daptiv™

About Daptiv PPM

Spring '08 Edition

1008 Western Avenue, Suite 500
Seattle, WA 98104

p. 206.341.9117
www.daptiv.com

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About Daptiv PPM Spring '08

Introduction

The Spring '08 Edition of Daptiv PPM is an exciting update for our customers and includes a number of important new features as well as improvements to existing features.

This document introduces new and improved features and provides some "walk through" scripts to help you explore the changes to Daptiv PPM. Also included are known issues specific to this release.

Note: We are committed to continually improving Daptiv PPM and every release includes new and updated features. We rely on input from customers and end-users to help us address business problems adequately. Your input is welcome.

Features of the Spring '08 PPM release include:

- **Report Scheduling**—You can now schedule recurring runs of reports, including specifying users the resulting report should be emailed to. For more information see Scheduled Reporting.

- **Project Import**—You can now import projects into PPM from CSV or XLS format files. This allows a PPM administrator to quickly populate an enterprise with projects and project members. For more information see Importing Projects.

- **View Settings Persistence**—Many view settings now persist from session to session, allowing each user to further customize their PPM experience. For more information see Configuring Personal View Settings.

- **Custom View Data Export**—You can now export custom view data in PDF or Excel format. This allows you to easily print, email, or further manipulate PPM data. For more information see Exporting Data.

- **Culture and Currency Settings**—Two new settings provide culture-specific support:

  - A new enterprise-wide currency setting gives PPM administrators the ability to specify the currency an enterprise will use.

  - A user-configurable Culture setting gives each PPM user the freedom to configure their personal PPM experience for their native culture.

    For more information, see Culture and Currency.

- **Business Services**—New methods in the PPM Business Services give integrators the ability to work with PPM documents and to access PDF versions of the Gantt Chart. For more information see Web Services Enhancements.

- **System Notifications**—Notifications about system availability and upgrades are now displayed on screen after logging in, with an option to hide them once you've seen them. For more information see System Notifications.

- **What's New Link**—A link now gives you easy access to information about what is new in the current release. For more information see What's New Link.

- **Performance Improvements to Capacity Planner**—Daptiv has improved the performance of the Capacity Planner application. For more information see Performance Improvements.

- **Updated Outlook Integration Client**—The Daptiv Outlook Integration client has been updated to fixed known issues. Users of Outlook Integration from previous versions of PPM will need to upgrade their client. For more information see Outlook Integration.

Scheduled Reporting

Daptiv PPM Spring '08 adds scheduling capability to PPM Reports, allowing you to schedule recurring runs of reports with output automatically sent in email other users. You can select one or more output formats to be used. This allows you to schedule a report to run at night, with the output in stakeholders' email the next morning.

Try it out

Give the new report scheduling a "test drive" to see how easily you can schedule a PPM report.

TO SCHEDULE A REPORT:

1. In PPM, click the **Reports** tab to open the Reports application.

> **Tip:** If you do not see the **Reports** tab, click **See All** and select **Reports** from the list of all available PPM applications. If **Reports** is not listed, you may not have the appropriate permissions to access PPM Reports.

2. In the Reports application, for the report you want to schedule, click the Actions icon and **Report Schedule**.
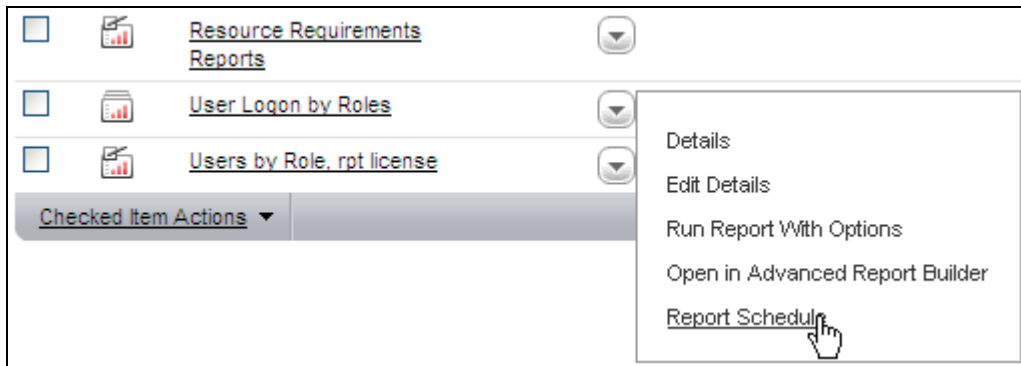
The Report Details window opens, with the **Scheduling** tab selected.

