

HP Project and Portfolio Management Center

Software Version: 7.0 and 7.1

What's New and What's Changed

Document Release Date: March 2007

Software Release Date: March 2007



Legal Notices

This document, and the accompanying software and other documentation, is protected by U.S. and international copyright laws, and may be used only in accordance with the accompanying license agreement. Features of the software, and of other products and services of Mercury Interactive Corporation, may be covered by one or more of the following patents: United States: 5,511,185; 5,657,438; 5,701,139; 5,870,559; 5,958,008; 5,974,572; 6,137,782; 6,138,157; 6,144,962; 6,205,122; 6,237,006; 6,341,310; 6,360,332; 6,449,739; 6,470,383; 6,477,483; 6,549,944; 6,560,564; 6,564,342; 6,587,969; 6,631,408; 6,631,411; 6,633,912; 6,694,288; 6,738,813; 6,738,933; 6,754,701; 6,792,460 and 6,810,494. Australia: 763468 and 762554. Other patents pending. All rights reserved.

U.S. GOVERNMENT RESTRICTED RIGHTS. This Software Documentation is a “commercial item” as defined at 48 C.F.R. 2.101 (October 1995). In accordance with 48 C.F.R. 12.212 (October 1995), 48 C.F.R. 27.401 through 27.404 and 52.227-14 (June 1987, as amended) and 48 C.F.R. 227.7201 through 227.7204 (June 1995), and any similar provisions in the supplements to Title 48 of the C.F.R. (the “Federal Acquisition Regulation”) of other entities of the U.S. Government, as applicable, all U.S. Government users acquire and may use this Documentation only in accordance with the restricted rights set forth in the license agreement applicable to the Computer Software to which this Documentation relates.

Mercury, Mercury Interactive, the Mercury logo, the Mercury Interactive logo, LoadRunner, WinRunner, SiteScope and TestDirector are trademarks of Mercury Interactive Corporation and may be registered in certain jurisdictions. The absence of a trademark from this list does not constitute a waiver of Mercury's intellectual property rights concerning that trademark.

All other company, brand and product names may be trademarks or registered trademarks of their respective holders. Mercury disclaims any responsibility for specifying which marks are owned by which companies or which organizations.

Intel®, Intel® Itanium®, Intel® Xeon™, and Pentium® are trademarks or registered trademarks of Intel Corporation or its subsidiaries in the United States and other countries.

Java™ is a U.S. trademark of Sun Microsystems, Inc.

Microsoft®, Windows®, and Windows® XP are U.S. registered trademarks of Microsoft Corporation.

Oracle® is a registered U.S. trademark of Oracle Corporation, Redwood City, California.

UNIX® is a registered trademark of The Open Group.

Mercury provides links to external third-party Web sites to help you find supplemental information. Site content and availability may change without notice. Mercury makes no representations or warranties whatsoever as to site content or availability.

© 1997- 2007 Mercury Interactive Corporation. All rights reserved.

Documentation Updates

This manual's title page contains the following identifying information:

- Software version number, which indicates the software version
- Document release date, which changes each time the document is updated
- Software release date, which indicates the release date of this version of the software

To check for recent updates, or to verify that you are using the most recent edition of a document, go to: http://ovweb.external.hp.com/lpe/doc_serv/.

You will also receive updated or new editions if you subscribe to the appropriate product support service. Contact your HP sales representative for details.

Support

Mercury Product Support

You can obtain support information for products formerly produced by Mercury as follows:

- If you work with an HP Software Services Integrator (SVI) partner (www.hp.com/managementsoftware/svi_partner_list), contact your SVI agent.
- If you have an active HP Software support contract, visit the HP Software Support site and use the Self-Solve Knowledge Search to find answers to technical questions.
- For the latest information about support processes and tools available for products formerly produced by Mercury, we encourage you to visit the HP-Mercury Software Support web site at: support.mercury.com.
- Contact your HP Sales Representative if you have additional questions.

HP Software Support

You can visit the HP Software Support web site at www.hp.com/managementsoftware/services.

HP Software online support provides an efficient way to access interactive technical support tools. As a valued support customer, you can benefit by using the support site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract. To find more information about access levels, go to: www.hp.com/managementsoftware/access_level.

To register for an HP Passport ID, go to: www.managementsoftware.hp.com/passport-registration.html.

Table of Contents

List of Tables	ix
Chapter 1: Introduction to Version 7	11
Version 7.0 Highlights.....	12
Version 7.1 Highlights.....	12
Upgrade Impacts	13
Related Information	13
Chapter 2: New Features and Functionality	15
Overview of New Features and Functionality.....	16
HP Project Management	16
Microsoft Project Integration	20
HP Portfolio Management	21
HP Resource Management.....	22
HP Time Management	24
HP Financial Management.....	25
HP Program Management	26
HP Deployment Management.....	26
HP Demand Management.....	27
HP Extensions and Migrators	31
HP Accelerators and Adapters	31
Web Services	31
Standard Interface and PPM Dashboard	32
PPM Workbench Interface	34
Documentation Library	34
Other New Features and Functionality.....	35
Chapter 3: Feature and Functional Impacts.....	37
General Feature and Functional Impact Information.....	38
HP Project Management	38
Microsoft Project Integration	43
HP Portfolio Management	44

HP Resource Management	44
HP Time Management	45
HP Financial Management.....	46
HP Program Management	46
HP Deployment Management.....	47
HP Demand Management.....	47
Web Services	48
Licensing Changes	48
HP Extensions and Migrators	49
HP Accelerators and Adapters	49
Other HP Products.....	50
Chapter 4: Upgrade Impacts	51
General Upgrade Impact Information	52
Customized Solutions.....	52
Cascading Style Sheets and Corporate Logos	52
HP Project Management	53
Project-Level Impacts.....	53
Work Plan Impacts	54
References Impacts	56
Things to Do Before You Upgrade	56
Things to Do After You Upgrade.....	56
Microsoft Project Integration	57
HP Resource Management.....	58
Reporting Meta Layer	58
Data Model Changes	59
Entity Changes.....	61
Request Types and Request Header Types	61
Object Types.....	62
Special Commands	62
Security Groups	66
Access Grants.....	67
Licenses	69
Workflows.....	70
Reports.....	71
Portlets	73
Tokens.....	76
Validations	77

Chapter 5: System Requirements and Configuration Updates	81
Disk Space Requirements	82
server.conf File Changes	82
Oracle Compatibility	91
Server Database	91
HP Object Migrator and HP GL Migrator	103
HP Deployment Management Extension for Oracle E-Business Suite	105
Index	107

List of Tables

Table 4-1	Request types and request header types	61
Table 4-2	Object types	62
Table 4-3	Special commands	62
Table 4-4	Security groups	66
Table 4-5	Access grants.....	67
Table 4-6	Licenses	69
Table 4-7	Workflows.....	70
Table 4-8	Reports.....	71
Table 4-9	Portlets	73
Table 4-10	Tokens.....	76
Table 4-11	Validations	77
Table 5-1	Oracle database and Microsoft Windows platform support for PPM Center versions .	91
Table 5-2	Oracle database and Sun Solaris platform support for PPM Center versions	93
Table 5-3	Oracle database and HP-UX platform support for PPM Center versions	95
Table 5-4	Oracle database and SUSE Linux platform support for PPM Center versions	97
Table 5-5	Oracle database and IBM AIX platform support for PPM Center versions	99
Table 5-6	Oracle database and Red Hat Linux platform support for PPM Center versions.....	101
Table 5-7	Oracle E-Business Suite and Migrator support for PPM Center versions.....	103
Table 5-8	E-Business Suite and extension support for PPM Center versions.....	105

1 Introduction to Version 7

In This Chapter:

- *Version 7.0 Highlights*
 - *Version 7.1 Highlights*
 - *Upgrade Impacts*
 - *Related Information*
-

Version 7.0 Highlights

Version 7.0 of HP Project and Portfolio Management Center (PPM Center) enhances the project lifecycle capabilities and improves the integration in the HP Project Management, HP Resource Management, HP Time Management, and HP Financial Management products.

Building on the strong foundation of prior versions, PPM Center version 7.0 introduces many new capabilities that give IT greater visibility, controls, and flexibility to deliver consistent business outcomes. Highlights include an automated portfolio optimization engine that enables enterprises to specify objectives and constraint criteria (for example, risk, value, alignment, type of investment, ROI, and so forth) to automatically calculate the optimal mix of projects, proposals, and application assets to accelerate the prioritization and approval process. Compliance to enterprise standards for project management and project costing is ensured through powerful project process control and enhanced project types. Enterprise-class project management is now delivered entirely through a zero-client application for greater flexibility. Lastly, there are enhanced connections between top-down planning processes and bottom-up project execution, which enables great flexibility when proposing and executing projects. Details on these topics are provided in [Chapter 2, *New Features and Functionality*, on page 15](#).

This software version also introduces national language support for French, Italian, German, and Spanish.

Version 7.1 Highlights

Version 7.1 of PPM Center further enhances many product areas.

New features and capabilities of version 7.1 include the following. Details on these topics are also provided in [Chapter 2, *New Features and Functionality*, on page 15](#).

- Additional functional enhancements in HP Resource Management, HP Time Management, and HP Project Management
- Enhanced Microsoft® Project integration
- Expanded project task editing capabilities
- National language support is expanded to include Brazilian Portuguese and Korean
- Expanded Web services with improved security and authentication
- Enhanced PPM Dashboard features, customization, and personalization

Upgrade Impacts

The following areas of PPM Center are impacted when upgrading your version 6.0 or 7.0 environment to version 7.1:

- **User experience.** Details of the resulting application impacts and how they might differ from your experiences with other PPM Center versions are described in [Chapter 3, *Feature and Functional Impacts*, on page 37](#).
- **Upgrade process.** Specifics about the impacts of the actual upgrade process are described in [Chapter 4, *Upgrade Impacts*, on page 51](#). Also discussed in this chapter are the changes to the PPM Center entities.
- **System administration.** Items of interest to the PPM Center system administrators or database administrator are detailed in [Chapter 5, *System Requirements and Configuration Updates*, on page 81](#).

Related Information

The following version 7.1 documents provide more in-depth details on several of the impacts of version 7.0 and 7.1:

- *System Administration Guide and Reference*
- *Upgrade Guide*
- *System Requirements and Compatibility Matrix*
- *Creating Portlets and Modules*
- *Customizing the Standard Interface*

2 New Features and Functionality

In This Chapter:

- *Overview of New Features and Functionality*
 - *HP Project Management*
 - *Microsoft Project Integration*
 - *HP Portfolio Management*
 - *HP Resource Management*
 - *HP Time Management*
 - *HP Financial Management*
 - *HP Program Management*
 - *HP Deployment Management*
 - *HP Demand Management*
 - *HP Extensions and Migrators*
 - *HP Accelerators and Adapters*
 - *Web Services*
 - *Standard Interface and PPM Dashboard*
 - *PPM Workbench Interface*
 - *Documentation Library*
 - *Other New Features and Functionality*
-

Overview of New Features and Functionality

The chapter describes the new features and functionality available in versions 7.0 and 7.1. Unless otherwise specified, the enhancements provided in version 7.0 are included in version 7.1 and, for your convenience, the following information has been identified by the version in which the capability was added.

With version 7.0, the change of the name of the product was started—from “PPM Center” to “HP Project and Portfolio Management Center”—and this transformation is complete in version 7.1.

Also, with version 7.1 and the acquisition of Mercury by HP, the corporate identity was changed. This impacts areas such as corporate logo, associated product names, and color palette as well as user interface elements such as field and menu names.

HP Project Management

Version 7.0

HP Project Management has undergone significant functional and architectural changes in this version. Enhancements fall into the following broad categories:

- **Project model changes.** HP Project Management and HP Portfolio Management are more tightly coupled and both are now fully supported in the standard interface—use of the PPM Workbench is no longer required for users to create and manage their projects. Due to the close-knit integration of HP Project Management and HP Portfolio Management (along with HP Demand Management), license requirements that affect the functionality and availability of the features have been streamlined.
- **Project methodology.** Project creation is simplified through the introduction of project types. A project type defines and guides use of HP Project Management, allowing your PMO to quickly define and optionally enforce standards to be used by the organization. Policies defined in the project type are used by projects of that type as defaults, assisting project managers of all levels of expertise set up their projects. The project type can lock down policies to prevent changes to them in individual projects, ensuring consistency of key frameworks within the organization.

Project types can enable or require the use of a specific work plan template, which provides a predefined structure of tasks to be used with the project.

Tasks in the work plan template can be identified as required in order to ensure common reporting across projects.

Project budgets can automatically derive their plan amounts from the staffing levels specified in the project's staffing profile, eliminating the need for duplicate entry and maintenance.

- **New project overview page centralizes interactions for the project.** HP Project Management provides a project overview page that is the central place users go to find information about a project. It acts as a high-level summary as well as a jumping-off point to the different aspects of the project, and is available to all projects, regardless of whether they will use PPM Center's project work planning functionality.

This page provides comprehensive information including the project's health, execution status, detailed characteristics, issues, finances, staffing, and time submissions. The content of the page is dynamically determined based on the information applicable to your project (according to your policies). From this page you can drill into the details of each type of project information. The overall process associated with the project can be seen and updated here, as can any additional project-level information tracked by the organization, including HP Portfolio Management information. You can also access the policy information that governs the project, and change the policies if the project type allows.

Time logged against the project can be approved directly from the overview page as well.

- **Enhanced project health reporting.** The concept of project health has been expanded to capture separate schedule, cost and issue health, and to combine these using a set of weighting factors into an overall project health. The project manager has the option to override the calculated health with an explanation and expiration date
- **Zero-client project and work plan management.** The project work plan has been redesigned to provide a zero-client, scalable way to schedule and manage you work plans, including a new style of interaction for the user.

The project work plan provides the interface used to see the project task structure, including predefined views to help focus attention on different aspects of the work plan. Summary tasks organize the deliverables into related sets for management.

- **Export of work plan to PDF file.** The work plan can be exported to a PDF file for printing or publication.

- **Work plan filters.** Filters are provided to allow the project manager to quickly focus on related sets of information in order to accomplish the task at hand, such as assessing the tasks scheduled to start in the next few weeks.
- **Support for complex predecessors and constraints, plus lead and lag time.** This version expands upon the predecessor and constraint support, including lead and lag time, and constraints on tasks.
- **Schedule warnings.** Schedule warnings are enhanced to help the project manager identify structural inconsistencies or conflicting dependencies within the work plan.
- **Incremental assignments.** Tasks can be assigned to resources incrementally as resources are identified, without losing track of the overall expected effort for the task, thus improving estimation modeling. A new schedule exception is included to identify tasks which are not fully assigned.
- **Increased actuals accuracy.** Each assigned resource's progress on a task is captured individually, increasing the ease of use as well as data accuracy for tasks assigned to multiple resources.
- **Simplified task notifications.** The setup and use of task notifications has been simplified, including an inheritance model which allows organizations to take advantage of this powerful tool with minimal effort. Notifications can also be defined as part of a work plan template, further reducing maintenance.
- **Tighter integration with HP Time Management.** HP Project Management seamlessly integrates with HP Time Management, allowing resources to enter all of their progress information in the interface (My Tasks or their time sheet) most comfortable for them. In addition, time logged against a project by non-assigned resources is now visible by resource in the work plan. Integration with HP Time Management is addressed in more detail in *HP Time Management on page 24*.

