HP Project and Portfolio Management Center Software Version 7.1 Service Pack 11

Release Notes

Software version: 7.1 SP11 / July 31 2009

This document provides an overview of the changes made to HP Project and Portfolio Management Center (PPM Center) for Version 7.1 Service Pack 11. It contains important information not included in the manuals. The document also includes details about changes in Service Packs 6 through 10.

The Service Pack 4 Release Notes contain details about Service Packs 1 through 4, and the Service Pack 5 Release Notes contain details about Service Pack 5. You can download these documents from the HP Software Product Manuals site at: **http://support.openview.hp.com/selfsolve/manuals.**

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In This Version

The following enhancements are included in Service Pack 11:

- Prevalidation check of non-synchronized data between HP Project Management and HP Time Management during installation of the Service Pack. For more information, see Installation Notes.

- Several security enhancements have been made.

- Performance is optimized when saving staffing profile assignments.

- Performance is optimized when opening programs.

- The following currencies are now available in PPM Center: Zambian Kwacha (ZMK), Uganda Shilling (UGX), Seychelles Rupee (SCR), Mauritius Rupee (MUR), and Ghana Cedi (GHS).

  Note: Ghana Cedi (GHS) is supported on the Sun JDK 1.5 Update 19, but not on the IBM JDK software that PPM Center version 7.1 Service Pack 11 supports (see the *System Requirements and Compatibility Matrix* for detailed information about the IBM JDK software).

The following certification is included in Service Pack 11:

- Support for Java 1.5 for Business

Documentation Updates

The first page of this release notes document contains the following identifying information:

- Version number, which indicates the software version.
- Publish date, which changes each time the document is updated.

To check for recent updates or to verify that you are using the most recent edition, visit the following URL:

http://h20230.www2.hp.com/selfsolve/manuals

This site requires that you register for an HP Passport and sign-in. To register for an HP Passport ID, go to:

http://h20229.www2.hp.com/passport-registration.html

Or click the **New users - please register** link on the HP Passport login page.

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

NOTE: To view files in PDF format (`*.pdf`), Adobe Reader must be installed on your system. To download Adobe Reader, go to the following web site:
http://www.adobe.com/

Installation Notes

If you intend to use the HP Document Management module, you should install Documentum Foundation Classes 5.3 prior to installing SP11. For installation instructions, see the *HP Document Management Guide and Reference* at the following URL:

http://h20230.www2.hp.com/selfsolve/manuals.

If you are installing a Language Pack, see the Readme file that accompanied your Language Pack software.

Installing Service Packs

IMPORTANT: HP PPM Center Hot Fixes and Service Pack Installation

In certain circumstances HP Software Support may provide you with a Hot Fix (also known as a "one-off patch"). These circumstances are rare and are only performed for critical issues. If you have previously implemented a Hot Fix and are planning to install a new Service Pack, please verify that your Hot Fix is included in the Service Pack prior to installing it. Due to potential compatibility issues, it is important that you DO NOT simply reapply the same Hot Fix on top of the new Service Pack. Hot Fixes are listed in the Service Pack release notes by Defect Number and sometimes also a Support Ticket Number that corresponds to the defect it addresses. If you do not see your Hot Fix listed in the Service Pack release notes, please contact HP Software Support for verification. You may also want to revalidate the fix provided by the Hot Fix in a Test instance before applying the Service Pack in your Production instance.

If you have installed Service Pack 8, you must install the Service Pack 8 patch before you can install Service Pack 9 or later. See Prerequisite If You Have Installed Service Pack 8 for more information. If you have not installed Service Pack 8, HP recommends that you install Service Pack 11 instead of installing Service Pack 8 and its patch. You can directly install Service Pack 11 on top of any previous Service Pack other than Service Pack 8.

The following steps 1- 6, 8, 10 and 11 apply to all installations of a Service Pack except Service Pack 8.

Steps 7 and 9 apply only to Service Pack 11. During installation of Service Pack 11, in addition to the previous prerequisite checks, a new prevalidation script checks for non-synchronized projects between the HP Project Management and HP Time Management modules.

- If non-synchronized projects are found, a prerequisite check error message appears, and the installation is aborted. In addition, in the prerequisite check log file (see step 7 for the file location), you can find an error message that indicates that non-synchronized projects are found. The log file also prompts you to take the required actions (see steps 7 and 9).

- If non-synchronized projects are not found, steps 7 and 9 are not required.

Step 12 applies only when you are upgrading to Service Pack 9 or later from Service Pack 8 or earlier; if you are upgrading from Service Pack 9 or later, this step is not required.

Note: In the following steps, *<SP_version>* represents the version number of the Service Pack being installed (for example, "11" for Service Pack 11).

To install a Service Pack, follow these steps:

1 Back up your database.

2 Stop the PPM Server. The Service Pack cannot be installed on an active server.

3 Verify that the JAVA_HOME environment variable is set to JDK 1.5.

4 Copy the Service Pack file mitg-710-SP*<SP_version>*.jar to the *<PPM_Home>* directory. This is the directory where the PPM server is installed.

5 Change to the *<PPM_Home>*/bin directory.

6 Start the installation using the following command: sh ./kDeploy.sh -i SP*<SP_version>*

7   For Service Pack 11 installations only, if a prerequisite check failure error appears and the prerequisite check log file (located in the `<PPM_Home>/logs/deploy/710/SP11` directory) indicates that some of your projects are not synchronized between HP Time Management and HP Project Management, do the following:

    a   Run the `MarkPMTMActualsOutOfSync.sql` database script against the PPM Center database. This script is located in the `<PPM_Home>/deploy/710/SP11/phases/prevalidation` directory.

        NOTE: Running this script marks the non-synchronized projects. When you restart the installation, the prevalidation check will ignore the marked non-synchronized projects so that the installation can complete successfully.

    b   Start the installation again using the following command: `sh ./kDeploy.sh –i SP11`

8   Follow the on-screen instructions to complete the Service Pack installation.

9   For Service Pack 11 installations only, if any non-synchronized projects are found in step 7, run the following command to synchronize the data: `sh ./kPMTMSync.sh -username <username> -password <password>`.

    For more information about how to synchronize the non-synchronized projects, see Synchronizing Actuals from HP Time Management to HP Project Management.

10 Compile the new JSP files using the following command: `sh ./kJSPCompiler.sh`

11 Start the PPM Server.

12 Only when you are upgrading from Service Pack 8 or earlier, reinstall the PPM Center Windows service by running the following scripts from the `<PPM_HOME>/bin` directory:

    ```
    ksvc remove-all
    ksvc install-all
    ```

Prerequisite If You Have Installed Service Pack 8

If you have installed Service Pack 8, you must also install the Service Pack 8 patch (`PPMC 7.1 Service Pack 8 Fix`, patch number `PPMC_00078`) before you can install Service Pack 9 or later.

To download the Service Pack 8 patch, follow these steps:

1 Go to **http://h20230.www2.hp.com/patches/patch_index.jsp** (this site requires that you register for an HP Passport and sign-in; see Documentation Updates for more information).

2 Select the **Project and Portfolio Management** product.

3 Enter the keywords `PPMC Service Pack 8 Fix.`

4 Click **Search.**

5 From the search results, click **PPMC 7.1 Service Pack 8 Fix.**

6 Follow the instructions to install the patch.

Synchronizing Actuals from HP Time Management to HP Project Management

With Service Pack 9 or later, you can use the actuals synchronization tool to synchronize actuals (actual start date, actual finish date, percent complete, and actual effort) from HP Time Management to HP Project Management.

Some of the features of the tool include:

- Multiple instances of the tool can be run at the same time.

- Synchronized values are rolled up. However, you may not see the values immediately. Values are rolled up based on when the roll-up service is run.

WARNING: For a project being synchronized, if any of the actuals data has been entered directly on a resource rather than by using HP Time Management, that actuals data will be lost by running the synchronization tool.

To use the actuals synchronization tool:

1 Back up the database. Changes made by the tool are not reversible.

2 From the PPM Server, change to the `<PPM_Home>`/bin directory.

3 Run the following command: `sh ./kPMTMSync.sh`

   The following arguments can be used:

Argument	Description
username	*Required.* Any existing PPM Center user who has the Edit All Projects access grant.
password	*Required.* The password for the PPM Center user.
projectno	Optional. The project number of the project to which the actuals are synchronized. The project number is available on the Search Projects page or in the Project Details tab of the project. If you also specify the `projectname` argument, the name must correspond to the project number. If neither the `projectno` nor the `projectname` argument is specified, all projects with a work plan SOURCE field that is set to NEEDS_TM_SYNC will be synchronized.

projectname	Optional. The project name of the project to which the actuals are synchronized. The project name is available on the Search Projects page or in the Project Details tab of the project. If you also specify the projectno argument, the number must correspond to the project name. If neither the projectno nor the projectname argument is specified, all projects with a work plan SOURCE field that is set to NEEDS_TM_SYNC will be synchronized.

Regenerating Web Service Stubs for Integrating with ServiceCenter

If you have integrated your PPM Center deployment with HP ServiceCenter, you can modify which fields are available through Web services, but you must regenerate the Web service stubs for the integration after installing any PPM Center service pack.

After installing the service pack, regenerate the Web service stubs in the PPM Server from the new Web Services Description Language (WSDL) descriptor as follows:

1 Navigate to the *<PPM_Home>*/bin/sdi directory on the PPM Server.

2 Run the script:

```
sh ./kGeneratePeregrineStub.sh <wsdl-url> <PPM_Server_Name>
```

where

— *<wsdl-url>* represents the ServiceCenter WSDL URL for Change Management

— *<PPM_Server_Name>* represents the subdirectory of *<PPM_Home>*/server specified during installation as the value for the KINTANA_SERVER_NAME parameter in the server.conf file. (It is not necessarily the actual host name of the server.) When generated, the stubs will be placed under this subdirectory.

For example, run the script:

```
sh ./kGeneratePeregrineStub.sh http://host:12670/ChangeManagement?wsdl kintana
```

NOTE: The stub configuration might fail if the host is not resolvable by name. To resolve the host by name, make an entry in the hosts file for the machine you want to connect. See the documentation for your operating system for the location of the hosts fil

Certifications and Fixes

This section includes information about the certifications and fixes in Service Pack 11.

Certifications

The following certification is added in Service Pack 11:

- Support for Java 1.5 for Business

  Starting with Service Pack 11, Java Platform Standard Edition for Business (build 1.5.0_16) is supported. For details, see the *System Requirements and Compatibility Matrix*.

Fixes

The following items (identified by a tracking number) are fixed in Service Pack 11:

N/A: Dashboard Foundation

PROBLEM: When a module has two or more filters out of which one filter token is used to fetch the value of another filter, the following error appears when importing the module: "`Dashboard object import failed: One of the tokens in the validation was unparseable. This can be caused by an invalid token name or missing data from the field the token represents. (KNTA-10073) select l.lookup_code, l.meaning (KNTA-11145)`". (206959)

1601413165: Dashboard Foundation

PROBLEM: When exporting a dashboard portlet to PDF, project names consisting of Russian (Cyrillic) characters are not displayed in the exported PDF. (201742)

1601759647: Demand Management

PROBLEM: Links to the requests might be broken when a request list is exported to Microsoft Excel. (202110)

1601876284: Project Management

PROBLEM: In the Project List portlet, a project's `Planned Start` field was shown as the first date of the project's `Planned Start Period`, and its `Planned Finish` field was shown as the last date of the project's `Planned Finish Period` (both periods are defined on the **Project Details** tab in the Project Overview page). This could lead to confusion with the project's actual `Planned Start` and `Planned Finish` dates. (204158)

1602491522: Project Management

PROBLEM: Long project names are not wrapped on the Create page or Edit page for work plans. (202798)

1602813757: Project Management

PROBLEM: When editing a work plan task for a project that is in shared control mode, the **Edit** > **Set Role** function fails with the following error: "`You do not have the privilege to take this action. Please consult your PPM Administrator.`" (204076)

1603236116: Platform

PROBLEM: The following currencies were not available in PPM Center: Zambian Kwacha (ZMK), Uganda Shilling (UGX), Seychelles Rupee (SCR), Mauritius Rupee (MUR), and Ghana Cedi (GHS). (203852)

1603308434: Integrations

PROBLEM: When importing requests using the XML loader, some requests failed with the following error: "`An HP internal error has occurred. Please contact HP Project and Portfolio Management support if the problem persists.(KNTA-10023)`" (205249)

1603335470: Project Management

PROBLEM: The printable Project Overview page does not show budget/cost data associated with projects. (203894)

1603375227: Project Management

PROBLEM: When synchronizing non-synchronized data between HP Project Management and HP Time Management modules, the `kPMTMSync.sh` script erases actual unassigned efforts. (205255)

1603408588: Platform

PROBLEM: Users are unable to configure secure RMI on an IBM AIX platform. (205247)

1603509568: Project Management

PROBLEM: When the browser's locale is not set to `English(United States)[en-us]`, opening a saved advanced search for projects and then clicking **Modify Search** could return the following stack trace error: "`Error parsing date/time string. (KNTA-10104).`" (204472)

1603580368: Project Management

PROBLEM: If a staffing profile is synchronized with a budget, when a user with sufficient permissions attempts to add a position to the staffing profile, the following error message appears: "`You do not have the privilege to take this action. Please consult your PPM Administrator.`" (204253)

1603635422: Costing

PROBLEM: When a user entered a value exceeding the allowed maximum number of whole digits in a budget line and then tabbed over to the next field in the form, the budget line became blank and the budget total remained at its previous value. No warning message was displayed.

Now budget lines allow up to eleven whole digits. If the value exceeds the maximum number of allowed whole digits, you will receive a warning message when you try to tab over to the next field: "`Your input is over the field limit. Only 11 whole number digits are allowed.`" (204229)

1603751504: Resource Management

PROBLEM: When changing the time approvers of multiple resources by mass-updating the resources, the following occurs:

- `billingApproverSecurityGroup` or `timeSheetApproverSecurityGroup` is not cleaned up when setting `billingApprover` or `timeSheetApprover`;
- `billingApprover` or `timeSheetApprover` is not cleaned up when setting `billingApproverSecurityGroup` or `timeSheetApproverSecurityGroup`. (204757)

1603783267: Integrations

PROBLEM: When synchronizing a project from Microsoft Project to PPM Center, if a resource in Microsoft Project has multiple matches in PPM Center, resource mapping automatically selects the first match it finds in PPM Center, without invoking the manual mapping process. (205858)

1603797896: Platform

PROBLEM: Out of Memory errors caused problems on a PPM Server services node. (206273)

1603797896: Project Management

PROBLEM: Project security is checked for each project task. This means a project security check might be running a number of times for one project, which is not efficient. (206274)

1603975063: Time Management

PROBLEM: The date format in the My Time Sheets portlet is not correct. (206369)

1604142469: Platform

PROBLEM: Secure RMI password is stored in plain text in `server.conf`. (204760)

1604196894: Demand Management

PROBLEM: When request search results are exported to Microsoft Excel, if a value in a column starts with a hyphen (-), the formats of some numeric or date fields (for example, Req #, Creation Date, and Last Updated) were not correct in the exported table. (204993)

1604287941: Project Management

PROBLEM: Incorrect email notifications about project tasks and milestones appeared because project baselines were not ignored for notifications. (205748)

1604308079: Platform

PROBLEM: Log files created by workflow steps do not recognize UNIX umask. They are always created with umask 022. (205465)

1604462400: Platform

PROBLEM: When creating a request through HP Demand Management Web services, the REQ.STATUS_NAME token cannot be recognized. (205931)

1604462400: Platform

PROBLEM: If a request has a multi-value field that is automatically completed by the triggering of a rule, when the request is created through HP Demand Management Web services to trigger the rule and multiple values are populated to the field, the field's validation fails no matter the values are valid or not. As a result, no value is populated to the field, and no error appears. (205932)

2603999681: Platform

PROBLEM: Token resolution fails intermittently under load. (205817)

2604943512: Project Management

PROBLEM: If the Microsoft Internet Explorer browser's locale is set to Chinese (Hong Kong S.A.R.)(zh-hk), when working on a project work plan whose Scheduled Fields Entry option is set to **Entering Scheduled Start and Scheduled Finish**, adding a task and changing the task's scheduled finish date does not update the task's scheduled duration, which always remains to be the default value (1 day). In addition, clicking **Done** in this case returns a warning message: "java.lang.IllegalArgumentException: The scheduled start date, scheduled finish date do not match the scheduled duration given." (204393)

2606100258: Time Management

PROBLEM: When running the Time Sheet Summary report with `Charge Code` as a filter, the following error appeared: "`HTTP response: 500 - javax.servlet.jsp.JspException: ORA-00904: "KLU"."MEANING": invalid identifier`". (205306)