3. In the **Schedule Status** section, select **Enabled**.
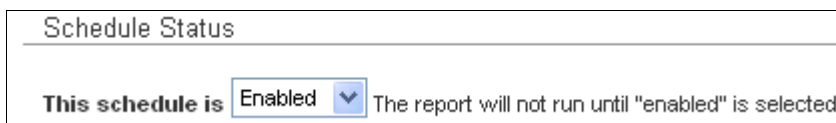
4. In the **Report Schedule** section enter the following:

- **Start**—The date and time that the scheduled report should first run.
- **End**—If the report should run indefinitely, select **No End Date**.
  If you want the report to stop running after a particular day and time, select **End By** and specify the date and time the scheduled report should last run.
- **Run report by**—The frequency the report will run. Reports can be scheduled to run **Daily**, **Weekly** or **Monthly**.

5. Specify who should receive the output of the report:
   Note: Required fields are marked with an asterisk (*).

- **To**—The email address of one or more users to whom the report will be emailed.
  Separate multiple addresses with semi-colons (;).
- **Cc**—The email addresses of any other users that should receive the report.
  Separate multiple addresses with semi-colons (;).
  Note: Click **To** or **Cc** to specify PPM users from the Enterprise User Directory.
- **Subject**— The subject line for the email containing the report output.
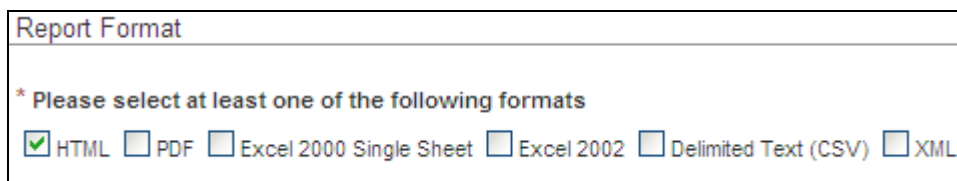- **Body**—The body of the message (if any) for the email containing the report output.

6. In the Report Format section select one or more formats for the report output. If you select multiple formats each recipient receives an email message with multiple attachments containing the report output in the different formats:

- **HTML**—Displays the report as it would be displayed within PPM.
- **PDF** —Gives users the ability to easily print reports.
- **Excel 2000 Single Sheet**—Produces reports on one sheet that you can view in Microsoft Excel versions earlier than 2002.
  Report is sent in HTML format but can be opened in Excel and saved as a native Excel file.
- **Excel 2002**—Produces reports you can view in Microsoft Excel versions 2002 and later. Report is sent in MHT format but can be opened in Excel and saved as a native Excel file.
- **Delimited Text** (CSV)—Produces output in comma separated value (CSV) format so you can open them in applications such as Microsoft Excel or Wordpad.
- **XML**—Produces a report in XML format. Useful if a user will be importing the report XML into another application for editing or viewing.

Report Format

* Please select at least one of the following formats

☑ HTML ☐ PDF ☐ Excel 2000 Single Sheet ☐ Excel 2002 ☐ Delimited Text (CSV) ☐ XML

7. Use the Prompt Values section to set or override simple prompt defaults.

   If the report does not include any prompts, a message tells you this.
   If a default prompt value has been set, that value is listed.
   Note: Reports that include complex prompts (prompts with options that depend on user input in previous prompts) cannot be scheduled.

8. Click **Save** to save the report schedule details**.**

What You Need to Know About Report Scheduling

Be aware of the following when using the Report Scheduling capability:

- **Complex Prompts:** You cannot schedule a report that includes complex prompts. Complex prompts are prompts whose options depend on user input (a previous prompt).