Version 7.1

New features in version 7.1 focus on improving HP Project Management efficiency and incremental capabilities, including re-establishing some functionality that was available in earlier versions of the product. For example:

- Risks and scope changes can be viewed and created directly from the project overview page
- Common task editing activities are made significantly more efficient for the project manager through the use of the following:
 - The Quick Edit page, allowing batch editing of a selection of tasks from a work plan
 - The Enter Task Actuals page, allowing batch entry of resource actuals
 - Mass editing functions within the work plan, allowing the project manager to apply the same change to multiple tasks in a single action
- Users can print or export a PDF file of the project overview page
- Projects can be deleted when they are in error. Project delete can also delete projects with actuals; however, this functionality requires an additional access grant. In the latter case, project delete also detaches references to the deleted project.
- Projects can be changed from capitalized to operating mid-project.
- The Project Timelines portlet is added to show an overview of the timelines for a set of projects.
- Project types can be migrated between PPM Center instances, including the ability to enforce the policy changes

The following version 6.0 features and functionality have been re-introduced in version 7.1:

- Template utilization for planning project phases as well as template usage controls
- Ability to define blocking relationships between work plan tasks and HP Demand Management requests

Microsoft Project Integration

Version 7.0

With version 7.0, PPM Center and Microsoft Project interactions (such as synchronization of common data) are driven from Microsoft Project using the new Plug-in for PPM. The integration settings have been improved by centralizing them in the project type. Control has been expanded to include enhanced integration modes for actuals, rules for dynamically mapping resource names, and numerous other improvements.

The new Plug-in for PPM includes a new menu item, plus three new buttons on the toolbar. The functions provided by this Plug-in for PPM include all aspects of project integration activities, as well as quick links to key PPM Center functions.

Mapping resources is now interactive and can be done without leaving Microsoft Project. Resources are automatically mapped; however, when resources cannot be mapped, mapping can be completed using the list of project participants that is displayed—should this list prove inadequate, searching for resources is also an option.

To allow for much easier identification of changes and their influences, acceptance of actuals from PPM Center now incorporates a comparison display of old and new values, an indicator of whether a task's actuals were directly changed or indirectly impacted.

Feedback regarding integration activity is improved through the use of progress bars, estimates of time remaining, and improved and exportable error and warning messages.

Version 7.1

Projects which are stored within Microsoft Project Server (“server-based projects”) can be integrated with PPM Center in the same manner as file-based projects, through the Microsoft Project client using the Plug-in for PPM.

Also included is the ability to recover from cases where a user errantly deletes a task in Microsoft Project that was either required by a PPM Center template or has actuals in PPM Center.

Users are prompted to integrate their plans with PPM Center when saving them in Microsoft Project, assisting the project managers in keeping their PPM Center work plans up-to-date.

HP Portfolio Management

Version 7.0

In addition to the tighter integration with HP Project Management, HP Portfolio Management has been enhanced to include dependencies between proposals to help determine the ideal mix within your portfolio scenario comparisons. The rich collection of visualizations continue to highlight various portfolio options and their alignment to business objectives.

The new optional portfolio optimization functionality automatically analyzes thousands of possible combinations of proposals, projects, and assets to determine the optimal mix based on various weighting factors. The optimization generates an efficient frontier graph that shows the highest levels of performance achievable for various budget levels.

Version 7.1

Enhancements for HP Portfolio Management include the following:

- Categorization of effort logged against an asset by activity
- Roll up of actual costs for actual labor costs to the asset budget

HP Resource Management

Version 7.0

In HP Resource Management, the resource pool and resource calendar are now more tightly coupled to eliminate duplication of effort—resource pool updates to a resource’s calendar are automatically reflected in the capacity shown in all the resource pools where the resource is assigned.

Resource pools now better separate named and unnamed head count, where unnamed resources represent pending contractor or to-be-hired positions.

Resources can be present in multiple resource pools, yet capacity is now constrained to limit a resource’s availability to 100%, thereby avoiding over utilization or over commitment of a resource.

Resource pool roll-ups are no longer bound to the organization structure—resource pools can be structured to conform to other capacity planning models.

A “role” catalog has been added that complements the “skill” catalog. Collectively, these catalogs better describe the capabilities needed when requesting resources or defining staffing profile or work plan demand. Roles typically correspond to job titles or positions within the organization whereas skills define the proficiencies associated with a position, task, request, or similar type of demand. Consequently, a combination of role and skill can be used to describe a resource requirement, such as role of DBA with skills of Oracle level 4, SQL level 5.

The processes surrounding resources and their allocation are tightly integrated: resource managers are specified for each resource pool, project managers create staffing profiles, only owners of the resource pool can assign resources to staffing profiles, and project managers can only assign tasks to resources included in their staffing profile or their dedicated resource pool. When there are small teams, the project manager often serves as the resource manager, in which case they can assign their own resources to staffing profiles or tasks.

The concept of “soft booking” and resource requests has been introduced thereby allowing more staffing flexibility while communicating awareness of resources requirements, yet indicating a limited level of commitment to a project.

The Analyze Resource portlet has been enhanced to include a breakdown by role. Furthermore, the portlet identifies committed, soft-booked, and unmet demand versus resource pool capacity.

Expanded time periods (weeks, months, quarters, and years) are now included for resource pools and staffing profile. Resource estimation is no longer limited to full-time equivalents (FTE)—you can now enter your requirements in hours.

The staffing profile statuses have been streamlined to expedite planning and existing staffing profiles can be copied to new create staffing profiles for similar projects. Additionally, project staffing profiles can now be baselined at various stages throughout their lifecycle.

Version 7.1

Enhancements for HP Resource Management include the following:

- Batch update for resources for the following kinds of scenarios:
 - Find all the resources in organization unit A and change their time sheet policy from X to Y
 - Resource pool B has completed their annual competency review and the role for most resources should be changed from Q to P
- New Resource Request portlet
- Export the details of the Compare to Work Plan view of the staffing profile to a Microsoft Excel file
- Ability to conduct planning in “person days” in the staffing profile and resource pool
- Filter the Resource Usage view to show only over or under allocation exceptions, as well as views filtered by weeks and months in addition to days
- Show actuals in the Resource Usage view to perform comparisons against planned and actuals
- The external load for the resource has been added to the Resource Usage page

HP Time Management

Version 7.0

HP Time Management includes several important enhancements aimed at improving the ease and accuracy of time reporting. The first enhancement is tighter integration with HP Project Management. Project type settings, controlling how and from whom project actuals are collected, are respected in HP Time Management. Also, task status information (that is, estimated remaining effort) formerly collected only in the My Tasks portlet is now available on time sheets. (Updates made in one are reflected in the other.) The second enhancement is the My Items/Suggested Items feature. The Suggested Items list automatically supplies likely candidates for time sheet lines, simplifying the process of identifying work targets. Additionally, Suggested Items can be extended to meet organizational needs. Resources can also keep track of commonly used work items in a My Items list, from which items can be easily added to any time sheet.

Time and actuals collection controls include the ability to allow project resources, in addition to assigned resources, to charge time against the project. Another new, configurable, control permits time to be charged after a task has been completed.

Approval at the time sheet line level is now supported, meaning that multiple approvers can act on the same time sheet (when a resource is assigned to multiple projects). For your convenience, an auto-approval feature has also been provided.

Resource settings and activity definitions have been moved to the standard interface. Use of the PPM Workbench is limited to time sheet policies, override rules, and charge codes.

Version 7.1

Enhancements for HP Time Management include:

- Microsoft Excel export capability for the Time Sheet Approvals portlet
- Ability to add lines to a time sheet that has already been submitted
- Addition of time sheet line cost information to the following reports
 - Time Sheet Summary report
 - Actual Time Summary report
- Ability to define activities specifically for PFM Assets, facilitating time collection for assets

HP Financial Management

Version 7.0

Version 7.0 of HP Financial Management includes enhanced cost-rate rules that allow you to set the rate for a work item based on resource attributes, type of work, or effective dates. Many of the features previously described (such as the automatic creation of budgets from staffing profiles) also apply to this product.

Labor costs are more accurately tracked by utilizing the new, flexible, rule-based hourly cost rate feature that includes a variety of factors such as role, region, time period, department, and resource, and whose order of precedence is configurable.

The roll up of costs from the time sheet to the project and the project tasks to the summary tasks, and finally the project to the budget, all happen “behind the scenes” (about once an hour for projects that have changed). This speeds up the saving of a project as well as improving the overall system performance while still providing near real-time costing information.

Version 7.1

Enhancements for HP Financial Management include the following:

- The option to only roll up labor costs to a project budget allowing manual entry of non-labor costs directly on the budget
- Export the details of a budget to a Microsoft Excel file
- Improved filtering in cost rules tables
- Performance enhancements to fully support resource level cost rules
- Budgets can be changed from capitalized to operating

HP Program Management

Version 7.0

In addition to supporting the new projects in HP Program Management, the health for issues, risks, and scope changes are now determined using a weighting system.

Version 7.1

No new features or functionality are included in this version.

HP Deployment Management

Version 7.0

To reduce any potential confusion with an enterprise's "change management" processes and procedures, the names for the Change Management product and related Extensions have been changed to Deployment Management.

The following features that have been added in version 6.0 Service Packs are included in this version:

- The ability to add a link to the web UI that opens the package execution log [SP12]
- The ability to set whether a package user data field is editable after the package was submitted [SP12]
- The enhanced the `ksc_connect` command has the ability to work with environment groups and at least one mode [SP12]

HP Demand Management

Version 7.0

Version 7.0 supports concurrent edits of a request. In version 6.0 (SP5 or earlier), if two users were editing a request at the same time, the changes were saved only for the first user to click the **Save** button.

With this new functionality, whenever a user clicks the **Save** button, the changes are always saved or the user is advised of the fields requiring resubmission of their data.

Version 7.1

To facilitate automated processing of HP Demand Management requests, the `ksc_copy_request` and `ksc_move_request_workflow` special commands have been added.

■ `ksc_copy_request`

This special command will make a copy of a specified request automatically, with no user intervention (as distinct from the “create request” workflow command which raises the standard request form in the user interface for the user to manually fill in and submit).

The `ksc_copy_request` parameters are:

- **FROM_REQUEST_ID.** The ID of the request from which to make the copy. This is a required parameter, and should default to the token for the ID of the current request (“[REQ.REQUEST_ID]”).
- **REQUEST_TYPE_ID.** The ID of the request type to use when creating the new request. This is an optional parameter, and should be specified only if it is desired that the new request be of a request type different than that of the request being copied (specified by the `FROM_REQUEST_ID` parameter). If this parameter is left blank, then the new request created by this special command will be of the same request type as the one specified by the `FROM_REQUEST_ID` parameter.
- **WORKFLOW_ID.** The ID of the workflow to use when creating the new request. This is an optional parameter, and should be NULL by default.
- **COPY_FIELDS.** Valid arguments are “Y” or “N.” If “Y” then copy the values of every field whose token maps to a token in the new request. Default value is “Y.”

- **COPY_NOTES.** Valid arguments are “Y” or “N.” If “Y” then copy all the notes from the original request to the new request. The default value is “N” since it is reasoned that the notes from the original request are typically not relevant for the new request, and thus will not be copied in most cases.
- **CREATE_REFERENCE.** Valid arguments are “Y” or “N.” If “Y” then create a reference between the new request and the original request. The default value is “Y.”
- **REFERENCE_RELATIONSHIP.** Specifies the relationship of the reference (if CREATE_REFERENCE=Y, otherwise this parameter is ignored). Valid values (case-insensitive) are:
 - Child of this Request (this is the default value)
 - Related to this Request
 - Parent of this Request
 - Duplicate Request
 - Original of Duplicate Requests
 - Successor
 - Predecessor
- **SUBMIT.** Valid arguments are “Y” or “N.” If “Y,” then submit the new request. The default value is “Y.”
- **STATUS_NAME.** The status name to set for the new request. The default value is NULL and typical configurations will want to use the initial status name specified by the new request’s type configurations. Note that if a status name is provided, its value should be set after the request is submitted (if SUBMIT=Y).

In addition, when the `ksc_copy_request` special command is executed, the resulting ID of the new request must be made available so that it can be captured and used in subsequent commands. This can follow similar logic as the `ksc_set` command, in which you can specify a “temporary token” and assign a value to it. In this case, a temporary token named “[COPIED_REQUEST_ID]” will hold the ID of the new request, and will be available within the same execution context. If it is necessary to persist this new request ID somewhere on the existing request driving the commands, then it should be stored to a request field using the `ksc_store` special command.

- **ksc_move_request_workflow**

This special command will cause a workflow event to occur on the specified request.

The **ksc_move_request_workflow** parameters are:

- **REQUEST_ID.** The ID of the request to take action on. This is a required parameter, and should default to the token for the ID of the current request (“[REQ.REQUEST_ID]”).
- **FROM_WORKFLOW_STEP_SEQ.** The sequence number of the step to take action on. This is a required parameter, and should default to the token for the active step of the current request (“[WFS.STEP_NO]”).
- **EVENT_NAME.** The type of workflow event to kick off. This is a required parameter. The following events are supported (same as those supported by the workflow transition database open interface, which forms the basis for this command):
 - **INSTANCE_SET_CREATE.** For request submission.
 - **APPROVAL_VOTE.** For decision step. If this event is specified, then the **RESULT_VISIBLE_VALUE** parameter should also be specified to indicate which of the step’s outcomes to choose.
 - **APPROVAL_DELEGATE.** For decision step being delegated. If this event is specified, then the **DELEGATE_TO_USERNAME** parameter should also be provided.
 - **EXECUTION_EXECUTE.** For execution step.
 - **EXECUTION_SCHEDULE.** For execution step being scheduled. If this event is specified, then the **SCHEDULE_DATE** parameter should also be provided.
 - **BYPASS_EXECUTION.** For execution step being bypassed. If this event is specified, then the **RESULT_VISIBLE_VALUE** parameter should also be specified to indicate which result value to override the execution step with.
 - **RESULT_OVERRIDE.** For an active step being overridden. If this event is specified, then the **RESULT_VISIBLE_VALUE** parameter should also be specified to indicate which of the step’s outcomes to choose.
 - **INSTANCE_SET_CANCEL.** For cancelling the request.

