- **Features of Catalog-only record type**
 - Combines Qualification and Price Calculation Steps
 - Opens to the Catalog tab up until Implementation
 - Requires input only on the Catalog tab up until implementation for most requests
 - Mandatory fields are captured in the Catalog Request tab, while others are defaulted or delayed until Implementation
 - Opens to the Details tab when request moves to Implementation step
 - Automatically fills in Estimated Total Contract Price if the currency of the Catalog requests match
 - The Submit button and list of tasks are available at the bottom of the Catalog Request sub-tab
 - Path to change Catalog-only record type into a Firm-RFS

10

- **What is a Catalog-only Request?**
 - A Catalog-only Request is used when IBM or the Client wants to create a request in PgMP that only contains catalog items. This request type was introduced in PgMP R6.0.
 -
- **What are the attributes of a Catalog-only Request?**
 - A Catalog-only Request cannot be child of another record in PgMP.
 - A Catalog-only Request does not have any child records associated with it.
 - IBM RFS Managers and Client Requestors can create a Catalog-only Request.
 - Catalog-only Requests can be made Public or Client Only.
 - IBM RFS Managers and Client Requestors can put Catalog-only Requests On Hold.
 - IBM RFS Managers and Client Requestors can put Catalog-only Requests can Withdraw a Catalog-only Request.
- **What is the workflow of a Catalog-only Request?**
 - A Catalog-only Request has the same workflow as an RFS except that the Manage request step has been removed and the Qualification and Price calculation steps are combined into one.

9.8. General Objects Workflow

The General Record types that can be shared with the client in PgMP are:

- Customer Satisfaction
- Formal Correspondence
- Governance
- These records share the same 3-step process in PgMP: Create, Active and Complete.
- General Records have a fast-path flow from Create directly to Complete for times when its creator completes the record in one session (anyone with the IBM Business Office role in the tool).
- Although these records can be shared with the client, only an IBM User of PgMP can work on it in the Active step.
- Only any member of the IBM Business Office can complete the process for a General Record.

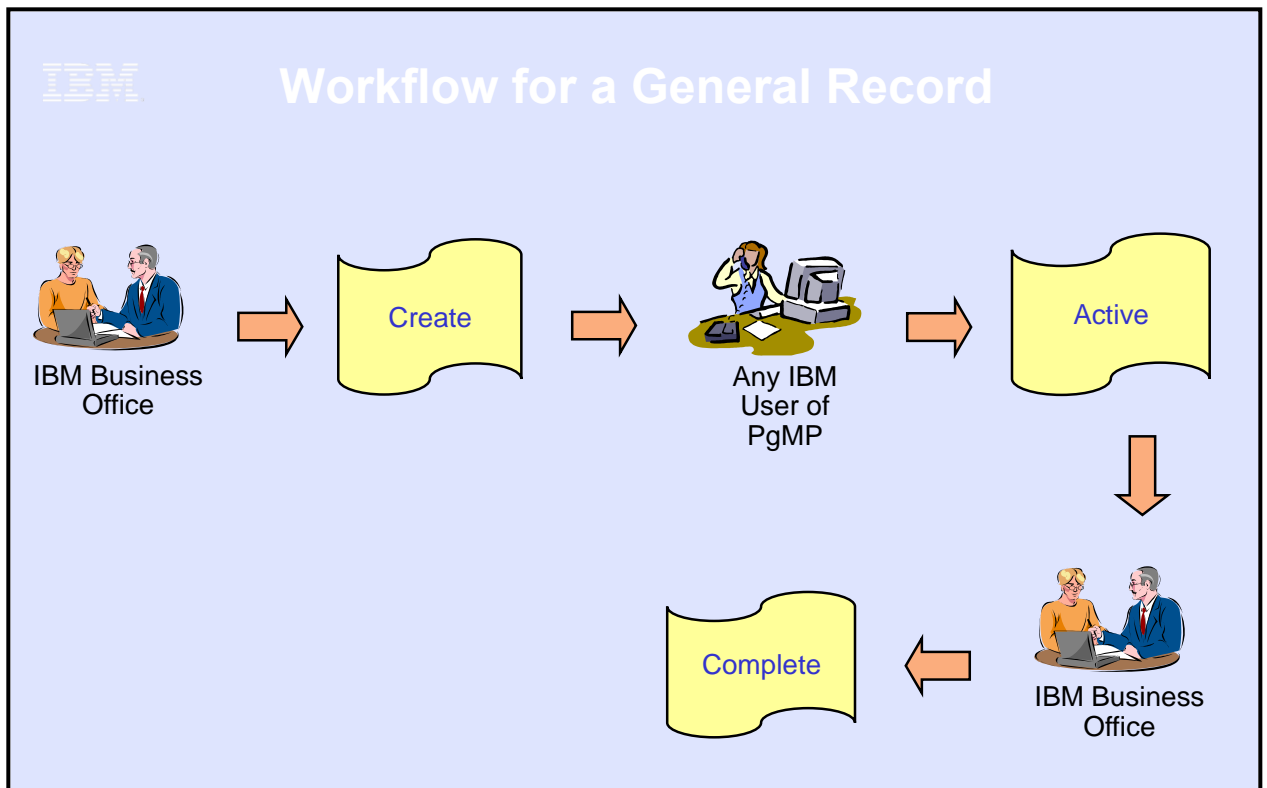


Image Description: The IBM Business Office role creates the record, Any IBM User of PgMP can work on the record in the active state and finally the IBM Business Office role completes the process.

9.9. Contract Change Object Workflow

- **What is a Contract Change?**
 - A Contract Change is a change to the contract Term, Conditions or Schedules
- **What are the attributes of a Contract Change?**
 - A Contract Change can be a stand-alone record or a child of a Request or Baseline record.
 - A Contract Change can be created by an IBM Contract Change Manager or a Client Contract Change Manager
 - A Contract Change can be made Public, IBM-only or IBM-Restricted Only.
 - A Contract Change can have the following child records associated with it:
 - Actions
 - Approvals
 - Attachments
 - Baselines
 - Comments
 - Contract Deliverable
 - Issues
 - Notes
 - Risks

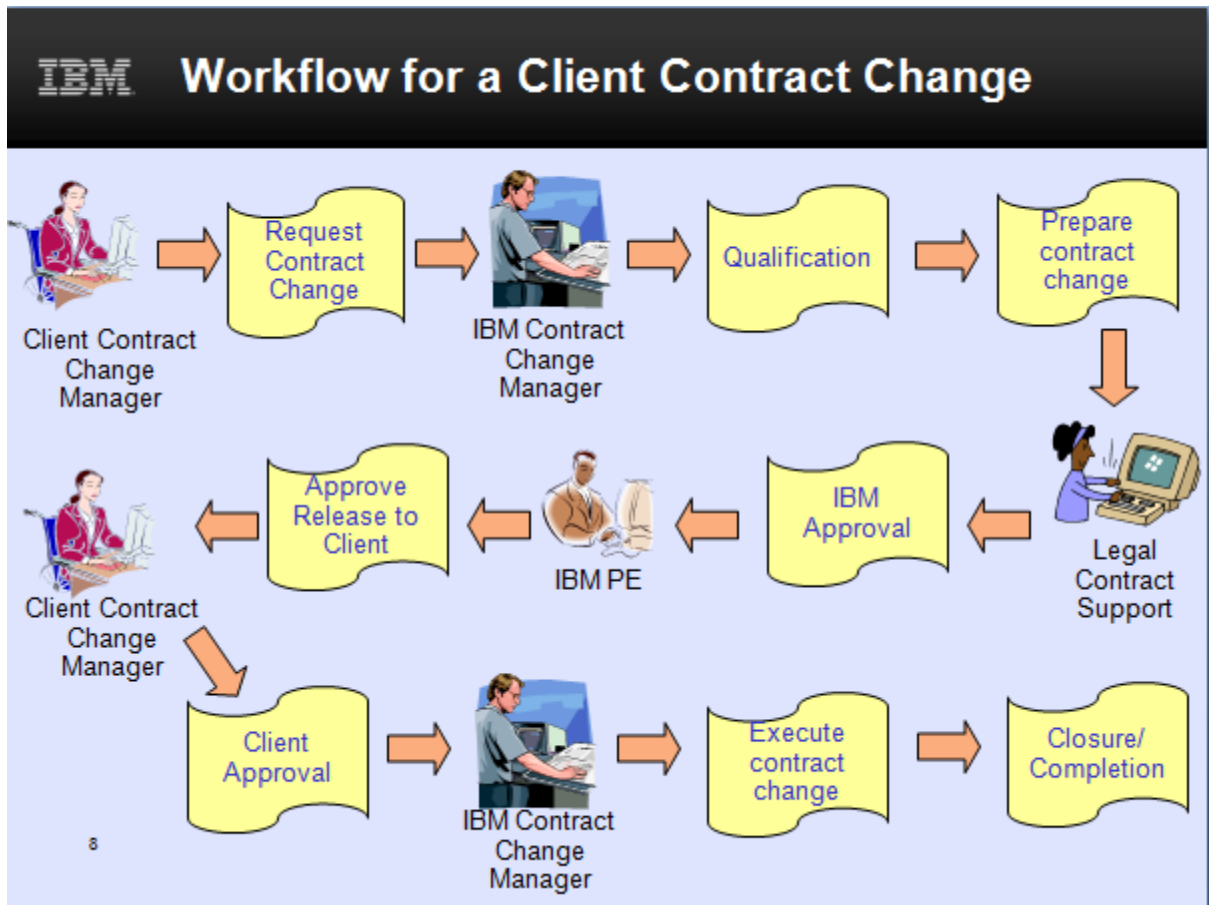


Image Description: The Client Contract Change Manager enters the request for the contract change into the tool. Then the IBM Contract Change Manager qualifies it and prepares the change. Then Legal Contract Support provides IBM's approval and sends it on to the IBM PE or approves its release to the Client, the Client Contract Change Manager provides the Client's approval and finally the IBM Contract Change Manager executes the changes and closes the record out which completes the process.

