HPE Project and Portfolio Management Center

Software Version: 9.41

Release Notes

Hewlett Packard Enterprise

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Contents

Chapter 1: Overview

This document is an overview of the changes made to Project and Portfolio Management Center (PPM Center) for version 9.41. It contains important information that is not included in the manuals. You can find information about the following in this document:

- "Installation Notes" on page 7
- "New Features in PPM 9.41" on page 11
- "Enhancements, Certifications, and Fixes in PPM 9.41" on page 31
- "Known Problems and Limitations in PPM 9.41" on page 58
- "Documentation Errata" on page 60
- "Deprecation"

Software and Hardware Requirements

For information about the installation requirements and compatibility with other products, see the *System Requirements and Compatibility Matrix* for PPM version 9.41. The support matrix may be updated between releases, and so is only available at the HP Support web site:

https://softwaresupport.hpe.com

Protecting Your Deployment from Security Vulnerabilities

Make sure you take necessary precautions to protect your PPM deployment from general security vulnerabilities, especially those related to Web server and related infrastructure vulnerabilities. Patch and configure your Web server's operating system and DNX servers to prevent malicious attacks that could put your organization and data at risk. You can take such steps as disabling unused ports or enabling SSL in your environment. Consult your Web server vendor for the latest patches to prevent harmful attacks such as cross-site scripting.

Chapter 2: Installation Notes

Note: The zip package of PPM Center version 9.41 contains two files:

- `ppm-941-SP1.jar`, the installation jar file for PPM Center version 9.41. The installation instructions are provided in "Installing PPM 9.41" below.

- `ppm-941-LP-multi-lang.jar`, language packs installation jar file for PPM Center version 9.41. Required only when you want to install a language pack.

  Instructions for installing language packs are provided in the *Release Notes for Language Pack* for PPM 9.41, available at the https://softwaresupport.hpe.com.

Installing PPM 9.41

Note:

- PPM 9.40 or later is required before you upgrade PPM to 9.41.
- PPM recommends you back up your customized files including scripts before applying PPM version 9.41.

To install PPM version 9.41:

1. Back up your database.
2. Back up your customized data.
3. Stop the PPM Server. The Service Pack cannot be installed on an active server.
4. Copy the Service Pack file `ppm-941-SP1.jar` to the *<PPM_Home>* directory. This is the directory where the PPM Server is installed.
5. Change to the *<PPM_Home>*`/bin` directory.
6. Start the installation using the following command:

   `sh ./kDeploy.sh -i SP1`
7. Follow the on-screen instructions to complete the installation.
8. Restore your customized data (if any).
9. Start the PPM Server.

Out-of-Sync Actuals Data

The following sections describe what to do if the pre-validation process during installation determines that data is not synchronized between the Time Management and Project Management modules or between the Time Management and Demand Management modules.

Data Out of Sync Between Time Management and Demand Management

If, during the installation of PPM 9.41, the pre-validation process determines that actuals data in the Time Management and Demand Management modules are out of sync, an error occurs and you cannot continue with the installation.

To resolve the problem:

1. Navigate to the *<PPM_Home>*`/deploy/941/SP1/phases/prevalidation` directory and run the `CorrectDMTMActualsOutOfSync.sql` script.

2. After the `CorrectDMTMActualsOutOfSync.sql` script has run successfully, re-install PPM 9.41.

Data Out of Sync Between Time Management and Project Management

If, during the installation of PPM 9.41, the pre-validation process determines that actuals data in the Time Management and Project Management modules are out of sync, an error occurs and you cannot continue with the installation.

To resolve the problem:

1. To tag these data for synchronization, navigate to the *<PPM_Home>*`/deploy/941/SP1/phases/prevalidation` directory and run the `MarkPMTMActualsOutOfSync.sql` script.

2. Re-deploy PPM 9.41.

3. After you successfully install PPM 9.41, navigate to the *<PPM_Home>*`/bin` directory and run the `kPMTMSync.sh` script, as follows, and redirect the output to a file:
   `sh ./kPMTMSync.sh -username`*<username>* `-password` *<password>*

Supported Upgrades

Note: HP strongly recommends upgrading to the latest version of PPM. In general, each new PPM version includes important product improvements that are not provided in earlier versions.

Table 1-1 Supported upgrades for current PPM Center versions

Current PPM Version	Can be upgraded to				
	8.0x	**9.1x**	**9.2x**	**9.3x**	**9.4x**
7.5 SP3 or earlier [1]	8.00 or later	9.10 or later	9.20~9.22	9.30~9.32	9.40~9.41
7.5 SP4, 7.5 SP5, 7.5 SP6 [1]	8.02 or later	9.10 or later	9.20~9.22	9.30~9.32	9.40~9.41

Table 1-1 Supported upgrades for current PPM Center versions, continued

Current PPM Version	Can be upgraded to				
	8.0x	**9.1x**	**9.2x**	**9.3x**	**9.4x**
7.5 SP7 [1]	8.03 or later	**9.12** or later	9.20~9.22	9.30~9.32	9.40~9.41
8.00 [2]	8.00.01 or later	9.10 or later	9.20~9.22	9.30~9.32	9.40~9.41
8.00.01 [2]	8.02 or later	9.10 or later	9.20~9.22	9.30~9.32	9.40~9.41
8.02 [2]	8.03 or later	9.10 or later	9.20~9.22	9.30~9.32	9.40~9.41
8.03 [2] (build 1189 and build 1208)	8.04	**9.12** or later	9.20~9.22	9.30~9.32	9.40~9.41
8.04	—	**9.14 (build 1460)**	9.20~9.22	9.30~9.32	9.40~9.41
9.10	—	9.11 or later	9.20~9.22	9.30~9.32	9.40~9.41
9.11	—	9.12 or later	9.20~9.22	9.30~9.32	9.40~9.41
9.12	—	9.13 or later	9.20~9.22	9.30~9.32	9.40~9.41
9.13	—	**9.14 (build 1460)**	9.20~9.22	9.30~9.32	9.40~9.41
9.14 (build 1435 or build 1460)	—	—	9.20~9.22	9.30~9.32	9.40~9.41
9.14.0001~9.14.0004 [3]	—	—	9.20~9.22	9.30~9.32	9.40~9.41
9.14.0005~9.14.0006 [3]	—	—	9.21, 9.22	9.30~9.32	9.40~9.41
9.14.0007~9.14.0009 [3]	—	—	9.22	9.30~9.32	9.40~9.41
9.20	—	—	9.21, 9.22	9.30~9.32	9.40~9.41
9.21	—	—	9.22	9.30~9.32	9.40~9.41
9.22	—	—	—	9.30~9.32	9.40~9.41
9.22.0001~9.22.0005 [4]	—	—	—	9.30~9.32	9.40~9.41
9.30	—	—	—	9.31, 9.32	9.40~9.41
9.30.0001	—	—	—	9.31, 9.32	9.40~9.41

Table 1-1 Supported upgrades for current PPM Center versions, continued

Current PPM Version	Can be upgraded to				
	8.0x	9.1x	9.2x	9.3x	9.4x
9.31	—	—	—	9.32	9.40~9.41
9.31.0001	—	—	—	9.32	9.40~9.41
9.31.0002	—	—	—	9.32	9.40~9.41
9.40	—	—	—	—	9.41

1. If you are upgrading from a version prior to version 8.00, incremental upgrades are necessary (for example: version 7.5 to 8.00, followed by 8.00 to 9.10, 9.10 to 9.20, 9.20 to 9.30, and finally 9.30 to 9.31).

2. If you are upgrading from version 8.0x to 9.1x, you must initially upgrade to version 9.10 before upgrading to version 9.1x.

   For example, PPM versions 9.10 and 9.11 were released before versions 8.03 and 9.12. Versions 8.03 and 9.12 include improvements to core functionalities that are not supported on the older versions 9.10 and 9.11.

   If PPM is running at version 8.03, do not upgrade to and then run at version 9.10, 9.11, or 9.12. Instead, upgrade from version 8.03 to version 9.10 temporarily without running PPM Center, and then upgrade **immediately** to version 9.12 or later.

3. Defect fixes included in patches (up until 9.14.0004) on top of version 9.14 are rolled into version 9.20. Version 9.21 contains defect fixes included in patches 9.14.0001~9.14.0006. Version 9.22 contains defect fixes included in patches 9.14.0001~9.14.0009. Version 9.22.0001 contains defect fixes included in patches 9.14.0001 through 9.14.0010.

   If PPM is running at patch 9.14.0005 (or later, up until 9.14.0009), do not upgrade to and then run at version 9.20 or 9.21. Instead, upgrade from patch 9.14.0005 (or later, up until 9.14.0009) to version 9.20 temporarily without running PPM Center, and then upgrade **immediately** to version 9.22.

   If PPM is running at patch 9.14.0010 or later patch on top of version 9.14, do not upgrade to version 9.22 yet, otherwise you may encounter some regression regarding the defect fixes in 9.14.0010. Instead, upgrade from patch 9.14.0010 to version 9.22 temporarily without running PPM, and then upgrade **immediately** to version 9.22.0001 or the latest patch.

4. Defect fixes included in patches (up until 9.22.0004) on top of version 9.22 are rolled into version 9.31. Version 9.32 contains defect fixes included in 9.22.0001~9.22.0006.

   If you are on PPM Center patch 9.22.0005 (or later), do not upgrade to PPM Center version 9.30 or 9.31 yet, otherwise, you may encounter some regressions regarding the defect fixes included in 9.22.0005. Instead, upgrade from patch 9.22.0005 (or later) to version 9.30 temporarily without running PPM, and then upgrade **immediately** to version 9.32.

Chapter 3: New Features in PPM 9.41

PPM 9.41 includes the following new features:

- "Managing Budget with Different Budgeting Strategies"
- "Using MPP files for MSP-PPM Integration"
- "Integration with More Agile Development Tools"
- "Using Dashboard Page Filters"

Managing Budget with Different Budgeting Strategies

Previously, PPM has only one type of budgeting in Program Management, bottom-up budgeting, that attempts to determine the budget of each program content (project, proposal, and assets) and then total up each content in the program level.

To give program managers flexibility in budget management, PPM introduces another type of budgeting, top-down budgeting, that works in contrast to bottom-up budgeting. Using top-down budgeting strategy, program managers determine the budget of a program and then distribute the budget among the program content.

The following table describes how PPM manages budget with different budgeting strategies.

Budgeting strategy	How budget is managed
Top-down budgeting	1. Program managers estimate the cost that can cover the program and its content, and update the budget for the program. 2. Program managers estimate the cost of each program content, and allocate program budget to the program content. 3. If allowed by program managers, project (proposal or asset) managers can add budget for projects (proposals or assets) if, for example, they find the budget allocated from the program is not enough.
Bottom-up budgeting	1. Program managers estimate the cost of the program, and update the budget for the program. 2. Project (proposal or asset) managers estimate the cost of the projects (proposals or assets), and update the budget for the projects (proposals or assets). 3. PPM rolls up the budget of projects, proposals, and assets to the program.