- **Deactivating Enterprise Users:** If a PPM user with scheduled reports is removed (deactivated) from the enterprise:

  - Private reports are no longer available and no longer run.

 - Public reports continue to run and fail with a Cognos error:

    CNC-SEC-3403 The user account information is invalid, or it is missing in Content Manager. CAM-AAA-0194 Authentication to the namespace 'eproject' failed. CAM-AAA-0180 The 3rd party provider returned a user recoverable exception. Login Failed

    To fix this, disable the schedule of any reports scheduled by an enterprise user who has been removed.

- **Task Status with Drill-Through dashboard report cannot be scheduled:** This sample report cannot be scheduled.

Import Projects

Daptiv PPM Administrators can now import multiple projects from an Excel spreadsheet or a CSV file to quickly populate a new PPM enterprise with existing data. After the projects have been imported the project manager can add tasks and other project details.
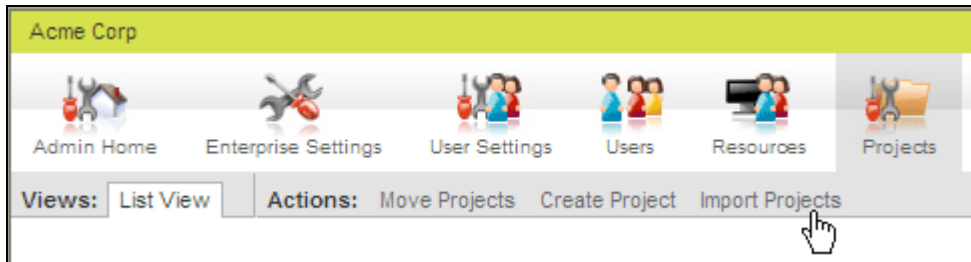
Try it out

Give the Import Projects feature a "test drive" to see how it can help you populate an enterprise with projects.
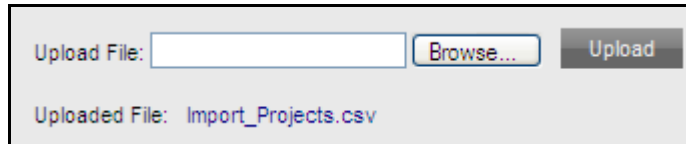
Note: To import projects you need to create an Excel file (.XLS) or a comma separated value file (CSV) with the project information you are importing. You cannot import Excel workbooks in Excel 2007 format (.XLSX).

At a minimum, your file should include a header row with names for the data in the file, and data rows with information for the required project fields (Budget, Planned Start, Planned Finish, Priority, Project Name, Health) as well as any custom fields for the project type.

TO IMPORT PROJECTS:

1. In the Administrative Console, click **Projects** and **Import Projects**.
   The Import Projects Wizard opens in a new window.

2. Use the Project Type list to specify the project type for the projects you are importing and click **Next Step**.
   Note: The project type you select impacts the fields that are available for mapping in later wizard steps. For example, If a project type includes custom fields, those are listed during the mapping step.
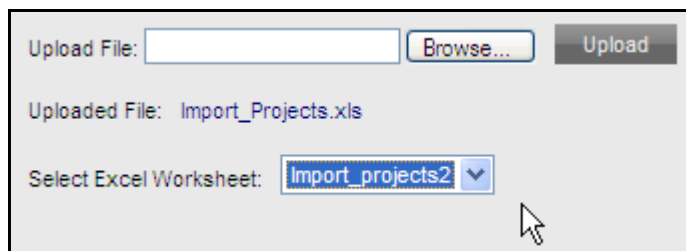
3. Select and upload the file containing the project data you are importing:

    a. Click **Browse** to browse to the XLS or CSV file containing the data you want to import.

    b. Click **Upload** to upload the file to PPM.
When the file has been uploaded, the file name is listed beneath the Upload File box:

    c. If the file is an Excel file with more than one worksheet, select the worksheet containing the data you want to import (this option is not available unless there are more than one worksheets):

    d. Click **Next Step** to continue.