9.10. Contract Deliverable Object Workflow

- **What is a Contract Deliverable?**
 - A deliverable contained in an Outsourcing Contract
- **A Contract Deliverable record in PgMP can be:**
 - An IBM Deliverable that requires client notification (DND)
 - An IBM Deliverable that requires client approval (DAD)
 - Client Deliverable to IBM
 - A Deliverables list
- **What are the attributes of a Contract Deliverable?**
 - A Contract Deliverable can be a top-level record or a child of a Contract Change record
 - A Contract Deliverable can have the following child records associated with it: Action, Approval, Attachment, Comment, Issue and Risk

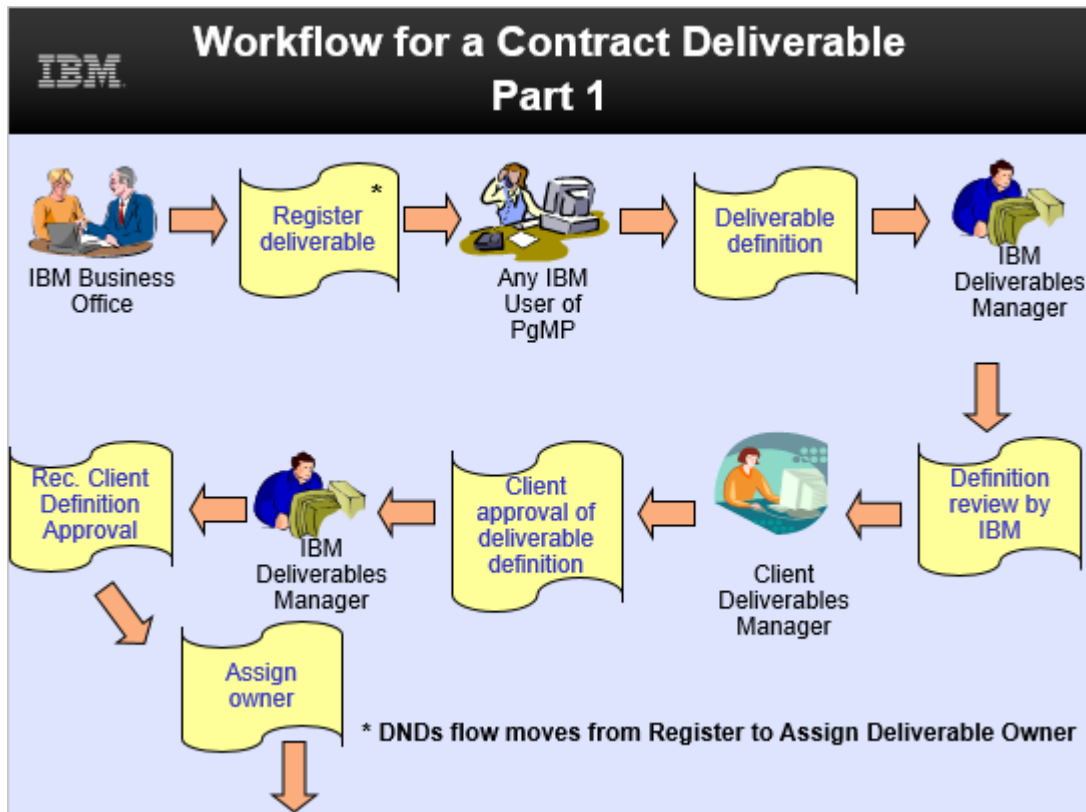


Image Description: The IBM Business Office role Registers the deliverable in the tool. Then any IBM User of PgMP can Define it. The IBM Deliverables Manager Reviews the definition, approves it, and records the Client's approval, and assigns the Deliverable an owner. Text on the image states, "DNDs flow moves from Register to Assign Deliverable Owner". There is an * next to Register deliverable in the graphic.



Workflow for a Contract Deliverable Part 2

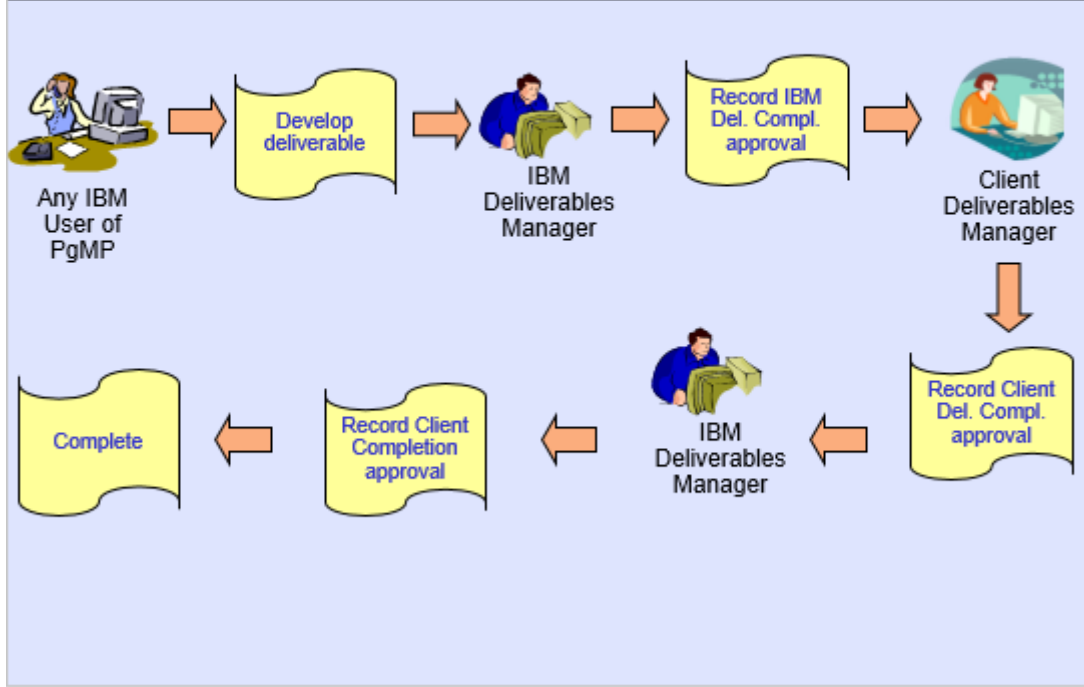


Image Description: Next any IBM User of PgMP develops the deliverable and passes it on to the IBM Deliverables Manager who Records IBM's Deliverable Completion approval. Next the Client Deliverables Manager who Records the Client's Deliverable Completion approval and sends it on to the IBM Deliverables Manager who Records the Client's Completion approval, and this completes the process.

9.11. Issues Object Workflow

- **What is an Issue Object?**
 - An issue that requires the intervention of the Project Executive and / or the Account management team to facilitate resolution.
- **What are the attributes of an Issue?**
 - An Issue can be a parent record or a child of another record.
 - Any IBM or Client user of PgMP can create a Program Issue.
 - An Issue can be made Public, IBM-only or IBM-Restricted Only.
 - An Issue can have the following child records associated with it:
 - Actions
 - Approvals
 - Attachments
 - Comments
 - Notes

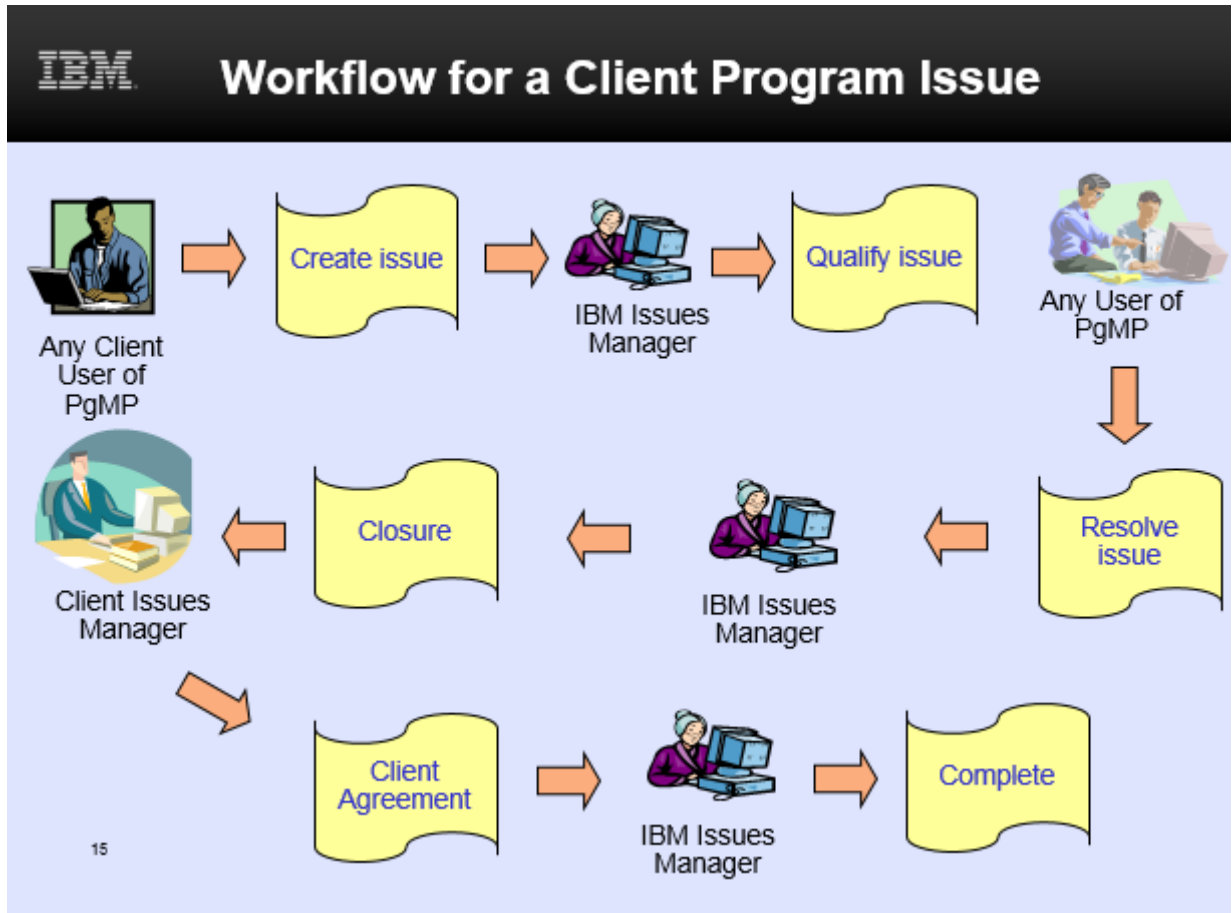


Image Description: Any Client user creates the issue. Then, the IBM Issues Manager qualifies it. Any user of PgMP can resolve the issue and finally the IBM Issues Manager completes the process with the Client Issues Manager's agreement.