- **FORCE_TRANSITION.** For forcing a transition from the step specified in FROM_WORKFLOW_STEP_SEQ to an arbitrary destination step, which may not have a valid transition in the workflow configuration. If this event is specified, then both the RESULT_VISIBLE_VALUE and TO_WORKFLOW_STEP_SEQ parameters must also be specified, to indicate the result value shown for the source step, and which step should be the destination of the forced transition, respectively.
- **RESULT_VISIBLE_VALUE.** The visible value of the desired result value for the workflow action, if applicable. This is the value the user would choose in the user interface while taking action on a workflow, and should default to NULL. Most of the events require the result visible value to be specified (see the EVENT_NAME for specifics).
- **SCHEDULE_DATE.** The date to schedule an execution event. This should default to NULL, and is only used with EXECUTION_SCHEDULE events (otherwise it is ignored).
- **DELEGATE_TO_USER_ID.** The ID of the user to whom the current user's approval vote should be delegated. This should default to NULL, and is only used with APPROVAL_DELEGATE events (otherwise it is ignored).
- **TO_WORKFLOW_STEP_SEQ.** The sequence number of the desired step to transition to. This should default to NULL, and is only used with FORCE_TRANSITION events (otherwise it is ignored).

HP Extensions and Migrators

Versions 7.0 and 7.1

No new features or functionality were added for the Migrators during the releases of these software versions—use version 6.0 of these products.

For the Extensions, the versions were updated to 7.0.0 and support was added for ECC 6.0.0 for NetWeaver 7.00 in the HP Deployment Management Extension for SAP Solutions.

HP Accelerators and Adapters

Versions 7.0 and 7.1

Check with your sales representative or contact HP-Mercury support (support.Mercury.com) for the features enabled for the HP Accelerator and Adapter products usable with these versions.

Web Services

Version 7.0

No new Web services have been provided in this version.

Version 7.1

Existing Web services are being deprecated. Web service support is provided for the following PPM Center applications:

- **HP Demand Management.** Operations to create, read, update, and delete requests are included. These are updates of the versions 6.0 and 7.0 Web services using the new architecture.
- **HP Financial Management.** Operations include the ability to create, read, update, and delete cost rules. These Web service were not available in versions 6.0 and 7.0.
- **HP Project Management.** Operations include the ability to create and update projects, create blank work plans, create work plans from templates, add to a work plan, and import tasks into an existing work plan as well as to log resource actuals against tasks. These Web services were not available in either version 6.0 or 7.0.

- **HP Resource Management.** Operations include the ability to create, read, update, and delete resource pools and services for the manipulation of resource pool distributions. These Web services were not available in either version 6.0 or 7.0.
- **HP Time Management.** The `getActualTime` operation allows retrieval of time logged against tasks, requests, and so forth for a given time period. This is an update of the version 6.0 Web service using the new architecture. This Web service was not available in version 7.0.

Infrastructural highlights include:

- Based on the latest Axis2 technology
- Complies with WS-I standards
- Includes support for WS-Security UsernameToken profiles and the encryption of SOAP headers. Basic HTTP authentication is also supported.
- Improved auditing utilizing SOAP headers to pass audit information together with the Web service operation request

Standard Interface and PPM Dashboard

Version 7.0

This version includes the following enhancements to the standard interface and the PPM Dashboard application:

- The new role-based menu organization provides a more focused approach to application navigation.
- A drop-down menu, instead of tabs, allows for easy access to PPM Dashboard pages.
- The ability to drill down to multiple portlets supplies access to more data from a single portlet.
- PPM Dashboard pages can now be exported to PDF files.
- Portlet definition preview has been enhanced.

Note that most of these features are available in version 6.0 SP11 (or later).

Version 7.1

This version includes the following enhancements to the PPM Dashboard application:

- Module creation, sharing, and usage enhancements include:
 - New use interface for module creation and configuration
 - Module sharing instead of the publish or distribution model
 - Access controls provided on a per-module basis
 - Comments can be added to modules
 - Expanded filtering capabilities
 - Drill-down pages can have unique titles
 - The width of drill-to pages can be controlled
- Portlet View page enhancements include:
 - Drag and drop in portlet layout
 - Enhanced page navigation
 - Page rotation
 - Easy to use buttons
 - Performance improvements
 - Configurable drill-to capability
 - Chart portlet data exposure
- Performance improvements include:
 - Replacement of module distribution and publication with Private and Shared pages
 - Personalization and module configuration changes are incrementally saved
- Personalization enhancements include:
 - New user interface including asset tree composed of page groups, pages, portlets, and modules
 - Preview for portlets and pages
 - Copy and paste capability for portlets, pages, and modules
- PDF export capability has been enhanced
- Instance-wide control of color palette for Java™-based portlets

PPM Workbench Interface

Version 7.0

The following enhancements have been made to the PPM Workbench interface:

- The look and feel of the PPM Workbench interface has been updated to improve identification of window elements, such as buttons and tabs.
- The new desktop-based shortcut allows you to open the PPM Workbench without logging into the standard interface.

Version 7.1

No substantive changes were made in this version.

Documentation Library

Version 7.0

The documentation Library page has been enhanced to include:

- **Role-based view of documents.** The document list can be viewed based on role. When you select a role from the pre-defined list, you are shown the list of documents relevant to the goals associated with that role.
- **Custom document support.** Site-specific documents, relating to your company's use of PPM Center, can be hosted on the PPM Server and accessed from the Documentation Library page.
- **Master Index.** The *Master Index* document provides a consolidated index of all of the product documents (excluding additional HP products, such as Extensions and Migrators).
- **Change notification.** Documents added or updated after the initial version of the product may include the display of publication or update dates. If the dates are within 30 days of the clients' system date, they are annotated as "New" to alert users that new information is available.
- **Additional HP products.** Documentation links for additional HP products, such as Extensions and Migrators, are available from the Documentation Library page only if you have those products and documents installed.

As with all other versions of PPM Center, the documentation Library is available from the standard interface or the PPM Workbench by navigating to **Product Information > Library**.

Version 7.1

The following changes have been made to the documentation suite:

- The *Getting Started* guide has been re-introduced.
- Due to the differences in the document's goals and audience, the *Configuring the Standard Interface* document has been separated into the following guides:
 - *Customizing the Standard Interface*
 - *Creating Portlets and Modules*

Other New Features and Functionality

Version 7.0

The new query builder feature provides a way to create a custom search query for requests of any type. You can create a search by defining search terms using mathematical operators (=, |=, <, >, IN) and combining multiple search terms with logical operators (AND, OR, NOT). You can access the query builder by clicking the **Query Builder** button on the Search page for requests of any type. [SP12]

Version 7.1

The Request Browser page allows a user can view a set of requests that are grouped hierarchically based on criteria that the user specifies. The user can drill down into subgroupings of the requests. The Request Browser can be used for requests of a single type at a given time. However, each set of saved preferences can refer to a different request type. [SP13]

This version complies with the revised dates of Daylight Saving Time (DST) as outlined in the U.S. Energy Policy Act of 2005.

3 Feature and Functional Impacts

In This Chapter:

- *General Feature and Functional Impact Information*
 - *HP Project Management*
 - *Microsoft Project Integration*
 - *HP Portfolio Management*
 - *HP Resource Management*
 - *HP Time Management*
 - *HP Financial Management*
 - *HP Program Management*
 - *HP Deployment Management*
 - *HP Demand Management*
 - *Web Services*
 - *Licensing Changes*
 - *HP Extensions and Migrators*
 - *HP Accelerators and Adapters*
 - *Other HP Products*
-

General Feature and Functional Impact Information

This chapter compares the changes in behavior and user interaction of the new features and functions in version 7 to those in version 6.0. Unless otherwise specified, feature and functional impact introduced in version 7.0 spans into version 7.1. For your convenience, this information has been identified by the version in which the impact occurred.

HP Project Management

Version 7.0

For this version, the enhancements have impacted the following areas:

- **Projects.** Each project includes a project process workflow and a set of project-level data fields. One workflow is provided which models a simple project process. A more complex process is provided as part of the Best Practices bundle for HP Portfolio Management.

The project overview page is available for all projects, not just those which have work plans. The overview page is self-configuring rather than being driven by explicit user-based settings, and as such incorporation of custom portlets into the overview page is no longer allowed.

A project can have only one staffing profile associated with it; however, the staffing profile can be baselined.

Copying of projects is no longer supported.

- **Methodology.** Each project is associated with a project type on creation. The project type specifies a set of policies which govern how the project should be managed and how it will behave in PPM Center. The project type determines which process and project-level fields will be used for the project, and can determine which work plan template is used with the project.

In version 6.0, work plan templates provided a starting task structure for a project, as well as default settings for management of the work plan. In version 7.0, work plan templates provide the task structure only, with no associated settings. All settings are now contained in project type policies. Several policies and policy settings have been added that extend beyond work plan management.

- **Work Plans.** Work plans belong to projects, and cannot belong to any other entities. Project work plans have changed in a number of ways relating to plan definition:
 - “Sub-projects” are no longer manipulated as quasi-projects. This functionality has been replaced by summary tasks whose tasks are viewed within the project work plan itself.
 - The work plan interface has moved to the standard interface rather than the PPM Workbench. The work plan page is read-only and optimized for performance and scalability. The user can control the number of tasks displayed at a given time in the page and can select from a number of different data views. Filters are provided to help the project manager or other user focus on the tasks of interest to them.
 - Tasks are edited and saved in the Task Details page on a task-by-task basis. This page, along with new filtering capabilities in the work plan, allows for quick navigation between tasks to facilitate editing.
 - Only users named as project managers can edit task information on the work plan. Users that were managing portions of a work plan, such as a phase, will need to be made project managers in order to have editing privileges.
 - Scheduled effort can be automatically calculated based on the assigned resources, or can be manually set per resource. The project manager can set a known total effort for a task and then incrementally assign resources to the task without losing the overall effort amount.
 - The work plan is always scheduled in its entirety, and the resulting plan is immediately saved. Scheduling of portions of the plan is not allowed.
 - Task and project (summary task) user data are consolidated into task user data. Field-level security controls are not supported.
 - Additional project policy settings are added, and are defaulted based on existing settings as applicable, or are left turned off.
 - Audited field changes are no longer incorporated into task notes. Instead, the task’s or work plan’s audit trail is available for viewing or export to excel.
 - The Baseline Comparison Report replaces the version 6.0 Schedule Change Report, and is enhanced to allow comparison of additional fields. The side-by-side comparison view in the work plan is eliminated, as are the field settings that accompanied it.

- Project gantt generation and several reports have been replaced by the ability to export the work plan to a PDF file
- Tasks can be Ready, In Progress or Complete regardless of whether their parent task is Active. The “New” status is eliminated for Tasks, although it is retained as “In Planning” for summary tasks.

Work plans have also been changed in ways that impact task resources, time capture, or actuals entry:

- In version 6.0, project managers could identify some fields as enterable by the project manager only. In this version, actuals fields tracked on the project are always enterable by resources on the project.
- The relationship between the different pieces of actuals information is more strongly enforced. Smart defaulting is provided to assist users during actuals entry.
- Actuals are captured per resource per task, rather than at the task level. Each resource can declare their individual progress on the task and the application will combine this information to produce task-level data.
- Resources who normally enter time sheets can enter all related actuals directly on the time sheet via the Project Details tab. Similarly, resources entering actuals through the My Tasks portlet will be able to provide time breakdown in a format required by their time sheet
- Notifications have been simplified. A new inheritance model allows the project manager to select from pre-defined notifications at a high level in the work plan, say at the phase level, and have all the tasks within the phase use the notifications. Customization of notifications are no longer supported.

- **Reports.** The following reports have been decommissioned and are no longer supported. In general, the user can achieve the same functionality by filtering the work plan and exporting the results to a PDF file:
 - Project Detail Report. Use the printable view of the project instead (version 7.1). Currently there is no report to list project policies.
 - Project Exception Detail Report. Use the drill-in from the project overview page instead
 - Project Critical Path
 - Project Resource Report
 - Project Status Detail Report
 - Project Summary Report
 - Project Task Assignment Report
 - Project Template Detail Report
- **Portlets.** The following portlets have been decommissioned or modified:
 - Project Summary Pie Chart. This portlet is no longer available. A new portlet, Project Health Pie Chart, is added to reflect project-level information
 - Project List portlet becomes the Summary Task List portlet
- **Functionality.** The following functionality has been decommissioned and is no longer supported:
 - Roll up of task user data
 - Work plan template custom fields
 - Action items on tasks
 - A “Bypassed” task status. The “Cancelled” status should be used instead.
 - Access to Baseline Comparison report through Project Summary page.
 - Baseline comparison integrated into the work plan page. Instead the Baseline Comparison Report should be used.
 - The request updates task relationship between work plan tasks and HP Demand Management requests

- Department, Confidence, Estimated Remaining Duration attributes of tasks
- Specification of Resource Groups associated with specific tasks
- Project (work plan) Team. The staffing profile should be used to model the resources associated with the project

Version 7.1

The following functionality was temporarily unavailable in version 7.0 but returns in version 7.1:

- Project deletion.
- Detaching of staffing profiles and budgets from projects.
- Predecessor (“blocking”) relationships between work plan tasks and HP Demand Management requests.
- Importing work plan templates into an existing work plan.
- Usage controls for work plan templates.
- Editing information for multiple tasks before saving changes. Two batch-style screens are provided to allow editing of multiple tasks prior to saving.

Microsoft Project Integration

Version 7.0

With version 7.0, Microsoft Project integration is now driven from within Microsoft Project using the client Plug-in for PPM. All activities, such as integration, error logging, and resource mappings are controlled and initiated from Microsoft Project.

Additional settings are provided in HP Project Management to control the storage of key PPM Center data within Microsoft Project, as well as Microsoft Project integration settings.

Version 7.0 includes stronger enforcement of data changes in PPM Center, and deletion of tasks with actuals or which were required by a work plan template is not allowed, even when Microsoft Project is used to manage the work plan schedule information in a shared mode. The Plug-in for PPM will automatically back up the project to a file when the schedule is sent to HP Project Management, as a fail-safe in case tasks are errantly removed from the plan.

Version 7.1

Project which are stored within Microsoft Project Server (“server-based projects”) can be integrated with PPM Center in the same manner as file-based projects, through the Microsoft Project client using the Plug-in for PPM.

Tasks which have been errantly deleted within Microsoft Project can now be recovered when sending the work plan information to HP Project Management when Microsoft Project owns the schedule data. The user will be prompted to re-link the tasks between the plans when this occurs.