After deciding the budgeting strategy, as described in "Choosing budgeting strategy", you can manage program and project/proposal/asset budget as follows:

- "(Top-down budgeting) Viewing, updating, and allocating program budget"
- "(Top-down budgeting) Viewing and updating project/proposal/asset budget"
- "(Bottom-up budgeting) Viewing and updating program budget"
- "(Bottom-up budgeting) Viewing and updating project/proposal/asset budget"

Choosing budgeting strategy

Budgeting strategy is set per program. By default, PPM uses bottom-up budgeting.

1. Go to the Program Settings page.

2. In the Financial Summary policy, make sure the option **Enable Financial Management for this program** is selected.

3. Select **Top-down budgeting** or **Bottom-up budgeting** based on your business needs.

If the option **Allow adding budget in the proposal, project, and asset level** is selected, project (proposal or asset) managers can add budget for projects (proposals or assets) if, for example, they find the budget allocated from the program is not enough.

If this option is not selected, projects, proposals, or assets can get budget only from the program.

4. Click **Save** or **Done**.

(Top-down budgeting) Viewing, updating, and allocating program budget

In top-down budgeting strategy, you may want to add budget for a program, check the budget for previous fiscal years for references, and allocate program budget to its content. All these actions can be done in Budget Details page for the program.

Viewing program budget

- To view budget totals of all fiscal years, check the data in the top rectangle.

   Total Self-Funded Budget is the total budget added in the program level.

   Total Allocations is the budget allocated to the program content.

   Total Available is the budget left.

   Total Self-Funded Budget = Total Available + Total Allocations

- To view details of budget added in the program level for a specific fiscal year, select the year in the **Fiscal Year** filter. The Self-Funded Budget section refreshes to display the budget added for the program in that year.

- To view details of budget allocated to any program content for a specific year, select the year in the **Fiscal Year** filter. Go to the Allocations section and check the Allocated Amount column for the program content. To see allocation history, click the information icon (ⓘ).

- To view details of self-funded budget and program allocations for all fiscal years, select **View All** in the **Fiscal Year** filter.

> **Note:** When a program uses top-down budgeting strategy, the budget details page accessed through snapshots of the program financial summary do not include program allocations information.

Updating program budget

1. Click **Update Budget** in the Self-Funded Budget section.

2. Complete all required fields in the Update Budget window.

> **Note:** If the parameters BUDGET_IN_WHOLE_DOLLARS and BUDGET_IN_THOUSAND_SHOW_DECIMAL are both set to false, you cannot enter decimals in the **Amount** field. That is, you can only add or subtract funding by integral multiple of 1000.

3. Click **Done**.

Allocating program budget

1. In the Allocations section, select a program content to which you want to allocate budget.

2. Click **Allocate Budget**.

3. Complete all required fields in the Allocate Budget window.

    Be aware of the available budget per fiscal year. You cannot allocate more than the budget limit.

> **Note:** If the parameters BUDGET_IN_WHOLE_DOLLARS and BUDGET_IN_THOUSAND_SHOW_DECIMAL are both set to false, you cannot enter decimals in the **Amount** field. That is, you can only allocate budget by integral multiple of 1000.

4. Click **Done**.

(Top-down budgeting) Viewing and updating project/proposal/asset budget

In top-down budgeting strategy, you may want to view the budget allocated from the program, and update budget for a project/proposal/asset if allowed by program managers. Both the actions can be done in Budget Details page for the project/proposal/asset.

Viewing project/proposal/asset budget

- To view budget totals of all fiscal years, check the data in the top rectangle.

    Total Self-Funded Budget is the total budget added in the project/proposal/asset level.

    Total Allocated Budget is the total budget allocated to the project/proposal/asset.

    Total Budget is the sum of total self-funded budget and total allocated budget.

- To view details of budget added in the project/proposal/asset level for a specific fiscal year, select the year in the **Fiscal Year** filter. The Self-Funded Budget section refreshes to display the budget added for the project/proposal/asset in that year.

- To view budget allocated from the program for a specific year, select the year in the **Fiscal Year** filter. Check the Allocated Budget section.

- To view details of self-funded budget or allocated budget for all fiscal years, select **View All** in the **Fiscal Year** filter.

Updating project/proposal/asset budget

You can update budget in the project/proposal/asset level only when program managers allow (when the option **Allow adding budget in the proposal, project, and asset level** is selected in Program Management).

1. Click **Update Budget** in the Self-Funded Budget section.

2. Complete all required fields in the Update Budget window.

> **Note:** If the parameters `BUDGET_IN_WHOLE_DOLLARS` and `BUDGET_IN_THOUSAND_SHOW_DECIMAL` are both set to `false`, you cannot enter decimals in the **Amount** field. That is, you can only add or subtract funding by integral multiple of 1000.

3. Click **Done**.

(Bottom-up budgeting) Viewing and updating program budget

In bottom-up budgeting, you may want to add budget for a program, check the budget for previous fiscal years for references, and view the budge of its content. All the actions can be done in Budget Details page for the program.

Viewing program budget

- To view budget totals of all fiscal years, check the data in the top rectangle.

  Total Self-Funded Budget is the total budget added in the program level.

  Total Rolled Up Budget is the total budget rolled up from the program content.

  Total Budget is the sum of total self-funded budget and total rolled up budget.

- To view details of budget added in the program level for a specific fiscal year, select the year in the **Fiscal Year** filter. The Self-Funded Budget section refreshes to display the budget added for the program in that year.

- To view details of budget rolled up from the program content for a specific year, select the year in the **Fiscal Year** filter. Check the Rolled Up Budget section.

- To view details of self-funded budget and rolled up budget for all fiscal years, select **View All** in the **Fiscal Year** filter.

Updating program budget

Updating program budget in both budgeting strategies are the same. See "Updating program budget" for details.

(Bottom-up budgeting) Viewing and updating project/proposal/asset budget

In bottom-up budgeting, you may want to add budget for a project/proposal/asset, and view the budget for previous fiscal years. Both the actions can be done in Budget Details page for project/proposal/asset.

Viewing project/proposal/asset budget

- To view budget totals of all fiscal years, check the data in the top rectangle.

  Total Self-Funded Budget is the total budget added in the project/proposal/asset level.

  Total Allocated Budget is the total budget allocated by the program. This data is only available if the project/proposal/asset is also added in another program that adopts top-budgeting and has allocated budget to the project/proposal/asset.

  Total Budget is the sum of total self-funded budget and total allocated budget.

- To view details of budget added in the project/proposal/asset level for a specific fiscal year, select the year in the **Fiscal Year** filter. The Self-Funded Budget section refreshes to display the budget added for the project/proposal/asset in that year.

- If the project/proposal/asset is also added in another program that adopts top-budgeting and has allocated budget to the project/proposal/asset, the Allocated Budget section is present. Select a year in the **Fiscal Year** filter to view budget allocated from the program for the year in the Allocated Budget section.

- To view details of self-funded budget or allocated budget for all fiscal years, select **View All** in the **Fiscal Year** filter.

Updating project/proposal/asset budget

Updating project/proposal/asset budget in both budgeting strategies are the same. See "Updating project/proposal/asset budget" for details.

If the project/proposal/asset is also added in another program that adopts top-budgeting and does not allow adding budget in the project/proposal/asset level, you cannot update budget for the project/proposal/asset.

Using MPP files for MSP-PPM Integration

Starting from 9.41, PPM supports using Microsoft Project files (MPP files) for the MSP-PPM integration. This feature lets you upload and download MPP file in PPM to synchronize the project work plan between PPM and Microsoft Project. With this approach available, you can choose to use either MPP files or the Microsoft Project plug-in to implement the MSP-PPM integration.

> **Note:** Compared with the Microsoft Project plug-in, using MPP files has the following advantages:
>
> - Linked tasks information can be updated to Microsoft Project when you download a work plan as an MPP file from PPM.
> - PPM external predecessors and external successors can be inserted in custom text fields of Microsoft Project when you download a work plan as an MPP file from PPM.
> - Microsoft Project baseline start, baseline finish, baseline duration, and baseline work can be updated to PPM task user data fields when you upload an MPP file to PPM.

Using MPP file for MSP-PPM integration involves the following tasks:

- "Enabling using MPP files for MSP-PPM integration" below
- "Deciding control mode" on page 19
- "Uploading MPP files to PPM" on page 20
- "Downloading work plans as MPP files" on page 21
- "Mapping resources" on page 21
- "Mapping PPM external predecessors and external successors" on page 23
- "Mapping MSP baseline data" on page 23
- "Limitation"

Enabling using MPP files for MSP-PPM integration

To enable using MPP files for MSP-PPM integration, set the parameter `ALLOWED_MSP_INTEGRATION_MODE` to `MPP_FILE` or `BOTH` (case insensitive) in the Administration Console.

The following table provides detailed usage of this parameter.

Parameter Name	Usage

ALLOWED_MSP_INTEGRATION_MODE	• When the parameter is set to `PLUGIN`, the Integration Mode section of the Microsoft Project Integration policy in Project Settings shows the Microsoft Project plug-in mode only.
	In this case, you can only use Microsoft project plug-in for the integration with Microsoft Project.

Integration Mode

Modifying control mode may cause work plan tasks to be deleted.

Choose the integration mode for the project work

You can import the PPM work plan in Microsoft Project.

Use Microsoft Project Plug-in for PPM

- ⦿ PPM controls all shared work plan information
- ○ Microsoft controls all shared work plan information
- ○ Control is shared
  - Work breakdown information is controlled by Microsoft
  - Actuals tracking information is controlled by PPM

• When the parameter is set to `MPP_FILE`, the Integration Mode section of the Microsoft Project Integration policy in Project Settings shows the MPP file mode only.

In this case, you can only use MPP file for the integration with Microsoft Project.

Integration Mode

Modifying control mode may cause work plan tasks to be deleted.

Choose the integration mode for the project work

You can download the PPM work plan as an MPP file.

Upload & Download MPP file from PPM

- ⦿ PPM controls all shared work plan information
- ○ Microsoft controls all shared work plan information
- ○ Control is shared
  - Work breakdown information is controlled by Microsoft
  - Actuals tracking information is controlled by PPM

• When the parameter is set to `BOTH`, the Integration Mode section of the Microsoft Project Integration policy in Project Settings shows both modes.

In this case, you can select to use either Microsoft Project plug-in or MPP file for the integration with Microsoft Project.

You cannot use both modes at the same time.

Integration Mode

Modifying control mode may cause work plan tasks to be deleted.

Choose the integration mode for the project work

You can download the PPM work plan as an MPP file.