2606398715: Project Management

PROBLEM: In the Project Gantt portlet, summary tasks of a project are not displayed even though the portlet preferences specifies that summary tasks should be included in the project Gantt chart. (205400)

2606823964: Costing

PROBLEM: A budget inherits the `Roll up actual costs from the work plan into the project budget` setting from a project when created from the Project Summary page, but does not inherit the setting when created from the Project Details page. (205770)

2608417225: Project Management

PROBLEM: When a project name contains certain special characters (for example, "&"), the project name is truncated (or even becomes blank) in the associated request page when logging an issue, a risk or a scope change for the project. (207170)

3600726822: Deployment Management

PROBLEM: The "sh kDeploy.sh -i SAP" command failed to deploy the HP Deployment Management Extension for SAP Solutions with the following error: "`Unable to import reference data because some primary keys are used by other reference data. Primary key values: 4015 (KNTA-10632)`". (199796)

3600999261: Platform

PROBLEM: Single sign-on fails with a certain combination of custom SiteMinder headers. (200247)

3601273603 : Dashboard

PROBLEM: When drilling down from a customized portlet to two or more portlets, the **Export to Excel** links disappear on the drill-down portlets. (200685)

3601441562: Demand Management

PROBLEM: If the browser locale is set to `English (Australia)[en-au]`, validation errors could occur for medium and short date formats when creating a request. For medium date validation, the day and month are swapped when day is less than 13 (for example, April 2, 2008 becomes Feb 4, 2008). For short date validation, the d/mm/yy format becomes the m/d/yy format. (201564)

3601613445: Integrations

PROBLEM: The words "Gantt View" are hardcoded in the PPM Plug-in for Microsoft Project. For this reason, an error occurs when synchronizing project work plan changes from PPM Center to a non-English version of Microsoft Project. (204141)

3601613445: Integrations

PROBLEM: If a user does not have permissions to write to log files, the following error message might appear when the user tries to retrieve actuals from PPM Center to Microsoft Project: "`An unexpected error occurred with the method.` (1004)". (206367)

3601711737: Dashboard

PROBLEM: After drilling down on a bar chart or pie chart portlet on the dashboard, attempts to export it to PDF returned a PDF generation failure error. (205814)

3602932841: Platform

PROBLEM: When there are more than 1,000 records in the `kcst_pending_ev_updates` table, running the Pending Cost EV Updates Service results in the following error message in the server logs: "`ORA-00907: missing right parenthesis.`" (202842)

3603114375: Project Management

PROBLEM: Under some circumstances the Cost Update Service could create large archive logs on the database. (205320)

3603219874: Demand Management

PROBLEM: When concurrent update operations are performed on a single Table Component field in a request, rows entered on an earlier operation no longer appear. (204008)

3603537947: Costing

PROBLEM: The following HP Financial Management errors occur on budget pages:

- In both Microsoft Internet Explorer and Mozilla Firefox, if a budget uses a custom budget category with a long name and the budget is capitalized, the arrow to the left of the budget line is invisible when the budget is opened in the View mode; This arrow is visible in the Modify mode, however, after clicking the arrow and then closing the pop-up window, the arrow disappears.

- In Microsoft Internet Explorer, when entering monthly spend values for budget lines in the Modify mode, users can only tab through "visible" months.

(203360)

3603676068: Project Management

PROBLEM: For projects with a certain health status, the project count displayed in the hover text in the Project Health Pie Chart portlet is different than that displayed in the pie chart drill-down portlet. (205248)

3603684693: Time Management

PROBLEM: When the time sheet policy requires entering time by `Period in Hours`, adding two or more activities to a time sheet leads to an HTML tag (`<span>`) being displayed in the `Time Period` column of the time sheet. (203930)

3603755432: Resource Management

PROBLEM: Negative zero hours could appear in the Resource Requests portlet. (204086)

3604748376: Integrations

PROBLEM: Synchronizing a project work plan from Microsoft Project to PPM Center causes the project's summary task level actuals in PPM Center to be lost. (205870)

3604752067: Resource Management

PROBLEM: No results are found in the Analyze Assignment Load portlet. (204475)

3604826247: Project Management

PROBLEM: By default, the PPM Plug-in for Microsoft Project will try to write information into a log file under the same directory where the plug-in is installed. If you have installed the PPM Plug-in for Microsoft Project in the default installation directory and have set up your environment security so that creating new files under a certain directory (for example, `C:\Program Files`) requires permission and manual confirmation, you cannot run the PPM Plug-in for Microsoft Project. (205815)

3605038417: Dashboard

PROBLEM: A security enhancement has been made. (204944, 206007)

3605160860: Platform

PROBLEM: A 500 Server error appeared when users entered invalid non-numeric data, such as very long text strings. (206006)

3605577872: Platform

PROBLEM: Mixing of secure and insecure LDAP servers in the `LDAP_URL_FULL` parameter was not allowed. (206431)

3605692869: Dashboard Foundation

PROBLEM: Clicking the **Export to Excel** link in a maximized portlet in Microsoft Internet Explorer might not display the `File Download` (Open/Save) dialog, depending on the browser's settings. (206276)

3606076152: Program Management

PROBLEM: Database connection problems could happen when running the Request Detail report on requests associated with programs. (206887)

4000250783: Resource Management

PROBLEM: In the Analyze Assignment Load portlet, actuals hours are not shown properly for resources on some requests. (203590)

1601445887, 3602753023, 3604871216: Resource Management

PROBLEM: Resource pool managers with sufficient permissions are not allowed to edit resource pool participation unless they have the Edit All Resource Pools access grant. (205626)

2606601401, 3605383711: Project Management

PROBLEM: In the Project Time Lines, Project Gantt, Project List, and Summary Task List portlets, a user can view all the projects (and their tasks) in a PPM Center instance regardless of their project security settings. These portlets should display only those projects whose Project Security settings allow the user to view them, as the Search Projects page does. (205771)

N/A: Program Management

PROBLEM:	Opening a program could take a long time when it contains projects with financial management enabled. (206418)

N/A: Resource Management

PROBLEM:	Saving a staffing profile assignment could take a long time. (206445)

N/A: Project Management

PROBLEM:	The Exception Rule Service throws an `ArrayIndexOutOfBoundsException` error after startup of the PPM Server. (206223)

SSRT080064: Platform

PROBLEM:	A security enhancement has been made for the redirector of PPM Center. (205345)

Known Problems, Limitations, and Workarounds

1-731467333: Dashboard

KNOWN PROBLEM:	Microsoft Internet Explorer returns a syntax error when the My Tasks portlet is collapsed and then expanded. (197384)

Enhancements, Integrations, Certifications, and Fixes in Previous Service Packs

This section describes the changes that were made in Service Packs 6 through 10.

Enhancements, Certifications, and Fixes in Service Pack 10

Enhancements

The following enhancement is included in Service Pack 10.

- A new action **Append/Move Members** is available in the Run PPM Organization Unit Interface report. This new action enables you to add members to a primary organization unit, or to move members from one primary organization unit to another, or to do both at the same time.

    See Adding / Reallocating Resources to Organization Units Using the Run PPM Organization Unit Interface Report for more information.

Adding / Reallocating Resources to Organization Units Using the Run PPM Organization Unit Interface Report

Previously, in the Run PPM Organization Unit Interface report, only the following three actions were available:

- No Change to Existing Members

- Replace All Existing Members

- Replace LDAP Members

In Service Pack 10, a new action **Append/Move Members** is available in this report.

Note:

- The new action is only available for primary organization units, that is, you cannot use this action to add members to a matrix organization unit, or to move members from/to a matrix organization unit.

The following are examples of how to use this new feature.

Example 1: Adding Members to an Organization Unit

An organization unit named OrgUnitA has 50 resources. Now you want to add 100 new resources to OrgUnitA.

To do so, follow these steps:

1 Insert the 100 new records into the `krsc_org_unit_members_int` interface table.

2 For each record, specify the target organization unit as OrgUnitA.

3 Use the **Append/Move Members** action to run the report.

After that, you have 150 resources in OrgUnitA.

Example 2: Moving Members from One Organization Unit to Another

There are 150 resources in OrgUnitA. Now you want to move 100 of them from OrgUnitA to another organization unit named OrgUnitB.

To do so, follow these steps:

1 Insert the 100 records into the `krsc_org_unit_members_int` interface table.

2 For each record, specify the target organization unit as OrgUnitB.

3   Use the **Append/Move Members** action to run the report.

After that, you have 50 resources left in OrgUnitA and 100 new resources in OrgUnitB.

Example 3: Adding and Moving Members to an Organization Unit

There are 50 resources in OrgUnitA and 100 resources in OrgUnitB. You want to add another 50 new resources to OrgUnitA and move 50 resources from OrgUnitB to OrgUnitA.

To do so, follow these steps:

1   Insert the 100 records (50 new for OrgUnitA and 50 from OrgUnitB) into the `krsc_org_unit_members_int` interface table.
2   For each record, specify the target organization unit as OrgUnitA.
3   Use the **Append/Move Members** action to run the report.

After that, you have 150 resources in OrgUnitA and 50 resources in OrgUnitB.

Certifications

The following certification is added in Service Pack 10:

- Support for Documentum 5.3 SP6

For new Document Management deployments, HP recommends that you install the following software:

- Version 5.3 SP6 of the Documentum Foundation Classes
- Version 5.3 SP6 of the Documentum Content Server
- Version 5.3 SP6 of the Documentum Index Server

For more information, see the *System Requirements and Compatibility Matrix*.

Fixes

The following items (identified by a tracking number) are fixed in Service Pack 10:

1603246597: Resource Management

PROBLEM:	Java graphical portlets displayed empty white boxes instead of the bar/chart images. (203869)

2217294319, 2600141452: Platform

PROBLEM:	If a file had Korean characters in its filename, the filename was corrupted after the file was downloaded. (201084)

3603672017: Demand Management

PROBLEM:	The Date Or Time Only field showed complete information instead of only date or time. (203159)

3601477364: Project Management

PROBLEM: A double slash (//) appeared after the ITG folder in reference URLs for projects. (201380)

3601403920: Resource Management

PROBLEM: A resource validation error occurred if users attempted to search for a specified Direct Manager when working on a work plan to edit assignments from a task. (200943)

3603440230, 1603128948 : Resource Management

PROBLEM: The Cancelled status as an option in the dropdown list of the staffing profile header page was missing. Users could not cancel a staffing profile. (202843, 204035)

3603479874: Project Management

PROBLEM: If a milestone was set to automatically complete when all previous milestones were complete, the milestone's actual start and finish dates were automatically overwritten with the scheduled start and finish dates. (202860)

2216295972: Demand Management

PROBLEM: Unlimited duplicate Req# columns appeared on the Request Browser result page. (200260)

2215505911: Resource Management

PROBLEM: The header and cells were misaligned in the Add Position dialog box when creating a Staffing Profile. (200261)

3600622259: Time Management

PROBLEM: When the percentage and actuals data appeared to be correct, users might still not be able to save a time sheet due to the following error: "actualeffort / (actualEffort + EstimatedRemainingEffort) * 100 must be equal to percentComplete (+-.5%)." (200262)

3603966538: Demand Management

PROBLEM: The Request Search Results section and the Request List portlet did not display dates according to configuration in the associated date field and user's locale preference. (203899)

NA: Project Management

PROBLEM: When scheduling a project task, users were allowed to enter "unreasonable" dates (for example, year 1099 or year 3027), which could lead to system overload when processing such long time spans. (203909)

3601225178: Dashboard

PROBLEM: The Request List portlet on a user's Shared Page showed data from other users when the user Sorted any column on the portlet. (203424)

2603603674: Time Management

PROBLEM: The Actual Time Summary and Time Sheet Summary reports took a long time to complete. (203713)

1600263654: Time Management

PROBLEM: Opening a time sheet might cause an error related to number formatting:
`java.lang.NumberFormatException: For input string: "154,00".` (200970)

1601953464: Project Management

PROBLEM: A stack trace error occurred when users were trying to add a resource to a task on which there was an external predecessor task with exceptions defined. (202504)

3603721031: Integrations

PROBLEM: When retrieving actuals from PPM Center to Microsoft Project, contributors' actuals were also retrieved. However, since contributors themselves were not synchronized to Microsoft Project, synchronizing Microsoft Project data back to PPM Center triggered an error: "Task Error. Can not remove resource from task."

Now, contributors as well as their actuals are no longer synchronized to Microsoft Project, that is, they exist only in PPM Center. (204068)

3603375951: Resource Management

PROBLEM: Users could not create any new staffing profiles for a project as a non-existing staffing profile was linked to the project. (203358)

3604335313: Demand Management

PROBLEM: An issue arose when PPM Center Web services were used to update a table component text field, that is, the visible parameter and hidden parameter fields were not the same. The hidden parameter showed as FILLME. (204267)

2602956483: Integrations

PROBLEM: When users clicked the "View Available Actions" link of a request in PPM Center while the corresponding defect was locked in Quality Center, the error message that appeared was not appropriate. (202605)

3603118055: Resource Management

PROBLEM: Removing a soft-booked resource from a staffing profile returned the position Status to New rather than Requested. (202996)

1602626615: Demand Management

PROBLEM: NPV values were not displayed correctly in the Request Search Results of a request type, because the Request Search Results section and Request List portlet did not honor Numeric or Currency validation settings. (202963)

3603650652: Integrations

PROBLEM: The integration of PPM Center with HP Universal CMDB failed when the encrypted HP Universal CMDB password contained special characters. (203187)

3603016373: Demand Management

PROBLEM: Saving a request draft triggered the "On field change" rules even when the user was not changing any values. (203169)

2604835634: Dashboard

PROBLEM: Performance of some Request List portlets suffered when Request Detail fields were used as a filter. (204357)

3603968508: Time Management

PROBLEM: The Actual Time Sheet and Time Sheet Summary reports used cancelled time sheets in their calculations. (203593)

1602634532: Project Management

PROBLEM: If a task that had subtasks was being deleted from a work plan, a SQL error might occur if there were too many subtasks:
`"com.mercury.itg.exceptions.InfrastructureException:org.hibernate.exception.S QLGrammarException: could not execute query."` (203105)

3602949742: Demand Management

PROBLEM: Performance of the Request List portlet in some cases might be slow due to improper optimization of the participant check. (202974)

3601584271, 3600382722, 3601130553: Resource Management

PROBLEM: By running the Run PPM Organization Unit Interface report with the REPLACE ALL EXISTING USERS option, users were not able to do the following:

- Move resources from a primary organization unit to another;
- Add resources to an existing primary organization unit.

