About Daptiv PPM –

Spring '09

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Contents

Introduction

The Spring '09 Daptiv PPM release adds improved functionality including the official launch of the new Gantt Chart and fixed issues.

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

Spring '09 PPM release includes:

- **Gantt Chart**—The new Gantt chart has been moved out of "beta" status and becomes the only Gantt chart for PPM. For more information, see *Gantt Chart*.

- **Other Changes**

    - Custom Field Default Values—When creating a custom field, if you define a default value for the field, any existing records will not have that default value set. For more information, see *Custom Field Default Values*.

    Fixed Issues—Customer-reported issues that are fixed in this release. See *Fixed Issues* for more details.

Gantt Chart

Daptiv PPM Spring '09 completes the update of the Gantt chart, moving the feature from beta status to full parity with the old Gantt chart.

The new Gantt chart replaces the old Gantt chart and features a newly written, fresh user-interface that is fast, easy to use, and fully supports both Firefox 3 and Internet Explorer 7.

Note: Access to the legacy Gantt chart is no longer available.
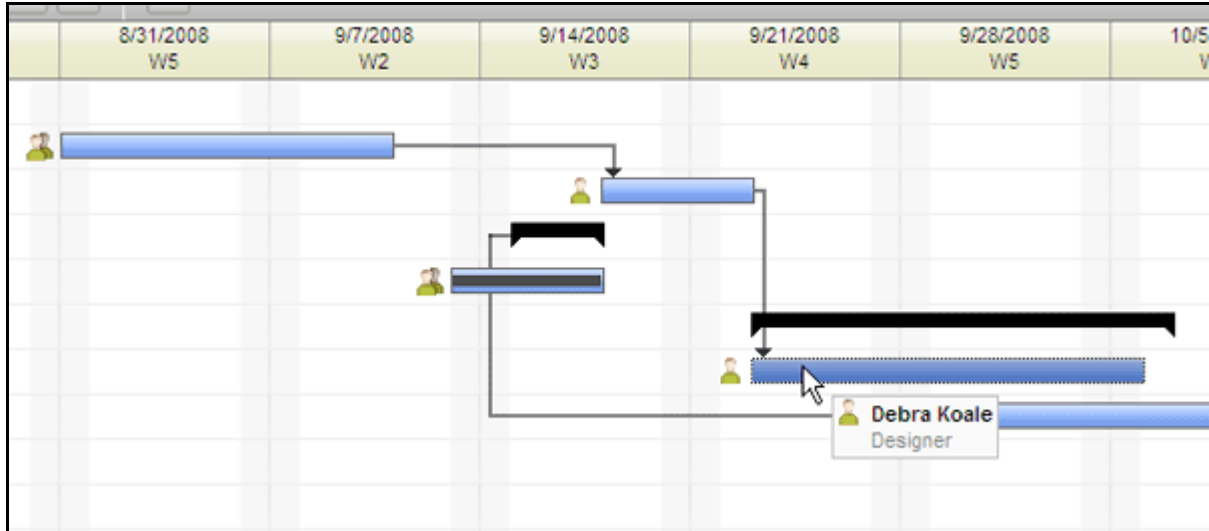
Key Features of the New Gantt Chart:

- **Task grid**—Lists all tasks

#	Task	Duration	%	ETC	Start	Finish	Resource Names	Pre
1	Preliminary data gathering	0 days	0%	0.00	8/26/2008	8/26/2008	Charlie Higgin	
2	Prepare EIS draft	11 days	0%	144.00	8/31/2008	9/10/2008	Cal Reyer [50%], Charlie Higgin, Debra K...	
3	Draft revision	3 days	0%	24.00	9/18/2008	9/22/2008	Cal Reyer	2
4	⊟ traffic revision plannnning	3 days	91%	0.17	9/15/2008	9/17/2008	Stan Kinomura	
5	Choose subcontractor-trucking	4.33 days	99%	0.17	9/13/2008	9/17/2008	Mike Walcott, Stan Kinomura, Susan San...	
6	⊟ EIS Milestone	11 days	0%	24.00	9/23/2008	10/7/2008		
7	Prepare EIS draft 2	15 days	0%	24.00	9/23/2008	10/7/2008	Debra Koale, Mike Walcott [40%]	3
8	Traffic Plan	25 days	0%	47.03	9/29/2008	10/23/2008	Stan Kinomura	4

