

IBM Rational Portfolio Manager

Post-Installation Guide

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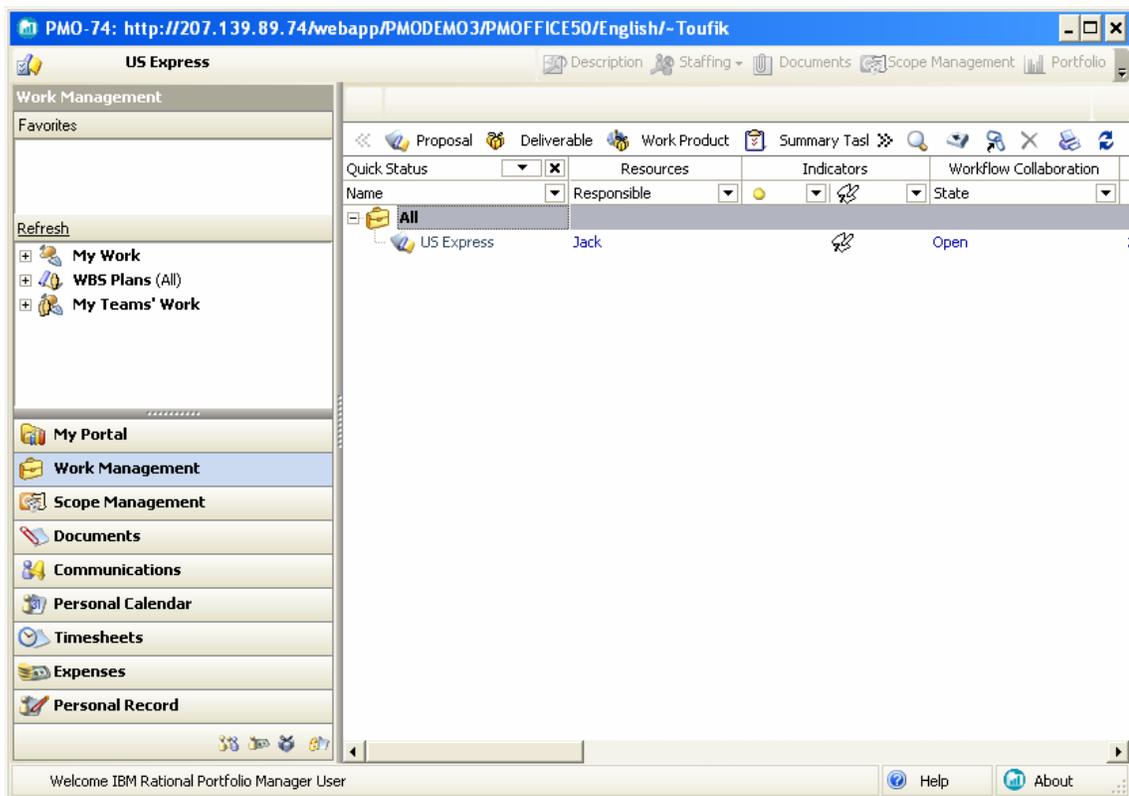
Introduction

As a part of the post-installation procedure and in order to optimize and configure your Rational Portfolio client, you might need to install some default settings:

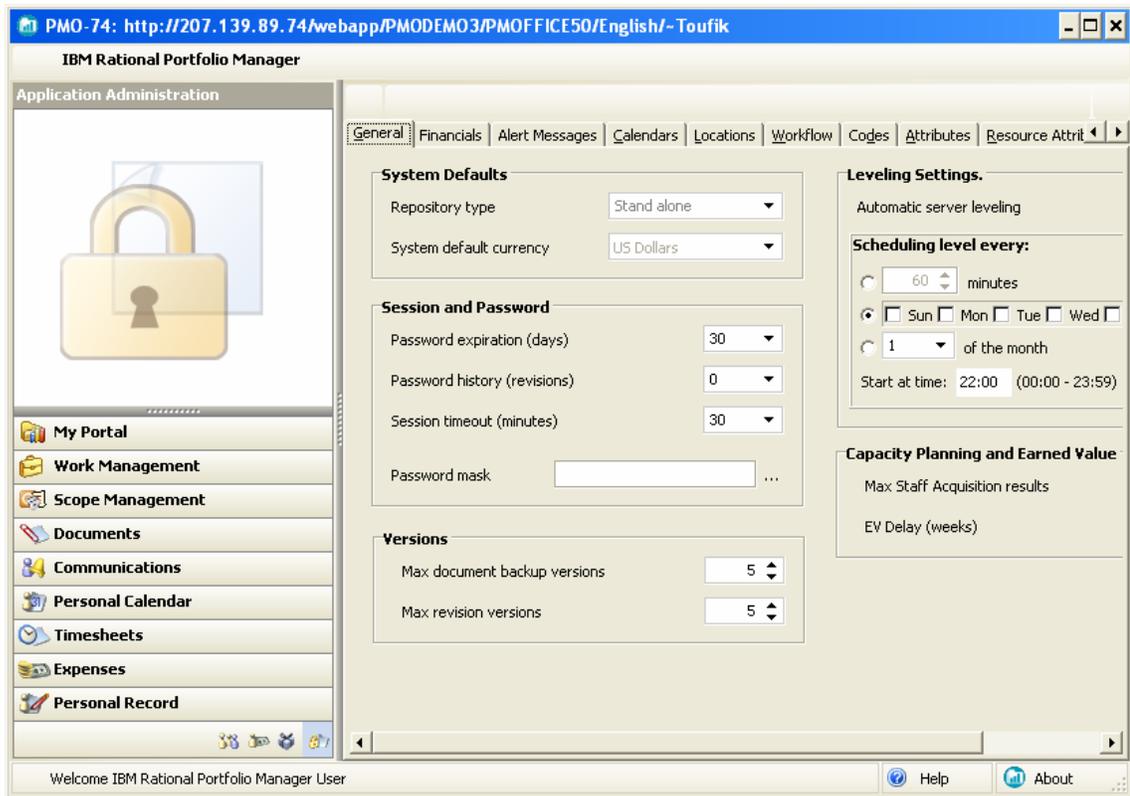
- Layout
- Pivots
- Reports
- MLD

Layout Settings

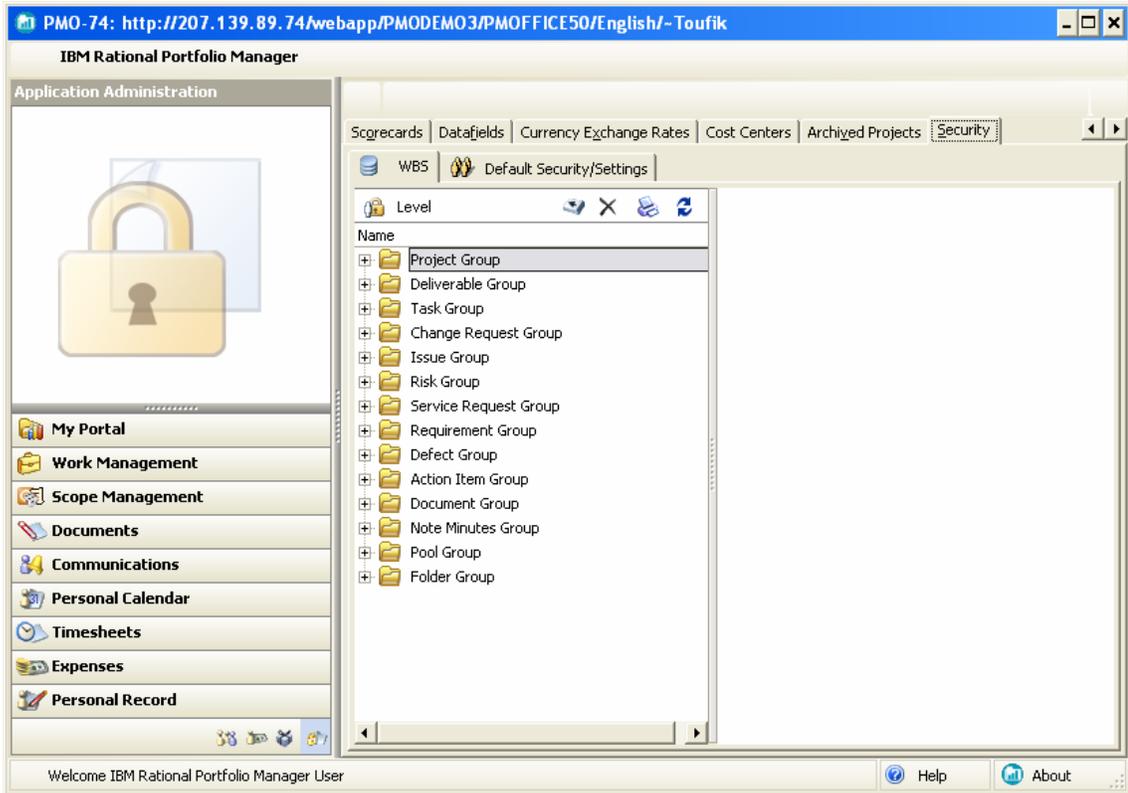