When the schedule information is controlled by Microsoft Project, the user will be prompted to integrate the plan with PPM Center when saving the plan in Microsoft Project. This assists the project manager in keeping the work plan information up to date in PPM Center.

HP Portfolio Management

Version 7.0

Since project plans are no longer separate entities, there is no way to create a work plan without creating a project. Therefore, linking a work plan without linking a full project to other entities is no longer possible and the following features are no longer available:

- Associate Work Plan with Proposal
- Associate Work Plan with Asset

In version 6.0, proposals and projects in HP Portfolio Management were allowed to share budgets and staffing profiles. As a result, it was possible to have the project plan actuals roll up to the budget and staffing profile shown on the proposal. Due to the enhanced integration between HP Portfolio Management and HP Project Management, the following functions are no longer available:

- Roll up actuals from Work Plan to Proposal Budget
- Roll up actuals from Work Plan to Proposal Staffing Profile

Version 7.1

Other than enhanced functionality, there are no appreciable user impacts.

HP Resource Management

Version 7.0

The following pages have been removed; however, these views still exist as portlets:

- Analyze Assignment Load page [replaced by Analyze Assignment Load portlet]
- Analyze Resource Pools page [replaced by Analyze Resource Pool portlet]

The following page has been removed; however, it is available as a drill-to page from the Staffing Profile page.

- Project Assignments to Staffing Profile Lines Comparison page

Version 7.1

Other than enhanced functionality, there are no appreciable user impacts.

HP Time Management

Version 7.0

The following changes have been made in HP Time Management:

- You can set up HP Time Management override rules (similar to cost rate rules in version 7.0 HP Financial Management).
- In version 6.0, HP Time Management separately referred to logging time against “Projects” and “Tasks.” Due to terminology adjustments in version 7.0, these are referred to jointly as “Project/Task” in the interface. Therefore, the “Project” work item choice has been removed; but, tracking time at the project level is still supported.
- To improve system performance, time sheet policy checks are now assessed only when a time sheets is saved instead of real-time.
- The number of time periods displayed when managing time sheets is now configurable using `server.conf` file parameters.
- The changes in project settings that control time logging may make some override rules or work allocations unnecessary.
- Version 7.0 introduces time sheet line user data, a formalized custom field framework for time sheet lines. This replaces the previous custom field solution.

In version 6.0, a Program Management license was required for users to access the work plan or for resources to log time through My Tasks. Someone could log time in for the users, but no other actuals-related could be entered for that resource.

As of version 7.0, a Time Management license is required for each resource that will log time sheets, even if someone else actually does the entry. All actuals data, not just effort, can be entered, and the user can alternatively use the My Tasks portlet rather than only the time sheet.

Version 7.1

User data for existing custom time sheet lines is preserved during the upgrade process; however, new user data configurations must be created for the corresponding data elements in order to maintain visibility/editability of that data in the time sheet user interface.

The **Add Lines** button remains enabled after a time sheet is submitted so that users can more easily add a new line or update an existing line.

The Actual Time Summary report has been rewritten and enhanced. Use of the earlier version should be discontinued and customized reports based on the earlier version should be re-implemented.

HP Financial Management

Version 7.0

The Project Budget and Staffing Profile versus Actuals Portlet was removed from the product.

Earned Value analysis metrics (EV, PV, CPI, and SPI) are no longer computed at the program level. This is because computing these metrics at the program level can easily mask issues that exist in the individual projects that are a part of the program. Consequently, the Cumulative Cost Metrics and Current Cost Metrics portlet for programs are no longer available; however, the cost health and earned value of the program's projects are still visible on the cost tab of the program. A separate cost health for programs is also no longer available.

Version 7.1

Cost rate rules are now cost rules. Carefully review your cost rules to ensure the expected behavior.

HP Program Management

Version 7.0

Due to the tightly coupled relationships between the HP products in version 7.0, resource requests and request for a program are no longer needed. Also, programs can no longer be associated with staffing profiles or resource pools and earned value analysis is no longer available at the program level.

See *HP Financial Management* for impacts relating to earned value computations.

The following changes have also occurred:

- The EV analysis tab brings you to the project and from there you can open project level EV analysis.

- Issues can now be logged directly against the program using the Program Issue request type. Issues, risks, and scope changes can still be logged against projects in the program and will roll up for program-level visibility.
- The program creation wizard has been removed and program creation is simplified.
- Issue, risk, and scope change health calculations are now driven using a weighting system rather than a threshold based solely on the number of requests logged.

Version 7.1

There are no substantive changes for HP Program Management in this version.

HP Deployment Management

Version 7.0

Other than the name change for this product (from Change Management to Deployment Management) and the addition of a report, there are no functional impacts.

Version 7.1

There are no appreciable changes.

HP Demand Management

Version 7.0

The ability to select and link to a resource pool from a request is no longer supported.

The task integration relationship is no longer driven by requests.

Version 7.1

There are no appreciable changes.

Web Services

Version 7.0

The HP Demand Management PENDING_STATUS_CHANGE background service is no longer supported.

The special commands are no longer available from the command builder.

None of the HP Time Management Web services are supported.

Version 7.1

Since all existing Web services are being deprecated, users should convert their applications to their replacements as soon as practical.

Licensing Changes

Version 7.0

Each user submitting a time sheet (through HP Time Management) is now required to have a Time Management license. Users with a Time Management license can now use the My Tasks portlet. Also, those users have access to the task details page [SP10].

Users do not need a Demand Management license to log issues, risks, or scope change requests against a project; however, they do need a Project Management license.

Users are not required to have a Project Management license in order to access project level information. An HP Time Management user (who does not have a Project Management license) assigned on a work plan is able to see (and enter actuals against) his tasks in the My Tasks portlet. In addition, HP Time Management users are able to drill into the task “detail view” screen from My Tasks portlet so they can view more complete details about the tasks. However, HP Time Management users cannot access the main work planning interfaces (that is, view work plans, add tasks, edit tasks, and so forth).

Version 7.1

Use of the optional portfolio optimizer requires the Portfolio Optimization license.

HP Extensions and Migrators

Versions 7.0 and 7.1

The name of the Extension products has been changed from Change Management to Deployment Management.

The following Extensions are no longer supported:

- Mercury Change Management Extension for Siebel eBusiness Applications
- Mercury Change Management Extension for Databases
- Mercury Change Management Extension for E-Commerce Technologies

Version 6.0 Migrators are compatible with version 7. The Extensions have been updated to version 7.0.0 and 7.1.0.

For the HP Deployment Management Extension for SAP Solutions, the three version 6.0 Service Packs have been incorporated into the latest HP Deployment Management Extension for SAP Solutions release. Also, ECC 6.0.0 for NetWeaver 7.00 support was added to this Extension.

For HP Deployment Management Extension for Oracle E-Business Suite and HP Deployment Management Extension for Oracle Technology, Oracle 10.x is no longer supported in version 7.1.0.

HP Accelerators and Adapters

Versions 7.0 and 7.1

Check with your sales representative or contact HP-Mercury support (support.Mercury.com) for the status and availability of the HP Accelerator and Adapter products.

Other HP Products

To determine the usability of other HP products (such as HP Quality Center, HP Application Mapping, and HP Service Desk) with version 7.0 or 7.1, consult one of the following:

- The documentation accompanying that product
- Your sales representative
- HP-Mercury support (support.Mercury.com)

4 Upgrade Impacts

In This Chapter:

- *General Upgrade Impact Information*
 - *Customized Solutions*
 - *Cascading Style Sheets and Corporate Logos*
 - *HP Project Management*
 - *Project-Level Impacts*
 - *Work Plan Impacts*
 - *References Impacts*
 - *Things to Do Before You Upgrade*
 - *Things to Do After You Upgrade*
 - *Microsoft Project Integration*
 - *HP Resource Management*
 - *Reporting Meta Layer*
 - *Data Model Changes*
 - *Entity Changes*
 - *Request Types and Request Header Types*
 - *Object Types*
 - *Special Commands*
 - *Security Groups*
 - *Access Grants*
 - *Licenses*
 - *Workflows*
 - *Reports*
 - *Portlets*
 - *Tokens*
 - *Validations*
-

General Upgrade Impact Information

This chapter details the impacts that occur as a consequence of upgrading from version 6.0—this information does not apply to an initial installation of version 7.0 or 7.1. Unless otherwise specified, upgrade impacts introduced in version 7.0 span into version 7.1; however, for your convenience, this information has been identified by the version in which the impact occurred.

Customized Solutions

As with any upgrade, customized solutions (including PSO customizations or Special Ops solutions) are at risk of not functioning exactly as intended once an upgrade is completed. Please carefully review your customizations before proceeding with the upgrade. It is possible that new features and functionality provided in version 7.1 have made these solutions obsolete.

Cascading Style Sheets and Corporate Logos

If you are upgrading from version 6.0 SP10 (or earlier), you should note that the cascading style sheets located in the `Dashboard.war` file have undergone the following organizational changes and any changes to the look and feel of your standard interface may be impacted.

- The contents of the `autocompletewindow.css`, `button.css`, `dashboard.css`, `dashboard-spacing.css`, `datachooser.css`, `field.css`, `tab.css`, and `windoid.css` (and their corresponding `_rtl` versions) have been consolidated in the `df-portal.css` (and `df-portal_rtl`) files.
- No changes have been made to the `portlet.css` and `portlet-extensions.css` (and their corresponding `_rtl` versions) files.
- Numerous new cascading style sheet files have been added; however, these currently have no impact on PPM Center.

Other cascading style sheet changes may have been made as a result of features introduced in 6.0 SP13 and 6.0 SP14.

Customizations made to the cascading style sheet for the standard interface will need to be re-assessed since several new style sheets have been introduced in versions 7.0 and 7.1.

Due to the change of ownership, the corporate logos used in the PPM Center user interfaces have changed. These modifications also impact the dimensions of the graphics files that are specified in the cascading style sheets.

HP Project Management

The upgrade impacts listed here apply to upgrades from version 6.0 to version 7.1. Any impacts also applicable to upgrades from version 7.0 to version 7.1 are explicitly noted.

Version 7.0 introduced significant changes, both conceptual and architectural, to HP Project Management. As a result, there are significant associated upgrade impacts, which are outlined here. The upgrade includes a pre-validation script that will assist in identifying some of the application functionality currently in use that will be impacted by the upgrade.

Project-Level Impacts

All projects now include a process workflow as well as extensible project-level field and each project is associated with a project type.

- **Project Types.** The number of project types created during upgrade will depend upon your application usage in PPM Center version 6.0. A default project type named Enterprise is always created. In general, a project type will be created for each project template defined in version 6.0, and for each request type which includes the “PFM Project” field group.
- **Request Types and Workflows.** HP Project Management utilizes HP Demand Management’s request type and workflow features to provide extensible project-level data capture and the project process workflow. During upgrade a default request type named “Project Details” will be created as well as a default workflow named “Project Process.”
- **Projects.** A project is created for each HP Portfolio Management project request or PHP Project Management project plan that existed in version 6.0. If a project plan was associated with an HP Portfolio Management project in version 6.0, they become a single unified project upon upgrade.
 - **Project Names.** It is possible that project name conflicts exist between project plans and HP Portfolio Management project requests in version 6.0. The upgrade will resolve these conflicts during upgrade by appending a suffix and may also create an entry in the upgrade log. In cases where a project plan is associated with an HP Portfolio Management project request, the HP Portfolio Management project request’s project name takes precedence.
 - **Project Type.** Each project will be associated with a project type, based on the type based on the HP Portfolio Management project request type, the type based on the master project’s template, or the default type.

- **Project Policy Settings.** Each project’s policy settings are determined by the settings or other information associated with the project in version 6.0.
- **Health.** Health overrides on the HP Portfolio Management project request carry forward into version 7.1 and will be set to expire within a month of the upgrade. Issue Health is turned off by default.
- **Staffing Profiles.** As of version 7.0, only a single staffing profile can be associated with a project. The active staffing profile from version 6.0 will be associated with the project in version 7.1.
- **Stakeholders.** If your project plan in version 6.0 specified resource groups on any tasks, these resource groups will be added as Stakeholders for the project during upgrade.
- **Budgets.** The budget’s capitalization setting will be synchronized with the project’s setting upon upgrade. You should review your version 6.0 project plan and associated budget settings to resolve discrepancies prior to upgrade.



The synchronization of the budget capitalization setting to the project’s setting impacts upgrades from version 7.0 as well as version 6.0. All customers should identify and correct discrepancies prior to upgrade.

Work Plan Impacts

Several changes are made to work plans during upgrade, mostly in relation to actuals and task status.

- Actuals were captured at the task level in past versions. Now they are captured per resource. During upgrade, existing actuals will be apportioned to the assigned resources on the task.
- For open work plans integrated with HP Time Management, actual effort, actual start and actual finish information will be derived from HP Time Management data during upgrade. Because prior versions allowed the project's relationship with HP Time Management to shift at any time, it is possible that the work plan was missing some HP Time Management information, so the total actual effort and the distribution of effort across the plan may change during upgrade. Data in closed work plans is not refreshed, but a script is provided to allow your instance administrator to refresh the data should you choose to re-open the work plan.
- The relationship between different pieces of actuals data was not enforced in prior versions, which could lead to situations of inconsistent or contradictory data. The upgrade leaves data as is as much as possible, but

will change data where it is imperative. The application may require you to correct inconsistent data as you make other changes to tasks after upgrade.

- In conjunction with this, Estimated Remaining Effort is recalculated during upgrade based on the available Actual Effort and Percent Complete information. If you are tracking Estimated Remaining Effort, you may wish to review your data prior to upgrade to align the values.
- Estimated Finish Date will also be populated if it has no value in version 6.0.
- Actual Start dates will be defaulted for tasks that are Complete or Cancelled and lack a date. This is to ensure the data appears as expected in other parts of PPM Center. The date will be set to the earlier of the Scheduled Start or existing Actual Finish.
- In version 7.0, the New status for low-level tasks is eliminated, and a task's status is determined primarily by its progress information and relationship to other tasks. As such, the upgrade will re-derive the task status as required. The External status is also removed, and the work plan status will be re-derived.
- The Bypassed task status has been decommissioned; therefore, version 6.0 tasks that are Bypassed will be in Cancelled status after the upgrade.
- The Request Updates Task relationship between tasks and requests has been decommissioned, and any existing relationships are will be changed to informational references.
- Data relating to other decommissioned functionality is not carried forward during upgrade.
- Because some of these changes can imply related cost changes for the work plan, open work plans will be queued for re-costing during upgrade. The standard costing services will process these after the upgrade is complete.
- Detailed exception and schedule health information is not carried forward during upgrade. Open work plans will be re-processed and their exceptions and schedule health refreshed on the next periodic run of the exception service.