9.12. Project Change Request (PCR) Object Workflow

- **What is Project Change Request?**
 - A Project Change Request or PCR is a directive to implement a change to an approved Request for Service.
- **What are the attributes of a Project Change Request?**
 - A PCR can only be a child of a Project or Request record.
 - An IBM RFS Manager or a Client Requestor can create a Project Change Request.
 - A PCR can be marked Public, IBM-Only, or IBM Restricted Only.
 - A PCR can have the following child records associated with it:
 - Actions
 - Approvals
 - Attachments
 - Comments
 - Issues
 - Notes
 - Risks

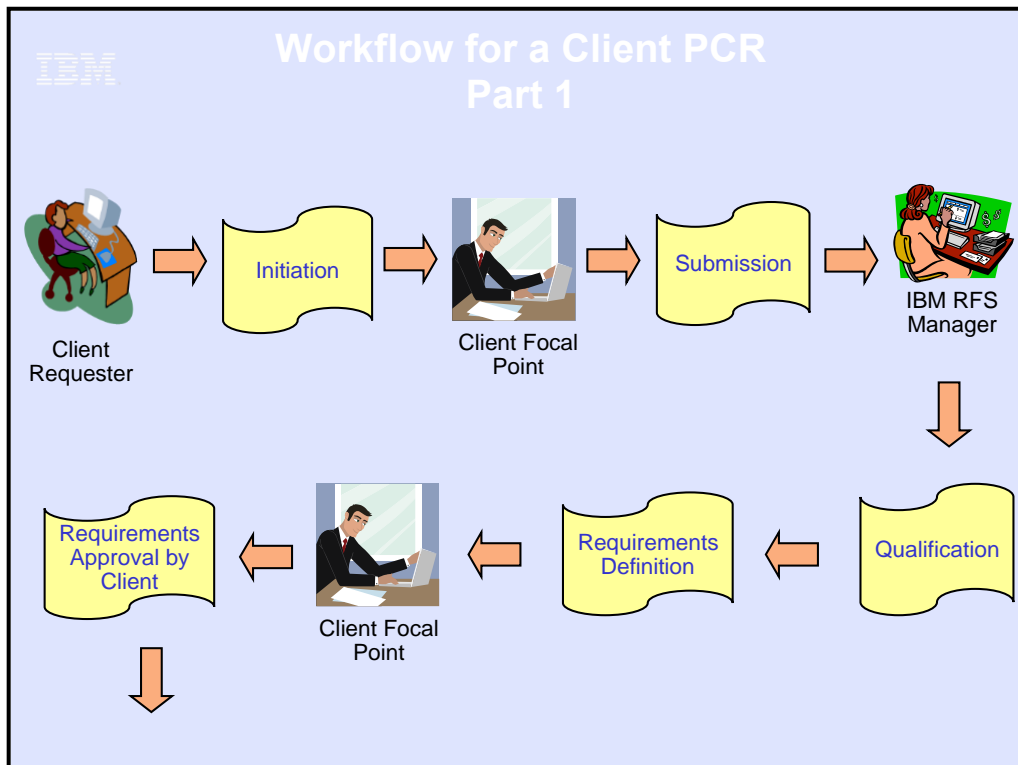


Image Description: The Client Requestor initiates the PCR. Then the Client Focal Point Submits the PCR, the IBM RFS Manager qualifies it and defines the requirements. The Client Focal Point approves the requirements for the client side and the process is continued the next page.

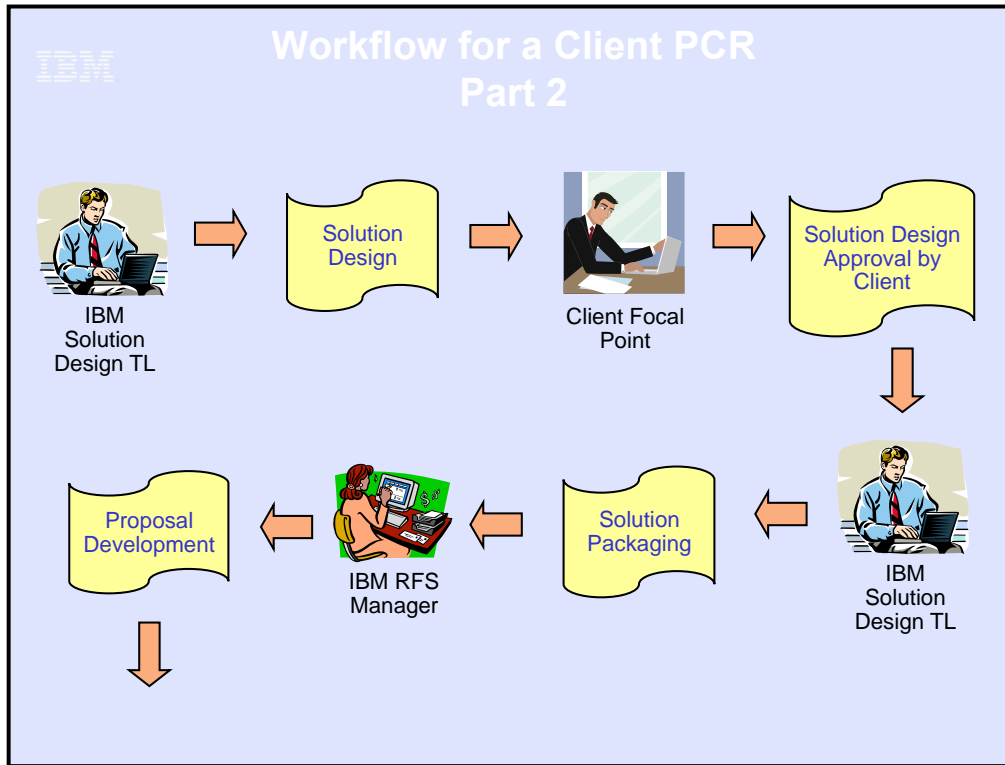


Image Description: The IBM Solution Design TL designs the solution, the Client Focal Point provides the Client's approval of the solution design. The IBM Solution Design TL packages the solution, the IBM RFS Manager develops the proposal and the process is continued in the next image.

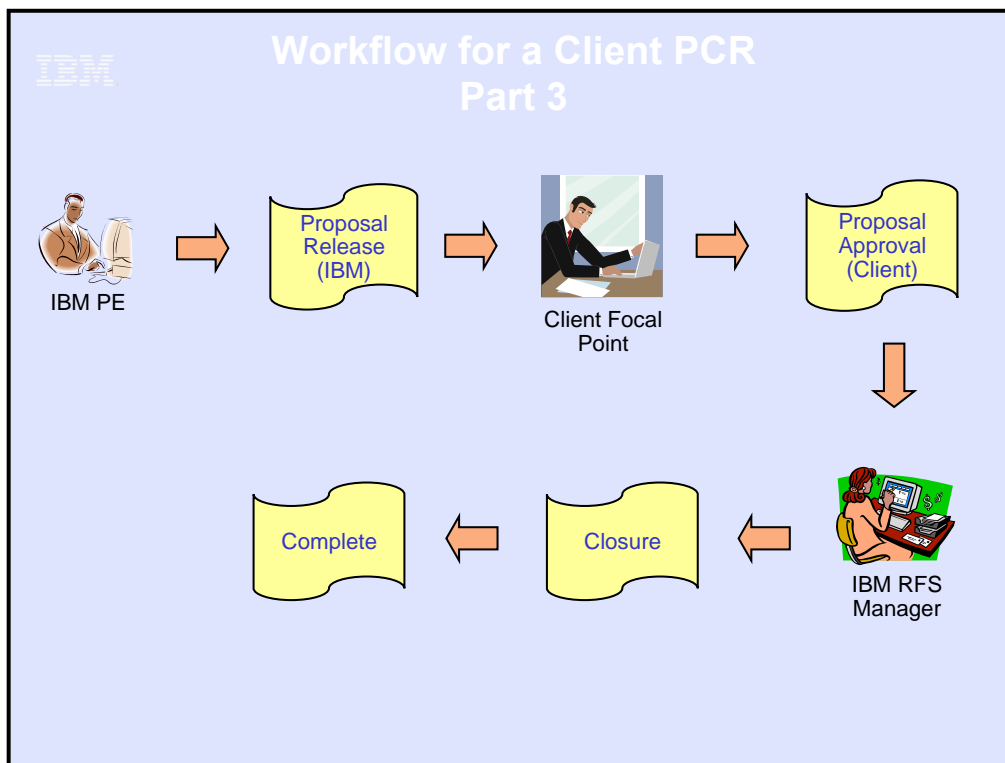


Image Description: The IBM PE proposes the release of the PCR by IBM. The Client Focal Point provides the client's approval of the proposal. There is an optional loop for the IBM PE to countersign a proposal after the Client has approved. The IBM RFS Manager closes the RFS and this completes the process.

