



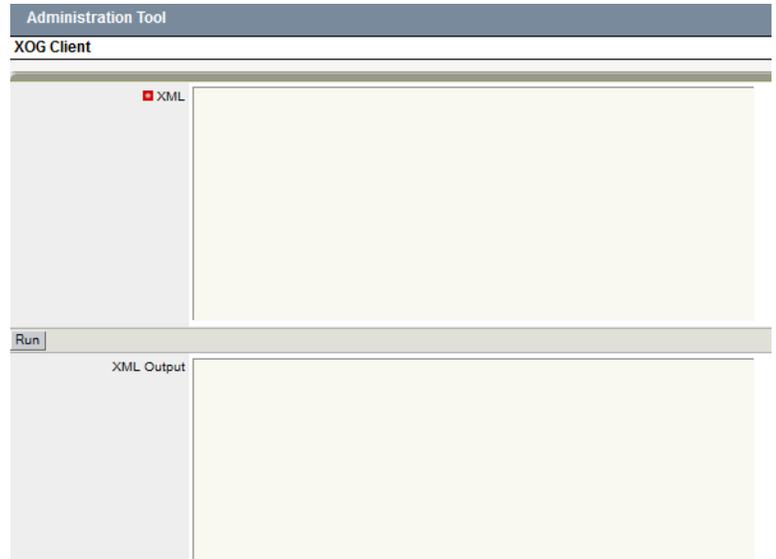
Portlet Export / Import Guidelines

The purpose of this guide is to provide assistance in exporting and importing portlets utilizing the Clarity PPM xog client. It is assumed that you already are familiar with .xml and as a pre-requisite you will need administrative rights to perform the import and export functions.

Accessing the XOG Client

The xog client can be accessed from within Clarity via the URL. Login to you Clarity system and within the URL you will see something similar to the following:
<http://clarity.regoconsulting.com/niku/app?action=npt.overview> .

To access the xog client replace everything to the right of the '=' sign with the following:
xog.client The URL will look similar to the following:
<http://clarity.regoconsulting.com/niku/app?action=xog.client>



Exporting Portlets

The XML to the right is to be used as a template to export (xog out) portlets. Copy and paste the Portlet Read xml template from the right into the top portion of the XOG client. Replace the xogHelloWorld with the Portlet ID that you are exporting.

```
<?xml version="1.0" encoding="UTF-8"?>
<NikuDataBus xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="../xsd/nikuxog_read.xsd">
  <Header version="8.0" action="read" objectType="contentPack"
externalSource="NIKU">
    <!-- you change the order by simply swap 1 and 2 number in
the name attribute -->
    <args name="order_by_1" value="code"/>
    <args name="documentLocation" value="C:\niku"/>
  </Header>
  <PortletQuery>
    <Filter name="code" criteria="EQUALS"> xogHelloWorld
  </Filter>
</PortletQuery>
</NikuDataBus>
```

The Portlet ID can be found from the Administration Tool in the Portlets listing as shown below.

Portlet	ID	Category	Type	Instance Type	Active	Description	Date Created	Creator
Actuals by Transaction Type	cop.prjTrxTypeHierarchy	Productivity	Grid	Project	✓	Actuals by Transaction Type	11/19/10 12:02 AM	Administrator, Niku
Alerts	cop.dashboardProjectAlerts	Business Intelligence	Grid	Project	✓	Alerts	11/19/10 12:01 AM	Administrator, Niku
Earned Value Phase Analysis	cop.prjEarnedValuePhaseAnalysis	Productivity	Grid	Project	✓	Earned Value Phase Analysis	11/19/10 12:00 AM	Administrator, Niku
General	project.General	Project	Restricted Project	Project	✓	General information for a project	7/26/04 5:32 PM	Administrator, Niku
Labor Effort	project.Effort	Project	Restricted Project	Project	✓	Labor Resource Effort for a project	7/26/04 5:32 PM	Administrator, Niku
Links	project.Links	Project	Restricted Project	Project	✓	Links defined for a project	7/26/04 5:32 PM	Administrator, Niku
Project Baselines	cop.dashboardProjectBaselines	Productivity	Graph	Project	✓	Project Baselines	11/19/10 12:02 AM	Administrator, Niku
Subprojects	project.Subprojects	Project	Restricted Project	Project	✓	Subprojects for a project	7/26/04 5:32 PM	Administrator, Niku

The XOG client will look like the following once you have pasted the Portlet Read xml into the top XML section: (Remember to replace the portlet id with the desired portlet id that you are exporting)

XOG Client

```
<?xml version="1.0" encoding="UTF-8"?>
<NikuDataBus xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:nc
<Header version="8.0" action="read" objectType="contentPack" externalS
<!-- you change the order by simply swap 1 and 2 number in the name s
<args name="order_by_1" value="code"/>
<args name="documentLocation" value="C:\niku"/>
</Header>
<PortletQuery>
  <Filter name="code" criteria="EQUALS" reqo_portlet_id/>
</PortletQuery>
</NikuDataBus>
```

Run

Press the Run button to execute the export. When the export has been completed the output will be in XML format and will be displayed in the XML Output section of the XOG client as shown below:

Run

XML Output

```
<?xml version="1.0" encoding="UTF-8"?>
<NikuDataBus xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:nc
<Header action="write" externalSource="NIKU"
  objectType="contentPack" version="12.1.0.5849"/>
<contentPack update="true">
  <portlets update="true">
    <gridPortlet allowConfigure="true"
      allowConfigureLabel="true" allowEditing="false"
      category="businessIntelligence"
      code="reqo_all_assignments"
      dataProviderId="reqo_all_assignments"
      dataProviderPartitionId="NIKU.ROOT"
      dataProviderType="naql" defaultSortColumn="project_nam
      defaultSortOrder="ascending" forceFilter="false"
      gridAttributeProtection="1" hasEditableColumn="false"
      metricsLocation="bottom" objectType="SYSTEM"
      querySource="customer" showAltValueText="false"
      showColumnCurrencyCode="false" source="customer">
      <nls languageCode="zh" name="All Assignments"/>
      <nls languageCode="da" name="All Assignments"/>
      <nls languageCode="it" name="All Assignments"/>
      <nls languageCode="no" name="All Assignments"/>
      <nls languageCode="ko" name="All Assignments"/>
      <nls languageCode="cs" name="All Assignments"/>
      <nls languageCode="de" name="All Assignments"/>
      <nls languageCode="fi" name="All Assignments"/>
      <nls languageCode="zh_TW" name="All Assignments"/>
      <nls languageCode="pt" name="All Assignments"/>
      <nls languageCode="sv" name="All Assignments"/>
      <nls languageCode="fr" name="All Assignments"/>
```

The output xml will include the portlet configuration, the source query, needed lookups and any other related to the portlet configuration.

Saving The Exported Portlet

Copy the output xml to its own document and save it as one of the following file formats (.xml, .rtf, .txt or .doc).

The document name should contain the name of the portlet and the version (i.e. myPortletName_v12.txt)

This file can now be uploaded, along with the submission form, to regoXchange.