Work plan templates from version 6.0 are carried forward as work plan templates. Settings information is removed.

References Impacts

Existing references in version 6.0 are upgraded as follows:

- References to version 6.0 master projects become project references
- References to version 6.0 sub-projects become task references
- References to HP Portfolio Management project requests become project references
- Request Updates Task references become Related to this Task references
- Contained in this Program reference is removed, as the project-program relationship is no longer defined using references

Things to Do Before You Upgrade

Close any projects, project plans, and so forth which are actually finished but are still open within PPM Center. This will make the upgrade processing more efficient.

Review the pre-validation script, then identify and correct data inconsistencies.

Things to Do After You Upgrade

After upgrade:

- Review and amend the request type and work flow security for your project-related request types and work flows. These security settings are considered in determining who can view a given project.
- Review and amend access grant settings for your security groups to verify that the defaulting provided by the upgrade meets your needs. You will need to add View Projects or Edit Projects access grants to users that interacted with PPM Center project requests but not project plans in version 6.0.
- Set ownership controls on project types, as required by your business.
- Review existing workflows to configure them to match your processes.
- Configure new `server.conf` parameters, including setting that control the number of tasks displayed at a time in the work plan.
- Review and adjust policy settings for your projects.
- Review and begin to use new functionality.

- Version 6.0 Project Template Custom Fields and related project plan data are not carried forward into PPM Center version 7.1. You can set up Task User Data or additional project-level fields to hold this information in version 7.1. You should do this, including any custom migration of data, prior to dropping the old version 6.0 tables.
- Version 6.0 Project User Data definitions and related project plan data are not carried forward into PPM Center version 7.1. You can set up Task User Data or additional project-level fields as appropriate for your usage to hold this data in version 7.1. You should do this, including any custom migration of data, prior to dropping the old version 6.0 tables.

Microsoft Project Integration

Version 7.0

Microsoft Project integration now requires the installation of the Plug-in for PPM. This can be done by each Microsoft Project user (if they have local administrator privileges for their computer), by a project manager having the appropriate access grants, or deployed using tools similar to SMS (System Management Server); see the *HP Project Management User's Guide* and the *System Administration Guide and Reference* for details.

Before using the Plug-in for PPM, the PPM Center instance administrator should:

- Verify and set the `server.conf` parameter that identifies the Microsoft Project field that the PPM Center will use to store linkage information to the PPM Center project. The same field must be used across all projects in the PPM Center instance and should not be changed once Microsoft Project projects have been integrated with the instance. HP recommends that you change this setting only if the field is already in use in Microsoft Project.
- Verify and adjust the access grants controlling who should be able to use the Plug-in for PPM.
- Verify and set the field storage settings in the Microsoft Project integration policy for each project that will integrate with Microsoft Project. HP recommends that you change these settings only for fields already in use in Microsoft Project.
- Verify the actuals transfer setting in the Microsoft Project integration policy for each project that will integrate with Microsoft Project.

When PPM Center users open an existing Microsoft Project file that integrated with a prior version of PPM Center, they will be able to associate the file with a project in HP Project Management via a special “upgrade” item in the menu. This re-establishes the relationship between the data in the Microsoft Project file and the PPM Center work plan. Once this association is made, they can continue to use the file as they would any other integrated file.

Version 7.1

The Plug-in for PPM delivered with version 7.0 has been updated in version 7.1.

No action is required for files previously integrated with PPM Center version 7.0.

HP Resource Management

In version 6.0, when a staffing profile attached to a proposal with a project plan, the staffing profile appears on the Resource Management tab of the project plan.

After an upgrade to version 7.1, there is no longer a link between the proposal’s staffing profile and the project.

Reporting Meta Layer

The Reporting Meta Layer (RML) views (except for HP Demand Management and HP Deployment Management) have been deprecated and are no longer supported.

Additionally, the RML views prefixed with the following have been deleted:

- RML_Resource
- RM_Mprj

The functionality provided by the RML views will be addressed in a future release as part of a comprehensive Reporting and Business Intelligence solution.

Data Model Changes

The data model for this version of PPM Center has been significantly modified. However, for your convenience, a compatibility meta layer (CML) has been developed to map the following version 6.0 tables and views on the current view:

- kdrv_assignments
- kdrv_predecessors
- kdrv_project_templates
- kdrv_project_templates_v
- kdrv_projects
- kdrv_projects_v
- kdrv_state_change_history
- kdrv_states_v
- kpmo_program_projects
- kpmo_program_projects_v
- kpmo_program_summary
- kpmo_programs
- krsc_project_plan_actual_v
- krsc_resource_skills
- krsc_resource_skills_v
- krsc_rsc_pools
- krsc_rsc_pools_v
- krsc_skills
- krsc_skills_v
- krsc_staff_prof_prj_plans_v
- krsc_staff_profs
- krsc_staff_profs_v
- ktmg_activities
- ktmg_activity_rules

- ktmg_activity_rules_v
- ktmg_resource_delegations
- ktmg_resource_settings
- ktmg_time_sheet_line_details
- ktmg_time_sheet_lines
- ktmg_time_sheets
- ktmg_ts_line_charge_codes
- ktmg_time_sheet_bil_approvers
- ktmg_time_sheet_line_approvers

The following tables are renamed in version 7.0 without any changes to their columns; however, synonyms are provided:

- kcrf_fg_prog_risk
- kcrf_fg_prog_risk_int
- kcrf_fg_prog_scope_change
- kcrf_fg_prog_scope_change_int

Custom reports, portlets, and validations created using an `_v` extension should work with minimal effort after the upgrade.

HP recommends that you use the new data model rather than rely on the compatibility meta layer.



As of version 7.1, the Time Management tables (prefixed with `ktmg`) have already been deprecated.

Entity Changes

The following tables provide details about changes to the entities provided with the “core version” of PPM Center.

Any modifications to additional HP products (such as Extensions, Migrators, and integrations) are not included in this guide. See their accompanying documentation for version 7.0 impacts.

Request Types and Request Header Types

Table 4-1. Request types and request header types

Entity	Version	Impact
Program Issue Allows issues to be logged directly against a program rather than against a project in the program.	7.0	Added
Project Details Provides details for non-HP Portfolio Management projects.	7.0	Added
PMO - Issue	7.0	Renamed as Project Issue
PMO - Risk	7.0	Renamed as Project Risk
PMO - Scope Change Request	7.0	Renamed as Project Scope Change
PMO - Program Request	7.0	Deleted
PMO - Resource Request	7.0	Deleted

Object Types

Table 4-2. Object types

Entity	Version	Impact
ITG Project Template Migrator	7.0	Deprecated (although not indicated in its name)
ITG Workplan Template Migrator Migrates work plan templates between PPM Center instances.	7.0	Added
ITG Project Type Migrator Migrates project types between PPM Center instances.	7.0	Added
	7.1	Re-written Use of the earlier version should be discontinued and objects based on the earlier version should be re-implemented.

Additionally, in version 7.1, the “ITG” prefix has been changed to “PPM.”

Special Commands

Table 4-3. Special commands (page 1 of 4)

Entity	Version	Impact
ksc_connect_env_group_dest_client Connect to environment group destination client.	7.0	Added
ksc_connect_env_group_dest_server Connect to environment group destination server.	7.0	Added
ksc_connect_env_group_source_client Connect to environment group source client.	7.0	Added
ksc_connect_env_group_source_server Connect to environment group source server.	7.0	Added
ksc_copy_request Creates a copy of a specified request without any user intervention.	7.1	Added

Table 4-3. Special commands (page 2 of 4)

Entity	Version	Impact
ksc_create_BAC_SLA Call HP Business Availability Center to create an agreement.	7.0	Added
ksc_create_BAC_report Call HP Business Availability Center to generate a report and store it in PPM Center, attached to the request.	7.0	Added
ksc_create_BAC_report_requests Create report request for generating BAC reports.	7.0	Added
ksc_create_BAC_service Command to create service in BAC.	7.0	Added
ksc_create_BTO_incident Create BTO incident. Reserved for post PPM Center 7.0 releases.	7.0	Added
ksc_create_QCD_subject Call Quality Center Dashboard to create a subject.	7.0	Added
ksc_export_actual_time Export actual time information to a remote server.	7.1	Added
ksc_create_SAP_Transports_Requirements_List Create QC requirements tree for the package and for each SAP transport package line it contains.	7.0	Added
ksc_create_TestSet_in_QC Call Quality Center to create a test set.	7.0	Added
ksc_create_baseline Creates an active work plan baseline for a given project, based on the exist work plan.	7.0	Added
ksc_create_defect_in_QC Call Quality Center to create a defect.	7.0	Added
ksc_create_project Generates a project at the end of your proposal process. All relevant proposal information, including the budget, financial benefit, and staffing profile, are copied to the project.	7.0	Added

Table 4-3. Special commands (page 3 of 4)

Entity	Version	Impact
ksc_create_requirement_in_QC Call Quality Center to create a requirement.	7.0	Added
ksc_create_workplan Creates a work plan (from a given work plan template) as one of the steps in the project process.	7.0	Added
ksc_delete_BAC_SLA Call HP Business Availability Center to delete an agreement.	7.0	Added
ksc_delete_BAC_service Call HP Business Availability Center to delete a service from its service catalog.	7.0	Added
ksc_delete_MAM_RFC_id Delete MAM RFC ID.	7.0	Added
ksc_delete_QCD_Subject Call Quality Center Dashboard to delete a subject.	7.0	Added
ksc_export_fields Send field updates to all existing remote references.	7.0	Added
ksc_export_request Send a copy of a request to a remote server.	7.0	Added
ksc_export_status_change Send status and field updates to all existing remote references.	7.0	Added
ksc_get_Applications_from_CMD Get a list of CIs of type Application from the CMDB.	7.0	Added
ksc_get_QC_Assigned_To_List Get domain users from Quality Center.	7.0	Added
ksc_get_QC_Defect_Instance_Domains_List Get a list of Quality Center instance domains for defect.	7.0	Added
ksc_get_Defect_Instance_Projects_List Get a list of Quality Center instance projects for defect.	7.0	Added

Table 4-3. Special commands (page 4 of 4)

Entity	Version	Impact
ksc_get_QC_Instance_Domains_List Get a list of Quality Center domains.	7.0	Added
ksc_get_QC_Instance_List Get a list of Quality Center instance domains.	7.0	Added
ksc_get_QC_Projects_List Get a list of Quality Center instance projects.	7.0	Added
ksc_itg_run_sql Runs SQL queries directly against the PPM Center Oracle schema. This special command will likely be used in an object type or a command validation.	7.0	Added
ksc_move_request_workflow Allows a workflow event to occur on the specified request.	7.1	Added
ksc_oa_fndload_import Import using FNLOAD.	7.0	Added
ksc_oa_run_ql Execute Oracle SQL script against an Oracle database using JDBC.	7.0	Added
ksc_publish_BAC_report Publishes the last BAC report that was generated.	7.0	Added
ksc_run_MAM_impact_analysis Run MAM impact analysis.	7.0	Added
ksc_set_resource_pool_status	7.0	Deleted
ksc_update_BTO_Change_Status Update BTO change status. Reserved for post PPM Center 7.0 releases.	7.0	Added
ksc_update_project_status Drives the internal status of the project (not the visible status determined by the project process work flow). This internal status drives basic editability functionality.	7.0	Added
ksc_update_workplan_status Updates the status of the work plan from the controlling project process workflow.	7.0	Added

Security Groups

Table 4-4. Security groups

Entity	Version	Impact
SY - Time User	7.0	Deleted
ITG Change Management Administrator	7.0	Renamed as ITG Deployment Manager Administrator
ITG All Access Grants Provides all access grants.	7.0	Added
ITG Billing Manager Time Management - billing manager.	7.0	Added
ITG Time Administrator Time Management - administrator.	7.0	Added
ITG Time Manager Time Management - team manager.	7.0	Added
SLM - BAC Monitoring Expert BAC monitoring expert.	7.0	Added
SLM - Integration Administrator Integration administrator.	7.0	Added
SLM - Service Customer Service customer.	7.0	Added
SLM - Service Level Manager Service level manager.	7.0	Added
SLM - Service Provider Service provider.	7.0	Added

Additionally, in version 7.1, the “ITG” prefix has been changed to “PPM.”

Access Grants

Table 4-5. Access grants (page 1 of 3)

Entity	Version	Impact
Access Request Query Builder Provides access to Query Builder functionality when searching requests.	7.0	Added
Approve Financial Benefits	7.0	Added
Approve Resource Pools	7.0	Deleted
Approve Staffing Profiles	7.0	Deleted
Change Request Type Allows the user to edit a request type when creating a request. [SP3]	7.0	Added
Create Projects The ability to edit a project is no longer sufficient to create a project—this access grant is used to allow creation of a project.	7.0	Added
Delete Projects Allows the user to delete projects which they could edit as, or on behalf of, a project manager. That is, they have either the Edit Project and/or the Edit All Projects access grant.	7.1	Added
Delete Projects with Actuals Allows the user to delete projects even if actuals exist for the project. User must also have Delete Projects and all other associated access grants.	7.1	Added
Edit All Roles Allows the user to create or edit roles.	7.0	Added
Edit Cost Data	7.0	Renamed as Edit Work Plan Cost Data
Edit Cost Rate Rules Allows the user to create or edit cost rate rules.	7.0	Added
Edit Project Types Allows the user to edit project types. Note that project types employ an ownership model that can further restrict editing access.	7.0	Added
Edit Project Templates	7.0	Renamed as Edit Work Plan Templates

Table 4-5. Access grants (page 2 of 3)

Entity	Version	Impact
Edit Time Mgmt Settings	7.0	Deleted
Manage Activities	7.0	Renamed as Edit Activities
Manage All Work Plan Baselines	7.0	Added
Manage Contacts	7.0	Renamed as Edit All Contacts
Manage Cost Factors Permits changing of the cost factors	7.1	Added
Manage Demands	7.0	Renamed as Edit Demands
Manage Financial Exchange Rates	7.0	Renamed as Edit Financial Exchange Rates
Manage Packages	7.0	Renamed as Edit All Packages
Manage Programs	7.0	Renamed as Edit All Programs
Manage Projects	7.0	Renamed as Edit All Projects
Manage Regions	7.0	Renamed as Edit Regions
Manage Releases	7.0	Renamed as Edit All Releases
Manage Reports	7.0	Renamed as Edit All Reports
Manage Requests	7.0	Renamed as Edit All Requests
Manage Scenario Comparison	7.0	Renamed as Edit All Scenario Comparisons
Manage Service Catalogs	7.1	Added
Manage Work Allocations	7.0	Renamed as Edit All Work Allocations
Manage Work Plan Baselines	7.0	Added
Override Change Mgmt Participant Restriction	7.0	Renamed as Override Deployment Mgmt Participant Restriction
Override Project Mgmt Participant Restriction	7.0	Renamed as View All Projects
Request Services For All Users	7.1	Added
Request Services For Me	7.1	Added

Table 4-5. Access grants (page 3 of 3)

Entity	Version	Impact
Synchronize Work Plans Allows user to synchronize work plans between Microsoft Project and PPM Center.	7.0	Added
Update Resource Pool Status	7.0	Deleted
View All Roles Allows the user to view all roles.	7.0	Added
View Cost Data	7.0	Renamed as View Project, Program, and Time Sheet Cost Data
View Project Types Allows the user to view project types.	7.0	Added
View Project Templates	7.0	Deleted
View Time Mgmt Settings	7.0	Deleted
View Work Plan Templates Allows the user to view work plan templates.	7.0	Added

Additionally, in version 7.1, “Kintana” occurrences have been changed to “PPM.”