9.13. Risk Object Workflow

- **What is a Program Risk?**
 - A Program Risk is a potential event or future situation that may adversely affect the program that requires the intervention of the PE and / or the Account management team to facilitate effective management.
- **What are the attributes of a Program Risk?**
 - A Program Risk can be a standalone record or a child or another record
 - Any IBMer or Client can create a Program Risk
 - A Program Risk can be made Public, IBM-only or IBM-Restricted Only
 - A Program Risk can have the following child records associated with it:
 - Actions
 - Approvals
 - Attachments
 - Comments
 - Issues
 - Notes

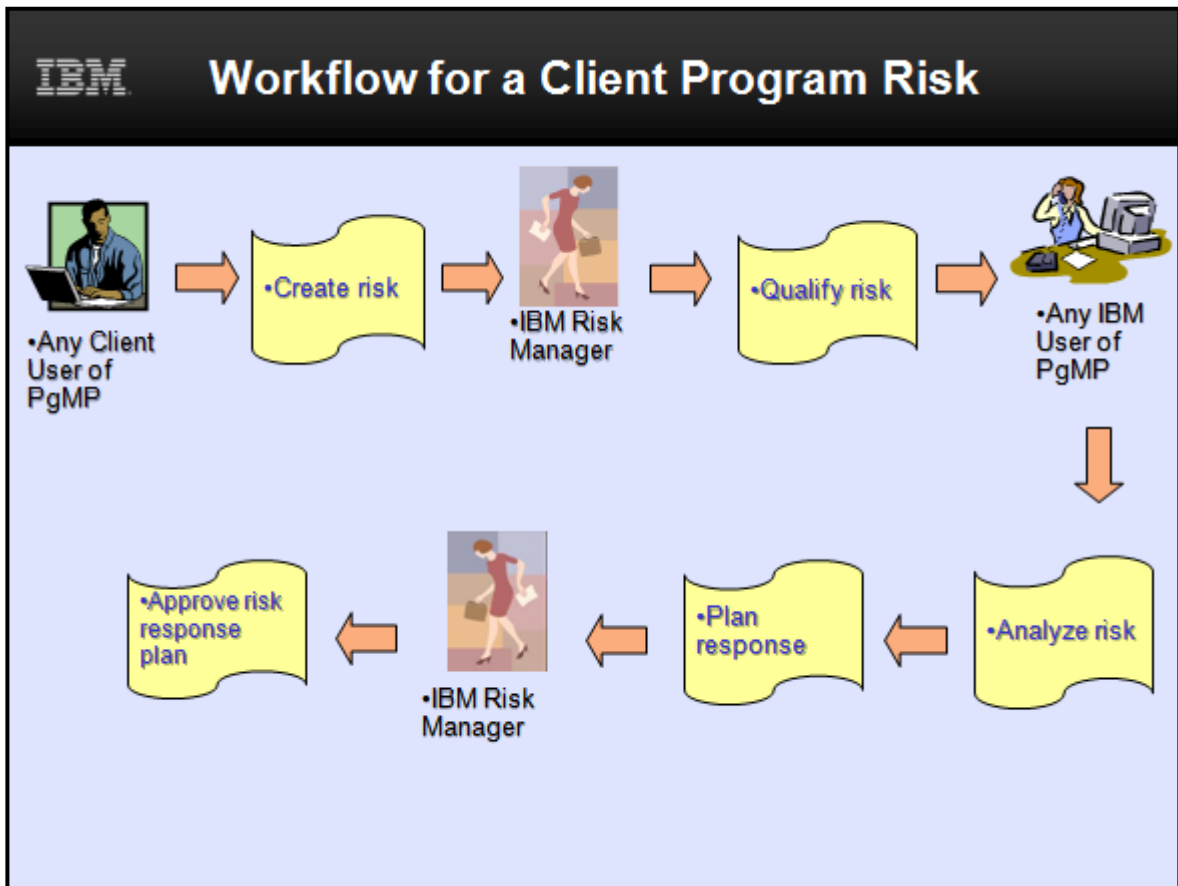


Image Description: Any Client user of PgMP can create a risk. The IBM Risk Manager qualifies the risk; any IBM user of PgMP can analyze the risk and plan a response. The IBM Risk Manager approves the risk response plan.



Workflow for an Client Program Risk Part 2

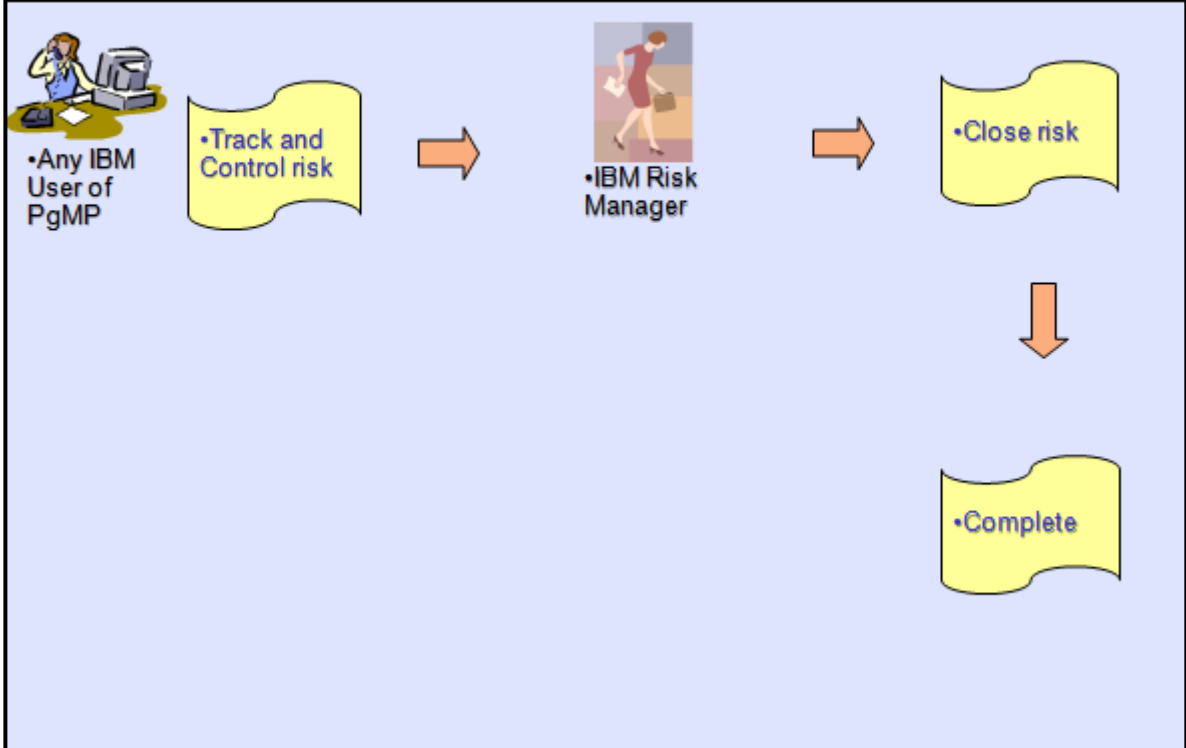


Image Description: Any IBM user of PgMP can Track and Control a risk. Finally, the IBM Risk Manager closes the risk and this completes the process.

Chapter 10. Exports

Clients can export information out of PgMP by going to the Export file section of the top navigation under Create. Once a user clicks on Export file they will see the Exports page. There are four batch exports available in PgMP, Export record log and Export record history, shown here, as well as Attachment and PDF exports which are requested from other sections of the tool but whose results appear on this page. A “Manage scheduled exports” link is also located on the Exports page to access exports that have been scheduled.

IBM Program Management Portal

Create Lists Search PgMP Settings

PgMP Home >

PgMP record

Export file

Exports

Request an export by clicking one of the following choices. Export files are produced by a batch process and made available to you in the list below when they are ready. Click the title of a completed request to download the export file to your workstation. The results might not include any changes you have made within the past 10 minutes. Export files are kept in PgMP for seven days and then are deleted.

PgMP can run up to 5 export requests at the same time. Currently there are 1 request(s) running and 0 request(s) waiting to run. The request(s) currently running waited an average of 0 minutes to start. The oldest currently running request was started on 06 Jun 2017 at 12:31:31 in your selected time zone.

[Export record log](#)

[Export record history](#)

[Manage scheduled exports](#)

Export results (3)

<input type="checkbox"/>	Export type	Date exported	Export title
<input type="checkbox"/>	History	06 Jun 2017	Weekly RFS Record History
<input type="checkbox"/>	Log	06 Jun 2017	Weekly RFS Logs
<input type="checkbox"/>	PDF	Pending	Audit Prep 06 Jun 2017 at 12:31:05

Showing 1 to 3 of 3 entries

Delete

Previous 1 Next

Note: There is a message on the Export screen that states, “Request an export by clicking one of the following choices. Export files are produced by a batch process and made available to you in the list below when they are ready. Click the title of a completed request to download the export file to your workstation. The results might not include any changes you have made within the past 10 minutes. Export files are kept in PgMP for seven days and then are deleted.”

PgMP lets you know that up to 5 export requests can run at the same time. It also lets you know how many requests are currently running and how many are in the queue. Additionally, it lets you know the average number of minutes the request(s) currently running waited to start and when the oldest currently running request was in your selected time zone.

Exports can be deleted by putting a check in the box to the left of the desired Export and clicking the Delete button.

Any exported attachments will also appear on this page. Click the Export title to access the documents. Exported attachments are added to PgMP as a zip file.

There is an option to "Export combined Request, Catalog- Only and PCR records"

Export combined Request, Catalog-Only and PCR records:	<input checked="" type="checkbox"/>
--	-------------------------------------

Users select individual positions, All production, All test, or All production and test positions for an export

Export data for all positions:*	Positions selected above ^
Top-level record state:*	Positions selected above
Child record state:*	All production positions
Export combined	All test positions
	All production and test positions

10.1. Export record log

The Export record log provides Clients a listing of the fields for selected records. Users can choose one or all positions they hold on an account. He or she can then elect to choose all or some Top-level or parent records, in Active, On hold or Completed states as well as All or select Child record types in Active, On hold or Completed states.

Text on the screen instructs users how to perform the export. It also informs the user that their request will be queued for processing and that the exported data will be emailed to the user with detailed instructions. Additionally, users are cautioned to limit the amount of data requested to the minimum needed to avoid certain system limitations.

Title:*	<input type="text"/>
Position:*	<input type="text"/>
Export data for all positions:*	Positions selected above <input type="button" value="v"/>
Top-level record state:*	<input type="checkbox"/> Active <input type="checkbox"/> On hold <input type="checkbox"/> Completed
Child record state:*	<input type="checkbox"/> Active <input type="checkbox"/> On hold <input type="checkbox"/> Completed
Export combined Request, Catalog-Only and PCR records:	<input checked="" type="checkbox"/>
Top-level record types:	<input type="text"/>
Child record types:	<input type="text"/>
Scheduled Date(s):*	<input checked="" type="radio"/> Immediately <input type="radio"/> Single Date <input type="radio"/> Daily or weekly <input type="radio"/> Monthly - first day of the month <input type="radio"/> Monthly - last day of the month <input type="radio"/> Monthly - a specific day of the week
	<input type="radio"/> Quarterly
	<input type="button" value="Submit"/> <input type="button" value="Cancel"/>

Unique ID	Displayed ID	Client reference #	Title	Record type	Description	Step name	State	Status	Assigned to
8853	CORE-REQ-000001		Additional DASD for KPL	REQUEST	The KPL site requires additional DASD	Requirements definition	A	RFSSDRWK	Roper, Keelin T.
8854	CORE-REQ-000002		Additional DASD for Godbey Pines	REQUEST	The Godbey Pines site requires additional DASD	Initiation/Rework	A	RFSINFO	Roper, Keelin T.
9580	CORE-REQ-000003		Computer Refresh	REQUEST	Tri annual Computer Refresh	Initiation/Rework	W	SAVE	Roper, Keelin T.
9583	CORE-REQ-000004		Infrastructure Review	REQUEST	Infrastructure Review is required for this site.	Solution design	A	RFSAPRRQ	Sledge, Cheryl C.
9703	CORE-REQ-000005		Annual Disaster Recovery Test	REQUEST	This is a high priority for the new executives.	Acknowledgement	A	REQFPSUB	Sledge, Cheryl C.
9819	CORE-REQ-000006		4Q Server Change out	REQUEST	Change out is required by the contract	Proposal development	A	RFSPRRQ1	Roper, Keelin T.
9870	CORE-REQ-000007		Hudson Valley Site AS400 Upgrade	REQUEST	gh	Closure	Q	RFSPRREJ	Roper, Keelin T.