From the grid:

- Edit tasks, including changing details and assigning resources
- Copy/paste tasks, preserving dependencies
    - Ctrl-C copies selected task(s).
    - Select another task.
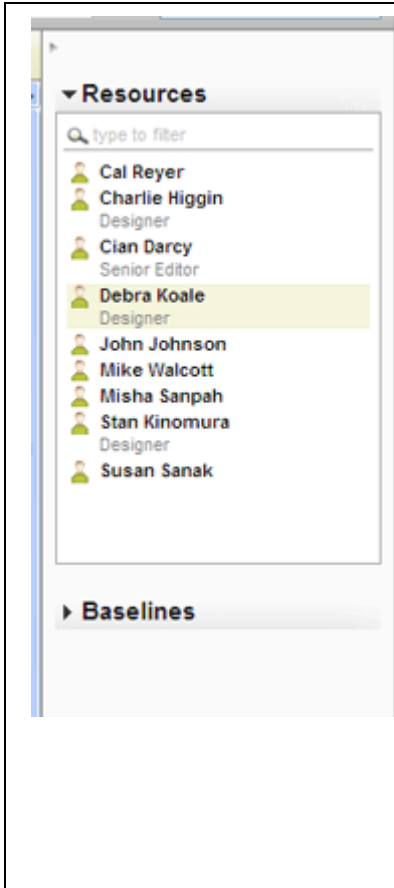   - Ctrl-V pastes the copied tasks above the selected task.

- **Canvas**—Graphical interface to view and edit your project schedule

Use the canvas to:

- Add, change, move tasks
- Create or change dependencies between tasks
- Assign resources to tasks
- View task details
- View resource assignments

- **Sidebar**—Expands and collapses to maximize the display

<table>
<tr>
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▼ **Resources**

🔍 type to filter

👤 Cal Reyer
👤 Charlie Higgin
　Designer
👤 Cian Darcy
　Senior Editor
👤 Debra Koale
　Designer
👤 John Johnson
👤 Mike Walcott
👤 Misha Sanpah
👤 Stan Kinomura
　Designer
👤 Susan Sanak
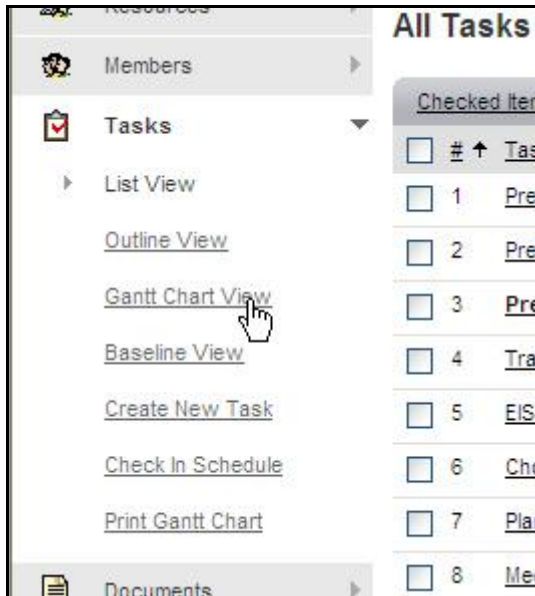
▶ **Baselines**

</td>
<td>

Use the sidebar to:
- View the resource list
  - Shows all project resources
  - View resource utilization (overview and detail)
  - Drag and drop resources to tasks in the canvas to assign
- View Baseline list
  - Lists baselines created from the schedule
  - Click a baseline to see it displayed in the canvas.
    - Blue baseline indicates baseline matches existing schedule
    - Red indicates current schedule is behind baseline
    - Green indicates current schedule is ahead of baseline
  - Create new baselines