Licenses

Table 4-6. Licenses

Entity	Version	Impact
Change Management	7.0	Renamed as Deployment Management
Portfolio Optimization	7.0	Not used in version 7.0. For version 7.1, used with the portfolio optimization functionality

Workflows

Table 4-7. Workflows

Entity	Version	Impact
PMO - Issue Management Workflow	7.0	Deleted
PMO - Program Request Workflow	7.0	Deleted
PMO - Resource Request Workflow	7.0	Deleted
PMO - Risk Management Workflow	7.0	Deleted
PMO - Scope Change Request Workflow	7.0	Deleted
Issue Management Process Automated process for issue management.	7.0	Added
Project Process Basic process for managing a project.	7.0	Added
Risk Management Process Automated process for risk management.	7.0	Added
Scope Change Request Process Automated scope change request process with three levels of security.	7.0	Added

Reports

Table 4-8. Reports (page 1 of 2)

Entity	Version	Impact
Administrative category		
SOX - Security Change Lists security changes. [SP3]	7.0	Added
SOX - Security Validation Lists users with multiple roles through security groups linked to workflow steps. [SP3]	7.0	Added
Demand Management category		
Resource Load Report by Category	7.0	Deleted
SLM - Create Monitoring Creates monitoring report requests for all services and agreements of the specified reporting frequency.	7.0	Added
Deployment Management category		
Package Change History Audits the package changes and includes assignment information, line order, and line details for each selected package. [SP3]	7.0	Added
Financial Management category		
Actual Time/Cost Summary	7.0	Deleted In version 7.1, enable the Show Cost field in the Actual Time Summary report to display this information.
Project Management category		
My Tasks	7.0	Added Also found in the Time Management category.
Project Schedule Change	7.0	Re-written and renamed as Baseline Comparison Use of the earlier version should be discontinued and customized reports based on the earlier version should be re-implemented.
Project Critical Path	7.0	Deleted
Project Custom Detail	7.0	Deleted

Table 4-8. Reports (page 2 of 2)

Entity	Version	Impact
Project Detail	7.0	Deleted
Project Detail Report (Filter by Custom Fields)	7.0	Deleted
Project Exception Detail	7.0	Deleted
Project Resource	7.0	Deleted
Project Status Detail	7.0	Deleted
Project Summary	7.0	Deleted
Project Task Assignment	7.0	Deleted
Project Template Detail	7.0	Deleted Use the export to PDF feature in the work plan, often in conjunction with filtering the plan to obtain this information.
Resource Management category		
Project Resource	7.0	Deleted
Project Task Assignment	7.0	Deleted
Resource Load Report by Priority	7.0	Deleted
Time Management category		
Delinquent Time Sheets Shows information on delinquent time sheets.	7.0	Added
Actual Time/Cost Summary	7.0	Deleted
Actual Time Summary	7.1	Re-written Use of the earlier version should be discontinued and customized reports based on the earlier version should be re-implemented.

Additionally, in version 7.1, “ITG” occurrences have been changed to “PPM.”

Portlets

Table 4-9. Portlets (page 1 of 3)

Entity	Version	Impact
No category specified		
Program List Displays the programs and their summary conditions.	7.0	Moved to Program Management category.
Resource Assignments Displays the packages, requests, and tasks assigned to a set of users.	7.0	Moved to Project Management category.
Financial Management		
Program Cumulative Cost Metrics	7.0	Deleted
Program Current Cost Metrics	7.0	Deleted
Project Budget and Staffing profile vs. Actuals	7.0	Deleted
Project Cumulative Cost Metrics Analyze cumulative cost metrics for a project.	7.1	Deleted Use of the Analyze Cumulative Cost portlet is recommended.
Portfolio Management		
Resource by Category	7.0	Deleted
Project Management		
Project Summary Pie Chart	7.0	Deleted
Project Health Pie Chart Displays the projects by health.	7.0	Added
Project Timelines Displays project overview information.	7.1	Added

Table 4-9. Portlets (page 2 of 3)

Entity	Version	Impact
Requests		
Current Demand List Provides a customizable list of the current and future demand placed on an organization or individual.	7.1	Added
Demand List	7.1	Java portlet implementation Deprecated
	7.1	List portlet implementation Added
Program Issue List Lists open issues associated with a program.	7.0	Renamed as Issue List Also found in Program Management category.
Program Resource Request List	7.0	Deleted
Resource Management		
Compare Project to Staffing Profile	7.0	Deleted Replaced by the Analyze Staffing Profile page available from the staffing profile.
Current Resource Load by Organization	7.0	Deleted
Current Resource Load by Skill	7.0	Deleted
Resource Request	7.1	Added
Time Management		
Delinquent Time Sheets	7.0	Deleted Replaced by the Delinquent Time Sheets report.
Time Sheet Approvals Displays the list of time sheets that need approval by the current user.	7.0	Renamed as TMG - Time Sheet Approvals
	7.1	Renamed as Approve Time Sheets
TMG - Actuals for Direct Reports	7.1	Renamed as Time Sheet Totals for Direct Reports
TMG - My Time Sheets Displays the user's time sheets for the last ten time periods.	7.1	Renamed as My Time Sheets

Table 4-9. Portlets (page 3 of 3)

Entity	Version	Impact
TMG - My Work Items Displays all the user's work items on open time sheets	7.1	Renamed as My Work Items
TMG - Resource Group Total by Work Item	7.1	Renamed as Time Sheet Totals by Work Item, Resource Group
TMG - Resource Group Totals	7.1	Renamed as Time Sheet Totals by Resource Group
TMG - Resource Totals	7.1	Renamed as Time Sheet Totals by Resource
TMG - Total Hrs by Work Item	7.1	Renamed as Time Sheet Totals by Work Item
TMG - Work Allocation Details	7.1	Renamed as Work Allocation Details
TMG - Work Item Set Budget and Actuals	7.1	Renamed as Work Item Set Actuals vs. Allocations

Tokens

Table 4-10. Tokens

Entity	Version	Impact
Resource Pool		
ACTIVE_FLAG	7.0	Deleted
STATUS_CODE	7.0	Deleted
STATUS_NAME	7.0	Deleted
START_PERIOD	7.0	Deleted
INITIATION_REQUEST	7.0	Deleted
Staffing profile		
ACTIVE_FLAG	7.0	Deleted
PERIOD_SIZE	7.0	Deleted
User		
PRIMARY_SKILL_ID	7.0	Renamed as PRIMARY_ROLE_ID
PRIMARY_SKILL_NAME	7.0	Renamed as PRIMARY_ROLE_NAME
System		
ITG_TIME_STAMP	7.0	Added

Validations

Table 4-11. Validations (page 1 of 4)

Entity	Version	Impact
Not used in workflows		
DRV - Activities	7.0	Deprecated
DRV - Activities - AutoComp	7.0	Deprecated
DRV - Activity Priority - Enabled	7.0	Deprecated
DRV - Activity Status - Enabled	7.0	Deprecated
DRV - Add User To Task	7.0	Deprecated
DRV - All Project List	7.0	Deprecated
DRV - All Regular Report Types	7.0	Deprecated
DRV - Book Skilled	7.0	Deprecated
DRV - Confidence	7.0	Deprecated
DRV - Custom Fields base on Project Template	7.0	Deprecated
DRV - Exception Rule Types	7.0	Deprecated
DRV - Filter Reference Type	7.0	Deprecated
DRV - Filter Relationship	7.0	Deprecated
DRV - Interface Resources Tables	7.0	Deprecated
DRV - Master Projects - Enabled	7.0	Deprecated
DRV - Master Projects - Enables and not Added	7.0	Deprecated
DRV - My Tasks Sort By	7.0	Deprecated
DRV - Proj Manager - Restricted	7.0	Deprecated
DRV - Project Detail Report Order By	7.0	Deprecated
DRV - Project Fields	7.0	Deprecated
DRV - Project Grouping Type	7.0	Deprecated
DRV - Project Header Fields	7.0	Deprecated
DRV - Project List Portlet Narrow Sort By	7.0	Deprecated
DRV - Project List Portlet Wide Sort By	7.0	Deprecated

Table 4-11. Validations (page 2 of 4)

Entity	Version	Impact
DRV - Project Names - All	7.0	Deprecated
DRV - Project Names - All - Depend on [P_SHOW_MASTER_ONLY]	7.0	Deprecated
DRV - Project Names - In Templates	7.0	Deprecated
DRV - Project Names by Template	7.0	Deprecated
DRV - Project State Search	7.0	Deprecated
DRV - Project States	7.0	Deprecated
DRV - Project Status - All	7.0	Deprecated
DRV - Project Task Aging Report Order By	7.0	Deprecated
DRV - Project Team Resource	7.0	Deprecated
DRV - Project Template Names	7.0	Deprecated
DRV - Project Template Names - Enabled	7.0	Deprecated
DRV - Project Template Names - Restricted Enabled	7.0	Deprecated
DRV - Project Template with TemplateID and ParameterSetContextID	7.0	Deprecated
DRV - Project Type Names - All	7.0	Deprecated
DRV - Project Type Prompt - All	7.0	Deprecated
DRV - Project Type Status - All	7.0	Deprecated
DRV - Project Types - All	7.0	Deprecated
DRV - Project Types - Enabled	7.0	Deprecated
DRV - Project User Data Roll-Up Fields	7.0	Deprecated
DRV - Projects (Only) - Enabled	7.0	Deprecated
DRV - Projects - All	7.0	Deprecated
DRV - Projects - Enabled	7.0	Deprecated
DRV - Regular Report Types	7.0	Deprecated
DRV - Request Priority - All	7.0	Deprecated

Table 4-11. Validations (page 3 of 4)

Entity	Version	Impact
DRV - Request Reference Relationships	7.0	Deprecated
DRV - Resource Group - Restricted Enabled	7.0	Deprecated
DRV - Resource Names - Proj Teams	7.0	Deprecated
DRV - Resource or Project Manager	7.0	Deprecated
DRV - Scheduling Constraints	7.0	Deprecated
DRV - Security Restrictions	7.0	Deprecated
DRV - Sort By for Projects	7.0	Deprecated
DRV - Sort By for Tasks	7.0	Deprecated
DRV - Sub Project Ids - Enabled	7.0	Deprecated
DRV - Sub Projects - Enabled	7.0	Deprecated
DRV - Subproject Name for My Tasks	7.0	Deprecated
DRV - Summary Condition	7.0	Deprecated
DRV - Task Categories	7.0	Deprecated
DRV - Task Categories - AutoComp	7.0	Deprecated
DRV - Task Exception Type Names	7.0	Deprecated
DRV - Task Ids - Enabled	7.0	Deprecated
DRV - Task Name - Enabled	7.0	Deprecated
DRV - Task Name - In Templates	7.0	Deprecated
DRV - Task Notification Dates	7.0	Deprecated
DRV - Task States Search	7.0	Deprecated
DRV - Task States	7.0	Deprecated
DRV - Task States for My Tasks	7.0	Deprecated
DRV - Task States for Notification	7.0	Deprecated
DRV - Task User Data Roll-Up Fields	7.0	Deprecated

Table 4-11. Validations (page 4 of 4)

Entity	Version	Impact
DRV - Task and Project #s - Enabled	7.0	Deprecated
DRV - Task and Project Names - Enabled	7.0	Deprecated
DRV - Tasks - All	7.0	Deprecated
DRV - Unlinked Packages for Drive	7.0	Deprecated
DRV - Unlinked Project References for Drive	7.0	Deprecated
DRV - Unlinked Requests for Drive	7.0	Deprecated
DRV - Workflow - All	7.0	Deprecated
DRV - Workflow - Enabled	7.0	Deprecated
KRSC - Resource Pool Names	7.0	Deprecated
KRSC - Skill	7.0	Deprecated
RSC - Resource Pool Status	7.0	Deprecated
RSC - Resource Pool Status w/o Approved	7.0	Deprecated
RSC - Skill Name - All	7.0	Deprecated
RSC - Skills - Drop Down - Enabled	7.0	Deprecated
RSC - Skills - Enabled	7.0	Deprecated
PMO - Program Names	7.0	Deleted
TMG - Activities (for Reports)	7.0	Deleted

Numerous validations have been added in this version.

Additionally, in version 7.1, the “ITG” prefix has been removed from all validation names.



HP recommends that you discontinue use of the deprecated validations as soon as reasonable.

5 System Requirements and Configuration Updates

In This Chapter:

- *Disk Space Requirements*
 - *server.conf File Changes*
 - *Oracle Compatibility*
 - *Server Database*
 - *HP Object Migrator and HP GL Migrator*
 - *HP Deployment Management Extension for Oracle E-Business Suite*
-

Disk Space Requirements

Versions 7.0 and 7.1 require significantly more disk space for the installation of PPM Center than required in version 6.0 (and earlier). See the *System Requirements and Compatibility Matrix* document for details, or contact HP-Mercury support (support.Mercury.com) for assistance with sizing projections.

server.conf File Changes

Version 7.0 Additions

The following `server.conf` file parameters have been added in this version.

- **AUTO_COMPLETE_SHORT_TYPE_MAX_ROWS**
Controls the maximum number of rows to retrieve from the database for short type auto-complete lists.
- **COST_RATE_RULE_UPDATE_INTERVAL_MINUTES**
This service updates the planned and actual costs of open projects when new cost rate rules are added or existing cost rate rules are modified.
- **COST_ROLLUP_INTERVAL**
The Cost Rollup Service asynchronously recalculates and rolls up cost (project and program budget costs) asynchronously as part of a service. To set up the service, set the `ENABLE_COST_ROLLUP_SERVICE` parameter to `TRUE` and use this parameter to specify the delay between consecutive runs of the service.
- **DASHBOARD_PAGE_AUTO_REFRESH_DISABLED [SP11]**
When set to `TRUE`, disables the PPM Dashboard auto-refresh feature (from the Personalize Page view).
- **DEFAULT_PAGE_SIZE**
The default value provided to the user for the number of lines to show per page in the Work Plan screen, when the user selects to manually set the value in Edit My Profile page.
- **DEFAULT_PAGE_SIZE_OPTION**

This setting controls the initial type of page size (low, high, or custom) selected in the Edit My Profile page.