4. Map the fields in your file to fields in Daptiv PPM. Required fields depend on the project type you select in Step 1 of the wizard. Fields from the import file are listed on the left side, and PPM fields for the selected project type are listed on the right. Required fields are marked with an asterisk (*).

   If a field name in your upload file matches a field name in PPM, the wizard automatically maps the fields (for example, a file field called "Manager" will be auto-mapped to the PPM field "Manager").

   Click **Next Step** to continue.

5. Map any users in the import file to PPM users.
   The Import Projects Wizard will auto-map names in the import file that directly match PPM user names (you can unmap these and remap them if the mapping is not correct). To manually map a user from the file, click the user name in the **Import File Users** list, click a Daptiv PPM Users name to which it should be mapped, and click **Map**.

   Note: The list of Import File Users is based on the data in the import file that was mapped to the Manager field, and on any other member fields that were mapped with import file data.

   Click **Next Step**.

6. In Step 6, verify that the projects you want are going to be imported. Errors in import data are shows in red, and projects that will not be imported due to bad data are noted.
   Click **Import**.

What You Need to Know About Importing Projects

Be aware of the following when using the Import Projects capability:

- **Import File Data and Project Type:** You should understand what data is required for the project type you are going to import before you begin. The project type you select in the first step of the import wizard impacts what fields you must have data for in your import file. Understanding the project type and its required fields is critical to using the Import Project feature successfully.

- **File Format:**
    - You can only import data from comma separated value (CSV) files or from Excel files in Excel 97-2003 workbook format (.XLS).
    - If your file contains non-Latin characters, be sure to save it as Unicode. If you do not, the non-Latin characters will not import correctly

- **Required Fields:** Your import file must include data that maps to all required fields for the project type you are importing.

- **Valid Field Data:** Data in your import file must be in valid format for the PPM fields to which it maps. See the Online Help for details on valid data for each PPM field or field type.

- **Importing Duplicate Projects:** Importing the same file twice will result in duplicate projects. If you reach the Preview step (Step 6) and see data you want to change or correct, cancel the import and update the import file, then upload it again and work through the wizard to import the projects.

Export Data

Users can now export data from PPM application custom views. Export allows you to create PDF files (for printing or sending to others) and Excel-compatible format files you can further manipulate for presentation or integration purposes.

Export replaces the **Print** option in most global applications.

The **Export** option appears on the view toolbar of most global applications:
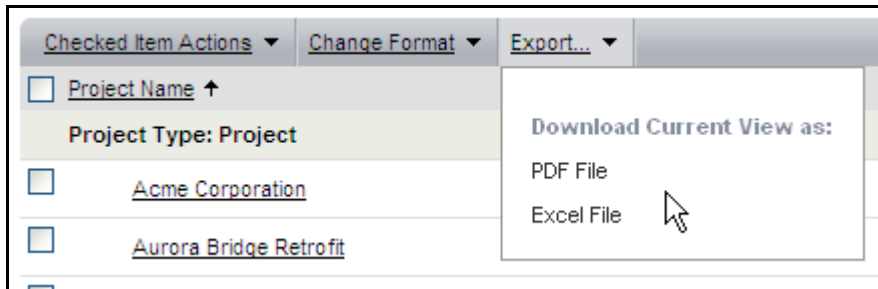
Highlights

- Export in Excel format on most global custom views (Projects, Tasks, Issues, DA's, etc.)

- Export in PDF format for printing and emailing.

- Users can save the exported file in Excel as a native Excel file to utilize full Excel capabilities, such as macros and custom formatting.

What You Need to Know About Exporting PPM Data

Be aware of the following when using the Export capability:

- **Export File Name:** The name of your exported file is based on the name of the custom view you export, using this convention: "**<application name> - <custom view name>.xls**". For example, "**Tasks – My Overdue Tasks.xls**".

  - If the custom view name includes symbols that are not valid, these are discarded.

  - Spaces in a view name are converted to underscores when using Internet Explorer.

  - Spaces in a view name are left untouched when using Firefox.