</td>
</tr>
</table>

How it works

An option in the Tasks section of the Project Menu gives you access to the new Gantt chart. Click **Gantt Chart View** to open the Gantt chart in a new window.
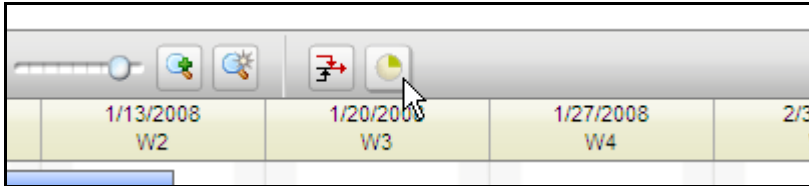

Note: If you use a bookmark to access the Gantt chart, any bookmark for the old Gantt chart will result in an **Item Not Found** page. (This is unusual. Few customers will have bookmarks to the Gantt chart.)
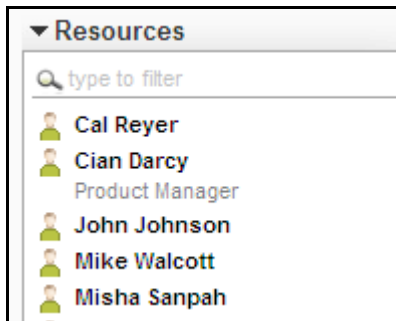
Viewing Resource Utilization

- View resource utilization overview for the time period of a selected task.
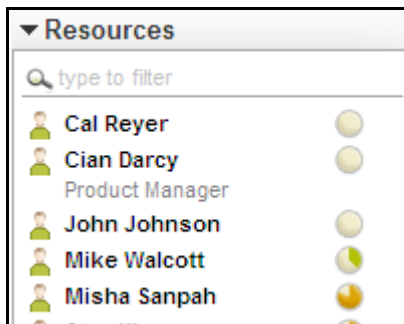
  Toggle on the resource utilization display to see resource utilization icons next to resources in the Resources sidebar:
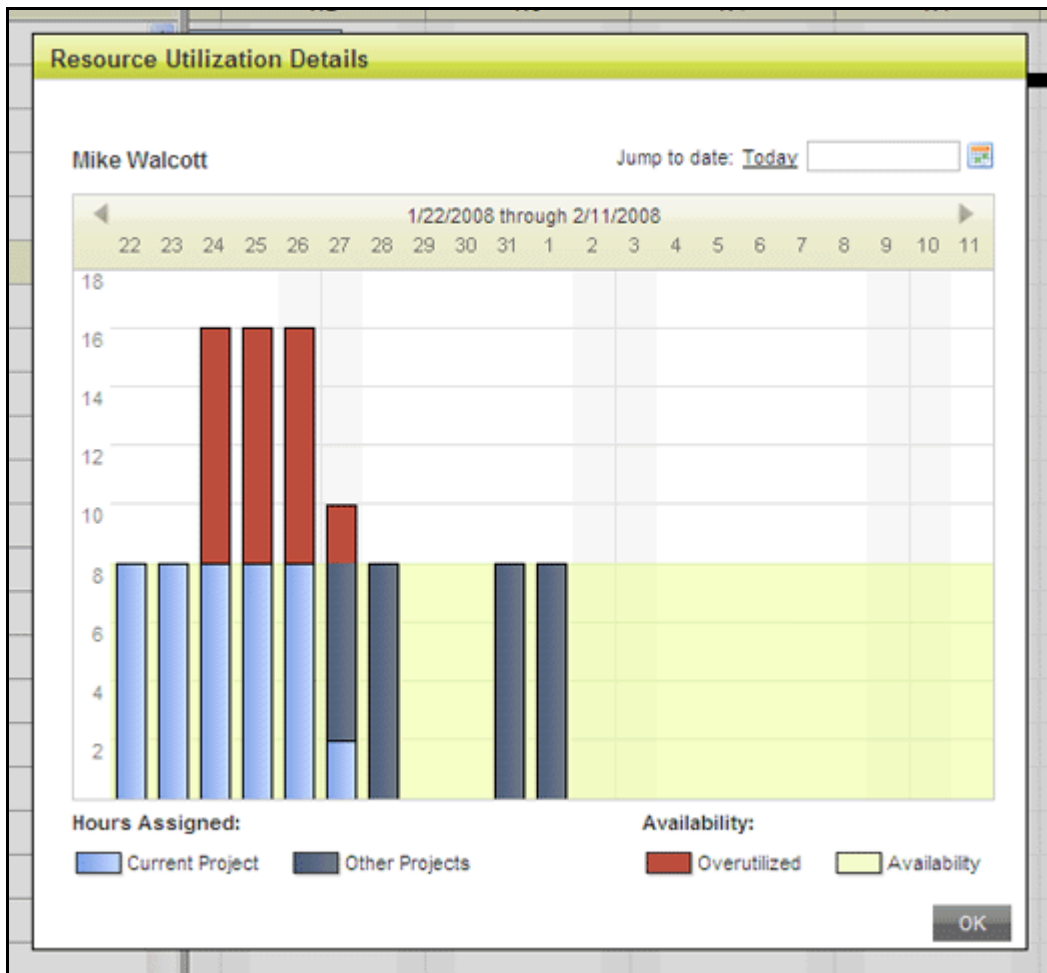