(201102)

3603646940: Deployment Management

PROBLEM: An Out of Memory error might occur when choosing a file using the file chooser in the content migrator. (203937)

3604263879: Dashboard

PROBLEM: Users could not get any results back in the Analyze Assignment Load portlet after upgrade to PPM Center 7.1 SP9. (203938)

3602578934: Demand Management

PROBLEM: When files that were attached to a request had special characters in their filenames, the files might not be correctly downloaded using the Microsoft Internet Explorer 6.0 browser. (202601)

3603946906: Project Management

PROBLEM: Users might not be able to finish scheduling a project work plan when there were many critical tasks in the work plan. (204151)

1602569032: Project Management

PROBLEM: When all the tasks of a project were completed, if users ran a Baseline Comparison Report of this project with the **Include Completed Tasks** option unchecked, the following error occurred: "`HTTP response: 500 - javax.servlet.jsp.JspTagException: 'end' < 0.`"
(202872)

3602463051: Project Management

PROBLEM: After a project was created from a request, the Status field in the project details that appeared as a reference link on the request page was not automatically updated. (202135)

3602859275: Time Management

PROBLEM: When two or more users were saving time sheet lines at the same time for an identical task in their time sheets, one or more of them might receive the following message: "The Time Sheet or its Work Items has been updated by another user. Please refresh to continue with your changes." However, after the user(s) clicked **refresh**, the changes that the user(s) had made were lost. (202648)

1601296240: Platform

PROBLEM: The Cost Rollup Service failed with a null pointer exception during calculation of summary tasks. (203305)

1602717813: Demand Management

PROBLEM: The Available Actions page allowed non-manager users to take Bypass actions even if the parameter `com.kintana.core.server.RESTRICT_BYPASS_REQ_EXEC_TO_MANAGERS` in the `server.conf` file specified that only managers could take Bypass actions. (203058)

3601324596: Project Management

PROBLEM: After the `RM_OVERRIDE_ASSIGNMENT_CONTROLS` parameter was added to the `server.conf` file, the parameter did not function as expected. (200979)

3602448356: Demand Management

PROBLEM: When creating a request and clicking the available actions, the following message might appear: "Your workflow action could not be processed. The workflow action chosen is no longer eligible at this time." (203997)

3604443193: Project Management

PROBLEM: Project names were not correctly displayed when containing special characters such as "&". (204235)

4000182991: Program Management

PROBLEM: When users opened a program, the list of projects in the program was not consistently sorted in a certain order (for example, by project ID). (201408)

4000393221: Project Management

PROBLEM: Negative unmet demands were treated as positive in calculation of the Total Hours in the Staffing Profile Unmet Demand row. (203456)

3602844431: Deployment Management

PROBLEM: Users were unable to delete a package due to the following error: "DB Package error: ORA-01403: no data found {KDLV_PACKAGES_TH-505} (KNTA-10498)." (202266)

3600940864: Project Management

PROBLEM: The Project Timelines search portlet did not display programs that had budgets associated with them. (200304)

3604070480: Project Management

PROBLEM: The PV (Planned Value) calculation logic was not consistent with the new EV (Earned Value) calculation logic introduced at Service Pack 7. This inconsistency might cause CPI and SPI to be very low. (204010)

2603686630: Demand Management

PROBLEM: When a user was set to have a calendar with a decimal point in the hours (8.5 for example) for a working day, it caused a SQL error (KNTA-10521) if the Work Item Fields field group was used. (203230)

3603016683: Platform

PROBLEM: When creating a project from another by using the ksc_create_Project command from the execution step, the db session could not be released. (202794)

2604418324: Project Management

PROBLEM: If a user does not have the Edit Budget or Edit All Budgets access grants, the user cannot select any project for a Staffing Profile because of the following validation error: "One of the tokens in the validation was unparseable. This can be caused by an invalid token name or missing data from the field the token represents. (KNTA-10073)." (203971)

3603125070: Deployment Management

PROBLEM: When importing a request type, the following error occurred: "ORA-06503: PL/SQL: Function returned without value {KNTA_PARAMETER_SET_FIELDS_TH-}". (202559)

3603431605: Integrations

PROBLEM: When copying a request, if the user deleted any attached files of the request before submitting the new request, the ConcurrentModificationException error was returned. (203196)

1602469386: Resource Management

PROBLEM: When removing a user from an organization unit or moving a user to another organization unit, an exception page appeared, where unnecessary code level error information was displayed to users. (203204)

1600336784: Platform

PROBLEM: The "Default" label was not disabled for CST - Budget Labor Category or CST - Budget Non-Labor Category, which were auto-completed and therefore should not have a default value. (200878)

3600669363: Project Management

PROBLEM: When using the Mozilla Firefox browser, the workflow buttons on the Project Detail page were not getting refreshed. (199768)

3603557810: Project Management

PROBLEM: The characters "#@#" appeared between project manager names in advanced request search results. (202908)

NA: Platform

PROBLEM: The Exception Rule Service kept running for a long time without updating any information. (202956)

3603130803: Dashboard

PROBLEM: When the "Most Recent Note" column in a portlet was selected, the following error appeared: "ORA-06502: PL/SQL: numeric or value error: character string buffer too small==Error in the portlet". (202617)

1601901186: Demand Management

PROBLEM: When a request that had the text-4000 validation was copied by running special commands through the Workflow button, no more than 1800 characters of the request were copied. (202366)

NA: Resource Management

PROBLEM: Position details were not displayed in the hover text on the Staffing Profile page. (202389)

3601125398: Project Management

PROBLEM: When a user who was defined as a Project Manager attempted to edit a project work plan, a stack trace error occurred. (200328)

3603831361: Demand Management

PROBLEM: The multi-select delimiter ";" appeared as "@#@" in a field with the DLV- package validation. (203513)

3604243867: Project Management

PROBLEM: Saving time sheets caused a high level of CPU usage, which led to slowed server performance. (203983)

3602490604: Demand Management

PROBLEM: ORA-06502: PL/SQL error: Querying View MREQ_NOTE failed if a request field (4000 characters in length) notes/transaction history was set to "Yes". Return values of the PL/SQL function had a Maximum Length limit of 4000 characters (for VARCHAR2). (202616)

3603734985: Time Management

PROBLEM: Close or Freeze actions did not show in Timesheet Audit Trail logs. (203165)

3601769635: Project Management

PROBLEM: When users set up a portlet to retrieve certain information and then exported the information into Microsoft Excel, some values were displayed as "####################". (201596)

3603381043: Deployment Management

PROBLEM: A module's Request References portlet preferences were lost after the module was migrated to its destination. (202867)

3604148476: Time Management

PROBLEM: When the user started tabbing from a line in a time sheet, the lines the user tabbed to moved down on the right-hand side while the requests on the left-hand side did not move. (203994)

3600400422: Resource Management

PROBLEM: Staffing Profile and Resource Pool names of a staffing profile request might be truncated. (199019)

2602139225: Project Management

PROBLEM: Resource Breakdown values of a staffing profile might not be completely displayed because a scrollbar was not available. (202136)

3603862936: Demand Management

PROBLEM: If a request's fields contain certain control characters (any of the first 32 ASCII characters except TAB, LF and CR), the read operation through web service **http://PPM:PORT/itg/services/dm** will fail.

Note: This web service is not open to users, that is, it is for internal use only. For example, it is used when PPM Center integrates with Release Control.

(203229)

1602369622: Demand Management

PROBLEM: User's entries in Table Component fields of a request might not be correctly displayed. (202986)

3603664569: Time Management

PROBLEM: Once a user had logged time against a task in a project, no option was available in the Project Security settings that prevented this user from further logging time against the same task. (203288)

2603581310: Integrations

PROBLEM: The integration of PPM Center with HP Quality Center did not support HTTPS. (203972)

NA: Time Management

PROBLEM: When a user saves a time sheet after removing an existing task work item and adding it back, orphan time sheet lines corresponding to this task are created, which causes the task actuals to be out-of-sync with the time sheet. (205313)

NA: Time Management

PROBLEM: When a user saves a time sheet after removing an existing line from the time sheet and adding a new line with the same work item that was on the line just deleted, the page refreshes and the timesheet line added disappears. (203239)

Enhancements and Fixes in Service Pack 9

The following changes were made in Service Pack 9.

System Requirement Updates: Starting with PPM Center Version 7.1 Service Pack 9, Java 1.4 is no longer supported and use of Java 5 is required for clients requiring the PPM Workbench and the PPM Server. For more details, see the certification information of Service Pack 9 or the *System Requirements and Compatibility Matrix.*

Enhancements

The following enhancements were made:

- Mapping and synchronizing HP Project Management and Microsoft Project activities

- Synchronizing HP Project Management and Microsoft Project notes

- Changing fiscal years and periods

- Thresholds for Analyze Resource Pools and Analyze Assignment Load Portlets

- Exporting data from the Analyze Resource Pools and Analyze Assignment Load portlets

Mapping and Synchronizing HP Project Management and Microsoft Project Activities

Before you can map and synchronize activities, you must integrate HP Project Management and Microsoft Project by downloading and installing the Plug-in for PPM Center. See the *HP Project Management User's Guide* for more information.

About Activities in HP Project Management

Activities are simple configuration entities that can be associated with tasks in the project work plan. Tasks can be characterized by the type of activity involved in accomplishing the task. For example, certain tasks could be categorized as design activity while other tasks could be characterized as testing activity.

Although they can be used for simple categorization, activities are usually used to identify costs that can be capitalized for Statement of Position (SOP) 98-1 compliance. For example, activities marked as capitalized will categorize the costs of associated tasks as capital if the project supports capitalization. A project or task is identified as capitalized when it is associated with a capitalized activity.

HP Project Management comes with a pre-defined set of activities reflecting common SOP 98-1 categories that can be configured for use with tasks.

If you choose not to activate SOP 98-1 tracking, activities can still be associated with tasks as a categorization tool, and any associated costs will be considered operating expenses. That is, activities can be used even when SOP 98-1 functionality is not enabled, but they cannot be marked as capitalized, nor will projects or tasks associated with any activities track capitalization data.

NOTE: Activities can also be associated with requests and packages (but cannot be capitalized). However, only activities associated with tasks can be mapped and synchronized between HP Project Management and Microsoft Project.

For detailed discussion of configuring activities and activity behavior, see the *HP Financial Management User's Guide.*

Enabling Microsoft Project Integration Options: Activity Synchronization and Mapping

Activities in HP Project Management are mapped to and from the Text1-30 fields (by default, Text1) of Microsoft Project.

To enable activity mapping, from PPM Center, do the following:

1. Open the project

2. Click **Project Settings** in the Project Overview page.

3. Click **Microsoft Project Integration.**

4. In the Microsoft Field Mapping section, select **Enable Activity Synchronization.**

5. Select the Microsoft Project custom field (Text1-29) to map to HP Project Management activities. By default, Text1 is selected.

6. Click **Done.**

HP Project Management and Microsoft Project Activity Synchronization Modes

The synchronization mode of a project determines which application (PPM Center or Microsoft Project) has control over project information when updating information between HP Project Management and Microsoft Project.

- If HP Project Management controls all shared work plan information, activities are editable in PPM Center only. When PPM Center project information is transferred to Microsoft Project, the PPM Center Activity field is exported to Microsoft Project custom field Text1-29 (Text1, by default).

- If Microsoft Project controls all shared work plan information, activities are editable in Microsoft Project only. When the Microsoft Project work plan information is transferred to a PPM Center project, the Microsoft Project custom field Text1-29 (Text1, by default) is imported into the PPM Center Activity field.

- If control is shared, activities are controlled by and editable in Microsoft Project only. When the Microsoft Project work plan information is transferred to a PPM Center project, the Microsoft Project custom field Text1-29 (Text1, by default) is imported into the PPM Center Activity field.

Activity Synchronization Behavior in Microsoft Project

When synchronizing activities, you should either let the Plug-in for PPM generate the activity column in Microsoft Project or define the activity column in Microsoft Project using the label "Activity" and map the same custom field configured in the PPM Center project settings.

If the activity column is defined incorrectly (either the Microsoft Project column is not labeled "Activity" or the custom field used is not the same custom field configured in the PPM Center project settings), the following occurs:

	HP Project Management Controlled	**Microsoft Project Controlled or Shared Control**
Microsoft Project Column Label is Incorrect, Custom Field is Correct	When a PPM Center work plan is first opened from Microsoft Project, a column labeled "Activity" in Microsoft Project is created. If the "Activity" column is renamed, activities in PPM Center are still synchronized to the same (renamed) column in Microsoft Project.	Mislabeled activities in Microsoft Project are synchronized to activities in PPM Center. A warning message is logged.
Microsoft Project Column Label is Correct, Custom Field is Incorrect	When a PPM Center work plan is first opened from Microsoft Project, a column labeled "Activity" in Microsoft Project is created. If another column labeled "Activity" is added in Microsoft Project that is mapped to a different custom field (not the one configured in the PPM Center project settings), it is ignored during synchronization.	The column labeled "Activity" in Microsoft Project is not synchronized in PPM Center. Instead, another column labeled "Activity" is created that is mapped to the correct custom field. A warning message is logged to rename the initial column labeled "Activity."

NOTE: After the first synchronization, do NOT modify the column label or mapped custom field in Microsoft Project.

Activity Inheritance Behavior

Tasks and summary tasks can inherit their activity settings from their parent projects, making it unnecessary to manually set the activity for every task and summary task within a project.

Activity inheritance follows certain rules (activity inheritance behavior for integrated activities differs slightly from the activity inheritance behavior described in the *HP Financial Management User's Guide*):

- When an activity is set on a project, the same activity cascades down to all its children. These children will continue to inherit whatever their parent's activity setting is. If one of these children is moved to a different parent with a different activity setting, the child will acquire the new parent's activity setting.

- When a child with a different activity setting than its parent is found, the activity setting cascade stops and that child's activity setting is preserved. This child's activity setting will be preserved even if the child is indented, outdented, or cut-and-pasted under a different parent.

- In the case of a child with a different activity setting, manually setting that child's activity setting to that of its parent means that its activity setting will no longer be preserved, and will become that of its current parent.

- Manually setting a child's activity to an empty value will keep it empty, but it will not stay empty if the child is moved to a parent with a non-empty activity setting.

- If a summary task's parent changes its activity setting, the new activity will be applied to the summary task and all its children as well, unless the summary task's activity setting is different than its parent's, in which case the summary task and its children will remain untouched.

Additional rules regarding activity inheritance behavior:

- In HP Project Management controlled mode, when activities are synchronized, if a child's activity is empty in PPM Center, it will remain empty in Microsoft Project.

- In Microsoft Project controlled mode and shared controlled mode, when activities are synchronized, if a child's activity is empty in Microsoft Project, that child's activity will inherit its parent's activity in PPM Center.

Synchronizing HP Project Management and Microsoft Project Notes

Before you can synchronize notes, you must integrate HP Project Management and Microsoft Project by downloading and installing the Plug-in for PPM. See the *HP Project Management User's Guide* for more information.

About HP Project Management Notes

Notes are free-form text entered in the Task Details page and can contain up to 32K of information per work plan. Once saved, notes cannot be modified. Saved entries are marked with a timestamp. A user may submit multiple notes. Formatted text, OLE objects, and bitmaps (which are allowed in Microsoft Project notes) are not allowed in HP Project Management notes.

About HP Project Management Controlled Synchronized Notes

If HP Project Management controls the notes for the integration, all notes for a task are grouped together into one synchronized note, up to the synchronized note size limit (see Configuring Microsoft Project Integration Options: Notes Synchronization for more information). The notes are sorted by date in ascending order (the most current note is at the beginning of the synchronized note) and the timestamp and user who created the note are included with each note.

Configuring Microsoft Project Integration Options: Notes Synchronization

By default, both PPM Center and Microsoft Project limit the size of a synchronized note to 1,500 bytes. This limitation is only applicable for synchronized notes. That is, you can create and store notes larger than 1,500 bytes in PPM Center or in Microsoft Project, but the information that is synchronized between the two applications is limited.

In Microsoft Project, a synchronized note's size is not configurable. That is, the size of a synchronized note sent from Microsoft Project to PPM Center cannot be larger than 1,500 bytes and cannot be modified.

In PPM Center, a synchronized note's size is configurable. That is, the size of a synchronized note sent from PPM Center to Microsoft Project is determined by the MSP_NOTES_SIZE_LIMIT `server.conf` parameter.

To configure a synchronized note's size in PPM Center, edit the MSP_NOTES_SIZE_LIMIT parameter in `server.conf.` By default, a synchronized note's size is 1,500 bytes. Refer to the *System Administration Guide and Reference* for more information about editing the `server.conf` file.

Enabling Microsoft Project Integration Options: Notes Synchronization

You need to determine if notes will be used to track task data or actuals details. Once you have made this decision, this should be set as a project policy. Therefore, notes synchronization should be enabled at the project type level. Synchronization of notes in projects of the same project type should always be in the same direction (from PPM Center to Microsoft Project or from Microsoft Project to PPM Center).

To enable notes synchronization, from PPM Center, do the following:

1   Create or open an existing project type.

   To create a project type,

   a   Select **Administration > Project Types & Templates > Create Project Type.**

   To open an existing project type,

   b   Select **Administration > Project Types & Templates > Manage Project Types.**

   c   Click the project type.

2   Click **Microsoft Project Integration.**

3   In the Microsoft Field Mapping section, select **Enable Notes Synchronization.**

4   Select the Notes synchronization direction.

   If control of work plan information is shared, this selection indicates the type of data being stored in notes. For example, if control of work plan information is shared and you select **From PPM to Microsoft Project,** notes are considered to be actuals details. If you select **From Microsoft Project to PPM,** notes are considered to be task data.

5   Click **Create** or **Done.**

HP Project Management and Microsoft Project Notes Synchronization Modes

The synchronization mode of a project determines which application (PPM Center or Microsoft Project) has control over project information when updating information between HP Project Management and Microsoft Project.

- If HP Project Management controls all shared work plan information, notes are editable in PPM Center only. When PPM Center project information is transferred to Microsoft Project, each note along with its description, user, and timestamp, are consolidated into the Microsoft Project Notes field..

- If Microsoft Project controls all shared work plan information, notes are editable in Microsoft Project only. When the Microsoft Project work plan information is transferred to a PPM Center project, the Microsoft Project Notes field is imported into a single PPM Center Notes field. Formatted text, OLE objects, and bitmaps (which are allowed in Microsoft Project notes) are not allowed in HP Project Management notes.

- If control is shared, the application that controls and edits notes is determined by the Microsoft Project integration project settings of the project. See step 4 in Configuring Microsoft Project Integration Options: Notes Synchronization.

About Sending Work Plan Information from Microsoft Project to HP Project Management

In shared control mode, selecting **PPM > Update associated work plan in Microsoft Project** allows you to choose between the following options:

- **Send work plan information from MSP to PPM.** Send updated schedule information from Microsoft Project to HP Project Management. If this option is chosen, the integration refreshes the work plan schedule information in the associated work plan in HP Project Management based on the data in Microsoft Project. Any additional edits made in HP Project Management are retained. If the Microsoft Project work plan includes resources that cannot be mapped to resources in PPM Center, you will be asked to map these resources.