10.2. Export history log

The Export record history provides the history of the steps a record has gone through, the user assigned to each step and the time and date it was changed. It has the same export options as the Export Record Log, users can choose all or some Top-level and Child record types in Active, On hold or Completed states.

Text on the screen instructs users how to perform the export. It also informs the user that their request will be queued for processing and that the exported data will be emailed to the user with detailed instructions.

IBM Program Management Portal

Create Lists Search PgMP Settings

Export record history

PgMP record

Export file

Enter a title for your export, then select the export filters below and click Submit. Select multiple positions or record types in a list by holding the Ctrl key when you click the choices. Select all record types in a list by clicking the first choice in the list and then clicking the last entry in the list while holding the Shift key. Your request will be queued for processing, and you will be notified by email when your export file is available.

Title:

Position:

Top-level record state: Active On hold Completed

Child record state: Active On hold Completed

Top-level record types:

Child record types:

Record ID	Record Type	Contract Name	Record Number	Title	IBM Step	Time Stamp	User	Action Taken
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Initiation/Rework	01:49.4	Sledge, Cheryl C.	Submit request
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Manage request	17:34.9	Roper, Keelin T.	Process request as a Firm (Best
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Qualification	22:29.4	Roper, Keelin T.	Accept the RFS and proceed to r
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Requirements definition	45:33.3	Roper, Keelin T.	Saved
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Requirements definition	32:15.2	Birrell, David J.	Mark requirements as complete
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Solution design	32:33.0	Birrell, David J.	Request rework of the requirem
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Requirements definition	14:03.1	Roper, Keelin T.	Saved
8853	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000001	Additional DASD for KPL	Requirements definition	26:07.0	Roper, Keelin T.	Saved
8854	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000002	Annual Disaster Recovery Test	Initiation/Rework	03:25.0	Sledge, Cheryl C.	Submit request
8854	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000002	Annual Disaster Recovery Test	Manage request	06:22.5	Sledge, Cheryl C.	Saved
8854	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000002	Annual Disaster Recovery Test	Manage request	13:28.3	Roper, Keelin T.	Process request as a Firm (Best
8854	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000002	Annual Disaster Recovery Test	Qualification	59:57.7	Roper, Keelin T.	Request more information
8854	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000002	Annual Disaster Recovery Test	Step Unchanged	13:10.8	Roper, Keelin T.	Put on Hold
8854	REQUEST	Test - Core Business Team - General Users	CORE-REQ-000002	Annual Disaster Recovery Test	Initiation/Rework	14:06.7	Roper, Keelin T.	Saved

10.3. Manage scheduled Exports

Request logs can be scheduled to be run daily, weekly, monthly or quarterly if desired as well as once on a specific date. We will cover this feature in this and the next slide. When users click on Export record log from Exports he or she will find Scheduled Date(s) section shown here. This section defaults to an immediate export as previously done but it can be changed for one date in the future or a repeating frequency in the future.

Top-level record types:*

Child record types:

Scheduled Date(s):* Immediately
 Single Date
 Daily or weekly
 Monthly - first day of the month
 Monthly - last day of the month
 Monthly - a specific day of the week
 Quarterly

The first column shown on the Manage scheduled exports section, "Title", lists the scheduled exports and its hotspot which allows users to alter future exports. Buttons located here allow users to Delete, disable existing scheduled export requests or Enable previously Disabled export report requests. Note: Users should remove a scheduled request when it is no longer needed as it will cause other exports to take longer to run. PgMP will periodically check to see whether scheduled exports are being accessed and if they are not accessed for more than 6 weeks PgMP will send the user an email warning that the export will be disabled if it is not accessed in the next week. Disabled reports can be re-enabled if required.

PgMP Home > Export file >

Manage scheduled exports

The table displays all export requests that are scheduled for you. Click a title to modify that export request, or use the check boxes to select rows and click a button below the table to remove requests or to enable or disable requests.

Immediate requests and single date requests for a time in the past are not shown in this table.

<input type="checkbox"/>	Title	Next scheduled date and time
<input type="checkbox"/>	Keelin's Test RL Managed 2	Disabled
<input type="checkbox"/>	Keelin's Weekly Log report	08 Jun 2017 10:00:00
<input type="checkbox"/>	KTR Test 4 Managed export	Disabled
<input type="checkbox"/>	Monthly RFS Log	30 Jun 2017 12:00:00
<input type="checkbox"/>	Weekly Issues Log	13 Jun 2017 7:30:00

Showing 1 to 5 of 5 entries

Previous
1
Next

10.4. Exported Attachments

Attachment exports are requested from other sections of the tool but their results appear on the Exports page. Multiple attachments can be exported from the Search for attachments view or a record's Attachment list. Users place checkmarks in the checkboxes to the left of the attachments they wish to export and click the Export button. A pop up window lets users know, "Provide a title for this export request and click OK. Export files are produced by a batch process and are made available for you to download usually within an hour. An email will be sent once the download is complete and the user can click on the link provided in the email or directly on Exports from the left-hand navigation to locate them. Attachments are provided to users in the Export section of the tool in a zipped file.

IBM Program Management Portal

PgMP Home >

Create Lists Search PgMP Settings

PgMP record

Export file

Exports

Request an export by clicking one of the following choices. Export files are produced by a batch process and made available to you in the list below when they are ready. Click the title of a completed request to download the export file to your workstation. The results might not include any changes you have made within the past 10 minutes. Export files are kept in PgMP for seven days and then are deleted.

PgMP can run up to 5 export requests at the same time. Currently there are 0 request(s) running and 0 request(s) waiting to run.

[Export record log](#)

[Export record history](#)

[Manage scheduled exports](#)

Export results (2)

<input type="checkbox"/>	Export type	Date exported	Export title
<input checked="" type="checkbox"/>	Attachments	06 Jun 2017	Attachments as of June 5, 2017
<input type="checkbox"/>	PDF	06 Jun 2017	Audit Prep 06 Jun 2017 at 12:31:05

Showing 1 to 2 of 2 entries

Previous 1 Next

Delete

10.5. Export Changes - New Fields Must Be Applied to Custom Reports

- Accounts that use custom labels will want to work with their representative to obtain the account specific export files.
- Owners of custom reports that use the PgMP Exports as their base input file will want to work with these representatives so they may apply the new fields to their custom reports ahead of PgMP Release 17.7.

10.6. Exported PDF Files

PDF exports are requested from other sections of the tool but their results appear on the Exports page. PDF exports can be exported from the Search for records view but also from the Take Action column of a work queue. In this case users choose the data to include: record types, Personal Information, cost and Price and sections (Details, Supporting Assets /Attachments list and/or Notes). Once the options are selected the message shown here appears letting the Requestor know the export has been submitted and will appear in the Exports section in the left-hand navigation. An automatic email is also sent when the PDF export is available. It provides a link to view the list of your currently available exported files.

IBM Program Management Portal

PgMP Home >

Create Lists Search PgMP Settings

PgMP record

Export file

Exports

Request an export by clicking one of the following choices. Export files are produced by a batch process and made available to you in the list below when they are ready. Click the title of a completed request to download the export file to your workstation. The results might not include any changes you have made within the past 10 minutes. Export files are kept in PgMP for seven days and then are deleted.

PgMP can run up to 5 export requests at the same time. Currently there are 0 request(s) running and 0 request(s) waiting to run.

[Export record log](#)

[Export record history](#)

[Manage scheduled exports](#)

Export results (2)

<input type="checkbox"/>	Export type	Date exported	Export title
<input type="checkbox"/>	Attachments	06 Jun 2017	Attachments as of June 5, 2017
<input checked="" type="checkbox"/>	PDF	06 Jun 2017	Audit Prep 06 Jun 2017 at 12-31-05