1. Logon to Rational Portfolio Manager



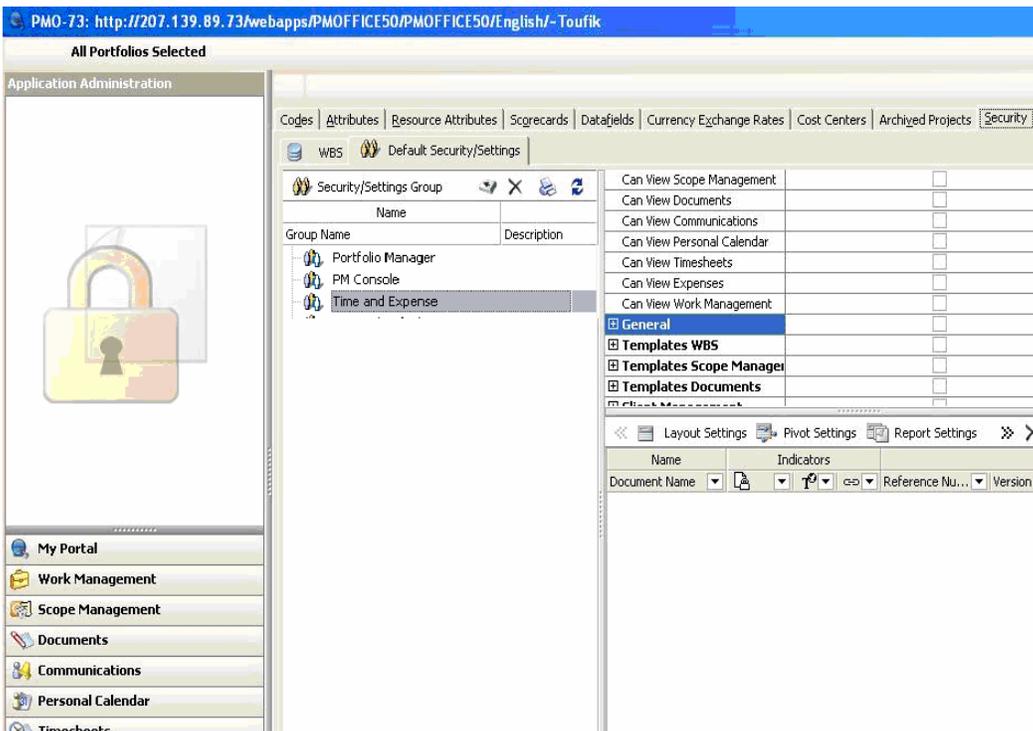
2. Open the  **Application Administration View**



