About Daptiv PPM –

Summer '09

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Introduction to Daptiv PPM Summer '09

With a focus on quality, the Summer '09 Daptiv PPM release improves existing functionality and fixes many customer issues. This document is designed to help you understand how new and changed features impact use of Daptiv PPM, and to guide you in making decisions about how to configure new features (if applicable).

Summer '09 PPM release includes:

- **Pick List Field Management**—Improved user interface and updated functionality give administrators and creators of dynamic applications greater flexibility and increased control when creating or editing pick lists. For more information, see *Pick List Field Management Improvements*.

- **Other Changes**

  - **Improved Password Security**—An automatic process upgrades user passwords as each user logs into Daptiv, encoding the password for improved security. For more information, see *Password Security Improvements*.

  - **Improved Percent Complete and Rollup functionality**—Percent Complete (% Complete) and task rollup functionality has been improved to address specific situations. For more information, see *Percent Complete/Rollup Improvements*.

  - **Improved update process**—When new versions of PPM are deployed, the update process now allows users to log into PPM even if the PPM Reports data model has not finished updating. For more information, see *Update Process Improvements*.

  - **Improved filtering on custom views**

    - **Does Not Contain**—Custom views now include a "Does Not Contain" filter option.

    - **Filter by Assignee**—Custom views for dynamic application now include the option to filter by assignee.

Announcements

Advance Notice: Legacy Reporting to be Discontinued

Legacy PPM reporting, including Advanced Reporting Engine (ARE) and Crystal Reports, will be ***permanently discontinued as of the Fall 2009 PPM release***.

In fall of 2007, Daptiv introduced a new reporting engine and PPM Reports. These replace legacy reporting capabilities with enhanced flexibility, greater access to native and custom data, and two user-friendly tools for creating custom reports. For the last 2 years, legacy reporting has been left in place alongside PPM Reports but in the Daptiv PPM Fall '09 release, it will be permanently discontinued.

This change affects the small subset of PPM users who still do one or more of the following:

- **Run "Canned" reports**
- **Upload Crystal Reports**
- **Create legacy Custom Reports**
- **Run Crystal Reports or legacy custom reports**
- **Use the Project Home "Project Reports" Dashboard Pane**

For more information, see *Legacy Reporting* in the Appendix.

Release documentation combined into single document

Single Release Document—Beginning with the Summer '09 release of PPM, release documentation for customers will be combined into a single document (this document).

In the past, release documentation consisted of one or more of the following:

- About <release>
- Administrator Configuration Notes
- Fixlist

New Features

Pick List Field Improvements

Daptiv PPM Summer '09 improves pick list management with an updated user interface that simplifies and speeds the process of creating or editing custom pick list fields. This addresses most of the Greenhouse request "Ability to edit/rename pick list options" with a total of 400 points.

Note: There are two user interfaces for creating and editing pick lists:

- One for dynamic application fields (in the **Create Dynamic Application Wizard**)
- One for user fields, project fields and native application fields (in the **Custom Field Wizard**)

Both interfaces have been updated and support the improved functionality. The **Custom Field Wizard** is only accessible from the Administrative Console.
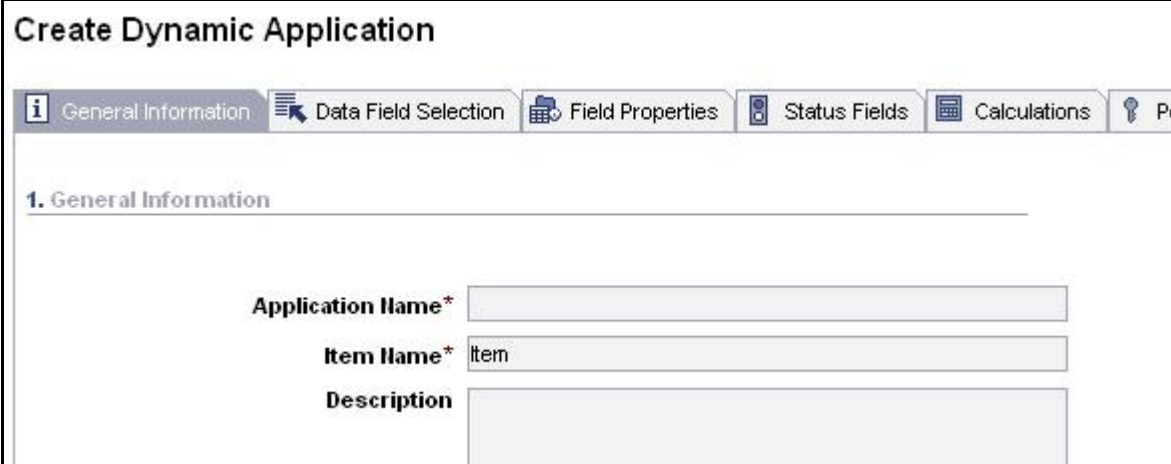
Key Improvements for Pick Lists:

- **Editing existing values**—You can edit existing values in custom pick lists without losing data. When you edit an existing value in a pick list, any records using that value are updated with the changes.

- **Deleting existing values**—The user experience for deleting existing pick list values has been updated to make it easier.

User Interface Changes

Dynamic Application Wizard Changes

The Dynamic Application Wizard no longer includes a **Pick Lists** tab:

In previous releases, the wizard included a **Pick Lists** tab:

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Custom Field Wizard Changes
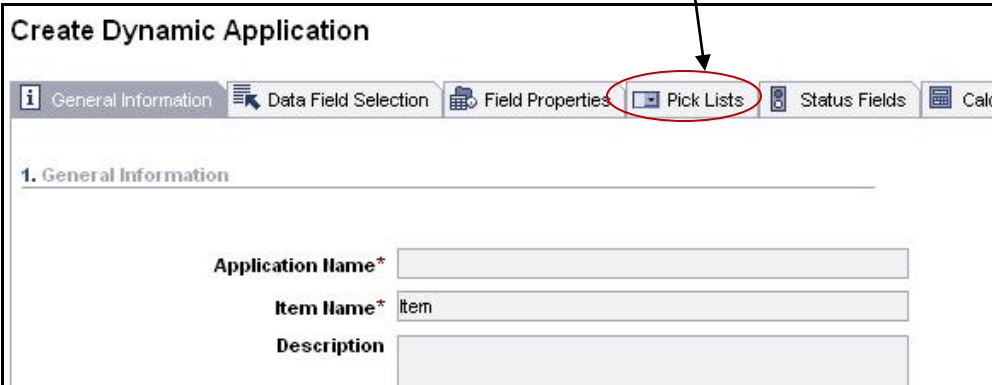
The **Pick List Options** page of the Custom Field Wizard now has this configuration:
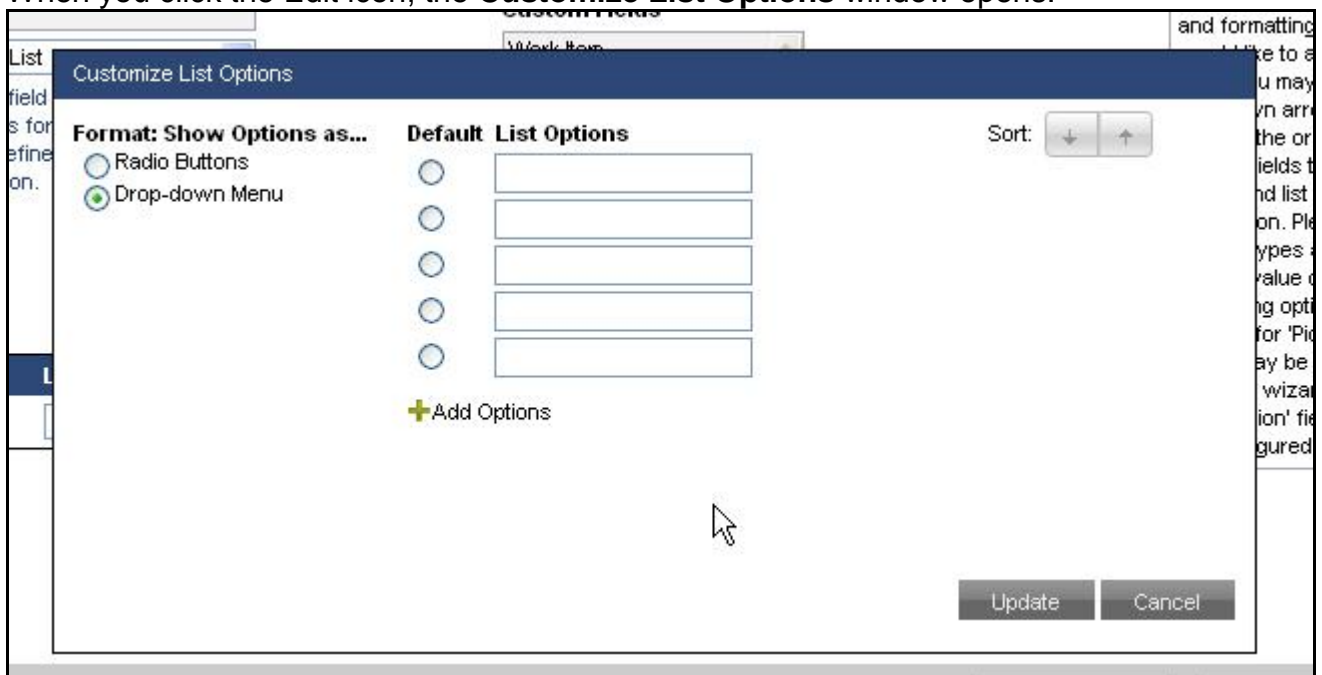