Use Microsoft Project Plug-in for PPM

- ○ PPM controls all shared work plan information
- ○ Microsoft controls all shared work plan information
- ○ Control is shared
  - Work breakdown information is controlled by Microsoft
  - Actuals tracking information is controlled by PPM

Upload & Download MPP file from PPM

- ● PPM controls all shared work plan information
- ○ Microsoft controls all shared work plan information
- ○ Control is shared
  - Work breakdown information is controlled by Microsoft
  - Actuals tracking information is controlled by PPM

By default, the parameter value is BOTH.

Deciding control mode

When using MPP files for the integration, you still need to select a control mode (synchronization mode), which decides how information is updated between PPM and Microsoft Project.

The following table describes how uploading MPP files and downloading work plans as MPP files update information in different control modes.

Control mode	Action and consequence	
	Upload MPP file	**Download work plan as MPP file**
PPM-control mode	Create a PPM project work plan from an existing Microsoft Project when the PPM project does not have a work plan.	- Create a Microsoft Project from an existing PPM work plan - Get an updated Microsoft Project with the following information updated: - Planned and actuals information - External predecessors - External successors - Linked tasks information

MSP-control mode	• Create a PPM project work plan from a Microsoft Project when the PPM project does not have a work plan • Update the PPM project work plan with Microsoft Project information (both planned and actuals), EXCEPT the following: • External predecessors • External successors • Linked tasks information (both planned and actuals)	Get an updated Microsoft Project with the following information updated: • External predecessors • External successors • Linked tasks information
Shared control mode	• Create a PPM project work plan from a Microsoft Project when the PPM project does not have a work plan • Update the PPM project work plan with Microsoft Project planned information, EXCEPT the following: • External Predecessors • External successors • Linked tasks information (both planned and actuals)	Get an updated Microsoft Project with the following information updated: • Actuals information • External predecessors • External successors • Linked tasks information

Uploading MPP files to PPM

Uploading an MPP file to PPM synchronizes information from Microsoft Project to PPM. The types of information that get updated in the PPM project work plan depend on the control mode. See "Deciding control mode" on the previous page for more details.

1. Open the project in PPM.
2. If the project does not have a work plan yet:
   a. In the Work Plan portlet in the Summary tab, click the link **Create work plan from mpp file**. Alternatively, you can drag and drop an MPP file to the link location in the Work Plan portlet.
   b. Select an MPP file.
   c. Do resource mapping if the MPP file includes unmapped resources. See "Mapping resources" on the next page for detailed instructions.

   A work plan is created for the project.
3. If the project already has a work plan,

a. In the Work Plan portlet in the Summary tab or in the work plan page, click .

Alternatively, you can drag and drop an MPP file to the icon in the Work Plan portlet.

> **Note:** If the project is in PPM-control mode and already has a work plan, the icon is disabled.

b. Select an MPP file.

c. Do resource mapping if the MPP file includes unmapped resources. See "Mapping resources" below for detailed instructions.

The project work plan information is updated depending on the control mode. See "Deciding control mode" on page 19 for more information.

Downloading work plans as MPP files

Downloading a PPM project work plan as an MPP file synchronizes information from PPM to Microsoft Project. The types of information that get updated in Microsoft Project depend on the control mode. See "Deciding control mode" on page 19 for more details.

1. Open the project in PPM.

2. In the Work Plan portlet in the Summary tab or in the work plan page, click .

   If the project is in shared control mode, the Different Actual dialog will pop up listing the tasks that have changes in actuals information. Confirm the changes and click in the top right corner to download the work plan.

3. In the Export to Microsoft Project window, Click the link **Click here to download the file**.

If a task is linked to an Agile project or to another PPM project, when downloaded to MPP file, this task has the prefix "`[!linked!]`" added in front of the task name.

If a task has external predecessors or external successors, when downloaded to an MPP file, the predecessors and successors are displayed in the MSP custom data fields that you mapped. See "Mapping PPM external predecessors and external successors" on page 23 for detailed instructions.

Mapping resources

Whenever you upload an MPP file to PPM and the MPP file includes resources that cannot be automatically mapped to PPM resources based on their emails or usernames, the Resource Mapping dialog will pop up listing the resources to be mapped.
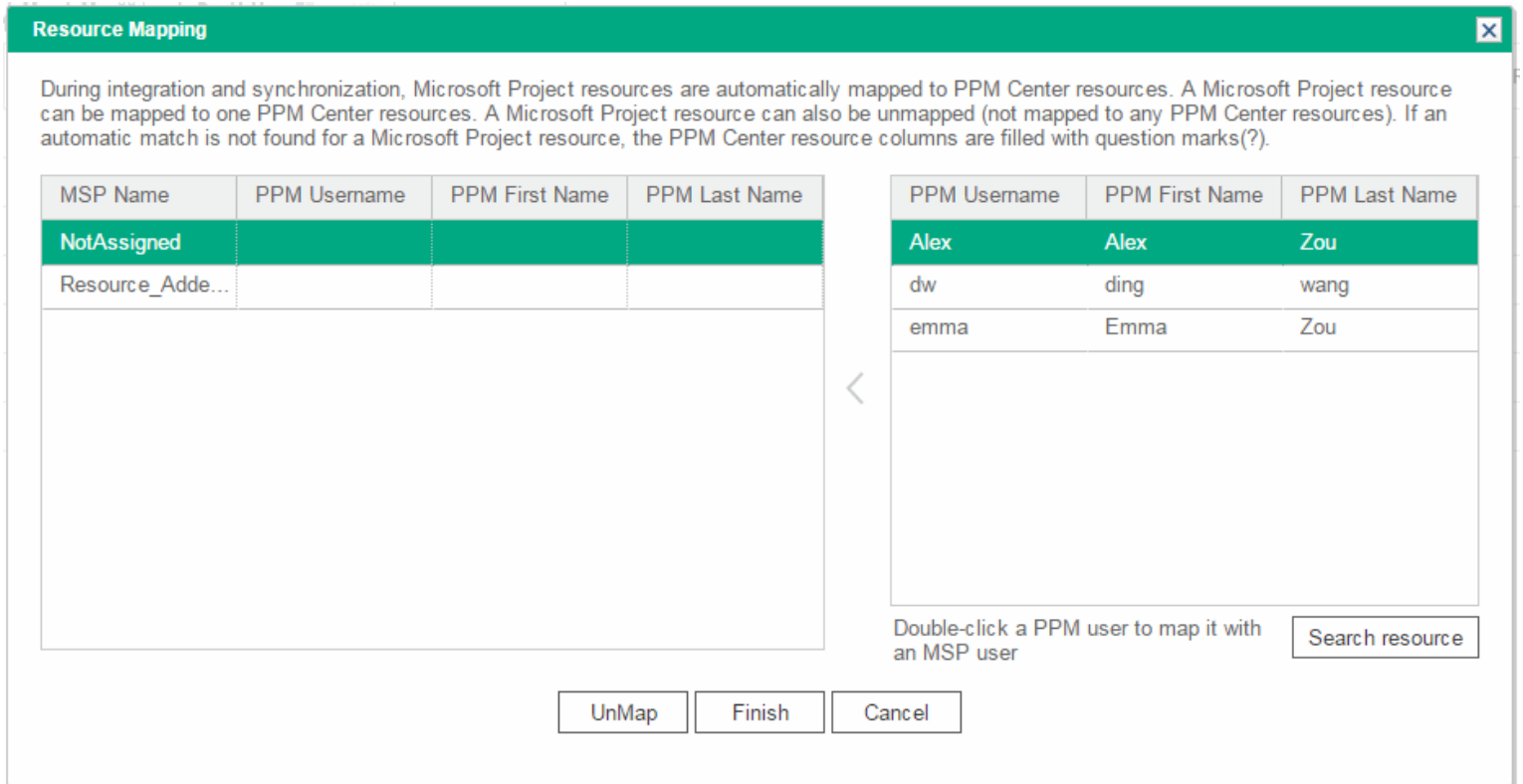
To map an MSP resource to a PPM resource:

1. Select an MSP resource in the left table.

2. In the right table, double-click a PPM resource which is mapped to the MSP resource .

> **Note:** The right table lists resources that are project participants.
>
> If you want to map the MSP resouce to a PPM resource who is not yet a project participant, click **Search resource**.

The PPM Username, PPM First Name, and PPM Last Name columns are filled with the PPM user information. If you then double-click another PPM resource, the foregoing three column values will be updated with the newly-selected resource information.

If you want to unmap an MSP resource, click **Unmap**.

3. Repeat step 1 and step 2 to complete the mapping for the other MSP resources.

4. Click **Finish** to save the mapping and close the Resource Mapping dialog.

If you cancel the resource mapping during MPP file upload, you will cancel the whole MPP file upload process.

If you skip resource mapping (click **Finish** without mapping resources), efforts of unmapped resources will be treated as unassigned efforts in PPM.

If you want to redo resource mapping after an MPP file is uploaded, click 🔳 in the work plan toolbar .
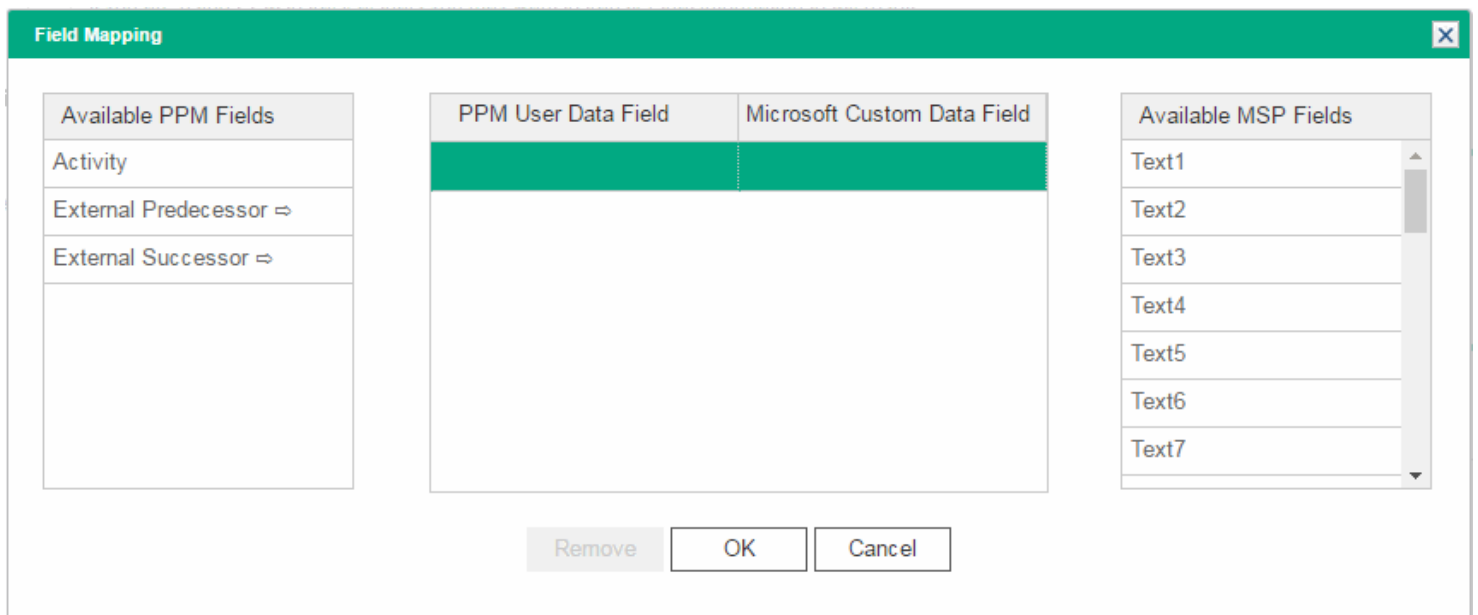
Mapping PPM external predecessors and external successors

PPM external predecessors and external successors can be exported to MSP only when they are mapped to MSP custom data fields.