  Whenever you send a Microsoft Project file to HP Project Management, a backup copy of the `.mpp` file is automatically saved to the same directory in which the original file is stored, with the extension `.bak`.

  If you originally created the work plan in HP Project Management using a work plan template, tasks marked as required by the template cannot be deleted in Microsoft Project. Tasks that have actuals logged against them in HP Project Management cannot be removed from the Microsoft Project file. You must first remove the actuals if you intend to remove the tasks.

- **Retrieve actuals from PPM to Microsoft.** Retrieving actuals information from HP Project Management based on the project-level settings for integration. If this option is chosen, the integration retrieves actuals data from HP Project Management for your review and optional application.

When notes synchronization is enabled and you send work plan information from Microsoft Project to HP Project Management, notes synchronization behaves in the following manner:

Selected Option	Synchronization Direction	Results
Send work plan information from MSP to PPM	From Microsoft Project to PPM	Notes in Microsoft Project are synchronized in PPM Center.
	From PPM to Microsoft Project	Notes in Microsoft Project are not synchronized.
Retrieve actuals from PPM to MSP	From Microsoft Project to PPM	Notes in PPM Center are not synchronized.
	From PPM to Microsoft Project	Notes in PPM Center are synchronized in Microsoft Project.

Changing Synchronization Modes

If the synchronization mode of a project is changed from HP Project Management controlled to Microsoft Project controlled, notes initially entered in HP Project Management are deleted when the project is synchronized. To preserve notes initially entered in HP Project Management, synchronize the project to Microsoft Project BEFORE changing the synchronization mode.

Changing Fiscal Years and Periods

If your fiscal year differs from the calendar year (for example, your fiscal year starts in November, not January), you can modify period and period group data to affect how this information is displayed in budgets, benefits, scenario comparisons, portlets, reports, and so on. You can also add more periods to your period and period group data if you need to display or enter information beyond the currently displayed time period.

NOTE: Setting the fiscal year and periods requires changes to period and period group data in the database. Before making any changes to the database, HP recommends that you first back up your period and period group data. See Backing Up and Restoring Data for more information.

This section describes the following tasks used to set your fiscal year and periods:

- Backing up and restoring period and period group data from the database
- Changing the starting month of the fiscal year
- Changing period names
- Generating additional periods
- Changing a month's start and/or end dates
- Changing Resource Management time periods

Backing Up and Restoring Data

Before making any changes to your period and period group data in the database, HP recommends that you first back up your data. Backing up your period and period group data saves data from the KNTA_PERIODS and KNTA_PERIOD_GROUPS tables.

Backing Up Your Data

To back up your period and period group data:

1 On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

   `cd <PPM_Home>/bin`

   where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2 Enter the following command:

   `sh ./kGenPeriods.sh -backup <filename>`

   For example, if you want to save your data to files using the name `period_data_backup`, enter:

   `sh ./kGenPeriods.sh -backup period_data_backup`

   Data from the KNTA_PERIODS table is saved to the `period_data_backup.csv` file, and data from the KNTA_PERIOD_GROUPS table is saved to the `period_data_backup_groups.csv` file in the `<PPM_Home>/bin/periods` directory.

   NOTE: When specifying the filename, if no path is specified, the backup files are saved to `<PPM_Home>/bin/periods`. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

   See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

Restoring Your Data

Restoring your period and period group data overwrites the current data in the database. Unless the data in the database is corrupted, you may want to back up the current data before running the restore option.

CAUTION: If you have generated new periods and the data to be restored does not contain these new periods, the new periods are lost upon restore. This causes problems with benefits and/or budgets that use these new periods (after the restore, the benefits and/or budgets contain data for nonexistent periods).

To restore your period and period group data:

1 On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

   `cd <PPM_Home>/bin`

   where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2 Enter the following command:

   `sh ./kGenPeriods.sh -restore <filename>`

   NOTE: The files used to restore data must have been created using the `-backup` option.

   For example, if you are restoring your data from the backup files using the name `period_data_backup`, enter:

   `sh ./kGenPeriods.sh -restore period_data_backup`

   Data from the `period_data_backup.csv` file is restored to the KNTA_PERIODS table, and data from the `period_data_backup_groups.csv` file is restored to the KNTA_PERIOD_GROUPS table.

   NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename. If your backup files were created using a file extension other than `.csv`, specify the file extension in the filename when restoring the data.

   See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

Changing the Starting Month

If the starting month of your fiscal year is not January, you can change the starting month to be any month of the year. Period groups (quarters) are automatically adjusted according to the new starting month.

NOTE: If you change the starting month in HP Portfolio Management, HP recommends that you make the same changes in HP Resource Management. See Changing Resource Management Time Periods for more information.

If you have not changed the start and end dates of the months, you can change the starting month using the `kGenPeriods.sh` script.

If you have changed the start and end dates of the months, you can change the starting month by exporting, modifying, and importing a file.

Changing the Starting Month If a Month's Start and End Dates Have Not Changed

If you have not changed the month's start and end dates, to change the starting month of your fiscal year, do the following:

1   On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

    `cd <PPM_Home>/bin`

    where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2   Enter the following command:

    `sh ./kGenPeriods.sh -shift -fiscalStartMonth <month> -startMonthIsNextFiscalYear`

    `<true|false>`

    For example, if November is the start of your next fiscal year, enter:

    `sh ./kGenPeriods.sh -shift -fiscalStartMonth 11 -startMonthIsNextFiscalYear true`

    See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

3   Review the `shift_knta_periods_preview.csv` and `shift_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

4   When you are satisfied with the data generated in the preview files, run the command again but add the `-commit` option to make your changes to the database.

Changing the Starting Month If a Month's Start and End Dates Have Changed

If you have changed a month's start and end dates, to change the starting month of your fiscal year, do the following:

1 On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

   `cd <PPM_Home>/bin`

   where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2 Extract the period data. Enter the following command:

   `sh ./kGenPeriods.sh -export <filename>`

   For example, if you want to export the data to a file named `extracted_periods.csv`, enter:

   `sh ./kGenPeriods.sh -export extracted_periods`

   NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

   See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

3 Edit the data. Using Microsoft® Excel, modify the Fiscal Year and Month Sequence columns.

Column Name	Description
Fiscal Year	Specify the four-digit fiscal year to which this period belongs in YYYY format.
Month Sequence	Specify the month sequence (1 to 12) within the fiscal year where 1 is the first month of the fiscal year and 12 is the last month of the fiscal year.

4 Save the file.

5 Import the data. Enter the following command:

   `sh ./kGenPeriods.sh -import <filename>`

   For example, if you want to import the data from the file named `extracted_periods.csv`, enter:

   `sh ./kGenPeriods.sh -import extracted_periods`

   NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

   See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

6 Review the `import_knta_periods_preview.csv` and `import_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

7 When you are satisfied with the data generated in the preview files, run the command with the `-import` option again but add the `-commit` option to make your changes to the database.

Changing Period Names

Period names are displayed at various places in PPM Center, such as budget breakdowns. By default, the names of the quarters are shown as **Q1 2008, Q2 2008**, and so on, and the names of the months are shown as **Jan 08, Feb 08,** and so on, for example.

To change period names:

1   On the PPM Server, go to the directory that contains the sample period configuration file `fiscalPeriods_sample.conf`:

    `cd <PPM_Home>/bin/periods`

    where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2   Make a copy of the sample file and then edit it. You can edit the short and long period names, the quarter names, and the half-year names. See About the Period Configuration File for more information.

3   Save the file.

4   Navigate to the `<PPM_Home>/bin/kGenPeriods.sh` script.

5   Enter the following command:

    `sh ./kGenPeriods.sh -relabel -config <filename>`

    For example, if you named the file `myPeriodNames.conf,` enter:

    `sh ./kGenPeriods.sh -relabel -config myPeriodNames.conf`

    NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`.

    See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

6   Review the `relabel_knta_periods_preview.csv` and `relabel_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

7   When you are satisfied with the data generated in the preview files, run the command again but add the `-commit` option to make your changes to the database.

About the Period Configuration File

The period configuration file is used to define the names of the periods, quarters, and half-years. Create and edit this file to modify the existing names of periods, quarters, and half-years.

NOTE: If you changed the starting month of the fiscal year using the `-shift` option, the sequence of the periods is automatically adjusted.

For example, if you want the period names to be represented numerically, you would start by defining `short_name_period_1=1` and `long_name_period_1=1, short_name_period_2=2` and `long_name_period_2=2,` and continue until you have relabeled all the period names.

If the first month (period) in your fiscal year is November, adjust the sequence by defining `short_name_period_1=11` and `long_name_period_1=11, short_name_period_2=12` and `long_name_period_2=12,` and continue until you have relabeled all the period names.

A sample period configuration file is available in `<PPM_Home>/bin/periods/fiscalPeriods_sample.conf.`

Generating Additional Periods

You can add more periods (in yearly increments) to your period and period group data if you need to display or enter information beyond the currently displayed time period.

If you have not changed the start and end dates of the months, you can add more periods using the `kGenPeriods.sh` script.

If you have changed the start and end dates of the months, you can add more periods by exporting, modifying, and importing a file.

Adding Periods If a Month's Start and End Dates Have Not Changed

To add periods to your period and period group data if you have not changed the month's start and end dates, do the following:

1   On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

    `cd <PPM_Home>/bin`

    where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2   Enter the following command:

    `sh ./kGenPeriods.sh -startYear <year1> -endYear <year2>`

    For example, if you want to add periods from 2013 to 2025, enter:

    `sh ./kGenPeriods.sh -startYear 2013 -endYear 2025`

    NOTE: If part or all of the specified time period exists, it is not regenerated. If there is a gap between the end of the existing time period and the `startYear,` those periods are also generated. The total generated time period cannot exceed 30 years.

    See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

3   Review the `generate_knta_periods_preview.csv` and `generate_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

4   When you are satisfied with the data generated in the preview files, run the command again but add the `-commit` option to make your changes to the database.

Adding Periods If a Month's Start and End Dates Have Changed

To add periods to your period and period group data if you have changed the month's start and end dates, do the following:

1   On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

    `cd <PPM_Home>/bin`

    where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2   Extract the period data. Enter the following command:

    `sh ./kGenPeriods.sh -export <filename>`

    For example, if you want to export the data to a file named `extracted_periods.csv`, enter:

    `sh ./kGenPeriods.sh -export extracted_periods`

    NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

    See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

3   Edit the data. Using Microsoft Excel, add more periods to the end of the exported file.

    Add the following information:

Column Name	Description
Period ID	Leave this column blank. The system automatically generates the ID.
Fiscal Year	Specify the four-digit fiscal year to which this period belongs in YYYY format.
Month Sequence	Specify the month sequence (1 to 12) within the fiscal year where 1 is the first month of the fiscal year and 12 is the last month of the fiscal year.
Start Date	Specify the start date of the month in YYYY-MM-DD format.
End Date	Specify the end date of the month in YYYY-MM-DD format.

NOTE: Periods must be added in yearly increments. That is, you must add 12 periods. Also, there cannot be gaps (missing dates) between the end date of one period and the starting date of the next period.

4   Save the file.

5   Import the data. Enter the following command:

```
sh ./kGenPeriods.sh -import <filename>
```

For example, if you want to import the data from the file named `extracted_periods.csv`, enter:

```
sh ./kGenPeriods.sh -import extracted_periods
```

NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

6   Review the `import_knta_periods_preview.csv` and `import_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

7   When you are satisfied with the data generated in the preview files, run the command with the `-import` option again but add the `-commit` option to make your changes to the database.

Changing a Month's Start and End Dates

If the start date of your period is not the first day of the month and the end date of your period is not the last day of the month, you can change the start and end dates to be any day of the month.

CAUTION: If financial data exists and you change a month's start and end dates, the data becomes inaccurate and meaningless (because it is stored by months, not days).

NOTE: If you change a month's start and end dates in HP Portfolio Management, you must make the same changes in HP Resource Management. See Changing Resource Management Time Periods for more information.

To change a month's start and end dates:

1   On the PPM Server, go to the directory that contains the `kGenPeriods.sh` script:

    `cd <PPM_Home>/bin`

    where `<PPM_Home>` represents the path where your PPM Center instance is installed.

2   Extract the period data. Enter the following command:

    `sh ./kGenPeriods.sh -export <filename>`

    For example, if you want to export the data to a file named `extracted_periods.csv`, enter:

    `sh ./kGenPeriods.sh -export extracted_periods`

    NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

    See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

3   Edit the data. Using Microsoft Excel, modify only the Start Date and End Date columns.

Column Name	Description
Start Date	Specify the start date of the month in YYYY-MM-DD format.
End Date	Specify the end date of the month in YYYY-MM-DD format.

    There cannot be gaps (missing dates) between the end date of one period and the start date of the next period.

4   Save the file.

5   Import the data. Enter the following command:

    `sh ./kGenPeriods.sh -import <filename>`

    For example, if you want to import the data from the file named `extracted_periods.csv`, enter:

    `sh ./kGenPeriods.sh -import extracted_periods`

    NOTE: When specifying the filename, if no path is specified, `<PPM_Home>/bin/periods` is used as the default path. If a path is specified, it should be an absolute path or a path relative to `<PPM_Home>`. If no file extension is included in the specified filename, `.csv` is automatically appended to the filename.

    See Overview of the kGenPeriods.sh Script for more information about the options used in this command.

6   Review the `import_knta_periods_preview.csv` and `import_knta_period_groups_preview.csv` files in the `<PPM_Home>/bin/periods` directory.

7   When you are satisfied with the data generated in the preview files, run the command with the `-import` option again but add the `-commit` option to make your changes to the database.

    If you need to change the starting month of your fiscal year or generate additional periods after modifying a month's start and/or end dates, you cannot use the `kGenPeriods.sh` script. Instead, you must export the data, modify the file, and import the file. See Changing the Starting Month If a Month's Start and End Dates Have Changed or Adding Periods If a Month's Start and End Dates Have Changed for more information.

Saving Your Changes to the Database

Setting the fiscal year requires changes to period and period group data in the database. Before making any changes to the database, HP recommends that you first back up your period and period group data. See Backing Up and Restoring Data for more information.

When you run the script to change data, you must include the `-commit` option in order to save your changes to the database.

Changing Resource Management Time Periods

If you change a month's start and end date in HP Portfolio Management, you must make the same changes in HP Resource Management.

If you change the starting month in HP Portfolio Management, HP recommends that you make the same changes in HP Resource Management.

CAUTION: Editing the `periods.xml` file is complicated. HP strongly recommends backing up the PPM Server and contacting HP Professional Services for assistance.

To change HP Resource Management time periods:

1   On the PPM Server, go to the directory that contains the `periods.xml` file:

    `cd <PPM_Home>/conf/periods`

    where *<PPM_Home>* represents the path where your PPM Center instance is installed.

2   Edit the `periods.xml` file.

3   Navigate to the *<PPM_Home>*`/bin/kGenFlexibleTimePeriods.sh` script.

4   Update the time periods. Enter the following command:

    `sh ./kGenFlexibleTimePeriods.sh`

Overview of the kGenPeriods.sh Script

The following sections describe the syntax and optional parameters for the `kGenPeriods.sh` script.

Syntax

The syntax of the `kGenPeriods.sh` script is as follows:

```
kGenPeriods.sh
    [-h | -help]
    [-backup <filename>]
    [-restore <filename>]
    [-shift -fiscalStartMonth <month> -startMonthIsNextFiscalYear <true|false>]
    [-startYear <year1> -endYear <year2>]
    [-relabel -config <filename>]
    [-export <filename>]
    [-import <filename> [-config <filename>]]
    [-validate]
    [-fileEncoding <encoding>]
    [-commit]
```

Options

The following table lists the options for the `kGenPeriods.sh` script:

Option	Description
-backup <*filename*>	Copy data from the KNTA_PERIODS table to the <*filename*>.csv file and from the KNTA_PERIOD_GROUPS table to the <*filename*>_groups.csv file. When specifying the filename, if no path is specified, both files are saved in the <*PPM_Home*>/bin/periods directory. If a path is specified, it should be an absolute path or a path relative to <*PPM_Home*>. **NOTE:** .csv is automatically appended to the end of the filenames unless you specify a different file extension.
-commit	Commit changes to the database. If this option is not specified, any changes you make are not saved to the database.
-config <*filename*>	Specify the period configuration file. This file is used to relabel period names or when running an import and no period data exists in the database. When specifying the filename, if no path is specified, <*PPM_Home*>/bin/periods is used as the default path. If a path is specified, it should be an absolute path or a path relative to <*PPM_Home*>. Use with the -relabel or -import options. See About the Period Configuration File and the fiscalPeriods_sample.conf sample file for more information.