In previous releases of PPM the page looked like this:

![daptiv logo]

Changes to Dynamic Application pick list Configuration:

- On the **Data Field Selection** tab in the Dynamic Application Wizard, when you add a pick list to the Custom Fields list, a new Options section displays:
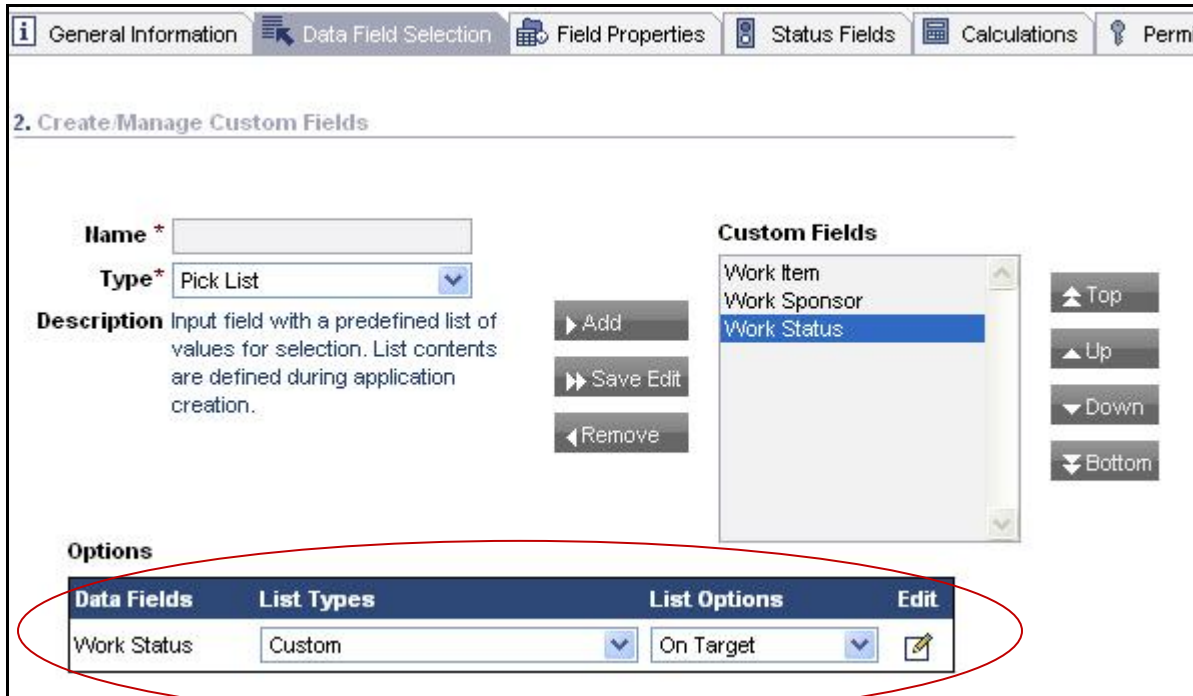
- When you click the Edit icon, the **Customize List Options** window opens:

1. In the **Customize List Options** window, select the list selection format from the **Format** options.

2. Type the options for the list in the **List Options** boxes and, if applicable, choose a default option.

3. To sort the options, click the down (descending) or up (ascending) arrow. This sorts the options you have typed.
   Note: When you click a sort arrow, you perform the sort action on the existing options. If you add a new option, the list is not automatically resorted.