1. Go to **Project Settings** > **Microsoft Project Integration** > **User Data & Activity Fields Mapping**.
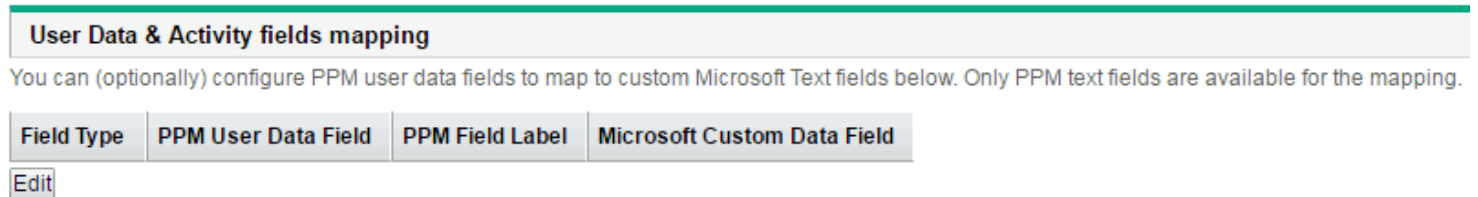
2. Click **Edit** to open the Field Mapping dialog.

3. From **Available PPM Fields** list, double-click **External Predecessor** or **External Successor**, and then from **Available MSP Fields** list, double-click a field where you want external predecessors or external successors to be displayed in MSP .

4. Click **OK** and **Save** to save the mapping.

Mapping MSP baseline data

MSP baseline Finish, baseline duration, baseline work, and baseline start information can be imported to PPM only when they are mapped to PPM user data text fields.

1. Go to **Project Settings** > **Microsoft Project Integration** > **User Data & Activity Fields Mapping**.

User Data & Activity fields mapping

You can (optionally) configure PPM user data fields to map to custom Microsoft Text fields below. Only PPM text fields are available for the mapping.

Field Type	PPM User Data Field	PPM Field Label	Microsoft Custom Data Field

Edit

2. Click **Edit** to open the Field Mapping dialog.
3. From **Available MSP Fields** list, double-click a baseline field, and then from **Available PPM Fields** list, double-click a field where you want the baseline data to be displayed in PPM.
4. Click **OK** and **Save** to save the mapping.

Limitation

- When you download an MPP file in PPM-control mode, all tasks are created to have a fixed duration, and a date constraint is created to help ensure that the start date of the task is the same in MSP as it is in PPM. Otherwise, MSP will try to reschedule the work plan to have all tasks start as early as possible.

- When you download an MPP file in PPM-control mode, leaf tasks' data will not roll up to the summary task automatically. You have to click **Calculate Project** in Microsoft Project to correct the data.

Integration with More Agile Development Tools

To extend the capability of managing Agile projects from within PPM, PPM 9.41 provides out-of-the-box Agile connectors for the following Agile Development tools besides HPE Agile Manager.

- HPE ALM Octane
- Atlassian JIRA
- CA Rally
- VersionOne

This not only frees administrator or developer's efforts of creating an Agile connector before integrating the Agile development tool with PPM, but also increases the flexibility regarding the Agile development tools project managers want to use.

Similar to the integration with Agile Manager, PPM supports data synchronization in the project level and the time sheet level when integrated with the above Agile development tools. And as these integrations are all implemented with Agile Open SDK solution, they share the same workflow.

For more information of the integration, see 9.41 Help Center.

Agile Project Portlets for ALM Octane

In addition to the out-of-the-box Agile connector, PPM provides 6 Agile Project portlets to display ALM Octane epic, user story, feature, and defect information.

- **Agile Projects - Defects by Feature & Status**: lists defects per feature in a specified release to help you analyze feature quality.
- **Agile Projects - Defect List**: lists defects in a specified release.
- **Agile Projects - Features**: lists features in a specified release.
- **Agile Projects - User Story List**: lists user stories in a specified release.
- **Agile Projects - Epics**: lists epics in a specified release.
- **Agile Projects - Cost Per Feature**: lists the cost of each feature in a specified release.

For information about enabling these portlets, see 9.41 Help Center.

Using Dashboard Page Filters

Dashboard page filters are filters added on Dashboard pages. They enable you to change portlet preferences for all portlets in a Dashboard page. With Dashboard page filters available, you do not need to change portlet preferences from one portlet to another.

You can use Dashboard page filters for both Private Dashboard pages and Shared Dashboard pages.

For detailed information about using Dashboard page filters, see the following sections:

Enabling Dashboard Page Filters Feature

Do the following to enable the Dashboard page filters feature:

1. Open Administration Console by selecting **Open** > **Administration** > **Open Administration Console** from PPM menu.
2. Select **Administration Task** > **Application configuration**.
3. Find the parameter `dashboard.Page-Filters-Usage`, and set it to `Automatic`.

   By default, the value is `Disabled`.

   > **Note:** The value of this parameter is case-sensitive. Lower-case values are not working.

4. Restart PPM.

Adding Dashboard Page Filters

After you enable the Dashboard page filters feature, a new section **Filters** is added in the Edit page of Private Dashboard pages and Shared Dashboard pages. This section is where you add Dashboard page filters.

Adding Dashboard Page Filters for a Private Dashboard Page

1. From PPM menu, select **Dashboard** > **Personalize Dashboard**.
2. In the Private pages folder, select the page where you want to add Dashboard page filters.

   The Edit page opens.
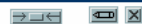
3. In the **Filters** section, click **Add Filter**.

   The Add Filter window opens.

4. Select a filter in the **Filter** field, and click **Add**.
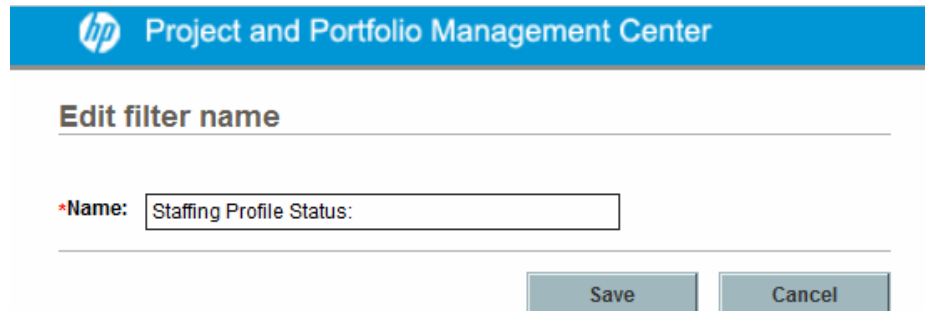
   > **Note:**
   >
   > - Filters available to be selected are derived from preferences of the portlets in the Private Dashboard page. Only some of the preferences can work as filters. For more information, see "Limitations" on page 30.
   >
   > - The Name field is automatically filled with the filter name. You can change the filter name to meet your needs.
   >
   > - The Description field indicates the source of the filter.
   >
   >   In this example, the filter "project" is derived from the preference of the Staffing Profile List portlet.

5. Repeat step 3 and step 4 to add the other filters.

The filters you added are displayed in the **Filters** section of the Edit page. Clicking ✕ to the right of a filter, you can delete it. The system automatically saves the changes when you add or delete filters.

Clicking ✎ to the right of a filter, you open the Edit filter name window where you can change the filter name.

After you add filters for a private Dashboard page, the following entities are added in the Dashboard page accordingly:

- On the top of the page: the **Set Filters On** button, the added filters, the **Save filters values** icon, and the **Reset filters to saved values** icon
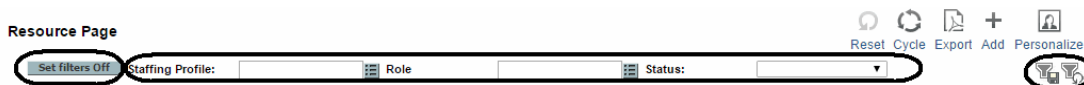
- In each portlet header: the **Disable filters for portlet** icon (⏳)

Adding Dashboard Page Filters for a Shared Dashboard Page

Filters for Shared Dashboard pages are controlled by administrators through configuring modules .

1. Open the Configure Modules page.
2. Select the module where your desired Shared Dashboard page is included.

   The Configure : *<Module_Name>* page opens.
3. Click the Shared Dashboard page in the left pane to open the Edit page.
4. Follow step 3 through step 5 in "Adding Dashboard Page Filters for a Private Dashboard Page" on page 26 to add filters for the Shared Dashboard page.

Applying Dashboard Page Filters

To apply the filters on a Dashboard page:

1. Go to the Dashboard page.

2. Select a value for each filter.

   The Dashboard page reloads every time you change the value of a filter and returns the results in conformity with the filter.

   > **Note:**
   >
   > - The filters values can be empty.
   > - Every filter is not applicable to all portlets in the Dashboard page. It applies only to the portlet whose preference is the source of the filter. For example, if the filter "Status" is derived from the Staffing Profile List portlet preference, it only works for the Staffing Profile List portlet, even though another portlet in the Dashboard page also has a column named "Status".

   If you click ⧩ in the upper-right corner of the page, you save the filters values into database. The filter values are saved per user.

   If you click ⧩ , you reset the filters values to the saved ones. If you do this before saving filters values, the filters values become empty.

If you export the Dashboard page to PDF after applying page filters, the portlets will show the same data in PDF as in the Dashboard page, though the filters will not be exported to PDF.

Turning Filters On/Off

You can turn Dashboard page filters on and off for a Dashboard page or for a specific portlet. By default, page filters are turned on.

Turning filters on/off for a private Dashboard page

You can turn filters on or off for a private Dashboard page in either of the following locations:

- In the Edit page

  Click **Set Filters Off** to disable filters. The **Add Filter** button and the filters are disabled accordingly. To enable filters, click **Set Filters On**.

- In the Private Dashboard page

  Click **Set Filters Off** to disable filters. To enable filters, click **Set Filters On**. If no filters are added, the **Set Filters Off** button is not displayed in the Private Dashboard page and you can only disable filters in the Edit page.