- With no task selected, no utilization icons display.

- With a task selected, utilization icons display a graphical representation of utilization for each resource for the *timeframe of the selected task*.

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- View utilization details for a particular resource for a 3-week timeframe.

  Double-click on a resource name in the Resources list of the sidebar to open the Resource Utilization Details window for that resource.

  - If no task is selected, the window opens starting at the current date.
  - If a task is selected, the window opens starting with the start date of the task.

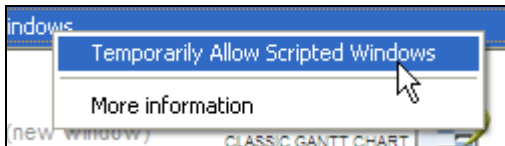## What You Need to Know About the Gantt Chart

Understanding the following will help you take advantage of the new Gantt chart:

- **Error Messages**
  Some error messages display at the top of the Gantt chart and disappear after a few seconds. If you need more time to read a message, position your mouse over the message to fix it in place. The message will remain until you move your cursor away.

- **Firefox 2 Support**
  The new Gantt chart was developed for Internet Explorer 7 and Firefox 3. Firefox 2 does not always correctly display the Gantt chart.

- **Baselines**
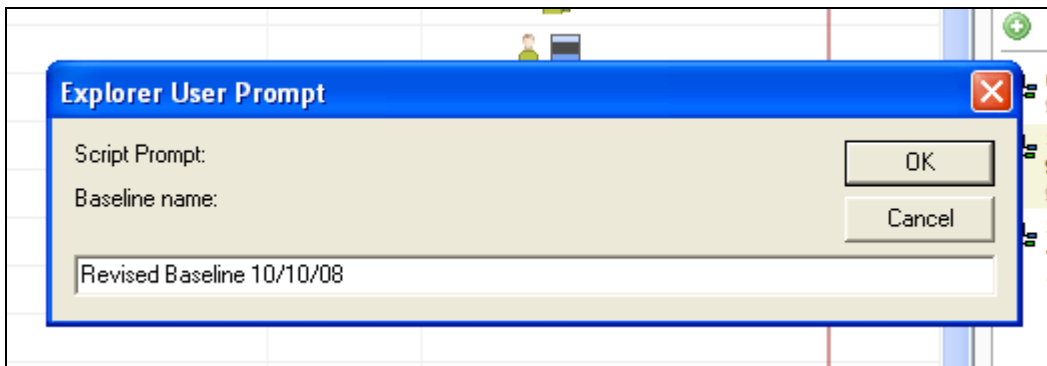 When creating a baseline from the Gantt chart, your browser may block a popup window.