-endYear <*year*>	Generate additional periods (if they do not exist) up to the specified year (in YYYY format). Use with the -startYear option. If part or all of the specified time period exists, it is not regenerated. If there is a gap between the end of the existing time period and the startYear, those periods are also generated. The total generated time period cannot exceed 30 years.
-export <*filename*>	Export fiscal month data from the KNTA_PERIODS table to the <*filename*>.csv file. When specifying the filename, if no path is specified, <*PPM_Home*>/bin/periods is used as the default path. If a path is specified, it should be an absolute path or a path relative to <*PPM_Home*>. The file contains five columns of data: Period ID, Fiscal Year, Month Sequence, Start Date, and End Date. See the -import option for more information about these columns of data.
-fileEncoding <*encoding*>	Specify the encoding of the files used in the script. You may specify any IANA supported encoding such as ISO-8859-1 or GB2312. Default: UTF-8.
-fiscalStartMonth <*month*>	Specify the starting month of the fiscal year to which to shift. The month is in MM format (specify a number from 1 to 12). Use with the -shift and -startMonthIsNextFiscalYear options.
-h | -help	Display the command usage.
-import <*filename*>	Import fiscal month data from <*filename*>.csv to the KNTA_PERIODS and KNTA_PERIOD_GROUPS tables. If you want to create a new import file, you should copy and modify an existing exported file. When specifying the filename, if no path is specified, <*PPM_Home*>/bin/periods is used as the default path. If a path is specified, it should be an absolute path or a path relative to <*PPM_Home*>. The import file must have five columns: • **Period ID** should not be modified and should be left blank for new records • **Fiscal Year** specifies the four-digit fiscal year (YYYY format) • **Month Sequence** specifies the month sequence (1 to 12) within the fiscal year • **Start Date** specifies the start date of the month in YYYY-MM-DD format • **End Date** specifies the end date of the month in YYYY-MM-DD format If no period data exists in the database, you must specify a period configuration file. See the fiscalPeriods_sample.conf sample file.
-relabel	Relabel the period names based on the settings in period configuration file. Use with the -config option. See About the Period Configuration File and the fiscalPeriods_sample.conf sample file for more information.
-restore <*filename*>	Restore data from <*filename*>.csv to KNTA_PERIODS table and <*filename*>_groups.csv to KNTA_PERIOD_GROUPS table. When specifying the filename, if no path is specified, both files must be located in the <*PPM_Home*>/bin/periods directory. If a path is specified, it should be an absolute path or a path relative to <*PPM_Home*>. The files used to restore data must have been created using the -backup option. If your backup files were created using a file extension other than .csv, specify the file extension in the filename when restoring the data.

-shift	Shift the starting fiscal month of periods. Use with the `-fiscalStartMonth` and `-startMonthIsNextFiscalYear` options.
-startMonthIsNextFiscalYear <true|false>	Specify if the shifted start date is the start of the current fiscal year or the next fiscal year, where: • **true** indicates the shifted start date is the start of the next fiscal year • **false** indicates the shifted start date is the start of the current fiscal year Use with the `-shift` and `-fiscalStartMonth` options.
-startYear *<year>*	Generate additional periods (if they do not exist) from the specified year (in YYYY format). Use with the `-endYear` option. If part or all of the specified time period exists, it is not regenerated. If there is a gap between the end of the existing time period and the `startYear,` those periods are also generated. The total generated time period cannot exceed 30 years.
-validate	Validate existing period and period group data in the database. The status and outcome (succeeded or failed) of running the validation is displayed.

Thresholds for Analyze Resource Pools and Analyze Assignment Load Portlets

The Analyze Resource Pools portlet provides a way to assess planned load on resource pools by directly comparing the projected demand in a staffing profile or profiles to projected capacity in a resource pool or pools.

The Analyze Assignment Load portlet provides a tool for visualizing assignments that allows a manager to view workload sorted according to different criteria and levels of specificity, giving them better control and visibility over their resources' workload.

Data shown in each portlet can be filtered by setting the parameters in the portlet preferences. However, if large amounts of data are supplied, there may be portlet performance problems. Therefore, thresholds for these portlets can be specified in the `server.conf` file and default values are provided for optimal performance.

For the Analyze Resource Pools portlet, you can specify the following parameters.

- ARP_MAX_RESOURCES: the maximum number of total resources. The default value is 300.

- ARP_MAX_RESOURCE_POOLS: the maximum number of total resource pools. The default value is 30.

For the Analyze Assignment Load portlet, you can specify the following parameter.

- AAL_PORTLET_MAX_RESOURCES: the maximum number of total resources. The default value is 300.

When a threshold is exceeded, the portlet does not display. Instead, a message containing the threshold value and current value that exceeds the threshold appear. To make the portlet display, you can edit the preferences of the portlet so that the threshold is no longer exceeded. HP does not recommend that you increase the threshold values as this may cause performance problems.

If the amount of data you need to analyze exceeds the thresholds, you can export the data to Microsoft Excel. See Exporting Data for the Analyze Resource Pools and Analyze Assignment Load Portlets for more information.

See the *Resource Management User's Guide* for more information about these portlets. See the *System Administration Guide and Reference* for more information about specifying configuration parameter values.

Exporting Data from the Analyze Resource Pools and Analyze Assignment Load Portlets

Data from the Analyze Resource Pools or Analyze Assignment Load portlets can be exported to Microsoft Excel. The effort decompression service on the PPM Server, which takes a snapshot of the resource capacity, resource pool capacity, and workload data, must be enabled before you can export the data. By default, the effort decompression service is enabled.

Typically, you can view this data in the Analyze Resource Pools and its Breakdown (data) table or the Analyze Assignment Load and its Resource Breakdown table. However, if thresholds are exceeded for these portlets (see Thresholds for Analyze Resource Pools and Analyze Assignment Load Portlets for more details), these portlets do not display. Use the data export to view the data in Microsoft Excel.

To configure the effort decompression service on the PPM Server, modify the following parameters in the `server.conf` file. See the *System Administration and Reference* for more information.

Parameter	Description
ENABLE_EFFORT_DECOMPRESSION_SERVICE	Enable or disable the effort decompression service. Set this parameter to true to enable the effort decompression service. When the service is enabled, a snapshot is taken of the resource capacity, resource pool capacity, and workload data at the interval specified by EFFORT_DECOMPRESSION_INTERVAL. Valid values: true, false Default: true
EFFORT_DECOMPRESSION_INTERVAL	How often, in minutes, a snapshot is taken of the resource capacity, resource pool capacity, and workload data. Default: 1440 (24 hours)

To export Analyze Resource Pool portlet data to Microsoft Excel, do the following:

1 Select **Resource Management > Data Exports > Analyze Resource Pool.**

2 Set the filter criteria for export. See the *Resource Management User's Guide* for more information.

An additional field is included for the filter criteria: Include Detailed Data. Select this checkbox if you want to get a breakdown of total resource capacity viewed against load by staffing profile (data displayed in the Analyze Resource Pool Breakdown table).

3 Click **Export To Excel.**

To export Analyze Resource Pool portlet data to Microsoft Excel, do the following:

1 Select **Resource Management > Data Exports > Analyze Assignment Load.**

2 Set the filter criteria for export. See the *Resource Management User's Guide* for more information.

An additional field is included for the filter criteria: Include Detailed Data. Select this checkbox if you want to get a breakdown of total resource capacity and workload (data displayed in the Analyze Assignment Load Resource Breakdown table).

3 Click **Export To Excel.**

The date when the snapshot was taken is included in the export. If the effort decompression service is disabled, either the data is displayed from the last snapshot or no data is displayed (if no snapshots have been taken).

Integrations

This section includes information about integrations in Service Pack 9.

Integration with HP Universal CMDB

You can integrate PPM Center version 7.1 with HP Universal Configuration Management Database (HP Universal CMDB) version 7.50. HP Universal CMDB consists of a business-service-oriented data model with built-in discovery of configuration items (CIs) and their dependencies, visualization and mapping of business services, and tracking of configuration changes.

When you integrate PPM Center with Universal CMDB, you can select CIs and perform impact analysis from change requests in PPM Center, to determine which components of a system will be affected by a software change, and to what extent. The integration assists IT managers and Change Advisory Boards in deciding whether a change request should be approved for development or deployment.

The Configuration Management Database (CMDB) in Universal CMDB contains information about all your CIs (servers, applications, hosts, and so on) and their relationships. CIs can vary widely in complexity, size, and type, from an entire system (including all hardware, software, and documentation) to a single module or minor hardware component. For example, the CMDB contains information about which CIs are affected when other CIs stop functioning or have operational problems.

As an example of the value of impact analysis, consider a proposed software change that involves upgrading a database server. You would need to stop the server, and in some cases this could prevent users from accessing crucial services, or even cause a crash of your production system. Impact analysis determines the effect on the entire system of stopping the server, and gives you a report showing the components that will be impacted. This enables you to plan the change with minimal disturbance to your operations.

You generally perform impact analysis as follows:

- Select the CIs that you suspect might be affected by the planned software change.

  NOTE: HP recommends using CI names in Universal CMDB that will be meaningful to you in PPM Center.

- Run impact analysis on the selected CIs. Impact analysis analyzes the relationships among the selected CIs in the CMDB, and generates a report showing the CIs that will be affected by the planned change.

- Run impact analysis at additional points, such as:

  — Before approving or developing a change, to forecast the effect that the change will have on your system.

  — After the change has been created and is ready for deployment, which could take a long time, in case your system infrastructure has changed since the previous impact analysis was performed.

NOTE: No additional software needs to be installed on the Universal CMDB server to integrate PPM Center and Universal CMDB.

NOTE: Integrations of PPM Center with both Mercury Application Mapping and Universal CMDB can coexist without interfering with each other. Data obtained from the integration with Mercury Application Mapping is not migrated or converted for use by the integration with Universal CMDB.

HP Universal CMDB Documentation

The following HP Universal CMDB documents for version 7.50 are not directly related to PPM Center or integration with it, but they may be useful to you:

- *HP Universal CMDB Deployment Guide*

- *HP Universal CMDB Database Guide*

- *HP Universal CMDB Discovery and Dependency Mapping*

- *HP Universal CMDB Model Management*

- *HP Universal CMDB CI Attribute Customization*

- *HP Universal CMDB Glossary*

- *HP Universal CMDB 7.50 Readme*

Configuring Universal CMDB for the Integration

To configure Universal CMDB for the integration, configure views in Universal CMDB and create a PPM Center user and password in Universal CMDB. See the Universal CMDB documentation listed above as necessary.

Configuring PPM Center for the Integration

After the service pack is installed, perform the following procedures to configure PPM Center for integration with HP Universal CMDB:

1 Stop the PPM Server.

2 Run the script:

```
sh ./kConfig.sh
```

Add the parameters and values in the following table to the `server.conf` configuration file. (All parameter names begin with `com.kintana.core.server` but that is not shown in the table.)

Parameter	Value
UCMDB_SERVER_URL	The URL of the Universal CMDB server: `http://<UCMDB_host>:<port>/ucmdb/` where `<UCMDB_host>` represents the host machine on which Universal CMDB is running.
UCMDB_GATEWAY_URL	The URL of the Probe Gateway component of the Discovery and Dependency Mapping (DDM) Probe. The Probe Gateway provides communication (HTTP or HTTPS) between the Probe Manager and the HP Universal CMDB server for processes such as downloading tasks and returning task results. Set the value to: `http://<UCMDB_host>:<port>/mam/gateway?` where the value for `<UCMDB_host>:<port>` is usually the same as for the UCMDB_SERVER_URL parameter.
UCMDB_USER	The Universal CMDB user for the integration, for example, admin.
UCMDB_PASSWORD	The password for the Universal CMDB user. The password must be encrypted as described in step 4.
UCMDB_SERVER_VERSION	Specify `7.5` or `7.50` as the version of Universal CMDB software being used on the Universal CMDB server.
UCMDB_MAX_CI_NUMBER	The maximum number of CIs a request is allowed to have. Valid values are from 1 to 100. If a value greater than 100 is specified, the PPM Server will not restart and displays an error message. The default is 20.

3 Restart the PPM Server.

4 Encrypt the password you plan to use for the `UCMDB_PASSWORD` parameter:

a Navigate to the `<PPM_Home>/bin/ucmdb` directory.

b Run the `kEncryptUcmdbPassword.sh` utility.

c Specify the password you want to encrypt.

The utility encrypts the password and displays the encrypted text.

d Copy the text in the `Encrypted text` section on the screen and paste it as the value for `UCMDB_PASSWORD` in the `server.conf` file, making sure that you do not copy any carriage returns into the file.
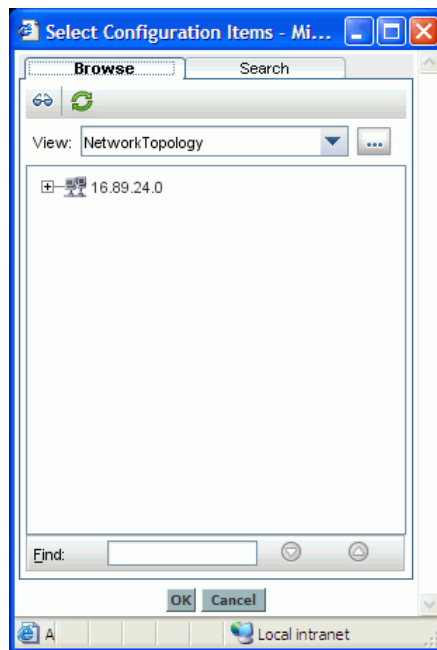
5 Configure a request type with the Universal CMDB Impact Analysis field group:

   a   Log on to PPM Center.

   b   From the menu bar, select **Administration > Open Workbench.**

       The PPM Workbench opens.

   c   From the shortcut bar, select **Demand Mgmt > Request Types.**

       The Request Types Workbench opens.

   d   Select the request type to which you will add the Universal CMDB Impact Analysis field group.

       NOTE: If PPM Center has been integrated with Mercury Application Mapping, you can optionally select a request type that includes the MAM Impact Analysis field group. Integrations of PPM Center with both Mercury Application Mapping and Universal CMDB can coexist without interfering with each other.

   e   Open the request type and its request header type.

   f   Click **Field Groups.**

   g   In the Field Groups window, scroll down and select the checkbox to enable the Universal CMDB Impact Analysis field group.

       NOTE: This field group is different from the CMDB Application field group near the top of the Field Groups window.

   h   Click **OK** to add the Universal CMDB Impact Analysis field group to the request header type.

   i   Expand **Universal CMDB Impact Analysis** in the **Prompt** column on the **Fields** tab in the request header type.

   j   Select the **CI List** field, and click **Edit.**

   k   On the **Attributes** tab, select **No** for the **Display Only** option and select **Yes** for the **Display** option.

   l   Select the **Security** tab and edit field-level security for the **CI List** field as needed.

   m   Click **OK** to save and close the Edit window and click **OK** to save and close the Request Header Type window.

   n   Return to the request type, which now has the Universal CMDB Impact Analysis section and its **CI List** field, based on the changes you made to the request header type.

   o   Use the **Layout** tab to reposition the **Universal CMDB Impact Analysis** section on the request type, as desired.

       NOTE: On the **Status Dependencies** tab for the **CI List** field, leave the **Required, Reconfirm,** and **Clear** options set to **No.** You can change the **Visible** and **Editable** options as desired.

Using the Integration

To select the desired configuration items (CIs) in Universal CMDB to add to the request:

1 Log on to PPM Center.

2 From the menu bar in the standard interface, select **Demand Management > Create a Request.**

3 Create a request using the request type that you modified to include the Universal CMDB Impact Analysis field group.

4 In the **Universal CMDB Impact Analysis** section of the new request, click **Select Configuration Items.**

   The CI selector applet from Universal CMDB launches, with **Browse** and **Search** tabs.

5   Use the tabs to select the desired CIs for the request.

—   To use the **Browse** tab, select a view such as **Network Topology** from the **View** list.

Expand the view as desired. You can select multiple items in the tree by using `Ctrl` + **click** or `Shift` + **click.**

—   To use the **Search** tab, complete the **Search for** field to limit search results, and select a **CI Type.**

6   Click **OK** to add the selected CIs to the request, under the **Impacted Configuration Items** heading in the **Universal CMDB Impact Analysis** section. The added CIs are shaded in color. Duplicate CIs are not added. CIs selected using the **Search** tab in the Universal CMDB applet do not show data for the **View Name, View Type, View Tree Name,** and **View TQL Name** columns, because the same CI can exist in multiple views.

If adding the CIs to the request would exceed the maximum number allowed by the `UCMDB_MAX_CI_NUMBER` parameter in the `server.conf` file, none of the selected CIs are added.

When you select and add CIs in Universal CMDB to the PPM Center request, the CIs are never changed or deleted in Universal CMDB.