Turning filters on/off for a shared Dashboard page

As an administrator, you can turn filters on and off for a shared Dashboard page in the Edit page only. The button **Set Filters On** or **Set Filters Off** is not displayed in the Shared Dashboard page regardless of whether you add filters.

Once the administrator turns filters on/off, the setting applies to everyone. However, when the filters are turned on, the filter values are still saved in database per user.

Turning filters on/off for a specific portlet

This functionality is applicable to private Dashboard pages only.

To turn filters off for a specific portlet in a private Dashboard page, click the Disable filters for portlet icon ( ) in the portlet header. The Edit icon becomes enabled.

To turn filters on, click Enable filters for portlet icon ( ). The Edit icon becomes disabled.

When you turn filters on for a private Dashboard page, the Edit icon in each portlet header becomes disabled. In order to edit portlet preference, you can do one of the following:

- Turn filters off for the portlet, edit the portlet preference, and then turn filters on for the portlet.
- Turn filters off for the private Dashboard page, edit the portlet preference, and then turn filters on for the whole page.

Limitations

The Dashboard page filters feature has the following limitations:

- Dashboard page filters work for both builder and Java portlets. Page filters come far more from (some but not all) builder portlet preferences than from Java portlet preferences. However, you cannot decide which portlet preferences can work as Dashboard page filters.
- SQL validations with tokens cannot be used as Dashboard page filters.
- There is no way to control who can add Dashboard page filters in the Edit page. Everyone has the right to add filters.
- There is no way to control who can view Dashboard page filters. Everyone has the right to view filters.

Chapter 4: Enhancements, Certifications, and Fixes in PPM 9.41

- "Enhancements" below
- "Certifications" on page 41
- "Fixes" on page 42

Enhancements

PPM 9.41 includes the following enhancements:

Module	Enhancement
Admin Tools	"Showing the number of Web and Workbench sessions opened in each node" on page 36
Costing	"Deciding how PPM calculates Projected Cost" on page 37 "More fiscal years available when updating or allocating budget" on page 38 "Sorting financial summary cost lines by category" on page 40
Resource Management	"Synchronizing staffing profile positions from work plan tasks" on the next page "Setting ignorable unmet demand " "Resource finder returning all resources in one go" on page 38 "Unrequested positions not displayed in Resource Allocation Management page" on page 39 "Renaming table headers in Resource Forecast Cost" on page 39 "Clearer indication of button selection in staffing profile" on page 40

Program Management	• "Universal way to handle project risks, issues, and scope changes in Program Management" on page 34
	• "Calculating program progress based on project progress" on page 34
	• "Another access grant required to delete a program" on page 34
	• "Program name present in exported Excel" on page 40
Time Management	• "Locking time sheets" on page 34
	• "Approving or rejecting time sheet lines in Approve Time page" on page 35
	• "Easier way to view time sheet line notes" on page 40
MSP-PPM Integration	• "Able to add external predecessors in all three synchronization modes" on page 35
Dashboard	• "Another filter added for Project Gantt portlet" on page 36
Platform	• "Not checking JS file updates when including them in a JSP page" on page 37
	• "White list for allowed file extensions" on page 36
	• "Removing Multicast"
User Management Console	• "User Management Console supporting adding user data "

Synchronizing staffing profile positions from work plan tasks

PPM 9.41 lets you copy staffing profile positions from work plan tasks and synchronize changes from work plan tasks. This feature applies to project staffing profile only.

1. Enable the feature by setting the parameter `SYNC_POSITIONS_FROM_WORKPLAN` to `true` in Administration Console.

2. Open a project staffing profile.

3. Click ⬀ in the staffing profile toolbar.

4. Work plan tasks that have roles specified are copied to the staffing profile as positions.

   These positions are indicated with task IDs. Clicking the task ID directs you to the task details page.

   Note:

- Only leaf tasks will be copied to staffing profile as positions.
- Milestone tasks will not be copied to staffing profile as positions.

The following table lists the data mapping between work plan and staffing profile.

Data in work plan	Data in staffing profile
Task name	Position name **Note:** A task name can have 300 characters at most while a position name can have 200 characters at most. If a task name is longer than 200 characters, it will be truncated when copied to the staffing profile.
Task role	Position role
Task ID	Task ID
Scheduled start	Start date
Scheduled finish	Finish date
Scheduled effort	Forecast demand

5. After copying positions from work plan, click ⬚ will synchronize the changes from work plan to staffing profile.

   Therefore, PPM suggests that you do not edit positions copied from work plan as your changes will be lost after next synchronization.

Setting ignorable unmet demand

PPM shows rounded-off value for position unmet demand in staffing profile, although saves the original value in database. Therefore, when the unmet demand is very trivial like 0.00001, it is shown as 0.0 in orange in staffing profile. This is confusing because the number (0.0) indicates fulfillment but the color (orange) indicates there is unmet demand. The same issue happens in over-allocation.

To avoid the confusion, you can use the following parameter to set a threshold for ignorable unmet demand and over-allocation. PPM regards positions as fulfilled when its daily unmet demand (or over-allocation) is smaller than the threshold.

Parameter name	Usage	Values

IGNORE_UNMET_ DEMAND_ THRESHOLD	When a position's daily unmet demand is smaller than the threshold, its unmet demand is ignored and the position is regarded as fulfilled.	Default: `0.000001`
	When the unmet demand is negative (over-allocation), PPM compares its absolute value with the threshold.	

Universal way to handle project risks, issues, and scope changes in Program Management

In this version, PPM adds the Escalation Level field to the Project Risk and Project Scope Change field group and request header type. Therefore, PPM Program Management handles project risks and project scope changes in the same way as it handles project issues — the program page now displays only project issues, project risks, and project scope changes that have set Escalation Level to Program.

Calculating program progress based on project progress

Program progress used to be calculated by the days that has passed since the program start date against the program duration. Now it is calculated by the following formula, based on the work plan percent complete of each project included in the program:

Program Progress = Sum of (Project Scheduled Effort * Percent Complete) / Sum of Project Schedule Effort

Another access grant required to delete a program

PPM introduces a new access grant **Delete Programs**. To delete a program, you must meet both the following requirements:

- Be able to edit the program.
- Have the Delete Programs access grant.

Locking time sheets

Previously, you can freeze a time sheet only when it is approved. Starting from this version, PPM introduces the locking time sheets feature which allows you to freeze a time sheet as long as it is not cancelled, frozen, or closed.

Requirement

You should meet the following requirements before locking or unlocking a time sheet:

- Set the parameter `LOCK_TIMESHEET_ENABLED` to `true` in Administration Console to enable the feature.
- You should have the Lock Time Sheet access grant.

To lock a time sheet:

1. From the main menu, select **Open** > **Time Management** > **Time Sheets** > **Lock Time Sheets**.
2. In the Search for a Time Sheet to Lock page, provide the search criteria and click **Search**.
3. Select the time sheets you want to lock, and click **Lock**.

   The locked time sheets disappear from the search list. There is a lock icon in every locked time sheet.

To unlock a time sheet:

1. From the main menu, select **Open** > **Time Management** > **Time Sheets** > **Unlock Time Sheets**.
2. In the Search for a Time Sheet to Lock page, provide the search criteria and click **Search**.
3. Select the time sheets you want to lock, and click **Unlock**.

   The unlocked time sheets disappear from the search list. The lock icon no longer exists in the unlocked time sheets.

Time sheet audit trail will keep records of who locked or unlocked a time sheet at what time. Locking or unlocking a time sheet does not change the time sheet status.

Approving or rejecting time sheet lines in Approve Time page

You can approve or reject time sheet lines in the Approve Time page, the same location where you approve or reject time sheets, without opening the time sheet page.

1. Click **Open > Time Management > Time Sheets > Approve Time.** to open the Approve Time page.
2. Click **TIme sheet line level**.
3. Provide the search criteria, and click **Search**.
4. Select the time sheet lines you want to approve or reject, and click **Approve** or **Reject**.

Able to add external predecessors in all three synchronization modes

Previously, when a PPM project is integrated with Microsoft Project, you can add external predecessors for a task only in the PPM-controlled synchronization mode. Starting from this version, you can add external predecessors in any of the three synchronization modes.

To add an external predecessor for a task,

1. Select the task.

2. Either click ▣ in the work plan or click **Add a predecessor** > **Add External Task** in the task details page.

Another filter added for Project Gantt portlet

In this version, PPM adds another filter for the Project Gantt portlet, that is **Include in Gantt Only Tasks with External Predecessors**.

Checking this option clears the selection of the other three options, and vice versa.

Showing the number of Web and Workbench sessions opened in each node

PPM Administration Console now shows how many Web sessions and Workbench sessions are opened in each node.

1. Click **Administration Console** > **System Health** > **Nodes**.
2. Click a specific node.
3. In the Node Details, check the values of the Opened Web Sessions and Opened Workbench Sessions.

White list for allowed file extensions

PPM introduces the following parameter for you to define the files that are allowed to be uploaded to PPM.

Parameter Name	Description	Example
DMS_SECURE_FILE_ EXTENSIONS_WHITE_LIST	Defines a list of comma-separated file extensions that are allowed to be uploaded to PPM. If defined, it has priority over the following parameters: • DMS_INSECURE_FILE_EXTENSIONS • DMS_INSECURE_FILE_EXTENSIONS_ CHECK	txt, html, docx

Not checking JS file updates when including them in a JSP page

PPM used to check whether JS files were modified every time before including them in a JSP page. This has an impact on performance. Starting from 9.41, you can set the following parameter in the Administration Console to change the default behavior.

Parameter Name	Usage
CHECK_STATIC_JS_FILES_UPDATES	When set to `false` (the default value), PPM does not check whether JS files were modified every time before including them in a JSP page. When set to `true`, PPM checks whether JS files were modified every time before including them in a JSP page and recomputes the hash accordingly.

Deciding how PPM calculates Projected Cost

Projected Cost is the total cost required to complete an entity (for example, a project). It is estimated on the current entity progress.

PPM provides two methods to calculate Projected Cost. You can use the following parameter to choose the one that aligns with your business needs.

Parameter Name	Values	Description

| PROJECTED_COST_ FORMULA_TYPE | Default value: `comparative`

Valid values: `comparative`, `absolute` | This parameter controls how PPM calculates projected cost.

Generally, Projected cost = the cost of each previous month + the cost of the current month + the cost of each future month.

• When set to `comparative`,
  • the cost of each previous month equals to the actual cost when actual cost is not blank or zero, otherwise, it equals to the forecast cost.
  • the cost of the current month equals to the higher of the actual cost and the forecast cost.
  • the cost of each future month equals to the forecast cost.