4. When you are done, click **Update** to close the **Customize List Options** window and update the list:

Important: Changes to the list (additions, edits and deletion of list options) are not finalized until you click **Save & Finish** in the Dynamic Application Wizard.

Tips for Managing Pick List Fields

Understanding the following will help you make the most of the updated pick list functionality:

- **Deleting Existing Options**
  Moving an option from one location in the list to another is the same as deleting the option and adding a new option. Any application items using the original (deleted) option are updated and the data deleted.

- **Update and Save & Finish**
  When creating, editing or deleting pick list options, the changes are not finalized until you click **Save & Finish** in the wizard. Clicking **Update** refreshes the display (deleted options are removed and changed options changed, but the changes are not permanent until you click **Save & Finish** to close the wizard.

- **Converting From or To a Pick List**
  When changing a custom field type *from* or *to* a pick list, be aware of this limitation:

  - You cannot convert a multi-select pick list to a text field.
    (You can convert a single-select pick list to a text field.)

Other Features

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

Password Security Improvements

- **Password Encryption Improvements—**PPM user passwords are now encrypted using the SHA-256 algorithm to strengthen security and improve resistance to unauthorized access. In an automatic process, when a user logs in, the password encryption is checked and, if necessary, upgraded to the new algorithm. The process is transparent to PPM users.

Percent Complete/Rollup Improvements

- Moving a child or summary task to position 0 no longer incorrectly changes Planned Work rollup.
- Deleting a child summary task no longer incorrectly adjusts Planned Work rollups.
- Changes to Planned Work will not corrupt corruptions in rollups.

Percent Complete/Rollup Improvements

- Reports that include Master Detail Relationship links can be run with appropriate options, allowing the report viewer to choose how the report is delivered.
- Report authors can report on actual work even if not using Timesheets.
- Emailed reports to valid non-enterprise addresses are not rejected as "spoofed."
- Report authors can report on the WBS of any task, allowing the schedule hierarchy to be represented.

Update Process Improvements

- **Enterprise Access without PPM Reports—**During PPM updates, upgrading the PPM Reports data model can lag behind other updates. To reduce system downtime during upgrades, PPM enterprises will now be brought back online even if PPM Reports are not yet accessible.

A message displays in any Dashboard Reports viewer or when attempting to go to PPM Reports:

Administrator Configuration Notes

Note: There are no features in the Daptiv PPM Summer '09 release that require administrative configuration.

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Fixed Issues

The following issues are fixed in PPM Summer '09.

🌱 Several fixed issues relate to the Greenhouse requests "Add 'Hours Work On' Data" and "Roll-up calcs sometimes error" with 260 points.

Area	Summary	Issue ID
Administration		
56771	Creating a new user who is inactive causes exception. -- *Support case:* 50747	
56963	Exception Error when Clicking Project List in Admin Zone -- Support case: 51266, 52072	
Capacity Planner		
56769	Capacity Planner calculation is incorrect when toggling off Project Net availability -- *Support case: 56769*	
Custom Fields		
56673	Custom Project Field sorts capital letters and lower case letters separately -- *Support case:* 50072	
Dynamic Applications		
33376	Cache doesn't clear when updating pick list items in DA and Custom Fields -- *Support case:* 24776, 25118, 24972, 25173, 25349, 19746, 25443, 25732, 26372, 26492, 26740, 26751, 25975, 27853, 28040, 28116, 28350, 29081, 28866,29346, 0622,30754,41889,51155	
56557	Create or edit of DA takes 5+ minutes -- *Support case:* 48920	
Gantt Chart		
48503	Gantt chart does not allow editing of task date with default task settings and a resource assigned -- *Support case: 36000*	
Notifications		
55588	Timesheet Reminders and Overdue notifications not being sent -- *Support case:* 36555, 36572, 40017, 40339, 40244, 43903, 46719, 46964, 47326,48703, 48964, 50498, 50778, 51015,51581	
56020	Timesheet due reminder not being delivered. -- Support case: 48703	
56955	Account Lockout Notifications reference eProject -- *Support case:* 51332	
ProjectTransit		
53315	Percent Complete Rollup inaccurate in PT project -- Support case: 42937, 43504, 44546, 44635, 46949, 48700, 45053, 49612, 49733, 49158, 49400, 50493, 50784, 51426	
56476	Project % complete is not matching after PT sync is broken and reestablished -- Support case: 48776	
56698	Percent complete incorrect on the Project Profile after sync and 'Update Status'. -- Support case: 50406, 50337, 50261	