- **DEFAULT_REQUEST_SEARCH_ORDER_BY_ID [SP8]**

Affects the **Sort By** field on the Search Requests page. The default value is `TRUE`, which sorts the search results based on Request ID. When set to `FALSE`, the search results are returned unordered.

- **ENABLE_CONCURRENT_REQUEST_UPDATES**

This parameter is related to requests in HP Demand Management. When this is set to `TRUE`, multiple users can change the same request simultaneously. Request data such as notes, new references and new table entries are always saved. Conflicting changes that cannot be saved are displayed to the user as differences.

- **ENABLE_COST_RATE_RULE_UPDATE_SERVICE**

This service updates the planned and actual costs of open projects when new cost rate rules are added or existing cost rate rules are modified.

- **ENABLE_COST_ROLLUP_SERVICE**

PPM Center recalculates and rolls up cost (project and program budget costs) asynchronously as part of a service. To set up the service, set the this parameter to `TRUE`, and then use the `COST_ROLLUP_INTERVAL_MINUTES` parameter to specify the frequency with which the service performs its calculations.

- **ENABLE_TASK_ACTUAL_ROLLUP_SERVICE**

This service is used to roll up actuals from tasks to the root tasks when a person enters actuals through the My Tasks portlet.



Functionality associated with this parameter was expanded in version 7.1.

- **ENABLE_PENDING_EV_UPDATES_CLEANUP**

If set to `TRUE`, removes duplicate rows in the Pending EV Updates table. Use this parameter in conjunction with `PENDING_COST_EV_UPDATES_SERVICE`.

- **ENABLE_PORTLET_FULL_RESULTS_SORTING**

This parameter allows you to optimize portlet results for either accuracy or performance. Typically, portlet results are limited to 200 items. When this

parameter is set to `FALSE`, the first 200 results will be sorted and displayed (yielding improved performance; but, you may not have the most accurate results). When this parameter is set to `TRUE`, all the results will be sorted and the top 200 displayed (yielding the most accurate results, with poor performance).

- `ENABLE_PROJECT_LAUNCH_FROM_ACTION_MENU`

If set to `TRUE`, allows users with the required permission to open the PPM Workbench as a stand-alone application using Active X.



Functionality associated with this parameter was expanded in version 7.1.

- `ENABLE_PROJECT_PV_UPDATE_SERVICE`

If set to `TRUE`, enables the Project Planned Value Update service.

- `ENABLE_QUICKLIST_UPDATE`

Controls the visibility of the **Update** button on the Quick List.

- `ENABLE_QUERY_BUILDER`

This parameter enables the Query Builder functionality in HP Demand Management.

- `ENABLE_REFERENCE_UPDATE_SERVICE`

When set the `TRUE`, enables the service that updates references between entities. See also `REFERENCE_UPDATE_INTERVAL`.

- `ENABLE_TIME_SHEET_NOTIFICATIONS_SERVICE`

If set to `TRUE`, enables notification on time sheets.

- `ENABLE_UNICODE_FOR_TELNETCLIENT [SP5]`

If set to `TRUE`, enables Unicode support in telnet.

- `FX_RATE_UPDATE_SERVICE_INTERVAL_MINUTES`

This service updates the planned and actual costs of open projects, budgets, and benefits when new currency exchange rates rules are added or existing exchange rates are modified.

- `HIGH_PAGE_SIZE`

The recommended number of work plan lines to load into the Work Plan page if the user is connected through a fast connection such as a LAN.

- **JAVA_PLUGIN_XPI_PATH**

Specifies the Web location for downloading the cross-platform Java plug-in installer for Firefox browsers.

- **JVM_OPTIONS [SP9]**



This parameter is for HP internal use only. Do not alter its value unless directed to do so by HP-Mercury support.

- **LDAP_URL_FULL [SP10]**

PPM Center uses this parameter to handle multiple domains during LDAP authentication. The values for the parameter include a space-separated (not comma-separated) list of full LDAP URLs. Each LDAP URL must specify a base DN.

- **LOW_PAGE_SIZE**

The recommended number of work plan lines to load into the Work Plan page if the user is connected through a slow connection such as a WAN.

- **MAX_PAGE_SIZE**

The absolute maximum number of work plan lines that can be loaded into the Work Plan page. Use this parameter to prevent excessive load on the server from excessive queries, and to prevent users from getting themselves into low performance situations.

- **MSP_PROJECT_CUSTOM_FIELD**

This allows configurators to use the Text30 field for something other than the Plug-in for PPM synchronization information. Specify the name of the alternate field for this data.



- **OPTIMIZER_NUMBER_OF_TIMESHIFTS**

Maximum number of periods the optimizer can shift start dates forward. This does not affect manually-shifted HP Portfolio Management entities; only on the optimizer.

If you allow a new start date for a project, the optimizer can start the project any time between the original start date and six months out after that date.

- **PAGE_PDF_EXPORT_DISABLED [SP11]**

Allows you to enable (or disable) export of PPM Dashboard pages as PDF files.

- **REFERENCE_UPDATE_INTERVAL**
Controls the interval for checking whether references between entities should be updated. See also `ENABLE_REFERENCE_UPDATE_SERVICE`.
- **REQUEST_SEARCH_RESULTS_MAX_ROWS [SP8]**
Determines the maximum number of results returned by a search. The value is displayed as the default in the **Limit Rows Returned To** field.
- **RESOURCE_FINDER_ROLE_WEIGHT**
The value of this parameter is used to calculate the suitability score for items returned on the resource finder results page.
- **RM_DEFAULT_EFFORT_TYPE**
Setting used to determine the default effort type used to display staffing profiles and resource pool information. Specify one of the following lowercase values:
 - hours
 - fte
- **RM_DEFAULT_PERIOD_TYPE**
Setting used to determine the default period type used to display staffing profiles and resource pool information.
- **RMI_VALIDATE_SERVER_CERTIFICATE [SP8]**
This parameter is used if PPM Server is running in secure RMI mode.
If set to `TRUE`, the client PPM Workbench validates the server certificate against the Certificate Authorizer's to verify server identity. If set to `FALSE`, the certificate is not validated.
- **SERVER_MAX_PERM_SIZE [SP9]**
 This parameter is for HP internal use only. Do not alter its value unless directed to do so by HP-Mercury support.
- **SERVICE_PROVIDER_SECURITY_GROUP**
 This parameter is for HP internal use only. Do not alter its value unless directed to do so by HP-Mercury support.
- **TASK_ACTUAL_ROLLUP_INTERVAL**

Controls the time interval for the roll up service. This service periodically rolls up actuals for the tasks that are modified when a person enters actuals using the My Tasks portlet, a time sheet, or the Enter Actuals page.

- TIME_ZONE [SP6]

This parameter is used to set the time zone that is displayed to users to a time zone other than the time zone of the PPM Server and the associated Oracle database server. The TIME_ZONE parameter determines the displayed time zone on an instance-wide basis. That is, all times displayed to the user are in this time zone.

- TMG_FUTURE_PERIODS_TO_ALLOW

Specifies the number future periods for which users can enter time

- TMG_PAST_PERIODS_TO_ALLOW

Specifies the number of previous periods for which users can enter time.

- WORKBENCH_PLUGIN_VERSION [SP9]

Specifies the Java plug-in version used to access the PPM Workbench interface.

Version 7.1 Additions

- COLLAPSE.SINGLE.PAGE.MODULE

For single-page modules, controls whether the menu displays either the module name or *<Page_Name>* (*<Module_Name>*).

- COLOR_CACHE_SIZE

This parameter is used to extend the number of colors available in the cached copy of the `ColorPalette.css` file.

- dashboard.Web-Server

When `TRUE`, indicates that IIS/Apache is used. This parameter must be set to avoid problems exporting PPM Dashboard pages as PDF files.

- GROUP.PRIVATE.PUBLIC.PAGES

Controls whether the menu is divided in **Private** and **Shared** areas.

- **PM_CAN_ROLLUP_ACTUALS_ON_SAVE**

When `TRUE`, allows the user to change the mode on HP Project Management's Enter Actuals page. The resulting options will be either rollups that are calculated during save processing or the rollups are deferred (and rolled up using the associated service).
- **PM_NUM_EDIT_ASGMTS**

Specifies the maximum number of assignments that can be displayed for editing on HP Project Managements' Enter Actuals page.
- **PM_NUM_EDIT_TASKS**

Specifies the maximum number of tasks that can be edited on HP Project Management's Quick Edit page.
- **PROJECT_PV_UPDATE_INTERVAL_MINUTES**

Controls the interval for Project Planned Value Update service.
- **RM_ALLOWED_EFFORT_TYPES**

Specifies the types of effort to allow. This is a comma-delimited, order-independent list. Specify one (or more) of the following lowercase values:

 - hours
 - fte
 - person_days
- **RM_DEFAULT_EFFORT_TYPE**

The allowable values have been enhanced to include `person_days`.
- **SHOW.PERSONALIZE.FIRST**

Control whether the menu displays the **Personalize Dashboard** link as the first or last item on the **Dashboard** menu.

The following parameters are also new in this version; however, due to the manner in which the PPM Dashboard application module is integrated into the PPM Center product, adjustments to the default values should be rare. Consequently, this list is provided for informational purposes and to help ensure completeness.

- dashboard.Application-Server
- dashboard.Character-Encoding
- dashboard.Chart-Width-Restriction-Enabled
- dashboard.Data-Source
- dashboard.Database-Type
- dashboard.DSH - Center Name
- dashboard.DSH - Org Units Supported
- dashboard.DSH - Version
- dashboard.Footer
- dashboard.Header
- dashboard.Kiosk-Mode-Disabled
- dashboard.Layout-Direction
- dashboard.Non-SSL-Port
- dashboard.openDataSource
- dashboard.Page-Auto-Refresh-Disabled
- dashboard.Page-PDF-Export-Export-Disabled
- dashboard.Smtp-Port
- dashboard.Smtp-Server
- dashboard.SQL-Debug
- dashboard.Time-Zone

Version 7.0 Deletions

The following `server.conf` file parameters are no longer supported:

- `ENABLE_PENDING_PROJECT_CHANGE`
- `ENABLE_PORTLET_FULL_RESULTS_SORTING`
- `ENABLE_SKILL_RSC_COST_UPDATE_SERVICE`
- `EXCEPTION_ENGINE_INTERVAL`
- `FX_RATE_UPDATE_SERVICE_INTERVAL`
- `JAVA_PLUGIN_CLASSID [SP9]`
- `JAVA_PLUGIN_PATH_IE [SP9]`
- `JAVA_PLUGIN_PATH_NS [SP9]`
- `JAVA_PLUGIN_VERSION [SP9]`
- `PENDING_PROJECT_CHANGE_INTERVAL`
- `ROLLUP_BREAKDOWN_SERVICE_DELAY`
- `ROLLUP_BREAKDOWN_SERVICE_ENABLED`
- `SKILL_RSC_COST_UPDATE_SERVICE_DELAY`

Version 7.1 Deletions

The following `server.conf` file parameters are no longer supported:

- `DASHBOARD_PAGE_AUTO_REFRESH_DISABLED [SP11 and 7.0]`
- `PAGE_PDF_EXPORT_DISABLED [SP11 and 7.0]`

Oracle Compatibility

Server Database

The following tables (*Table 5-1* through *Table 5-6*) provide an overview of the Oracle® database versions supported for the PPM Server in of PPM Center versions 6.0, 7.0, and 7.1. Refer to the *System Requirements and Compatibility Matrix* for details specific to version 7.1.

Environments that are not supported in version 7 are shown in the lightly shaded areas.



All installed Oracle versions should include the most recent patches and follow the guidelines provided in the latest *Critical Patch Update*. This information is available from <https://metalink.oracle.com>.

Table 5-1. Oracle database and Microsoft Windows platform support for PPM Center versions (page 1 of 2)

Oracle Version	Windows 2000 Server	Windows 2000 Advanced Server	Windows Server 2003, Standard Edition	Windows Server 2003, Enterprise Edition	Windows Server 2003 R2, Enterprise Edition
9.2.0.5	6.0	6.0	6.0	6.0	
9.2.0.5 RAC	6.0	6.0	6.0	6.0	
9.2.0.6	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP10 (or later)
9.2.0.6 RAC	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP10 (or later)
9.2.0.7	6.0 SP9 (or later)	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
9.2.0.7 RAC	6.0 SP9 (or later)	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1

Table 5-1. Oracle database and Microsoft Windows platform support for PPM Center versions (page 2 of 2)

Oracle Version	Windows 2000 Server	Windows 2000 Advanced Server	Windows Server 2003, Standard Edition	Windows Server 2003, Enterprise Edition	Windows Server 2003 R2, Enterprise Edition
10.1.0.3	6.0	6.0	6.0 7.0 7.1	6.0 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.1.0.3 RAC	6.0	6.0	6.0 7.0 7.1	6.0 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.1.0.4	6.0 SP9 (or later)	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.1.0.4 RAC	6.0 SP9 (or later)	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.1.0.5	6.0 SP14 (or later)	6.0 SP14 (or later)	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.1.0.5 RAC	6.0 SP14 (or later)	6.0 SP14 (or later)	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.2.0.2	6.0 SP10 (or later)	6.0 SP10 (or later)	6.0 SP10 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.2.0.2 RAC	6.0 SP10 (or later)	6.0 SP10 (or later)	6.0 SP10 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1

Table 5-2. Oracle database and Sun Solaris platform support for PPM Center versions (page 1 of 2)

Oracle Version	Solaris 8	Solaris 9	Solaris 10
9.2.0.5	6.0	6.0	6.0 SP9 (or later)
9.2.0.5 RAC	6.0	6.0	6.0 SP9 (or later)
9.2.0.6	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP9 (or later)
9.2.0.6 RAC	6.0 SP2 (or later)	6.0 SP2 (or later)	6.0 SP9 (or later)
9.2.0.7	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1
9.2.0.7 RAC	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1
10.1.0.3	6.0	6.0 7.0 7.1	6.0 SP9 (or later) 7.0 7.1
10.1.0.3 RAC	6.0	6.0 7.0 7.1	6.0 SP9 (or later) 7.0 7.1
10.1.0.4	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1
10.1.0.4 RAC	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	6.0 SP9 (or later) 7.0 7.1

Table 5-2. Oracle database and Sun Solaris platform support for PPM Center versions (page 2 of 2)