• When set to `absolute`,
  • the cost of each previous month equals to the actual cost.
  • the cost of the current month and of each future month equals to the forecast cost. |

More fiscal years available when updating or allocating budget

Previously, only three years (lat year, current year, and next year) are available in the Fiscal Year drop-down list when you update budget. PPM 9.41 expands the usage scope of the following two parameters so that you can use them to control the number of fiscal years displayed in the Update Budget page and Allocate Budget page.

- NUMBER_OF_FUTURE_YEARS_TO_SHOW_ON_FINANCIAL_SUMMARY
- NUMBER_OF_PAST_YEARS_TO_SHOW_ON_FINANCIAL_SUMMARY

Resource finder returning all resources in one go

When you click the assign icon for a position in the Staffing Profile New UI, the resource finder used to return 10 resources at most by default. You have to click **More** to load 10 more resources every time. Now PPM removes the **More** link and the resource finder returns all the resources that meet your requirements in one go.

> **Note:** The maximum number of resources returned by the resource finder is controlled by the parameter `RESOURCE_FINDER_SEARCH_MAX_USERS`.

Unrequested positions not displayed in Resource Allocation Management page

Gantt View of the Resource Allocation Management page does not show positions that did not send resource request or have resource request rejected.

- The Not Fulfilled filter does not include new and rejected positions.
- In advanced filter, if you leave **Position Status** empty, PPM returns all positions except new positions. To search new positions, the only way is to select **New** in Positions Status.

Removing Multicast

PPM 9.41 removes multicast for server cluster environments:

- JGroups is replaced by Apache ActiveMQ for the cache synchronization between nodes in a server cluster environment. PPM uses the end-to-end TCP/IP connections for the communication between nodes. This replacement invalidates all the `MULTICAST_*` parameters in the `server.conf` file.
- Multicast monitor is removed.

User Management Console supporting adding user data

User Management Console supports adding user data of the following types: attachment, auto-complete list, drop-down list, password, radio button, text area, text field, link, and web address.

Renaming table headers in Resource Forecast Cost

The table in Project Overview page > Cost Tab > Resource Forecast Cost tab displays cost from staffing profile. To clarify it, PPM renames the table headers as follows:

- Total Forecast Cost is renamed **Total Resource Forecast Cost**
- Forecast Cost to Date is renamed **Resource Forecast Cost to Date**

Carriage returns displayed correctly in table components

In the text areas of table components, the carriage returns in the view mode is displayed correctly, the same as they are entered and displayed in the edit mode.

Program name present in exported Excel

When you export a program to Excel, program name is now present in the Overview sheet of the exported Excel file.

Clearer indication of button selection in staffing profile

In the Staffing Profile New UI and Resource Allocation Management page, PPM indicates more clearly which view, period, or effort unit you actually selected.

Easier way to view time sheet line notes

The note icon () is present in the front of a time sheet line if it has notes saved. Putting the mouse over the icon displays the content of the latest three notes. If this cannot show the complete notes, click into the time sheet line details.

Sorting financial summary cost lines by category

The cost lines in the Financial Summary page and Edit Costs page are sorted by category alphabetically.

Certifications

PPM 9.41 adds support for the following.

Operation System

- Microsoft Windows 10 Enterprise Edition (both 32- and 64-bit)
- Mac OS 10.12 Sierra

PPM Server Platform

- Microsoft Windows Server, 2016, Standard and Enterprise Edition (64-bit)

Browser

- Mozilla Firefox 45.7 ESR
- Google Chrome 56
- Safari 10.0 on Mac OS 10.12 Sierra

Tablet Computer

- iPad 4 with iOS 10

Secure Communication Software

- OpenSSH version 7.4 included in Cygwin for Windows Server

Fixes

PPM 9.41 includes the following defect fixes.

Costing

CR	Problem	Resolution
QCCR1L60688	In Resource Forecast Cost page, the cost table should not be viewed by users without the "View Project, Program, and Time Sheet Cost Data" access grant.	Users cannot access the cost table in Resource Forecast Cost page without required permissions.
QCCR1L61450	In Project Overview page > Cost tab > Resource Forecast Cost tab, when nobody is assigned to a position, it reads "No Assignement" which should be "No Assignment".	The spelling error is corrected in the Resource Forecast Cost tab.
QCCR1L61599	In Years view of financial summary, when you add new cost lines with the expense type set to "Capital", and then change the type to "Operating", the actuals columns are not displaying correct values.	In Years view of financial summary, when you add new cost lines with the expense type set to "Capital", and then change the type to "Operating", the actuals columns are now displaying correct values.
QCCR1L61668	In Project Overview page > Cost tab > Financial Summary tab, the line graph of approved budget should match the start date and end date of fiscal year instead of calendar year.	The line graph of approved budget matches the start date and end date of fiscal year.
QCCR1L61803	Total values in Financial Summary Compare Snapshots are not calculated correctly.	Total values in Financial Summary Compare Snapshots are calculated correctly.
QCCR1L62031	The column heading "Total Hours" in Project Overview page > Cost tab > Resource Forecast Cost tab should be renamed "Total Cost" or something similar.	The column name "Total Hours" in Project Overview page > Cost tab > Resource Forecast Cost tab is renamed "Total Cost".

QCCR1L62403	Period sums and totals are not correct in financial summary when changing Type or Expense Type in Yearly view	Period sums and totals are correct in financial summary when changing Type or Expense Type in Yearly view
QCCR1L62422	When your project region currency is different from your base currency, the values and symbol for NPV and Nominal Return shown on Project Overview page > Cost tab > Financial Summary tab are inconsistent. Suppose the base currency is AUD whereas the project region currency is NZD. In Project Overview page > Cost tab > Financial Summary tab , NPV and Nominal Return are AUD values shown in NZD currency symbol.	NPV and Nominal Return are shown in base currency value and symbol in Project Overview page > Cost tab > Financial Summary tab.
QCCR1L62471	Total Forecast Cost in the Project Overview page > Cost tab > Resource Forecast Cost tab should not count manually added cost lines, labor or non-labor. It should count only the forecast costs from staffing profile.	Total Forecast Cost in the Project Overview page > Cost tab > Resource Forecast Cost tab count forecast cost from staffing profile only.
QCCR1L63123	It is difficult to resize the total value column in the Cost Details and Benefit Details sections of financial summary. You have to put the cursor in the exact position.	Resizing the total value column in Cost Details and Benefit Details sections becomes easy, as the area where you can focus the cursor is widened.
QCCR1L63503	The CATEGORY_CODE column of the KCST_BUDGET_LINES table only allows 30 characters, while the code column in other tables allows 40 characters. This column in all the tables should use the same length.	The data type of the CATEGORY_CODE column is updated from 30 to 40 in the following tables: • FM_BENEFIT_LINES • FM_BENEFIT_LINES_CDC (only used for Operational Reporting) • FM_FAL_CDC (only used for Operational Reporting) • FM_FORECAST_ACTUAL_LINES

Dashboard

CR	Problem	Solution
QCCR1L62733	If you check **Export to HTML Excel** in portlet reference page, the portlet digital data does not get rounded off in the exported Excel. If you do not check the option, the digital data gets rounded off in the exported Excel but is displayed as text which cannot use Excel functions.	If you do not check **Export to HTML Excel** in portlet reference page, the portlet digital data gets rounded off in the exported Excel and is displayed as numbers which can use Excel functions.
QCCR1L62964	When you export a portlet to Excel, the 0s to the right of thousand numbers are lost. For example, you see in the portlet "2.000", but in the exported Excel, this number becomes just "2". This happens when the number has no decimals. If the number has decimals, the 0s are kept.	The 0s of thousand numbers are always kept when exported to Excel.

Demand Management

CR	Problem	Solution
QCCR1L52350	The Report Running notifications and the notifications for failed reports are not received.	You can now receive Report Running notifications and notifications for failed reports.
QCCR1L54042	After the upgrade to PPM 9.21, you cannot see table component entries count and if you add the table component field into a portlet as a column, the column shows wrong value for the table component entries count.	PPM now obtains total table component entries count and display it correctly in portlets.
QCCR1L61231	Not able to add a new reference (Request (New)) to a project. The error "Entity not found." is displayed.	You are now able to add a new reference (Request (New)) to a project.

QCCR1L62161	If you do not have view access to a numeric field in a request search result, and you export the search result to Excel, you have problems opening the exported Excel.	You no longer have problems opening the exported Excel. The values of the field you do not have view access are displayed as "<Restricted>" in the Excel.
QCCR1L62612	A proposal failed to be converted to a project with data populated in Financial Data Table	Proposals are converted to projects successfully with their IDs referred to each other.
QCCR1L63093	PPM fails to run some Web services such as setRequestsFields, executeWFTransactions, and getRequests.	PPM runs these Web services successfully.
QCCR1L63267	After moving to 9.32, some standard functionalities like creating request or searching requests by the request type filter are very slow.	There is no performance issue in the request type field.
QCCR1L63487	When you export a request search result to Excel, some columns in the Excel show empty values, however, they have values in the search result page.	When you export a request search result to Excel, the data in the Excel file is the same as that in the search result page.

Deployment Management

CR	Problem	Solution
QCCR1L47732	When you create a report, schedule the report to run some time after the creation time, and then change the settings to run the report immediately, you will find the Run Date is the report creation time instead of the report run time.	The Run Date displays the run time of reports instead of the creation time of reports.
QCCR1L62761	When Oracle EBS 12.2.5 is used as the Object Migrator Host, if you submit an Object Migrator concurrent request from Deployment management Extension for Oracle Apps, the request fails to be fulfilled, showing the "SYSTEM-UNABLE TO SET NLSSORT" error.	When Oracle EBS 12.2.5 is used as the Object Migrator Host, if you submit an Object Migrator concurrent request from Deployment management Extension for Oracle Apps, the request is fulfilled successfully.

| QCCR1L62774 | If there are more than 5000 security groups with the access grant "Submit Reports" or "Edit All Reports" in a PPM instance, migrating a report type to this instance fails. | Migrating a report type to a PPM instance which has more than 5000 security groups with the access grant "Submit Reports" or "Edit All Reports" is successful. |
| QCCR1L63623 | Migration some files using SCP command fails. | Migrating files using SCP command is successful. |

Documentation

CR	Problem	Solution
QCCR1L58226	In the section "Periodically Stopping and Restarting the Server" of the *Installation and Administration Guide*, it says that it is recommend to stop and restart the PPM servers once a month. This information is obsolete and should be removed from the guide.	Remove the section "Periodically Stopping and Restarting the Server" from the *Installation and Administration Guide*.
QCCR1L59386	Projects and requests should be created or submitted without issues.	See "Backing up customized JS and CSS files before upgrade ".
QCCR1L59743	Performance issue occurs when more than 10 users are connected to the system.	Added the following note into the PPM Sizing Recommendations guide: If you insist on hosting database in VM, make sure you allocate dedicated CPU resources for PPM.
QCCR1L59989	SQL rule fails to update a field when it is not visible in request details page and there are no other visible fields in the current section.	See "When SQL rule fails to update a field".
QCCR1L62893	setFieldEditable function is not working for ACL and drop down validationeven that the user has access to edit them.	See "When setFieldEditable UI rule does not work".

| QCCR1L63699 | Update all the necessary documents for PPM 9.40 with Operational Reporting CP 4.0 information. | Added operational reporting compatibility in 9.40 support matrix guide.