  - The file name will not be truncated, no matter how long. Rename the file when you save it if you need a shorter name.

- **Excel 2007 Warning:** A warning message displays if you are using Excel 2007 and select **Excel File** as the download format:

  The file you are trying to open, <file name>.xls, is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

  You can safely open the file. Click **Yes** to open the file.
- **Long Data Fields:** In Excel 2007 does not fully support HTML, so text data cells that contain more than 255 characters display as hash marks (####). If the file is saved as a Web Page (.htm or .html) the data is saved as "####" and the original data is lost. To retain data, save the file as an .XLSX file.
- **Saving Excel Export File:** When saving your exported data in Excel, your file name may include quotation marks (" ").

Culture and Currency Settings

Enterprise-wide Currency Setting

PPM administrators can now configure a global currency setting for their enterprise. This setting determines the symbol displayed for any currency field in PPM. **Note:** The user-specific culture setting controls how numeric fields (including currency fields) are formatted. See below for more information.

Configure the enterprise-wide currency setting in the Administrative Console, on the General Properties tab of Enterprise Settings:

User-specific Culture Setting

A new user-specific Culture setting allows users to configure how dates and numeric fields are displayed. The Culture setting affects date format, day and month names, which date is considered the first day of the week, and the decimal and thousands separators for numeric fields (including currency fields).

Configure your culture setting by clicking your name in the main PPM window and **Edit User Settings**.
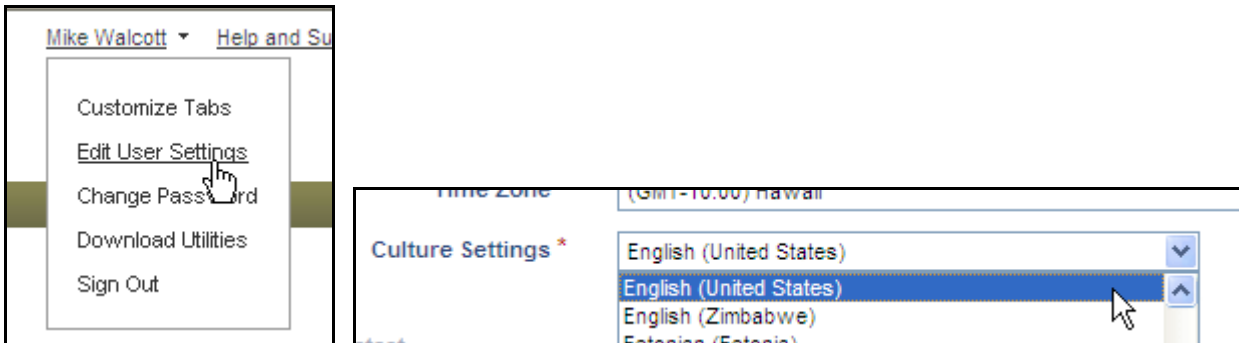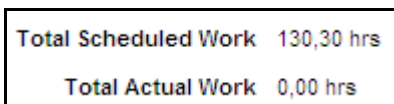

The culture setting impacts formats of date fields and other numeric fields.

For example, if you set your culture setting to **French (France)**, dates are displayed like this:
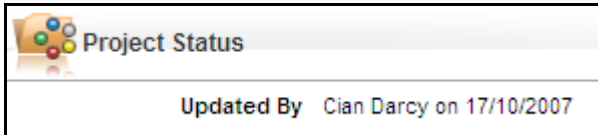
and numeric fields are displayed like this:

What You Need to Know About Currency and Culture Settings

Be aware of the following when using the Currency Setting:

- **Currency Setting Impacts Currency Symbol:** The currency setting for the enterprise impacts the currency symbol that is displayed with any currency fields. It does not convert any data in the database. Switching from one currency setting to another has no impact on the stored data.

Persistent Settings

Daptiv PPM now remembers many common view settings such as number of items displayed on a page, filter settings, and project view format. In addition, when creating new tasks, documents and issues from global applications, the project you select is retained for future item creation (you can change it at any time). Task type settings and approval policies for documents and dynamic applications are remembered until you change them.