Showing 1 to 2 of 2 entries

Previous 1 Next

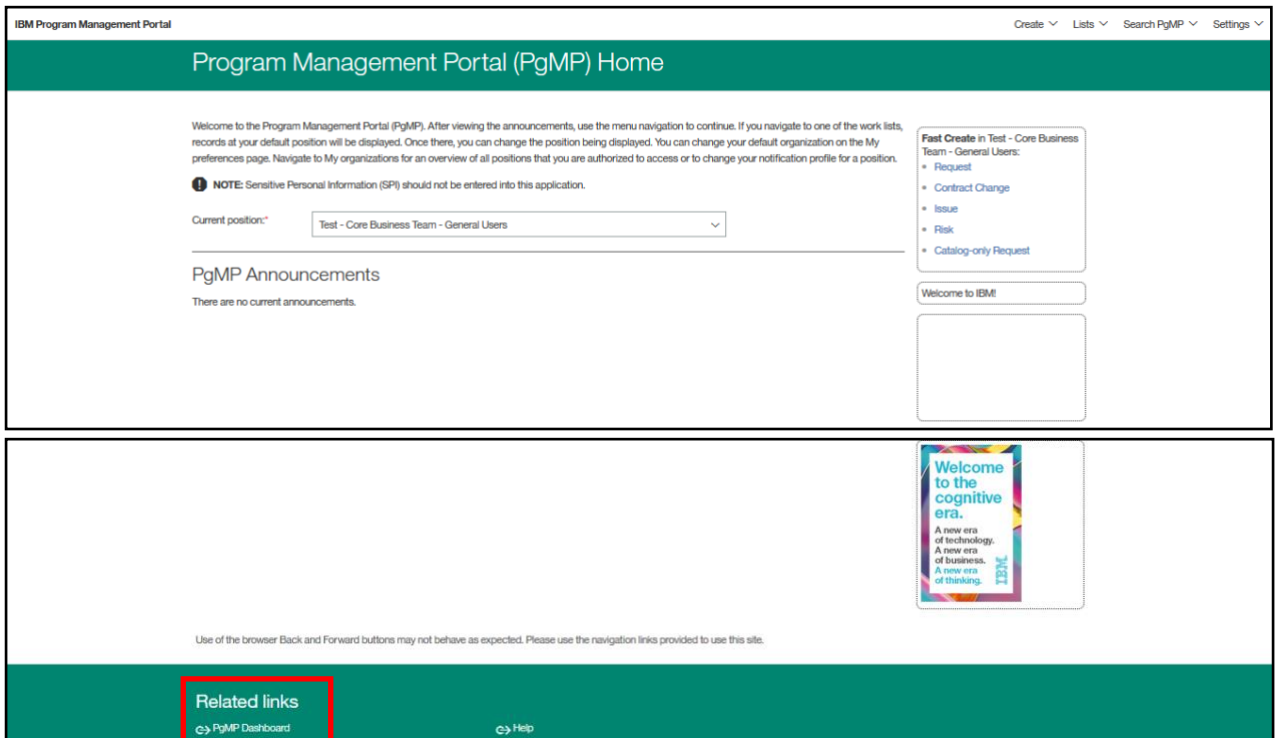
Delete

Chapter 11. PgMP Dashboard

The PgMP Dashboard supports the management of PgMP records and facilitates collaboration between clients and IBM. It currently provides views of RFS, Catalog-only and/or PCR, Issues, Risks, Contract Changes, or Contract Deliverables data that can not only be configured to fit your needs but also be saved for future use and shared with others. Other record types will be covered in future releases to create a PgMS based Contract Governance dashboard for both the Client and IBM.

11.1. Accessing Dashboard

To access the PgMP Dashboard click on “PgMP Dashboard” under Related Links on the PgMP left hand navigation.



11.2. Welcome Page

Users can multi select the Contract name or names he or she would like to view in PgMP and choose the Record type or types: RFS, Catalog-only and/or PCR, Issues, Risks, Contract Changes, or Contract Deliverables data for the requested Contract.

11.3. Custom Views

This section provides the ability to customize your view of RFS, Catalog-only and/or PCR, Issues, Risks, Contract Changes, or Contract Deliverables data. You choose which view you would like using the Record Type filter on the Welcome page. Custom Views provide quick overviews of the current status of in-flight RFS and Catalog-only records and/or PCRs and allows users to create notes called “Annotations” for any PgMP record shown here. In addition, customized views can be created for particular client, IBM, or collaborative purposes, including joint status review meetings and client internal review requirements. These customized views are saved as templates for repeated use and can be exported as .csv or .xls files.

Annotation/Details	Record ID	Title	Client reference #	Phase	Request received by IBM date	Client proposal requested date	Client revised proposal requested date	Proposal sent to client date	Proposal accepted date	Planned implementation completed date	Client requested implementation complete date	Client revised requested implementation complete date	Status
2+ [icon]	CORE-REQ-000004	Infrastructure Review		Solution design	13 November 2011	23 December 2011							Omega
2+ [icon]	CORE-REQ-000005	Annual Disaster Recovery Test		Initiation									Yet to be added

11.4. Annotations

Annotations can be added, viewed, completed or deleted.

Annotation/Details	Record ID	Title	Client reference #	Phase	Request received by IBM date	Client proposal requested date	Client revised proposal requested date	Proposal sent to client date	Proposal accepted date	Planned implementation completed date	Client requested implementation complete date	Client revised implementation complete date	Status
2	BSI-REQ-000001	Maple Street Upgrade		Implement-ation	14 April 2014	14 April 2014		14 April 2014	14 April 2014		09 May 2014		Yet to be added
Due date	Annotation											Completed	
11/18/2016	We need a plan in place before Thanksgiving											<input type="checkbox"/> Delete	
12/23/2016	The Upgrade is back on and we need it done before year end											<input type="checkbox"/> Delete	
												Add annotation	

11.5. My saved templates

This section lists the templates that have been customized by an individual. Customizations include the ability to select and order PgMP fields and add filters to template views. Templates can be named and saved for later use and can also be shared with others.

My saved templates			
Welcome	Custom views	My saved templates	Help
Saved templates			
Name	Description	Saved date	
PgMP Dashboard default template	PgMP Dashboard default template	N/A	Open
Template for senior staff meetings	Focus on proposal due dates and new RFSs	01 May 2014	Open Delete
Tuesday meeting template	Template created for recurring meeting on Tuesdays at 8 am	01 May 2014	Open Delete
Templates shared with others			

11.6. Survey Fields Visible in Dashboard and Available for Export

As part of further Medallia survey solution integration in PgMP, two new survey fields (Proposal survey recipient and Implementation survey recipient) will be available in Custom View within PgMP Dashboard.

State: Active | Record type: Request And Catalog-only Request | Contract name: Test - Core Business Team - General Users

Add filters | Customize table fields

1-10 of 132 results | Next →

Annotation/Details	Record ID	Title	Client reference #	Phase	Request received by IBM date	Proposal sent to client date	Proposal accepted date	Client requested implementation complete date	Client revised requested implementation complete date	Proposal survey recipient	Implementation survey recipient
0 +	CORE-REQ-000167	e-signature delegation	123456789	Proposal development	22 August 2017	22 August 2017				Packova,KatkaClient katarina.packova@gmail.com	
0 +	CORE-REQ-000166	Nair2- 1client opts out		Proposal development	22 August 2017	22 August 2017				Packova,KatkaClient katarina.packova@gmail.com	

The custom view templates can be:

- saved for later use

Welcome | Operational views | Custom views | **My saved templates** | Help

Saved templates

Name	Description	Saved date	
PgMP Dashboard default template	PgMP Dashboard default template	N/A	Open
Michal's Template		18 August 2017	Open Delete

- shared with other users

My saved templates

Welcome | Operational views | Custom views | **My saved templates** | Help

Saved templates

Templates shared with others

Name	Description	Shared date	
Michal's Template - Survey recipient Fields		23 August 2017	Open Delete

The PgMP data shown here is refreshed at least every 15 minutes.

The Dashboard view including the new survey fields can be exported to CSV file.

Record ID	Title	Client reference #	Phase	Request received by IBM date	Proposal sent to client date	Proposal accepted date	Client requested implementation complete date	Client revised requested implementation complete date	Proposal survey recipient	Implementation survey recipient
2 000145	CORE-REQ- Test Scenario - Firm Request Workflow - Survey - Imported		Implement-ation	0003-08-17	0003-08-17	0003-08-17	0024-08-17		Dabkowski,Stanislaw michal@dabkowscy.me	Dabkowski,Stanislaw michal@dabkowscy.me
3 000145	CORE-REQ- Test Request - Medallia		Proposal development	26-07-17					Dabkowski,Stanislaw michal@dabkowscy.me	Dabkowski,Stanislaw michal@dabkowscy.me
4 000145	CORE-REQ- Test Request - Medallia		Acknowledge and	26-07-17					Dabkowski,Stanislaw michal@dabkowscy.me	Dabkowski,Stanislaw michal@dabkowscy.me
5 000139	CORE-REQ- Test Request for Screenshots		Acknowledge and quality	21-07-17						
6 000138	CORE-REQ- test - met implementation 2	test	Implement-ation	20-07-17	20-07-17	20-07-17	19-07-17			

Users can see the fields and their values, according to normal Dashboard and PgMP rules including authorization for Personal Information display. If the user type could not see a value now for the field if they opened the record in the Portal, then no value is shown in the Dashboard. These fields are included in the Dashboard export, subject to all the same rules. The special **"None available"** value is shown if the record is at a point in the workflow when that field is shown in the RFS records. This occurs if there are no client users holding a role used to assign the recipient **AND** the record has been saved at or following a step where the recipient field became mandatory. Users should not confuse this with empty fields prior to the time that data can be stored in this field.

11.7. Adding of "Created by" field as filter in client PgMP dashboard

A **"Created by"** field as a filter in the client PgMP dashboard has been added.

The requester field in PgMP portal does not address its absence, as this field is updated with the "Created By" name by default, but later during the life cycle of the record can be updated and overwritten.

Criteria:

- The "Created By" field is offered as a filter on the "Custom Views" tab.
- When the "Created By" field is chosen as a filter, the list of users in the Add Filters overlay contains all users, who have created a record within the current range of displayable records.
- Users are displayed in the list of users in the "Add Filters" overlay in the same manner and style as users are listed when the "Assigned to" filter is chosen.
- Multiple users can be selected or deselected as values for the "Created By" filter, just like they can currently be for the "Assigned To" filter, by use of the ">" and "<" buttons.
- When users are selected in the overlay and then the Close button is clicked in the overlay, the selected users are displayed separately as "Created by" filter values in the filter area on the underlying "Custom Views" page.
- Once "Created By" users are displayed in the filter area on the "Custom Views", the list of records will correctly show all records created by those users and no records created by any other users.
- When other fields are also filtered, the list of records correctly shows the results of all filters that are specified. Remember that the filters of the same name are combined with "OR"

operator together, and those groups are then combined with “AND” operator together to determine the records that should be displayed.

Custom views

Welcome | Operational views | **Custom views** | My saved templates | Help

Using saved template: Default template

Templates can be customized by selecting the Customize table fields button. A list of fields in PtiMP will be presented and items from the list can be added or deleted and the selected fields can be ordered. In addition, the data in the table views can be filtered by selecting the Add filters button. The new template can then be named and saved for later use by selecting the Save or Save as... button and can be shared by selecting the Share button.

View annotations | Share | Save as...