  The blocking message refers to a scripted window:

  If this occurs, temporarily allow the window to display:

  Click the Create Baseline Icon (⊕)again, and give the new baseline a name.

Other Changes

Daptiv PPM Spring '09 includes the following changes to functionality. These changes have been implemented as fixes for customer-related issues or as improvements in existing functionality.

Custom Fields

- **Custom field defaults are not retroactively set**

  When you create a custom field in an existing application and define a default value for that field, existing records (items) from that application are not updated with the default value for the field.

  Note: The one exception is if the new field is a calculated field. Calculated fields are populated through all existing applicable items.

PPM Reports

- **Reports using Project fields and custom fields in dynamic applications now display results that do not have data in the custom field**

  Reports combining query items from the **Projects** query subject and custom field query items from dynamic applications will now return records in which there is no data in the custom field.

  In the past, reports using this combination of query subjects only displayed results where the custom field had data in it. To update your report so that it behaves as it did prior to the Spring '09 release, add a filter to exclude any results where the custom field has no data.

Admin Projects List

- **Quick filters on the Administrative Projects list**

  The Projects list in the Administrative Console now uses quick filters for quick and easy searching in large project lists. Search by project status, project type, and strings within project names.

  For details on using the quick filters, see the *Admin* section of the PPM Online Help.

Known Issues for PPM Spring '09

Gantt Chart

- **Deleting more than 100 tasks**
  You can select and delete multiple tasks at one time in the new Gantt chart (you can do the same in the Task List View and Outline View). There is no enforced limitation on how many tasks you select and delete, but you should *limit the number of tasks you delete at any one time to no more than 100*.

  To delete more than 100 tasks, select and delete them in groups of up to 100.

  Note: This is not a new limitation, but the Gantt chart makes deleting large groups of tasks easier.

Dashboards

- **Changing Layout and adding Report Viewers**
  If you edit a dashboard and change the layout (from 33-33-33 to 50-50 for example), then attempt to add a Report Viewer component without first saving the changed layout, you will not be able to add the Report Viewer.

  To work around this, save the dashboard with the new layout, then add any new components you want.

Custom Fields

- **Giving a custom field the same name as a native field hides the native field from reports**

  If you give a custom field the same name as a native field (if you name a Project custom field **Budget** for example), the native field is no longer accessible using PPM reports, and any reports using the field will display data from the custom field instead. Renaming the custom field to a unique name corrects the problem.

- **Changing field names**

  You can rename a custom field but any reports that include the field will not run correctly until they are edited in Advanced Report Builder to correct the field name. The report will fail with an Expression parsing error:

  The query contains a reference to at least one object '[Presentation].<applicaton>].[<original field name>]'

PPM Reports

- **When scheduling PPM Reports for monthly recurrence, the User Interface does not correctly display the scheduled days**

  If you schedule a report to run monthly (by **Month)** and select any option other than **Last** (for example, The <**First**> <**Monday**> of every <**1**> month(s)), after you save the schedule and go to another screen, the schedule is correctly saved, but will incorrectly display as <**Last**> when you return to the Scheduling tab.

  The report is scheduled correctly, but the user interface always displays **Last**.

Fixed Issues

The following issues are fixed in PPM Spring '09.