3. Select the Security Tab



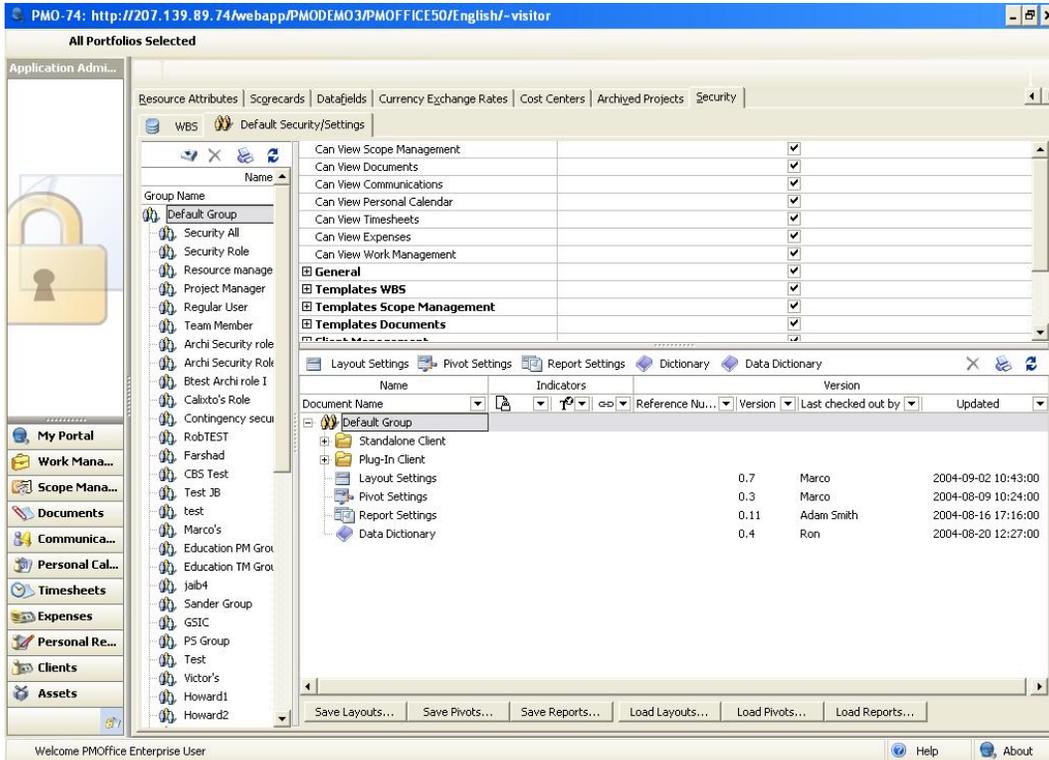
4. Select the Default Security/Settings Sub-Tab



3 Groups are added by Default:

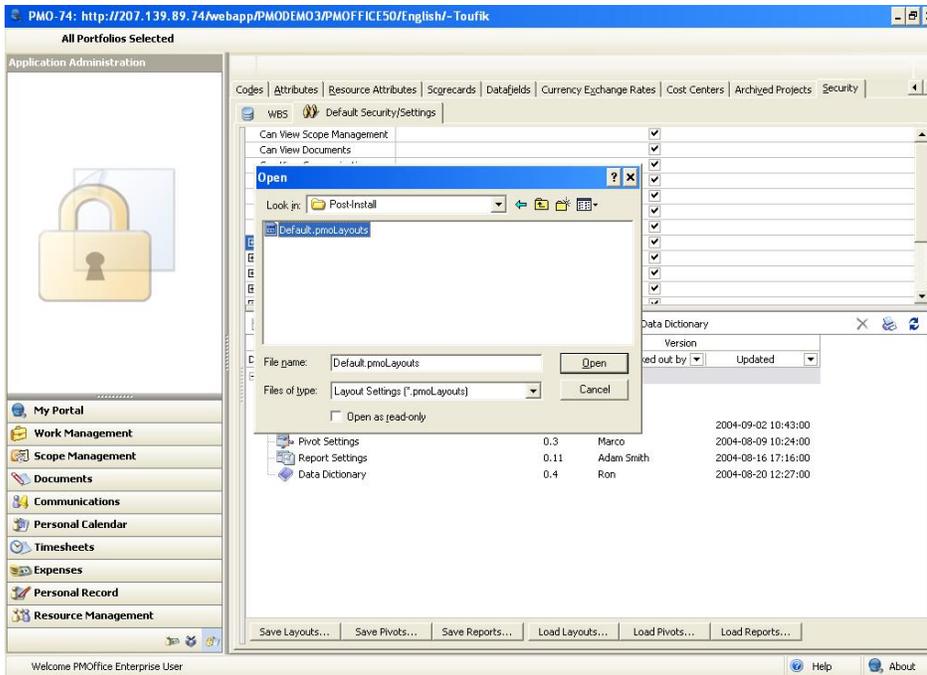
- Portfolio Manager
- PM Console
- Time & Expenses