Tasks	
30906	100% complete task schedule shows up as 99% on project level -- Support case: 22433, 33200, 32732
36828	Projects and rollup tasks are marked as more than 100% complete -- Support case: 25234, 25252, 21192, 23502, 25637, 26811, 26887, 27915, 28749, 28656, 30115, 30846, 31874, 32057, 33082, 33839, 33870, 23502, 31479, 36828, 35504, 35191, 36653, 36759, 36824, 49405
49784	Project status field schedule % complete is inaccurate -- Support case: 38082, 49644, 48579
52871	Planned work rollup incorrect Support case: 38032; 42238, 43079, 43049, 47152, 52015
53159	Negative Planned Work hours -- Support case: 42745, 42954, 44913, 45744, 46596, 46998, 48484, 50409
53919	Percent Complete over 100% for Summary Task -- Support case: 44495, 44741, 42238, 45973, 45221, 45196, 45973, 46841, 47835, 44774, 48613,48079, 49826, 52337
56445	Percent complete over 100% -- Support case: 48484, 50358
56687	Task Predecessor Lag drops after task is edited -- Support case: 50280
56670	Tasks changing to Milestones when editing the fix duration (effort driven) tasks and adding 20 to 30 assignees. -- Support case: 49938, 49948, 50079, 50082, 50132, 50168, 50274,50407,50520, 50675, 50927, 51028, 51005,51396, 51588, 52211, 52223, 5224
56688	Last Update Notes field displays code in Tasks Tab -- Support case: 50229, 51997
56822	Fixed duration effort driven task doenst allow you to maintain PW and duration -- Support case: 50957, 51170, 51447, 51800, 51876
Timesheets	
54148	Timesheet Export does not include time from Project set to Track Time at the Project Level if the project contains a task -- *Support case: 44147, 44742, 50718*
Usability	
56671	Text Wrap Incorrect in Admin area DA names -- *Support case: 50165*

Reports (PPM)	
49111	Report w/ Master Detail Relationships throws and exception error when the report is run with options. -- Support case: 36992, 37764, 38354, 38751, 38880, 39086, 39058, 39246, 39545, 39815, 39449, 39984, 40278, 41171, 41593, 41635, 41677,41682, 41928, 42594
49676	Customer's not receiving scheduled reports due to senders email being blocked -- *Support case: 37026, 38304, 36966, 40157, 41244, 42427, 40060, 42691, 42982, 43479, 46943, 47851*
52989	Cannot report on Capacity if Timesheets are turned off -- *Support case: 42235*
56748	Fields are corrupt and will no longer run in reports -- *Support case: 50568*
56951	Cognos model sync fails when DA solution has non-numeric defaults in numeric fields -- *Support case: 51361*
Web Services (Business Services)	
56776	Problem with Web Services API: Projects created via WS2.0 can't be retrieved by WS1.0 -- *Support case: 50700*
57047	Unable to include '=' character when transmitting URLs into custom fields via web services -- *Support case: 52000*
Workweek Exceptions	
56785	Cannot add nonworking time in other cultures -- *Support case: 50791*

Appendix

Advance Notice: Legacy Reporting to be Discontinued

Beginning with the Fall '09 release of PPM, access to legacy reports and reporting functionality will be disabled.