Area	Summary	Issue ID
Capacity Planner		
	Capacity Planned column missing from Capacity Planner export to Excel *Support case: 23946*	**32923**
	Capacity Planner export to Excel not showing selected subset of resource types, not showing entire year's available hours *Support case: 24727*	**33881**
	Dark line appears under the project in Capacity Planner *Support case: 30483*	**40603**
	Resource names truncating in Capacity Planner *Support case: 30206*	**47436**
	Capacity Planner Incorrect Calculations *Support case: 34997*	**47776**
	Estimated Cost not correct in Capacity Planner *Support case: 45390*	**54746**
	Capacity Planner displays incorrect calculations *Support case: 34997*	**55910**
Custom Fields		
	Cannot create a Status Field Pick list for certain project types Support case: 35748	**48381**
	Schedule Cost field calculating incorrectly *Support case: 35839*	**48415**
Documents		
	Blank window remains open after document download *Support case: 20447, 25285, 32550*	**21841**
	On Document Details window, 'file name" is truncated *Support case: 20637, 20613, 33066*	**47329**
	Customer cannot open document folder in view of project. *Support case: 32904, 35486, 36035, 38826*	**47577**

Dynamic Applications		
	Exception error when trying to select the folder view of any dynamic application for a specific user in a specific project *Support case: 33526, 33193, 35735, 37489*	**48055**
Executive Tab		
	Estimated Work Calculation *Support case: 34273*	**46713**
Firefox		
	With a Firefox browser window set to less then full screen the "What's New in Spring '08", "your name" and "Help and Support" are word wrapped incorrectly on top of the tabs *Support case: 35224*	**47747**
Gantt Chart		
	Gantt Chart Next button does not work *Support case: 21115*	**25090**
	Gantt chart view: Dependent tasks do not change their start date to the logical earlier start date *Support case: 21176, 27740*	**25288**
	Gantt Chart Dates and Report missing data *Support case: 21964*	**29494**
	Multiple select insert and delete corrupted in Gantt chart *Support case:22508, 22509*	**31441**
	Gantt chart resources in huge block *Support case: 22420*	**31945**
	Accents (eg. French, Spanish) are causing problems *Support case: 23175*	**32923**
	Apply Button in Gantt Chart not working properly *Support case: 23892*	**32976**
	Gantt Chart freezes because of Javascript Error *Support case: 25918*	**36854**
Localization		
	Executive tab: Executive translated as Cadre (Director), default views not translated at all.	**53708**

	Support case: 43910, 43967	
	Admin Password Reset localization error *Support case: 43958, 43921, 46056*	**53781**
	The French translation for ETC is incorrect and should be changed to RAF *Support case: 48058*	**56310**
Project		
History	Estimated work not calculating correctly *Support case: 31508*	**47424**
Admin	Archived Projects Not Showing in Enterprise Admin Archived Projects View *Support case: 33417, 33759, 34572, 34700, 34727, 31010, 38468, 39088, 39711, 39842, 41707, 42143, 45023; 45563, 46149, 46221, 46937*	**47459**
Tasks		
	Material Resource guid shown in global task custom view *Support case: 38003*	**49632**

Team Manager		
	Cannot view more than 25 items at a time in Team Manager view: non project work *Support case: 44113, 44326, 44070, 44071, 45707, 45578, 53784, 47340*	**53784**
Templates		
	Creating a Project from a Template with tasks and dependencies in it will lose the dependencies upon task edit with a red Boolean error. *Support case: 23946*	**32302**
Timesheets		
	Error when trying to submit timesheet *Support case: 32441*	**46538**
Usability		
	Spell Check Popup has old buttons *Support case: 29896, 29859*	**39929**
	Customer submitted PPM6Exception Errors do not have customer information included *Support case: 32417*	**45139**
Reports (PPM)		
	Customer receiving error with WI after a content manager failover *Support case: 34859, 34860, 34862, 34863, 34877, 35473, 35479, 35532, 35533, 35544, 35556, 35555, 35941*	**48029**
	WI report, Timesheet Task Comment Field Truncation *Support case: 32730*	**48243**
	Cross joins error when trying to pull in two query items that don't have any join between them *Support case: 47523*	**53491**
	Update Notes field displays code instead of data. Clone of 53852	**55048**
	Net Capacity in Cognos incorrectly subtracts personal NWT from non-working days *Support case: 42623, 41918*	**55146**
	WI Report: Task status in report is counted with incorrect timezone *Support case: 37321, 37435,40535*	**55147**

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