Oracle Version	Solaris 8	Solaris 9	Solaris 10
10.1.0.5	6.0 SP14 (or later)	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.1.0.5 RAC	6.0 SP14 (or later)	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.2.0.1	6.0 SP10 (or later)	6.0 SP10 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.2.0.1 RAC	6.0 SP10 (or later)	6.0 SP10 (or later) 7.0 7.1	6.0 SP10 (or later) 7.0 7.1
10.2.0.2		7.0 7.1	7.0 7.1
10.2.0.2 RAC		7.0 7.1	7.0 7.1

Table 5-3. Oracle database and HP-UX platform support for PPM Center versions (page 1 of 2)

Oracle Version	HP-UX 11i v1	HP-UX 11i v2
9.2.0.5	6.0	6.0 SP11 (or later)
9.2.0.5 RAC	6.0	6.0 SP11 (or later)
9.2.0.6	6.0 SP2 (or later)	6.0 SP11 (or later)
9.2.0.6 RAC	6.0 SP2 (or later)	6.0 SP11 (or later)
9.2.0.7	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
9.2.0.7 RAC	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.3	6.0 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.3 RAC	6.0 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.4	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.4 RAC	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1

Table 5-3. Oracle database and HP-UX platform support for PPM Center versions (page 2 of 2)

Oracle Version	HP-UX 11i v1	HP-UX 11i v2
10.1.0.5	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.1.0.5 RAC	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.2.0.1	6.0 SP10 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.2.0.1 RAC	6.0 SP10 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.2.0.2	7.0 7.1	7.0 7.1
10.2.0.2 RAC	7.0 7.1	7.0 7.1

Table 5-4. Oracle database and SUSE Linux platform support for PPM Center versions (page 1 of 2)

Oracle Version	SUSE Linux Enterprise 9
9.2.0.7	6.0 SP12 (or later) 7.0 7.1
9.2.0.7 RAC	6.0 SP12 (or later) 7.0 7.1
10.1.0.3	6.0 SP12 (or later) 7.0 7.1
10.1.0.3 RAC	6.0 SP12 (or later) 7.0 7.1
10.1.0.4	6.0 SP12 (or later) 7.0 7.1
10.1.0.4 RAC	6.0 SP12 (or later) 7.0 7.1

Table 5-4. Oracle database and SUSE Linux platform support for PPM Center versions (page 2 of 2)

Oracle Version	SUSE Linux Enterprise 9
10.1.0.5	6.0 SP14 (or later) 7.1
10.1.0.5 RAC	6.0 SP14 (or later) 7.1
10.2.0.2	6.0 SP12 (or later) 7.0 7.1
10.2.0.2 RAC	6.0 SP12 (or later) 7.0 7.1

Table 5-5. Oracle database and IBM AIX platform support for PPM Center versions (page 1 of 2)

Oracle Version	AIX 5L Version 5.2	AIX 5L Version 5.3
9.2.0.5	6.0	6.0 SP11 (or later)
9.2.0.5 RAC	6.0	6.0 SP11 (or later)
9.2.0.6	6.0 SP2 (or later)	6.0 SP11 (or later)
9.2.0.6 RAC	6.0 SP2 (or later)	6.0 SP11 (or later)
9.2.0.7	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
9.2.0.7 RAC	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.3	6.0 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.3 RAC	6.0 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.4	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.1.0.4 RAC	6.0 SP9 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1

Table 5-5. Oracle database and IBM AIX platform support for PPM Center versions (page 2 of 2)

Oracle Version	AIX 5L Version 5.2	AIX 5L Version 5.3
10.1.0.5	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.1.0.5 RAC	6.0 SP14 (or later) 7.1	6.0 SP14 (or later) 7.1
10.2.0.2	6.0 SP10 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1
10.2.0.2 RAC	6.0 SP10 (or later) 7.0 7.1	6.0 SP11 (or later) 7.0 7.1

Table 5-6. Oracle database and Red Hat Linux platform support for PPM Center versions (page 1 of 2)

Oracle Version	Red Hat Linux Advanced Server 2.1	Red Hat Enterprise Linux AS 3.0	Red Hat Enterprise Linux AS 4.0
9.2.0.5	6.0	6.0	
9.2.0.5 RAC	6.0	6.0	
9.2.0.6	6.0 SP2 (or later)	6.0 SP2 (or later)	
9.2.0.6 RAC	6.0 SP2 (or later)	6.0 SP2 (or later)	
9.2.0.7	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	7.0 7.1
9.2.0.7 RAC	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	7.0 7.1
10.1.0.3	6.0	6.0 7.0 7.1	7.0 7.1
10.1.0.3 RAC	6.0	6.0 7.0 7.1	7.0 7.1
10.1.0.4	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	7.0 7.1
10.1.0.4 RAC	6.0 SP9 (or later)	6.0 SP9 (or later) 7.0 7.1	7.0 7.1

Table 5-6. Oracle database and Red Hat Linux platform support for PPM Center versions (page 2 of 2)

Oracle Version	Red Hat Linux Advanced Server 2.1	Red Hat Enterprise Linux AS 3.0	Red Hat Enterprise Linux AS 4.0
10.1.0.5	6.0 SP14 (or later)	6.0 SP14 (or later) 7.1	7.1
10.1.0.5 RAC	6.0 SP14 (or later)	6.0 SP14 (or later) 7.1	7.1
10.2.0.1	6.0 SP10 (or later)	6.0 SP10 (or later) 7.0 7.1	7.0 7.1
10.2.0.1 RAC	6.0 SP10 (or later)	6.0 SP10 (or later) 7.0 7.1	7.0 7.1
10.2.0.2		7.0 7.1	7.0 7.1
10.2.0.2 RAC		7.0 7.1	7.0 7.1

HP Object Migrator and HP GL Migrator

Table 5-7 details the versions of Oracle E-Business Suite that are supported by the various versions of the Kintana Object Migrator, HP Object Migrator, Kintana GL Migrator, HP GL Migrator and PPM Center. Refer to the *System Requirements and Compatibility Matrix* for further details.

Versions that are not supported for version 7 are shown in the lightly shaded areas.

Table 5-7. Oracle E-Business Suite and Migrator support for PPM Center versions (page 1 of 2)

Oracle E-Business Suite Version	Kintana Object* Migrator Version 5.1	HP Object Migrator Version 6.0	Kintana GL*Migrator Version 2.0	HP GL Migrator Version 6.0
10.7	6.0	6.0	6.0	6.0
11–11.5.1	6.0	7.0	6.0	6.0
	7.0	7.1	7.0	7.0
	7.1		7.1	7.1
11.5.2–11.5.6	6.0	6.0		6.0
	7.0	7.0		7.0
	7.1	7.1		7.1
11.5.7 Application Object Library: FND.E Applications DBA: AD.F Common Modules: AK.D Financials Suite: Family Pack A	6.0	6.0		6.0
	7.0	7.0		7.0
	7.1	7.1		7.1
11.5.8 Application Object Library: FND.F Applications DBA: AD.G Common Modules: AK.E Financials Suite: Family Pack C	6.0	6.0		6.0
	7.0	7.0		7.0
	7.1	7.1		7.1
11.5.9 ^a Application Object Library: FND.G Applications DBA: AD.H Common Modules: AK.F Financials Suite: Family Pack D	6.0	6.0		6.0
	7.0	7.0		7.0
	7.1	7.1		7.1

Table 5-7. Oracle E-Business Suite and Migrator support for PPM Center versions (page 2 of 2)

Oracle E-Business Suite Version	Kintana Object* Migrator Version 5.1	HP Object Migrator Version 6.0	Kintana GL*Migrator Version 2.0	HP GL Migrator Version 6.0
11.5.10 with FND.H Mini Pack ^{a, b, d} Application Object Library: FND.H Applications DBA:AD.I Common Modules: AK.G Financials Suite: Family Pack F		6.0 with Extension for Oracle E-Business Suite SP1 7.0 7.1		6.0 7.0 7.0
11.5.10.2 (CU2) ^{c, d} Application Object Library:FND.H Applications DBA: AD.I.3 Common Modules: AK.G Financials Suite: Family Pack F		6.0 with Extension for Oracle E-Business Suite SP1 7.0 7.0		6.0 7.0 7.1

- a. 11.5.8 with the FND.G Mini Pack is functionally equivalent to 11.5.9.
- b. 11.5.8-11.5.9 with the FND.H Mini Pack is functionally equivalent to 11.5.10 (for HP Object Migrator).
11.5.8-11.5.9 with the Financials Family Pack F is functionally equivalent to 11.5.10 (for HP GL Migrator).
- c. See the HP Object Migrator Oracle Apps Version 11.5.10.2 Compatibility Patch (#174141) readme (available on the PPM Download Center) for details.
- d. Support for the Oracle Applications eBusiness Suite version 11.5.10 with the 10G database version requires installation of patch154770. See the HP Object Migrator Version 6.0 Database version 10G Compatibility Patch (#154770) readme (available on the PPM Download Center) for details.

HP Deployment Management Extension for Oracle E-Business Suite

Table 5-8 details the versions of Oracle E-Business Suite that are supported by the various versions of the HP Deployment Management Extension for Oracle E-Business Suite and PPM Center.

Versions that are not supported in version 7 are shown in the lightly shaded areas.

Table 5-8. E-Business Suite and extension support for PPM Center versions
(page 1 of 2)

Oracle E-Business Suite Version	Mercury Change Management Extension for Oracle E-Business Suite Version 6.0.0	HP Deployment Management Extension for Oracle E-Business Suite Version 7.0.0	HP Deployment Management Extension for Oracle E-Business Suite Version 7.1.0
10.7	6.0		
11–11.5.6	6.0	7.0	7.1
11.5.7 Application Object Library: FND.E Applications DBA: AD.F Common Modules: AK.D Financials Suite: Family Pack A	6.0	7.0	7.1
11.5.8 Application Object Library: FND.F Applications DBA: AD.G Common Modules: AK.E Financials Suite: Family Pack C	6.0	7.0	7.1
11.5.9 ^a Application Object Library: FND.G Applications DBA: AD.H Common Modules: AK.F Financials Suite: Family Pack D	6.0	7.0	7.1

Table 5-8. E-Business Suite and extension support for PPM Center versions
(page 2 of 2)

Oracle E-Business Suite Version	Mercury Change Management Extension for Oracle E-Business Suite Version 6.0.0	HP Deployment Management Extension for Oracle E-Business Suite Version 7.0.0	HP Deployment Management Extension for Oracle E-Business Suite Version 7.1.0
11.5.10 ^{a, b} Application Object Library: FND.H Applications DBA:AD.I Common Modules: AK.G Financials Suite: Family Pack F	6.0 with Extension for Oracle E-Business Suite SP1	7.0	7.1
11.5.10.2 (CU2) ^b Application Object Library:FND.H Applications DBA: AD.I.3 Common Modules: AK.G Financials Suite: Family Pack F	6.0 with Extension for Oracle E-Business Suite SP1	7.0	7.1

- a. 11.5.8 with the FND.G Mini Pack is functionally equivalent to 11.5.9.
- b. 11.5.8-11.5.9 with the FND.H Mini Pack is functionally equivalent to 11.5.10.

Index

A

- Accelerators
 - version 7 features 31
 - version 7 functional impacts 49
- access grants
 - version 7 upgrade impacts 67
- Adapters
 - version 7 features 31
 - version 7 functional impacts 49

B

- Brazilian Portuguese language support 12

C

- cascading style sheets
 - version 7 upgrade impacts 52
- Change Management
 - See* Deployment Management.
- corporate logos
 - version 7 upgrade impacts 52
- custom solutions
 - cascading style sheets 52
 - corporate logos 52
 - version 7 upgrade impacts 52

D

- Dashboard
 - version 7 features 32
- data models
 - version 7 upgrade impacts 59
- Demand Management
 - See also* Extensions.
 - version 7 features 27
 - version 7 functional impacts 47
 - Web services support 31
- Deployment Management

- version 7 features 26
- version 7 functional impacts 47
- disk space requirements
 - version 7 impacts 82
- documentation
 - version 7 features 34

E

- Extensions
 - version 7 features 31
 - version 7 functional impacts 49

F

- Financial Management
 - version 7 features 25
 - version 7 functional impacts 46
 - Web services support 31
- French language support 12

G

- German language support 12

H

- highlights, release
 - version 7.0 12
 - version 7.1 12

I

- integrating
 - Microsoft Project 20
 - Web services 48
- Italian language support 12

K

- Korean language support 12

L

languages

See national language support.

licenses

portfolio optimization 48

version 7 functional impacts 48

version 7 upgrade impacts 69

M

Microsoft Project integration

version 7 features 20

version 7 functional impacts 43

version 7 upgrade impacts 57

Microsoft Project Plug-In

version 7 features 20

N

national language support 12

O

object types

version 7 upgrade impacts 62

optimization, portfolio

version 7 features 21

version 7 license impact 48

Oracle

version 7 impacts 91

P

plug-in for Microsoft Project 20, 43

Portfolio Management

version 7 features 21

version 7 functional impacts 44

portlets

version 7 functional impacts 41

version 7 upgrade impacts 73

post-upgrade activities 56

PPM Dashboard

See Dashboard.

PPM Workbench

See Workbench.

pre-upgrade activities 56

Program Management

version 7 features 26

version 7 functional impacts 46

Project Management

version 7 features 16

version 7 functional impacts 38

version 7 upgrade impacts 53

Web services support 31

project overview page 17

project type 16, 20

R

references

version 7 upgrade impacts 56

reports

version 7 features 24

version 7 functional impacts 39, 40, 41, 46

version 7 upgrade impacts 71

request header type

version 7 upgrade impacts 61

request type

version 7 upgrade impacts 61

Resource Management

version 7 features 22

version 7 functional impacts 44

Web services support 32

role 22, 25

S

security group

version 7 upgrade impacts 66

server.conf file

version 7 impacts 82

skill 22

See also role.

Spanish language support 12

special commands

- version 7 upgrade impacts 62
- standard interface
 - version 7 features 32
- summary tasks 25, 39

- version 7 features 34
- workflows
 - version 7 upgrade impacts 70

T

- Time Management
 - version 7 features 24
 - version 7 functional impacts 45
 - Web services support 32
- time periods
 - version 7 features 23, 25
- time sheets
 - version 7 license impacts 48
- tokens
 - version 7 upgrade impacts 76

U

- upgrade
 - follow-up activities 56
 - preparing 56

V

- validations
 - version 7 upgrade impacts 77

W

- Web services
 - integration 48
 - version 7 features 31
 - version 7 functional impacts 48
- work plan templates
 - version 7 features 16
 - version 7 functional impacts 43
- work plans
 - Microsoft Project integration 43
 - version 7 features 16
 - version 7 functional impacts 38, 44
 - version 7 upgrade impacts 54, 58
- Workbench