Create New Request For Change

Expand All **Collapse All**   [Submit]   [Cancel]

⊟ Header

⊟ Summary

Created By:	Admin User				
Department:	[▾]	Sub-Type:	[ ] 📋		
*Workflow:	Bug Request Type Workflow 📋		Request Status:	Not Submitted	
Priority:	[▾]	Application:	[ ] 📋	Contact Name:	[ ] 📋
Assigned To:	[ ] 👤 🔍	Assigned Group:	[ ] 📋	Contact Phone:	
Request Group:	[ ] 📋			Contact Email:	
Description:	[ ]				

⊟ Universal CMDB Impact Analysis

[Select Configuration Items]

Impacted Configuration Items

	CI Name	CI ID	View Name	View Type	View Tree Name	View TQL Name
❌	16.89.24.0	072f25d084a92642f9faa507bffa1175	NetworkTopology	pattern	NetworkTopology	NetworkTopology
❌	vmcuppac11.devlab.ad	dd8aac03a641ae1dab16114c0a65941e	NetworkTopology	pattern	NetworkTopology	NetworkTopology
❌	16.89.27.39	5bde5b91cbed86c4ed42be29d85bfc15	NetworkTopology	pattern	NetworkTopology	NetworkTopology

3 configuration item(s) added.

[Launch HP Universal CMDB Impact Analysis]   [Launch HP Release Control]

⊞ Quality Center Info

⊞ Work Item Fields

⊞ Details

⊞ Notes

⊟ References

Reference Additions

New Reference: [Attachment ▾]   [Add]

References to be added on Save:

[   ]

[Open]   [Remove]

[Submit]   [Cancel]

7   As necessary, click the **Delete** icon to the left of any CI you want to delete.

The **Delete** icon becomes an undo icon to allow you to undo the pending deletion.

8   After the desired CIs are listed in the request, click **Submit** (or **Save** for an existing request) to add the list of CIs to the request.

To generate an Impact Analysis Report for the CIs that have been added to a request:

1   Click the Launch HP Universal CMDB Impact Analysis button in the Universal CMDB Impact Analysis section of the request.

An Impact Analysis Report is generated in Universal CMDB.

2   Save the report in the desired format (for example, PDF or XML) at the desired file location.

3   If desired, add the report to the request as a reference. To do so, in the **Reference Additions** section of the request, select the **Attachment** option in the **New Reference** field, click **Add,** and complete the Add Document dialog.

NOTES:

- The **Launch HP Change Control Management** button appears in the request if PPM Center is also integrated with HP Change Control Management. For more information, see the *Mercury IT Governance Center–Change Control Management Integration Guide, Version 2.0.*

- If a request with a list of CIs is copied, the list of CIs is not copied to the new request.

- The CIs in a request are available as part of standard Web services for a request. The token is REQ.VP.KNTA_UCMDB_CI_LIST. The value of the field represented by this token is a comma-separated list of CI IDs.

- The following tables have been added to the PPM Center database to support the integration with Universal CMDB:

  — KCRT_FG_UCMDB

  — KNTA_UCMDB_CI_SETS

  — KNTA_UCMDB_CI_ENTRIES

Certifications

Support for the Java 1.4 software provided by Sun ended as of October 30, 2008 (see **http://java.sun.com/products/archive/eol.policy.html** for details).

Consequently, as of Service Pack 9, Java 1.4 is no longer supported and use of Java 5 is required for use on all PPM Server platforms (as well as PPM Center clients accessing the PPM Workbench). An additional side-effect of this change is that some of the earlier patch levels of IBM AIX are no longer supported. This change further results in no longer supporting the Document Management DFC software version 5.3 SP2 on IBM AIX platforms.

Use of the following Java 5 software is now required on the PPM Server:

- For HP platforms: HP-UX Java Development Kit (JDK) for the Java 2 Platform Standard Edition (J2SE) version 5.0.07 (available from HP)

- For IBM platforms: Java 2 Runtime Environment, Standard Edition (build pap32dev-20080716a (SR8)) IBM J9 VM (build 2.3, J2RE 1.5.0 IBM J9 2.3 AIX ppc-32 j9vmap3223-20080716 (JIT enabled) (available from IBM)

- For Microsoft, Sun, Red Hat and SUSE platforms: Java 2 Platform, Standard Edition 5.0 (J2SE 5.0) JDK 1.5.0_11 (available from Sun)

PPM Center client systems may continue to use version 5.0 update 2 (or later) of the Java plug-in; however, use of version 1.4.2_06 should be discontinued.

Fixes

The following items (identified by a tracking number) were fixed in Service Pack 9:

1600699632: Project Management

PROBLEM: When a project is created from a proposal and the name of the financial benefit is greater than 100 characters, a database error is displayed instead of a PPM Center error that explains the problem. (201368)

1600336787: Demand Management

PROBLEM: In the printable version of a request, dates for references were not formatted correctly. (201057)

1600700084: Project Management

PROBLEM: The work item description in a time sheet is truncated to 17 characters. The full description is now displayed in a tooltip. (202596)

1600875665: Integrations

PROBLEM: When integrating Microsoft Project and PPM Center, if a task is cancelled, PPM Center adds `Cancelled` to the task name each time the project is exported from Microsoft Project to PPM Center. (201541)

1601306863: Time Management

PROBLEM: The PMTMSync tool, used to synchronize actual efforts between Project Management and Time Management, does not correctly calculate the estimated remaining effort and percent complete. (201940)

2215743764: Demand Management

PROBLEM: The Demand Scheduling field group cannot be added to a project. (198726)

3601354434: Platform

PROBLEM: Certain SMTP servers (sendmail in particular) strip dots (.) at the beginning of the line in a message body. This could lead to formatting loss in HTML emails. (201545)

3601881394: Deployment Management

PROBLEM: File transfers over Secure Copy Protocol (SCP) occasionally hung because the target host was not ready for the transfer. (202368)

3602461956: Demand Management

PROBLEM: When configuring notifications, setting the interval to `Immediate` and enabling the `Reminder` option disables the `Do not send if obsolete` option. (202046)

3602982200, 1-645544323: Platform

PROBLEM: When editing the preferences for a Request Summary portlet, if you filtered for many request types, a warning box appeared with the following text: "You have exceeded the maximum length of this multi-select Auto-Complete field." Now, the field size limitation has been removed. (202414, 195053)

102345: Platform

PROBLEM: After changing the cost rate rule for a resource, the actual cost for effort on the resource's time sheet was reset to 0. (202683)

NA: Platform

PROBLEM: If an activity was first saved as a capitalized cost and then changed to an operational cost, the actual cost was calculated as doubled in the Actual Time Summary report. (202698)

NA: Time Management

PROBLEM: After creating a time sheet and using the vertical and horizontal scroll bars to move the view of the page, the Daily Totals line was no longer visible. (202328)

NA: Time Management

PROBLEM: If there is more than one activity on a timesheet line logging time against a task, the actual effort entered differs from the actual effort displayed in the Compare to Workplan view. (201650)

NA: Time Management

PROBLEM: The `timeConversion.xsd` file was missing. (202107)

NA: Time Management

PROBLEM: Fields on the Create Work Allocations page were cleared when a new work item was selected. (202544)

1601228866, 1-702869853: Project Management

PROBLEM: If a Proposal request type has a table component field with rules and the Project request type has the same table component (with the same token name), the Create Project workflow step may fail. (201860, 202138)

3600520673: Platform

PROBLEM: The user cannot open a report type in the Workbench if the report type has too many configured security groups (for example, more than 6,000). (201844)

3601651837: Project Management

PROBLEM: Microsoft Project does not open a file until the Plug-in for PPM is disabled. After disabling the Plug-in for PPM, the user must either re-enable the Plug-in for PPM or uninstall and re-install the Plug-in for PPM. (202117)

3602110303, 3600315141: Demand Management

PROBLEM: When a user tries to move a request forward in a workflow, the following error appears: `One or more references in this Request is being updated by another database session. Please try again later. (KCRT-40186)` (201637, 202439)

NA: Installer

PROBLEM: `kSupport.sh` is in DOS format and does not run on some platforms. (202181)

3602912380: Demand Management

PROBLEM: Request type or request header type cannot be saved. (202267)

1218443632: Costing

PROBLEM: When exporting budget and list portlets to Excel, if the BUDGETS_IN_WHOLE_DOLLARS `server.conf` parameter is set, numbers exported to Excel are not in this format. (201652)

3601384326: Demand Management

PROBLEM: Selecting **Enter** in the Date Time Chooser dialog results in an error. (201867)

1600841525: Integrations

PROBLEM: The user cannot open a PPM Center project in Microsoft Project. (202043)

3601635873: Integrations

PROBLEM: Synchronization between PPM Center and Microsoft Project takes a long time. (202118)

3602857570: Demand Management

PROBLEM: Cannot select a workflow button with a long name. (202140)

1600336979: Demand Management

PROBLEM: Net present value (NPV) displays more than two numbers to the right of the decimal point. (202710)

3603111667: Dashboard

PROBLEM: Cannot view Request List portlet. (202820)

NA: Dashboard

PROBLEM: The default Dashboard page displayed at login is the second page listed in the private pages. (202683)

3601115491: Time Management

PROBLEM: Inconsistent behavior of a resource role taking precedence over a task role for time sheet reports, task cost, and roll-up of costs to a budget. (200888, 202448)

3602768612: Project Management

PROBLEM: In the Resource Assignment portlet, when selecting any user from the portlet preferences, an error occurs. (202507)

1600587672: Project Management

PROBLEM: From a project in the resources tab, when time over 1,000 is entered into a time sheet of an existing resource and the delimiter used for numbers is a space, when adding an additional resource, the overall actual effort displays `NaN`. When saving the project, an error occurs. (201681)

NA: Platform

PROBLEM: The HP Demand Management Web service special command `ksc_export_request` does not export notes content. (202317)

1601914343, 1600747766: Time Management

PROBLEM: Actuals for projects and tasks were not synchronized between HP Time Management and HP Project Management. (202374, 202121)

3602370601: Resource Management

PROBLEM: When modifying a resource, if a change is made in the Role/Skill tab but the modification is saved from another tabbed area except the Calendar tab, the KNTA_PENDING_ROLLUPS table is not updated. (202812)

1-739429483: Platform

PROBLEM: After upgrading to version 7.1 Service Pack 3, Workbench performance is slow. (198868)

3600046101: Project Management

PROBLEM: A project or high-level task is shown as 100% complete even if a subtask is not completed. Projects or high-level tasks that are 99.5% complete or higher are rounded up to 100%. (199319)

3601850804: Demand Management

PROBLEM: Pre-configured system validations (RSC – Roles – Existing, PM – Project Types (restricted), and PPM – User Id – Enabled or Existed) do not migrate correctly. (201444)

3601384124, 3602062617, 3601320368: Project Management

PROBLEM: Cost rules for organization units are not being used in project cost calculations. (201828)

3602776289: Demand Management

PROBLEM: A project cannot be created from a proposal. (202370)

2602091034: Platform

PROBLEM: Updating the regional calendar from the Dashboard does not update the calendar in the KNTA_SERVER_PARAMETERS table. (202419)

3602884565: Dashboard

PROBLEM: If flexible fiscal periods are used and the start date for two periods is in the same month, some portlets, such as the Analyze Resource Pool portlet, display the months incorrectly. (202459)

NA: Demand Management

PROBLEM: In the Workbench, some disabled keys can be operated using the keyboard. (203041)

3602085411: Costing

PROBLEM: The calendar cannot be modified to display fiscal years and periods. (201638)

3603261982: Dashboard

PROBLEM: If Display on Search and Filter is disabled for a field, the field does not appear in the search results. (202821)

3601412847: Time Management

PROBLEM: "Please fix the following problems: is required." error message is too vague. (201544)

3600520673: Platform

PROBLEM: A report type cannot be copied if it contains too many restricted security groups. (201845)

1601993534: Demand Management

PROBLEM: Requests cannot be searched if the Request No field was renamed in the request header type. (202418)

2602252451: Demand Management

PROBLEM: Performance is slow for the Request List portlet and when searching requests. (202603)

2601808497: Resource Management

PROBLEM: Assignments cannot be made to a new staffing profile if the end period is after the year 2015. (202604)

3601573035: Integrations

PROBLEM: If you removed a resource from a task in a Microsoft Project work plan, and the resource had some actual effort entered for the task in PPM Center, sending an update of the work plan to PPM Center caused the actuals to be removed from PPM Center. If you select Refresh Association to undo the deletion, only the tasks, but not the resource, are recovered. (202749)

CCM 3306: Platform

PROBLEM: Performance degrades when integrating Change Control Management with Mercury IT Governance Center Web Services version 6.0. (201905)

NA: Time Management

PROBLEM: An empty request description appears as `null` in the time sheet line when the request is added to a time sheet. (203108)

NA: Time Management

PROBLEM: The auto-complete feature of the **Project** field in the Add Projects/Tasks to Time Sheet window does not work. (203109, 203144)

2603603674: Platform

PROBLEM: Currency fields or fields that use currency as a validation do not validate with spaces in its value. (203112)

2603416622: Dashboard

PROBLEM: Preconfigured Dashboard pages cannot be added to the Dashboard if the Internet Explorer 6.0 Service Pack 2 browser is used. (202871)

NA: Time Management

PROBLEM: The auto-complete window of the **Project** field in the Add Projects/Tasks to Time Sheet window contains headers labeled **Empty.** (203145)

3600307379: Resource Management

PROBLEM: The Resource Request portlet does not display the expected information for unmet hours (the portlet displays total unmet hours from the start date to the end date, not for the date range selected in the preferences). Three new columns of information have been added to the portlet: Unmet Range Start, Unmet Range End, and Unmet Range Hours.(199110)

NA: Time Management

PROBLEM: A time sheet cannot be saved if an item has been deleted then re-added. (203153)

NA: Time Management

PROBLEM: The Approve Time search results page does not appear after clicking **Done** or **Cancel** from a selected time sheet if you clicked **Next** from the search results page to find the selected time sheet. (203096)

Known Limitations in Service Pack 9

NA: Installer

PROBLEM: After installing Service Pack 9, the PPM Center Windows service may not start or PPM Center does not start. (203047)

SOLUTION: Reinstall the PPM Center Windows service:

1 Verify that the `JAVA_HOME` environment variable is set to JDK 1.5.

2 Run the following scripts from the `<PPM_HOME>`/bin directory:

```
ksvc remove-all
ksvc install-all
```

2601808497: Resource Management

PROBLEM: Assignments cannot be made to an existing staffing profile if the end period is after the year 2015. (202604)

SOLUTION: Contact your HP support representative to extend the `periods.xml` file.

NA: Integrations

PROBLEM: After integrating Universal CMDB with PPM Center and encrypting the password for the Universal CMDB user, CIs cannot be selected to be added to a request. (203187)

NA: Platform

PROBLEM: Korean characters do not display correctly in graphs. (179900)

SOLUTION: Fonts need to be configured for Java on both the PPM Server and client. Refer to **http://java.sun.com/j2se/1.5.0/docs/guide/intl/font.html** and **http://java.sun.com/j2se/1.5.0/docs/guide/intl/fontconfig.html** for more information.

1-665545897: Demand Management

LIMITATION: If a term in the Query Builder uses an auto-complete field (that is, the field's data is dynamically populated), you cannot add additional terms to the query. (195666)

LIMITATION: The PPM Center entity migrator cannot be used to migrate instances running PPM Center version 7.1 Service Pack 4 (or earlier) to instances running PPM Center version 7.1 Service Pack 5 (or later). An additional flag was added to Service Pack 5 (and later Service Packs). When the migrator from Service Pack 5 (or later) does not detect the correct number of flags, it fails. (202039)

Installation Notes for Service Pack 8

Service Pack 8 requires a patch that corrects time sheet actual cost data. If you have already installed Service Pack 8, refer to the steps in If You Have Already Installed Service Pack 8. If you have not yet installed Service Pack 8, refer to the next section.

NOTE: If you intend to use the HP Document Management module, you should install Documentum Foundation Classes 5.3 prior to installing SP8. See the *HP Document Management Guide and Reference* at the HP Software Product Manuals site for installation instructions.

If you are installing a Language Pack, see the Readme file that accompanied your Language Pack software.

If You Have NOT Installed Service Pack 8

If you have not yet installed Service Pack 8, HP recommends that you install Service Pack 9 instead. If you install Service Pack 8, you must also install a patch. If there are fixes or enhancements in Service Pack 8 that you need, complete the following steps to install the Service Pack and patch.

1 Back up your database.

2 Stop the PPM Server. The Service Pack cannot be installed on an active server.

3 Copy the Service Pack file `mitg-710-SP8.jar` to the `<PPM_Home>` directory. This is the directory where the PPM server is installed.

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

5 Start the installation using the following command: `sh ./kDeploy.sh -i SP8`

6 Follow the on-screen instructions to complete the Service Pack installation.

7 Compile the new JSP files using the following command: `sh ./kJSPCompiler.sh`

8 Unzip the patch file `fix_costing` from `PPM_71_SP8_Mandatory_Hotfixes.zip` into the `<PPM_Home>`/`server`/`<PPM_Server_Name>` directory.

