HP Project and Portfolio Management Center Version 8.00

Patch Release Notes for upgrade bundle for upgrading PPM Center from version 7.5 or 7.5 SPs 1~7 to version 8.00

Software version: 8.00 / November 2012

Introduction

This patch is intended to prepare data and remove invalid data from the Financial Management module before upgrading PPM Center from version 7.5 or 7.5 SPs 1~7 to version 8.00, and to fix inconsistent data produced in the Financial Management module during the upgrade. The patch comprises scripts that shall be run before and after running the upgrade bundle. In addition, issues that may occur after upgrading PPM Center to version 8.00 or later without applying this patch are also documented in this patch release notes.

Notes:

- This patch is required if you use the Financial Management module; optional if you do not use the Financial Management module.

- This patch is not applicable if you have already upgraded your PPM Center to version 8.00 or later.

Installation Notes

To ensure successful installation of the upgrade bundle for upgrading PPM Center from version 7.5 or 7.5 SPs 1~7 to version 8.00,

1 Back up your database.

2 Stop the PPM server.

3 Copy the patch file `fm-upgrade-750-800-patch.zip` to the `<PPM_Home>` directory. This is the directory where the PPM Server is installed.

4 Unzip the patch file in the directory.

5 Run the following script to prepare PPM Center version 7.5 or 7.5 SPs 1~7 data for upgrading purpose:

— On Unix system, run: **`sh ./run-pre.sh`**

— On Windows system, run: **`sh ./run-pre.bat`**

6 Install the upgrade bundle for upgrading PPM Center from version 7.5 or 7.5 SPs 1~7 to version 8.00.

For detailed instructions, see the *Upgrade Guide* for PPM Center version 8.00.

7 After the upgrade is completed, run the following script:

— On Unix, run: **`sh ./run-post.sh`**

— On Windows, run: **`sh ./run-post.bat`**

Fixes

The following issues are fixed in the patch for the upgrade bundle for upgrading PPM Center from version 7.5 or 7.5 SPs 1~7 to version 8.00:

Tracking Number	Problem
4632377145	Dirty data in PPM Center version 7.5 or 7.5 SPs 1~7 interrupts the running of the upgrade bundle. (QCCR1L49032)
N/A	Editable data of program financial summaries are invisible to users after upgrading PPM Center to version 8.00. (QCCR1L49025)
4634660550	Editable data of program financial summaries are not correctly calculated. (QCCR1L49034, QCCR1L49023)
N/A	Project health is not correctly calculated or tracked. (QCCR1L49024)

Dirty data in PPM Center version 7.5 or 7.5 SPs 1~7 interrupts the running of the upgrade bundle

When running the upgrade bundle, dirty data in PPM Center version 7.5 or 7.5 SPs 1~7 may interrupt the process. This patch cleans these dirty data before running the upgrade bundle.

Editable data of program financial summaries are invisible to users after upgrading PPM Center to version 8.00

In PPM Center version 7.5 or 7.5 SPs 1~7, program financial summaries display only one type of data. After upgrading PPM Center to version 8.00, program financial summaries data are divided into two types: roll-up data and editable data. In PPM Center version 8.00, the editable data are, by default, invisible to users. This patch automatically enables the editable data of financial summaries for programs that are upgraded from PPM Center version 7.5 or 7.5 SPs 1~7, so that you can have access to all the data of program financial summaries.

For details about roll-up data and editable data, see the *Financial Summaries of Programs* section of the *HP Financial Management User's Guide* for the PPM Center version 8.00.

Editable data of program financial summaries are not correctly calculated

Editable data of program financial summaries may not be correctly calculated after upgrading PPM Center to version 8.00. This patch resolves this issue by recalculating the editable data.

Project health is not correctly calculated or tracked

In PPM Center version 8.00, plan of record is a factor that calculates project health, while in PPM Center version 7.5 (or 7.5 SPs 1~7), plan of record does not exist and project health is tracked according to budget. Therefore, health of projects that are upgraded from PPM Center version 7.5 (or 7.5 SPs 1~7) may not be correctly calculated or tracked in PPM Center version 8.00.

To track project health properly, recalculation of project health is required after the upgrade is completed. This patch sets up plans of records for the projects upgraded from PPM Center version 7.5 (or 7.5 SPs 1~7) by creating financial summary snapshots from project budgets. With the plans of records prepared, the Cost Rollup Service will automatically recalculate project health.

You can also recalculate project health by manually saving project settings.

Note: Project health is the weighted average of schedule health, issue health, and cost health. The Cost Rollup Service can only calculate one of them at a time. To calculate another one, you may have to use the Cost Rollup Service again by running the `sh. /run-post.sh` script.

Workarounds for Issues You May Encounter after Upgrading PPM Center to Version 8.00 or Later Without Applying the Patch

This patch release notes also describes three issues that you may encounter after upgrading PPM Center to version 8.00 or 9.10 if this patch was not applied before the upgrade as well as the workarounds (if available).

- Programs that are created in PPM Center version 8.00 do not display editable data in their financial summaries in version 9.10.

  If you want these program financial summaries to display editable data for users, as PPM server administrator, you should do the following when PPM server is down:

  1 Set the new `server.conf` parameter `com.kintana.core.server.ENABLE_PROGRAM_EDITABLE_FS` to **true**.

  2 Change to the `<PPM_Home>`/bin directory.

  3 Run the following command: **sh ./kUpdateHtml.sh**.

- Forecast and actual costs are doubled in program financial summaries in PPM Center version 9.10.

  It may occur in the following two scenarios:

  o In PPM Center version 7.5 (or 7.5 SPs 1~7), users manually input forecast and actual costs of program financial summaries which they get by summing up the total costs of projects that belong to the programs.

  o In PPM Center version 8.00, users manually input the total costs of programs upgraded from PPM Center version 7.5 (or 7.5 SPs 1~7) as the editable data of program financial summaries.

- In PPM Center version 8.00, if plan of record does not exist for a project financial summary, project health may not be calculated correctly.

If you encounter the first issue, you can follow the provided steps to address it; and if you encounter the last two issues, contact HP Software Support.