Configure template

Public view is off | Default template | Export

State: Active | Contract name: Test - Core Business Team - General Users | Record type: Request And Catalog-only Request

Add filters | **Customize table fields**

1 of 240 results | Next →

Annotation/Details	Record ID	Title	Client reference #	Phase	Request received by IBM date	Client proposal requested date	Client revised proposal requested date	Proposal sent to client date	Proposal accepted date	Planned implementation completed date	Client requested implementation complete date	Client revised requested implementation complete date	Status
0 +	CORE-REQ-000091	Additional DASD for KPL		Requirements definition	26 October 2011	26 October 2011							Testing Status field
2 +	CORE-REQ-000094	Infrastructure Review		Solution design	13 November 2011	23 December 2011							Omega
0 +	CORE-REQ-000096	4Q Server Change out		Implementation	16 November 2011	16 November 2011		23 November 2012	24 November 2012		24 November 2012		Chi
0 +	CORE-REQ-000099	Laptop Refresh		Acknowledge and quality	22 November 2011	23 December 2011							Yet to be added
0 +	CORE-REQ-000111	Control data test for asd David Orrell		Proposal development	28 November 2011	29 November 2011					08 December 2011		Yet to be added

Choose table fields

Table fields:

cre

Created date (public)

Selected table fields:

Record ID (public)

Title (public)

Client reference # (public)

Phase (public)

Created by (public)

Request received by IBM date (public)

Client proposal requested date (public)

Client revised proposal requested date (public)

Proposal sent to client date (public)

Proposal accepted date (public)

Planned implementation completed date (public)

Client requested implementation complete date (public)

Client revised requested implementation complete date (public)

Status (public)

Move up

Move down

Close

Custom views

Welcome | Operational views | **Custom views** | My saved templates | Help

Using saved template: Default template

Templates can be customized by selecting the Customize table fields button. A list of fields in PtgMP will be presented and items from the list can be added or deleted and the selected fields can be ordered. In addition, the data in the table views can be filtered by selecting the Add filters button. The new template can then be named and saved for later use by selecting the Save or Save as... button and can be shared by selecting the Share button.

View annotations | Share | Save as...

Configure template

State: Active | Record type: Request And Catalog-only Request | Contract name: Test - Core Business Team - General Users

Public view is off | Default template | Export

Add filters | **Customize table fields**

1-10 of 240 results | Next →

Annotation/Details	Record ID	Title	Client reference #	Phase	Created by	Request received by IBM date	Client proposal requested date	Client revised proposal requested date	Proposal sent to client date	Proposal accepted date	Planned implementation completed date	Client requested implementation complete date	Client revised requested implementation complete date	Status
0 +	CORE-REQ-000001	Additional DASD for KPL		Requirements definition	Cheryl C. Sledge	26 October 2011	26 October 2011							Testing Status field
2 +	CORE-REQ-000004	Infrastructure Review		Solution design	Keelin Roper	13 November 2011	23 December 2011							Omega
0 +	CORE-REQ-000005	4Q Server Change out		Implement-ation	Charyl C. Sledge	16 November 2011	16 November 2011		23 November 2012	24 November 2012		24 November 2012		Chi
0 +	CORE-REQ-000009	Laptop Refresh		Acknowledge and quality	Keelin Roper	22 November 2011	23 December 2011							Yet to be added
0 +	CORE-REQ-000011	Control data test for David Birrell	asd	Proposal development	David J. Birrell	28 November 2011	29 November 2011					08 December 2011		Yet to be added

Add filters

Select filter field:

- Complexity
- Contract name
- Created by
- Customer name
- Record type

Cheryl C. Sledge

David Birrell

David J. Birrell

Hema Raqhava

>
<

Cheryl C. Sledge

Close

Custom views

Welcome Custom views My saved templates Help

Using saved template: Default template

Templates can be customized by selecting the Customize table fields button. A list of fields in PgMP will be presented and items from the list can be added or deleted and the selected fields can be ordered. In addition, the data in the table views can be filtered by selecting the Add filters button. The new template can then be named and saved for later use by selecting the Save or Save as... button and can be shared by selecting the Share button.

View annotations Share Save as...

Configure template

State: Active Record type: Request And Catalog-only Request Contract name: Test - Core Business Team - General Users Created by: Cheryl C. Sledge

Public view is off Default template Export

Add filters Customize table fields

1.10 of 22 results | Next →

Annotation/Details	Record ID	Created by	Title	Client reference #	Phase	Request received by IBM date	Status
2	CORE-REQ-000001	Cheryl C. Sledge	Additional DASD for KPL		Requirements definition	26 October 2011	Yet to be added
0	CORE-REQ-000002	Cheryl C. Sledge	Test Record - Select Region Not Configured Value		Initiation	26 October 2011	Yet to be added
0	CORE-REQ-000006	Cheryl C. Sledge	IQ Server Change out		Proposal development	16 November 2011	Yet to be added
0	CORE-REQ-000042	Cheryl C. Sledge	Kevin's Catalog Test		Acknowledge and qualify	09 April 2013	Yet to be added
0	CORE-REQ-000059	Cheryl C. Sledge	983127 1015899 1012390 -980689		Solution design	08 September 2015	Yet to be added
0	CORE-REQ-000062	Cheryl C. Sledge	Demo Approval Profile - Create		Acknowledge and qualify	14 September 2015	Yet to be added

Chapter 12. PgMP 18.3 Enhancements

12.1. PgMP Portal – Add “Take action” button to the record details section

A new “Take Action” drop down menu will be available for the Client users with options list with those that are available for them within the Record Details page of the PgMP Record.

- The Take Action drop down menu will be located to the right side of the page and on top of the PgMP Record

The screenshot displays the PgMP portal interface. At the top, there is a green header bar with the breadcrumb 'PgMP Home > My work >'. Below this, the title 'Request for Service REQ-000071' is prominently displayed. The main content area contains a list of details for the record, including Title, Contract, Current step, Client, Current status, and Assigned to. On the right side of the page, a 'Take action' dropdown menu is open, showing a list of options: 'Add new attachment ...', 'Copy', 'Move to another position ...', 'Export as PDF ...', 'Reassign ...', 'Subscribe', 'Delete ...', 'Place on hold ...', 'Withdraw ...', 'Open as Super User', and 'Change step...'. The dropdown menu is highlighted with a red border.

PgMP Home > My work >

Request for Service REQ-000071

Title:	eSig for reviewers
Contract:	Test - Krishna Murthy - Testing Account
Current step (to IBM):	Record client approval of the proposal
Current step (to Client):	Proposal approval
Current status:	Awaiting client approval of the proposal to be obtained outside of PgMP.
Assigned to:	Nanjundappa, Krishna M. (krishnmu@in.ibm.com)

- Take action ^
- Add new attachment ...
- Copy
- Move to another position ...
- Export as PDF ...
- Reassign ...
- Subscribe
- Delete ...
- Place on hold ...
- Withdraw ...
- Open as Super User
- Change step...

12.2. PgMP Portal - Rename the step from Proposal Development to Proposal Approval when IBM eSignature package is out for approval

Prior to PgMP 18.3 release, after the Proposal was released and sent to the Client for eSignature. Users were confused with the status "Proposal Development" when they accessed the record to review it.

This gave them false impression that what they are approving is not the final proposal. The present Client steps are in the following way,

Client view:

Current step: Proposal Development

Current status: Awaiting proposal approval using IBM eSignature

To remediate this and to avoid potential confusion to the Client users, starting with PgMP 18.3 we will rename the step from Proposal Development to "Proposal Approval" when the IBM eSignature Package is out for approval.

Note: A record in Proposal Approval step for which IBM eSignature is used, the Current status field will indicate at which stage in the IBM eSignature proposal approval this record is at the moment.

For example:

- For records in Proposal Approval step for which the IBM eSignature proposal package is being prepared the Current status will be:
"Preparing IBM eSignature package for proposal approval."
- For records in Proposal Approval step for which the IBM eSignature proposal package has been sent out the Current status will be:
"Awaiting proposal approval using IBM eSignature."

Request for Service CORE-REQ-000271

Title:	Story 1680943 - Rename the step to Client from Proposal Development out for approval
Contract:	Test - Core Business Team - General
Current step:	Proposal Approval
Current status:	Preparing the IBM eSignature package for proposal approval.
Assigned to:	Dabkowski, Stanislaw M.

12.3. IBM eSignature – Visibility over Archived eSignature Packages

PgMP 18.3 will introduce the additional filter option for the eSignature packages list to allow viewing packages that have already been archived post-approval.

- Users will be able to select “Archived” option from the Package status drop down list as shown below
- Once the option is selected, users can view the list of archived packages

IBM Program Management Portal Create ▾ Lists ▾ Advanced search ▾ Settings ▾

Select the organization and other criteria and then click Search. Records containing IBM eSignature packages that are active now or that were approved, declined, expired, or retrieved within the last 60 days are listed. You can further filter by expiration date or by who created the package.

Position:*

Package status:

Package created by:

Expires on/before:

Each PgMP record with an IBM eSignature package that meets the criteria is listed. Under each package, the signers are listed by their signing sequence and alphabetically within the same sequence. Click a record to view that record's details.

[PDF Download as PDF](#) [Download as CSV](#)

<input type="checkbox"/>	▲ Record ID	◆ Client reference	Record title, signer, signing sequence, signing status and date of latest activity
<input type="checkbox"/>	+ CORE-REQ-000258		1624947 - Improve "Please Sign" Reminder
<input type="checkbox"/>	+ CORE-REQ-000259	12345	PD 1596584

Showing 1 to 2 of 2 entries Previous Next

12.4. IBM eSignature - Approval of Implementations - Change Firm RFS Workflows

This change completes Wave 2 of the IBM eSignature integration with PgMP. It enables the use of IBM eSignature for Implementation approvals. Starting with PgMP 18.3 the RFS Firm workflow will introduce new path that will allow IBM eSignature to be used for Implementation approval.

- Once the IBM eSignature package is prepared by IBM, Client users will see the Current step as “Approve Implementation using IBM eSignature”

Request for Service REQ-000071	
Title:	eSig for reviewers
Contract:	Test - Krishna Murthy - Testing Account
Current step:	Approve implementation using IBM eSignature
Current status:	Preparing the IBM eSignature package for implementation approval.
Assigned to:	Nanjundappa, Krishna M.