9 Start the PPM Server.

If You Have Already Installed Service Pack 8

Complete the following steps if you have already installed Service Pack 8.

1 Run the following script against the PPMC database schema to locate incorrect data: `CheckCorruptedData.sql`

   Look for the following:

- Missing actual cost data when actual effort data exists

- Actual cost data that is doubled

   If you cannot locate any incorrect data, go to step 3.

2 Correct the data by doing the following:

   a Back up the file `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/WEB-INF/struts-config-tm.xml`.

   b Modify file `<PPM_Home>/server/<PPM_Server_Name>/deploy/itg.war/WEB-INF/struts-config-tm.xml`. Near the end of the file, add the following as the last entry of action-mapping (add the following before `</action-mapping>`):

   ```
   <action path="/BatchSaveTimeSheet"
     type="com.mercury.itg.tm.web.BatchSaveTimeSheetAction"
     name="editTimeSheetForm" scope="request" validate="false">
     <forward name="success" path="/OpenTimeSheet.do?timesheetId=" redirect="true" />
     <forward name="Done" path="/core/Redirect.do" redirect="true" module="" />
   </action>
   ```

   c Disable cost roll-up calculations. Set the ENABLE_COST_ROLLUP_SERVICE `server.conf` parameter to FALSE. Refer to *System Administration Guide and Reference* for more information about editing `server.conf`.

   d Unzip the patch file `recalculate_timesheets` from `PPM_71_SP8_Mandatory_Hotfixes.zip` into the `<PPM_Home>/server/<PPM_Server_Name>` directory.

   e Recalculate costs and save all time sheets by opening the following page in a browser:

   `http://<host>:<port>/itg/web/knta/admin/BatchSaveTimeSheets.jsp`

   NOTE: This utility takes some time to complete.

   f Remove the `recalculate_timesheets` patch file.

   g Enable cost roll-up calculations. Set the ENABLE_COST_ROLLUP_SERVICE `server.conf` parameter to TRUE. Do not restart the PPM Server just yet. Complete step 4 before starting the PPM Server.

3 Stop the PPM Server.

4 Unzip the patch file `fix_costing` from `PPM_71_SP8_Mandatory_Hotfixes.zip` into the `<PPM_Home>/server/<PPM_Server_Name>` directory.

5 Start the PPM Server.

Enhancements and Fixes in Service Pack 8

The following changes were made in Service Pack 8.

Enhancements

- Logging has been enabled for the PPM Center Microsoft Project Plug-in.

- A time sheet data import tool has been added. The tool enables you to import time sheets from external systems into PPM Center. The time sheets must be converted to XML format.

  Some of the features of the time sheet data importer include:

  — You can upload a large volume of time sheet data at one time.

  — The tool uses multi-threading to support the parallel processing of time sheets.

  — Time sheet data is validated for integrity.

  — The tool checks for time sheet policy violations.

  — The tool supports logging time against Projects, Tasks, Requests, Packages, and Miscellaneous work items. It also supports specifying activities, charge codes, and user data, but does not support creating them. The tool does not support work allocations processing and delegations.

  To use the time sheet data import tool:

1 Convert your time sheet data to XML format. The XSD file to help you understand the format to which your XML files must conform is:

   ```
   http://<PPM_Server_Name>:<port>/itg/web/knta/global/webservices/xsd/timeConversi
   on.xsd
   ```

   where:

   — *<PPM_Server_Name>* is the host name or IP address of your PPM Center instance;

   — *<port>* is the port number from which your PPM Center instance is accessed.

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

3 Run the following command: sh ./kTMDataConversion.sh

   The following arguments can be used:

   ```
   -user (user name) – Required
   -pwd (password) – Required
   -xmlLocation (directory or single file name) – Required
   -logLocation (defaults to the xml directory)
   -maxThreadcount (10 by default; the number of threads that can be used depends on the type of  hardware)
   -checkPolicyAndDefaultCC     (false by default) - Checks policy for time sheets and default charge codes, if any
   -errorsPerMinuteForCancel (50 by  default) – Number of errors count per minute to cause auto graceful exit
   -testMode (false by default) – Runs without commit
   ```

   IMPORTANT: Be sure to use a TEST instance before deploying the tool in a production environment. Use a minimum of 20% to 30% of the real data to capture potential functional, performance, and setup issues.

Certifications

- Microsoft Vista client operating system
- Oracle 10.2.0.4 support for the PPM Center database

See the System Requirements and Compatibility Matrix for additional information.

Fixes

The following items (identified by a tracking number) were fixed in Service Pack 8:

102345: Costing

PROBLEM: Calculated actual costs are reset to zero in time sheets for resources whose cost rate rules are changed. (202683)

NA: Costing

PROBLEM: When an activity is changed from capitalized to not capitalized, actual costs in its time sheet are doubled. (202698)

3601927700: TIME MANAGEMENT

PROBLEM: Prior to Service Pack 5, a vertical bar appeared in the time sheet entry page that enabled users to scroll up and down and still see the date header. The vertical bar has been restored in Service Pack 8, making it easier to enter time sheet information. (201601)

NA: DEMAND MANAGEMENT

PROBLEM: A batch update of requests was not possible if the requests had required fields in execution steps. (201488)

36124516: PLATFORM

PROBLEM: When importing users either through the Import Users report or by using LDAP, orphan rows were created in the KDRV_CALENDARS table. (201314)

NA: PROJECT MANAGEMENT

PROBLEM: A Java error appeared when attempting to add a user as a stakeholder a second time. (199349)

1217928153: PROJECT MANAGEMENT

PROBLEM: If you opened the Project Overview page from the References section of a request, and you clicked Done after adding a task, the Project Overview page closed. (198514)

NA: PROJECT MANAGEMENT

PROBLEM: An error message appeared if you added tasks and clicked Done on the Add Task Page, and then you clicked Done on the View Work Plan page. (201807)

3600045484: PROJECT MANAGEMENT

PROBLEM: The use of "!" in the Description field of a request type has been modified. Now, if you add "!" but no prompt in the Description of a banner field, these fields without a prompt won't be displayed on Search pages but are displayed on the Create and Details page of a request. (200121)

3601167366: DEMAND MANAGEMENT

PROBLEM: Text for portlet column headers did not wrap, which mean a user had to scroll a page to see the full text of the column header. Other portlets on the page adopted the same size as that of the widest portlet, which led to too much whitespace appearing on a page. Now, the text for column headers wrap for all languages except Korean. (200422)

1600836580: PROJECT MANAGEMENT

PROBLEM: Users who were no longer participants in a project but who were resources in the baseline of the work plan could access the project. Now, any user who is no longer a participant in a project cannot access the project. (201376)

NA: SINGLE SIGN-ON

PROBLEM: When PPM Center was integrated with Siteminder single sign-on, authentication using Web services did not work. A new server.conf parameter has been added: `ENABLE_WEBSERVICE_SSO=false` (false is the default value) (200990).

2600200307: PLATFORM

PROBLEM: The Import Users report did not update the calendar when a resource's region was updated. (201311)

3601278297: PLATFORM

PROBLEM: After upgrading to Service Pack 5, when clicking a log hyperlink in the status section of a PFM-Proposal request, a Java error appeared. (201233)

2216852646: PROJECT MANAGEMENT

PROBLEM: The Reference section was missing when an Issue, Risk, or Scope Change request was created from the Project Overview page. (200168)

3600981379: DEMAND MANAGEMENT

PROBLEM: The Net Present Value and Return On Investment values were not formatted properly in the Notes section of requests if the Currency validation was used. (200162)

3602188405: PROJECT MANAGEMENT

PROBLEM: For custom PFM-PROJECT request types, if the KNTA_PLAN_START_DATE display mode was set to No, an error appeared when attempting to create a project. (201644)

2215742886: TIME MANAGEMENT

PROBLEM: An error appeared when request and package work item types were disabled and the Create Work Allocations page opens up with the Project/Task work item type by default. (201083)

2216846736: DEPLOYMENT MANAGEMENT

PROBLEM: An error appeared when clicking the Line Execution Log History URL for a package. (200242)

3600863580: PROJECT MANAGEMENT

PROBLEM: In certain cases, users were unable to open project (project attributes were missing from the database. (199932)

1600336044: RESOURCE MANAGEMENT

PROBLEM: In a Resource Pool, when clicking View Resource Load, the resources were not listed alphabetically. Now, resources are listed by Last Name, First Name. (200475)

1-644938533: PROJECT MANAGEMENT

PROBLEM: Security for project references was not controlled by access grants. (194892)

1-725764150: PORTFOLIO MANAGEMENT

PROBLEM: When creating a staffing profile from a proposal, there was no default value for Region. Now, when the Region field is hidden, when creating a budget or creating a staffing profile the default for the Region field is the system default region. You can make the field visible if the system default region is correct. (197456)

1600460338: REPORTS

PROBLEM: A report did not open if the set of security groups not allowed to execute the report was large. (201276)

1-708572389: RESOURCE MANAGEMENT

PROBLEM: The Expand All feature works slowly in the View Organization Model page when using Internet Explorer. A new server.conf parameter, RM_ENABLE_ORG_VIEW_EXPAND_ALL, has been added to address the problem. By default, the value for the parameter is set to false, and the Expand All and Collapse All buttons are not enabled. When the value of the parameter is set to true, both Expand All and Collapse All buttons appear on the View Organization Model page. (196922)

1-690954072: DEPLOYMENT MANAGEMENT

PROBLEM: An "internal error" message appeared when a package line entered a workflow step at the same time another package line departed the same step. Now, an error message dialog box appears, indicating that the package has been changed by another user and requesting that the user try (some action) again at a later time. (196122)

1600226119: PROJECT MANAGEMENT

PROBLEM: Field-level security for Task User Data did not work. (201571)

3600394935, 3600545252: PROJECT MANAGEMENT

PROBLEM: Better error messaging has been added for problems related to Microsoft Project integration and converting existing work plans to templates. (200164)

1600320936: PROJECT MANAGEMENT

PROBLEM: The View Projects access grant did not enable a user to view milestones or tasks. (201359)

1600736474: TIME MANAGEMENT

PROBLEM: The Percent Complete field was not highlighted (in red) if left with a zero value, when non-zero effort was logged. (201287)

NA: PLATFORM

PROBLEM: The special command ksc_run_plsql_procedure did not release a database connection after a timeout. (200037)

3601412847: TIME MANAGEMENT

PROBLEM: When a task on a time sheet was changed so that the Estimated Finish Date was the same as the Actual Start Date, an error message appeared indicating "Estimated Finish Date is less than Actual Start Date." (201135)

3601082248: TIME MANAGEMENT

PROBLEM: There were performance issues with some SQL queries. The SQL for calculating the actuals to date for a work item was tuned. (201615)

NA: RESOURCE MANAGEMENT

PROBLEM: An Out of Memory error appeared when attempting to use the View Resource Breakdown portlet in environments with a large number of resources. (201427)

3601031322: RESOURCE MANAGEMENT

PROBLEM: Better error handling in Hibernate cleanup code was added to make sure all sessions are closed and all contexts are cleaned up. (201527)

3600610280: PROJECT MANAGEMENT

PROBLEM: An Out of Memory error appeared in some environments when the Staffing Profile Period Sum Update service ran. (200690)

1600747766: TIME MANAGEMENT

PROBLEM: It was possible to create a time sheet (by copying an existing time sheet) in which the `TM_ACTUALS` database table included null currency and cost data. (201504)

3600001700: TIME MANAGEMENT

PROBLEM: Saving a time sheet with over 20 lines was slow. (201266)

3601643158: RESOURCE MANAGEMENT

PROBLEM: There were performance issues when moving between tabs on the Project Overview page. (201570)

3600670904: DEMAND MANAGEMENT

PROBLEM: When a program was deleted, the references in requests were not deleted successfully. (199639)

3601497607: PROJECT MANAGEMENT

PROBLEM: When configuring participants for a project type, if no security group was specified for "Only users in the groups listed below that have the Edit Project Types access grant," the project type had View Only access. (201264)

3601643122: RESOURCE MANAGEMENT

PROBLEM: Past time sheet data was considered when doing forecast calculation of resources. As a result, search for a resource using the Resource Finder took a long time. The calculation now ignores past time sheet data when doing the forecast calculation. (201614)

NA: TIME MANAGEMENT

PROBLEM: The Time Sheet Totals for Direct Reports portlet showed resources who had been disabled in the system. (201489)

NA: TIME MANAGEMENT

PROBLEM: There were performance issues when the batch size of time sheets was large for approving, freezing, or closing.

In SP8, the following server.conf parameters have been added to improve system performance related to time sheets. You can limit the maximum batch size for freezing and closing, and for approving time sheets. These parameters are especially useful if a single manager potentially can approve hundreds of time sheets.

The parameters are:

```
MAX_BATCH_TIMESHEET_FREEZE_CLOSE
MAX_BATCH_TIMESHEET_LINE_APPROVE
```

The suggested value for each parameter is 50.

If you don't use these parameters, the batch size is determined by the maximum search results for time sheets when approving, or freezing or closing; in the case of approving, the batch size is also determined by the maximum portlet results in the Time Sheet Approval portlet. (201418)

3601284725: PLATFORM

PROBLEM: It was not possible to bind RMI (used for the Workbench) to all network interfaces. In SP8, a new server.conf parameter has been added: `BIND_RMI_TO_ALL_IPS`. Setting the value to `true` enables the RMI socket to bind to all available network interfaces. Setting the value to `false` or omitting it enables the RMI socket to bind to only to the interface specified in the `RMI_URL`. (201286)

1-734830013: DEMAND MANAGEMENT

PROBLEM: User tokens did not affect security settings for attachments to a request. (197930)

3600610280: PLATFORM

PROBLEM: An Out of Memory error appeared in some environments when the Staffing Profile Period Sum Update service ran. (200691)

3600109344: TIME MANAGEMENT

PROBLEM: Under certain circumstances (many time sheets, many projects and tasks, certain database attributes), the My Work Items portlet timed out. (200432)

NA: PLATFORM

PROBLEM: Several changes were made to monitor the JBoss pool database connections:

The Broker performance report now shows the relevant matrix for JBoss connection pools in addition to the kintana pool.

The Broker in Use Session report now shows threads that are using connections from the JBoss connection pools.