For details, see the updated 9.40 support matrix guide: KM02555507. |

Installer

CR	Problem	Solution
QCCR1L63933	Fail to install best practices after the upgrade to 9.40.0001.	You can successfully install best practices after upgrading PPM to 9.40.0001.

Integrations

CR	Problem	Solution
QCCR1L59323	The ALM/QC integration does not work if some PPM-ALM field mappings become invalid in a way that user are unaware of, for example, an ALM field is changed by the upgrade process.	The integration previously does not work when a. PPM field is removed; b. The token of PPM field is changed; c. ALM/QC field is removed. Now the integration works in these cases and corresponding error messages are recorded in PPM server logs.
QCCR1L61999	When trying to map multi-select field values , the values are successfully updated from PPM to ALM. However, when trying to update from ALM to PPM, single values are getting updated while multiple values are not.	The multi-select field values can be updated successfully from ALM to PPM.

QCCR1L62537	The user's regional calendar will be updated to the calendar of the default region, if the region is not specified when submitting the import users report. This will causes the inconsistent between region and region calendar.	The user's regional calendar will keep the original value, if the region is not specified and **Keep existing values for empty columns?** is set to yes when submitting the import users report.
QCCR1L62532	PPM-ALM synchronization fails when trying to reopen PPM request from ALM side.	PPM-ALM synchronization will not fail when trying to reopen PPM requests from ALMside.
QCCR1L62646	If the "ALM - Create QC Requirement" execution step fails, and after that when you retry the execution with exactly the same information, it does not fail but instead gets timed out and just hangs.	PPM now rolls back the transaction and create a new transaction to update the table ppm_int_qc_entity_map when the ALM REST service fails to create ALM entities.
QCCR1L62789	After you select the **Create an Operational Request for Change (RFC) upon task save** check box in the Operational RFC tab of the Task Details page, and then click **Save** or **Done**, the page refreshes with the check box unselected.	When you select the check box, saving the Task Details page will not deselect the check box.
QCCR1L62807	For QC/ALM-controlled or bidirectional-controlled field mappings, if you empty the field value in ALM, the value of the corresponding PPM field will not be cleared and the earlier value will be kept.	For QC/ALM-controlled or bidirectional-controlled field mappings, if you empty the field value in ALM, the value of the corresponding PPM field will be cleared accordingly.
QCCR1L62895	When you add an integration configuration for View Project Quality with the QC/ALM Server URL field starting with https, you will see an error message with red font: `You must provide a valid URL for the field "QC/ALM Server URL". For xxample, http://:/qcbin/`	When you add an integration configuration for View Project Quality with theQC/ALM Server URL field starting with https, the error will not occur.

QCCR1L63004	Cannot configure the ALM/QC integration when the ALM password contains special characters like "<" or "&".	You can now configure ALM/QC integration when your ALM password contains special characters.
QCCR1L63677	In Project Settings page > Microsoft Project Integration > Field Mapping window, PPM fields overlap if they have long names.	Long field names are displayed correctly in the Field Mapping window.
QCCR1L63632	If PPM field name is like"<script>alert(1)</script>", an error appears in Project Settings page > Microsoft Project Integration > Field Mapping window.	Such PPM fields names do not cause the error.
QCCR1L59443	Documents are not deleted from database DMS if you delete documents from the attachment fields of requests.	When a document is deleted from an attachment field, PPM makes the columns PARENT_ENTITY_ID and PARENT_PRIMARY_KEY null for the document in the table KNTA_DOCUMENTS. Document Cleanup Service will remove documents whose PARENT_ENTITY_ID and PARENT_PRIMARY_KEY are null.

This solution only works for newly deleted documents. If you want to clean the previously deleted documents, use the function is_attachment_empty. |
| QCCR1L59692 | Under Generic SSO, PPM throws an unknown error when you click Sign-out link after waiting for as long as KINTANA_SESSION_TIMEOUT specifies. | Under Generic SSO, you can sign out without the error. |

Platform

CR	Problem	Resolution
QCCR1L53584	itg_containers query is shown in the AWR report as an expensive query.	Reduce the unnecessary query of itg_settings_containers.

QCCR1L58094	Broker Performance Report shows a lot of "-1" values in the ItgDS column after the upgrade to PPM 9.31.	PPM combines two datasources (kintana and ItgDS) into one (ItgDS), and updates the parameters for the Broker Performance report. Therefore, starting from 9.41, this report has a new format as follows.

```
Broker Performance Report for server 'HPPPM'
 RMI_URL = rmi://172.31.9.4:21199/KintanaServer
[DBConnectionBroker.getServerAdminReport]

Parameter                 ItgDS
----------------------    -----------------------------
PoolingCount              5
PoolingPeak               10
PoolingPeakTime           Wed Jan 18 04:01:42 UTC 2017
ActiveCount               1
ActivePeak                10
ActivePeakTime            Wed Jan 18 04:01:42 UTC 2017
ExecuteCount              42462644
CommitCount               5176078
```

QCCR1L60893	When you export a program to Excel, the Excel file is generated with `.do` extension. It should be ended with `.xlsx` extension.	The exported Excel file is ended with `.xlsx` extension.
QCCR1L60863	Open cursors are exhausted in the database because of cursor leak.	There is no cursor leak.
QCCR1L61695	When you add the Resource Allocation Management page to My Links, it gets displayed in My Links. However, after you go to another page and add it to My Links, the Resource Allocation Management page is no longer displayed in My Links.	The Manage Allocations page, if added to My Links, will always be displayed in My Links.
QCCR1L62041	The Interface Tables Cleanup service does not clean the table RSC_RESOURCES_INT.	The Interface Tables Cleanup service now cleans the table RSC_RESOURCES_INT.
QCCR1L62381	ORA-00923 error is thrown when wildcard (*) is used in outer select clause of portlet data source.	PPM now supports wildcard (*) in outer select clause of portlet data source. Using wildcard in outer select clause will not throw ORA-00923 error.
QCCR1L62610	If a report fails, notifications should be sent.	Notifications are sent when reports fail.
QCCR1L62730	ORA-01403 exception is thrown in some corner cases.	No ORA-01403 exception is thrown.

QCCR1L62550	HTML format notifications are sent as text message instead of HTML message after the upgrade to PPM 9.32.	PPM improves email client since 9.31 to follow the RFC. This requires that in each HTML format notification template, there is only one dot (.) in the front of each css class. You should check all HTNL format notification templates in PPM Workbench and manually delete extra dots.
QCCR1L63111	When PPM email notification service fails to update the status of sent notifications correctly, it would send all notifications in the next run. This results in sending duplicate emails.	The email notification service is improved to avoid sending duplicate emails.
QCCR1L63109	There is no timeout when connecting to SMTP server. If SMTP server is down, the email notification server will hang forever.	If SMTP server is down, the email notification server will time out.
QCCR1L63102	When a notification fails, the background service monitor no longer shows the exception.	When a notification is sent to an invalid email address, the email address will be logged in View Service Audit Page > Notification Service > Service Process Records > details.
QCCR1L63099	PPM treats all exceptions other than SendFailedException as IO_ERROR, which is confusing. For example, in customer's server log, the email notification thread throws OOME while PPM logs "SMTP server is down".	PPM treats exceptions separately.
QCCR1L63242	Installation hangs when trying to upgrade from version 9.1 to 9.2 and then to 9.3.	Upgrading from 9.1 to 9.2 and then to 9.3 goes successfully.
QCCR1L63338	Out of memory error occurs due to a huge search.	Doing the huge search does not cause out of memory error.
QCCR1L63405	The mbeans of datasource is not available after PPM 9.30.	To get the information of mbean from JMX Console, select **com.alibaba.druid** > **type=DruidDataSource**.
QCCR1L63456	PPM does not show the correct time zone of Istanbul.	Time zone of Istanbul is shown correctly.

QCCR1L63473	Users get disabled after deleting end date from User Management Console	When deleting end date from User Management Console, users are still enabled.
QCCR1L63472	Some user information like Title, Department, Direct Manager, Location, Category, and Cost Category gets deleted after editing and saving End Date from User ManagementConsole	Editing and saving user's end date in User Management Console does not delete other user information.
QCCR1L63484	PPM sets a corrupted cookie when you open the Project Overview page. It causes F5 load balancer to fail to recognize its own cookie and therefore break F5 cookie-based session persistence. This issue does not impact the Web server-based load balancing (Apache/IIS + Mod_jk).	PPM does not set the corrupted cookie anymore, and F5 cookie-based session persistence works as expected. PPM also suggests that F5 administrators check the F5 documentation about how to deploy F5 and Apache Tomcat (as PPM uses Tomcat 7as its server): https://www.f5.com/pdf/deployment-guides/f5-tomcat-dg.pdf.
QCCR1L63600	RMI connection leak causes PPM to be unstable.	RMI connections are closed properly so that PPM multicast communication works stably.
QCCR1L63634	Sometimes some reports stay in "Running" and do not complete their commands even when an error is thrown.	The reports are working as expected without the error.
QCCR1L63654	Memory leak occurs in the org.hibernate.impl.SessionImpl objects.	Free the org.hibernate.impl.SessionImpl objects correctly.
QCCR1L63320	JSP reports cannot parse tokens passed from the previous commands in runtime.	JSP reports support runtime tokens.
QCCR1L63894	PPM should not generate session IDs for static resources.	PPM no longer generates session IDs for static resources.
QCCR1L64015	In User Management Console, if you select **yes** for **New password on login**, you need to change password every time you log in.	If you select **Yes** for **New password on login**, you only need to change password when you log in for the first time. After that, **New password on login** will automatically becomes **No**.

Portfolio Management

CR	Problem	Solution
QCCR1L57019	In Swiss session, the currency is displayed as SFr. in financial summary which is more or less correct (should be CHF). However, in the Scenario comparison the currency is displayed as SwF, which is wrong.	The currency symbol for Swiss Franc" is updated to CHF in the table KCST_CURRENCIES_NLS.

Program Management

CR	Problem	Solution
QCCR1L62900	The Program page cannot be displayed correctly in IE11 if the browser is in compatibility mode.	The Program page is displayed correctly in both standard mode and compatibility mode of IE 11.
QCCR1L63006	Not able to add a new reference (Request (New)) to a program.	You are now able to add a new request as a reference to a program.
QCCR1L63745	In the Risks portlet of Program Overview page, risk count is considering the project risks that are not escalated to the program level.	In the Risks portlet of Program Overview page, risk count does not include the project risks that are not escalated to the program level. This fix updates the logic of the table KPMO_PROGRAM_LIST_V. If you want a reporting view that lists all high-severity risks regardless of escalation level, you should contact HPE support for help.
QCCR1L62634	When you try to enable Portfolio Management for a program and the program has some of its content added to another program that has Portfolio Management enabled or to another portfolio, you will get a general warning message without information about which content causes the warning.	The warning message lists the program's content that causes the problem.
QCCR1L64058	Program progress is incorrect if the program includes a project that has baseline.	The calculation of program progress excludes project baselines.