5. Choose one of the group, at bottom of the right pane select the client type.



6. In the lower right frame, click on Load Layout button.

7. Browse to the Post-Install folder to upload the predefined settings file.



8. In the open dialog, select the file and then click Open

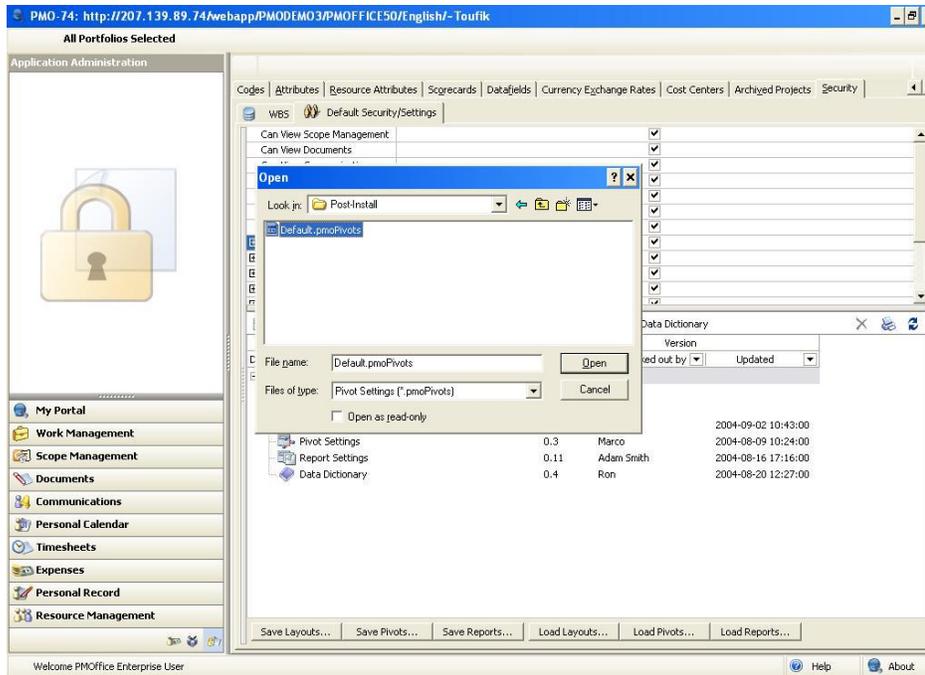
9. Click OK, this will upload the Layout.

Pivot Settings

Proceed with steps 1 to 5

10. In the lower right frame, click on Load Pivots button.

11. Browse to the Post-Install folder to upload the predefined settings file.



12. In the open dialog, select the file and then click Open

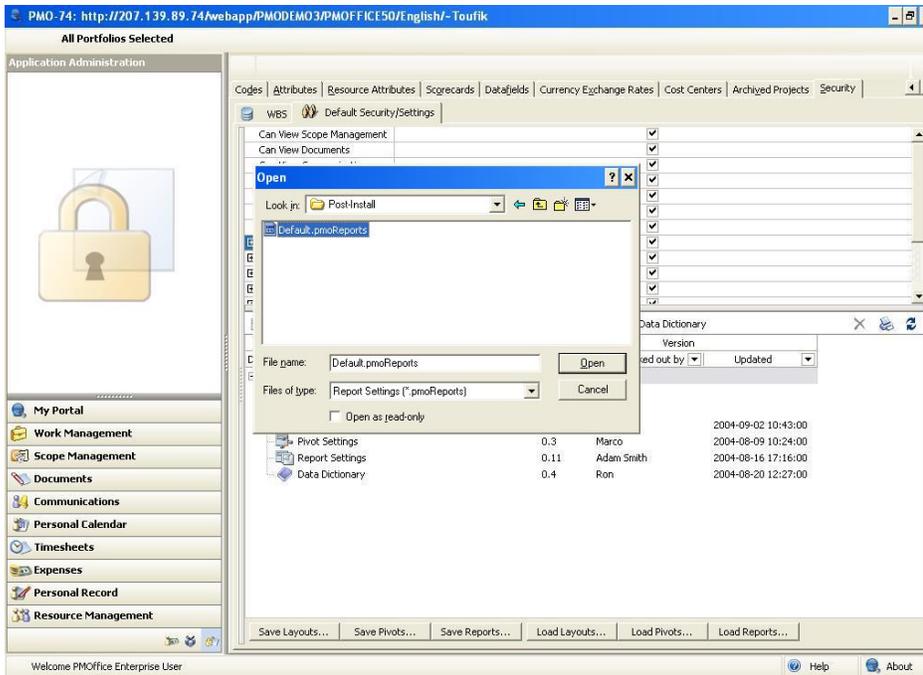
13. Click OK and this will upload the Pivots.

Report Settings

Proceed with steps 1 to 5

14. In the lower right frame, click on Load Reports button.

15. Browse to the Post-Install folder to upload the predefined settings file.



16. In the open dialog, select the file and then click Open

17. Click OK in the Layout check in dialog