202026: COSTING

PROBLEM: In some situations, running the Cost Rollup service resulted in a "No more data to read from socket" message. Performance improvements have been made to the queries used for the service. (202026)

3601163653, 3602485701, 3601393209: TIME MANAGEMENT

PROBLEM: Performance improvements have been made to the Actual Time Summary report. (201613, 202088)

2600670416: RESOURCE MANAGEMENT

PROBLEM: Saving an org unit with a large number of direct members caused the application to run out of memory when the application node was part of a cluster. (201829)

1600006999: DEMAND MANAGEMENT

PROBLEM: Clicking an action button quickly multiple times in succession potentially caused duplicate entries in the KCRT_TABLE_ENTRIES table. (201419)

3600833301: DEMAND MANAGEMENT

PROBLEM: The ksc_copy_request special command did not run the Apply On Creation rules. (201457)

3601699224: TIME MANAGEMENT

PROBLEM: The Work Items validation auto-complete list was not sorted. Now, the items are sorted by ID. (201391)

1600523599: PLATFORM

PROBLEM: In currency displays, the Euro sign was shown at the end of a number, not the beginning. (201100)

3601272418: INTEGRATIONS

PROBLEM: There were problems with percent complete calculation when the project or work plan was imported from Microsoft Project (MSP-controlled mode). (201123)

3601320368: TIME MANAGEMENT

PROBLEM: In some environments, running the Cost Rate Rule Update caused an Oracle error message to appear. (201776)

3601545061: DEMAND MANAGEMENT

PROBLEM: In the Validation report, if the Validation From and the Validation To fields are left blank, the report does not run. (201422)

1218582256: RESOURCE MANAGEMENT

PROBLEM: Because of problems with a validation, unsynched budgets do not appear in the Budget auto-complete list when creating a staffing profile. (199725)

123445343: DEMAND MANAGEMENT

PROBLEM: Currency field validations did not work correctly. Now, currency is shown correctly according to Microsoft Internet Explorer language settings. (199872)

1600336709: DEMAND MANAGEMENT

PROBLEM: There were problems when copying table components from parent to child requests. (201420)

3600164492: PLATFORM

PROBLEM: Users received a session timeout message prior to the time as set in the server.conf parameter for timeouts. The problem was resolved by requiring that the JBoss session timeout take its value from the `KINTANA_SESSION_TIMEOUT` parameter. (198928)

1600336986: RESOURCE MANAGEMENT

PROBLEM: Numbers in the Request Detail Report were not formatted correctly or right-aligned. (201325)

3601031322: TIME MANAGEMENT

PROBLEM: Changes were made to improve the performance of the Time Sheet Approval portlet. Beginning with SP8, the Time Sheet Approval portlet shows only time sheets that are eligible to approve. The portlet no longer shows time sheets with statuses of:

- Closed
- Frozen
- Cancelled
- Unsubmitted

(200712)

NA: PLATFORM

PROBLEM: Applying an earlier service pack may have resulted in the following error: "ORA-01422: exact fetch returns more than requested number of rows." (200530)

1-645544323: PLATFORM

PROBLEM: A stack trace error appeared when values selected from a multiselect auto-complete field added up to more than 4000 characters. (195053)

1600275037: PROJECT MANAGEMENT

PROBLEM: After a proposal converted to a project, users without access grants to the proposal could not view attached documents in the newly spawned project. (201297)

NA: TIME MANAGEMENT

PROBLEM: In a time sheet, if tasks are added that both track Estimated Remaining Effort (ERE) and that don't track ERE, then an error may appear when saving the time sheet, which states: "Actual Effort/(Actual Effort + Estimated Remaining Effort)*100 must be equal to PercentComplete (+-.5)." (201871)

3601526825: PROJECT MANAGEMENT

PROBLEM: The Export to Excel feature did not work if the "Automatic prompting for file downloads" option in Internet Explorer is turned off. (201352)

1218537936: DEMAND MANAGEMENT

PROBLEM: Performance improvements were made for creating requests, particularly for those requests in which the project reference field group is enabled. (201313)

3601245977: PROJECT MANAGEMENT

PROBLEM: Deleting tasks and sections from a work plan was slow. (201612)

1-725736913: RESOURCE MANAGEMENT

PROBLEM: Deleting work plans could take a long time. (199762)

3601046255: DEMAND MANAGEMENT

PROBLEM: There were currency display problems after installing Service Pack 5. (200413)

3601066194, 3600953947: RESOURCE MANAGEMENT

PROBLEM: After creating a staffing profile and viewing the resource pool breakdown, the breakdown included disabled resources with zero time assigned, and also included assignment line items for assets with no have time left. (200373)

1218443632: COSTING

PROBLEM: Exporting budgets resulted in extremely large files. (201295)

3601340431: DEPLOYMENT MANAGEMENT

PROBLEM: The Clear button for a package line that had executed cleared all the fields (editable and non-editable) in the Package Line detail tab. Beginning in SP8, the Clear button clears only editable fields. (200576)

1-724766953: TIME MANAGEMENT

PROBLEM: Time Sheets with no lines were not shown in the Delinquent Time Sheet report. (197208)

1-634752563: DASHBOARD

PROBLEM: In portlets with bubble charts, bubbles with extreme values may not have been completely shown and appeared cut off. (194244)

3600334357: DASHBOARD

PROBLEM: The right-most close icon (X) did not close the preference window in the Budget Summary portlet. (199056)

1600335898: TIME MANAGEMENT

PROBLEM: The Estimated Remaining Effort on a time sheet was calculated based on the value of the largest actual effort. (200598)

3600184507: COSTING

PROBLEM: Budget amounts appeared without commas. (198436)

3601696391: DEMAND MANAGEMENT

PROBLEM: Table components cannot be created by using the HP Demand Management Web services. (201827)

Known Limitation in Service Pack 8

PROBLEM: The Project Gantt View on the Project Summary Tab of the Project Overview Page does not load and shows an error if the project contains more than 15,000 lines. (202001)

Enhancements and Fixes in Service Pack 7

The following changes were made in Service Pack 7.

Enhancements

Program Management: A participant model of security has been added for program managers. Beginning with Service Pack 7, the Create Program and the Edit Program pages allow a user to add only those projects to a program in which the user is a participant. If a program manager is not a participant of a project, the program manager will not see those projects when creating or modifying a program (see the following paragraph for an exception). See the *Project Management User's Guide* for details about configuring participants.

If program managers are provided the View All Projects, they will be able to add projects to programs even for those projects for which they are not participants.

Earned value calculation can now be done in one of two ways: The current (pre-SP7) way is to obtain the total planned cost from the baseline, then multiply that by the percent complete. Beginning with SP7, if a task or project is less than 100%, the EV calculation is 0. The EV calculation is 100 only if the task or project is 100% complete. A `server.conf` parameter has been added to control EV calculation: EV_ALLOW_PRORATING. The new way of calculating EV is when the parameter is set to false. The default is true.

Certifications

Added 64-bit support for Linux platforms.

See the System Requirements and Compatibility Matrix for additional information.

The following items (identified by a tracking number) were fixed in Service Pack 7:

2215918027: RESOURCE MANAGEMENT

PROBLEM: When adding an unnamed headcount to a resource pool, an error message appeared indicating that the name already exists. (200257)

NA: PROJECT MANAGEMENT, SINGLE SIGN-ON

PROBLEM: When Siteminder is used for single sign-on, an error appears when attempting to access References for a project. (200327)

1-669436963: PROJECT MANAGEMENT

PROBLEM: In some environments, when editing actuals in a work plan, the actuals value was not saved until the user tabbed out of the field for entering the value. (199092)

NA: PROJECT MANAGEMENT

PROBLEM: When using the ksc_update_workplan_status special command, an error appeared if the ON_HOLD value was used. (200317)

1-708675983: PROJECT MANAGEMENT

PROBLEM: When searching projects, an error appeared if the user did not have the access grant to see projects which were restricted for viewing by participants only. (199643)

NA: RESOURCE MANAGEMENT

PROBLEM: When a change was made to a staffing profile to reduce demand for a resource, the Resource Assignment page did not show an overallocation. (200322)

3600045484: PROJECT MANAGEMENT

PROBLEM: When values were added to fields on the Project Details tab, the fields became improperly aligned. (200915)

NA: TIME MANAGEMENT

PROBLEM: When selecting tasks to add to a time sheet, the tasks did not sort according to task ID in the work plan. (200326)

NA: RESOURCE MANAGEMENT

PROBLEM: The Individual Resource Capacity page included lines for projects that had no activity for the relevant period for a staffing profile. (200323)

3600573797: TIME MANAGEMENT

PROBLEM: When multiple users who were assigned the same task submitted their time sheets concurrently, the time sheets did not get submitted correctly. (199647)

NA: PLATFORM

PROBLEM: Problems such as rollup services not functioning correctly occurred if the NLS settings did not indicate US locale parameters. (200236)

3600877016: RESOURCE MANAGEMENT

PROBLEM: Staffing profiles with a status of Complete were considered when calculating resource assignment load. (199923)

3600100058: RESOURCE MANAGEMENT

PROBLEM: The View Forecasted Demand feature for a resource pool displayed staffing profiles with a Complete status as well as staffing profiles outside the relevant date range. (198632)

3600515343: PROJECT MANAGEMENT

PROBLEM: Projects with many tasks could not be scheduled. (199695)

NA: WEB SERVICES

PROBLEM: An error message (exception) appeared when retrieving a request using Demand Management Web services, in which the request included a reference created by a user who was disabled after creating the reference. (201101)

1217845871: PROJECT MANAGEMENT

PROBLEM: When a project is spawned from a proposal, the original owner of the staffing profile remained the owner in the new copy and could not be removed from the access list. (199141)

3600560771: PROJECT MANAGEMENT

PROBLEM: An error message appeared when clicking Create New *<Request_type>* in the history trail ("breadcrumb") of a Project Overview page. (199642)

3600523416: PROJECT MANAGEMENT

PROBLEM: The Reference Update service now runs every minute instead of every 5 seconds. This service handles synchronization between request and request (as in the case of blocking predecessors) and request and tasks when a request has been updated and the a target entity happens to be locked. This is a rare occurrence, and the Reference Update service will handle those rare occurrences. (199228)

3600392769: COSTING

PROBLEM: A required field in a project request type prevented a capitalized cost project from appearing in the Capitalized Project Breakdown portlet. (200256)

3601225501: PROJECT MANAGEMENT

PROBLEM: A Java error message appeared when saving a time sheet, after the session timed out. (200901)

3600684820: RESOURCE MANAGEMENT

PROBLEM: An error message appeared when attempting to softbook or commit a resource; this happened for users without the Edit All Staffing Profiles access grant or certain other access grants for a specific staffing profile. (199687)

3600568607: RESOURCE MANAGEMENT

PROBLEM: Completed staffing profiles were visible on the View Resource Load page. (200387)

3600702104: DEMAND MANAGEMENT

PROBLEM: When using the Query Builder, selecting a field that is a drop-down list then the comparison operator of IN displayed a drop-down selection. It is now a multi-select list. (199474)

1218499406: TIME MANAGEMENT

PROBLEM: By copying time sheets, duplicate time sheets could be created even when the time sheet policy was set to disallow multiple time sheets for the same time period. (199568)

1218260598: TIME MANAGEMENT

PROBLEM: Adding work items to My Suggested Items led to a mismatch in between the Hours Added in the My Suggested Items list and a time sheet. An error message appeared when saving the time sheet, indicating a problem with the Actual Effort amount. (200100)

1218546773: DEMAND MANAGEMENT

PROBLEM: When using Microsoft Internet Explorer, it was possible to bypass required date fields. (199650)

3600913241: DEMAND MANAGEMENT

PROBLEM: Query Builder results were incorrect if two Query Builder searches were conducted in the same session using different tabs or windows. (200101)

1-716288493: RESOURCE MANAGEMENT

PROBLEM: The following filters can now be used to find a resource pool for a staffing profile:
- Resource Pool
- Primary Org Unit
- Resource Pool Manager
- Resource Name

(197645)

3600329502: PROJECT MANAGEMENT

PROBLEM: An error appeared for the Project Gantt portlet when com.kintana.core.server.ENABLE_PORTLET_FULL_RESULTS_SORTING was set to true. (199741)

3600504932: RESOURCE MANAGEMENT

PROBLEM: Changing a holiday non-working day to a working day in the regional calendar was not reflected in the resource calendar. (199425)

3600559266, 3602103273: PROJECT MANAGEMENT

PROBLEM: The header field of the Project Overview page was not refreshed after a project was submitted. (199351)

1218257685: PROJECT MANAGEMENT

PROBLEM: "10"% in the Task Details page was interpreted as "100"%. This occurred for locales in which a comma, not a period, is used as a separator in numbers. "10,0" was interpreted as "100," not "10.0."

3600187518: RESOURCE MANAGEMENT

PROBLEM: The incorrect value for Effort was displayed when hovering over the resource in the Assignment Details section of the Capacity/Load tab. (198440)

Enhancements and Fixes in Service Pack 6

The following certifications and defect fixes were made in Service Pack 6.

Certifications

- Support for Document Management 5.3 SP5.
- Support for Microsoft Windows Server 2003 R2 SP2, Standard and Enterprise Editions.
- Support for Microsoft Office Project Professional 2007, connected to Microsoft Project Server 2007.

See the *System Requirements and Compatibility Matrix* for additional information.

Fixes

The following items (identified by a tracking number) were fixed in Service Pack 6:

1-732275953; 1217820272 TIME MANAGEMENT

PROBLEM: The Activity field does not appear when entering tasks using the My Tasks portlet. (197608)

1-700684943: TIME MANAGEMENT

PROBLEM: End dates in time reports revert to the start date for scheduled reports. (196830)

1-723352303: TIME MANAGEMENT

PROBLEM: It was possible to create multiple time sheets for an individual. (197321)

2215505911: RESOURCE MANAGEMENT

PROBLEM: Half an input cell is visible on the Add Position dialog box, in the Assignments Needed section. Clicking the cell causes misalignment between headings and cells in the section. (198667)

1-726241695: RESOURCE MANAGEMENT

PROBLEM: Assigning resources is slow to populate data for the staffing profile. (197864)

3600045299: RESOURCE MANAGEMENT

PROBLEM: Creating a staffing profile and assigning positions had performance issues. Solution: The number of resource rate rules for budget sync calculation is limited. (199311)

12345678: INSTALLATION

PROBLEM: Deploying ACL 2.0 failed on PPM Center version 7.1 Service Pack 5. (199532)

1218258295: TIME MANAGEMENT

PROBLEM: In PPM Center version 7.1 SP5, when importing a request through the open interface, fields show only the CODE value instead of the MEANING value. This happens on all fields with "Auto Complete List" or "Drop Down List" validation type that have are using a SQL query. (199328)

1-724941838: INTEGRATIONS

PROBLEM: There were too many user prompts in the integration with Microsoft Project. In particular, when projects resided on Microsoft Project Server, a prompt appeared when data was sent to PPM Center, telling users to check in changes on the Microsoft Project Server side. The prompt has been removed and its message moved to the Integration Complete prompt, which appears as the last dialog box after sending is complete. (199766)

1-712769563: RESOURCE MANAGEMENT

PROBLEM: The XML Importer did not work correctly for staffing profiles linked to proposals. (197278)

1-738075999: INTEGRATIONS

PROBLEM: If you removed a resource from a task in a Microsoft Project work plan, and the resource had some actual effort entered for the task in PPM Center, sending an update of the work plan to PPM Center caused the actuals to be removed from PPM Center. (197931)

1-714440123: RESOURCE MANAGEMENT

PROBLEM: An error appeared when linking a Staffing Profile to an Org Unit when the Org Unit was set to inherit region from its parent Org Unit. (197046)

1-728086893: INTEGRATIONS

PROBLEM: If PPM Center authentication is implemented using a single sign-on service like Siteminder, the "User Input Required" screen shown in Microsoft Project for authentication sometimes becomes unresponsive after flickering multiple times. (197636)

1-731506663: DEMAND MANAGEMENT

PROBLEM: The database exhausts all the swap space if the token text has [="..."] signature. (197368)

1218329675: DASHBOARD

PROBLEM: Dates were not formatted correctly when exporting to Excel on a non-English system. (199355)

1218329675: DASHBOARD

PROBLEM: Dates and time formats did not display correctly when the browser language was set to French. (199735)

200157: DEMAND MANAGEMENT

PROBLEM: In Service Pack 5, Notes were not expandable if a Request was opened through the Attachment section or when opened in a windoid. (199128)

1-730180024: RESOURCE MANAGEMENT

PROBLEM: There were performance issues with several Resource Management portlets. (198697)

1-704129801: RESOURCE MANAGEMENT

PROBLEM: There were performance issues with the Run PPM Organization Unit Interface and the Import Users reports. (198070)

1-742212283: RESOURCE MANAGEMENT

PROBLEM: When assigning resources to a staffing profile, there were performance issues when the resource pools had more than 1000 resources. (198125)

3600168593: RESOURCE MANAGEMENT

PROBLEM: If projects to budget cost rollup mode was set to Partial (only labor costs are rolled up) , the rolled up labor actuals in the budget became zero when any of the budget numbers was added or modified, and the budget was saved. (198483)

1-730180024: RESOURCE MANAGEMENT

PROBLEM: The Analyze Resource Pool portlet had poor memory usage. (198698)

1-693483463: RESOURCE MANAGEMENT

PROBLEM: In the Analyze Resource Pool portlet, when drilling down to the View Data table, the Forecasted details for one specific role is not shown. (198666)

1-708170661: DEMAND MANAGEMENT

PROBLEM: Batch Update: There was no user warning if reconfirm page fields were to be erased. (196830)

1-703943653: DEMAND MANAGEMENT

PROBLEM: Batch Update: Clicking the Done button returned the user to the previous screen. There was no indication whether the batch update was successful. (196821)

Known Limitations in Service Pack 6

PROBLEM: When editing a task on the Enter Actuals page, changing the Percent Complete and clicking Done, without moving focus from the Percent Complete field, does not save the changed percent complete. (199317)

PROBLEM: The percent complete of a summary task changes to 100% when the summary task status is changed to Cancelled. (198950)

PROBLEM: TIME MANAGEMENT: After upgrading to Service Pack 5, when saving a time sheet, the following error may appear:

Actual Effort/(Actual Effort + Estimated Remaining Effort)*100 must be equal to PercentComplete (+-.5).

Workaround: Change the client Regional Settings to "English (United States)" and the Location to United States. Make sure Italian is not set as the Browser Language.

Alternatively: Turn off the "Track Estimated Remaining Effort per resource assignment" option in the project settings. (200100)

PROBLEM: Currency field validations for Swedish krona do not work. (199872)

PROBLEM: The Validations report does not run when the "Validation from" and the Validation to" fields are empty, even though those fields are not designated as required fields. (200473)

Support

You can visit the HP Software support web site at:

www.hp.com/go/hpsoftwaresupport

This web site provides contact information and details about the products, services, and support that HP Software offers.

HP Software online software support provides customer self-solve capabilities. It provides a fast and efficient way to access interactive technical support tools needed to manage your business. 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 an active support contract. To find more information about support access levels, go to the following URL:

http://h20230.www2.hp.com/new_access_levels.jsp

To register for an HP Passport ID, go to the following URL:

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