Note: Column sorting of custom views is retained only for the current session.

Highlights

Unless otherwise noted, all settings are retained for each user and each screen until changed.
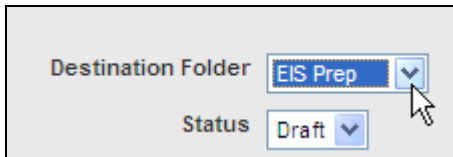
- Global-Tab Custom Views

    - Items displayed per page (including **Show all items**)
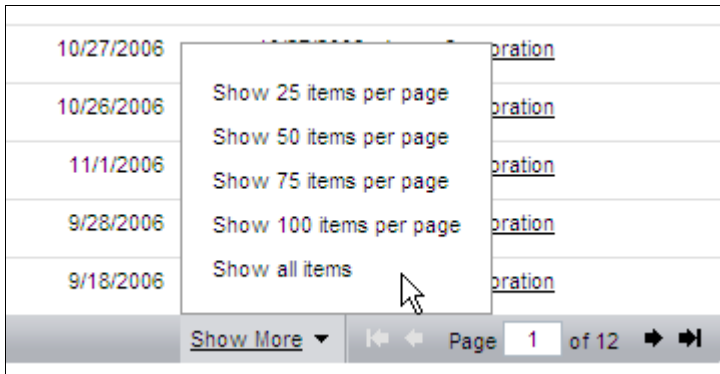
- **Change Format** settings (including **Hierarchy View** on Projects Tab)
- All UI-level view settings in Team Manager (**Show** and **Show by time** options) and Capacity Planner (**Show as** and **Show requirements as** options)
- Project selection value for global **Create <item>** wizards:
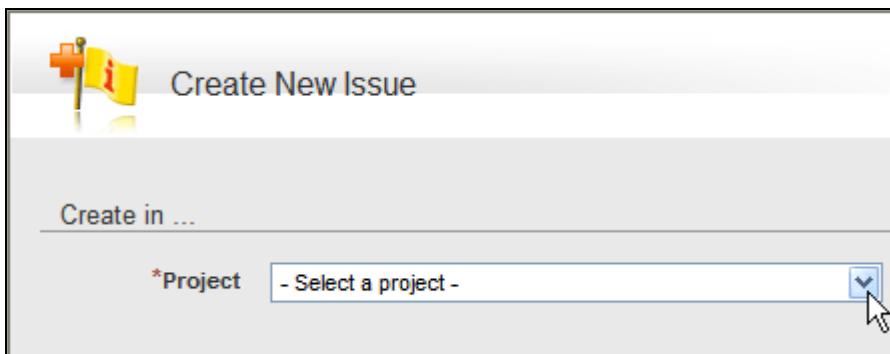
- Destination Folder value for Document Upload:

- Column Sorting (remembered during single session, reset on logout)

- Project-level Item Lists & Folder Views
    - Items displayed per page (including **Show all items**)
    - **Show**… filters (where applicable)
    - **Change Format** settings (where applicable)
    - Column Sorting (remembered during single session, reset on logout)

- Additional Remembered Settings
    - Approval policy for creating/editing Documents and Dynamic Application Items
    - Task Type
      Note: The default task type is now **Fixed Duration**, **Non-Effort Driven** until changed by a user. Once changed, the default task type remains the value selected by the user until changed again.
    - Task Type settings
    - Task outline levels
    - Capacity Planner

What You Need to Know About Persistent Settings

Be aware of the following when using the persistent settings:

- **Sorting of Custom Views:** When you sort a custom view by clicking a column heading this will not persist. If you move away from the view and return to it, the view reverts to its original sorting (as defined in view itself). To permanently change how data in a view is sorted, edit the view.

Web Services (Business Services)

Four new web services enhance the Business Service Toolkit, making it further possible for third party applications to more fully integrate with PPM.

A PDF version of the Business Services Methods documentation is now included in the Business Services Toolkit in addition to the CHM format.