Project Management

CR	Problem	Solution
QCCR1L53214	If the column Scheduled Duration (days) is not displayed in work plan, your changesto the column Scheduled Finish will notbe saved.	Your changes to the Scheduled Finish column are saved no matter whether or notthe column Scheduled Duration (days) is displayed in work plan.
QCCR1L58318	Errors appear when trying to delete a work plan.	You can delete a work plan without the errors..
QCCR1L60053	When you change the duration of a task on a work plan in Schedule view and click **Save**, the system takes more than 12 seconds before it pops up a prompt saying that the save is occurring. If you click Save during that lag before the Save message appears, you get a prompt including long running script.	A new parameter `VALIDATE_TASK_USER_DATA` has been added and its default value is `true`, which means PPM validates tasks' user data when you save a work plan. It is not recommended to change the parameter's default value unless there is serious performance issue. Check this with HPE Support before changing the parameter value to `false`.
QCCR1L61350	In the work plan where daily working hours is set to 7.6, scheduled effort is not calculated correctly in the Quick view.	Scheduled effort is calculated correctly in the Quick view.
QCCR1L61484	When you update % Complete in the My Tasks Portlet, the Estimated Remaining Effort (hrs) is reset to 0.	If the actual effort is 0, Estimated Remaining Effort keeps the original value while % Complete is updated in the My Tasks portlet.
QCCR1L61712	At the end of each month the project cost health changes to green and then changes back to red at the beginning of next month.	Project cost health indicator is always correct.
QCCR1L62975	The Earned Value Analysis graph in Project Overview page > Cost tab > Earned Value Analysis tab looks odd.	The Earned Value Analysis graph in Project Overview page > Cost tab > EarnedValue Analysis tab looks normal now.

QCCR1L63355	When you search resources and export the search result to Excel, the resource user data columns in the exported Excel show "parameter" value instead of "visible parameter" value of the user data fields.	Correct user data values are used in Excel file.
QCCR1L63421	PPM 9.31 is not deleting projects properly from all the database tables. It causes that the projects cannot be moved to next workflow actions and you cannot perform any action on the projects.	If you delete a project, the project is deleted completely.
QCCR1L63604	Deleting a project results in the loss of financial summaries of other entities that are not linked to the deleted project.	Deleting a project does not delete the financial summaries of other unlinked entities.
QCCR1L62295	PPM main menu disappears when you perform some actions.	PPM main menu is always available.
QCCR1L63987	Cannot add references for project tasks.	You are now able to add references for project tasks witout errors.

Resource Management

CR	Problem	Solution
QCCR1L58960	When you add a position to a proposal staffing profile and create a project from the proposal, the Assignments Needed section is empty in the Add Position window if a project manager logs in to view the position.	The Assignments Needed section is not empty in the Add Position window if a project manager logs in to view the position.
QCCR1L59225	The resources assigned to a specific position should be sorted by full name alphabetically.	The resources assigned to a position are sorted by full name alphabetically in staffing profile New UI.

QCCR1L59997	When a resource who is not in any resource pool is selected in the Specific Resources Requested field, and then the Resource Manager tries to assign the resource, PPM 9.31 gives the error message: "NoTitle - NoText".	Resources who are not in any resource pool or are in a different resource pool that a position's resource pool cannot be assigned to the position.
QCCR1L61738	Project Overview page > Cost tab > Resource Forecast Cost tab is showing incorrect number.	The cost values in the Resource Forecast Cost tab are correct.
QCCR1L62780	In staffing profile New UI, suppose you enter effort for each month of a quarter (Q1 for example) in the Month view, and then enter effort for another quarter (Q2 for example) in the Quarter view. Q1 effort is broken down evenly into 3 months, overriding the original value of each month in Q1.	When the demand or allocation for a period is not changed, entering effort in a different view does not impact the original effort of each month in the period.
QCCR1L62931	When you edit the Staffing Profile Status preferences in the Resource Request portlet, view the portlet, and then go back to edit the reference, the preference set previously is not preserved.	The setting of the Staffing Profile Status preference in Resource Request Portlet is preserved.
QCCR1L63653	It is slow to search a resource pool and click View Forecast Demand in the resource pool.	The performance with viewing forecast demand of a resource pool is improved.

Time Management

CR	Problem	Solution
QCCR1L60940	Time sheet auto-population takes far more time for the same batch than before.	Time sheet auto-population takes more or less the same time for the same batch as before.
QCCR1L60952	Users should not be able to log time against a project whose work plan is not in active status.	Users are not allowed to log time against a project whose work plan is not in active status.

QCCR1L62123	Performance issue when adding project tasks to a time sheet.	The time it takes to add project tasks to a time sheet is reduced.
QCCR1L62833	An error occurs when viewing Approvals/Transaction Details and then closing thewindow: `Your session has timed out due to inactivity. Any unsaved changes have beenlost. Please refresh the Time Sheet to continue with your changes.`	The error does not occur when viewing Approvals/Transaction Details and thenclosing the window.
QCCR1L63107	Daily cost of time sheets created through the Web service is not synchronized to financial summary.	Actuals of time sheets created through the Web service is synchronized to financial summary.
QCCR1L63353	If you submit time sheets through SOAP Web service, the time sheets daily costs are not calculated.	If you submit time sheets through SOAP Web service, the time sheets daily costs are calculated.
QCCR1L63388	The column "Approvable Line Costs" in Approve Time page shows zero.	The column "Approvable Line Costs" in Approve Time page shows correct values.

Chapter 5: Known Problems and Limitations in PPM 9.41

This software release has the following known issues and limitations. This is a cumulative list of known issues and limitations in PPM 9.41. The problems are categorized by the affected product area. If a problem has an assigned internal tracking number, the tracking number is provided (in parentheses) at the end of the problem description.

Platform

Known Issue: PPM encounters NullPointException when restarted because of a known issue on the side of IBM JDK. For more information about this known issue, see http://www-01.ibm.com/support/docview.wss?uid=swg1IV80396. (QCCR1L62987)

Workaround: Upgrade IBM JDK to a version where this issue has been fixed.

Problem: PPM server crashes due to a JVM bug. (QCCR1L57796)

 Workaround: None.

This is a known issue related to GZIP compression in Oracle Java Virtual Machine (for details, see http://bugs.java.com/bugdatabase/view_bug.do?bug_id=8028216). If you see GZIP exceptions in the server log, you should set the parameter `GZIP_ENCODING_ENABLED` to `false` until Oracle fixes the issue.

Admin Tools

Known Issue: When you edit the value of a parameter in Administration Console, include special characters in the value, and save the change, the value is displayed the same as your input. However, when you edit the same parameter for the second time and save the change, the value is not displayed the same as your input.

Workaround: None.

Program Management

Known Issue: You cannot clear filters for the scope changes table in the Program Overview page.

Workaround: None.

Known Issue: When you are in Program Overview page > Details tab, clicking the Issues, Risks, Scope changes, or Business objectives link in the program header will not take you to the corresponding sections.

Workaround: None.

Limitation: Errors occur when you use user data of the file chooser type in programs.

Workaround: Use the user data of the attachment type instead.

Integration

Limitation: When you download an MPP file in PPM-control mode, all tasks are created to have a fixed duration, and a date constraint is created to help ensure that the start date of the task is the same in MSP as it is in PPM. Otherwise, MSP will try to reschedule the work plan to have all tasks start as early as possible.

Workaround: Manually reschedule the task start date according to the date constraint.

Limitation: When you download an MPP file in PPM-control mode, leaf tasks' data will not roll up to the summary task automatically.

Workaround: Click **Calculate Project** in Microsoft Project to correct the data.

Kown Issue: In PPM-JIRA integration, authentication will fail if the JIRA has limited the allowed maximum authentication attepts.

Workaround: Leave the setting "Maximum Authentication Attempts Allowed" blank so that you can have unlimited authentication attempts.

Platform

Known Issue: When you open Program Overview page in Safari, sorting the Content table by a column whose name is not completely shown causes the column name to overlap.

Workaround: None.

Known Issue: When you edit preferences for the Resource Request portlet in Safari, using some filters, such as the Resource Pool Manager filter, results in an "unknown element" warning.

Workaround: None.

Chapter 6: Documentation Errata

The following documentation items are incorrect.

Upgrade Guide

Backing up customized JS and CSS files before upgrade

Error: The upgrade guide does not include the information that you should back customized JS and CSS files before the upgrade.

Correction: Add the following information in the guide:

Before the upgrade, check whether the following files are customized:

- `<PPM_Home>\deploy\itg.war\web\knta\crt\js\RequestRulesSystemLibrary.js`

- `<PPM_Home>\deploy\itg.war\web\knta\crt\css\RequestRulesUserCSS_rtl.css`

- `<PPM_Home>\deploy\itg.war\web\knta\crt\css\RequestRulesUserCSS.css`

If you have these files customized, back up these files before the upgrade and replace them after the upgrade, otherwise the request UI rules configured by these files will stop working.

Demand Management Configuration Guide

When SQL rule fails to update a field

Error: The guide does not include the information about when SQL rule fails to update a field.

Correction: Add the following note in the "Types of Request Type Rules" section of the guide:

> **Note:** If all fields in a section of a request details page are invisible, SQL-based rule does not work for any fields in the section. It works for all fields in the section when at least one field in the section is visible.

When setFieldEditable UI rule does not work

Error: The guide does not include scenarios when setFieldEditable UI rule does not work.

Correction: Update the note for the table in the section "Important Considerations for Configuring Advanced UI Rules" as follows:

1. setFieldRequired UI rule does not work for the above validations when the **Display** attribute in the field property is set to **No** or the **Visible** attribute in Status Dependencies is set to **No**.

2. setFieldEditable UI rule does not work for the above validations when

- **Display Only** attribute in the field property is set to **Yes**, or

- **Display** attribute in the field property is set to **No**, or

- **Visible** attribute in Status Dependencies is set to **No**, or

- **Editable** attribute in Status Dependencies is set to **No**.

3. setFieldVisible UI rule does not work for the above validations when the **Display** attribute in the field property is set to **No** or the **Visible** attribute in Status Dependencies is set to **No**.

Chapter 7: Deprecation

PPM 9.41 deprecates the following:

- Debugging Console (both the SQL debugging in PPM user interface and the Debugging and Tracing Settings in PPM Workbench)

Send Us Feedback

Let us know how we can improve your experience with the Release Notes.

Send your email to: docteam@hpe.com