Notification emails

- Depending on the sequence order set by IBM, Client signer will receive the email notification inviting to review the documents and approve or decline with comments
- Below is a sample email notification received by a Client user

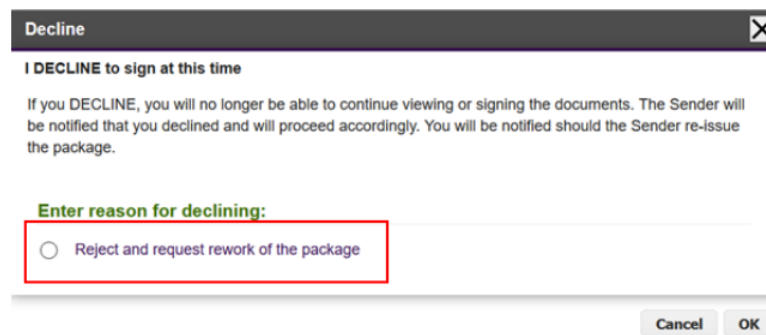


Approval, Delegation of Approval, and Declining of Implementation

- Once the user clicks on the “Go to Documents” button from the email notification, they will be taken to the IBM eSignature application
- User will provide their consent and then they will be taken to the Implementation approval document(s) where they will need to provide their signature (using the method set up for the client signer)
- Depending on the initial Delegation setup done by IBM, the client will be able to Delegate the signing to another signer
- Once the documents have been reviewed the signers will be able to Approve, Delegate signing or Decline the approval
- The options for Delegation or Declining are located at the top of the IBM eSignature application window

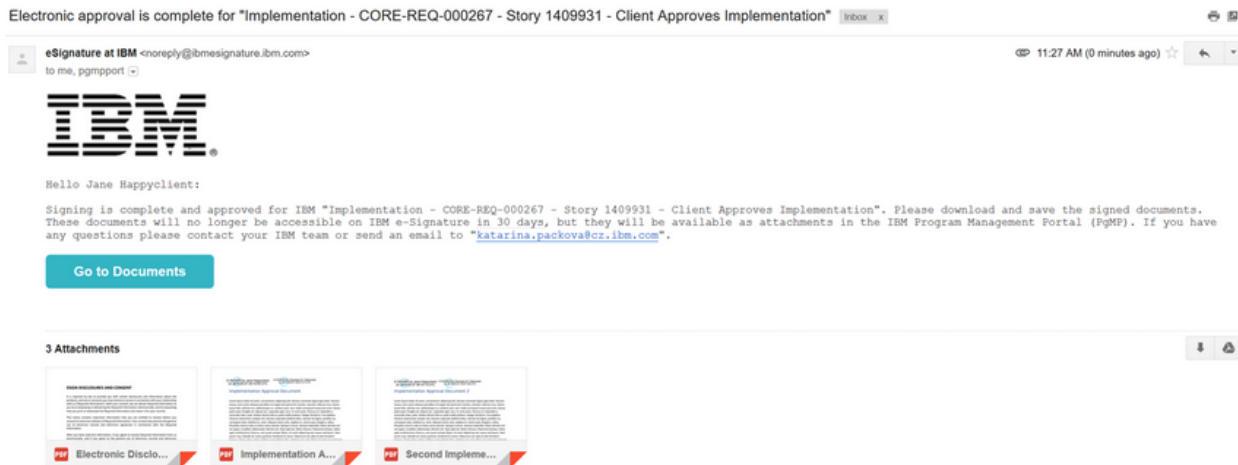


- If the Client user decides to decline the implementation they will be presented with the following overlay offering them single option to Decline the package and request the rework of the implementation.

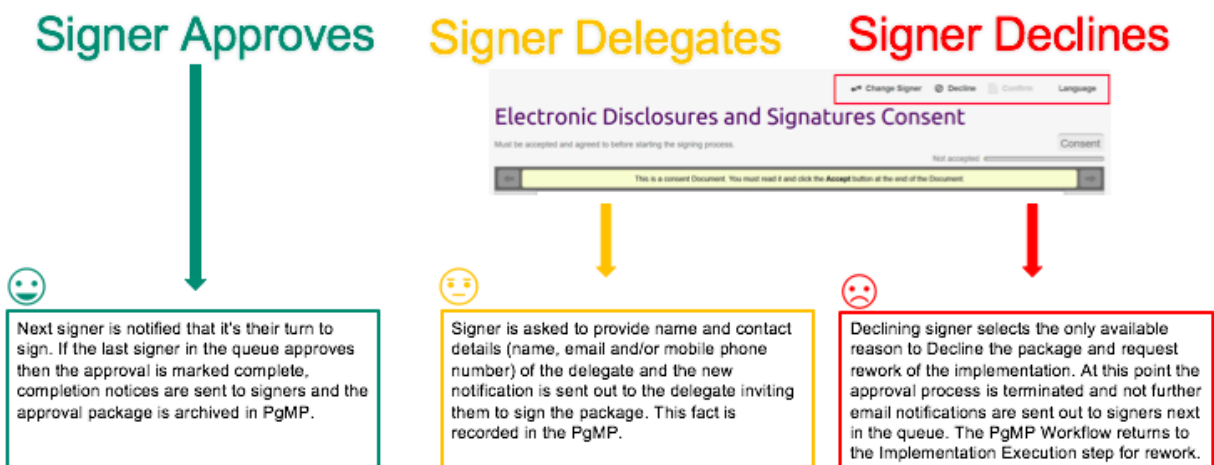


What happens when all signers approve?

- Once Client and IBM approve the package all signers will be sent a completion notification email with the copies of the consent forms and approval documents attached.
- Completion notification email sent to Client user is shown in the below screenshot.



Signers can Approve, Delegate Approval*, or Decline the Package



*Note: *Clients can delegate only if this option has been enabled by IBM*

- Once the implementation approval package is approved it will be archived and uploaded to the record's attachments where it can be accessed
- The current status for Client users will be then set to Closure.

Request for Service REQ-000071

Title:	eSig for reviewers
Contract:	Test - Krishna Murthy - Testing Account
Current step:	Closure
Current status:	The package was approved using IBM eSignature.
Assigned to:	Nanjundappa, Krishna M.

12.5. PgMP Catalog – Create Hyperlink from “Service Product” for displaying more detailed information of an Item

As part of ongoing effort to make better experience with PgMP catalog functionality, In PgMP 18.3 release, there will be few enhancements in the PgMP Catalog Request Page to improve user experience.

- **Service Product** text will function as a hyperlink to display more information related to particular catalog item. An overlay window will pop-up on clicking individual service product.
- This will enable users to view product details without leaving catalog list page or clicking "Add Item".

The screenshot displays a table of service products with columns for Catalog, Category, Sub-category, Service Product, and Product Code. A red box highlights the 'Service Product' column for the first row, which is linked to a detailed view overlay window titled 'Select service product'.

Catalog	Category	Sub-category	Service Product	Product Code
Global Offerings	Business Resiliency Services	Consulting Services	IBM Cloud Resiliency Orchestration Consulting Services: Orchestration Readiness Assessment	IBMGO-BRS01
Global Offerings	Business Resiliency Services	Implementation Services	Resiliency orchestration software implementation services	IBMGO-BRS02

Select service product

Catalog: Global Offerings
Catalog Code: IBMGO-1234
Category: Business Resiliency Services
Sub-category: Consulting Services
Service Product: IBM Cloud Resiliency Orchestration Consulting Services: Orchestration Readiness Assessment
Service Product Code: IBMGO-BRS01
Description: Resiliency Orchestration Readiness Assessment D examines the ten key focus areas essential to DR orchestration and determines the level of readiness required to migrate to orchestrated resiliency
Service Product URL: <https://www.ibm.com/us-en/marketplace/business-continuity-assessment>
Estimated Delivery Lead Time: 1 to 2 Weeks
Cancel

12.6. PgMP Catalog - Open Service Product URL in new Browser Tab

- **Service Product URL** will open in new Browser Tab. This change is implemented to resolve inconvenience, if a Service Product contains external URL
- Previously external web-links opened in the same browser tab leaving PgMP page

Select service product	
Catalog:	Global Offerings
Catalog Code:	IBMGO-1234
Category:	Business Resiliency Services
Sub-category:	Consulting Services
Service Product:	IBM Cloud Resiliency Orchestration Consulting Services: Orchestration Readiness Assessment
Service Product Code:	IBMGO-BRS01
Description:	Resiliency Orchestration Readiness Assessment D examines the ten key focus areas essential to DR orchestration and determines the level of readiness required to migrate to orchestrated resiliency
Service Product URL:	https://www.ibm.com/us-en/marketplace/business-continuity-assessment
Estimated Delivery Lead Time:	1 to 2 Weeks

12.7. PgMP Catalog - Clarify Catalog item page for users by updating button text and instructional text

- Instructional text related to non-priced catalog item, "This catalog contains unpriced items. They are shown but cannot be selected." will be changed to "This catalog contains unpriced items. Your IBM account team will provide additional information and pricing, based on your requirements".
- This is a temporary measure for the text to be informative before a solution is implemented to make it possible to request "Non-Priced Catalog Item"

This catalog contains unpriced items. They are shown but cannot be selected.							
^ Catalog	Category	Sub-category	Service Product	Product Code	Price Type	Price	Action
This catalog contains unpriced items. Your IBM account team will provide additional information and pricing, based on your requirements.							
^ Catalog	Category	Sub-category	Service Product	Product Code	Price Type	Price	Action

Chapter 13. References

PgMP Education

[What's New in PgMP PPT](#)

PgMP Education Videos

There are 6 education modules that should be used in conjunction with this guide:

[PgMP Basic Overview for the Client](#)

[PgMP Advanced Overview for the Client](#)

[PgMP Request Management, PCRs and the Client](#)

[PgMP Contract Management and the Client](#)

[PgMP Catalog and the Client](#)

[PgMP Dashboard and the Client](#)

View or download the [PgMP Client Education Index](#) to find more information on the contents of each module

To watch a video module, click the link of the module listed above, that you would like to access. The zipped files will be downloaded to your computer. You can open them or save them to your hard drive. Open the .html file in your local browser to view the module.

If you have any questions or problems, please contact your IBM Account Focal Point.

Accessibility

IBM is committed to accessibility. The videos available through the links in the section above are closed-captioned. To further assist two additional files are available for each module:

- A copy of the Microsoft PowerPoint file used in each video can be obtained in the links below:
 - [PgMP Basic Overview for the Client PPT](#)
 - [PgMP Advanced Overview for the Client PPT](#)
 - [PgMP Request Management, PCRs and the Client PPT](#)
 - [PgMP Contract Management and the Client PPT](#)
 - [PgMP Catalog and the Client PPT](#)
 - [PgMP Dashboard and the Client PPT](#)

END OF DOCUMENT. PgMP Client User Guide