Highlights

- **Upload Document**–Users can upload documents via web services.
- **Update Document**–Users can update documents via web services.
- **Download Document** –Users can download documents via web services, using a variety of input parameters.
- **Get PDF Gantt Chart**–Users can download Project Gantt Charts in PDF format via web services.

Inline System Notifications

Upon login, users are automatically notified of any impending system downtime and can then select whether or not to see the notification again next time they login. Users are taken to their PPM start page after they take action on the notification.

What's New Link

Users can access links to training and other educational materials related to the current release with one click by selecting the ***What's New*** link at the top of the main PPM window.

Performance Improvements

Users can expect improved performance when using Capacity Planner. Capacity Planner loads large amounts of data and can respond slowly. Daptiv engineers have worked to improve response with this application.

Outlook Integration Client Update

Fixes to known issues in Outlook Integration require users to update their local Outlook Integration client before synchronizing Outlook with PPM Spring '08 edition. An upgrade message displays when you try to synchronize using the old client. **Note:** The URL in the message is incorrect. Download the new Outlook Integration client from the Utilities page in PPM. For more information, see *Known Issues of PPM Spring '08.*

Known Issues for PPM Spring '08

Scheduling Reports –

- Scheduled reports run based on the PPM User's time zone.
- If a scheduled report fails, the error message does not say why. Contact Daptiv Support for more information about why a scheduled report run failed.
- Public reports scheduled by a user who is removed from the enterprise will continue to run with an error until an administrator disables the schedule for that report.
- Task Status with Drill-through (sample report) cannot be scheduled.
- Reports that include complex prompts cannot be scheduled.
- Report output when Excel format is specified: Report output is either HTML (Excel 2000 format specified) or MHT (Excel 2002 format specified).

Persistent Settings –

- Sorting by column heading on a custom view does not persist (this is by design).

## Exporting Data –

- Exported data file names are derived from the custom view name:

    "<application name>-<custom view name>.xls"

    o The name has quotations around it.
    o The name is not shortened (to shorten, edit the name on saving the file in Excel).
    o Spaces in the custom view name are retained if using Firefox.
    o Spaces in the custom view name are converted to underscores (_) if using Internet Explorer.
- Saving an exported data view – long data fields (more than 255 characters) show as hash marks (#). *If you save the file as a "Web Page" (.htm or .html) the cell is saved with the displayed string rather than the actual data, and the data is lost.*

    Important: To preserve data, save an exported view using **Save As** and specify a .xlsx file.

![daptiv logo]

Outlook Integration –

- Incorrect URL in upgrade message.

    The message displayed to existing users of Outlook Integration about updating their local client contains an incorrect URL:
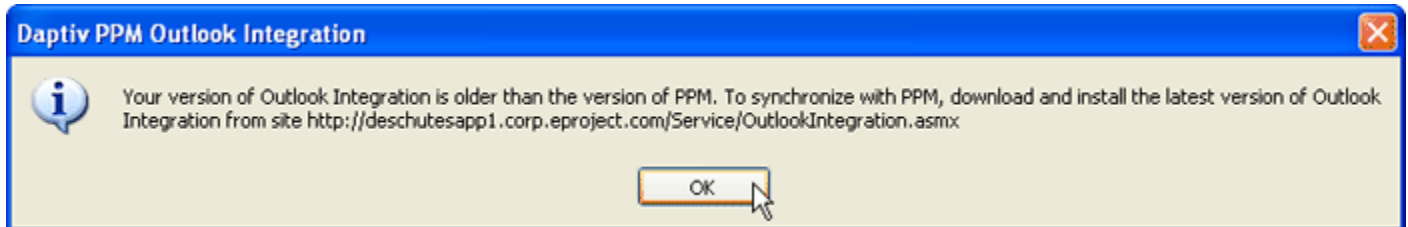
TO UPDATE YOUR OUTLOOK INTEGRATION CLIENT:

1. Navigate to the Download Utilities page in PPM

2. Click **Download** to download and install the Daptiv Outlook Integration client:

    Note: You must close Outlook while upgrading the Outlook Integration client.