In-line notifications announcing this change were added to the applicable PPM pages in late January, 2009 with the second quality update of PPM Winter '09 (QU2)..
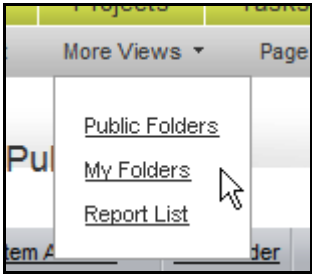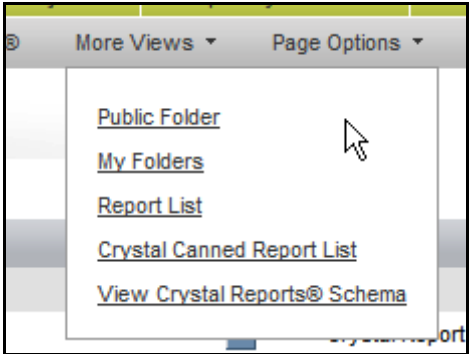
This change affects the small subset of PPM users who still do one or more of the following:

- **Run "Canned" reports**
- **Upload Crystal Reports**
- **Create legacy Custom Reports**
- **Run Crystal Reports or legacy custom reports**
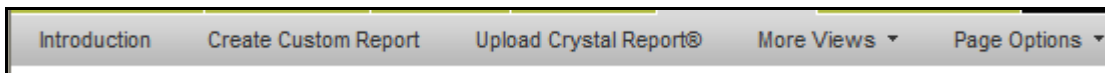- **Use the Project Home "Project Reports" Dashboard Pane**

Access to these options is currently available after clicking **Report List**:

- **"Canned" reports**—An option from the **More Views** menu
- **Upload Crystal Reports**—An option from the Tab toolbar
- **Create legacy Custom Reports**—An option from the Tab toolbar
- **Run Crystal Reports or legacy custom reports**—Options from the **Report List**
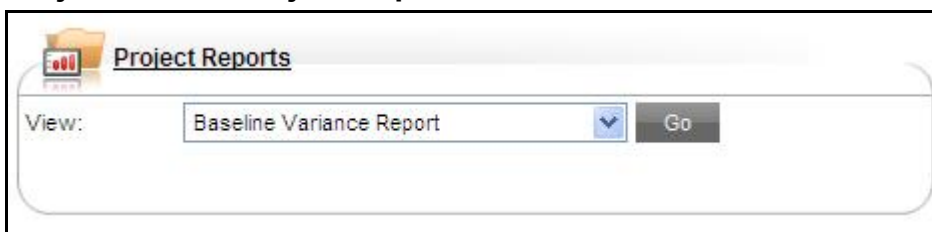
The **More Views** menu:

Before clicking **Report List**	After clicking **Report List** (these options will no longer be available)

Tab toolbar (after clicking **Report List**):

The Project Reports Dashboard Pane is an option when customizing your Project Home page:

- **Project Home "Project Reports" Dashboard Pane**

Report List

The **Report List** option will be removed from the **More Views** menu and you will not have access any menu or toolbar options for creating or running canned, custom or Crystal Reports, including:

- **Running Canned Reports**
  You will not be able to access the **Crystal Canned Reports List** option.

- **Creating Crystal Reports**
  You will not be able to access the **Upload Crystal Report** option on the tab toolbar to upload Crystal Reports.
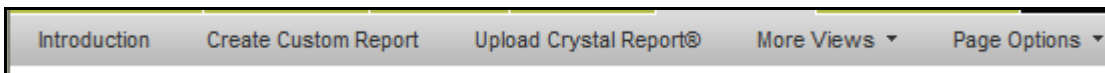
- **Creating Custom Reports**
  You will not be able to access the **Create Custom Report** option on the tab toolbar to create any legacy Custom Reports.

- **Running Crystal Reports or Custom Reports**
  The **Reports List** option will be removed, so you will not have access to existing Crystal Reports or legacy custom reports.

  Note: The Reports List displays those reports you created using the legacy Custom Reports Wizard or by uploading a Crystal Report to PPM.

About the Daptiv Greenhouse

The Greenhouse is an online forum for Daptiv customers to make suggestions for product improvements. Customers can comment on suggestions made by others, as well as vote for the ones they would most like to see implemented. For more information about the Greenhouse, log into the Daptiv Community (http://community.daptiv.com/) and click the **Greenhouse** tab.